Survivor Outreach Services (SOS) Coordinator User Guide

July 2011
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This document was prepared on behalf of:

Shaunya Murrill
Chief, Outreach and Strategic Integration Division
Family Programs Directorate
Family and MWR Programs, IMCOM G9

2406 Gun Shed Road, 2nd FL
Ft. Sam Houston, TX 78234-1222

e-mail: Shaunya.Murrill@us.army.mil
Army OneSource - www.myarmyonesource.com
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1. Welcome

The purpose of the Survivor Outreach Services (SOS) program is to manage new and existing Survivors, import Survivors from existing spreadsheets, assign Survivors to SOS Coordinators, to track contacts with Survivors and to track the services provided.

The Survivor Outreach Services Coordinator User Guide provides detailed descriptions of the procedures used to access and manage cases in the SOS program.

Below is a list of Acronyms that will be used throughout the guide.

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ACS (Army Community Service)</td>
</tr>
<tr>
<td>2</td>
<td>SOS (Survivor Outreach Services)</td>
</tr>
<tr>
<td>3</td>
<td>FMWRC (Family and Morale, Welfare and Recreation Command)</td>
</tr>
<tr>
<td>4</td>
<td>CAC (Casualty Assistance Center)</td>
</tr>
<tr>
<td>5</td>
<td>NOK (Next of Kin)</td>
</tr>
<tr>
<td>6</td>
<td>DCIPS (Defense Civilian Intelligence Personnel System)</td>
</tr>
</tbody>
</table>
2. Accessing the SOS Program

To access the Survivor Outreach Services application, navigate to the ACS Staff website at https://www.acsstaff.org.

If you are not registered with the ACS Staff website, click the button to go to the Registration screen and click the Click here to register now link.

Next, you will need to fill out the registration form:
To enter the ACS Staff site, you will need to log in.

1) Enter your **Username** and **Password** and then click the **Login** button to enter the ACS Staff site.

Or

2) Log in with your **Common Access Card** (CAC) by clicking the **CAC Login** button. You will need to have your CAC authenticated first.
The ACS Staff homepage is displayed:

![ACS Staff homepage]

From the left navigation bar, on the ACS Staff homepage, click the button to access the **Survivor Outreach Services** application.
3. SOS Features

The **Survivor Outreach Services Application Dashboard** will display cases/survivors that have been assigned.

![SOS program dashboard](image)

**Figure 6 SOS program dashboard**

The following appears on the SOS homepage:

<table>
<thead>
<tr>
<th>Dashboard Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Personal Information</td>
<td>The SOS program displays your current garrison, your name, and today’s date.</td>
</tr>
<tr>
<td>2 Search/ Advance Search</td>
<td>Search for <strong>Survivors Cases</strong> by <strong>Last Name</strong> or use the <strong>Advance Search</strong> to filter your search results with additional fields like Soldier Last Name, NOK CAC, Case Status, and more.</td>
</tr>
</tbody>
</table>
3 Clients
The Clients tab is the default tab that displays when you enter the SOS program. The Clients tab displays any cases which are currently assigned to you, both new and ongoing.

4 Follow Up
The Follow Up tab allows you to view cases flagged for follow up. You are able to track additional meetings, calls, and other services related to your cases.

5 Create Case
The Create Case tab allows you to enter a new case into the SOS.

6 Newly Assigned Clients
Newly Assigned Clients displays new cases that have been assigned to the SOS Coordinator Staff.

7 Assigned Clients
Assigned Clients displays ongoing active cases.

3.1 Clients
The Clients tab is the default tab. To access cases click the Clients tab. The Clients dashboard will display new and currently assigned cases sorted alphabetically by survivor last name.

Figure 7 Clients tab view

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New cases will filter to the top section labeled **Newly Assigned Clients** and current **Cases** will filter to the bottom section labeled **Assigned Clients**.

### 3.2 Newly Assigned Clients

**Newly Assigned Clients** are cases that have been assigned to you by Headquarters or cases that you have entered in manually.

### 3.2.1 View Survivor Record

To view a new case, click on a **Survivor Details** link to display the survivor record.

From the **View Survivor Record** page you can **Add Contact** or **Edit**.

![View Survivor Record](image)

Figure 8 Survivor record view
3.2.2 Add Contact
To add a new contact on a survivor case record complete the following steps:

1. Click the **Add Contact** button from the Survivors Record page. The Contact Details page will open.

2. Enter in the specifics of the contact like Contact Date, Duration, Contact Type, and Category. Use the tabs to navigate between Discussion, Assessment, Outcome, Location, and Follow Up.

3. Once the Contact Details are completed, click the **Add Contact** button to save the information.

The following is a description of the Contact Details page for Add Contact.
<table>
<thead>
<tr>
<th>Contact Details Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Contact Date</td>
<td>Enter the date the contact took place. Manually enter the date or click the <a href="#">Calendar</a> button to open the calendar and select a date.</td>
</tr>
<tr>
<td><strong>2</strong> Duration</td>
<td>Use the drop-downs to enter the length of time of the contact. Enter in hours and minutes.</td>
</tr>
<tr>
<td><strong>3</strong> Contact Type</td>
<td>How did support coordinator contact the client? Use the drop-down menu to select an option from the provided list. Options include: Email, In Person, Regular Mail, SOS Training and more.</td>
</tr>
<tr>
<td><strong>4</strong> Category</td>
<td>What was the category of the contact? Use the drop-down menu to select the reason for the contact with the client. Options include: Benefits Counseling, Financial Counseling, Military Chaplains and more.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Details Option</th>
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</tr>
</thead>
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</tr>
<tr>
<td><strong>4</strong> Category</td>
<td>What was the category of the contact? Use the drop-down menu to select the reason for the contact with the client. Options include: Benefits Counseling, Financial Counseling, Military Chaplains and more.</td>
</tr>
</tbody>
</table>

Please Select:

- CNO/CAO
- Conference Call
- Email
- Facebook
- In Person
- Regular Mail
- SOS Training
- Telephone
- Text Message
- Webinars / Other
5. **Discussion**

   Use the **Discussion** tab to record the details of the conversation in the text box provided.

6. **Assessment**

   Use the **Assessment** tab to record the evaluation of the individuals need during the contact.

7. **Outcome**

   Use the **Outcome** tab to record the conclusion(s) of the contact session with the client.

8. **Location**

   Use the **Location** tab to record the place of the meeting.

   If the contact of the meeting was offsite use the **Off-Site Location** feature to enter specific location.

9. **Follow Up**

   Use the **Follow Up** tab to record notes or tasks needed to perform or follow up with the client.

   Set the preferred method of future contact, date, subject, and details of the follow up.

   Click on **Add Contact** when the **Follow Up** is complete.

   The follow up will be accessible from the SOS. Click on the **Follow Up** tab to view.

10. **Add Contact**

    To save the **Contact Details** click on the **Add Contact** button.

### 3.3 Case Follow Up

To view cases flagged for follow up, click the **Follow Up** tab from the SOS dashboard. The **Follow Up** page will display.

The **Follow Up** page displays the Due Date, Subject, Survivor name, Status, and Method of follow up for assigned cases.

To view the details of a Follow Up:

1. Locate the **Survivor** name to follow up with.
2. Under the **Subject** column, locate the subject name.
3. Click on the subject name link under the **Subject** column.
4. The **Follow Up Item** page will open.
5. Add final notes and changes to the **Details** section.
6. Click the **Create Extended Contact** button to complete the follow up.

### 3.4 Creating a New Case

To enter in a new case complete the following steps:

1. Click the **Create Case** tab.
2. When the **Create Case** window opens complete all required fields. Required fields are indicated with a “**” symbol next to the field name.
3. Fill in available case information by using the text boxes and dropdown menus.
4. Click the **Create SOS Case** to save the case to the system.
Figure 13 Creating an SOS case

The new case will now display in the **Newly Assigned Clients** section of the **Clients** tab. The case can now be viewed, edited or have new contacts added.

### 3.4.1 Edit a Survivor Record

To update information on a Survivor record, complete the following steps:

1. From the SOS dashboard click on the **Clients** tab.
2. Locate the case and **Survivor Info**.
3. Click on the **Survivor Details** link to display the **View Survivor Record** page.

4. Click the **Edit** button.

5. Update the information and click **Save Survivor** to save the record.

![Editing a survivor](image-url)

### Survivor Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Army</td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Rodgers</td>
</tr>
<tr>
<td>CAC Center</td>
<td>Fort Buchanan</td>
</tr>
</tbody>
</table>

Is it OK to contact this survivor? [ ] Yes  [ ] No

### Soldier Information

- Casually Full Name: Rodgers, John
- Relationship: Nephew
- Date of Death: 1/22/2007
- Case Number: 267203

### Home Address

- Address: 5434 Ingraham Street
- City or Town: Puerto Rico
- State or Province: Puerto Rico
- Zip or Postal Code: 00601

### Contact Details

- Email Address: GennyRodgers@aol.com
- Primary Phone: 787-234-5555
3.4.2 Edit a Casualty Record
The **Update Casualty Record** information includes the Case Number, First Name, Middle Name, Last Name, and Date of Death. It also includes Military Information and Family Members linked to the casualty.

To update information on a Casualty record, complete the following steps:

1. From the SOS dashboard click on the **Clients** tab
2. Locate the case and **Casualty Info.**
3. Click on the **Casualty Details** link to display the **Update Casualty Record** page.
4. Update the information and click on the **Update Casualty Record** button to save the record.

![Figure 15 Updating a casualty record](image)

3.5 Search and Advance Search

3.5.1 Search
Use the **Search** box on the SOS homepage to search for cases using survivor last names. Type in a **last name** and click the **Search** button to display results.

![Figure 16 Last name search](image)
3.5.2 Advance Search

The **Advance Search** is used to further filter search results based on information like Case ID, NOK CAC, Soldier Last Name and more.

The more information placed in the **Advance Search** fields the more restricted the search results will become.

1. From the SOS dashboard, click the **Advanced** link below the **Search** box.
2. Enter in the information to search.
3. Click the **Search** button to display search results.

![Figure 17 Advance search screen](image)

**Advanced Search Details:**

<table>
<thead>
<tr>
<th>Advanced Search Filters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Survivor Last Name</td>
<td>Use the Survivor Last Name field to search for a Survivor case by last name.</td>
</tr>
<tr>
<td>2 Soldier Last Name</td>
<td>Use the Soldier Last Name field to search for a Casualty Soldier case by last name.</td>
</tr>
<tr>
<td>3 NOK CAC</td>
<td>Use the NOK CAC dropdown menu to search for a specific CAC location or garrison and the records associated with it.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Depending on your SOS access level you will be restricted to the CAC locations or garrisons available in the dropdown list.</td>
</tr>
<tr>
<td>4 Case Status</td>
<td>Use the <strong>Case Status</strong> dropdown menu to filter your case search</td>
</tr>
<tr>
<td><strong>Advanced Search Filters</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><strong>All</strong></td>
<td>results by All, New, or Active status.</td>
</tr>
<tr>
<td><strong>Case ID</strong></td>
<td>Use the <strong>Case ID</strong> or the <strong>DCIPS ID</strong> field to search by case number.</td>
</tr>
<tr>
<td><strong>Relation</strong></td>
<td>Use the <strong>Relation</strong> dropdown menu to filter search results by relationship to the Casualty Soldier.</td>
</tr>
<tr>
<td><strong>Staff Assignment</strong></td>
<td>Use the <strong>Staff Assignment</strong> to filter case search results by All, Assigned, or Un-Assigned status.</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>Click the <strong>Search</strong> button to perform the search.</td>
</tr>
</tbody>
</table>
4. For Additional Assistance

For any additional questions that this guide did not answer, contact the ACS Staff Technical Support Team at support@acsstaff.org.

Please do not hesitate to contact us regarding your comments, thoughts, or ideas on how we can continue to meet your needs.

You can also email us through the Feedback link located at the bottom of the screen.

You can also access the Feedback screen by clicking on the button in the top right of the ACS Staff Homepage: