

3. Click Preview after all required parameters have been selected to view the report.
4. Export or Print the report.

System Report Controls



System Report Controls

Label	Name	Description
A	Parameter Viewer Icon	Show/Hide switch for viewing system report parameters
B	Export Icon	Export the system report in the format of your choice (formats vary by module)
C	Print Icon	Print the report directly from the viewer

Creating a New ARCS Ad Hoc Report

There are five steps to creating a new Ad Hoc Report:

1. Select [Create Report](#)
2. [Select Entities](#) to be reported
3. [Organize Columns](#) to display the desired information
4. [Specify Conditions](#) for the report
5. [Save the Report](#)

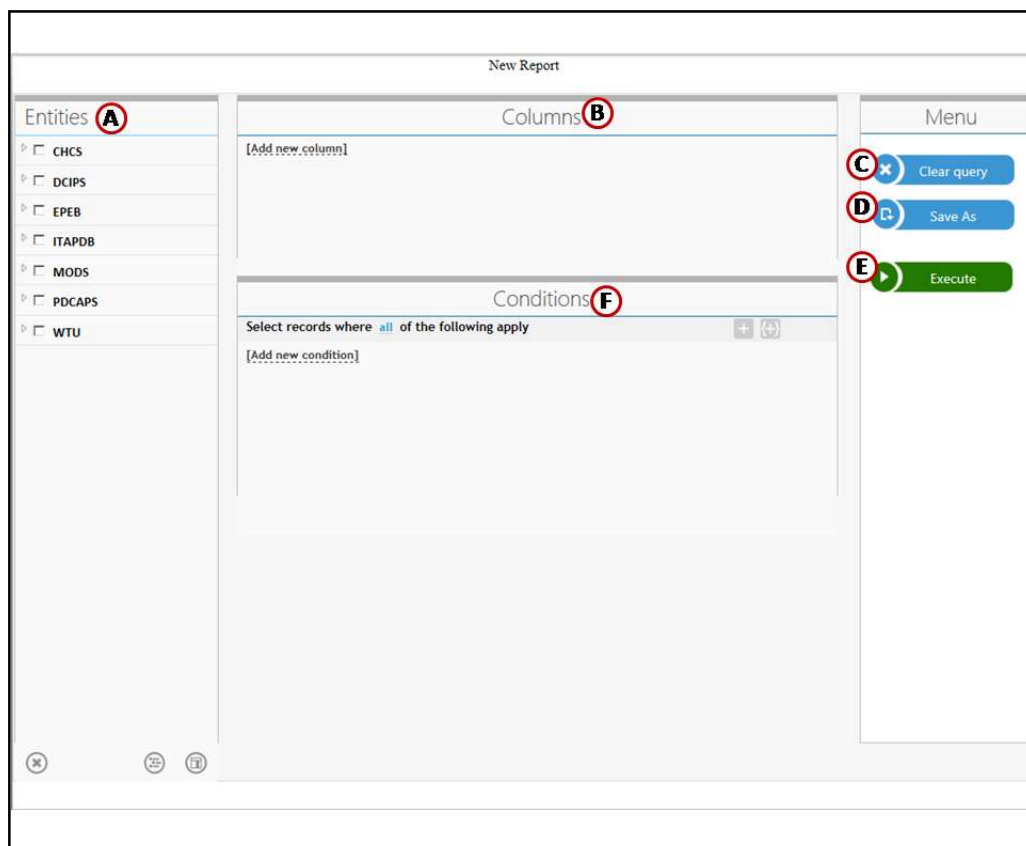
NOTE: For assistance building Ad Hoc Reports, please contact your Program Analyst or the ARCS Service Desk.

See [Delete Ad Hoc Report](#) for information on deleting reports from ARCS.

Create Report

1. Open the REPORTS screen in from the upper right of the header
2. Click **Create Report**

3. The Ad Hoc Report Creation Tool screen opens.

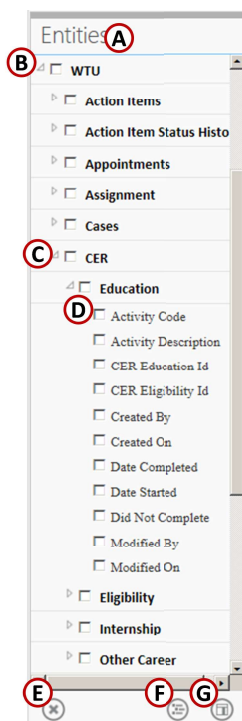


Ad-Hoc Report Builder

Label	Name	Description
A	Entities	Lists the data fields that are available to use in the report as displayed columns or as conditions
B	Columns	Lists the selected data fields that have been selected for reporting. The columns can be reordered and sorted.
C	Clear Query button	Clears the selected information from Columns and Conditions (clean re-start)
D	Save As button	Click Save As to save the report definition
E	Execute button	Click Execute to run the report
F	Conditions	Use this section to add, delete, and define the conditions used to customize the report

Select Entities

The reporting entities that you select will be the building blocks of your report. You can arrange them the way you like by setting up columns and conditions. Each selected entity can be added to the report as a column, a condition or both.

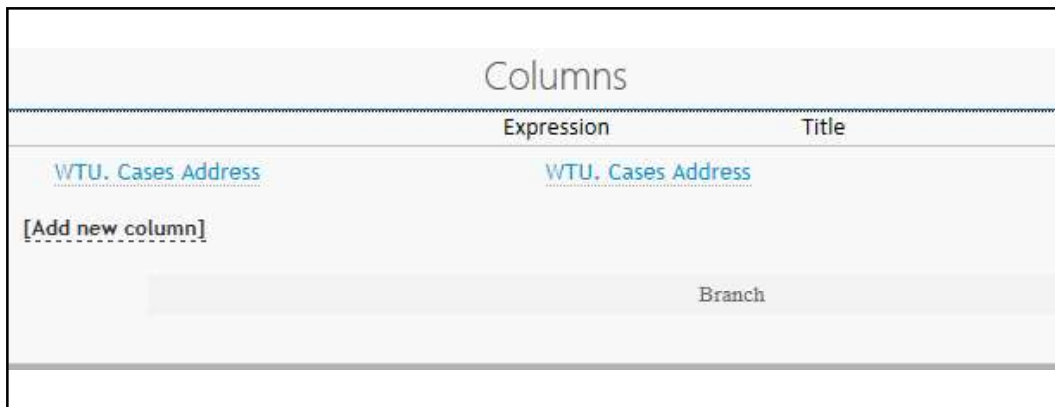


Entity Selection Screen

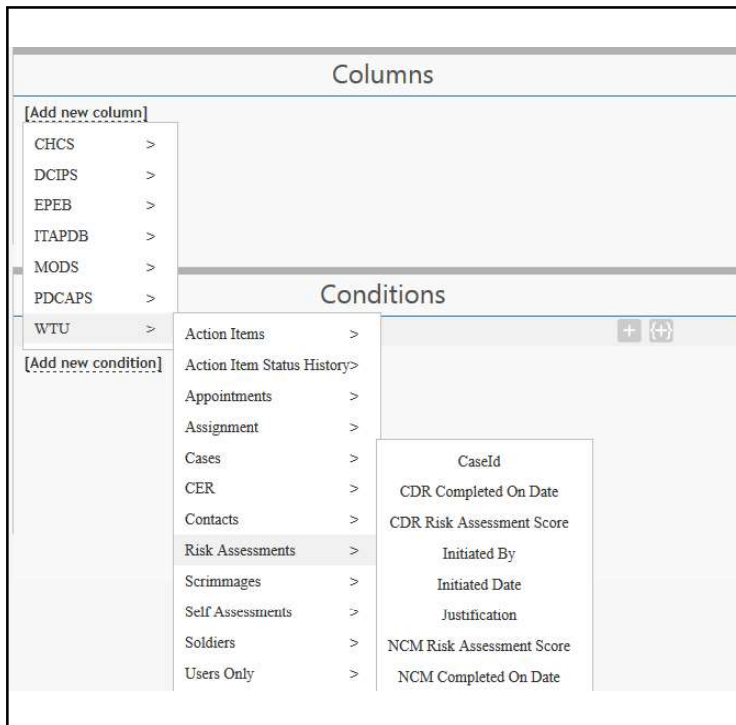
Label	Name	Description
A	Entities	Entities – Reportable data fields that may be selected for the ad-hoc report.
B	Expand/ Collapse Arrow	Click to expand or collapse entities sub groups
C	Subgroup	Expand the top-level entity to show all related sub-entities.
D	Entity	Specific data fields
E	Clear	Clear all selections
F	Move to Conditions	Moves selected entities to the Conditions window
G	Move to Columns	Moves selected entities to the Columns window

Another way to add entities to Columns and Conditions, is by using “drag and drop”. Click an entity without releasing the mouse button, drag the entity to the Column or Condition

window, and then release the mouse button. The picture below shows “Branch” being dragged into the Columns window.



The last way to add columns or conditions is to click on the [Add new column] or [Add new condition] links. Clicking on the links will open selection menu to choose the data item. Click on the data field to select.



Organize Columns

Once you have selected entities for your report, you can determine how you want your columns to display, e.g., in what order they should appear on the report and how each individual column should be sorted.

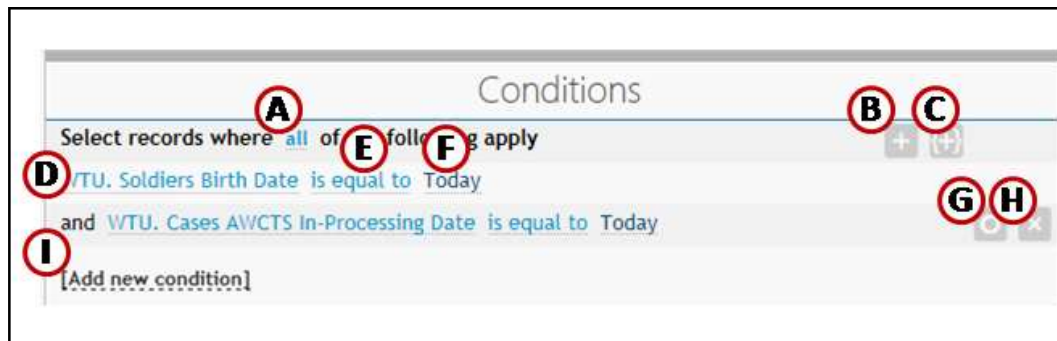


Report Selected Columns Description

Label	Name	Description
A	Sorting/Move Options	Sorting (Currently, only one column at a time may be sorted) • Not Sorted • Ascending • Descending Moves (re-order the columns) • Move to the top (make it the first item) • Move up (move up one position) • Move down (move down one position) • Move to the bottom (make it the last item)
B	Expression	Name of the entity.
C	Title	Same as Expression: Name of the entity.
D	Change to Aggregate Column	Changes the data field from reporting system data to aggregating, e.g., count, sum, average, minimum, maximum.
E	Delete	Remove (delete) data field from the report
F	Add New Column	Another option to add columns to the report. Opens list of all data fields for individual selection

Specify Conditions

Conditions can be added, added to groups, defined, and deleted.



Specify Report Conditions Screen

Label	Name	Description
A	Conditions options	Click the hyperlink to view a menu of available options, including: • all (AND) • any (OR) • none • not all
B	Add new condition	Select to view a multi-level menu to select conditions to add to report, e.g., case is active and in-processing date is between April and May.
C	Add group of conditions	Allows compound conditions. For example, "Show all cases that are active and (M2 Eligibility is Y or CDR Eligibility is Y)."
D	Entity	Selected condition(s) for the report
E	Operation	Click the hyperlink to view a menu of available operations, including: • starts with • contains • is equal to • does not start with • does not contain • is not equal to • in sub query • is null • is not null <u>NOTE: The options in this menu will change, depending on the type of condition (data field) selected.</u>

Label	Name	Description
F	Value	Click the hyperlink to enter or edit a value, such as an amount, number of days, date range, etc. <u>NOTE: This will change, depending on the condition and operation selected.</u>
G	Toggle	Turn condition on or off (helps in troubleshooting)
H	Delete	Delete the condition from the report
I	[Add New Condition]	Select to view a multi-level menu to select conditions to add.

Save Ad Hoc Report

To save a report definition:

1. Click **Save As**.
2. A pop-up window opens



3. Enter a name for the report and click **OK**
4. Another pop-up window opens



5. Enter a description for the report (optional) and click **OK**
6. A Report save message is displayed.



7. Click **OK** to close the window

Delete Ad Hoc Report

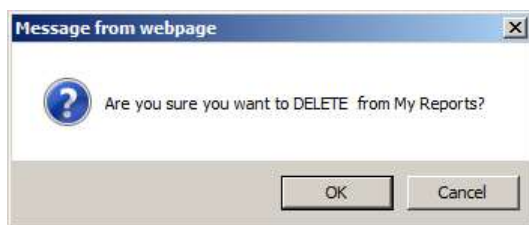
Note: Only the creator of the ad hoc report or an Administrator has permission to delete that report.

To delete a report.

1. Go to **Reports**
2. The Reports page is displayed showing “My Reports”

Report Name	Type	Description	Created By	Created On	Access
_CER Eligibility Report	ADHOC			06 Oct 2014	role
Active Cases	ADHOC			02 Sep 2014	owner Delete
Active cases w/ RELFWTU	ADHOC			04 Dec 2014	owner Delete
Active Users	ADHOC			07 Aug 2014	owner Delete

3. Click the **Delete** hyperlink of the report to be removed
4. A warning message is displayed



5. Click **OK** to delete the report or click **Cancel** to close the dialog box without deleting.

Ad-Hoc Report¹ Creation Example

The following section will show the step by step creation of a simple report.

Task: Create an ad-hoc report that shows whether a Soldier is eligible to participate in Career and Education Readiness (CER).

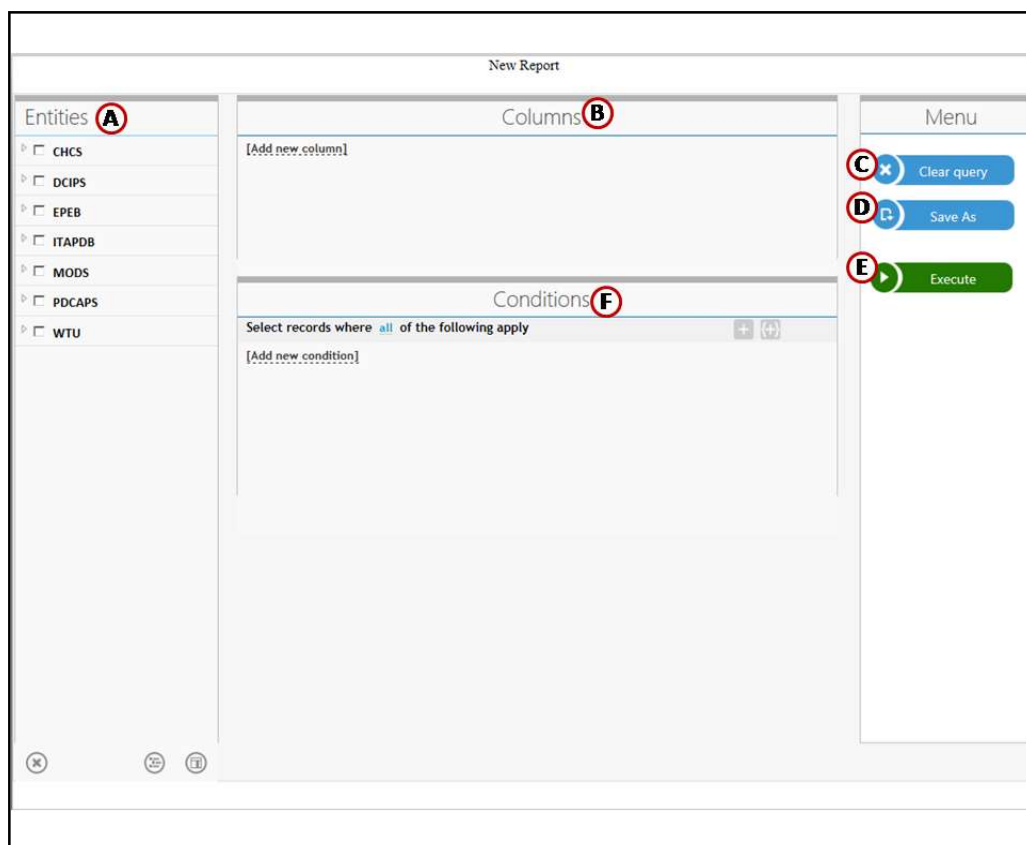
Data columns: Report the Soldier's Last Name, First Name, SRU, Company, Platoon, Squad, M2 Eligibility, and CDR Eligibility.

Condition: The case is active (Soldier is still in a SRU)

Steps:

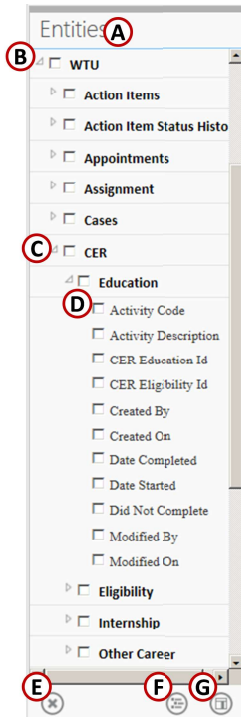
1. Log in to ARCS and click on Reports. 
2. Click on Create Report. 
3. The New Report window is displayed.

¹Report created with user selected entities. Ad Hoc reports can be run one time, so the report can be saved and run again in the future.



4. Start by selecting the data to be displayed in the columns
5. Click on the arrow next to SRU to expand the options then click the arrow next to Soldiers and click the following checkboxes:
 - a. Soldier First Name
 - b. Soldier Last Name
 - c. SRU
6. Click the arrow next to Assignment to expand the options and click the following checkboxes:
 - a. Company
 - b. Platoon
 - c. Squad
7. Click the arrow next to CER to expand the options, then click the arrow next to Eligibility and click the following checkboxes:

- a. CDR Eligibility
 - b. M2 Eligibility
8. Click the Add Column icon on the bottom of the Entities box.



9. The selected columns are transferred to the Columns box. Scroll down to see more of the entities.



10. Change the order of the columns:
 - a. Scroll down to SRU.Soldiers Soldier First Name and use the mouse over the link. A blue up/down arrow is displayed.
 - b. Click on the up/down and click on "Move to the top"
 - c. Repeat for SRU.Soldiers Soldier Last Name
 - d. The Columns box now shows Soldiers Last Name and Soldiers First Name as the first two columns of the report.
11. Click the Clear Selection icon in Entities
12. Click on the arrow next to Cases to expand the options and click the following check-box:
 - a. Status Type Code
13. Click the Add Condition icon on the bottom of the Entities
14. The selected column is transferred to the Conditions box



15. Click the starts with link to view the options available for this data field. Click on Contains.
16. Click the [enter value] link for SRU. Cases Status Type Code, enter "Active" (without the quotes) and press the Enter key.
17. Click the Save As button and enter a name for the report
18. Click OK and click OK two more times
19. Click Execute to view the results

Result									
TOTALROWS	RowNumber	WTU_Soldiers Soldier Last Name	WTU_Soldiers Soldier First Name	WTU_ Assignment Company	WTU_ Assignment Platoon	WTU_ Assignment Squad	WTU_CER_ Eligibility CDR Eligibility	WTU_CER_ Eligibility M2 Eligibility	WTU_ Soldiers WTU
4	1	TEST	SOLDIER26	HHC	1st	1st	null	null	CBWTU Illinois
4	2	TEST	SOLDIER27	HHC	1st	1st	null	null	CBWTU Illinois
4	3	TEST	SOLDIER40	HHC	1st		Y	Y	CBWTU Virginia
4	4	TEST	SOLDIER41	HHC	1st	1st	null	null	CBWTU Illinois

The results show that SOLDIER40 is eligible for CER since both the CDR and M2 eligibilities are set to “Y.” The rest do not appear to have been evaluated yet as the CDR and M2 Eligibilities are null (no value has been entered in these fields). If there had been a recorded eligibility determination and it was not eligible, the data field would display “N.”

SRU Users Grid

This section describes how to use the Users Dashboard to manage ARCS users. Administrators are responsible for managing user access to the ARCS features, functionality, and data.

Click **Users** on the Menu Bar header.

USERS									
Page size: 25									
Page 1 of 7, rows 1 to 25 of 156									
User	Work Phone	Primary Role	MRC	SRU	CO	PLT	SQD	Is Active	Last Updated
10_SSSA		Administrator	All					True	16 Apr 2021
25_AW2RCC01_Polk		AW2 RCC	MRC-C	Fort Polk				True	07 Jun 2017
25_BNCDR01_Polk		Battalion Commander	MRC-C	Fort Polk				True	30 May 2017

User Dashboard Items

	Name	Description
A	Addicon	Click the Add icon to add a new user
B	Filters	Search or sort users based on grid information
C	Name hyperlink	Click a user hyperlink to open the User Details screen for viewing or editing

View SRU User Details	116
Edit SRU User	116
Add New SRU User	117
User Profile Attachments	119
Deactivate SRU User	123
Re-activate SRU User	124

View SRU User Details

To open an existing user account for viewing or editing, click the name hyperlink from the Users Dashboard

The SRU User Details screen opens.

The screenshot displays the 'SRU User Details' form for a user named Bob Smith. The form is organized into several sections:

- Header:** Includes a 'Close' button and a 'Edit' button.
- User Information:** Fields for DOID (1000000467), SSN (MRC-East), First Name (Bob), Middle Name (Smith), Last Name (Smith), HIRMA Certified (22 Jan 2024), and User is Active (checked).
- Contact Information:** Fields for Work Email (BobSmith@test.com), Work Phone (111-111-1111), Home Phone, Address 1, Address 2, City, State (United States), and Postal Code.
- Account Information:** Fields for On Call User (No), Role (Social Worker), Primary Role (Social Worker), and Position Title (Social Worker).
- Attachments:** A table listing user attachments with columns for File Name, File Type, Document Date, Added By, and Added On.

File Name	File Type	Document Date	Added By	Added On
Details - SAMS	System Access Request Form	26 Feb 2024	Real, 100 AdminReal	04 Mar 2024
Details - HIRMA	HIRMA Training Certificates	22 Jan 2024	Real, 100 AdminReal	04 Mar 2024

Edit SRU User

To edit an existing user account:

1. Click Edit.

The Edit SRU User screen opens:

2. Update user details and/or permissions.
3. Click **Save** to save the changes, or **Cancel** to close the window without saving. The icons are found in the upper right- hand corner.

Add New SRU User

New ARCS account requests require a signed DD 2875 System Access Request and current HIPAA Certificate.

After receiving the required documentation from a user, you can create a new user account. To add a new user:

1. Click the Add icon .

The Add New User screen opens.

2. Enter the User's DODID from their ID card.
3. Click **Add** to continue, or **Cancel** to quit without saving.

The SRU User Details screen opens.

NOTE: If the User has had an ARCS account, the record will open. Update the existing information and ensure the User is Active box is checked..

4. Select the level of assignment (MRC, SRU, Company, Platoon, Squad).
The available roles will vary based on the user's assignment.

5. Enter the required information. All required fields are marked with an asterisk (*).
6. Add at least one SRU System Role from the pick list.
7. Select the User's primary role.
8. Click **Save** to save the new user's account, or **Cancel** to return to the User Dashboard without saving.
9. Open the new User's profile.

Users									
WTU									
Page size: 25									
Page 1 of 1, rows 1 to 2 of 2									
User	Work Phone	Primary Role	RMC	WTU	CO	PLT	SQD	Is Active	Last Updated
OMB 10, ombudsman 10		WTC Leadership	All					True	18 Mar 2015
Smith, Bob	123-456-7890	Nurse Case Manager	RHC-A (P)	Fort Belvoir	HHC				20 Sep 2016
Page 1 of 1, rows 1 to 2 of 2									

10. Add the User's DD 2875, System Access Authorization Request, and HIPAA Certificate to the attachments section.

Attachments					
Page size: 25					
Page 1 of 1, rows 1 to 3 of 3					
File Name	File Type	Document Date	Added By	Added On	
Details SAAR	System Access Request Form	26 Feb 2024	Real, 000 AdminReal	04 Mar 2024	
Details HIPAA	HIPAA Training Certificates	22 Jan 2024	Real, 000 AdminReal	04 Mar 2024	
Details Cyber Awareness	DDO Cyber Awareness	05 Feb 2024	Real, 000 AdminReal	04 Mar 2024	

User Profile Attachments

Use the Attachments section of the profile to upload required DD 2875 system Access Request and HIPAA Certificates.

Attachments					
Page size: 25					
Page 1 of 1, rows 1 to 3 of 3					
File Name	File Type	Document Date	Added By	Added On	
Details SAAR	System Access Request Form	26 Feb 2024	Real, 000 AdminReal	04 Mar 2024	
Details HIPAA	HIPAA Training Certificates	22 Jan 2024	Real, 000 AdminReal	04 Mar 2024	
Details Cyber Awareness	DDO Cyber Awareness	05 Feb 2024	Real, 000 AdminReal	04 Mar 2024	

Attachments Screen Items

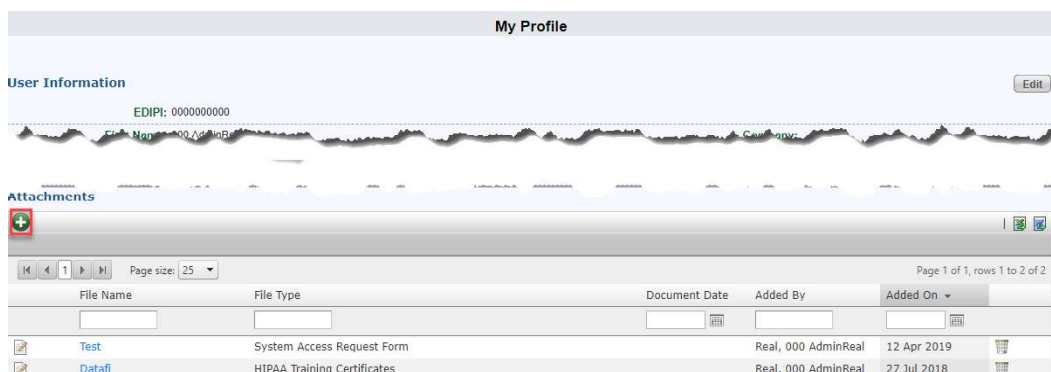
Label	Name	Description
A	Add Attachment icon	Click the Add icon to add a new attachment. This adds a case log entry in the case log.
B	View PDF Attachment	Click the View PDF icon to view the attachment in a pop-up.
C	View Attachment Details hyperlink	Click the View hyperlink to view the attachment details
D	File Name hyperlink	Click the file name hyperlink to download the attachment
E	Delete Attachment icon	Click the Delete icon to delete the attachment

Update HIPAA Certificate

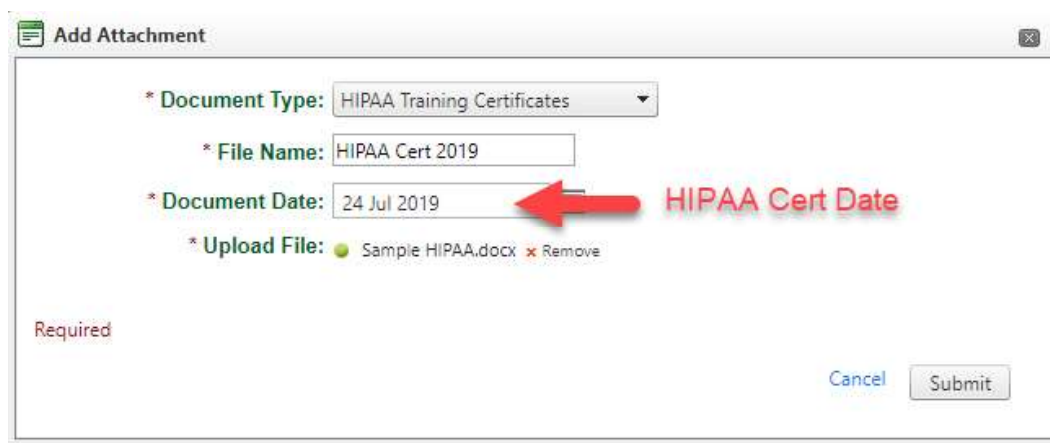
HIPAA certification is required for ongoing access to ARCS. Accounts are suspended automatically on the first of the month following the expiration of the current HIPAA Trained date. When a user's HIPAA Certification is within 1 month of expiration, a warning message will be displayed at each log in indicating the pending suspension from ARCS.

To update a the HIPAA Certificate from "My Profile:

1. Click the Add Attachment icon .



2. Complete the fields - Document Date = Date Completed on HIPAA certificate.



3. Click Submit.

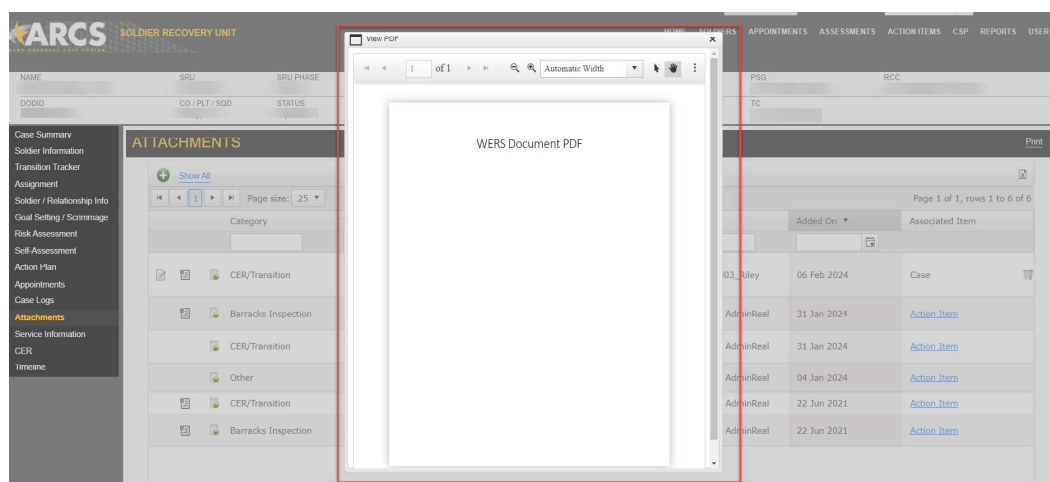
The HIPAA Trained or HIPAA Certified Date will automatically update to match the Document Date indicated in the upload.

[View PDF Attachment](#)

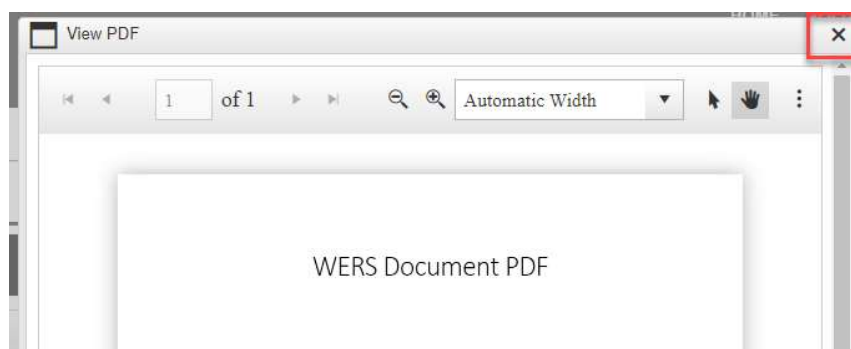
To view the PDF in a pop-up window:



1. Click the icon
2. The View PDF window opens



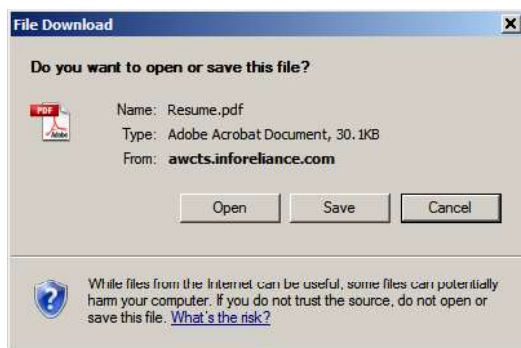
3. Select the X icon to close the window



Download Attachment

To download an attachment:

1. Click the **file name** hyperlink.
2. The File Download dialog box opens.

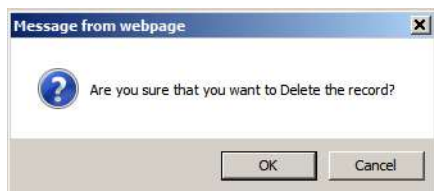


3. Click **Open** to open the attachment, **Save** to save the file to another location (e.g., hard drive), or **Cancel** to stop the download.

Delete Attachment

To delete an attachment:

1. Click the Delete icon  to the right of the attachment.
2. The Delete Attachment dialog box opens.



3. Click **OK** to delete the attachment or click **Cancel** to return to the Attachment screen.

Deactivate SRU User

To deactivate a User account:

1. Open the User's record by selecting **Edit**.
2. Un-check the **User is Active** check box.



The screenshot shows the 'SRU User Details' form. The 'User is Active' checkbox is located at the bottom left and is currently unchecked. The form includes fields for EDIP, First Name (Thomas), Middle Name, Last Name (Smith), MRC, SRU, Company, Platoon, and Squad. The 'Cancel' and 'Save' buttons are at the top right.

3. Click **Save** to deactivate the user, or **Cancel** to close the window without saving.

Re-activate SRU User

To enable a suspended User account:

1. Open the User's record by selecting **Edit**.
2. Check the **User is Active** check box.



The screenshot shows the 'SRU User Details' form with the 'User is Active' checkbox checked. The form fields are the same as in the previous image, but the checkbox is now checked. The 'Cancel' and 'Save' buttons are at the top right.

3. Click **Save** to activate the user, or **Cancel** to close the window without saving.

Soldier Case

This section describes how to view and edit case details. Click on a Soldier name hyperlink from the Soldier Roster to open a case for viewing or editing.

NOTE: You may only add, edit, and delete data for Soldiers within your SRU, Company and/or Squad.

Standard Case Features

Every case has standard features, as shown below.

ARCS SOLDIER RECOVERY UNIT								
TESTING SITE (CUI)								
NAME	RANK	STATUS	SRU PHASE	SRU	CD	PLT	SGD	
Bach, Erick	COL	Outpatient	Veteran Track	Fort Belvoir	SRU Belvoir	HQ	Eval	
DDOID	DOB	CDR	RCC	NCM	SW	PRO	SL	
830961539	15 Aug 1978	SRU: CDR	RCC: RCC2	NCM, Belvoir 2	SRU, Social Worker 1	PSG, Belvoir HQ	SL, Belvoir Eval	
Case Summary Soldier Information Transition Tracker Assignment Soldier / Relationship Information Goal Setting / Screenings Risk Assessment Self Assessment Action Plan Appointments Care Logs Attachments Service Information CER Timeline								

Standard Case Features

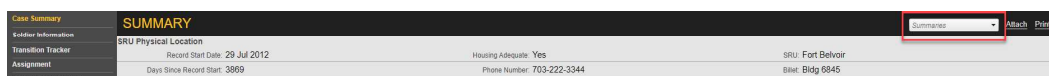
Label	Name	Description
A	Case Header	Standard header appearing on every screen that displays information about the case, including Soldier information and case assignment data.
B	Navigation Sidebar	Contains navigation hyperlinks to other sections. Click on a hyperlink to go to the selected section: • Case Summary • Soldier Information • Assignment • Transition Tracker • Soldier / Relationship Information • Goal Setting / Scrimmage • Risk Assessment • Self-Assessment • Action Plan • Appointments • Case Logs • Attachments • Service Information • Career and Education Readiness (CER)

Case Summary Screen

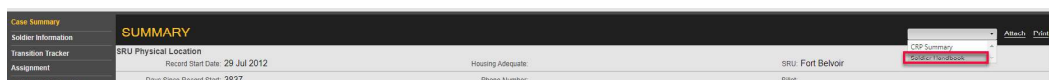
Label	Name	Description
A	Generate summaries drop-down	Click the down arrow to generate the Soldier CRP Summary Soldier Handbook, and LC Fact Sheet.
B	Attach button	Click Attach to upload a document to the case attachments.
C	Print button	Click Print to print the Case Summary page.
D	SRU Physical Location	Physical Location entered within the Soldier / Relationship Information section.
E	SRU Information	SRU ¹ Information entered within the Assignment, Risk Assessment, and Self-Assessment sections.
F	Personnel	Personnel data retrieved from IPPS-A ² .
G	DODID	Department of Defense Identification Number retrieved from IPPS-A.

Generate Soldier Handbook

To generate the Soldier Handbook, click the Summaries drop-down option at the top of the Case Summary screen.



Select the Soldier Handbook option.



¹Soldier Recovery Unit

²Integrated Personnel and Pay System - Army

A separate window will open with the Soldier's Handbook details (Comprehensive Recovery Plan (CRP) Handbook).



Comprehensive Recovery Plan (CRP) Handbook

Run on: 1/30/2023 3:35:50 PM

Soldier Name: [REDACTED]

AOC/MOS:

COMPO: ARMY RESERVE

Reason for SRU Entry: MEDVAC

Gender: Female

Wounded in Action: No

Home Address: [REDACTED]

Home Phone: [REDACTED]

Cell Phone: [REDACTED]

Duty Phone

Alternate POC:

Relationship:

Primary Phone:

Career Track	Target Transition Date	Days to TTD	Record Start Date	Days Since Record Start	SRU Report Date	Days on Station
	23 Jul 2022	-191	29 Jul 2012	3837	29 May 2010	4629

Available for Self-Assessment	Self-Assessment Frequency
Available	Every Four Weeks

Assignment History

RHC	SRU	CO	PLT	SQD	Assigned On
MRC-A	Fort Belvoir	A			24 Oct 2022
MRC-A	Fort Belvoir	SRU Belvoir			24 Oct 2022
MRC-A	Fort Belvoir	SRU Belvoir	HQ	Eval	24 Oct 2022
MRC-A	WRNMMC	B	2	2D	03 May 2021
MRC-A	WRNMMC	SRU WRNMMC			14 Dec 2021
MRC-A	WRNMMC	SRU WRNMMC	Complex Care		14 Dec 2021

Soldier Self-Assessments

Issued	Status	Work Plan	Edu	Emp	ADLs	Hlth care	Med	Pain	Wt Ctr	Phy Fit	Bhv Hlth	Well Being	Soc	Fam	Fin	Hou	Adm	Trans
05 Jan 2023	Incomplete																	
08 Dec 2022	Incomplete																	
10 Nov 2022	Incomplete																	
13 Oct 2022	Complete	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+
12 Oct 2022	Incomplete																	
14 Sep 2022	Incomplete																	
17 Aug 2022	Incomplete																	
20 Jul 2022	Incomplete																	
22 Jun 2022	Incomplete																	
25 May 2022	Incomplete	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+
04 May 2022	Incomplete																	
06 Apr 2022	Incomplete																	
09 Mar 2022	Incomplete																	
09 Feb 2022	Incomplete																	
12 Jan 2022	Incomplete																	
11 Jan 2022	Incomplete																	
14 Dec 2021	Incomplete	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+
13 Dec 2021	Incomplete																	
15 Nov 2021	Incomplete																	
18 Oct 2021	Incomplete																	
20 Sep 2021	Incomplete																	
23 Aug 2021	Incomplete																	
26 Jul 2021	Incomplete																	
28 Jun 2021	Incomplete																	
31 May 2021	Incomplete																	
03 May 2021	Incomplete																	

- 130 - CUI

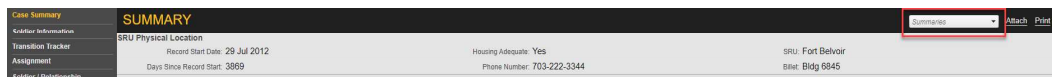
Action Items

Source	Category	Facilitator	Created On	Target Date	Status
	short dsdf	RCC, 30	04 May 2022	04 May 2022	Closed
SRU/RCC	RCC/LC Review	RCC, 30	04 May 2022	05 May 2022	In Progress

Click **Save PDF** to create a PDF of the handbook or **Close** to return to the Case Summary screen.

Generate CRP Summary

To generate the Comprehensive Recovery Plan (CRP) Handbook, click the summaries drop-down option at the top of the Case Summary screen.



Select the CRP Summary Option.



A separate window will open with the Soldier's CRP Summary details.


CRP Summary

Run on: 1/30/2023 3:55:22 PM (Local Time)

Soldier Name:

SRU: Fort Belvoir

AOC/MOS:
COMPO: ACTIVE ARMY

Gender: Female

Marital Status: Married

Wounded in Action: No

Dependents: Not AvailableNot Available

Post-separation Address:

Primary Phone:

Primary Email:

RCC Name:

RCC Phone:

RCC Email:

NCM Name: NCM, Belvoir 1

NCM Phone: 333-555-4444

NCM Email: BelvoirB_NCM@mil.gov

Target Transition Date	Record Start Date	Days Since Record Start	SRU Report Date	Days on Station
23 Jul 2022	29 Jul 2012	3837	29 May 2010	4629

Soldier Self-Assessments

Low  Moderate  High 

Issued	Status	Work Plan	Edu	Emp	ADLs	Hlth care	Med	Pain	Wt Ctrl	Phy Fit	Bhv Hlth	Well Being	Soc	Fam	Fin	Hou	Adm	Trans
13 Oct 2022	Complete																	

Action Items

Source	Category	Facilitator	Created On	Target Date	Status
SRU/RCC	RCC/LC Review	RCC, 30	04 May 2022	05 May 2022	In Progress

Challenges

Domain	Challenge	Created On
--------	-----------	------------

Action Statements

Domain	Action Statement	Date Added	Months	Status
--------	------------------	------------	--------	--------

End State (Sub Goals)

Domain	Sub Goal	Created On	Status
--------	----------	------------	--------

Click **Save PDF** to create a PDF of the summary or **Close** to return to the Case Summary screen.

Generate Soldier LC Fact Sheet

To generate the LC (Lead Coordinator) Fact Sheet , click the summaries drop-down option at the top of the Case Summary screen.

Case Summary	SUMMARY			Summary	Attach	Print
Soldier Information	SRU Physical Location					
Transition Tracker	Record Start Date: 29 Jul 2012	Housing Adequate: Yes	SRU: Fort Belvoir			
Assignment	Days Since Record Start: 3869	Phone Number: 703-222-3344	Bitel: Blg 5845			
Soldier / Relationship						

Select the LC Fact Sheet Option.

SUMMARY				Attach
SRU Physical Location	Record Start Date: 29 Jul 2012	Housing Adequate:	SRU: Fort Belvoir	CRP Summary Soldier Handbook LC Fact Sheet
Days Since Record Start: 4125	Phone Number:	Bitel:		
SRU Report Date: 29 May 2010	Cell Phone: 123-456-7890	Room Number:		
Days on Station: 4017	Home:	Address: 6476 Nancy Ave, Alexandria Virginia 22304		
ARCS In-Processing Date: 20 Dec 2019	MSA Phone:	Wounded in Action: No		

A separate window will open with the Soldier's LC Fact Sheet details.

Lead Coordinator Fact Sheet

Introduction:

Assists SM/V in better utilizing the care management system under the context of the LC

- Describes the LC role in more detail
- Is written as a one page handout that the LC can give to SM/V
- Supports what is described in the LC Script

LC Fact Sheet:

The Lead Coordinator (LC) position was developed to provide a primary point of contact for Service members and families within the recovery team. As the LC I am responsible for assisting you to develop a comprehensive plan and facilitating the needs you identify in that plan.

As your LC, I will be involved in every aspect of your care to ensure a comprehensive plan is developed in collaboration with you, your family and your recovery team. The plan will be accessible to the entire recovery team, which means your care will be coordinated in one central location to ensure a consistent high level of care. I am also responsible for interacting with the recovery team on your behalf and as appropriate with your family. If the need arises to change the LC due to changes in the level of care and/or location, I will communicate all information to the incoming LC.

As your LC, I am knowledgeable of care, benefits and services and I will ensure you and your family get the assistance you need from the appropriate expert. I will also assist members of your recovery team to help you achieve your comprehensive plan goals. I am here to ensure you and your family's voices are heard to make sure the recovery team is meeting the highest standards of care. Please feel free to contact me with any future concerns or questions you may have.

LEAD COORDINATOR NAME: SRU, RCC

CONTACT INFORMATION:

E-MAIL: SRU_RCC@TEST.COM
 WORK PHONE: 410-555-1234
 WORK CELL PHONE: 555-555-5555

Click **Save PDF** to create a PDF of the summary or **Close** to return to the Case Summary screen.

Soldier Information

Use the Soldier Information section to view Soldier information, update the Soldier's clinical status, view and edit SRU data, and view/update the Patient Acuity Type.

EDIT PERMISSIONS: Administrator, Program Analyst, and Nurse Case Manager.

Soldier Information		A	Print
Patient: BARKLE, JESSIE	Birth Date: 03 May 1977	B	C
SSN: 8091	HOR:		
Rank: SERGEANT MAJOR	Clinical Status: Outpatient	D	
Type:	SRU Phase: Complex Care	E	
MOS:	SRU Phase Date: 28 Jan 2021		
IDES/MEB Briefing Confirmation Date:	Residency: Resident	F	
IDES/MEB Briefing Confirmed By:	Purple Heart Award: No		
SCAADL		G	
Applied:	Applied Date:		
Approved:	Approved Date:		
Appealed:	Appealed Date:		
Appealed Approved:	Appealed Approved Date:		
SRU Data			
Record Start Date: 29 Jul 2012	SRU: Fort Belvoir		
Days Since Record Start: 3427	Billet:		
SRU Report Date: 29 May 2010	Room Number:		
Days on Station: 4219	Phone Number:		
ARCS In-Processing Date: 23 Apr 2015	International: ☐		
After Hours In-Processing: N/A	Cell Phone:		
Begin Complex Care: 20 Jan 2021	Initiate Exit Survey Date:	H	I
Begin RM2:	Program: CRP		J
Emergencies:			
Street: 123 Main St	Housing Adequate: N/A		
City: Testville	Zip: 12345		
State: Pennsylvania	Country: United States		
Patient Acuity Type			
Amputee: N/A			
PTSD: N/A			
TRI: N/A			

Soldier Information Screen Items

Label	Name	Description
A	Print button	Click print to print the Soldier Information page.
B	Confirm IDES/MEB Brief- ing	Data confirming the Soldier has received the IDES/MEB briefing.
C	Initiate Exit Sur- vey	Click to initiate the notification email for the SRU Exit Survey.
D	Clinical Status	Select Inpatient, out-patient, or Hospice status.
E	SRU Phase and Residency	Select the appropriate SRU Phase, Phase Date and Residency (Residency only for CC, VET, RTD).
F	Confirm IDES/MEB Brief- ing	Data confirming the Soldier has received the IDES/MEB briefing.
G	SCAADL	Manual entry of SCAADL application, approval, and appeal.
H	Begin Complex Care/RM2 Date	Set when a Soldier first enters SRU phase of Complex Care, RTD, or Veteran Track (whichever is first). Editable
I	Initiate Exit Survey Date	Date the SRU Exit Survey email was initiated.
J	Program	• Blank: Soldier has not enter RM2 nor CRP • RM2: Soldier has a begin RM2 date (is in the RM2 program) • CRP: Soldier has a begin Complex Care date (is in the Comprehensive Recovery Program)

Edit Soldier Information

EDIT PERMISSIONS: Administrator, Program Analyst, and HR Specialist.

To edit the Soldier information:

1. Click **Edit**. The Edit Soldier Information screen opens.

Soldier Information	
Patient: Bahls, Lashia	Birth Date: 03 May 1977
DDN: 5104	IIOR:
Rank: FIRST LIEUTENANT	* Clinical Status: Outpatient v SA ☐ Unavailable:
Type:	* SRU Phase: RTD Track v
MOS:	* SRU Phase Date: 16 Mar 2022 v
IDES/MEB Briefing Confirmation Date: 17 Feb 2022	* Residency: Residency... v
IDES/MEB Briefing Confirmed By: SL, Belvoir RTD1	Purple Heart Award: No v
SCAADL	
Applied: v	Applied Date: DD MM YYYY v
Approved: v	Approved Date: DD MM YYYY v
Appealed: v	Appealed Date: DD MM YYYY v
Appealed Approved: v	Appealed Approved Date: DD MM YYYY v
SRU Data	
Record Start Date: 25 Feb 2019	SRU: Fort Belvoir
Days Since Record Start: 1115	Billet:
SRU Report Date: 25 Feb 2019	Room Number:

2. Update the Soldier information.
3. Click **Save** to save the changes or **Cancel** to close the screen without saving.

Clinical Status

A Soldier's clinical status affects the Risk Assessment and self-assessment work flows in ARCS. The below table outlines how the selected clinical status affects Risk Assessment generation and self-assessment generation and availability.

Clinical Status Related Work Flow

Process	Clinical (Patient) Status Selec- ted	Risk Assess- ment	Self-assessment
<u>Off-Duty In-Processing</u>	Outpatient	Automatically gen- erated	Not generated
<u>Off-Duty In-Processing</u>	Inpatient	Not generated	Not generated
Regular In-Pro- cessing/Complete In-Pro- cessing	Outpatient	Automatically gen- erated	Not generated
Regular In-Pro- cessing/Complete In-Pro- cessing	Inpatient	Not generated	Not generated
Initial Change from Inpa- tient to Outpatient (Sol- dier was in-processed as inpatient)	Outpatient	Automatically gen- erated if no Risk Assessment has ever been com- pleted in the Sol- dier's case	Automatically generated for CRP Soldiers unless the user checks the "SA Unavailable" check box and completes the unavailable date range and reason.

Process	Clinical (Patient) Status Selected	Risk Assessment	Self-assessment
Clinical Status change on Soldier Information page	Inpatient	Risk assessments are manually generated (but not required for inpatient Soldiers)	Soldier is automatically "Unavailable for Self-assessment"
Clinical Status change on Soldier Information page	Outpatient	Risk assessments are manually generated according to policy battle rhythm	CRP Soldier is Automatically "Available" unless the user checks the "SA Unavailable" check box and completes the unavailable date range and reason.
Clinical Status change on Soldier Information page	Hospice	Risk assessments are manually generated according to policy battle rhythm	CRP Soldier is Automatically "Available" unless the user checks the "SA Unavailable" check box and completes the unavailable date range and reason.

Soldier enters Inpatient Stay

1. Select Edit on the Soldier Information page.

Soldier Information		Attach	Print
		Confirm IDES/MEB Briefing	Edit
Patient: Argenti, Kathie	Birth Date: 11 Feb 2016		
SSN: 2793	HOR:		
Rank: SERGEANT MAJOR	Clinical Status: Outpatient		
Type:	Focused Transition Review Date:		
MOS:	Purple Heart Award: No		
IDES/MEB Briefing Confirmation Date:	P3 Profile Date:		
IDES/MEB Briefing Confirmed By:	IDES/MEB Briefing Confirmed By Role:		

2. Select "Inpatient" as the Clinical Status.
3. Select **Save** on the Soldier Information page to save the changes, or **Cancel** to abandon the changes.
4. Saving will automatically change the Self-assessment Availability to "Unavailable" which will cancel any open self-assessment. See [Update Availability](#) for additional information.

Released from Inpatient Stay

Soldiers released from inpatient status require the Management Analyst, HR Specialist, or System Administrator to update clinical status.

1. Select Edit on the Soldier Information page.

The screenshot shows the "Soldier Information" page. At the top right, there are links for "Attach", "Print", "Confirm IDES/MEB Briefing", and "Edit". The "Edit" button is highlighted with a red box. The page contains the following information:

Patient: Argenti, Kathie	Birth Date: 11 Feb 2016
SSN: 2793	HOR:
Rank: SERGEANT MAJOR	Clinical Status: Inpatient
Type:	Focused Transition Review Date:
MOS:	Purple Heart Award: No
IDES/MEB Briefing Confirmation Date:	P3 Profile Date:
IDES/MEB Briefing Confirmed By:	IDES/MEB Briefing Confirmed By Role:

2. Select "Outpatient" as the Clinical Status.
3. The SA Unavailable box will be unchecked by default indicating the self-assessment process will start (skip to step 6). If the Soldier will remain Unavailable for self-assessment, check the box.
4. The Update Self-Assessment Availability pop up window will open.

Update Self-Assessment Availability

Unavailable: ☒

* Unavailable From Date: 19 Jan 2018

* Unavailable To Date: 09 Feb 2018

* Justification:

CONLM

Words: 1 Characters: 5

Note: This information will not be saved until you click "Save" on the Soldier Information panel.

Cancel Ok

5. Set the date range, enter a Justification and click OK.
6. Select **Save** on the Soldier Information page to save the changes (including availability date range), or **Cancel** to abandon the changes.

The User must Save the Soldier Information page or modifications to Clinical Status and SA Unavailable fields will be abandoned.

Soldier Roster -

All Soldiers identified as in-patient on the Soldier Information page will be listed on the Inpatients tab.

Confirm IDES/MEB Briefing

PERMISSIONS: Nurse Case Manager, Squad Leader, Platoon Sergeant, and Company Commander

To confirm:

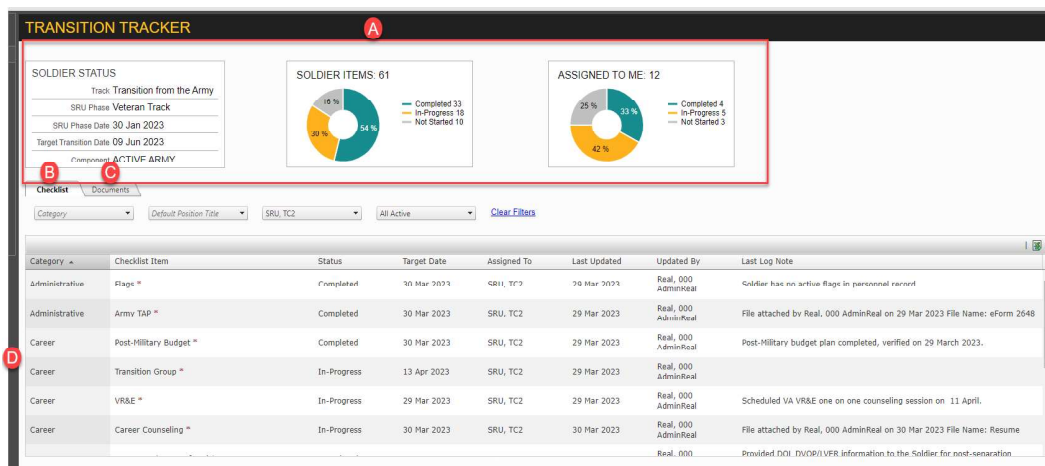
1. From the [Soldier Information](#) screen, select "**Confirm IDES/MEB Briefing**" at the top of the page.
2. Click "**OK**" to confirm the briefing, or **Cancel** to close the window without confirming.
3. Once confirmed, the following fields are automatically updated in ARCS:
 - IDES/MEB Briefing Confirmation Date
 - IDES/MEB Briefing Confirmed By (user's name)

4. Upload documentation for the briefing on the [Attachments](#) page using the "IDES/MEB Briefing" document type.

NOTE: The IDES/MEB Briefing occurs only once in a Soldier's record. After the briefing is confirmed, the link will disappear.

Transition Tracker

This section describes how to view and manage the Soldier's Transition Tracker details. The purpose of the Transition Tracker (T2) is to support the Soldier's transition to Return to Duty or Veteran status. The Tracker allows Cadre to collaborate and view the status and detail of assigned tasks.



NOTE: Dashboard view as a NCM with assigned Checklist Items.

Transition Tracker (T2) Screen

Label	Name	Description
A	Soldier Dashboards	• Soldier Status: Includes the Soldier's Track, SRU Phase, SRU Phase Date, Target Transition Date, and Component • Soldier Items: Displays the status of the all assigned Checklist Items • Assigned to Me: Displays the status of the Soldier's Checklist items that have been assigned to the user
B	Checklist	Click on the Checklist tab to view the Transition Tracker Checklist Items.
C	Documents	Click on the Documents Tab to view documents that have been uploaded to the checklist items.
D	Checklist Grid Filters	Select one or more filters from the drop down menus to change the search parameters. Click "Clear Filters" to reset the grid.
E	Core Items Check Box	Select the Core Items check box to filter by the required * 50 Checklist items.
F	View Transition Tracker Checklist	Double click on checklist item to update Item Status, Target Date, Position Title, and Assigned To. Required checklist items are noted with a *.

Checklist Overview

This section describes how to manage the Transition Tracker Checklist Items. The Checklist Items are customizable based on the Soldier's transition path and the needs of the SRU. There are a total of [78 Checklist Items](#).

Each Checklist Item has a default role but can be re-assigned based on the needs of the Soldier or SRU. The required checklist items have been identified with a *.

Checklist Documents							
Category		Default Position Title	Assigned To	All Active	☐ Core Items Clear Filters		
Category	Checklist Item	Status	Target Date	Assigned To	Last Updated	Updated By	Last Log Note
Administrative	Personal Belongings *	In-Progress	26 Jan 2024	Davis, Dan	26 Jan 2024	Real, 000 AdminReal	File attached by Real, 000 AdminReal on 26 Jan 2024 File Name: Barracks Safety Inspection
Administrative	Integrated Disability Evaluation System (IDES) *	Completed	20 Jun 2023	HR, Specialist	20 Jun 2023	Real, 000 AdminReal	File attached by Real, 000 AdminReal on 01 May 2024 File Name: MOU
Administrative	Line of Duty *	In-Progress	21 Feb 2024	NCM, Belvoir 1	21 Feb 2024	Real, 000 AdminReal	Task list item: 'Information requested from Soldier's unit', changed to 'checked' by Real, 000 AdminReal.
Administrative	DD-214 *	In-Progress	31 Jan 2024	NCM, Belvoir 1	31 Jan 2024	Real, 000 AdminReal	File attached by Real, 000 AdminReal on 30 Apr 2024 File Name: Activity Clearance Form (ACF)
Administrative	Managing Remaining Leave *	Completed	20 Jun 2023	_CDR, Bel_BN	20 Jun 2023	Real, 000 AdminReal	Item assigned to _CDR, Bel_BN by Real, 000 AdminReal

Note: The 'Updated By' column will populate with the users name that first goes into the Soldier's Transition Tracker page.

Filter Checklist

The Checklist Items can be filtered by role, assignment, category, and/or status. The grid can be filtered in more than one area.

Checklist Documents							
Category		Default Position Title	Assigned To	All Active	☐ Core Items Clear Filters		
Category	Checklist Item	Status	Target Date	Assigned To	Last Updated	Updated By	Last Log Note
Administrative	Benefits Counseling (VBA)	Completed	27 Apr 2023	RCC, RCC2	27 Apr 2023	Real, 000 AdminReal	Soldier attended Veteran's Benefits Administration (VBA) Counseling Brief on 3/28/2023.
Administrative	Flags	Completed	30 Mar 2023	SRU, TC2	29 Mar 2023	Real, 000 AdminReal	Soldier has no active flags in personnel record

Filtering the Checklist

Label	Name	Description
A	Category	Chose this option to filter by category. The options include: • All • Administrative • Career • Family Care • Finances • Health • Legal • Quality of Life
B	Default Position Title	Chose this option to filter by the recommended default position. The options include: • All • Recovery Care Coordinator • Company Commander • HR Specialist • Nurse Case Manager • Occupational Therapist • Physical Therapist • Social Worker • Squad Leader • Transition Coordinator
C	Assigned to	Chose this option to filter by the assigned to Cadre.

Label	Name	Description
D	Status	Chose this option to filter by status. The options include: • All Active • All Items • Completed • In-Progress • Not Applicable • Not Started <i>The default view is All Active.</i>

Note: After Checklist Items have been assigned to users or marked as not-applicable, the default view on the grid will be all-active tasks assigned to the user.

Manage Checklist

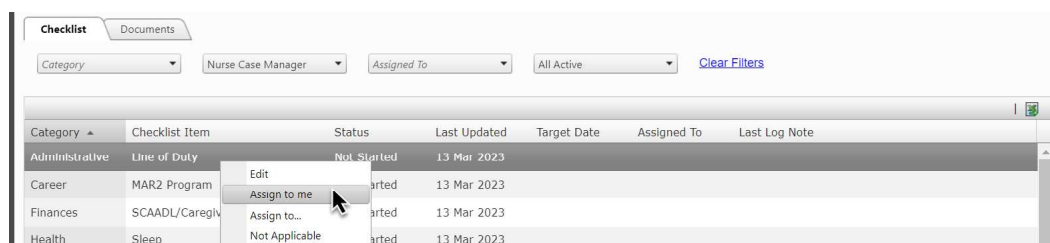
This section describes how to assign, remove, or reinstate Checklist Items.

Assign Checklist Item

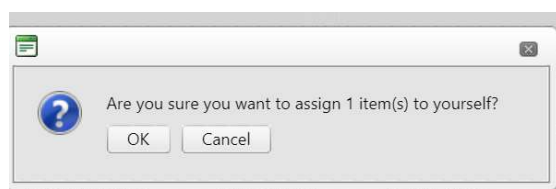
This section describes how to assign the Checklist Items to yourself or Cadre in the Soldier's SRU.

To assign a checklist item to yourself:

1. Right click on item
2. Select **Assign to me**

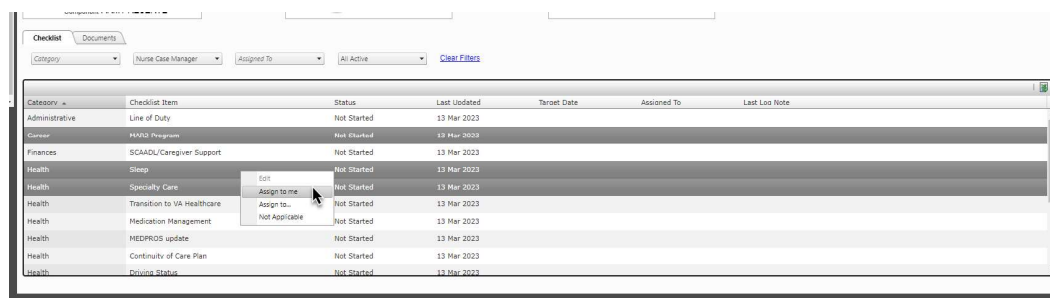


3. Select **OK**

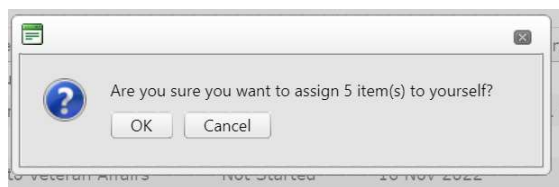


To assign more than one checklist item to yourself:

1. Hold down shift on the keyboard and select the checklist items
2. Right click
3. Select **Assign to me**

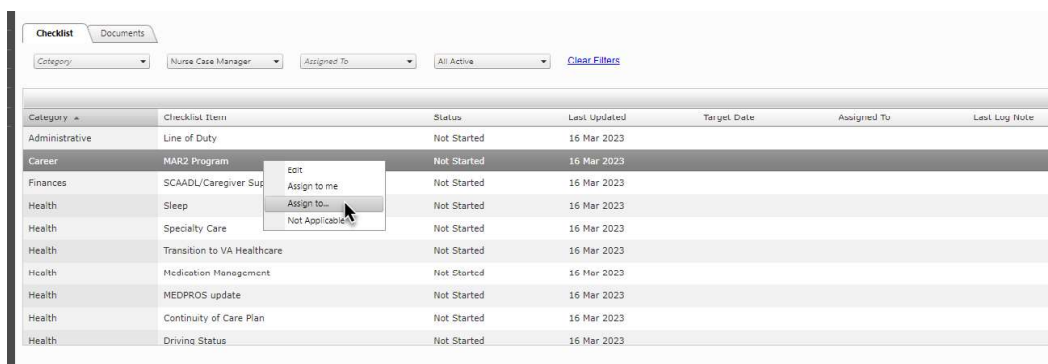


4. Select **OK**



To assign a checklist item to Cadre:

1. Right Click on the Item



2. Select **Assign to...**

3. Select the **Position Title**

4. Select the **Facilitator**

- The Cadre in the assigned SRU will populate in the drop-down

5. Click Hit **Submit**

To assign more than one checklist item to Cadre:

1. Hold down shift on the keyboard and select the checklist items
2. Right click
3. Select **Assign to...**

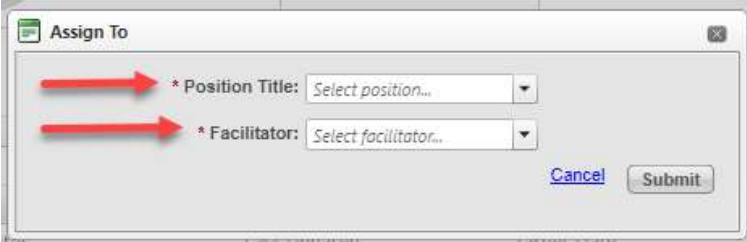
Checklist		Documents				
Category		Nurse Case Manager		Assigned To		All Active
						Clear Filters
Category	Checklist Item	Status	Last Updated	Target Date	Assigned To	Last Log Note
Administrative	Line of Duty	Not Started	16 Mar 2023			
Career	WAGG Program	Not Started	16 Mar 2023			
Finances	SCANDL/Care	Not Started	16 Mar 2023			
Health	Sleep	Not Started	16 Mar 2023			
Health	Specialty Care	Not Started	16 Mar 2023			
Health	Transition to US Healthcare	Not Started	16 Mar 2023			
Health	Medication Management	Not Started	16 Mar 2023			
Health	Insurance update	Not Started	16 Mar 2023			
Health	Continuity of Care Plan	Not Started	16 Mar 2023			
Health	Driving Status	Not Started	16 Mar 2023			

4. Select the **Position Title**

5. Select the **Facilitator**

- The Cadre in the assigned SRU will populate in the drop-down

6. Click Hit **Submit**



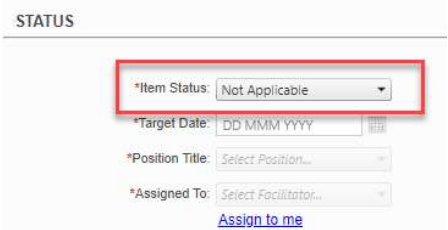
The image shows a dialog box titled "Assign To". It contains two dropdown menus: "* Position Title:" with the text "Select position..." and "* Facilitator:" with the text "Select facilitator...". Two red arrows point to these dropdown menus. At the bottom right of the dialog are "Cancel" and "Submit" buttons. Below the dialog, parts of a table with headers "Last Updated" and "Target Date" are visible.

Remove a Checklist Item

This section describes how to remove the Checklist Items from the list.

To mark a checklist item as **Not Applicable**:

1. Double click on the checklist item
2. Update the status to **Not Applicable**

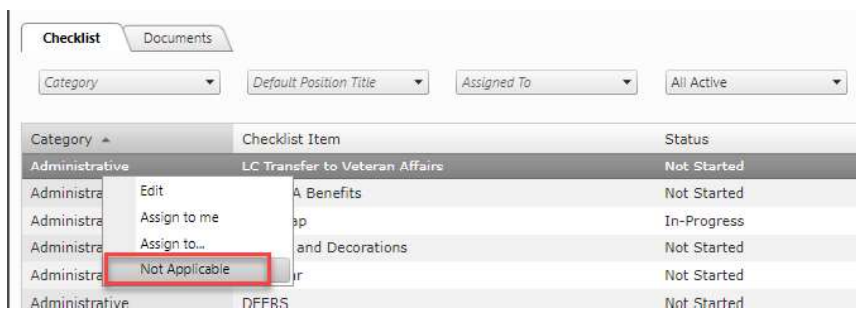


The image shows a form titled "STATUS". It contains several fields: "*Item Status:" with a dropdown menu showing "Not Applicable" (this field is highlighted with a red rectangle), "*Target Date:" with a date input field showing "DD MMM YYYY", "*Position Title:" with a dropdown menu showing "Select Position...", and "*Assigned To:" with a dropdown menu showing "Select Facilitator...". Below the "*Assigned To:" field is a blue link that says "Assign to me".

3. Select Continue

OR

1. Right Click on checklist item
2. Select **Not Applicable**

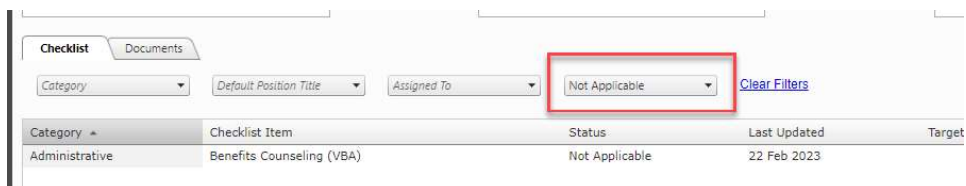


To update a more than one statuses to Not Applicable:

1. Hold down shift on the keyboard and select the checklist items
2. Right click
3. Select **Not Applicable**

After a checklist item has been marked as **Not Applicable**, the item will disappear from the grid.

To view all checklist items that have been marked as Not Applicable, select the **Not Applicable** drop-down choice on the grid filter.

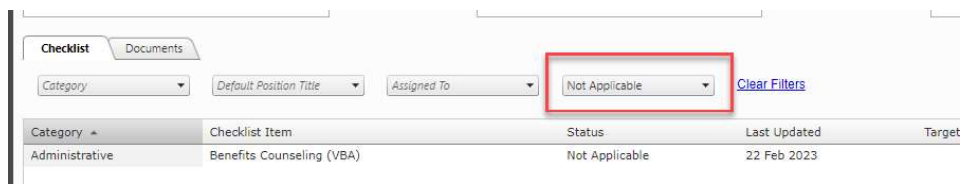


A Not Applicable Checklist Item can be reinstated to in-progress or completed, if needed. [Reinstate Checklist Item](#) directions can be found here.

Reinstate Checklist Item

If a Checklist Item was previously marked as Not Applicable the item can be reinstated, if needed.

To view the checklist items that are marked as Not Applicable, select the **Not Applicable** filter on the grid.



To Recover Not Applicable Items:

1. Right click on the item that needs to be reinstated
2. Select **Not Started** to update the status
3. Assign the item to cadre or yourself, as applicable.

Manage Checklist Items

This section describes how to update a Checklist Item after the item has been assigned to Cadre. Checklist items will remain in the Not-Started status until they are marked as In-Progress or Completed.

In-Progress Checklist Items

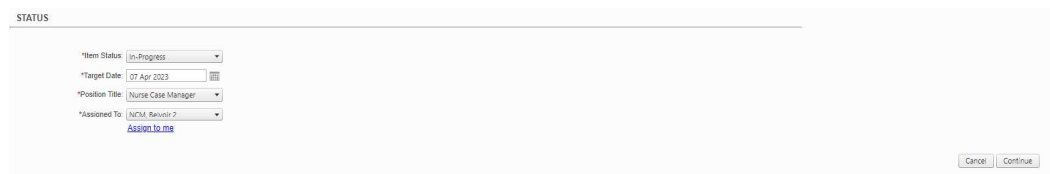
This section describes how to update a Checklist Item to **In-Progress**.

To mark a checklist item as **In-Progress**:

1. Double click on the checklist item.
2. Update the status to **In-Progress**.
3. Add Target Date
4. Confirm Position Title and Assigned To are correct

- If the Position Title or Assigned To need to be updated, please update at this step.

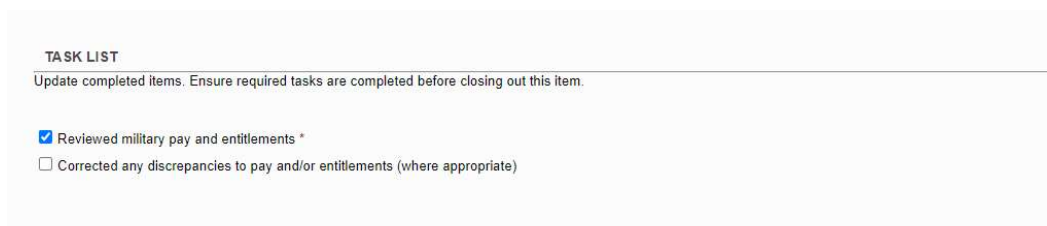
5. Select Continue



6. Proceed to updating the [Update Task List](#), [Add Checklist Item Log Note](#), or [Add Checklist Attachment](#) (if applicable).
7. Select Save & Close to update the status to **In-Progress** or cancel to close the window without updating the status.
-

Update Task List

The Tasks List items provides tasks that are associated with the Checklist item.



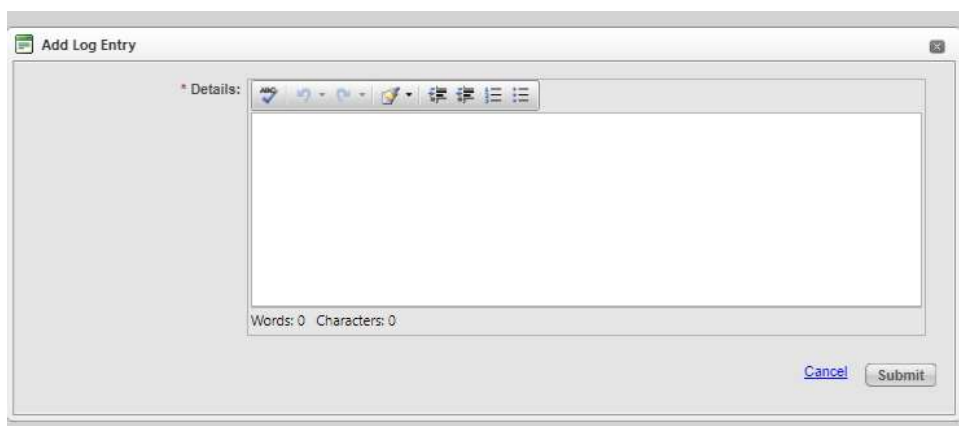
To update the task list, select the check box(s) for all completed Task List Items (if applicable).

Add Checklist Item Log Note

Use the log notes section to manage log entries for a specific checklist item. Log note entries will be automatically added. They also can be manually added to document activities relevant to the Transition Tracker Checklist Item.

To add a log note entry to the Checklist Item:

1. Click the Add icon .
2. The Add Log Entry dialog box opens.



3. Enter comments for the log entry in the Comments field.
4. Click **Submit** to add the log entry or click **Cancel** to close the dialog box without saving.

The last log note can be found on the Transition Tracker home page grid.

Checklist Documents						
Category	Default Position Title	NCM, Belvoir 2	(All Active)	Clear Filters		
Category	Checklist Item	Status	Last Updated	Target Date	Assigned To	Last Log Note
Career	HA&2 Program	In-Progress	23 Feb 2023	14 Apr 2023	NCM, Belvoir 2	
Health	Continuity of Care Plan	In-Progress	23 Feb 2023	17 May 2023	NCM, Belvoir 2	
Health	Driving Status	Not Started	23 Feb 2023		NCM, Belvoir 2	
Health	Medication Management	Not Started	23 Feb 2023		NCM, Belvoir 2	
Health	Pain Management Plan	In-Progress	23 Feb 2023	20 Mar 2023	NCM, Belvoir 2	
Health	PDHA/POHRA	Not Started	23 Feb 2023		NCM, Belvoir 2	
Health	Sleep	Completed	23 Feb 2023	23 Feb 2023	NCM, Belvoir 2	
Health	Transition to VA Healthcare	In-Progress	23 Feb 2023	07 Jul 2023	NCM, Belvoir 2	
Legal	Medical POA/Advanced Directive	Not Started	23 Feb 2023		NCM, Belvoir 2	

Set-Up Initial Sleep and Snoring Apnea Treatment Appointment on 2/1.

NOTE: Manually adding a log note will add a case log entry to the Soldier's Case Logs page.

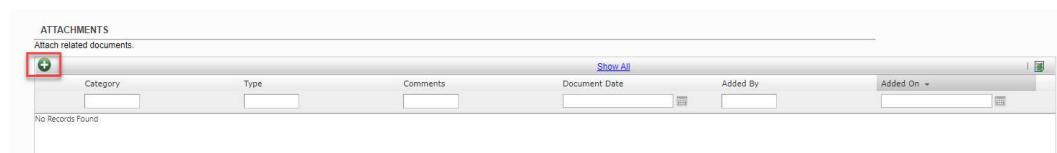
Log Notes are Automatically Added When:

- When a task has been assigned to a user
- When a task has been re-assigned to a user
- When a status has been marked as 'Not Applicable'
- When a status has been marked as 'In-Progress'
- When a status has been marked as 'Complete'
- When a status has been marked from 'Not Applicable' to 'Not Started'
- When the target date has been set
- When the target date has been updated
- When a document has been attached to the checklist item

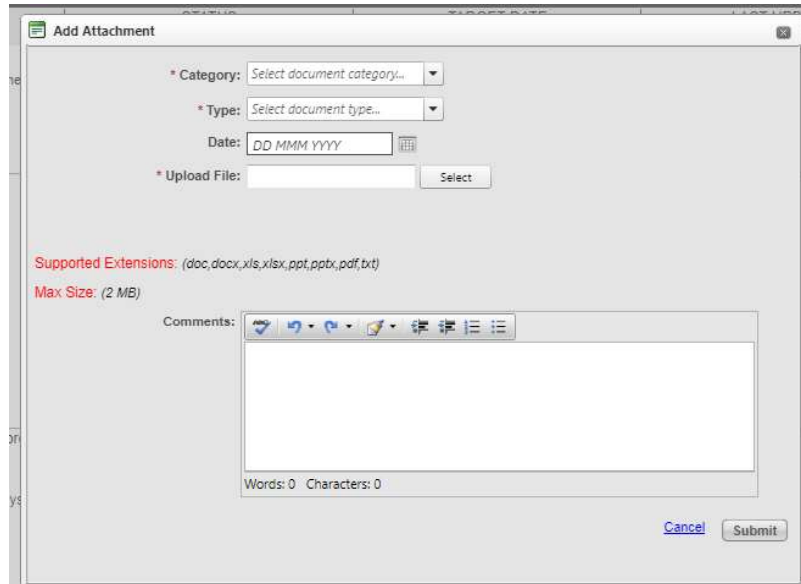
Add Checklist Attachment

To add an attachment to the checklist item:

1. Click the Add icon  above the Attachments table.



2. The Add Attachment window opens.



3. Enter information for all required fields. Required fields are marked with an asterisk (*).
4. Select a file and then click Open. When the file is done uploading, the circle icon will turn green.
5. If the wrong file is selected, select Remove.
6. Click Submit to add the attachment or Cancel to close the window without saving.

The documents can be viewed in the Transition Tracker [Documents Tab](#).

NOTE: Attachments added in the Transition Tracker will also be shown in the Case Attachment List and the Case Logs on the Soldier's page. They can also be viewed on the Transition Tracker Checklist Documents Tab.

Documents Tab

Use the Documents Tab to view attachments attached to a specific Checklist Item. This allows users to track and view information related to the Soldier's Transition Tracker.

Checklist Category	Checklist Item	Document Category	Document Type	Comments	Document Date	Added By	Added On
Career	Career Counseling	CER/Transition	Resume	Resume	30 Mar 2023	Real, 000 AdminReal	30 Mar 2023
Administrative	DD-214	Admin/Counseling	DD214	DD214	30 Mar 2023	Real, 000 AdminReal	30 Mar 2023
Administrative	Army TAP	CER/Transition	eForm 2648	DD2648	29 Mar 2023	Real, 000 AdminReal	29 Mar 2023

Transition Tracker Attachments Tab Items

Label	Name	Description
A	Download Attachment	Click the Download Attachment Icon to download the attachment document.
B	View hyperlink	Click the View hyperlink to view the Checklist attachment details
C	Delete icon	Click the Delete icon to delete the attachment

NOTE: Attachments added through the Transition Tracker Checklists will also be shown in the case attachment list and the case attachments

After an attachment is deleted, the attachment will be removed from the Soldier's Transition Tracker Checklist Item, the documents tab in the Transition tracker, and the attachments page on the Soldier's case.

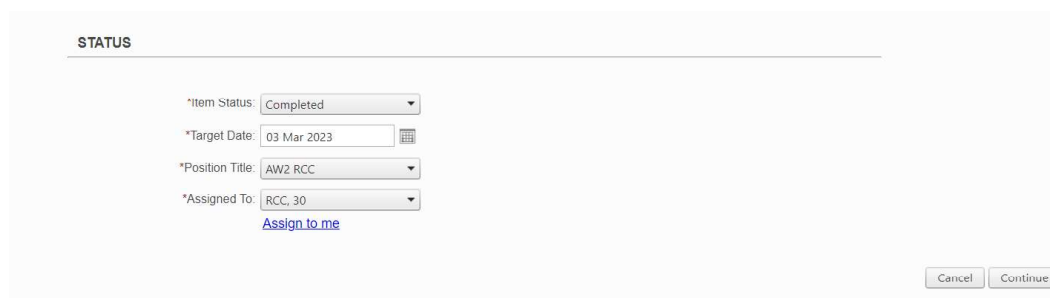
Completed Checklist Items

This section describes how to update a Checklist Item to **Completed**.

To mark a checklist item as **Completed**:

1. Double click on the checklist item.
2. Update the status to **Completed**.

3. Add Target Date (date the checklist item was completed).
4. Confirm Position Title and Assigned To are correct
 - If the Position Title or Assigned To need to be updated, please update at this step.
5. Select Continue



6. Proceed to updating the [Update Task List](#), [Add Checklist Item Log Note](#), or [Add Checklist Attachment](#) (if applicable).
7. Select Save & Close to update the status to **Completed** or cancel to close the window without updating the status.

Transition Tracker Dashboard

The Transition Coordinator Dashboard displays the progress of the Transition Tracker Checklist Items associated with the Soldier. The view of the dashboard details will vary based on the default role of the user.

1. **Role Specific Dashboard**
 - This dashboard displays Checklist Items assigned to the user.
 - It displays Soldiers that are in the CRP program
 - It displays Soldiers with a Target date of less than 60 days.

- Roles Include: Nurse Case Manager, Occupational Therapist, Recovery Care Coordinator, Social Worker, Squad Leader, and Transition Coordinator

Soldier Transition Tracker (T2) Overview (Within 60 days)					
Soldier Name	Target Transition Date	Not Started	In-Progress	Completed	
Argenti, Kathie	01 Mar 2020	2	2	3 (42.86%)	▲
Delgado, Sean	27 Jul 2021	3	3	8 (57.14%)	
Schronce, Cherie	18 Sep 2021	5	2	4 (36.36%)	
Munoz, Tami	28 Oct 2021	0	1	5 (83.33%)	
Enote, Lashonda	25 Nov 2021	3	1	4 (50.00%)	
Palmer, Roderick	24 Mar 2022	0	0	0 (0%)	
Brzostowski, Vivian	09 Oct 2022	0	0	0 (0%)	
Amaral, Ramon	01 Nov 2022	6	1	3 (30.00%)	
Mahmud, William	28 Nov 2022	13	3	1 (5.88%)	
Daulton, Rosalyn	01 Dec 2022	7	2	0 (0%)	▼

2. View All Dashboard

- This dashboard displays the status of all Checklist Items assigned to the Soldiers within the SRU of the user.
- It displays Soldiers with a Target date of less than 60 days.
- Role Include: Battalion Commander, Company Commander, SRU Leadership, Social Service Assistant, Program Analyst, Platoon Sergeant, and HR Spe-

cialist

Soldier Transition Tracker (T2) Overview (Within 60 days)				
Soldier Name	Target Transition Date	SRU Phase	Not Started	Completed
Bach, Erick	01 May 2023	Veteran Track	12	34 (72.34%)
Schartz, Robin	04 May 2023	Complex Care	10	5 (33.33%)
Bertrand, Tracy	05 May 2023	Complex Care	0	2 (100.00%)
Ruiz, Jan	06 May 2023	Complex Care	21	7 (25.00%)
		Complex		

Launch the Soldier's [Transition Tracker](#) home page by clicking on the Soldier's name hyper-link.

Assignment

Use the Assignment screen to view and edit Role Assignment details, manage injury information and view the case history.

NOTE: Some options on this screen may be unavailable, depending on your role.

Assignment D Print

Edit Transfer

Main Data B

A Case Status: Active Future Duty:

Status Date: 26 Nov 2020 Company: SRU Belvoir

RHC: RHC-A Platoon: VET

SRU: Fort Belvoir Squad: 2nd

Role Assignment

CDR: SRU, CDR	Phone: 555-111-2222
SRMM: SRU, PCM2	Phone: 123-555-8989
NCM: NCM, Belvoir 2	Phone: N/A
SW: SRU, SW 2	Phone: 333-666-9999
OT: OT, Belvoir	Phone: 123-456-7890
TC: CER_TC, CER_TC	Phone: 666-555-4444
PSG: Davis, Dan	Phone: N/A
SL: SL, Belvoir VET2	Phone: 555-555-5555
RCC: SRU, RCC	Phone: 410-555-1234

Assignment Data Page

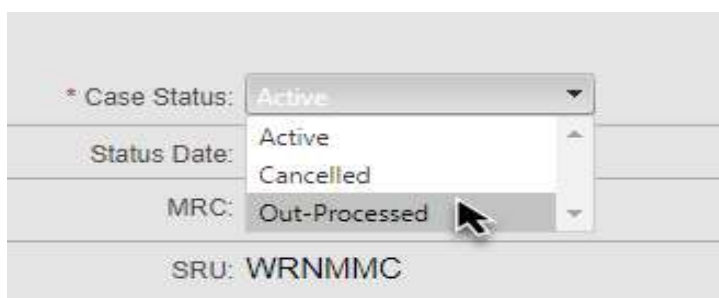
Label	Name	Description
A	Main Data tab	Use this tab to view case data. Additionally, you can: - Manage assignments - Transfer the case
B	History tab	Use this tab to view the case assignment history
C	Transfer button	Click Transfer to transfer the case to another SRU or company
D	Print button	Click Print to print the Main Data tab
E	Edit button	Click Edit to edit the case assignment information

Edit Assignment

PERMISSIONS: Program Analyst, HR Specialist, Administrator

To manage assignments for an individual Soldier within a Company on the Main Data tab:

1. Click **Edit** in the Soldier's assignment tab. The Edit Assignment screen opens.



The screenshot shows a form with the following fields:

- * Case Status: Active (dropdown menu open showing Active, Cancelled, Out-Processed)
- Status Date: Active
- MRC: Out-Processed
- SRU: WRNMMC

2. Select a platoon and squad for the Soldier using the list boxes if applicable.
3. Update Role Assignment information using the list boxes.
4. If Action Plans assigned to losing Cadre should not be re-assigned to the gaining Cadre, de-select the "Reassign Action Plans" check box.

NOTE: The RCC information is read-only. This data is imported from the RCD module if the Soldier is eligible for the program.

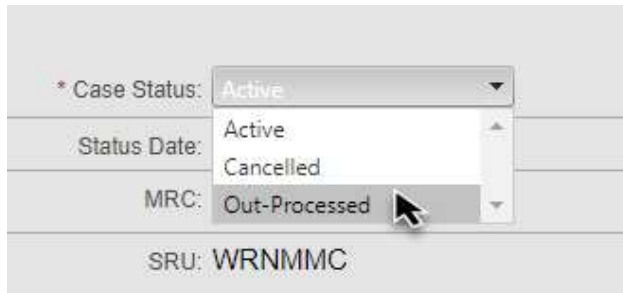
4. Click **Save** to save the changes or **Cancel** to return to the Main Data tab without saving.

Assignment History

Assignment History tracks changes in cadre throughout the Soldier's case history. This page is read only.

- 162 - CUI

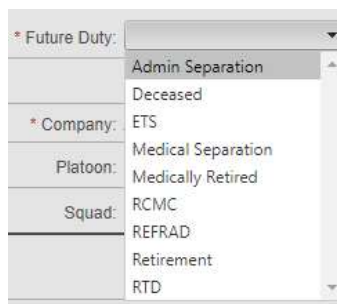
1. Go to the Soldier Roster.
2. Click on a Name hyperlink to open the case.
3. Verify that there is an address, phone number, and email address for the Soldier.
4. Click **Assignment** from the Navigation Sidebar.
5. On the Main Data tab, click the Edit button.
6. Select Out-Processed from the Case Status list box.



A screenshot of a web form showing a dropdown menu for 'Case Status'. The dropdown is open, displaying three options: 'Active', 'Cancelled', and 'Out-Processed'. A mouse cursor is pointing at 'Out-Processed'. Below the dropdown, the text 'SRU: WRNMMC' is visible.

7. Select the Soldier's future duty in the Future Duty field.
8. Add a Program End Date that matches the Soldier's orders or DD214.

NOTE: Cases out-processed with the Medically Retired, Medical Separation, or Retirement Future Duty code will automatically have an RCD case created and routed for screening if one does not exist.



A screenshot of a web form showing a dropdown menu for 'Future Duty'. The dropdown is open, displaying a list of options: 'Admin Separation', 'Deceased', 'ETS', 'Medical Separation', 'Medically Retired', 'RCMC', 'REFRAD', 'Retirement', and 'RTD'. A mouse cursor is pointing at 'Admin Separation'.

NOTE: For COMPO 2/3 Soldiers, if RTD is selected, a warning message will display. Typically COMPO 2/3 Soldiers are REFRAD rather than RTD.

9. Click **Save**.

NOTE: If you out-process a case in error or need to make additional changes, contact the ARCS Service Desk.

New Case (Soldier returning to SRU program)

NOTE: To reopen a case closed in error, contact the ARCS Service Desk.

PERMISSIONS: Administrator, Program Analyst, HR Specialist, or On-Call User

Using the New Case link in an Out-Processed record creates a case with a new case ID, but the Soldier and Relationship Contact information will be pulled from the existing case record.

1. Search for the closed case (status set to Cancelled or Out-Processed).
2. Click on a name hyperlink to view the case.
3. Click **Assignment** from the Navigation Sidebar.

The screenshot shows the SRU system interface. On the left is a navigation sidebar with links: Case Summary, Soldier Information, Assignment (highlighted with a red box), Soldier / Relationship Information, Goal Setting / Scrimmage, Risk Assessment, and Self-Assessment. The main content area is titled 'Out-Processed' and 'Assignment'. It has tabs for 'Main Data' and 'History'. The 'Main Data' tab is active, showing case details: Case Status: Out-Processed, Status Date: 02 May 2016, Future Duty: RTD, Company: B, Platoon: 1, and Squad: . A 'New Case' link is circled in red in the top right corner of the main data area. A 'Print' link is also visible in the top right.

4. On the Main Data tab, click the **New Case** link.
5. The In-process screen will open.
6. [Complete Soldier In-Processing](#) or perform [Off-Duty In-Process](#).

Soldier / Relationship Information

NOTE: Soldier and Relationship contact information is shared with the other ARCS modules if the Soldier has a corresponding case.

Use the Soldier / Relationship Information screen to update Soldier contact information and manage additional contacts for the Soldier.

Soldier Contacts Tab

Use the Soldier Contacts tab to manage the Soldier's contact information.

Soldier/Relationship Information Print

Soldier Contacts Relationship Contacts A

Soldier Contact Information

Address B +

Page size: 25 Page 1 of 1, rows 1 to 2 of 2

Update	Purpose Code	Address	Added By	Updated By	Updated On	Delete
C	Physical Address, Current Residence	1234 Main St Centerville, FL 12345 United States	SRU	SRU: Real, 000 AdminReal	29 Sep 2022	D
	Physical Address	123 123, IN 12345 United States	RCD	RCD: advocate2, aw2	23 Feb 2017	

Phone E +

Page size: 25 Page 1 of 1, rows 1 to 1 of 1

Primary	Type	System Code	Number	Ext	Added By	Updated By	Updated On	Remove
F	Cell	NONE	1234567890		SRU	SRU: Real, 000 AdminReal	29 Sep 2022	G

Email H +

Page size: 25 Page 1 of 1, rows 1 to 1 of 1

Primary	Email Address	Added By	Updated By	Updated On	Remove
I	fasdfasd@yahoo.com	SRU	SRU: _25, MA01_Polk	08 Dec 2020	J

The following table describes the items labeled in the Soldier Contact Tab:

Soldier Contact Tab Items

Label	Name	Description
A	Relationship Contacts Tab	Click this tab to switch to viewing the Soldier's relationship contacts.
B	Add Address icon	Click the Add icon to add address information
C	Edit Address icon	Click the Edit icon to edit address information
D	Delete Address icon	Click the Delete icon to delete address information. Deleting addresses from other modules will hide the address from the current module only.
E	Add Phone Number icon	Click the Add icon to add a phone number
F	Primary Phone	The green circle indicates the Soldier's Primary Phone Number
G	Remove Phone Number icon	Click the Remove icon to remove a phone number from the current module
H	Add Email Address icon	Click the Add icon to add an email address
I	Primary Email	The green circle indicates the Soldier's Primary Email Address
J	Remove Email Address icon	Click the Remove icon to remove an email address from the current module

Relationship Contacts Tab

Use the Relationship Contacts tab to manage the Soldier's Personal and Professional relationship contacts. Not all users can add or update Relationship contacts.

Soldier Contacts

Relationship Contacts

Relationship Contacts

A

Name	Relationship	Affiliation	Organization	NOK Designation	Guardian	Power of Attorney	Source	Delete
Straight, Roger	Brother				No	No	WTU	C
Smith, Mike	Non-Medical Attendant			Primary Point of Contact	No	No	WTU	

Relationship Contacts

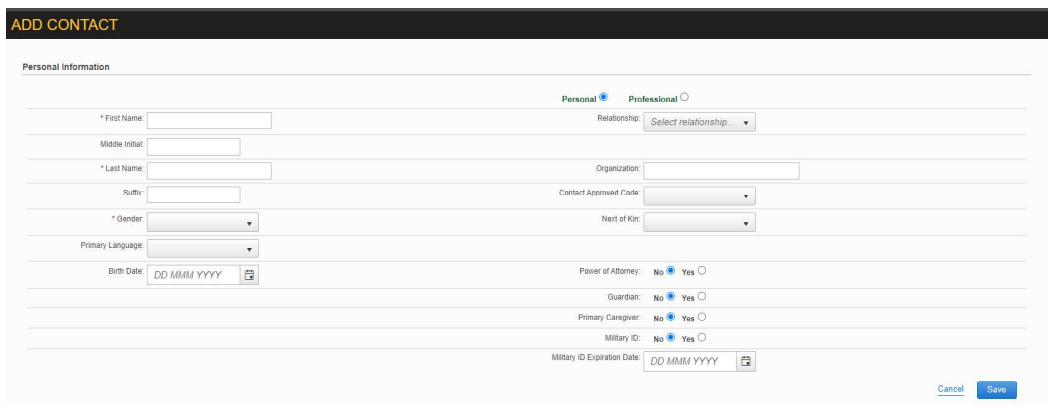
Label	Name	Description
A	Add Relationship Contact icon	Click the Add icon to add a new relationship contact
B	Contact Name hyperlink	Click a contact name hyperlink to view details for a relationship contact
C	Delete Relationship Contact icon	Click the Delete icon to delete a relationship contact

Related Topic: [Manage Soldier and Relationship Contact Information](#)

Add Relationship Contact

To add a relationship contact:

1. Click the Add icon . The Add Contact window opens.



2. Select either the Personal or Professional option.

ADD CONTACT

Personal Information

Personal ☒ Professional ☐

* First Name:

Middle Initial:

* Last Name:

Suffix:

Gender:

Relationship:

Organization:

Contact Approval Code:

Next of Kin:

NOTE: If you select “Professional,” you must select an affiliation. If you select “Personal,” you must select a relationship.

3. Enter information for all required fields. Required fields are marked with an asterisk (*).

NOTE: A Soldier can only have one contact with a Primary Caregiver designation (for Personal contacts).

4. Click **Save** to save the relationship contact or **Cancel** to close the window without saving.

View Relationship Contact

To view details for a relationship contact, click the contact name hyperlink from the Name column.

Relationship Contact Details

Label	Name	Description
A	Back hyperlink	Click Back to return to the Relationship Contacts tab.
B	Edit button	Click Edit to edit relationship contact details
C	Add Address button	Click the Add icon to add address information
D	Edit Address icon	Click the Edit icon to edit address information
E	Delete Address icon	Click the Delete icon to delete address information
F	Add Phone Number icon	Click the Add icon to add a phone number
G	Primary Contact icon	A primary email or phone number is indicated with the green circle.
H	Remove Phone Number icon	Click the Remove icon to hide a phone number
I	Add Email Address icon	Click the Add icon to add an email address
J	Remove Email Address icon	Click the Remove icon to edit an email address

Edit Relationship Contact Details

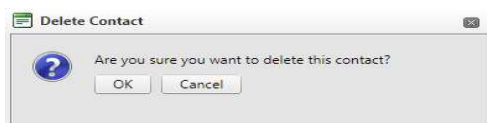
To edit a relationship contact:

1. Click the Edit button from the [Relationship Contact Details](#) screen.
2. The Edit Contact window opens.
3. Update the contact information.
4. Click **Save** to save the changes or **Cancel** to close the window without saving.

Delete Relationship Contact

To delete a relationship contact:

1. Click the Delete icon .
2. The Delete Contact dialog box opens.



3. Click **Delete** to delete the contact, or **Cancel** to close the dialog box without deleting.

Deleting a Relationship Contact from another module will "hide" the contact from the current module, but will not affect any other modules.

Manage Soldier and Relationship Contact Information

PERMISSIONS: Program Analyst, HR Specialist, Administrator, Squad Leader, Platoon Sergeant, RCC, Nurse Case Manager, Social Worker and Social Service Representative

The following sections describe how to manage [address](#), [phone number](#), and [email](#) information for the Soldier and any Relationship Contacts.

Add Address

To add an address:

1. Click the Add icon  under Address.
2. The Add Address window opens.

3. Select one or more Purpose Codes (address type) using the drop down list. Ctrl + click to select multiple Purpose Codes.

NOTE: Each Purpose Code may only be used for one address record per contact.

4. Enter address information. Required fields are marked with an asterisk (*).
5. Click **Save** to save the new address or **Cancel** to close the window without saving.

Edit Address

To edit an address:

1. Click the Edit icon  next to the address.
2. The Edit Address window opens.

3. Add or remove purpose codes using the picklist.
4. Make changes to the address.
5. Click **Save** to save the changes or **Cancel** to close the window without saving.

NOTE: User can only edit addresses from the active module.

Delete Address

To delete an address:

1. Click the **Delete** icon  to the right of the address.
2. The Delete Address dialog box opens.

3. Click **Delete** to delete the address or **Cancel** to close the dialog box without deleting.

NOTE: This action cannot be undone.

Hide Address (other modules)

Users with edit permissions may remove addresses added from other modules. This prevents duplicate or outdated addresses from remaining visible within a case record.

Addresses will only be hidden from the active module.

The example here from the SRU module:

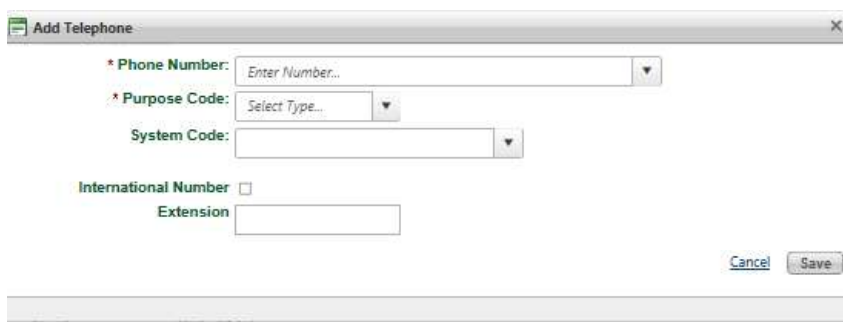
- Address Added By RCD module - trash can icon will **HIDE** the address from the SRU module only
- Address Added By SRU (active) module - trash can icon will **DELETE** the address

Soldier Contact Information						
Address						
       Page size: 25 Page 1 of 1, rows 1 to 2 of 2						
Update	Purpose Code	Address	Added By	Updated By	Updated On	Delete
	Physical Address	1523 Main st Testville, VT 30245 United States	AW2	AW2: Real, 000 AdminReal	28 Dec 2020	
	Physical Address	123 Main Street Fairfax, VA 20190 United States	WTU	WTU: Admin, Administrator	28 Jul 2011	

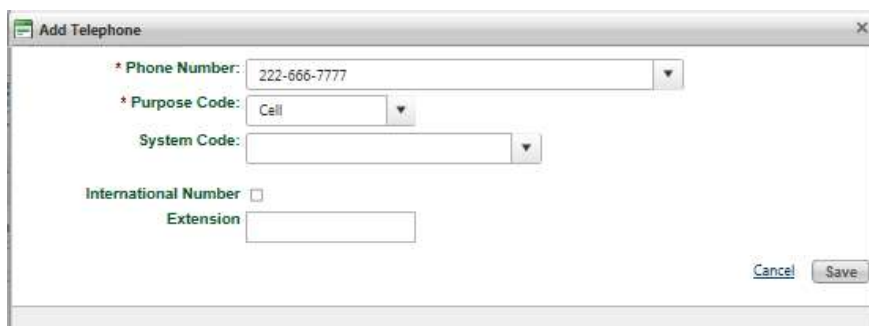
Add Phone Number

To add a phone number:

1. Click the Add icon .
2. The Add Telephone window opens.



3. Select a phone number from the drop down, or enter a new phone number. The drop down will contain any phone number associated with the person's profile that was previously removed from the current module.
4. Select a Purpose Code (required) and add any other needed information.



5. Click **Save** to save the phone number or **Cancel** to close the window without saving.

Remove Phone Number

To remove a phone number from view in the current ARCS module:

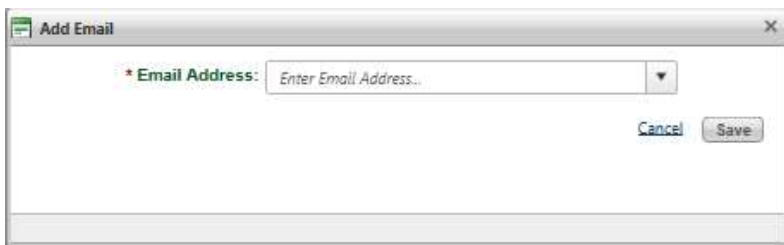
1. Click the Remove icon  to the right of the phone number.

NOTE: Removing a phone number from view will not delete it permanently. To bring a hidden phone number back, see [Add Phone Number](#).

Add Email Address

To add an email address:

1. Click the Add icon .
2. The Add Email window opens.



3. Select an email address from the drop down, or enter a new email address. The drop down will contain any email address associated with the person's profile that was previously removed from the current module.



4. Click **Save** to save the email address or **Cancel** to close the window without saving.

Remove Email Address

To remove an email address from the current ARCS module:

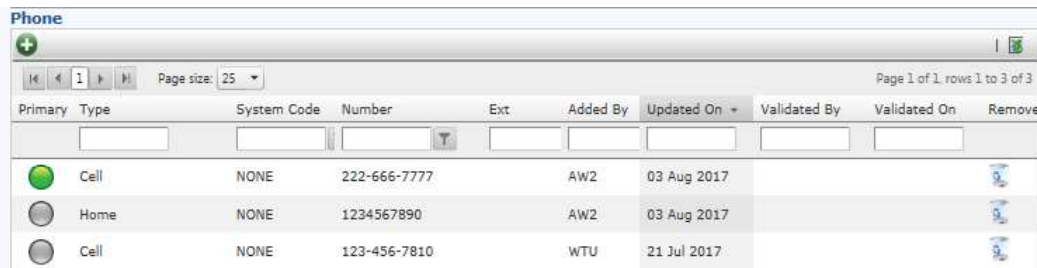
1. Click the Remove icon  to the right of the email address.

NOTE: Removing an email address from view will not delete it permanently. To bring a hidden email back, see [Add Email Address](#).

Primary Contact

One primary phone number and one primary email address may be identified for a Soldier or relationship contact in each ARCS module.

To mark a phone number or email as primary, click the circle in the "Primary" column. A green circle indicates primary status.



The screenshot shows a web application window titled "Phone" with a green plus icon in the top left. Below the title bar is a navigation bar with a "Page size: 25" dropdown and a "Page 1 of 1, rows 1 to 3 of 3" indicator. The main content area is a table with the following columns: Primary, Type, System Code, Number, Ext., Added By, Updated On, Validated By, Validated On, and Remove. The first row is highlighted, and the "Primary" column contains a green circle. The second and third rows have grey circles in the "Primary" column.

Primary	Type	System Code	Number	Ext.	Added By	Updated On	Validated By	Validated On	Remove
	Cell	NONE	222-666-7777		AW2	03 Aug 2017			
	Home	NONE	1234567890		AW2	03 Aug 2017			
	Cell	NONE	123-456-7810		WTU	21 Jul 2017			

Remove the primary indicator by selecting another email or phone number on the grid, or click the green circle to deselect.

Goal Setting / Scrimmage

Use the Goal Setting / Scrimmage screen to manage Challenges, Action Statements, Goals, Scrimmage Details, and Scrimmage Worksheets.

NOTE: The Goal Setting / Scrimmage screen cannot be accessed until [Phase One Goal Setting](#) has been completed.

GOAL SETTING / SCRIMMAGE

Career

Physical

Emotional

Social

Family

Spiritual

Associated Self-Assessment Categories

Category	Current Assessment	Priority	Open Action Items	Action Required?
Education	✓	Low	1	
Employment	✓	Low	0	
Work Plan	✓	Low	0	

CAREER Challenges, Action Statements & Goals

View all In-Progresses & New Goals

View all In-Progresses

[Add Challenge](#)

Unassigned

Medical retirement from the Army

[Add Action Statement](#)

Action Statement	Status	Selected Months	Added
I will meet with my TC and explore my internship opportunities with federal agencies.	In Progress	APR, MAY, JUN	05 Mar 2024

[Add End State / Sub-Goal](#)

End State (Sub-Goal)	Status	Added
I will medically retire from the Army and gain a civilian job.	In Progress	05 Mar 2024

[Contact friends to catch-up](#)

Phase One Goal Setting

Date: 30 Jan 2023

Status: Complete

Learning: Phase 1 goal setting completed on 1/30/2023.

Scrimmage Details

Scrimmage Title: Transition from the Army

Target Transition Date: 26 Apr 2024

Transition Goal Outcome: Obtain a BA in Computer Science

Scrimmage Sub-Goal Count by Domain

Domain	Total # End States (Sub-Goals)	Open Action Items
Career	1	1
Emotional	1	0
Family	1	0

Scrimmage and Goal Setting Screen

Label	Name	Description
A	View Printable Version button	Click View Printable Version to view the printable version of the CTP Scrimmage Worksheet
B	Scrimmage Worksheet button	Click Scrimmage Worksheet to conduct a Scrimmage using the online Scrimmage Worksheet
C	Associated Self-Assessment Categories section	View data from the Self-Assessment and Action Items. - Click on a tab to view a different domain - Click on a Category hyperlink to go to the Self-Assessment Summary screen - Click on an Open Action Items hyperlink to go to the Action Items screen
D	Challenges, Action Statements & Goals	View Challenges, Action Statements, and Sub-Goals added from the Scrimmage Worksheet: - Click the Add Challenge icon to add a new challenge - Click the Add Action Statement icon to add a new Action Statement - Click the Add End-State (Sub-Goal) icon to add a new Sub-Goal <u>NOTE: Use the list boxes to filter the Action Statements and Goals.</u>
E	Phase One Goal Setting	This section displays the Phase One Goal Setting information.

Label	Name	Description
F	Scrimmage Details section	View Scrimmage Details: ■ Click Edit to set career track and target transition information ■ Click the Confirm hyperlink to confirm the Initial Scrimmage
G	Scheduled Scrimmage/ Focused Transition Review section	Schedule scrimmages or Focused Transition Reviews (FTRs). ■ Click Schedule Next to schedule an Initial, Follow-on Scrimmage or FTR ■ Click on the Type hyperlink to view the appointment details
H	Scrimmage Sub-Goal Count by Domain	View a count of Sub-Goals and open Action Items for each domain.

Phase One Goal Setting

PERMISSIONS: Assigned Occupational Therapist, Administrator

Phase One Goal Setting must be completed before Soldiers or Cadre can:

- Access Goal Setting functionality
 - Establish CER eligibility
 - Schedule the Initial Scrimmage
-

Schedule Phase One Goal Setting

To schedule a date for Phase One Goal Setting:

1. Click **Goal Setting / Scrimmage** from the Navigation Sidebar.
2. The Phase One Goal Setting screen opens.

PHASE ONE GOAL SETTING

Please select the date Goal Setting Training is scheduled to be completed

* Goal Setting Date: 01 Feb 2023

* Status: Not Scheduled ☐ Scheduled ☒ Complete ☐ Unable to Complete ☐

Comments: Scheduled for 2/1/23 with Ms. Bobby. 9-12 in the SFAC.

Words: 10 Characters: 55

Save

3. Select the date when Goal Setting Training is scheduled to be completed.
4. Change the status to “Scheduled.”
5. Add comments.
6. Click **Save** to close the dialog box without deleting.

NOTE: This function does not currently have a location or time listed. See [Edit Appointment for information on modifying the resulting appointment.](#)

Scheduling Phase One Goal Setting will:

- Add an appointment to the Soldier's case
- Add an appointment in the Soldier's module
- Generate appointment notifications for the Soldier's Squad Leader and Platoon Sergeant

Complete Phase One Goal Setting

To mark Phase One Goal Setting as complete:

1. Click Goal Setting / Scrimmage from the Navigation Sidebar.
2. Change the status to “**Complete.**”

PHASE ONE GOAL SETTING

Please select the date Goal Setting Training is scheduled to be completed.

* Goal Setting Date: 01 Feb 2023

* Status: ☐ Not Scheduled ☐ Scheduled ☒ **Complete** ☐ Unable to Complete

Comments: Goal setting with Ms. Bobby completed. 9-12 in the SFAC.

Words: 10 Characters: 58

[Save](#)

3. Click **Save**. The Goal Setting / Scrimmage screen now opens.

GOAL SETTING / SCRIMMAGE

[View Printable Version](#) [Scrimmage Workbook](#)

Phase One Goal Setting

Date: 01 Feb 2023

Status: Complete

Comments: Goal setting with Ms. Bobby completed. 9-12 in the SFAC.

Scrimmage Details [Edit](#)

Career Track: Transition from the Army

Target Transition Date: 24 Jul 2023

Transition Goal Outcome:

Initial Scrimmage Confirmed: [No Confirm](#)

Confirmed by:

[Schedule Next](#)

Type:

Date / Time:

Location:

Scrimmage Sub-Goal Count by Domain

Goal Setting

Phase One Goal Setting must be completed by the Occupational Therapist before Goal Setting is available in ARCS.

For assistance in developing goals, see the Goal Setting Workbook provided during Phase 1 Goal Setting by the Occupational Therapist. The language in the Goal Setting section of ARCS is aligned with this workbook.

Terminology

- **Challenge:** Soldier’s areas of improvement
- **End-State (Sub-Goal):** Soldier’s desired end-state in relation to a Challenge
- **Action Statement:** Specific steps the Soldier will take to reach the desired end-state

Create Goals

PERMISSIONS: Soldiers and most user roles EXCEPT: ARCP Leadership, SRU Leadership, All-Access Company/Platoon/Squad

1. [Add Challenge](#)
2. [Add End-State \(Sub-Goal\)](#)
3. [Add Action Statement](#)

Add Challenge

The screenshot displays the 'CAREER Challenges, Action Statements & Goals' page. At the top, there are two dropdown menus: 'View all in Progress Action State...' and 'View all in Progress...'. Below these, a challenge is listed with the title 'Obtain an Internship with a Federal Agency.' To the left of the challenge title are five icons labeled A through E. Below the challenge title, there are two sections: 'Action Statement' and 'End State (Sub-Goal)'. Both sections show 'No Action Statements found for this Challenge' and 'No End States (Sub-Goals) found for this Challenge' respectively.

Add Challenge Items

Label	Name	Description
A	Add Challenge icon	Click Add Challenge to add another challenge.
B	Expand / Collapse icon	Click this icon to expand or collapse the challenge.
C	Edit hyperlink	Click Edit to edit the challenge title.
D	Add Action Statement icon	Click Add Action Statement to add a new Action Statement to the Challenge.
E	Add End-State (Sub-Goal) icon	Click Add End-State (Sub-Goal) to add a new Sub-Goal for the identified Challenge.

To add a challenge to the scrimmage worksheet:

1. Click the **Add Challenge** icon.
2. The Challenge field opens.



3. Enter the Challenge
4. Click **Save** to retain the Challenge or click **Cancel** to close the window without saving.

Use the arrow icon to show additional options for adding Action Statements and End-State (Sub-Goals).



Add End-State (Sub-Goal)

To add an End-State (Sub-Goal):

1. Expand the Challenge using the black arrow.



1. Click the Add End-State (Sub-Goal) icon .

+ Add Challenge

Challenge

[Edit](#) Obtain an internship with a Federal Agency.

+ Add Action Statement

Action Statement	Status	Selected Months	Added
Edit I will meet with my TC to review Federal Agency Internship options.	In Progress	APR, MAY, JUN	05 Mar 2024

+ Add End State (Sub-Goal)

End State (Sub-Goal)

No End States (Sub-Goals) found for this Challenge

2. A Sub-Goal area opens.

+ Add End State (Sub-Goal)

End State (Sub-Goal)

I will medically retire from the Army and gain a Civilian job.

Status: Added ▾

In Progr... ▾

[Cancel](#) **Save**

3. Enter the Soldier's desired End-State , and select a status.
4. Click **Save** to retain the Sub-Goal or click **Cancel** to close the window without saving.
5. The Sub-Goal, status and date are added.

+ Add End State (Sub-Goal)

End State (Sub-Goal)

[Edit](#) I will medically retire from the Army and gain a Civilian job.

Status: In Progress

Added: 05 Mar 2024

Add Action Statement

Action Statements define what specific actions a Soldier will accomplish to make progress toward a goal. Action Statements can be entered by the Soldier as well as any user with access to Goal Setting.

Action Statements are structured using the SMART format.

- S – Specific
- M – Measurable
- A – Actionable
- R – Realistic
- T – Time-bound
- It is common for a Sub-Goal to have multiple Action Statements
- Each Action Statement should step the Soldier closer to their Sub-Goal
- Identifying specific actions for each month allows Soldiers to make continuous, measurable progress
- Avoid Action Statements that cannot be met within 90 days

EXAMPLE

Physical

Sub Goal: Increase endurance

S: I

M: Walk/run 1 minute more each week

A: starting this week

R: incremental improvement keeping within my profile

T: within 1 month

GOAL: I push myself to run/walk 1 minute more each week for the next month.

To add an Action Statement:

1. Click the **Add Action Statement** icon.

The screenshot shows a web form titled 'Add Challenge'. Under the 'Challenge' section, there is a table with columns: 'Action Statement', 'Status', 'Selected Months', and 'Added'. The first row is empty, and the second row contains the text 'No Action Statements found for this Challenge'. A red arrow points to the 'Add Action Statement' button located above the first row.

2. Enter a SMART Action Statement, select a status, and select applicable months.

The screenshot shows a web form titled 'Add Action Statement'. It has a table with columns: 'Action Statement', 'Status', 'Selected Months', and 'Added'. The first row is empty, and the second row contains the text 'No Action Statements found for this Challenge'. A red arrow points to the 'Add Action Statement' button located above the first row. Below the table, there is a text input field for the action statement, and two dropdown menus for 'In Progr...' and 'APR, MAY'.

3. Click **Save** to retain the action statement or click **Cancel** to close the window without saving.

Manage Goals

1. [Manage and Close Action Statement](#) - mark Met or Unmet
2. [Complete Sub-Goal](#)
3. [Mark Challenge as Met](#)

Manage and Close Action Statement

Action Statements require regular maintenance. It is important to update Action Statements in a timely manner.

As Soldiers complete Action Statements, the status is moved to **Met**

1. Open the Action Statement by selecting Edit.

The screenshot shows a 'Challenge' interface with a table of Action Statements. The first row is highlighted, and a red arrow points to the 'Edit' link in the first column. The table has columns for 'Action Statement', 'Status', 'Selected Months', and 'Added'.

Action Statement	Status	Selected Months	Added
I will meet with my TC to explore internship opportunities for Federal Agencies. I will start this in the next 3 months.	In Progress	APR, MAY	05 Mar 2024

2. Choose the new status (Met or Unmet) and Save.

The screenshot shows the 'Edit' form for an Action Statement. The 'Status' dropdown menu is open, and 'MET' is selected. The 'Selected Months' dropdown is also open, showing 'APR, MAY'. The 'Save' button is visible at the bottom.

If a Soldier chooses to change direction or does not accomplish the listed action within the established time frame, the status is moved to **Unmet**

- Do not edit and extend Action Statements
- If the Action Statements is Unmet in the established time frame:
 1. Mark the Action Statement as Unmet
 2. Create a new Action Statement with an updated time line

- This creates a more accurate reflection of the Soldier's challenges and accomplishments.

NOTE: If the originally selected months for the Action Statement have passed, the current month must be selected before ARCS will allow the status change. This will cause the Action Statement to appear as if it was active in the current month. *Timely closing of Action Statements will avoid this issue.*

Complete Sub-Goal

1. Close all related Action Statements by marking each as Met or Unmet. See [Manage and Close Action Statement](#).
2. Open the Sub-Goal by selecting Edit



3. Update status to Met or Unmet



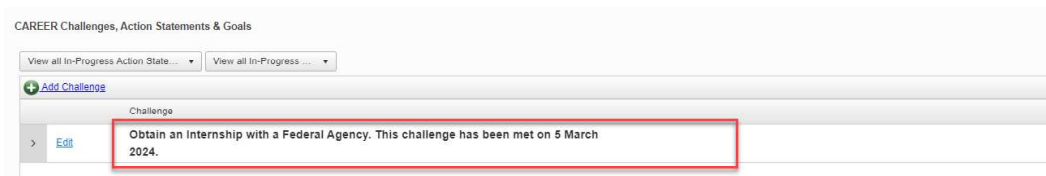
4. Click **Save** to complete the Sub-Goal or click **Cancel** to close the window without saving.

Mark Challenge as Met

1. Close all related Sub-Goals by marking each as Met or Unmet. See [Complete Sub-Goal](#).
2. Open the Challenge by selecting Edit.



3. Edit the text field to notate the challenge has been met and **Save**.



NOTE: Challenges cannot currently be closed. The best practice for noting that a Challenge has been met is editing the text field

Scrimmage

The scrimmage is an informal meeting with the Soldier's IDT that uses the six domains of strength (career, physical, emotional, social, family and spiritual) to develop and refine a future-oriented plan. The scrimmage is designed to engage the Soldier in finalizing identified goals, sub-goals and supporting action statements for their time in the SRU and the future. The scrimmage is a discussion held between the Soldier and the IDT to ensure the Soldier is getting all the support he needs to successfully recover.

Scrimmages are required within the first 45 days and at 120 intervals (or sooner) thereafter. FTRs will count as scrimmages when they occur.

NOTE: The Initial Scrimmage and all follow on Scrimmage/FTRs must be scheduled in the Scrimmage/Goal Setting section of a Soldier's case.

Schedule Initial Scrimmage

PERMISSIONS: Social Worker, SSA, Program Analyst, Administrator

To schedule the initial Scrimmage:

1. Click **Schedule Next** from the Scheduled Scrimmage / Focused Transition Review section.

2. The Add Appointment window opens with Initial Scrimmage selected as the type. If an FTR is taking the place of the Initial Scrimmage, change the Type to "FTR."

3. Enter the Scrimmage Appointment details, including Location, Facilitator, Date, Time, and any comments.
4. Click **Validate Conflicts** to check the scrimmage against the Soldier's previously scheduled appointments.
5. Click **Submit** to schedule the initial Scrimmage or **Cancel** to go to the Appointments screen.

The Appointment will be available from the Goal Setting/Scrimmage and Appointments section of the Soldier's case, and from the Appointments section of the Soldier Module. Additionally, an email will be generated to the Company Commander to .



Scheduled
Scrimmage/Focused
Transition Review

Schedule Next

Type: Initial Scrimmage

Date / Time: 03 Oct 2017
11:00

Location: HHC Conf
Room

Schedule Follow-on Scrimmage

PERMISSIONS: Social Worker, SSA, Program Analyst, Administrator

NOTE: Until the Initial Scrimmage (or an FTR taking the place of the Initial Scrimmage) status is "Kept", it is not possible to schedule a follow-on Scrimmage.

1. Click **Schedule Next** from the Scheduled Scrimmage / Focused Transition Review section.

The screenshot shows a software window titled "Add Appointment not in AHLTA/CHCS". Inside, there are several input fields: "Recurrence" is set to "None"; "Date" and "End Date" are both "08 December 2017"; "Start Time" is "11:00" and "End Time" is "12:00"; "Location" is "A Co Conf Room" and "Facilitator" is "Mr Smith"; "Type" is a dropdown menu currently showing "Follow-on Scrimmage". Below these is a "Comments" section with a text area containing the text "Update Goals". At the bottom right of the window are three buttons: "Validate Conflicts" (with a green checkmark icon), "Cancel" (with a red X icon), and "Save" (with a green plus icon). The status bar at the very bottom indicates "Words: 2 Characters: 12".

1. In the Add Appointment window, enter Scrimmage Appointment details, including Location, Facilitator, Date, Time, and any comments.
2. From the Type list box, the default is "Follow-on Scrimmage."
3. Click **Submit** to schedule the scrimmage, or **Cancel** to go to the Appointments screen.

Schedule FTR

PERMISSIONS: Social Worker, SSA, Program Analyst, Administrator

A Focused Transition Review (FTR) takes the place of a scrimmage. FTRs are held within two weeks of MRDP, or at 730 days, whichever comes first. If a Soldier enters the SRU after MRDP, the FTR typically takes the place of the initial scrimmage.

To schedule an FTR:

1. Click **Schedule Next** from the Scheduled Scrimmage / Focused Transition Review section.
2. The Add Appointment window opens. Select FTR from the **Type** drop down.

The screenshot shows a window titled "Add Appointment not in AHLTA/CHCS". It contains two main sections: "Recurrence:" and "Status:". Under "Recurrence:", there are fields for "* Date:" (20 October 2017), "* Start Time:" (09:00), "* Location:" (A Co Conf Room), and "* Type:" (FTR). Under "Status:", there are fields for "* End Date:" (20 October 2017), "* End Time:" (10:00), and "* Facilitator:" (MAJ James). Below these is a "Comments:" section with a large text area and a toolbar. At the bottom right are three buttons: "Validate Conflicts" (with a green checkmark icon), "Cancel" (with a red X icon), and "Save" (with a green plus icon). The status bar at the bottom shows the path ".../AppointmentDetails/Scrimmage/21139".

3. Enter the Appointment details, including Location, Facilitator, Date, Time, and any comments.
4. Click **Validate Conflicts** to check the FTR against the Soldier's previously scheduled appointments.
5. Click **Submit** to schedule the FTR or **Cancel** to go to the Appointments screen.

The Appointment will be available from the Goal Setting/Scrimmage and Appointments section of the Soldier's case, and from the Appointments section of the Soldier Module.

Update Scrimmage Appointment

PERMISSIONS: Social Worker, SSA, Program Analyst, Administrator

Before scheduling the next scrimmage or FTR appointment, the previous appointment must be updated.

To update an existing scrimmage appointment:

1. Click "Update Scrimmage" from the Soldier's Goal Setting/Scrimmage page.

Scheduled Scrimmage/Focused Transition Review

Update Scrimmage

Type: Follow-on Scrimmage

Date / Time: 07 Feb 2019 11:15

Location: test

2. The appointment popup displays.
3. Modify the Status field with the outcome. If 'No Show' is selected, completed the additional required fields

Edit Pending Scrimmage Appointment not in AHLTA/CHCS

Recurrence: NONE

* Status: Kept

* Date: 07 February 2019

* End Date: 07 February 2019

* Start Time: 11:15

* End Time: 12:15

* Location: test

* Facilitator: Ms Grubb

* Type: Follow-on Scrimmage

Comments:

Words: 0 Characters: 0

Validate Conflicts Cancel Save

4. Click **Save** to update the scrimmage, or **Cancel** to abandon the changes.

Conduct a Scrimmage

Preparation:

1. Prior to the Scrimmage, Soldiers should review and update goals and action statements as met/unmet.

2. [Print Scrimmage Worksheet](#) for scrimmage attendees to reference if desired.
3. During the scrimmage, open the Goal Setting / Scrimmage page in ARCS.
4. Review Target Transition Date and Career Track on the Scrimmage/Goal Setting page of the Soldier's case.
5. Review Met/Unmet items in each of the six domains. ([Generate Soldier Handbook](#) for a comprehensive list of Goals)
6. Online Scrimmage Worksheet is used to review and edit Sub-Goals and Action Statements for this month and the coming 3 months.

Using the Scrimmage Worksheet:

1. Click **Scrimmage Worksheet** at the top of the Goal Setting / Scrimmage screen.
2. The Scrimmage Worksheet opens.

The screenshot displays the 'Scrimmage Worksheet' interface for the 'Career' domain. At the top, there are tabs for 'Career', 'Physical', 'Emotional', 'Social', 'Family', and 'Spiritual'. Below the tabs, the title 'CAREER Challenges, Action Statements & Goals' is visible. The interface is divided into three main sections: 'Add Challenge', 'Add Action Statement', and 'Add End State (Sub-Goal)'. Each section contains a table of items with columns for 'Challenge', 'Action Statement', 'Status', 'Selected Months', and 'Added'. The 'Add Challenge' section shows two challenges: 'I don't have industry certification for IT.' and 'Do Not have a Soldier plan for transition.' The 'Add Action Statement' section shows five action statements, all with a status of 'In Progress' and a date of '14 Sep 2017'. The 'Add End State (Sub-Goal)' section shows one end state: 'Create a transition plan for myself' with a status of 'In Progress' and a date of '14 Sep 2017'.

Challenge	Action Statement	Status	Selected Months	Added
Edit I don't have industry certification for IT.				
Edit Do Not have a Soldier plan for transition.				
	Edit Submit all education funding request by the Dec deadline.	In Progress	DEC	14 Sep 2017
	Edit Research Computer Science degrees available nearby before the end of Oct.	In Progress	OCT	14 Sep 2017
	Edit Talk to Education Counselor to get on track to enroll in spring semester of college.	In Progress	NOV	14 Sep 2017
	Edit See Voc Rehab people and complete assessments available through that program by the end of Nov.	In Progress	NOV	14 Sep 2017
	Edit Meet with TC to begin assessments	In Progress	OCT	14 Sep 2017
	Edit End State (Sub-Goal)			
	Edit Create a transition plan for myself	In Progress		14 Sep 2017

This worksheet displays the six domains of the RCP Goal Setting Process: Career, Physical, Emotional, Social, Family, and Spiritual. The following sections describe how to add Challenges, Action Statements, and Sub-goals to these areas.

The following will be pre-populated on the Scrimmage Worksheet:

- Previously added Challenges.
- In Progress Action Items.

- In Progress Sub-Goals.
3. Review, update, and add new items to the worksheet as appropriate.
 4. [Print Scrimmage Worksheet](#) if any modifications have been made.
 5. Collect appropriate signatures on the scrimmage worksheet.
 6. Provide a signed copy of the worksheet to the Soldier.
 7. Scan and [Add Attachment](#) to the Soldier's case.

Print Scrimmage Worksheet

NOTE: Items only populate on the Scrimmage Worksheet if there are associated Action Statements for any of the coming three months.

To print the scrimmage worksheet with lines for signatures:

1. Click **View Printable Version** button.
2. The Scrimmage Worksheet opens in a new window.

Comprehensive Transition Plan (CTP) Scrimmage Worksheet					
Track Preference: <u>Remain in the Army</u>		Transition Outcome Goal:			
Six CTP Domains (Challenges)		Action Statements that support the Sub Goals			Sub Goals
		Apr 2012	May 2012	Jun 2012	
Career	Challenge 2	action for challenge 2 edit	action for challenge 2 edit	action for challenge 2 edit	Sub-Goal for Scrimmage workshe
	new challenge	action	action	action	
Physical	physical challenge deets		action for PT	action for PT	PT Goal
Emotional					
Social					
Family					
Spiritual					
Soldier's Signature:			Next CTP Scrimmage Date:		
Squad Leader (Name and Signature):			Target Transition Date: 25 Mar 2013		
Nurse Case Manager (Name and Signature):			Additional Notes:		
Social Worker (Name and Signature):					

3. Print using the print icon or choose a format and export the worksheet.
4. Close the window to return to ARCS.

Set Career Track and Target Transition Goal

To set Transition and Outcome Goals:

Risk Assessment Summary Items

Label	Name	Description
A	Initiate New Risk Assessment button	Click Initiate New Risk Assessment to start a new Risk Assessment <u>NOTE: If there is already an active Risk Assessment, initiating a new assessment will close the current active assessment.</u>
B	New or Completed Assessment hyperlink	Click an assessment hyperlink to begin a pending Risk Assessment. Click on a completed assessment hyperlink or the printer icon to view a read-only version of the risk assessment.
C	Date Created hyperlink	Click the hyperlink to view another Risk Assessment. These can be either complete or incomplete.

Risk Assessment Dashboard

Appears on HOME page for: Squad Leader, Platoon Sergeant, Nurses Case Manager, Social Worker, Company Commander, Program Analyst

The Risk Assessment Dashboard displays open Risk Assessments for Soldiers assigned the user and Soldiers in "Pending In-Processing" status (before they are assigned to a Company in the SRU). All current completed risk levels assigned by other Cadre will display on the dashboard.

Soldier Name	Risk-Assessments Due			
	Created	CO CDR	SW	NCM PSG
Devaughan, Suzette	11/07/2017			!
Christophel, Robyn	11/07/2017			
Behen, Cyril	11/03/2017			—
Blow, Stacey	11/03/2017			!
Total: 4				

Information is color coded:

- Red name hyperlink: Initial 24 hour Risk Assessment
- Blue name hyperlink: All other Risk Assessments

Launch the Risk Assessment directly from the dashboard by clicking on the Soldier's name hyperlink. When the user has completed their portion of the assessment, the Soldier's name is removed from the grid.

Initiate New Risk Assessment

PERMISSIONS: Administrator, Program Analyst, Social Worker, Company Commander, Nurse Case Manager, Platoon Sergeant, Squad Leader

When a Soldier is in-processed into the program, generation of their initial Risk Assessment is based on clinical status. See [Clinical Status](#).

If a Risk Assessment has not been started, or a new assessment is needed, the SL, PSG, NCM, SW, Company CDR, or Program Analyst can initiate a Risk Assessment.

NOTE: A new Risk Assessment cannot be initiated if the currently Active Risk Assessment has not been completed by any of the Assessors. If there is an Active Risk Assessment, initiation of a new Risk Assessment will set the status of the previously active assessment to "Incomplete."

1. From the Risk Assessment section of the Soldier's case, select **Initiate New Risk Assessment**.

The screenshot shows the 'Risk Assessment' section of a Soldier's case. At the top right, there is a 'Print' button and a red-bordered button labeled 'Initiate New Risk Assessment'. Below this is the 'Risk Assessment Details' section, which includes the following information:

- Status: Active
- Initiated By: 30, SW
- Date Initiated: 04 Apr 2017
- Justification: Discharged from In-patient

Below the details is a table with the following columns: Assessment, Risk Designation, Risk Score, Assessment Date, Plans, and Comments.

Assessment	Risk Designation	Risk Score	Assessment Date	Plans	Comments
CDR: PSG/SL NCM:30, NCM	!	56	04 Apr 2017		Soldier is HR for BH concerns. Released from in-patient. Monitor closely for depression/SL. Contract for Safety discussed.
SW:30, SW	!	High/Severe	04 Apr 2017		Just released from in-patient BH treatment. Will remain HR for at least 6 months. ST seems to be stabilized and is hopefully about her future. Working to develop additional social supports. Denies SI/Hi. Last SI with plan August 2016.

2. If a Risk Assessment is currently in-progress, a warning message will appear. Select **Continue and enter justification**. In the above example, the current Risk Assessment will close as "Incomplete" and a new Risk Assessment will be generated for all assessors.

The screenshot shows a 'Warning' dialog box with the following text: 'Initiating a new assessment will close the current active assessment'. Below the text are two buttons: 'Cancel' and 'Continue and enter justification >'.

3. An Initiate New Soldier Risk Assessment dialog box opens.