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

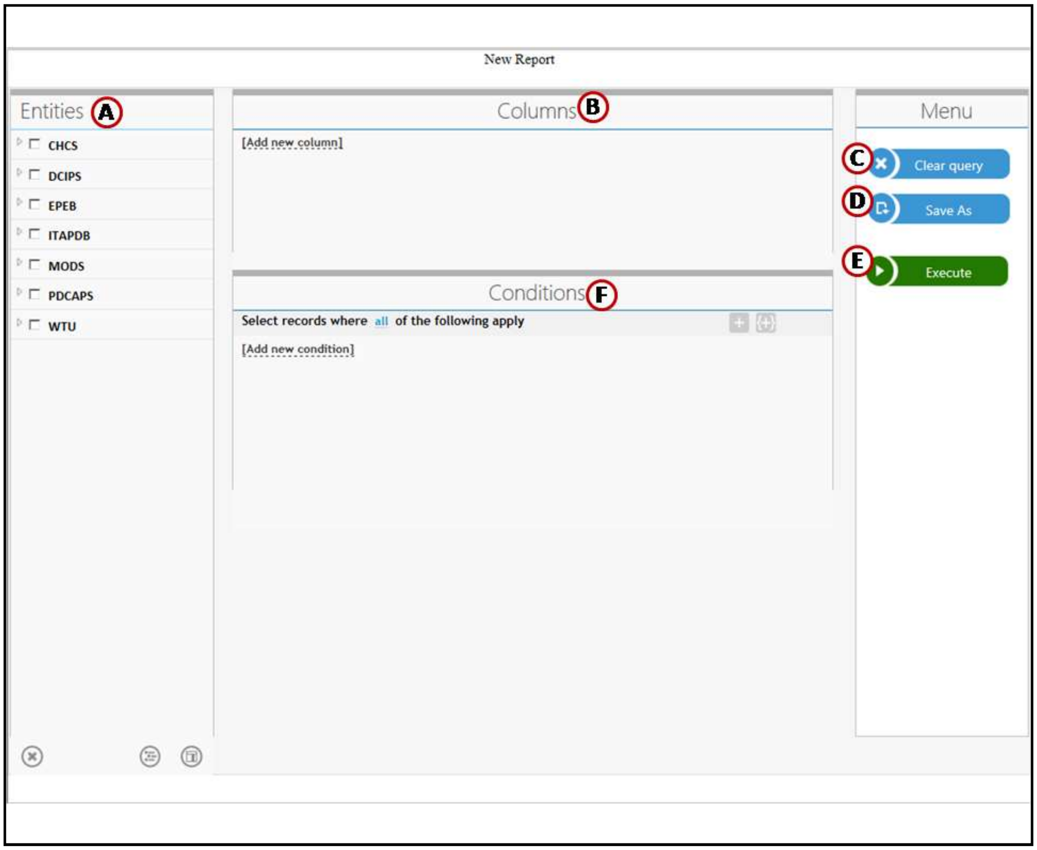
NOTE: For assistance building Ad Hoc Reports, please contact your Program Analyst or the ARCS Service Desk.

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.

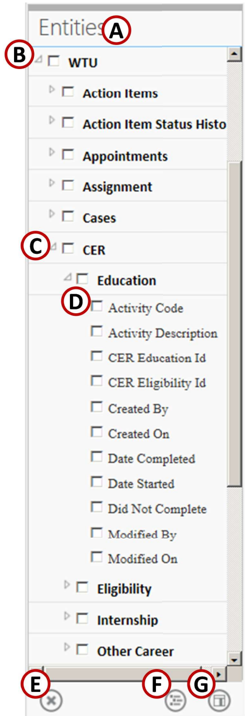


Ad-Hoc Report Builder

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

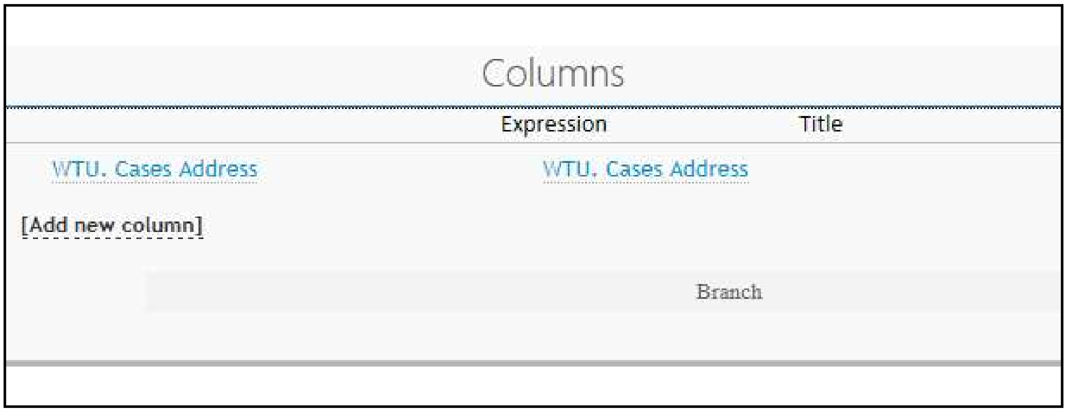
The reporting entities that you select will be the building blocks of your report. You can arrange them the way you like by setting up columns and conditions. Each selected entity can be added to the report as a column, a condition or both.



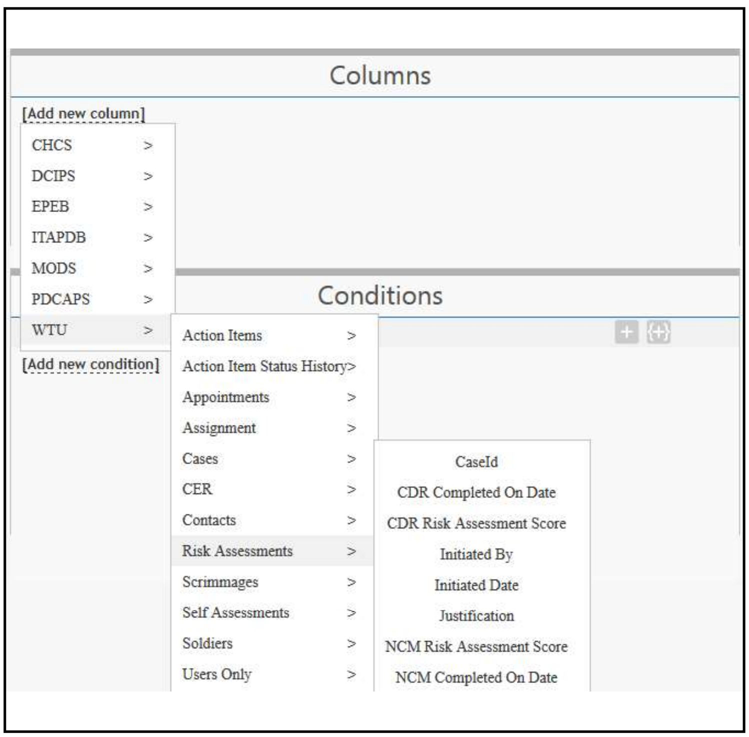
Entity Selection Screen

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 Condi-tions	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.

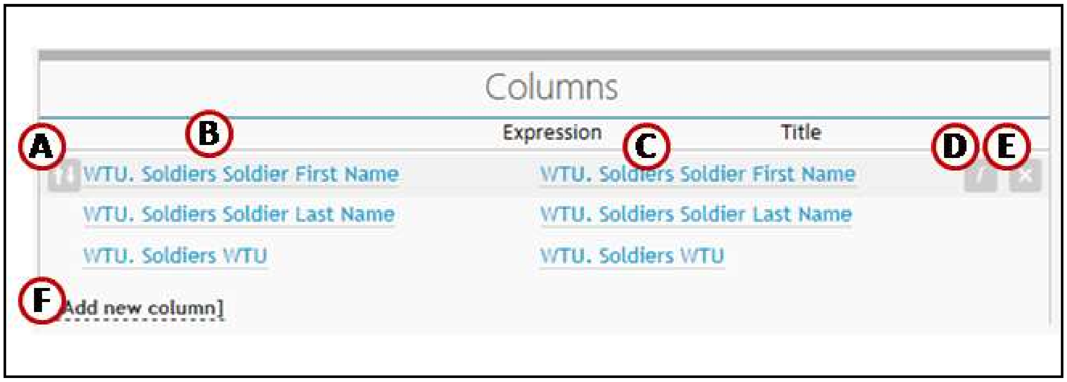


The last way to add columns or conditions is to click on the [Add new column] or [Add new condition] links. Clicking on the links will open selection menu to choose the data item. Click on the data field to select.



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.

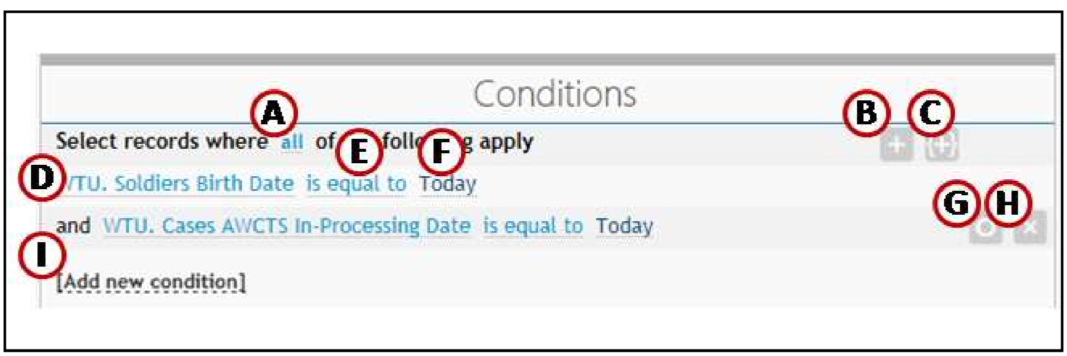


Report Selected Columns Description

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 con-ditions	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, includ-ing: • 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 **NOTE: The options in this menu will change, depending on the type of condition (data field) selected.**

Label	Name	Description
F	Value	Click the hyperlink to enter or edit a value, such as an amount, number of days, date range, etc. **NOTE: This will change, depending on the condition and operation selected.**
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

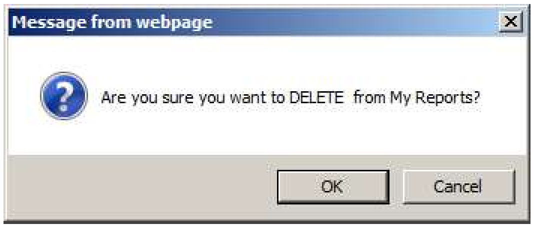
Delete Ad Hoc Report

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"

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 Report[1] 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)

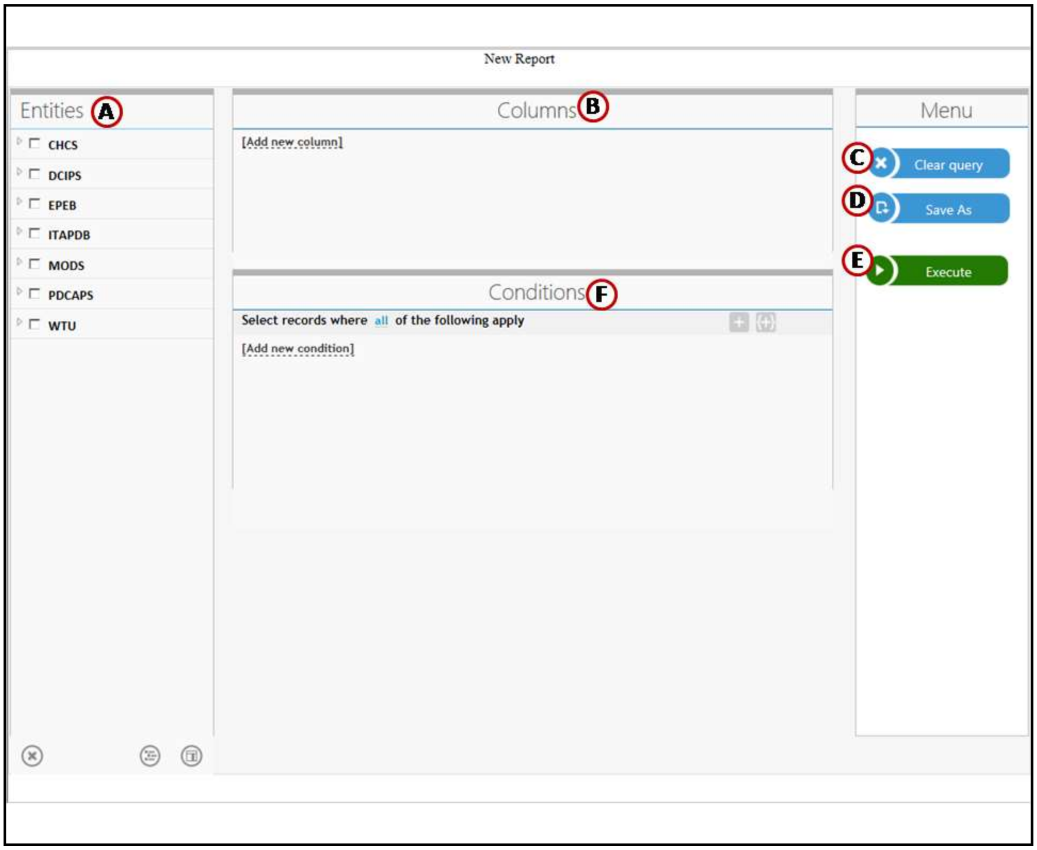
Steps:

1. Log in to ARCS and click on Reports. 

2. Click on Create Report. 

3. The New Report window is displayed.

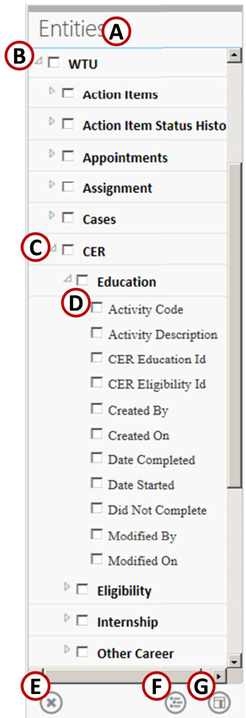
[1]Report created with user selected entities. Ad Hoc reports can be run one time, so the report can be saved and run again in the future.



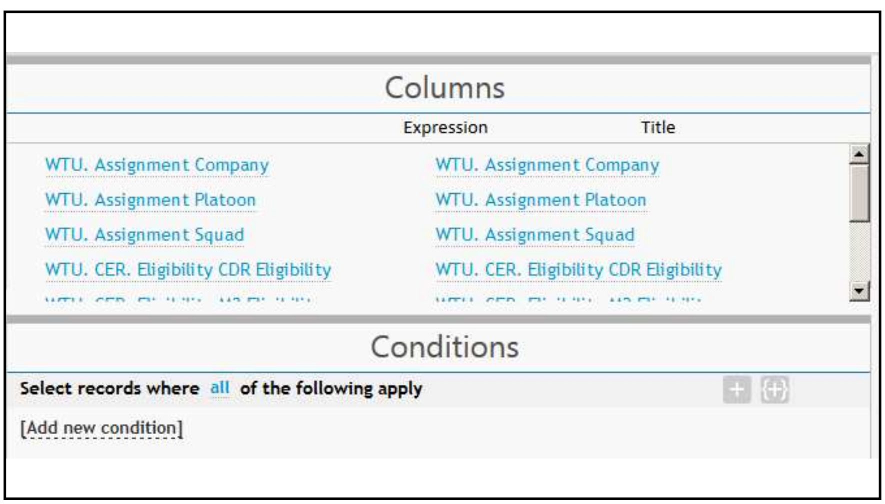
4. Start by selecting the data to be displayed in the columns
5. Click on the arrow next to SRU to expand the options then click the arrow next to Soldiers and click the following checkboxes:
    a. Soldier First Name
    b. Soldier Last Name
    c. SRU
6. Click the arrow next to Assignment to expand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



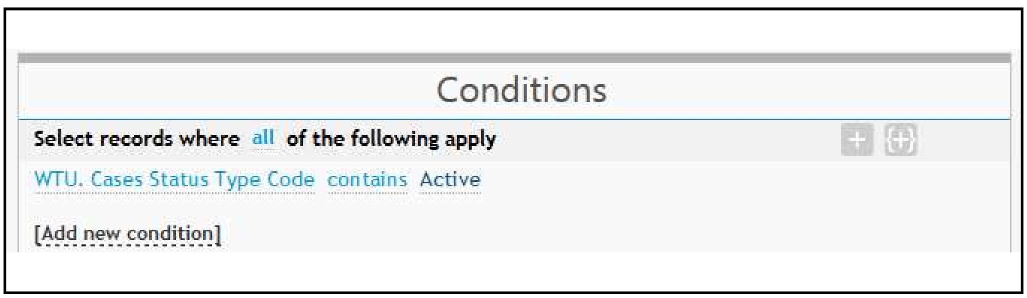
10. Change the order of the columns:

    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 | Export to Excel | Export to CSV

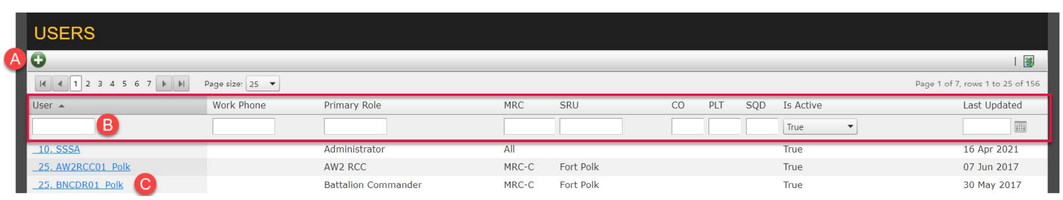
TOTALROWS	RowNumber	WTU_ Soldiers Soldier Last Name	WTU_ Soldiers Soldier First Name	WTU_ Assignment Company	WTU_ Assignment Platoon	WTU_ Assignment Squad	WTU_ CER_ Eligibility CDR Eligibility	WTU_ CER_ Eligibility M2 Eligibility	WTU_ Soldiers WTU
4	1	TEST	SOLDIER26	HHC	1st	1st	null	null	CBWTU Illinois
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.



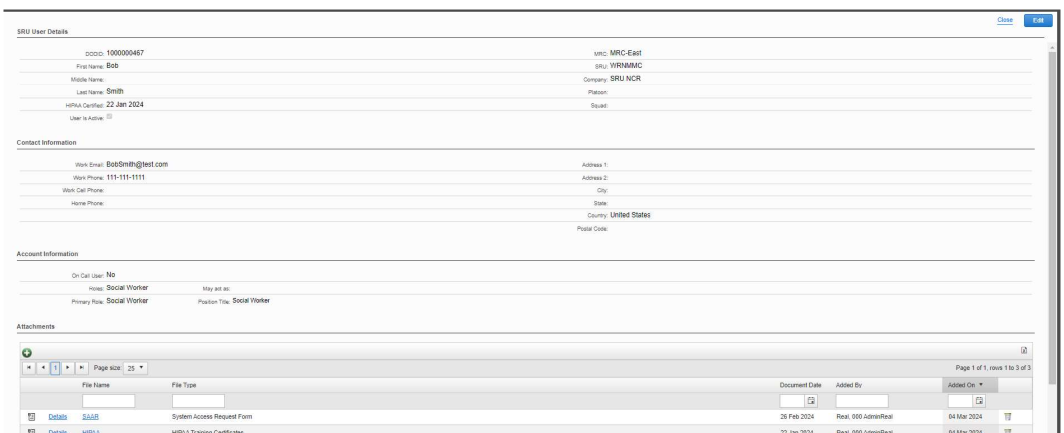
User Dashboard Items

	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

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

The SRU User Details screen opens.

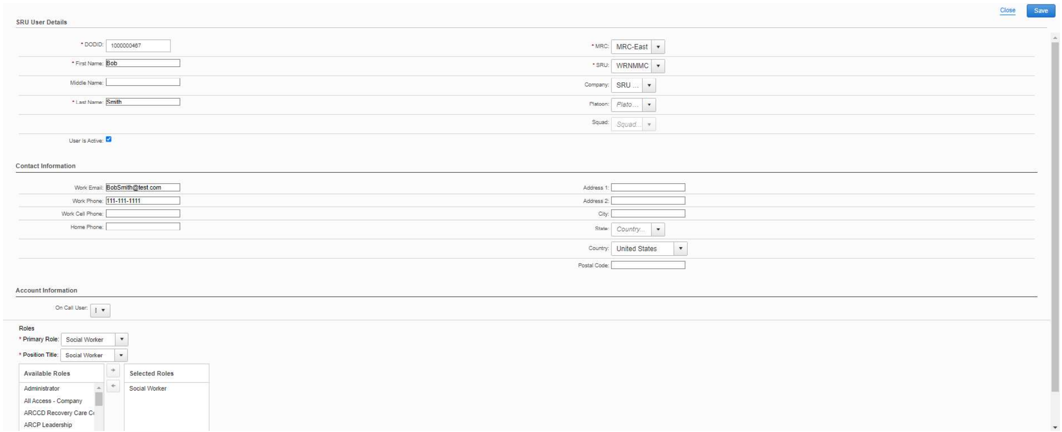


Edit SRU User

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.

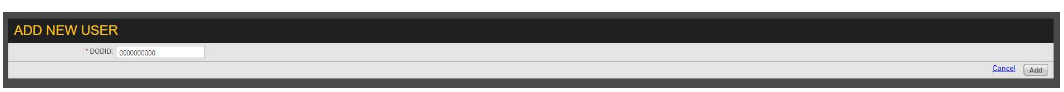
Add New SRU User

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.

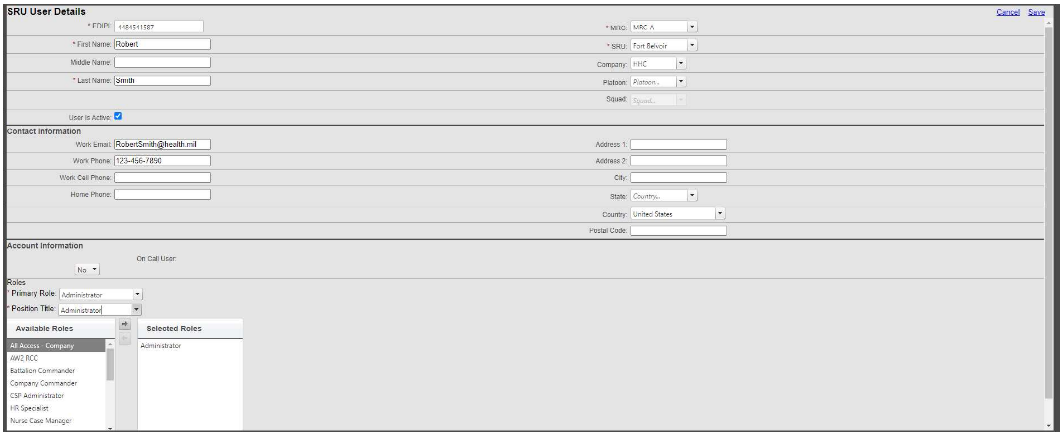


2. Enter the User's DODID from their ID card.

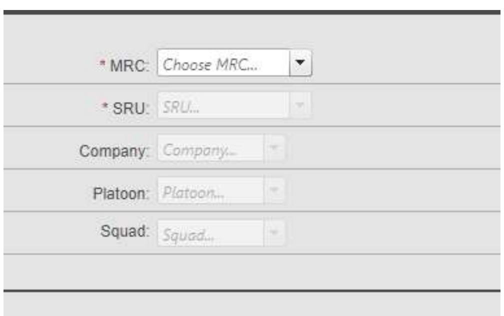
3. Click **Add** to continue, or **Cancel** to quit without saving.

The SRU User Details screen opens.

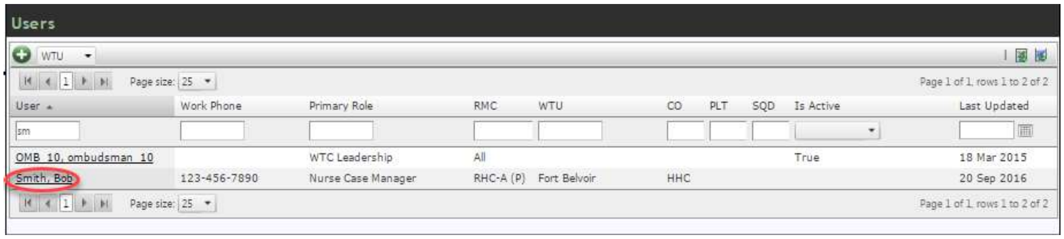
NOTE: If the User has had an ARCS account, the record will open. Update the existing information and ensure the User is Active box is checked..



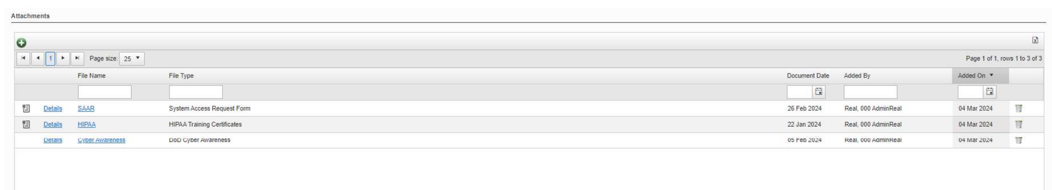
4. Select the Select the level of assignment (MRC, SRU, Company, Platoon, Squad). The available roles will vary based on the user's assignment.



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.

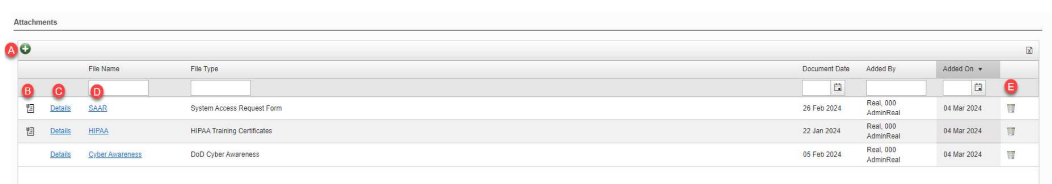


10. Add the User's DD 2875, System Access Authorization Request, and HIPAA Certificate to the attachments section.



User Profile Attachments

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



Attachments Screen Items

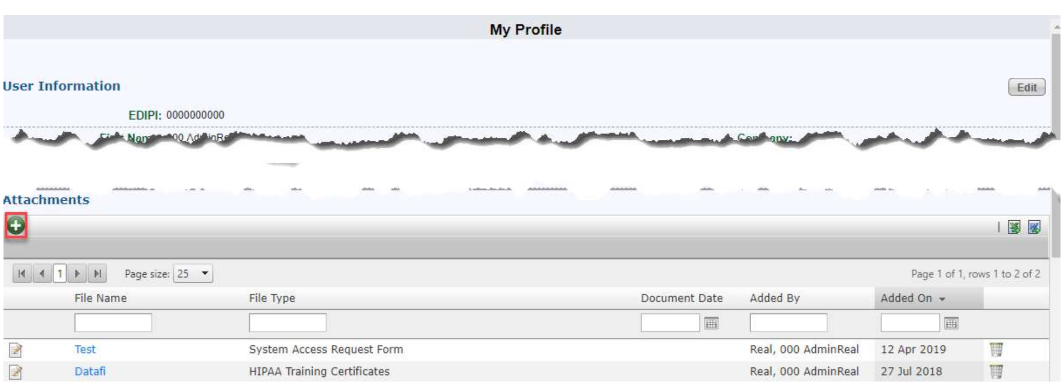
Label	Name	Description
A	Add Attachment icon	Click the Add icon to add a new attachment. This adds a case log entry in the case log.
B	View PDF Attachment	Click the View PDF icon to view the attachment in a pop-up.
C	View Attachment Details hyperlink	Click the View hyperlink to view the attachment details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

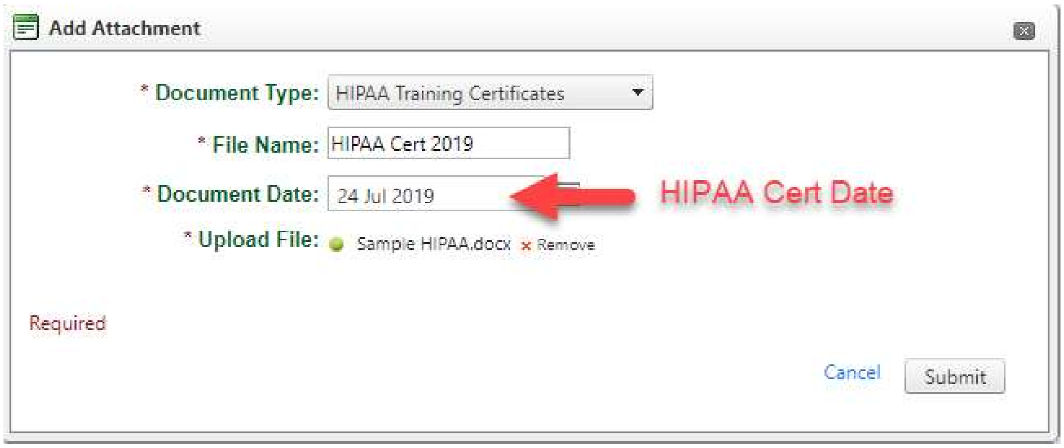
HIPAA certification is required for ongoing access to ARCS. Accounts are suspended automatically on the first of the month following the expiration of the current HIPAA Trained date. When a user's HIPAA Certification is within 1 month of expiration, a warning message will be displayed at each log in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



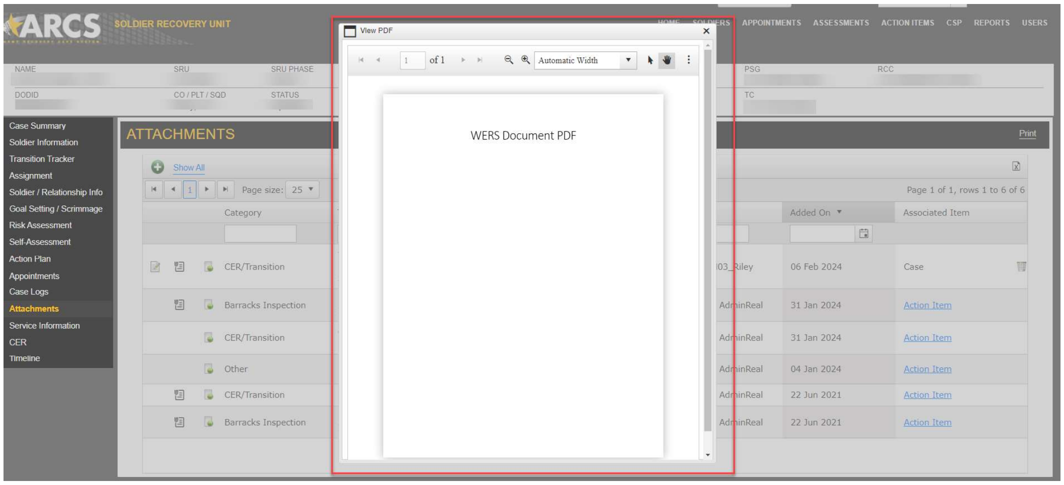
3. Click Submit.

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

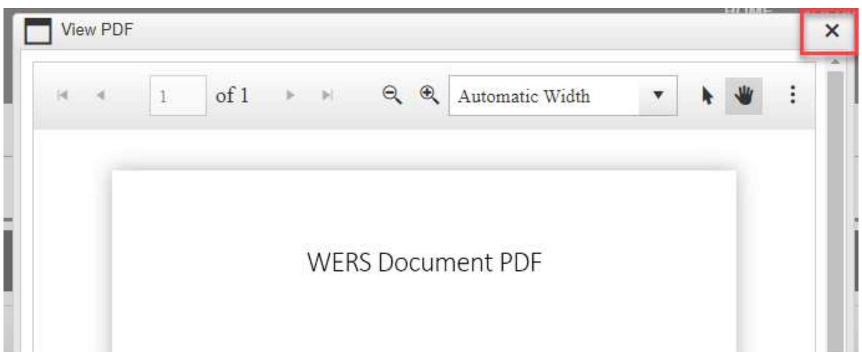
View PDF Attachment

To view the PDF in a pop-up window:

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



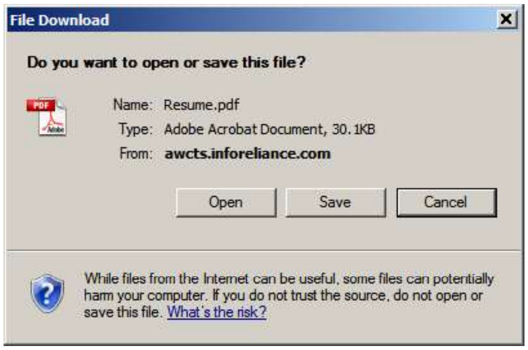
3. Select the X icon to close the window



Download Attachment

To download an attachment:

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

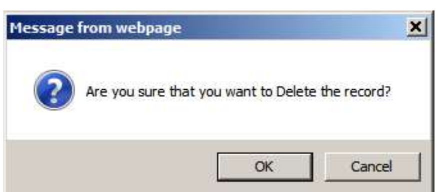


3. Click **Open** to open the attachment, **Save** to save the file to another location (e.g., hard drive), or **Cancel** to stop the download.

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:

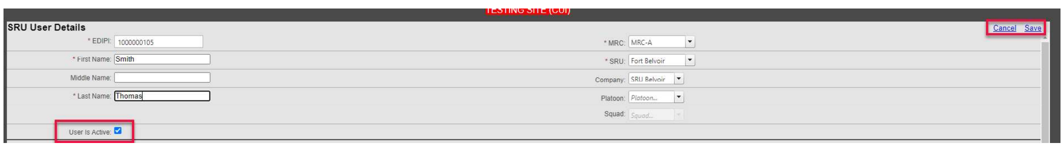
1. Open the User's record by selecting **Edit**.
2. Un-check the **User is Active** check box.

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.



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

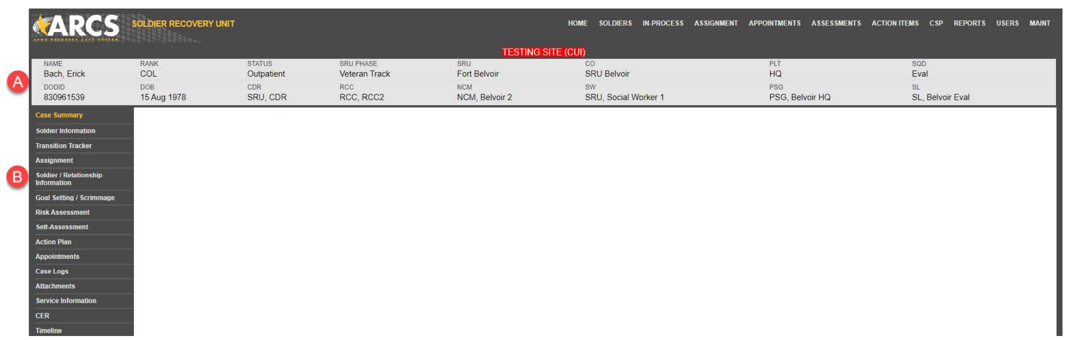
Soldier Case

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

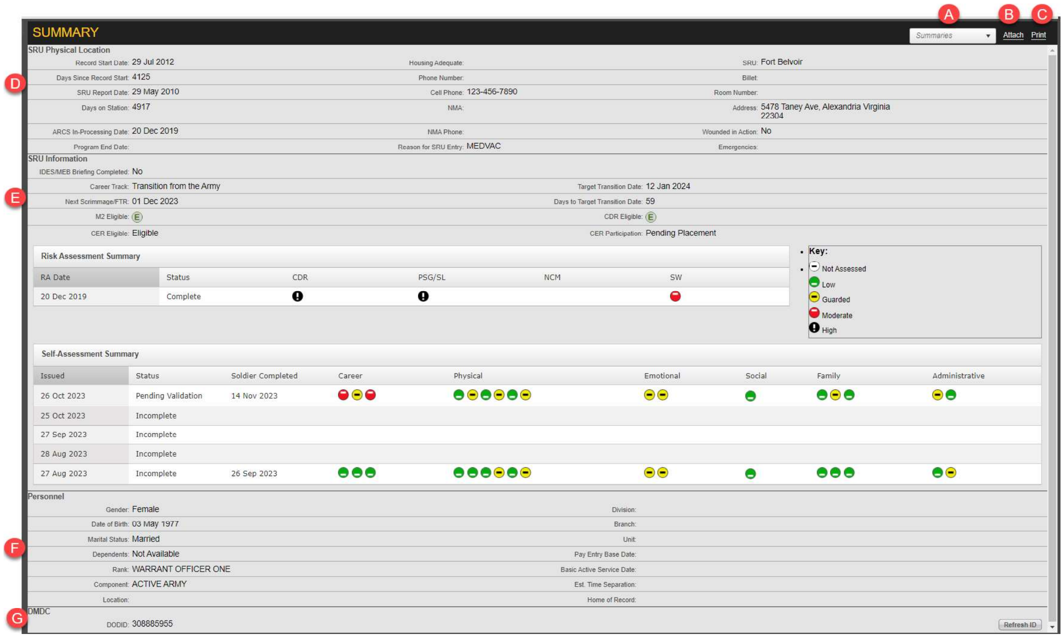
Every case has standard features, as shown below.



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

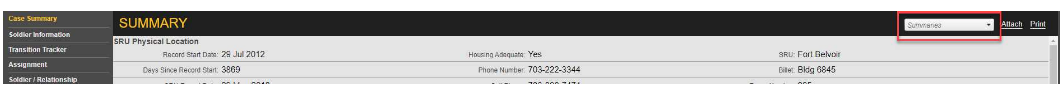


Case Summary Screen

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.

[1]Soldier Recovery Unit

[2]Integrated Personnel and Pay System - Army

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

ARCS **Comprehensive Recovery Plan (CRP) Handbook**

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

Soldier Name:

AOC/MOS:
COMPO: ARMY RESERVE
Reason for SRU Entry: MEDVAC

Gender: Female
Wounded in Action: No

Home Address:
Home Phone:
Cell Phone:
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 Ctrl	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																	

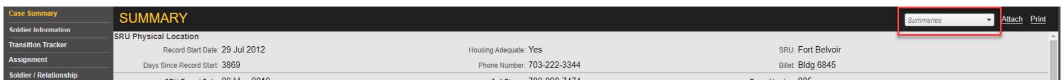
Action Items

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

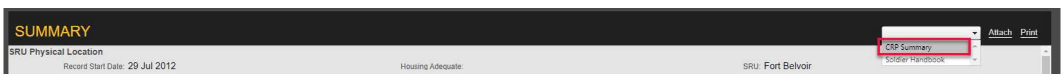
Click **Save PDF** to create a PDF of the handbook or **Close** to return to the Case Summary screen.

Generate CRP Summary

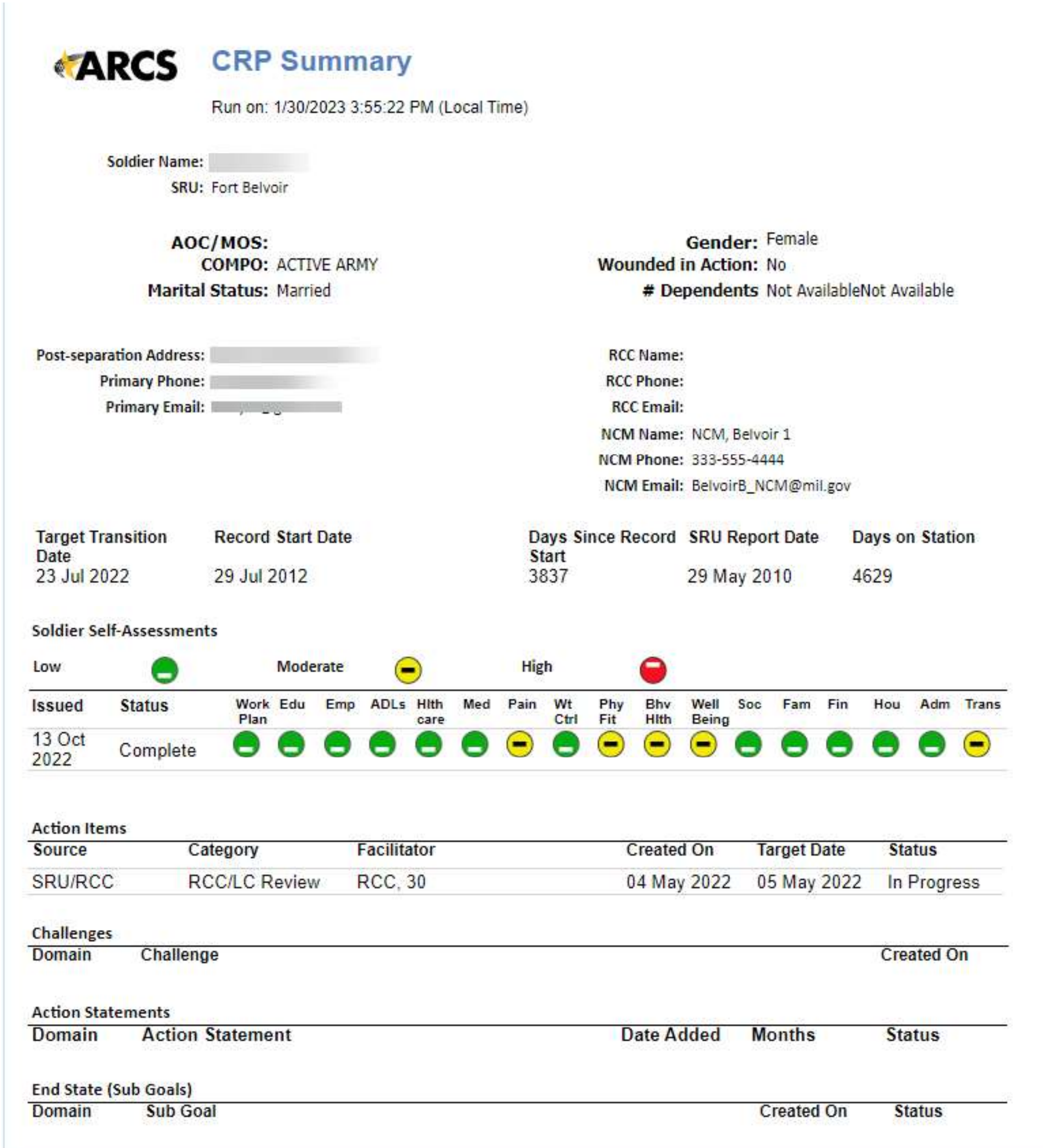
To generate the Comprehensive Recovery Plan (CRP) Handbook, click the summaries drop-down option at the top of the Case Summary screen.



Select the CRP Summary Option.



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



ARCS **CRP Summary**

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

Soldier Name:
SRU: Fort Belvoir

AOC/MOS:
COMPO: ACTIVE ARMY
Marital Status: Married

Gender: Female
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

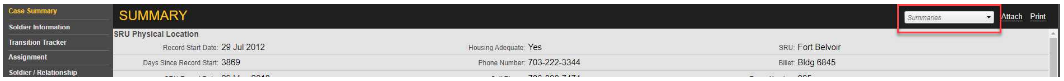
End State (Sub Goals)

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.

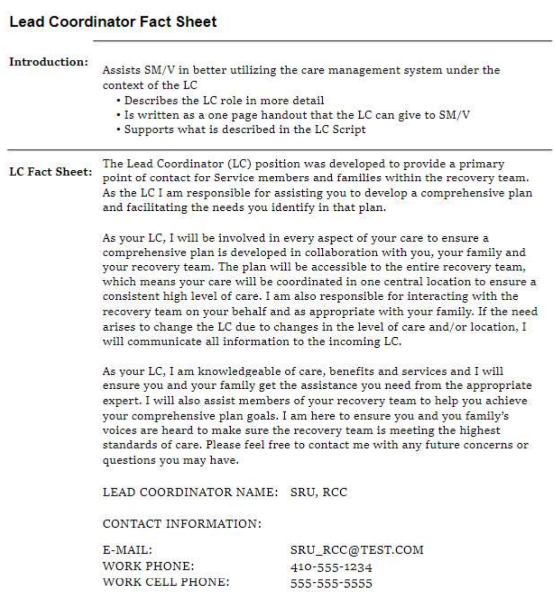
Generate Soldier LC Fact Sheet

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



Select the LC Fact Sheet Option.

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 you 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:

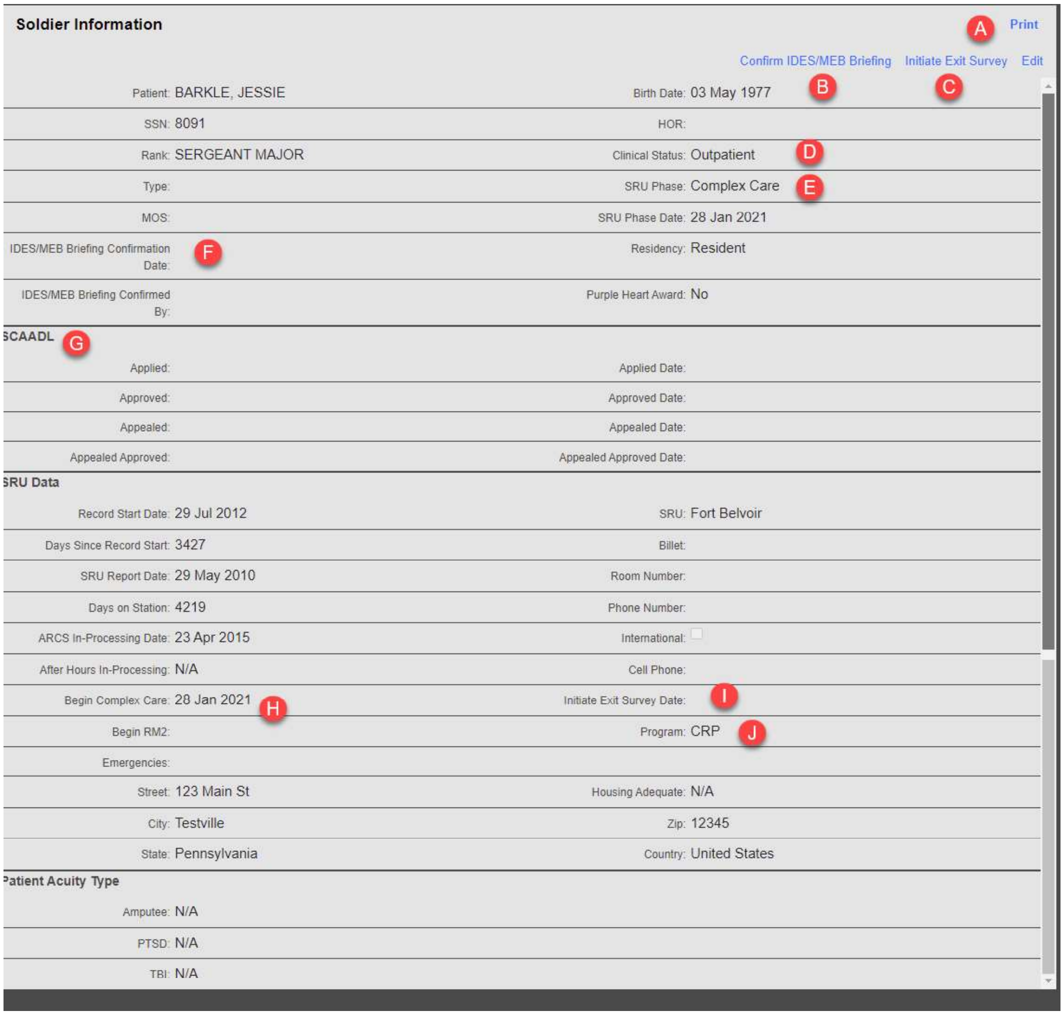
E-MAIL:	SRU_RCC@TEST.COM
WORK PHONE:	410-555-1234
WORK CELL PHONE:	555-555-5555

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 Screen Items

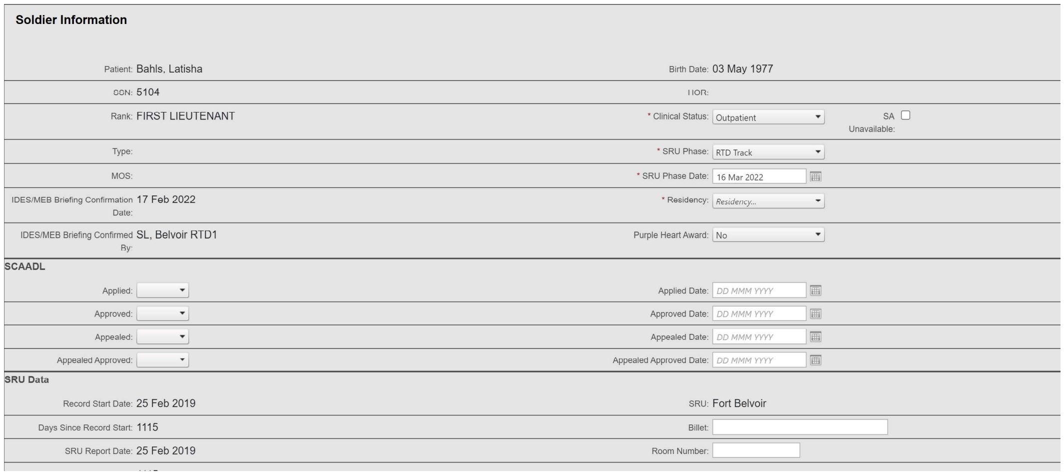
Label	Name	Description
A	Print button	Click print to print the Soldier Information page.
B	Confirm IDES/MEB Briefing	Data confirming the Soldier has received the IDES/MEB briefing.
C	Initiate Exit Survey	Click to initiate the notification email for the SRU Exit Survey.
D	Clinical Status	Select Inpatient, 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 Briefing	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.



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.

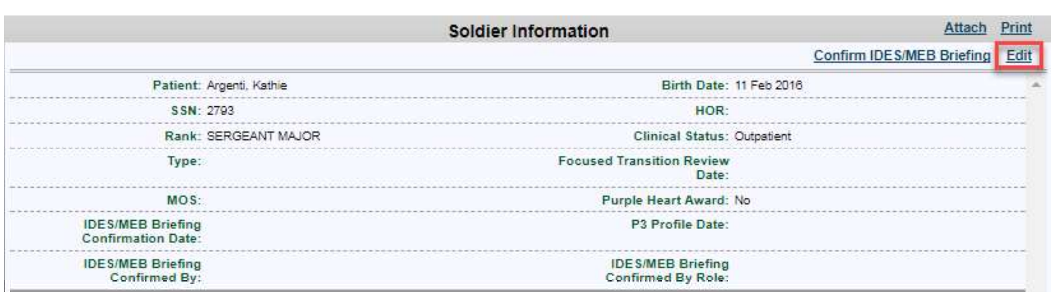
Clinical Status Related Work Flow

Process	Clinical (Patient) Status Selected	Risk Assessment	Self-assessment
Off-Duty In-Processing	Outpatient	Automatically generated	Not generated
Off-Duty In-Processing	Inpatient	Not generated	Not generated
Regular In-Processing/Complete In-Processing	Outpatient	Automatically generated	Not generated
Regular In-Processing/Complete In-Processing	Inpatient	Not generated	Not generated
Initial Change from Inpatient to Outpatient (Soldier was in-processed as inpatient)	Outpatient	Automatically generated if no Risk Assessment has ever been completed in the Soldier'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.

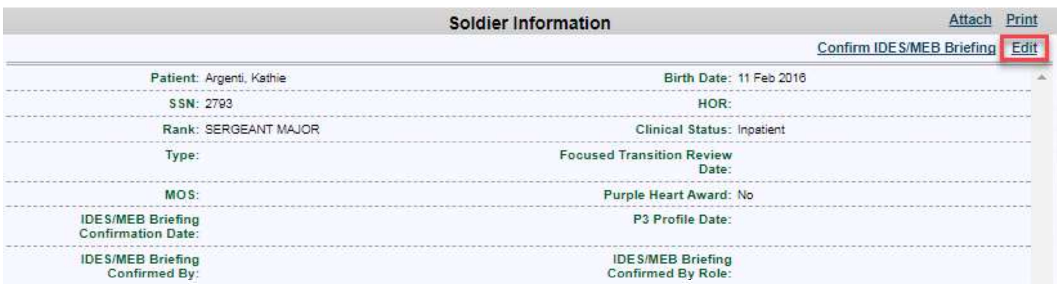


2. Select "Inpatient" as the Clinical Status.
3. Select **Save** on the Soldier Information page to save the changes, or **Cancel** to abandon the changes.
4. Saving will automatically change the Self-assessment Availability to "Unavailable" which will cancel any open self-assessment. See Update Availability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



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.

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:

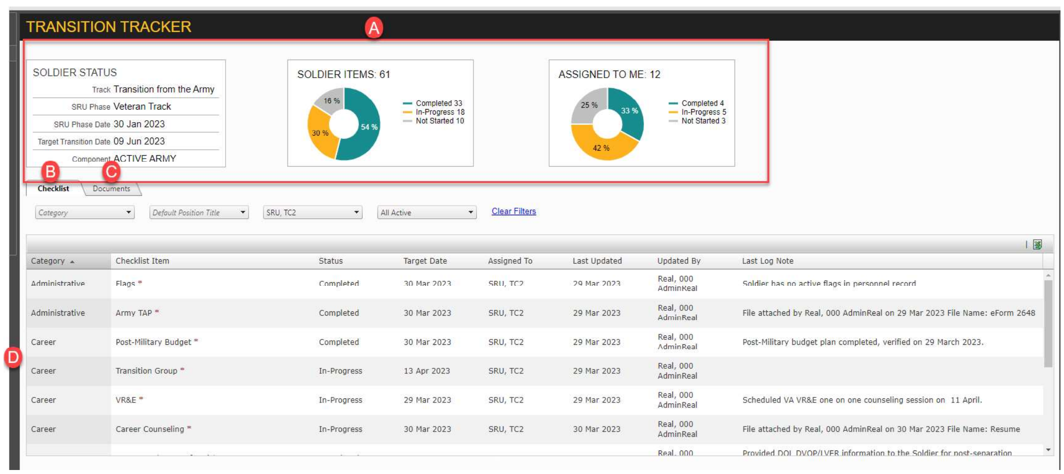
1. From the Soldier Information screen, select "**Confirm IDES/MEB Briefing**" at the top of the page.
2. Click "**OK**" to confirm the briefing, or **Cancel** to close the window without confirming.
3. Once confirmed, the following fields are automatically updated in ARCS:
   - IDES/MEB Briefing Confirmation 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.

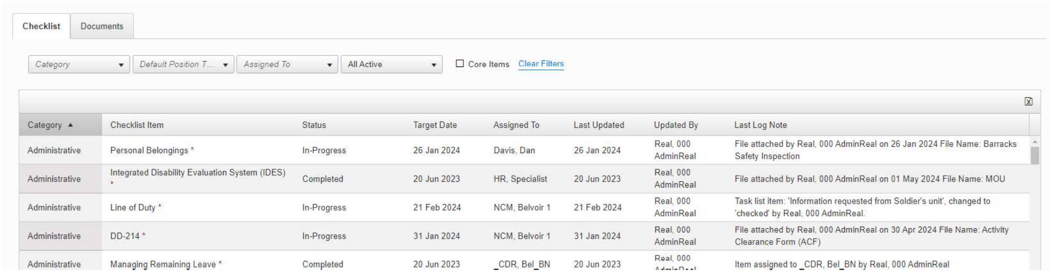
Transition Tracker (T2) Screen

Label	Name	Description
A	Soldier Dash-boards	• 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 Check-list	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 Solider or SRU. The required checklist items have been identified with a *.



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.

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 Pos-ition Title	Chose this option to filter by the recommended default pos-ition. 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 *The default view is **All Active.***

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

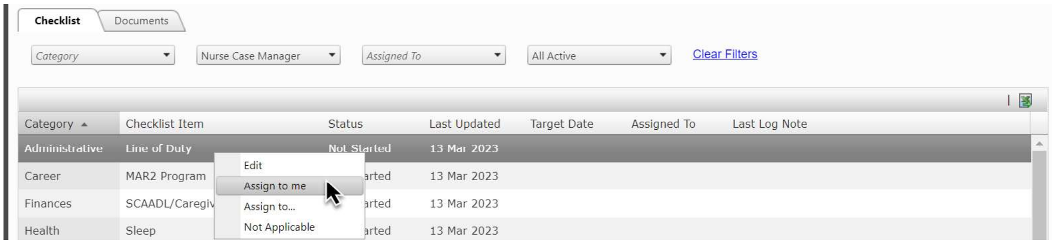
This section describes how to assign, remove, or reinstate Checklist Items.

Assign Checklist Item

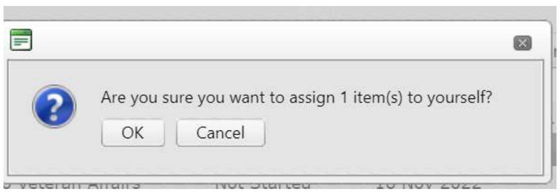
This section describes how to assign the Checklist Items to yourself or Cadre in the Soldier's SRU.

To assign a checklist item to yourself:

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

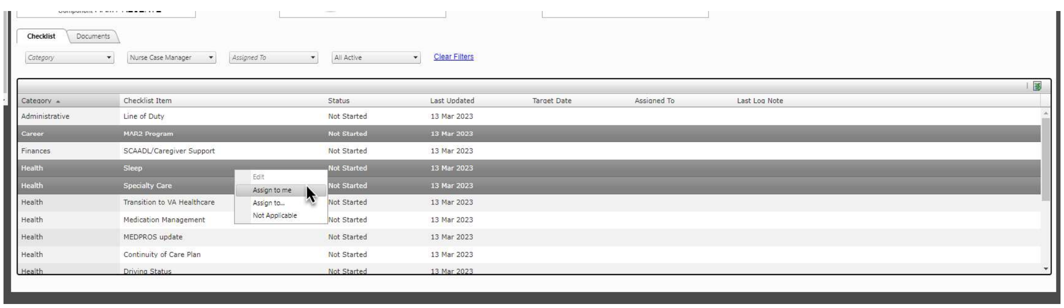


3. Select **OK**

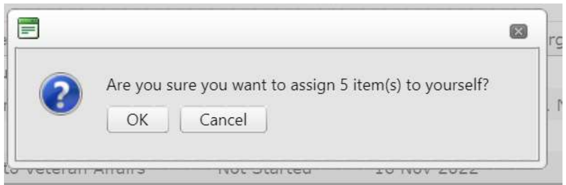


To assign more than one checklist item to yourself:

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

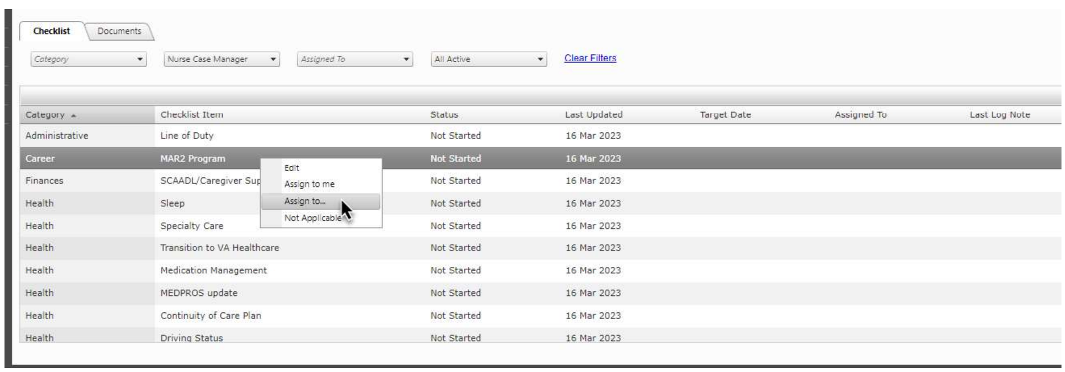


4. Select **OK**



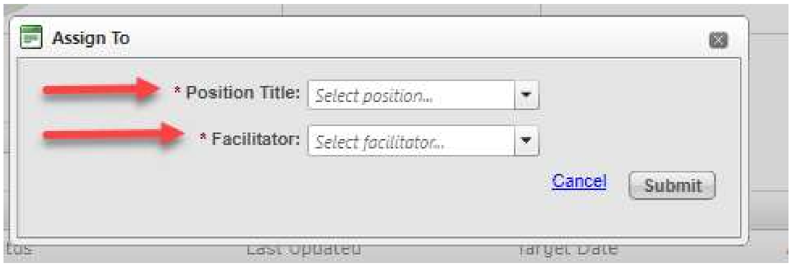
To assign a checklist item to Cadre:

1. Right Click on the Item



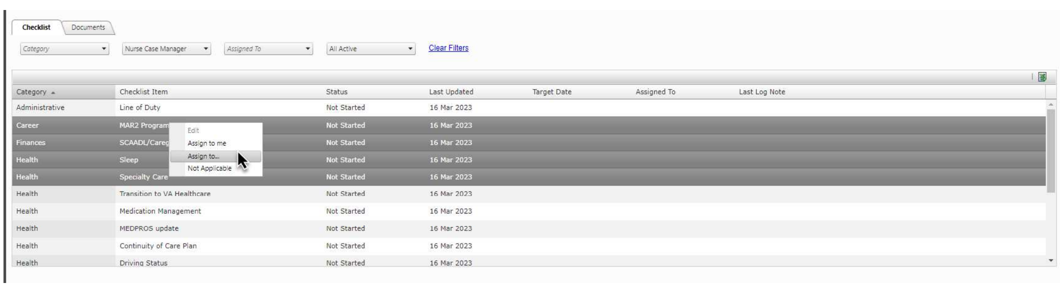
2. Select **Assign to...**
3. Select the **Position Title**
4. Select the **Facilitator**
    - The Cadre in the assigned SRU will populate in the drop-down

5. Click Hit **Submit**



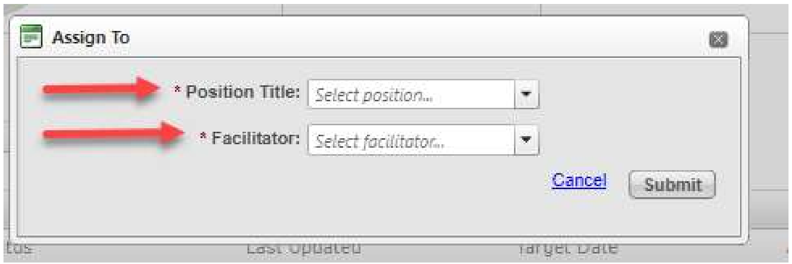
To assign more than one checklist item to Cadre:

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



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**

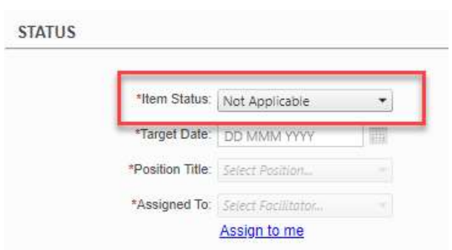


Remove a Checklist Item

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

To mark a checklist item as Not Applicable:

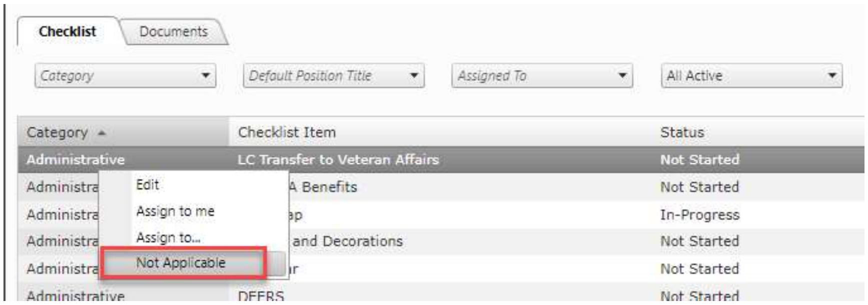
1. Double click on thee checklist item
2. Update the status to **Not Applicable**



3. Select Continue

OR

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

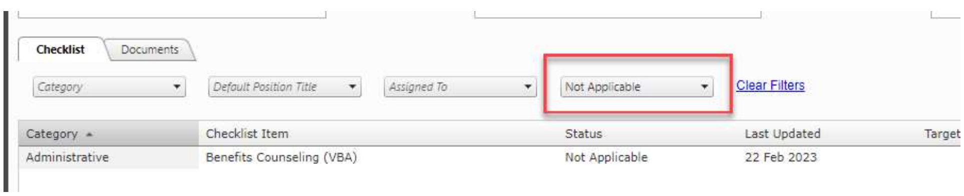


To update a more than one statuses to Not Applicable:

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 Applic-able** drop-down choice on the grid filter.

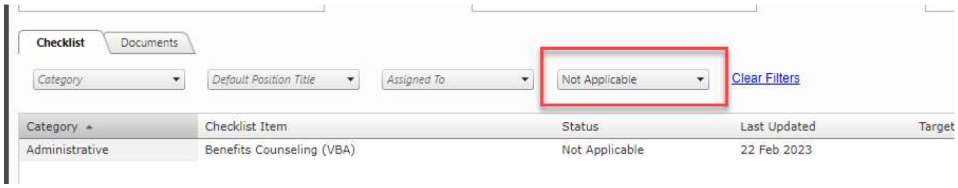


A Not Applicable Checklist Item can be reinstated to in-progress or completed, if needed. Reinstate Checklist Item directions can be found here.

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

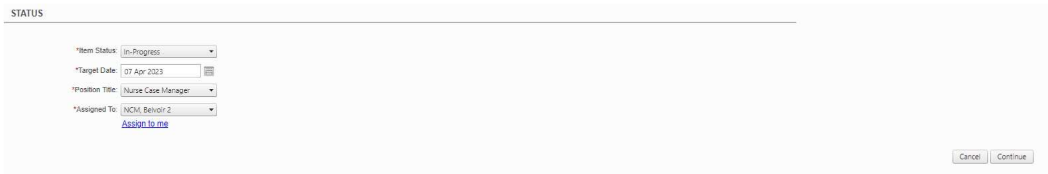
This section describes how to update a Checklist Item to **In-Progress**.

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

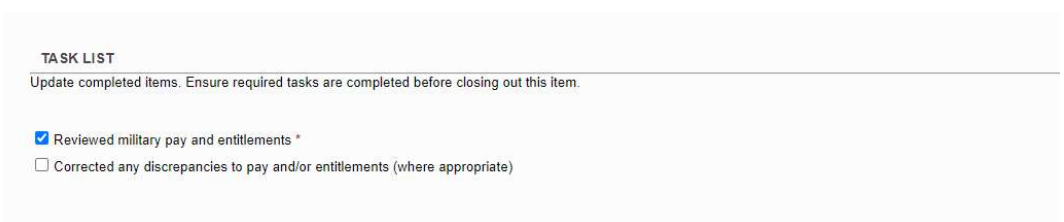


6. Proceed to updating the Update Task List, Add Checklist Item Log Note, or Add Checklist Attachment (if applicable).

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.



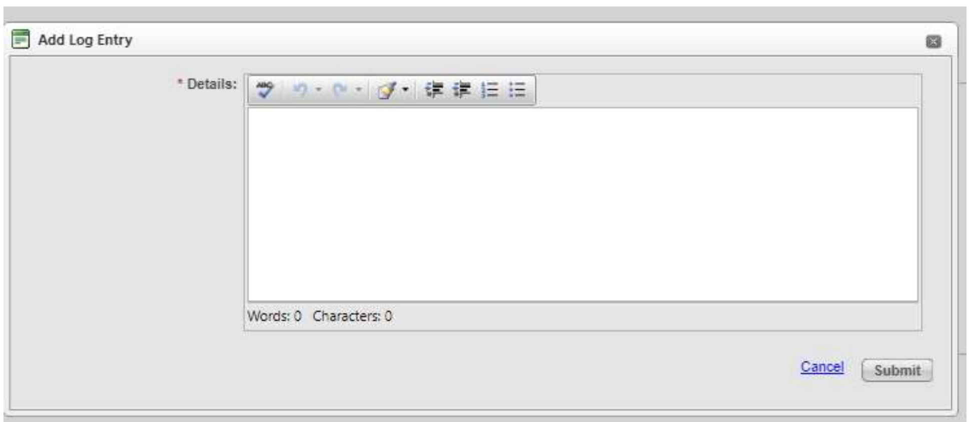
To update the task list, select the check box(s) for all completed Task List Items (if applicable).

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	MAR2 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/PDHRA	Not Started	23 Feb 2023		NCM, Belvoir 2	
Health	Sleep	Completed	23 Feb 2023	23 Feb 2023	NCM, Belvoir 2	Set-Up Initial Sleep and Snoring Apnea Treatment Appointment on 2/1.
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	

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

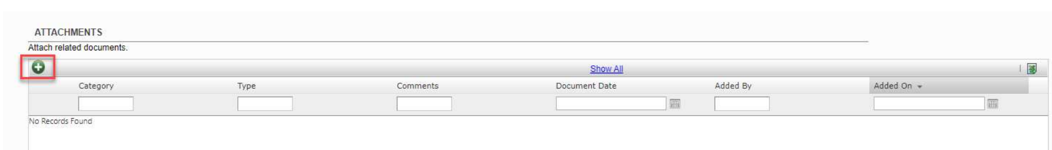
Log Notes are Automatically Added When:

- 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 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

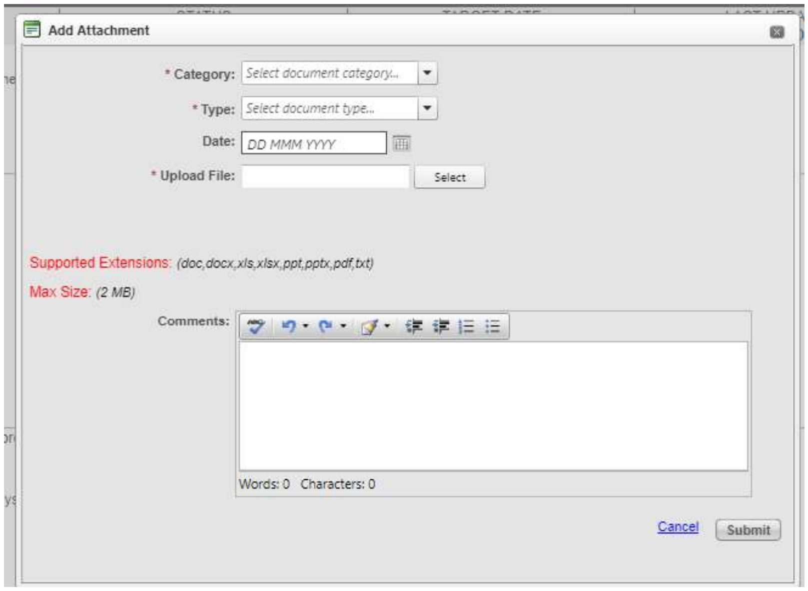
Add Checklist Attachment

To add an attachment to the checklist item:

1. Click the Add icon above the Attachments table.



2. The Add Attachment window opens.



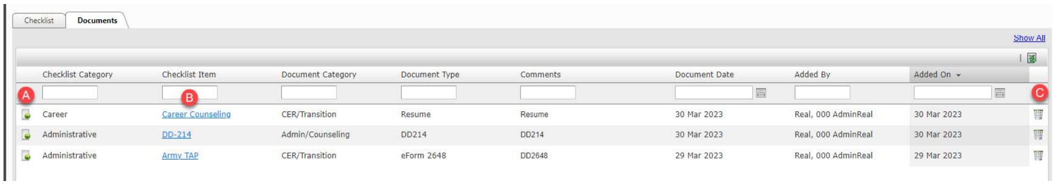
3. Enter information for all required fields. Required fields are marked with an asterisk (*).
4. Select a file and then click Open. When the file is done uploading, the circle icon will turn green.
5. If the wrong file is selected, select Remove.
6. Click Submit to add the attachment or Cancel to close 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.



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

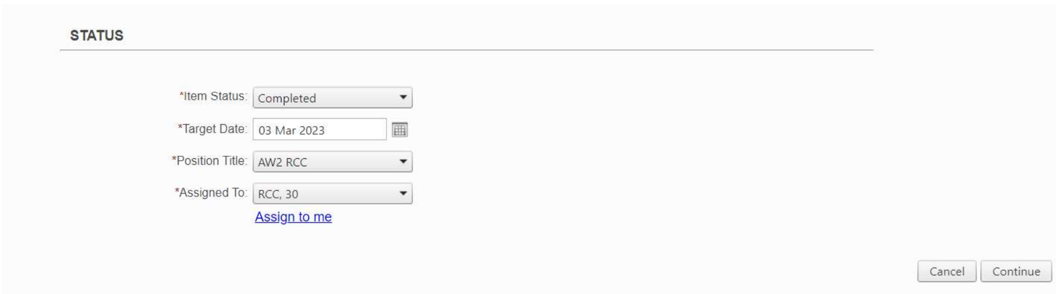
This section describes how to update a Checklist Item to **Completed**.

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

1. Double click on thee 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



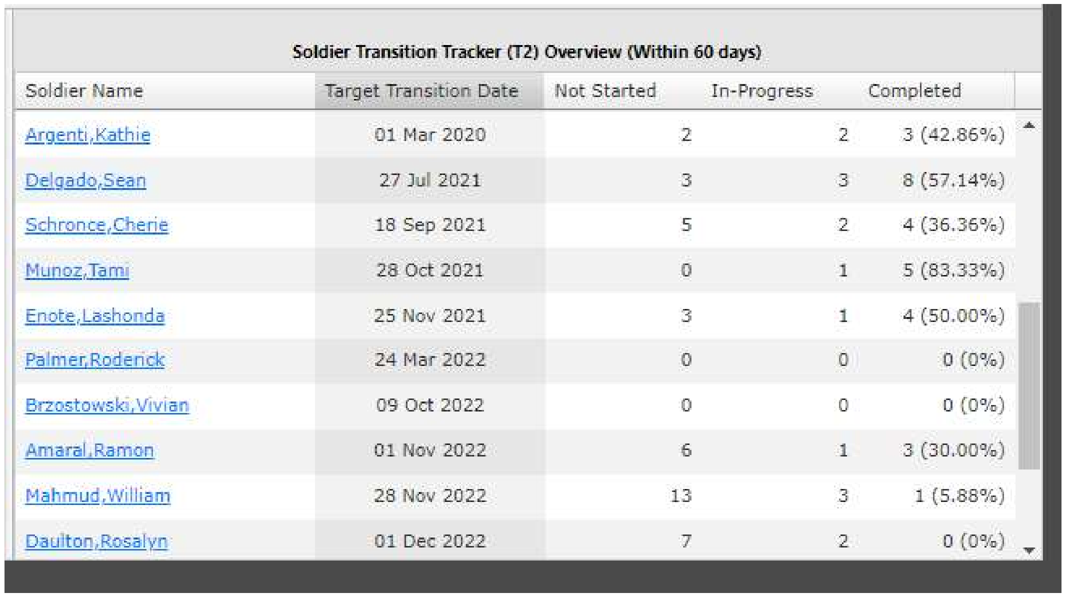
6. Proceed to updating the Update Task List, Add Checklist Item Log Note, or Add Checklist Attachment (if applicable).
7. Select Save & Close to update the status to **Completed** or cancel to close the window without updating the status.

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



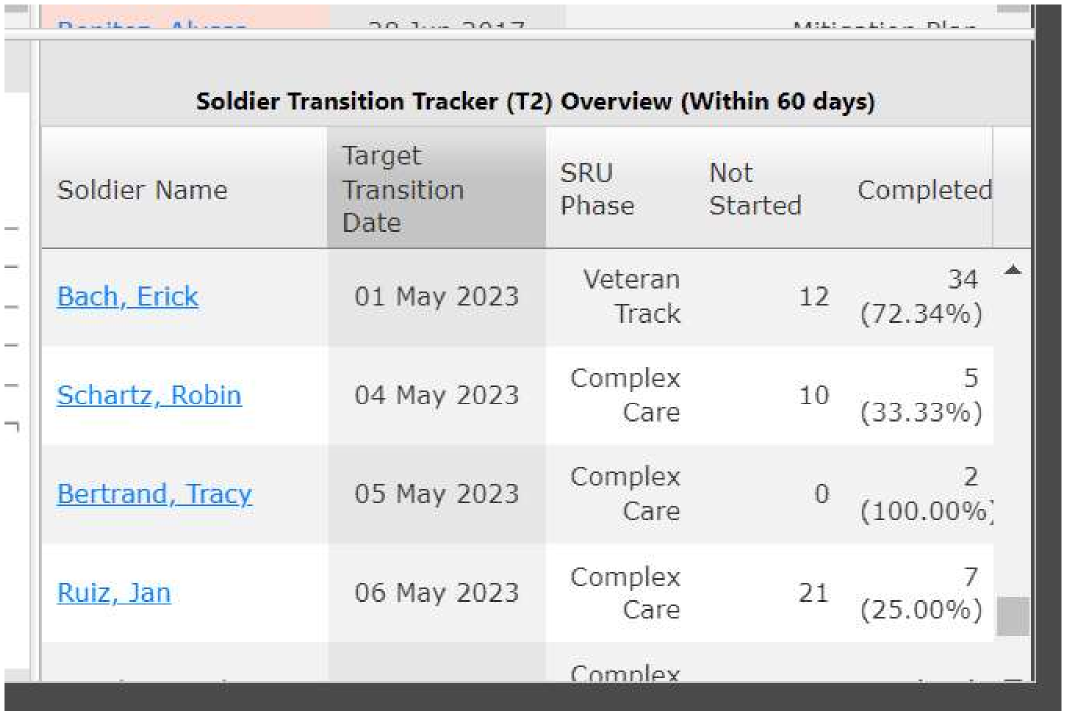
Soldier Transition Tracker (T2) Overview (Within 60 days)

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)

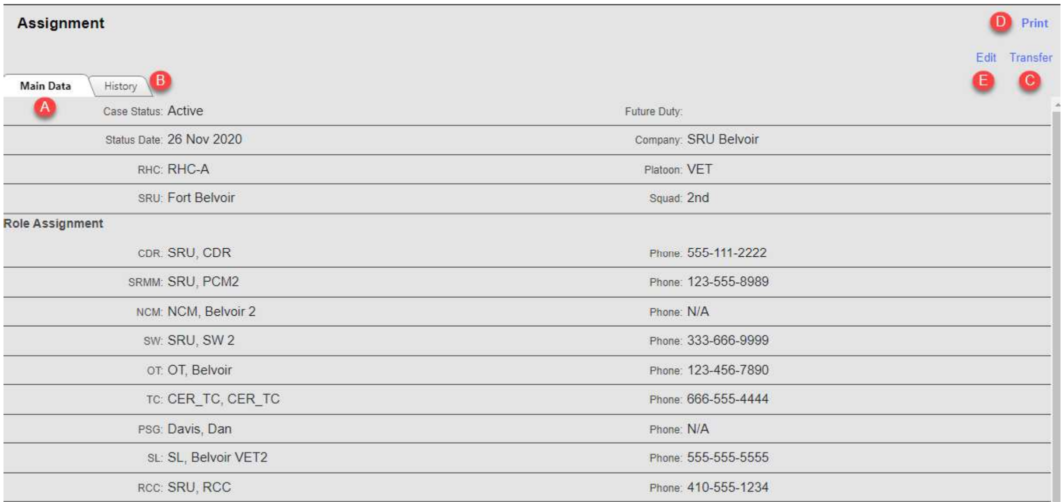
Soldier Name	Target Transition Date	SRU Phase	Not Started	Completed
Bach, Erick	01 May 2023	Veteran Track	12	34 (72.34%)
Schartz, Robin	04 May 2023	Complex Care	10	5 (33.33%)
Bertrand, Tracy	05 May 2023	Complex Care	0	2 (100.00%)
Ruiz, Jan	06 May 2023	Complex Care	21	7 (25.00%)

Launch the Soldier's Transition Tracker home page by clicking on the Soldier's name hyperlink.

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 Data Page

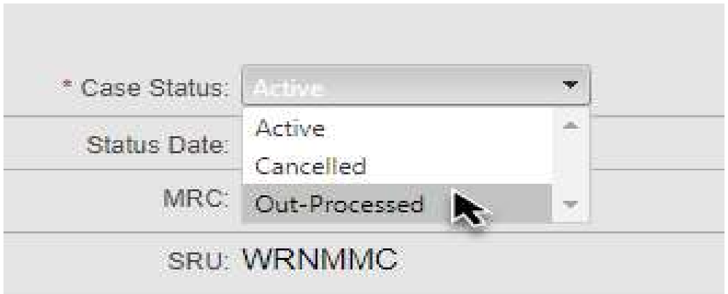
Label	Name	Description
A	Main Data tab	Use this tab to view case data. Additionally, you can: ■ Manage assignments ■ Transfer the case
B	History tab	Use this tab to view the case assignment history
C	Transfer button	Click Transfer to transfer the case to another SRU or company
D	Print button	Click Print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



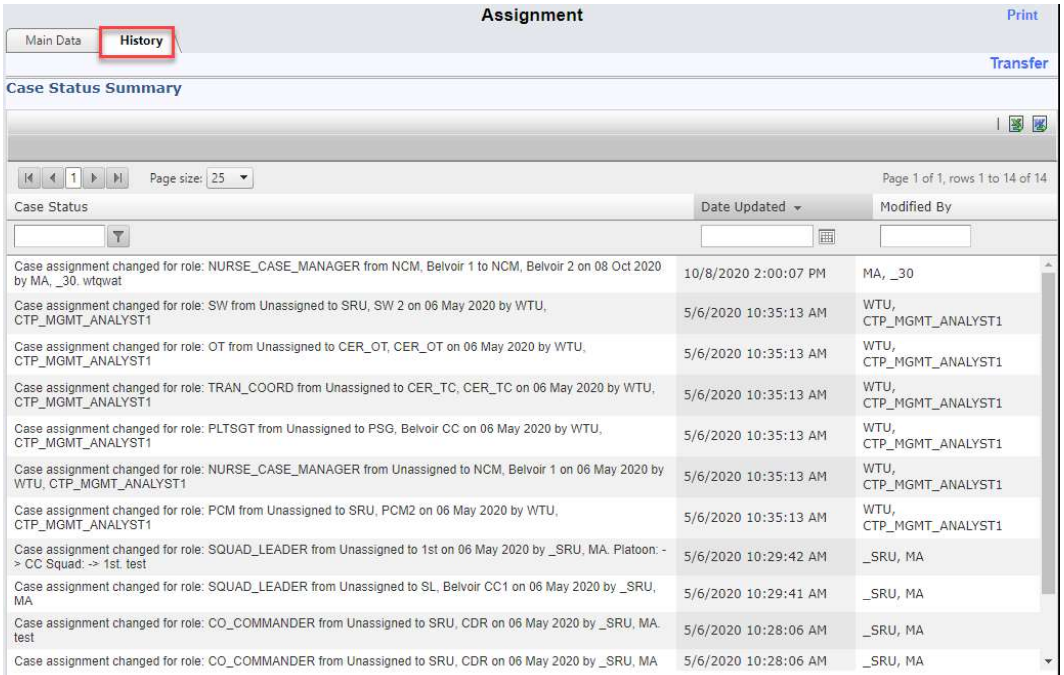
2. Select a platoon and squad for the Soldier using the list boxes if applicable.
3. Update Role Assignment information using the list boxes.
4. If Action Plans assigned to losing Cadre should not be re-assigned to the gaining Cadre, de-select the "Reassign Action Plans" check box.

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.

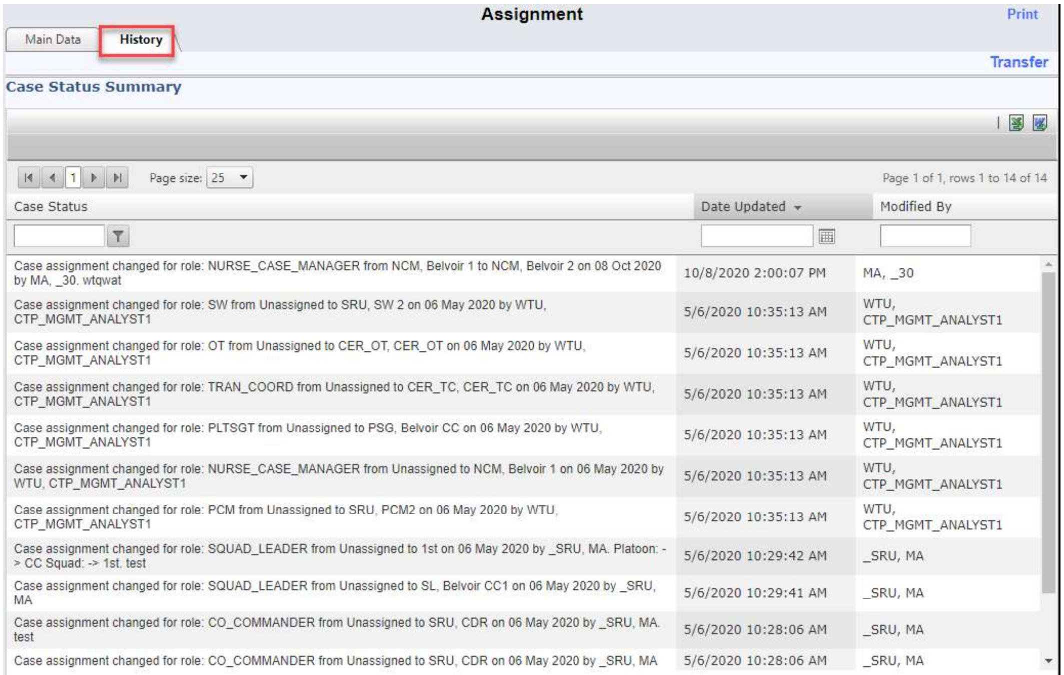
Assignment History

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



Assignment History

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



Out-Process Case

Soldiers who no longer require SRU support can be out-processed.

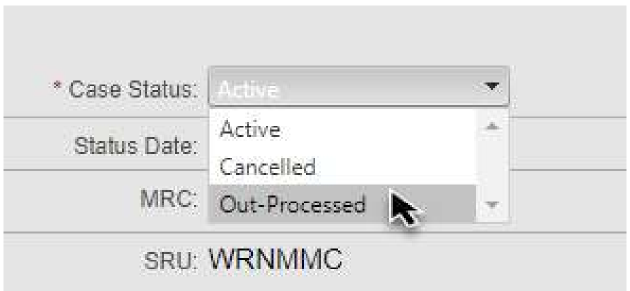
PERMISSIONS: Program Analyst, HR Specialist, Administrator

Before out-processing a case, ensure that all case related actions are completed by SRU cadre.

- Post-Separation Address (REQUIRED), phone and email entered in Contact record
- Action Plans closed out
- Open assessments competed
- CER activities have end dates
- Exit interview completed
- All dates and documents uploaded
- Goal Setting updated

To out-process a case:

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.



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.

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.

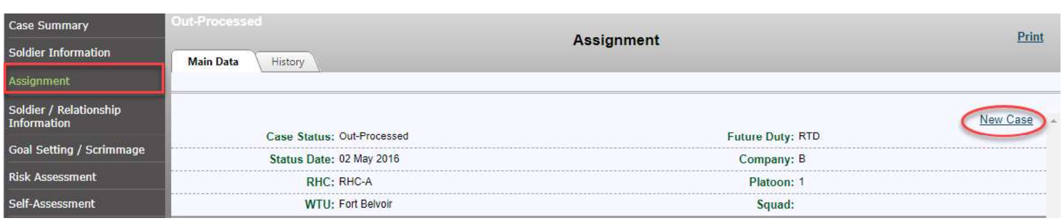
New Case (Soldier returning to SRU program)

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.



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.

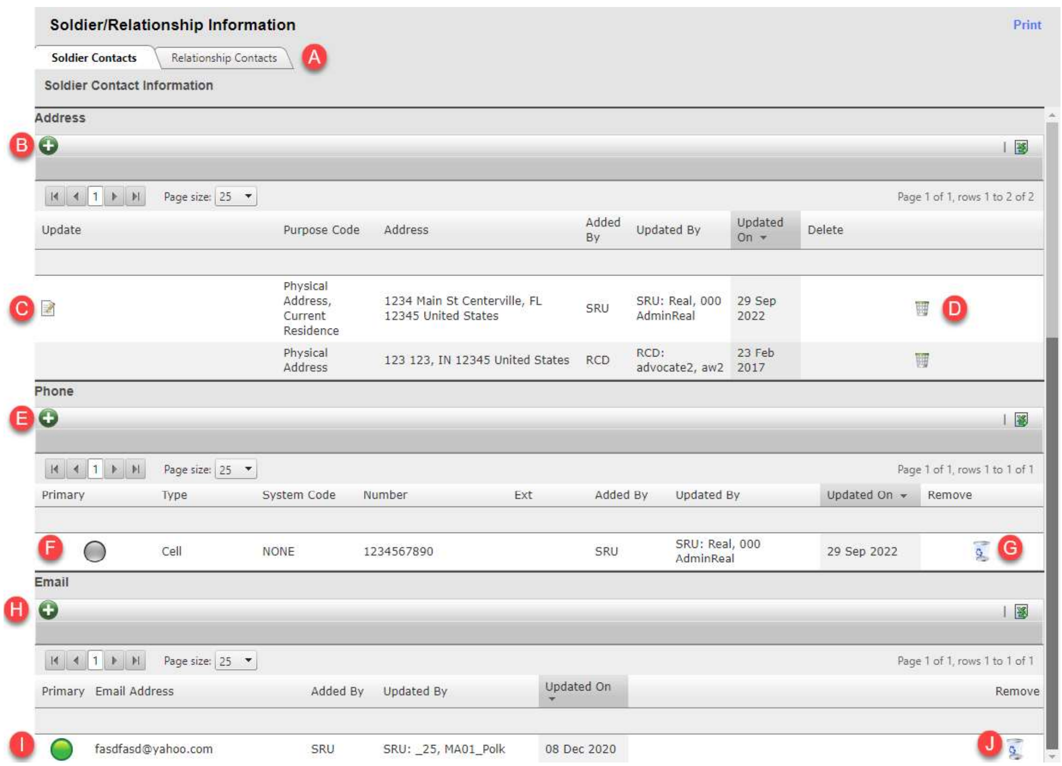
Soldier / Relationship Information

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.



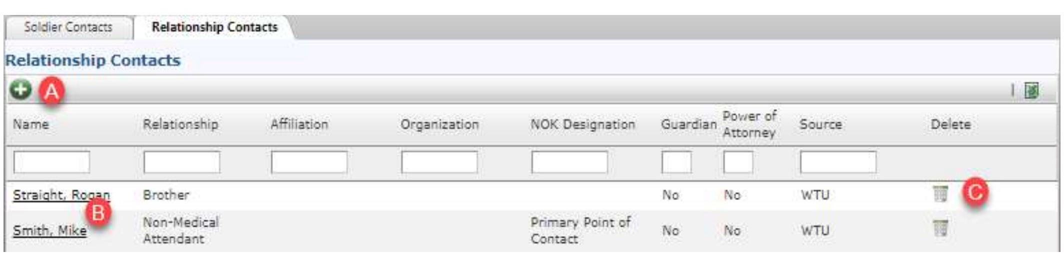
The following table describes the items labeled in the Soldier Contact Tab:

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.



Relationship Contacts

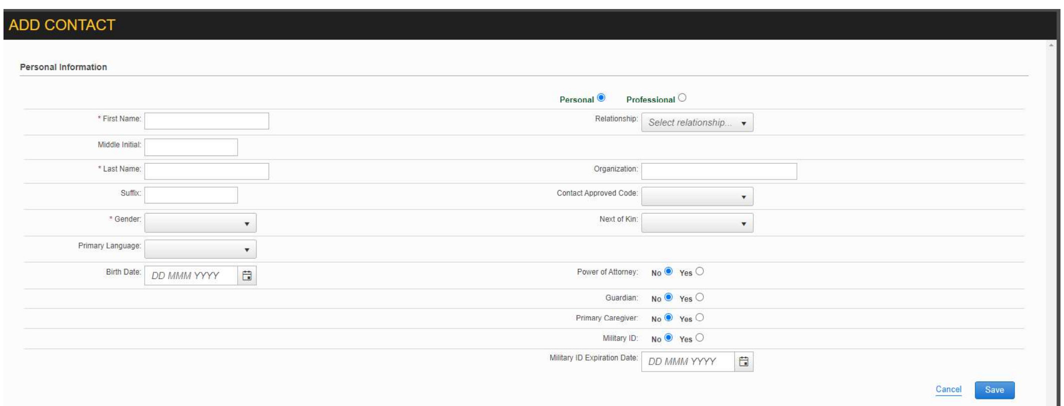
Label	Name	Description
A	Add Relationship Contact icon	Click the Add icon to add a new relationship contact
B	Contact Name hyperlink	Click a contact name hyperlink to view details for a relationship contact
C	Delete Relationship Contact icon	Click the Delete icon to delete a relationship contact

Related Topic: Manage Soldier and Relationship Contact Information

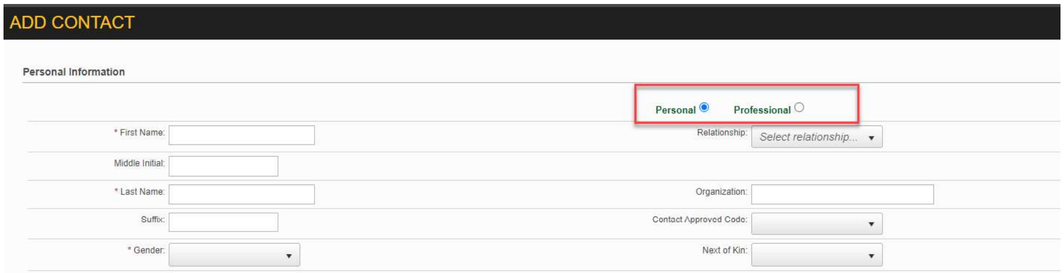
Add Relationship Contact

To add a relationship contact:

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



2. Select either the Personal or Professional option.



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

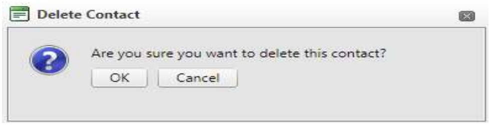
To edit a relationship contact:

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

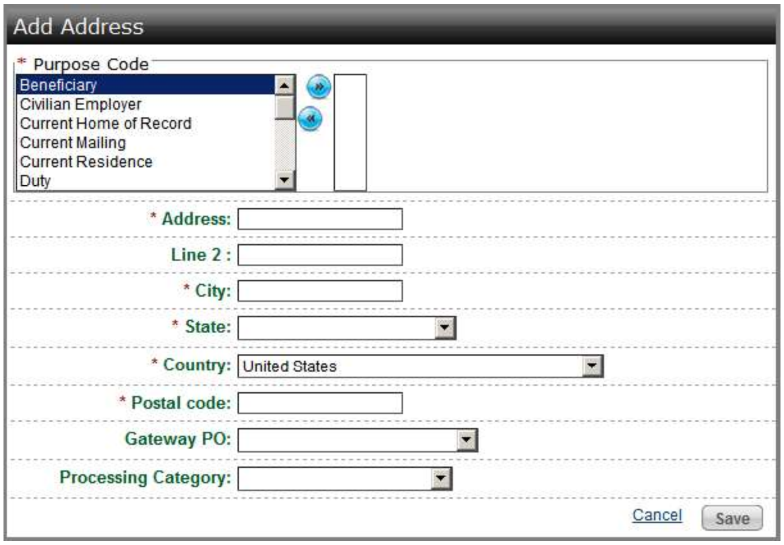
PERMISSIONS: Program Analyst, HR Specialist, Administrator, Squad Leader, Platoon Sergeant, RCC, Nurse Case Manager, Social Worker and Social Service Representative

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.

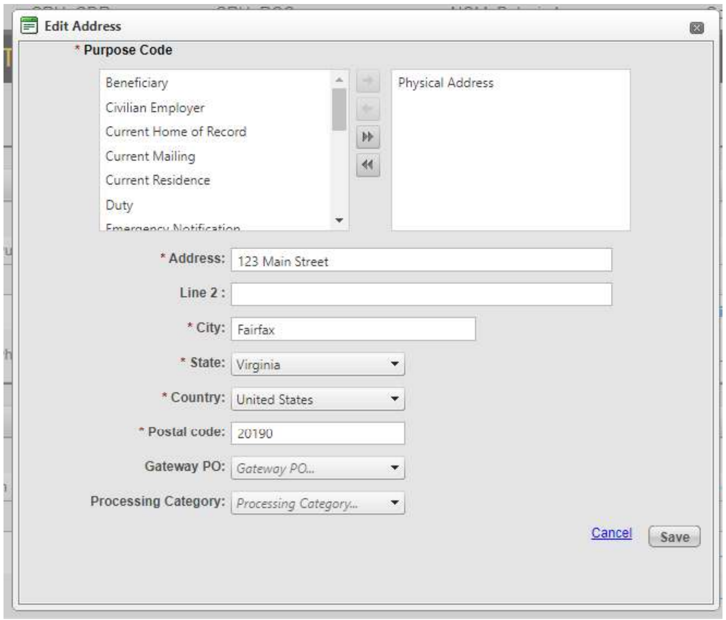
NOTE: Each Purpose Code may only be used for one address record per contact.

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.

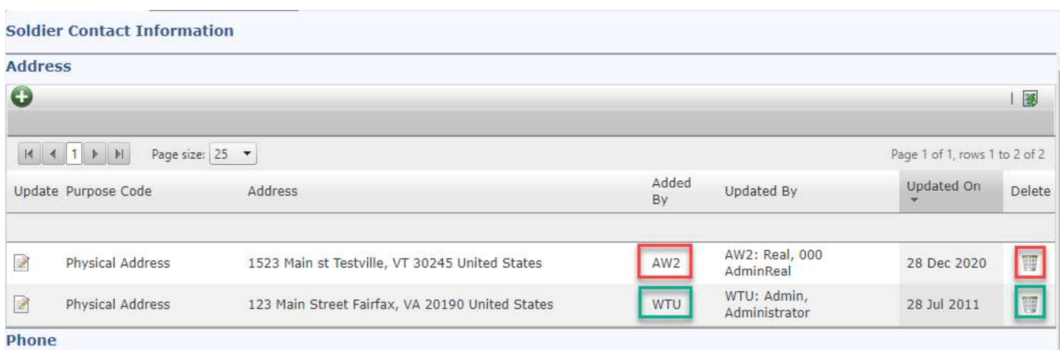
NOTE: This action cannot be undone.

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:

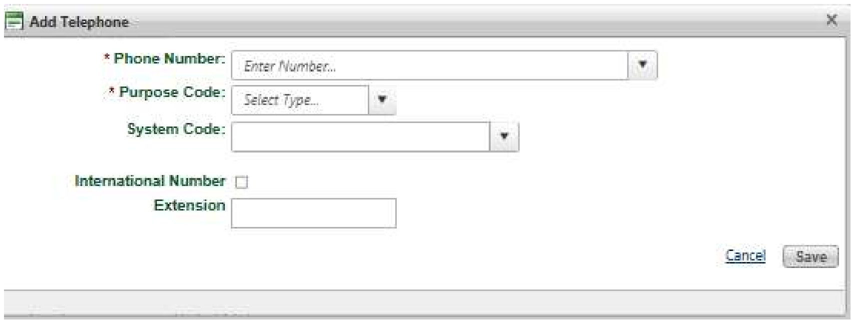
- Address Added By RCD module - trash can icon will HIDE the address from the SRU module only
- Address Added By SRU (active) module - trash can icon will DELETE the address



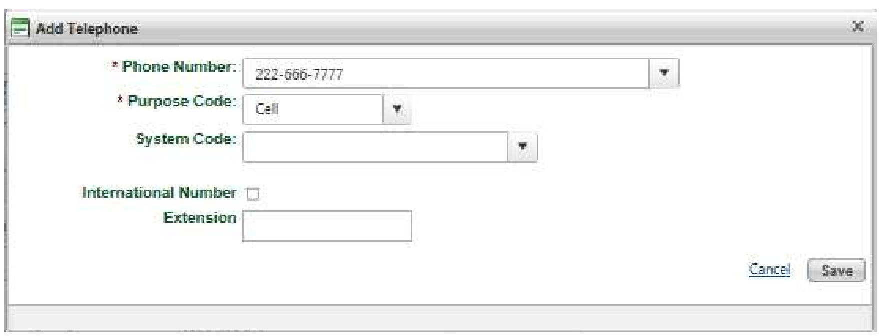
Add Phone Number

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:

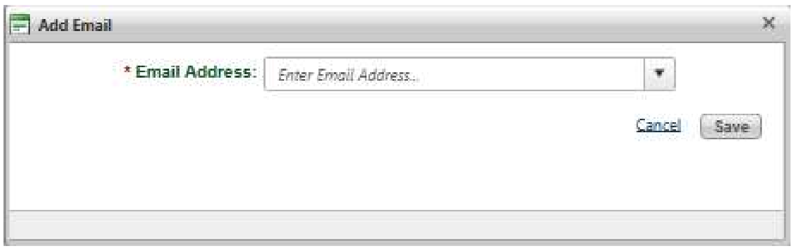
1. Click the Remove icon to the right of the phone number.

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:

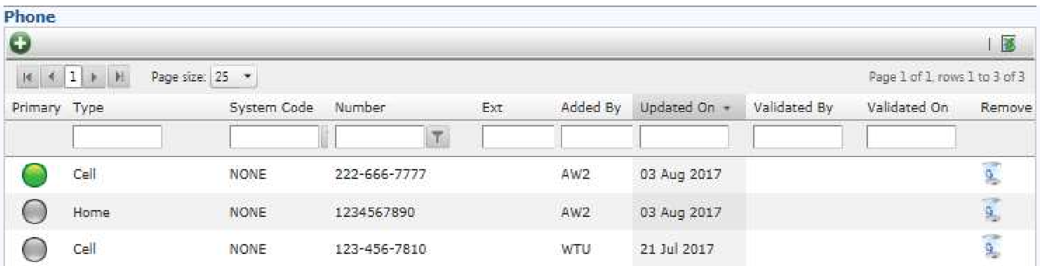
1. Click the Remove icon to the right of the email address.

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.

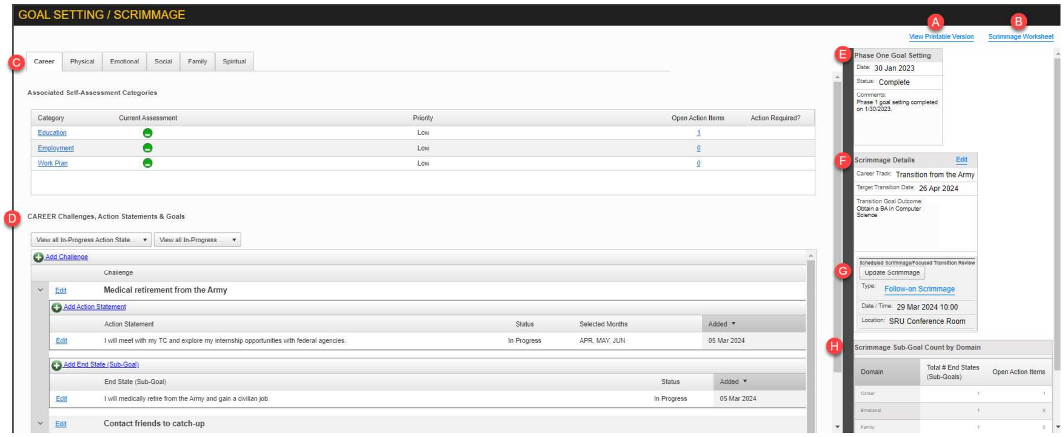


Remove the primary indicator by selecting another email or phone number on the grid, or click the green circle to deselect.

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.



Scrimmage and Goal Setting Screen

Label	Name	Description
A	View Print-able 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- Assess-ment Cat-egories 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-Assess-ment Summary screen ▪ Click on an Open Action Items hyperlink to go to the Action Items screen
D	Challenges, Action State-ments & 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 **NOTE: Use the list boxes to filter the Action Statements and Goals.**
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

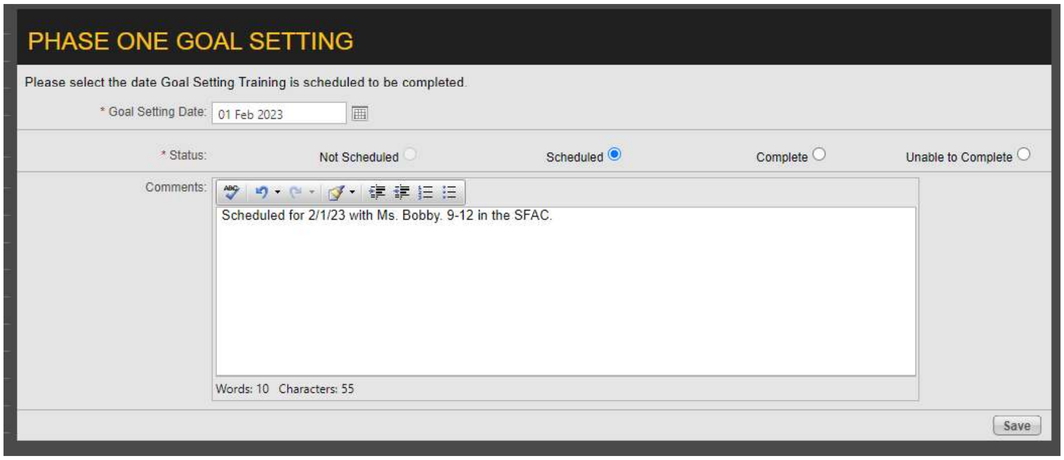
Phase One Goal Setting must be completed before Soldiers or Cadre can:

- Access Goal Setting functionality
- Establish CER eligibillity
- 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.



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.

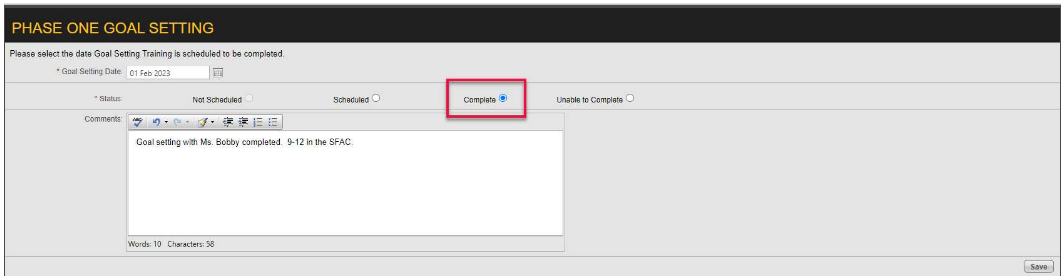
Scheduling Phase One Goal Setting will:

- 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

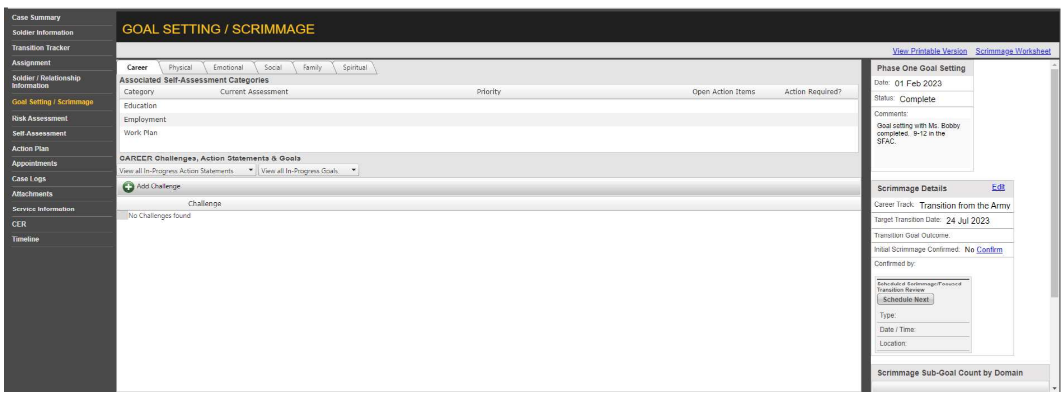
Complete Phase One Goal Setting

To mark Phase One Goal Setting as complete:

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



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



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

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).

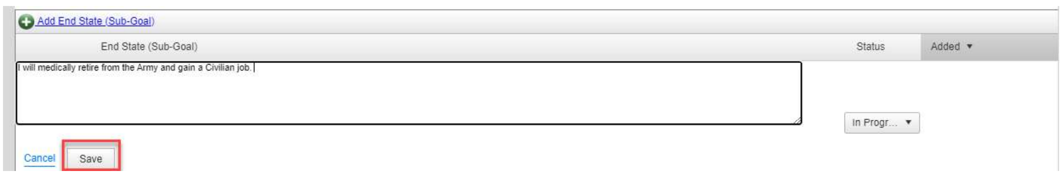
Add End-State (Sub-Goal)

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

1. Expand the Challenge using the black arrow.

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

2. A Sub-Goal area opens.



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 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.

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.

- 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

To add an Action Statement:

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

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

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

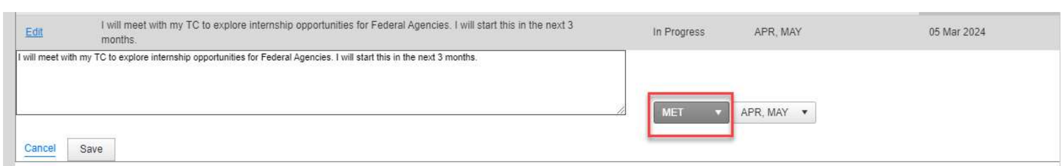
Manage and Close Action Statement

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.

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



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

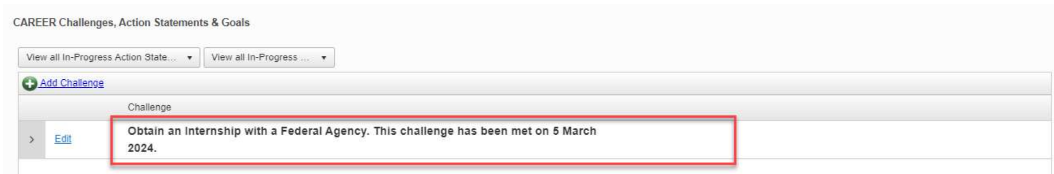
3. Update status to Met or Unmet

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.

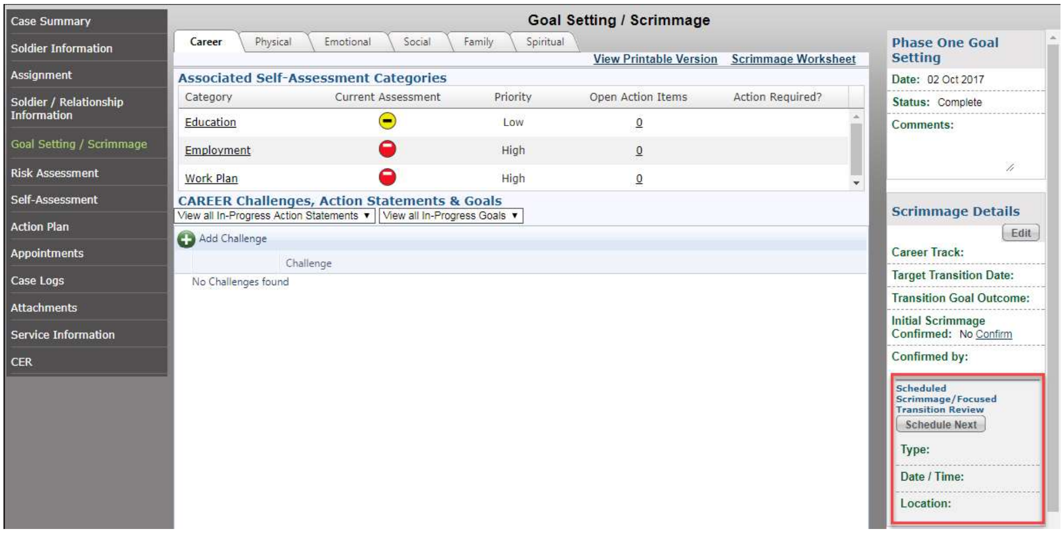
NOTE: The Initial Scrimmage and all follow on Scrimmage/FTRs must be scheduled in the Scrimmage/Goal Setting section of a Soldier's case.

Schedule Initial Scrimmage

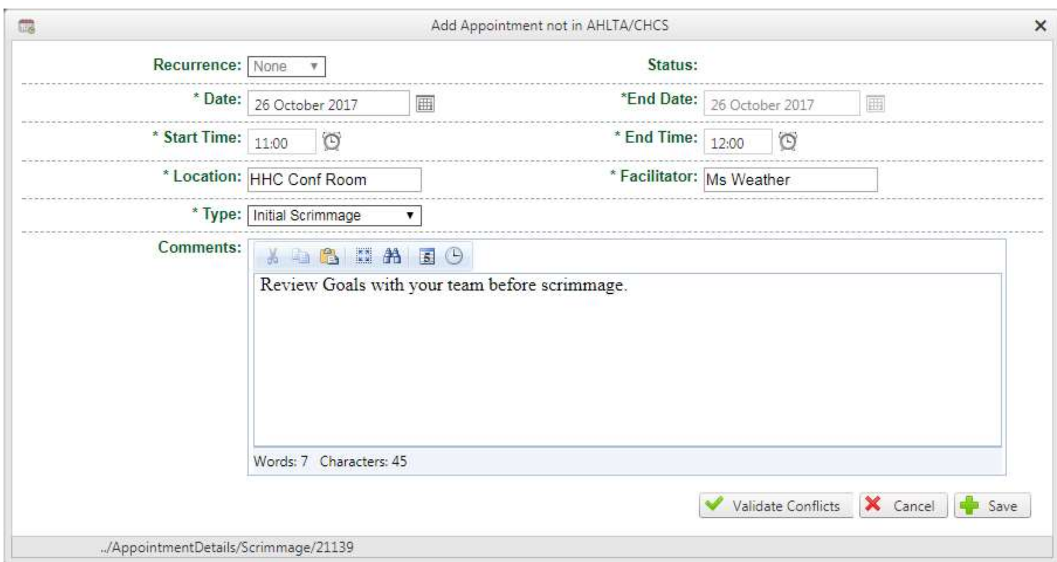
PERMISSIONS: Social Worker, SSA, Program Analyst, Administrator

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.

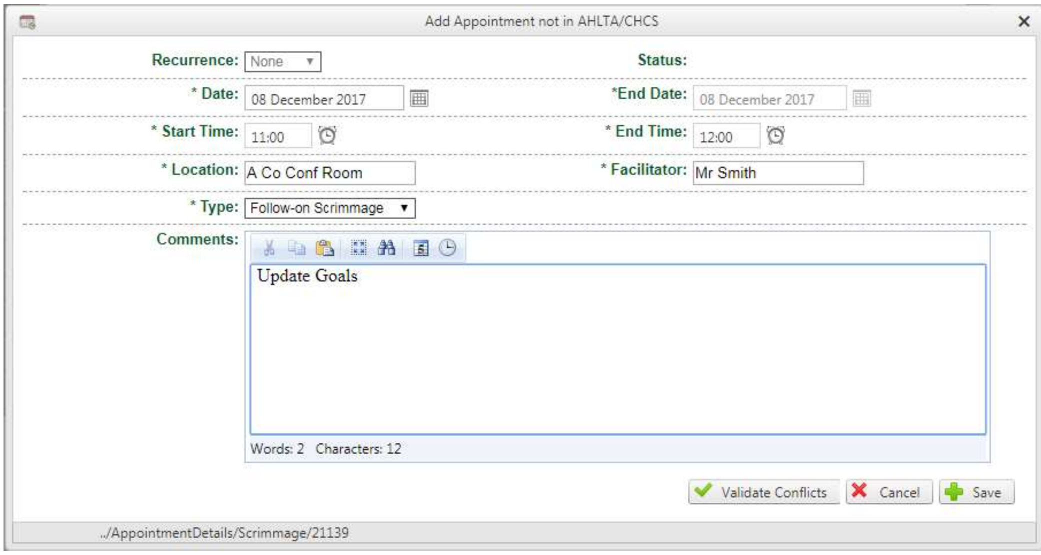
The Appointment will be available from the Goal Setting/Scrimmage and Appointments section of the Soldier's case, and from the Appointments section of the Soldier Module. Additionally, an email will be generated to the Company Commander to .

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.



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

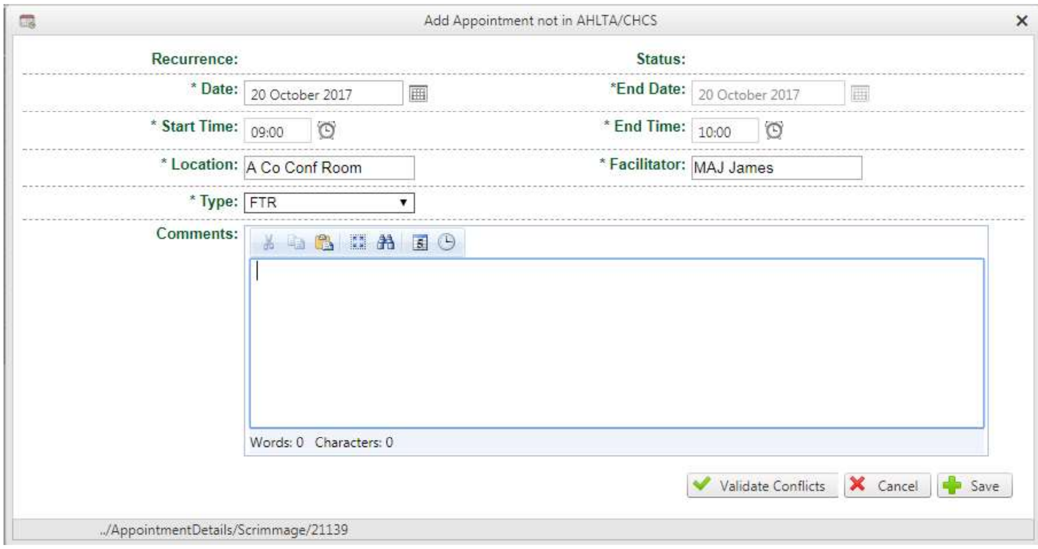
PERMISSIONS: Social Worker, SSA, Program Analyst, Administrator

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.



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

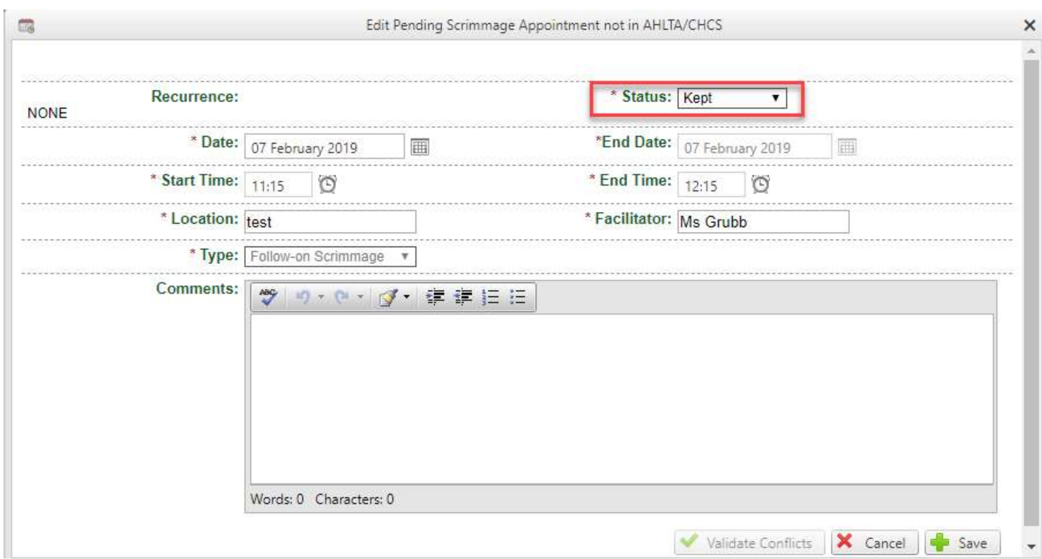
PERMISSIONS: Social Worker, SSA, Program Analyst, Administrator

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.

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



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

Conduct a Scrimmage

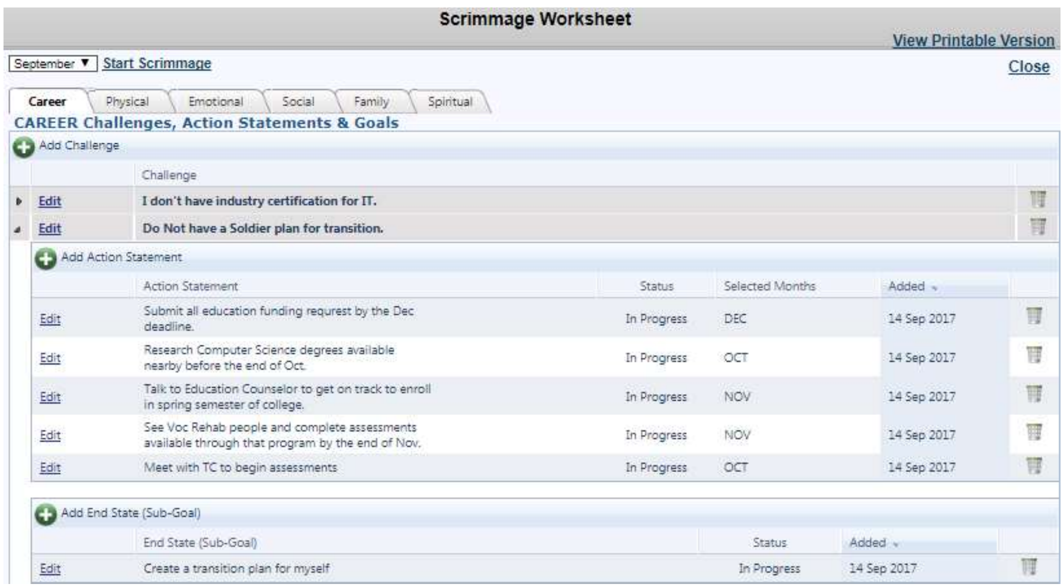
Preparation:

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.



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.

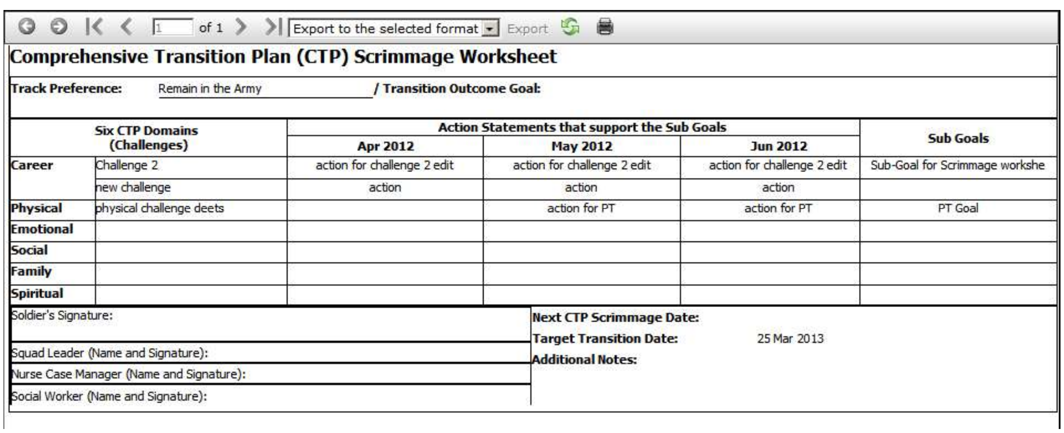
3. Review, update, and add new items to the worksheet as appropriate.
4. Print Scrimmage Worksheet if any modifications have been made.
5. Collect appropriate signatures on the scrimmage worksheet.
6. Provide a signed copy of the worksheet to the Soldier.
7. Scan and Add Attachment to the Soldier's case.

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: Remain in the Army / Transition Outcome Goal:

Six CTP Domains (Challenges)		Action Statements that support the Sub Goals: Apr 2012	May 2012	Jun 2012	Sub Goals
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:
Squad Leader (Name and Signature):
Nurse Case Manager (Name and Signature):
Social Worker (Name and Signature):

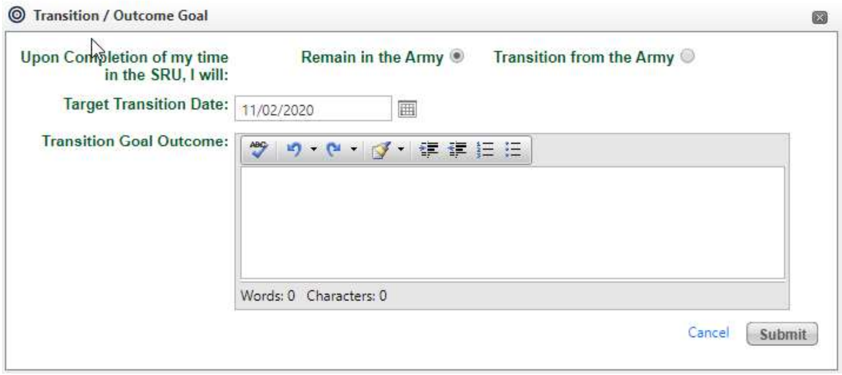
Next CTP Scrimmage Date:
Target Transition Date: 25 Mar 2013
Additional Notes:

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:

1. Click **Edit** from the Scrimmage Details section.
2. The Transition / Outcome Goal window opens.



3. Select a Career Track: Remain in the Army or Transition from the Army.
4. Select a Target Transition Date, and enter the long-term Transition Goal Outcome.
5. Click **Submit** to set the transition and outcome goals or **Cancel** to close the window without saving.

Automated Target Transition Date

The Target Transition Date is automatically set by the system when certain even triggers occur.

- In-Processing - TTD = In-processing Date + 365 days
- SRU Phase Changed to Veteran Track - TTD = SRU Phase Date + 180 days
- SRU Phase Changed to RTD Track - TTD = SRU Phase Date + 30 days

Risk Assessment

Use the Risk Assessment screen to initiate a new Risk Assessment and view completed Risk Assessment data.

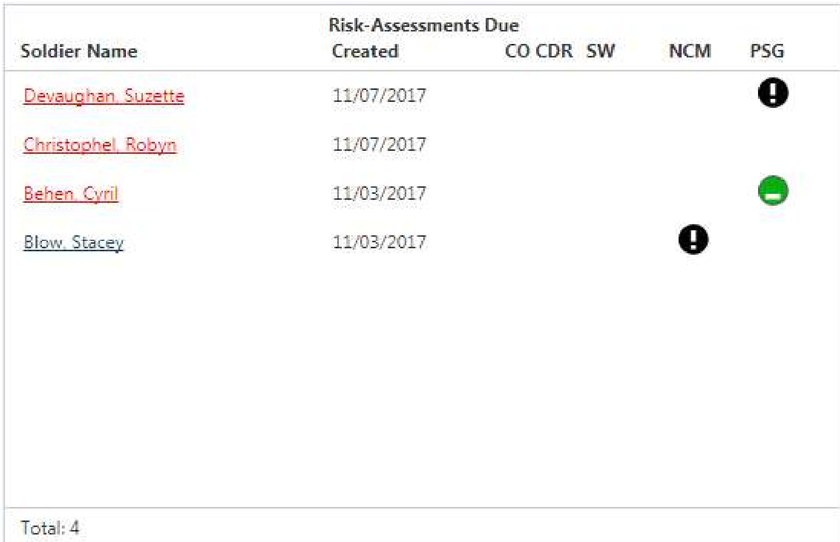
Risk Assessment Summary Items

Label	Name	Description
A	Initiate New Risk Assessment button	Click Initiate New Risk Assessment to start a new Risk Assessment **NOTE: If there is already an active Risk Assessment, initiating a new assessment will close the current active assessment.**
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

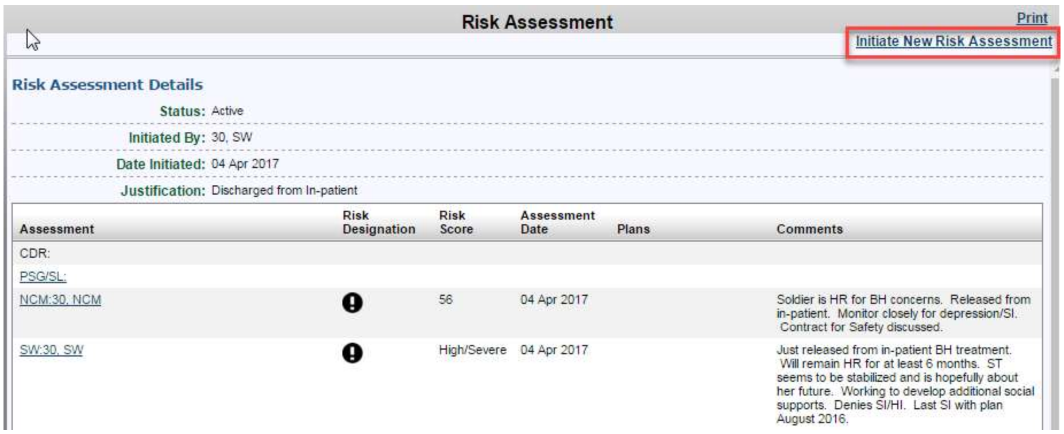
PERMISSIONS: Administrator, Program Analyst, Social Worker, Company Commander, Nurse Case Manage, Platoon Sergeant, Squad Leader

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

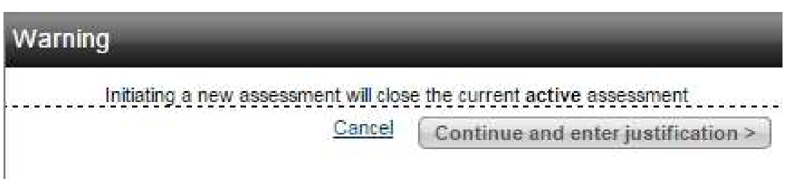
If a Risk Assessment has not been started, or a new assessment is needed, the SL, PSG, NCM, SW, Company CDR, or Program Analyst can initiate a Risk Assessment.

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**.



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.



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