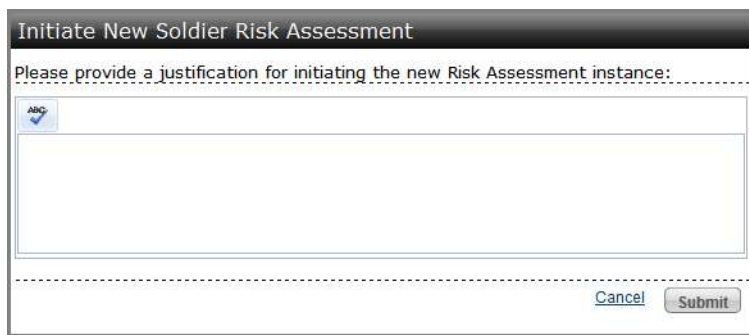




4. Enter a justification for the new Risk Assessment.
 - Periodic Risk Assessment (as determined by policy): ex. "Weekly Risk Assessment"
 - Event in the Soldier's life affecting their risk level: ex. "Soldier's brother passed away"
5. Click **Submit** to initiate the Risk Assessment, or **Cancel** to discard without changes.

NOTE: Soldiers in-processed to the SRU as "in-patient" will not have a Risk Assessment. To initiate a Risk Assessment, the Program Analyst must Update Clinical Status to "out-patient".

Cancel Risk Assessment

PERMISSIONS: CPT Management Analyst or Administrator

When a Risk Assessment is generated by mistake, it can be deleted as long as no entries are made in the assessment. If any assessor has completed their part of the assessment, the Cancel link will not be available.

To cancel an assessment:

1. From the Risk Assessment page in the Soldier's case, click "Delete Current Risk Assessment."

Risk Assessment Print

[Delete Current Risk Assessment](#) [Initiate New Risk Assessment](#)

Risk Assessment Details

Status: Active

Initiated By: 25, MA

Date Initiated: 02 Oct 2019

Justification: Weekly high risk assessment

BN CDR Approval By:

BN CDR Approval Date:

BN CDR Comments:

Assessment	Risk Designation	Risk Score	Assessment Plans	Comments
CDR: PSG/SL: NCM: SW:	No Data Here			

All Risk Assessments

2. Provide a written justification for the deletion.

Delete Soldier Risk Assessment

Please provide a justification for deleting the Risk Assessment:

Assessment initiated for wrong Soldier.

[Cancel](#) [Delete](#)

3. Click "Delete."

NOTE: This action cannot be undone.

Complete PSG/SL Risk Assessment

PERMISSIONS: Assigned PSG/SL (or other PSG/SL within the organizational structure if no PSG or SL is assigned)

To begin the Risk Assessment:

1. Click the Soldier's name on the Risk Assessment dashboard or click the PSG/SL hyperlink on the Risk Assessment Summary screen.

2. The Risk Assessment screen opens.

PSG / SLASSESSMENT

Subject ID: N201, Version 3

Date Initiated: 12 Mar 2019

Status: COMPLETE

Justification: N/A (g/g/g/g/g)

Last Assessment: 20 Jun 2017

Last Risk Designation: A

B Not Assessed: ☐

C Please assign a score for each risk factor

Section I: Yes (Y) or No (N)		Yes	No	Legal
1. Domestic violence reported last 2 months	☐	☐	☐	Y/N
2. History of Suicide/terrorism, enemy last 10 days	☐	☐	☐	No (0)
3. Designated High Risk by ASAP/USDOC	☐	☐	☐	No (0)
Section II: Age				10-19
4. Age 25 or older	☐	☐	☐	100 (0)
Section III: 0 (low) - 3 (high)		0	1	2
5. Multiple combat or imminent danger deployments	☐	☐	☐	0
6. Exposed to combat last 180 days	☐	☐	☐	0
Section IV: 0 (low) - 3 (high)		0	1	2
7. Legal Issues (History of ASAC, USMC)	☐	☐	☐	0
8. History of non-compliance with Transfer Transition program (Falls to meet with SL, CM, PDM, specialty care provider)	☐	☐	☐	0
9. Social network (self/peer/family) meeting/friends, last 60 days (friend's death)	☐	☐	☐	0
Section V: 0 (low) - 4 (high)		0	1	2
10. Financial Issues	☐	☐	☐	0
11. Alcohol or drug abuse resulting in missed appointment or duty	☐	☐	☐	0
12. Experienced two or more in-battle accidents (MIA)	☐	☐	☐	0
13. Counseled for poor performance within last 60 days	☐	☐	☐	0
Section VI: 0 (low) - 7 (high)		0	1	2
14. Physical or mental conformation 2 or more times in last 60 days	☐	☐	☐	0
Section VII: 0 (low) - 10 (high)		0	1	2
15. Exposed or displayed any acts of self-harm	☐	☐	☐	0

D Comments:

Add comments below

Enter Comments HERE

Words: 3 Characters: 21

E Risk Assessment Results

Score: 0

Designation: G

I Cancel

J Next

Risk Assessment Items

Label	Name	Description
A	Previous Risk Level	Displays the previous Risk Level determined by the NCM during the last Risk Assessment.
B	Not Assessed Check Box	Select the Not Assessed Check Box if the Self Assessment was not assessed.
C	Previous Ratings	Displays the score for each risk factor from the previous NCM risk assessment.
D	Information Icon	Point the cursor to the information icon to view details about the risk factor.
E	Yes/No Ratings	Select a radio button. Yes = 17 points, No = 0 points
F	Scored Ratings	Select a radio button matching the desired score.
G	Risk Level	The overall score will update with each factor score. • 0-6 = Low (green) • 7-10 = Guarded (amber) • 11-16 = Moderate (red) • 17+ = High (black) • Not Assessed (white)
H	Comments	Enter comments clarifying the risk assessment ratings and any other pertinent information. Limit PHI.
I	Cancel Button	Click Cancel to return to the Risk Assessment Summary without saving the Risk Assessment.
J	Next Button	Click Next to continue to the next screen.

3. Complete all drop downs and click **Next**.
4. The Risk Assessment Review screen opens.

PSG / SL Assessment	
 Your Assessment has not been submitted. Please review your assessments and click SUBMIT once complete.	
Section I: Yes (17) or No (0)	
1. Domestic violence/neglect last 3 months	No (0)
2. History of Suicidal/homicidal attempt last 30 days	No (0)
3. Designated High Risk by ASAP/SUDCC	No (0)
Section II: Age	
4. Age 25 or under	21-25 (1)
Section III: 0 (low) - 2 (high)	
5. Multiple combat or imminent danger deployments	0
6. Exposed to combat last 180 days	0
Section IV: 0 (low) - 3 (high)	
7. Legal Issues (History of AWOL, UCMJ)	1
8. History of non-compliance with Warrior Transition program (fails to meet with SL, CM, PCM, specialty care provider)	1
9. Social isolation/withdrawal (difficulty making friends, bad influences, friend's death)	0
Section V: 0 (low) - 4 (high)	
10. Financial Issues	0
11. Alcohol or drug abuse resulting in: missed appointment or duty; under influence during duty or appointment; referred to community mental health for alcohol or drugs; illegal drug use, alcohol violation	1
12. Experienced two or more at fault accidents (MVA)	0
13. Counseled for poor performance within last 90 days	0
Section VI: 0 (low) - 7 (high)	
14. Physical or verbal confrontation 2 or more times in last 90 days	0
Section VII: 0 (low) - 10 (high)	
15. Expressed or displayed any acts of self-harm	0
* Comments: No immediate concerns.	Risk Assessment Results Score: 4 Designation: 
Edit Submit	

- Click **Edit** to make any changes, or click **Submit** to complete the Risk Assessment.
- The Risk Assessment designation is added to the Risk Assessment Summary.

NOTE: Navigating to another page before the Risk Assessment summary is displayed may cause the Assessment results to be lost.

Not Assessed PSG/SL

When completing the PSG/SL Assessment, users have the option of selecting "Not Assessed".

To use this functionality:

1. Select "Not Assessed" check box
2. Add a Comment regarding the reason the Soldier is not being assessed.

PSG / SL ASSESSMENT

Initiated By: SL, Belvoir CC1
Date Initiated: 26 Aug 2024
Justification: test

Status: ACTIVE
Last Assessment: 09 Aug 2023
Last Risk Designation: ⚠️

1 Not Assessed: ☒

* Please assign a score for each risk factor

* Comments:
Add comments below

Enter a justification HERE for reason Not Assessed checkbox was selected.

Words: 11 Characters: 74

Risk Assessment Results
Score: N/A
Designation: ⚠️

[Cancel](#) [Next >](#)

3. Click Next
4. The Risk Assessment Review Screen opens.
5. Click **Edit** to make any changes, or click **Submit** to complete the Risk Assessment.
6. The Risk Assessment of "Not Assessed" is added to the Risk Assessment Summary.

Risk Assessment Details

Status: Active

Initiated By: SL, Belvoir CC1
Date Initiated: 26 Aug 2024
Justification: test

BN CDR Approval By:
BN CDR Approval Date:
BN CDR Comments:

Assessment	Risk Designation	Risk Score	Assessment Date	Plans	Comments
CDR: PSG/SL SL Belvoir CC1 NCM: SW: BHRMQ Estimated Risk		N/A	17 Sep 2024		Enter a justification HERE for reason PSG/SL Not Assessed checkbox was selected.

NCM Risk Assessment

PERMISSIONS: Assigned NCM, (or other NCM within the organizational structure if the Soldier does not have an assigned NCM)

To begin the Risk Assessment:

1. Click the Soldier's name on the Risk Assessment dashboard or click the NCM hyper-link on the Risk Assessment Summary screen.
2. The Risk Assessment screen opens.

NCM ASSESSMENT

Assessment ID: SRU-001
 Date: 20 Aug 2024
 Version: 2.0

1. Patient Information

Name: [Redacted]
 SSN: [Redacted]
 DOB: [Redacted]
 MOC: [Redacted]

2. Assessment Details

Assessment Type: [Redacted]
 Location: [Redacted]
 Date: [Redacted]
 Time: [Redacted]

3. Assessment Results

Item	Yes	No	Comments
1. Patient is conscious and oriented	☐	☐	
2. Patient is breathing and has a pulse	☐	☐	
3. Patient is breathing and has a pulse	☐	☐	
4. Patient is breathing and has a pulse	☐	☐	
5. Patient is breathing and has a pulse	☐	☐	
6. Patient is breathing and has a pulse	☐	☐	
7. Patient is breathing and has a pulse	☐	☐	
8. Patient is breathing and has a pulse	☐	☐	
9. Patient is breathing and has a pulse	☐	☐	
10. Patient is breathing and has a pulse	☐	☐	
11. Patient is breathing and has a pulse	☐	☐	
12. Patient is breathing and has a pulse	☐	☐	
13. Patient is breathing and has a pulse	☐	☐	
14. Patient is breathing and has a pulse	☐	☐	
15. Patient is breathing and has a pulse	☐	☐	
16. Patient is breathing and has a pulse	☐	☐	
17. Patient is breathing and has a pulse	☐	☐	
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95. Patient is breathing and has a pulse	☐	☐	
96. Patient is breathing and has a pulse	☐	☐	
97. Patient is breathing and has a pulse	☐	☐	
98. Patient is breathing and has a pulse	☐	☐	
99. Patient is breathing and has a pulse	☐	☐	
100. Patient is breathing and has a pulse	☐	☐	

4. Assessment Summary

Overall Status: [Redacted]
 Notes: [Redacted]

5. Assessment Results

Assessment ID: SRU-001
 Date: 20 Aug 2024
 Version: 2.0

6. Assessment Results

Assessment ID: SRU-001
 Date: 20 Aug 2024
 Version: 2.0

Risk Assessment Items

Label	Name	Description
A	Previous Risk Level	Displays the previous Risk Level determined by the NCM during the last Risk Assessment.
B	Not Assessed Check Box	Select the Not Assessed Check Box if the Self Assessment was not assessed.
C	Previous Ratings	Displays the score for each risk factor from the previous NCM risk assessment.
D	Information Icon	Point the cursor to the information icon to view details about the risk factor.
E	Yes/No Ratings	Select a radio button. Yes = 17 points, No = 0 points
F	Scored Ratings	Select a radio button matching the desired score.
G	Risk Level	The overall score will update with each factor score. • 0-6 = Low (green) • 7-10 = Guarded (amber) • 11-16 = Moderate (red) • 17+ = High (black) • Not Assessed = White
H	Comments	Enter comments clarifying the risk assessment ratings and any other pertinent information. Limit PHI.
I	Cancel Button	Click Cancel to return to the Risk Assessment Summary without saving the Risk Assessment.
J	Next Button	Click Next to continue to the next screen.

3. Complete all drop downs and click **Next**.
4. The Risk Assessment Review screen opens.

NCM Assessment

 Your Assessment has not been submitted. Please review your assessments and click SUBMIT once complete.

Section I: Yes (17) or No (0)		Score
1. Failure to progress with medical treatment plans		No (0)
2. Released from in-patient or partial stay psychiatric unit last 2 weeks		No (0)
3. Designated High Risk by ASAP/SUDCC		No (0)
4. History of suicidal/homicidal attempt last 30 days		No (0)
5. Domestic violence/neglect last 3 months		No (0)

Section II: 0 (lowest) - 3 (highest)		Score
6. Family challenges (divorce, adoption, marriage, recent birth, conflict, serious illness or death)		1
7. History of mental health problems that have warranted an admission or intensive outpatient therapy treatment		2
8. History of illegal drug use		0
9. History of ASAP failure		0
10. History of drug seeking behavior		0
11. History of domestic violence/neglect		0

Section III: 0 (lowest) - 4 (highest)		Score
12. Social isolation/withdrawal		2
13. History of suicidal/homicidal thoughts		1
14. Family/Friend history of suicide/homicide		2

Section IV: 0 (lowest) - 5 (highest)		Score
15. History of Suicidal/homicidal attempt		0

Section V: 0 (lowest) - 6 (highest)		Score
Tragic experience that the soldier could answer Yes to one or more of the following:		
16. ▪ Nightmares about event or thought about event when they did not want to ▪ Constantly on guard or startled ▪ Numb or detached from others		4

*** Comments:**

Soldier is somewhat withdrawn and isolated. Continue providing stepped up support for BH needs.

Risk Assessment Results

Score: 12
Designation: ●

[Edit](#)
[Submit](#)

5. Click **Edit** to make any changes, or click **Submit** to complete the Risk Assessment.
6. The Risk Assessment designation is added to the Risk Assessment Summary.

NOTE: Navigating to another page before the Risk Assessment summary is displayed may cause the Assessment results to be lost.

Inpatient- Not Assessed

If a Soldier is identified as inpatient in ARCS, clinical risk raters (NCM and SW) have the option of selecting "Inpatient - Not Assessed" when performing data entry in a Risk Assessment. This is meant to accommodate the following situations:

- Chain of Command generates a Risk Assessment even though a Soldier is inpatient
- A Soldier becomes inpatient after an assessment was generated

To use this functionality:

1. Check the box "Inpatient - Not Assessed"
2. Add comments.
3. Click "Next".
4. Click "Submit" on the review page.

The screenshot displays the 'NCM Assessment' form. At the top, it shows 'Initiated By: _25, NCM' and 'Status: Active'. Below this, 'Date Initiated: 28 Jun 2019' and 'Last Assessment: 13 Mar 2019' are visible. The 'Justification' field is set to 'Periodic Risk Assessment'. A red box highlights the 'Inpatient - Not Assessed' checkbox, which is checked. To the right, 'Last Risk Designation' is shown with a green circle icon. Below the justification field is a 'Comments' section with a text area and a 'Words: 0 Characters: 0' counter. On the right side, the 'Risk Assessment Results' section shows 'Score: N/A' and 'Designation: -' with a white circle icon. At the bottom right, there are 'Cancel' and 'Next >' buttons.

The risk level will reflect a white circle indicating an assessment was not performed. The system will capture the date and time of the entry.

NOTE: Risk Assessments are not required for Inpatient Soldiers because it is assumed their risk is being managed by the facility.

Not Assessed NCM

When completing the NCM Assessment, users have the option of selecting "Not Assessed".

To use this functionality:

1. Select "Not Assessed" check box
2. Add a Comment regarding the reason the Soldier is not being assessed.

3. Click Next
4. The Risk Assessment Review Screen opens.
5. Click **Edit** to make any changes, or click **Submit** to complete the Risk Assessment.
6. The Risk Assessment of "Not Assessed" is added to the Risk Assessment Summary.

Assessment	Risk Designation	Risk Score	Assessment Plans Date	Comments
CDR: PSG/SL: NCM-NCM, Belvoir 1 SW: BHRMQ Estimated Risk	N/A	N/A	17 Sep 2024	Enter a justification HERE for reason the Not Assessed Checkbox was selected.

Complete SW Risk Assessment

PERMISSIONS: Assigned SW (or other SW within the organizational structure if the Soldier does not have an assigned SW)

To begin the Risk Assessment:

1. Click the Soldier's name on the Risk Assessment dashboard or the SW hyperlink on the Risk Assessment Summary screen.
2. The Risk Assessment screen opens.

BHRMQ Start Page

1. Enter an Interview Type
2. Select one or more sources
3. Establish Consent

The screenshot displays the BHRMQ (Behavioral Health Recovery Module Questionnaire) Start Page. At the top, a progress bar shows steps from Start to F1 through F8, and finally Overall. Below this, the text 'Get Started: New Assessment' and 'Date Initiated: 31 Aug 2020' are visible.

The main section is titled 'BHRMQ Factor Groups' and states: 'This assessment will include the following Factor groups:'. It lists eight factor groups with their respective question counts:

Factor Group	Questions
F1 Behavioral / Mental Health (Self-Harm/Suicide)	9 Questions
F2 Mental Status	4 Questions
F3 Anxiety and PTSD	7 Questions
F4 Anger / Aggression Including DV	9 Questions
F5 Substance Use	6 Questions
F6 Psychological Hx / Relationships	6 Questions
F7 Environment / Support System	6 Questions
F8 Health History and TBI	7 Questions

Total: 56 questions

The 'Interview' section prompts the user to 'Select the type of interview and all applicable sources included for this assessment.' It features an 'Interview Type' dropdown menu, a 'Sources' list with checkboxes, and an 'Other Reasons' text field. A red arrow points from the 'Interview Type' dropdown to a detailed view of the dropdown options: Face-to-Face, Not Assessed, Other, and Telephone.

The 'Establish Consent' section asks: 'The Soldier (and others if necessary) have been informed of the purpose for this assessment and the limits to confidentiality.' with radio buttons for 'Yes' and 'No'.

4. Click **Next**, or use the wizard at the top of the page to move to Factor Group 1.

No Consent will force selection of "Not Assessed" as the Interview Type.

BHRMQ Complete Factor Group

1. Before completing each factor group, review the Instructions for that factor group.

BHRMQ

Start > F1 > F2 > F3 > F4 > F5 > F6 > F7 > F8 > Overall

F1: Behavioral / Mental Health (Self-Harm/Suicide) **F1 Instructions**

Input data on this factor group

F1-1 On a scale of 1-10, rate your emotion

0 1 2

F1-2 Are you having thoughts of harming yourself or others?

No Yes

F1-3 Do you have a plan to harm yourself or others?

No Yes

Instructions

Complete the Behavioral Health Risk Management Questionnaire (BHRMQ) and the Behavioral Health Intake - Psychosocial History and Assessment (BHI-PHA) with the Soldier and enter the Soldier's responses to the respective questions below.

Have the Soldier complete the **Depression Scale (PHQ-9)** AND **Safety Plan (Suicide Prevention)** if any of the following were answered:

- F1-1 was marked 5 through 10
- F1-2; F1-3; F1-4; or F1-8 were marked "Yes"
- F1-6 was marked "No"
- F1-7 was marked "Occasionally" or "Frequently"

Note on BHI-PHA

F1-1 through F1-8 are located in Section V, Behavioral/Mental Health (A-Depression & B-Self Harm)

Ok, got it

2. For each question within a factor group, select an appropriate answer.
 3. If a previous assessment exists, using "Add Previous Scores" will populate the last completed assessment results for each question.
- When adding previous scores, always carefully review each question to assess for changes.

F1: Behavioral / Mental Health (Self-Harm/Suicide) [F1 Instructions](#)

Input data on this factor group [Add Previous Scores](#)

F1-1 On a scale of 1-10, "10" having Totally Disabling emotional pain or distress and "0" have No Emotional Pain or Distress —How do you rate your emotional pain or distress?

0 1 2 3 4 5 6 7 8 9 10 Prev 2 [HINT](#)

F1-2 Are you having thoughts of harming or killing yourself?

No Yes Prev [HINT](#)

F1-9 Have you been hospitalized for mental health or substance use reasons in the PAST 30 DAYS?

No Yes Prev Yes [HINT](#)

[Get Results](#)

4. Click "Get Results" to continue.

[Review Questions](#)

Factor Group Summary Results

Review the results for accuracy, concurrence, and comment.

F1: Behavioral / Mental Health (Self-Harm/Suicide)

Weighted Results	Items	Rating
	F1-1 On a scale of 1-10, "10" having Totally Disabling emotional pain or distress and "0" have No Emotional Pain or Distress — How do you rate your emotional pain or distress?	5
	F1-2 Are you having thoughts of harming or killing yourself?	No
	F1-3 Do you have a plan to harm yourself (shoot self, overdose, cut self with knife, hang self, etc.)?	No
	F1-4 Do you have access to means to carry out that plan (knives, rope, gun, drugs/medications)?	N/A
	F1-5 Have you ever tried to harm yourself?	No
	F1-6 Are you hopeful about your future?	Yes
	F1-7 How often do you perceive you have failures in your life?	Never
	F1-8 Have you ever been diagnosed with a behavioral health condition/illness by a health care provider?	No
	F1-9 Have you been hospitalized for mental health or substance use reasons in the PAST 30 DAYS?	No

Results Guarded

Concurrence

* Do you agree with the results?

☒ Yes ☐ No

Comments

Soldier Reported she has been diagnosed with PTSD and TBI. Soldier was involved in an auto accident SEP 2019 that resulted in LOC & hospitalization for injuries. Soldier reported nightmares and increased startle response when driving. Soldier actively engaged in tx for PTSD & TBI @ DBH & TBI clinic, chart review/provider reports indicate positive progress and low risk of harm to self/others. Positive prognosis, Soldier in good spirits and expects to RTD. Reduce to guarded risk level.

[Next](#)

5. Review the [BHRMQ Weighted Results](#) and indicate concurrence with the results using "Yes" or "No".
6. If No, a justification comment is required in the text box.
7. To return to the questions, select "Review Questions".
8. Click Next or select the next factor group in the wizard bar at the top of the page.

BHRMQ Weighted Results

Weighted results are found by taking each factor group and dividing the total Liability points by the total available points for each factor group.

[Asset Scoring spreadsheet](#)

[Liability Scoring spreadsheet](#)

BHRMQ Overall

When all factor groups are completed, you will be at the Overall page.



1. Review risk levels, concurrence and comments for the current BHRMQ.

Start

F1

F2

F3

F4

F5

F6

F7

F8

Overall

Overall Summary

Factor Group summary & Recommended Tool Scores

Review summary to ensure accuracy. If you do not concur with a factor group determination, you can go back to change it. For Recommended Tools, you can review, add and edit tools for this session.

Factor Group Scores

Factor Group	First 31 Aug 2020	Previous 31 Aug 2020	Current 31 Aug 2020	Concur	Comment
F1 Behavioral / Mental Health (Self-Harm/Suicide)	!	!	!	No	Soldier Reported she has been diagnosed with PTSD and TBI. Soldier was involved in an auto accident SEP 2019 that resulted in LOC & hospitalization for injuries. Soldier reported nightmares and increased startle response when driving. Soldier actively engaged in tx for PTSD & TBI @ DBM & TBI clinic. Chart review/provider reports indicate positive progress and low risk of harm to self/others. Positive prognosis. Soldier in good spirits and expects to RTD. Reduce to guarded risk level.
F2 Mental Status	!	!	!	Yes	
F3 Anxiety and PTSD	!	!	!	No	Soldier reports periodic nightmares and anxiety since auto accident, also increased startle response. SM denied that these issues were causing significant challenges in daily life (although they did initially), and reported she is working on them with her SM provider, whom she sees twice a month. Lowered to moderate.
F4 Anger / Aggression including DV	!	!	!	No	Soldier reported she was initially angry at the person who caused the collision (and still is somewhat) as it has created significant issues with health, career, and home life due to car damage, hospitalization, rehab, & inability to participate in previously enjoyed activities. That said, Soldier reported anger has improved over time and insurance payment finally came in. Soldier in good spirits, is on track to RTD, and has strong support system. Soldier credibly denied significant issues with anger. Reduce to low.
F5 Substance Use	!	!	!	Yes	SM credibly denied issues with legal, illegal, or prescription substances.
F6 Psychological Hx / Relationships	!	!	!	No	SM reported normal marital issues with some increase in stress due to challenges related to COVID (working from home, parenting) and stated she considers her marriage solid (married 22 years). SM stated she is having challenges with her children related to homeschooling during COVID but otherwise things are normal. Chart review consistent with Soldier report. Reduce risk.
F7 Environment / Support System	!	!	!	No	Soldier reported initial stress related to whether she could RTD, and disappointment that she had to reclass from T1B, but reported her faith has enabled her to deal with challenges better and maintain a positive outlook.
F8 Health History and TBI	!	!	!	Yes	SM reported manageable pain that is monitored by her PCM. SM stated her sleep issues are due to occasional nightmares and sometimes discomfort due to pain. SM denied significant problems otherwise. SM does have TBI dx.

NOTE: All factor group comments are included in Social Worker BHRMQ exports.

- Select an Overall Risk Level based on the Recommended Risk Level (highest of all factor groups) and your specific factor group risk ratings.

Overall Score and Additional Comments

Recommended Risk Level: Moderate 

Risk modification requires non-concur in one or more factor groups.

* Overall Risk Level

☐ Low
☐ Guarded
☒ Moderate
☐ High

**"Agree" with all F1-F8 ratings
Cannot modify overall risk**

Additional Comments (visible only to designated roles)

Words: 0 Characters: 0

Soldier Behavioral Health Status

* Is the Soldier being seen currently for a Behavioral Health condition (DBH, SUDCC, FAP, off-post, any other BH services, etc.)?

☒ Yes ☐ No

Modifying the risk level requires non-concurrence with one or more factor group ratings (F1-F8). If "agree" is selected in every factor group, overall risk cannot be changed. Internal comments will be available in the Social Worker printed assessment (for transfer to the EHR), but will not be visible to most users.

3. Indicate or verify the Soldier Behavioral Health Status.
4. Select any pre-designated risk mitigation measures.
5. Click "Add to Plan" to move the measures to the comment box.

Overall Comments

Provide any additional comments and mitigation measures going forward

Mitigation Measures List

☒ BH Safety Plan
☐ CDR notified High Risk
☐ Emergency services info
☐ Escort to appointments
☐ Family Advocacy
☐ Include Family/Significant Other
☐ Increased C2 contact
☐ Interdisciplinary team meeting
☐ Marital/Family Counseling
☐ No Alcohol Order
☐ PCM for evaluation

Add to Plan ->

* Overall comments and Risk Mitigation Recommendations

Words: 0 Characters: 0

Next

6. In the text box, change the XXXX to the appropriate date or clarification for that mitigation measure.

Overall Comments

Provide any additional comments and mitigation measures going forward

Mitigation Measures List Add to Plan ->

- ☐ BH Safety Plan
- ☐ CDR notified High Risk
- ☐ Emergency services info
- ☐ Escort to appointments
- ☐ Family Advocacy
- ☐ Include Family/Significant Other
- ☐ Increased C2 contact
- ☐ Interdisciplinary team meeting
- ☐ Marital/Family Counseling
- ☐ No Alcohol Order
- ☐ PCM for evaluation

*** Overall comments and Risk Mitigation Recommendations**

BH Safety Plan completed/updated/reviewed on this date: 0000

Words: 8 Characters: 60

Next

7. Add any other mitigation measures taken by the Social Worker or recommended to the Commander in the text box.
8. Add any other comments that will assist the Commander with selecting the most appropriate risk designation.
9. When finished, click Next.
10. Review the assessment and click "Submit" to complete the BHRMQ.

Not Assessed

When completing the SW BHRMQ, users have the option of selecting " Not Assessed" as the Interview Type on the first page of the assessment. This is meant to accommodate the following situations:

- Chain of Command generates a Risk Assessment even though a Soldier is inpatient
- A Soldier becomes inpatient after an assessment was generated
- A Soldier does not consent to completion of the Risk Assessment

To use this functionality:

1. Select "Not Assessed" as the Interview Type
2. A pop-up window appears.

BHRMQ: Soldier Not Assessed

Provide comments about why Soldier is not assessed:

This Soldier is currently inpatient and not available for risk assessment.

Words: 11 Characters: 74

Cancel Done

1. Add comments regarding the reason the Soldier is not being assessed.
2. Click "Done".
3. Select the Soldier Behavioral Health Status on the "Overall" page.

Overall Summary

Factor Group summary & Recommended Tool Scores

FB Health History and TBI

Overall Score and Internal Comments

Recommended Risk Level:
* Overall Risk Level

☒ Not Assessed
☐ Low
☐ Guarded
☐ Moderate
☐ High

Internal Comments (visible only to designated roles)
Justification required when modifying the overall risk level

Words: 0 Characters: 0

Soldier Behavioral Health Status
* Is the Soldier being seen currently for a Behavioral Health condition (DBH, SUDCC, FAP, off-post, any other BHI services, etc.)?

☒ Yes ☐ No

Overall Comments
Provide any additional comments and mitigation measures going forward

Mitigation Measures List Add to Plan ->

- ☐ BHI Safety Plan
- ☐ CDR notified High Risk
- ☐ Emergency services info
- ☐ Escort to appointments
- ☐ Family Advocacy
- ☐ Include Family/Significant Other
- ☐ Increased C2 contact
- ☐ Interdisciplinary team meeting
- ☐ Marital/Family Counseling
- ☐ No Alcohol Order
- ☐ PCM for evaluation

Overall comments and Risk Mitigation Recommendations

This Soldier is currently inpatient and not available for risk assessment.

Words: 11 Characters: 74

Next

1. Click "Submit" on the review page.

The risk level will reflect a white circle indicating an assessment was not performed. The system will capture the date and time of the entry.

Social Worker Screeners (fillable)

[AUDIT](#)

[Printable BHRM](#)

[CRPLAN](#)

[CSSRS](#)

[GAD-7](#)

[PHQ-9](#)

[PCL5](#)

Scoring Guides

[CSSRS Scoring Guide](#)

[GAD - 7 Scoring Guide](#)

[PHQ-9 Scoring Guide](#)

[PCL Scoring Guide](#)

Exporting Social Worker Screeners from ARCS

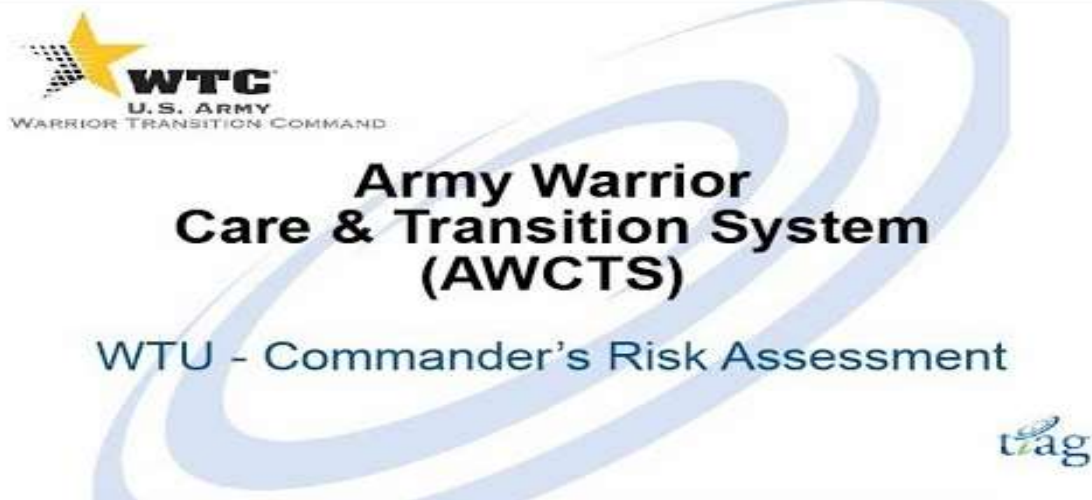
Exporting the fillable documents can be done in the Soldier's Risk Assessment Tab.

The screenshot displays the ARCS Risk Assessment interface. On the left, a sidebar contains a navigation menu with the following items: Case Summary, Soldier Information, Transition Tracker, Assignment, Soldier / Relationship Information, Goal Setting / Scrimmage, Risk Assessment (highlighted with a red box), and Self-Assessment. The main content area is titled 'RISK ASSESSMENT' and features a table of assessment details. The table includes fields for Status (Active), Initiated By (Social, Worker 10), Date Initiated (10 Nov 2022), and Justification. A dropdown menu is open next to the 'Initiate New Risk Assessment' link, showing a list of screeners: AUDIT, BHRMQ Fillable, CRPLAN, CSSRS, GAD-7, PCL5, and PHQ-9. The dropdown menu is also highlighted with a red box.

Risk Assessment Details	
Status:	Active
Initiated By:	Social, Worker 10
Date Initiated:	10 Nov 2022
Justification:	

Complete CDR Risk Assessment

PERMISSIONS: Assigned Company Commander (other Company Commander if the Soldier does not have an assigned Company)



NOTE: Completing and Submitting the Commander Risk Assessment will label the assessment 'Complete'. The NCM, SW, and SL/PSG have up to 7 days to complete their assessment if a new assessment is not initiated.

Once all other Risk Assessments have been completed, the CO CDR determines the overall risk assessment and any corresponding management or mitigating actions.

1. To begin the CDR Risk Assessment, select the Soldier's name link on the Home page dashboard, or click the **CDR** hyperlink on the Risk Assessment Summary screen.

Soldier Name	Risk-Assessments Due				
	Created	CO CDR	SW	NCM	PSG
Cassa, Hilario	05/01/2018		!	!	!

- OR -

Risk Assessment					
Print Initiate New Risk Assessment					
Risk Assessment Details					
Status: Active					
Initiated By: Real, 000 AdminReal			BN CDR Approval By:		
Date Initiated: 17 Feb 2017			BN CDR Approval Date:		
Justification: Soldier In-Processed on 2/17/2017 11:48:08 AM					
Assessment	Risk Designation	Risk Score	Assessment Date	Plans	Comments
CDR:					
PSG/SL 25 SL		4	02 May 2017		No issues.
NCM Nurse Case Manager 10		9	02 May 2017		Some social isolation. ST adapting to WTU.
SW Social Worker Social Worker		Moderate-Low/Guarded	02 May 2017		Expresses some social issues; though she is upbeat and hopeful for the future. Reports no SI/HI.

2. The Commander Risk Assessment Summary screen opens.

Commander Risk Assessment Summary

Print

Please review the NCM, PSG/SL and SW assessment to determine the overall risk level of the Soldier and corresponding management/mitigating actions.

Assessment	Risk Score	Risk Designation	Assessment By	Assessment Date	Comments
PSG/SL Assessment	4		_25, SL	02 May 2017	No issues.
NCM Assessment	9		Nurse Case, Manager 10	02 May 2017	Some social isolation. ST adapting to WTU.
SW Assessment			Social Worker, Social Worker	02 May 2017	Expresses some social issues, though she is upbeat and hopeful for the future. Reports no SI/HI.

Commander's Assessment

* Overall Risk Designation: Moderate-Low

* Risk Mitigation Plan Check

all actions to be part of the plan:

C2 contact to 2 times a day / 7 days per week

Medication reconciliation at least weekly and each time there is a change in medication regimen

Refer to PCM for Sole Provider Program and restrict refill amounts of medication to 7 days or less

Contract for safety

Roommate / NMA / family member

Issue No Alcohol Order

Require Battle Buddy to travel off post (sign in/out with SDNCO)

Refer to chaplain

Initiate safety counseling

Refer to Behavioral Health for evaluation and follow-up

Refer to ER for Suicidal Ideation or Homicidal Ideation

Provide 1:1 escort

Increase CM Contact

NMA / family escort

Refer to Family advocacy / marital counseling

Move on post/move into Barracks / Return to WTU from CCU

Initiate Multidisciplinary meeting with Soldier

Include Soldier's Family / Significant Other in plan

Refer to PCM for evaluation

Refer to ASAP

Additional Plan Actions:

ST assigned roommate. Encourage to participate in social functions as much as possible. Contact with SL at least once daily at formation.

Cancel

Submit

- Review the NCM, SL/PSG, and SW assessments.
- Select the Overall Risk Designation (review current policy for guidance on overall risk level)
- Select Risk Mitigation / Management items to add to the plan. See AR 40-58 and [US Army Soldier Leader Risk Reduction Tool](#) for guidance.

6. To add additional plan actions, check the box and enter other mitigation measures in the free type field. (optional)
7. Add Comments, if desired. Comments are not included in the mitigation plan email to the Soldier's care team.

NOTE: Mitigation plans for Soldiers designated as High Risk automatically include the first 10 mitigation measures. All other standard mitigation measures are selectable as appropriate to the situation.

4. When finished, click **Next** to continue.
5. The Risk Assessment Review screen opens.

The screenshot shows the 'Commander Risk Assessment Summary' screen. At the top, it says 'Please review your assessments and submit once complete.' Below this, the 'Overall Risk Designation' is 'High/Severe' with a red icon. The 'Risk Mitigation Plan' section lists 10 measures: C2 contact to 2 times a day / 7 days per week, Medication reconciliation at least weekly and each time there is a change in medication regiment, Refer to PCM for Sole Provider Program and Restrict refill amounts of medication to 7 days or less, Contract for safety, Roommate / NMA / family member, Issue No Alcohol Order, Require Battle Buddy to travel off post/sign in/out with SDNCO, Refer to Chaplain, Initiate safety counseling, Refer to Behavioral Health for evaluation and follow-up, and Initiate Multidisciplinary meeting with Soldier. Below this, there are two sections: 'Additional Plan Actions' with a sub-section 'Commander actions' containing the text 'No driving order and needs to meet with CDR for counseling regarding this recent incident.', and 'Comments' with a sub-section 'Commander comments' containing the text 'Soldier is struggling at this time. Command is considering administrative action, but this is pending civil/criminal action from local law enforcement. BC is aware of this incident and Soldier's high risk status.'

6. Click **Submit** to complete the risk assessment.
7. Soldiers assessed as High Risk will be routed to the Battalion Commander for mitigation plan approval.

NOTE: The Company level Program Analyst and HR Specialist as well as the assigned SL/PSG, NCM, CO CDR, RCC and SW will receive email notifications outlining the risk designation and mitigation plan.

View Mitigation Plan

To view the Mitigation Plan once all risk assessments have been completed, click the **View Mitigation Plan** hyperlink.

Assessment	Risk Designation	Risk Score	Assessment Date	Plans	Comments
CDR:SRU, CDR			16 Feb 2021	View Mitigation Plan >	Moderate risk. Increased C2 contact to improve Soldier's engagement at the SRU. Encourage Soldier to get involved in activities as she is able.
PSG/SL:PSG, Belvoir HQ		10	16 Feb 2021		Tends to self-isolate. No administrative problems with Soldier.
NCM:NCM, Belvoir 1		4	16 Feb 2021		Soldier is making progress medically. No reports of SI/Hi. Main concern is lack of social engagement. Soldier reports being isolated.
SW:Social, Worker 10		Moderate	15 Dec 2020		Soldier is moderate risk due to BH history. Struggling with medical condition - Referring to BH provider 16 FEB 2021. BH Safety Plan completed/updated/reviewed on this date:16FEB2021 Soldier educated about local on-post/off post emergency services and

The Commander Risk Assessment Summary (Read Only) will open. Click **Close** to exit.

Approve High Risk Mitigation Plan

PERMISSIONS: Battalion Commander

To approve and/or modify a high risk mitigation plan:

1. Select a Soldier's name from the Battalion Commander's Risk Assessment Dashboard.

Risk Assessments					
Soldier	CO CDR Date	CO CDR	SW	NCM	PSG/SL
Benitez, Alyssa	08 May 2017				
Beck, Kayla	08 May 2017				

NOTE: The dashboard will display the most recent High Risk Assessment completed by the Company Commander. Once the plan is approved, the Soldier's name will drop off of the dashboard.

2. Review risk level information and comments.

Battalion Commander Mitigation Plan Review						Print
Please review the NCM, PSG/SL and SW assessment to determine the overall risk level of the Soldier and corresponding management/mitigating actions						
Assessment	Score	Designation	By	Date	Comments	
PSG/SL Assessment	41	!	WTU, SquadLeader1	02 May 2018	Soldier recently had a DUI/car accident. Facing potential legal issues. Soldier is HIGH RISK.	
NCM Assessment	31	!	NCM, _30	02 May 2018	Recent driving incident. Soldier is progressing fine with physical treatment, but has setbacks with ETOH. Mandated ASAP/SUDCC program.	
SW Assessment		!	WTU, SW1	02 May 2018	Struggling with alcohol abuse issues. Referred to SUDCC program. Contract for safety. Will continue to meet with Soldier weekly for re-assessments.	
Company Commander's Assessment						High

- Review selected mitigation measures and Additional Plan Actions indicated by the Company Commander
- If needed, make changes to the mitigation plan (see below).

*** Risk Mitigation Plan**

Check required plan actions:

- ☒ C2 contact to 2 times a day / 7 days per week
- ☒ Medication reconciliation at least weekly and each time there is a change in medication regimen
- ☒ Refer to PCM for Sole Provider Program and restrict refill amounts of medication to 7 days or less
- ☒ Contract for safety
- ☒ Roommate / NMA / family member
- ☒ Issue No Alcohol Order
- ☒ Require Battle Buddy to travel off post (sign in/out with SDNCO)
- ☒ Refer to chaplain
- ☒ Initiate safety counseling
- ☒ Refer to Behavioral Health for evaluation and follow-up.
- ☐ Refer to ER for Suicidal Ideation or Homicidal Ideation
- ☐ Provide 1:1 escort
- ☐ Increase CM Contact
- ☐ NMA / family escort
- ☐ Refer to Family advocacy / marital counseling
- ☐ Move on post/move into Barracks / Return to WTU from CCU
- ☒ Initiate Multidisciplinary meeting with Soldier
- ☐ Include Soldier's Family / Significant Other in plan
- ☐ Refer to PCM for evaluation
- ☐ Refer to ASAP

Additional Plan Actions (optional)

☒ Accept Commander's Additional Plan Actions

Commander's Additional Plan Actions: (read-only)

No driving order and needs to meet with CDR for counseling regarding this recent incident.

☐ Add Additional Plan Actions

Battalion Commander's Additional Plan Actions:

	Description	Action
A	Required Mitigation Measures	Automatically selected mitigation measures for high risk Soldiers (cannot be modified).
B	Optional Mitigation Measures	Manually selected or deselected mitigation measures to include in the plan.
C	Commander Additional Plan Actions	Deselect the check box to reject these additional actions. (Not displayed if CDR does not add additional plan actions)
D	Battalion Commander Additional Plan Actions	Check the box to activate the text editor.

5. Add Comments if desired. (Company Commander's comments are read-only)

Comments (optional)

Commander's Comments: (read-only)

Soldier is struggling at this time. Command is considering administrative action, but this is pending civil/criminal action from local law enforcement. BC is aware of this incident and Soldier's high risk status.

Battalion Commander's Comments:

Words: 0 Characters: 0

6. Click **Next**.
7. Review the mitigation plan.

Commander Risk Assessment Summary Print

Please review your assessments and submit once complete.

Overall Risk Designation: 1 High/Severe

Risk Mitigation Plan:

- C2 contact to 2 times a day / 7 days per week
- Medication reconciliation at least weekly and each time there is a change in medication regimen
- Refer to PDM for Sole Provider Program and Restrict refill amounts of medication to 7 days or less
- Contract for safety
- Roommate / NMA / family member
- Issue No Alcohol Order
- Require Battle Buddy to travel off post/sign in/out with SDNCO
- Refer to Chaplain
- Initiate safety counseling
- Refer to Behavioral Health for evaluation and follow up
- Initiate Multidisciplinary meeting with Soldier

Additional Plan Actions:

Commander actions:
No driving order and needs to meet with CDR for counseling regarding this recent incident.

Comments:

Battalion Commander comments:
Command is keeping close watch over this Soldier.

Commander comments:
Soldier is struggling at this time. Command is considering administrative action, but this is pending civil/criminal action from local law enforcement. BC is aware of this incident and Soldier's high risk status.

Comments not included in mitigation plan email

8. Click **Submit** again to save the plan, or **Edit** to return to the review page for additional changes.
9. If any changes have been made to the mitigation plan or additional plan actions, an email will be sent to the Soldier's care team with the updated mitigation plan.

NOTE: Adding Comments will not cause additional emails to be sent to the care team. Only changes to the mitigation plan generate an updated email.

Self-Assessment

NOTE: For information on completing a Self-Assessment in the Soldier's Module, see Section [Complete Self-Assessment](#). In order to complete a self- assessment, a Soldier must have an active case in ARCS SRU.

Use the Self-Assessment screen to view and validate Soldier Self-Assessments, as well as update the frequency and availability of the assessments.

The screenshot shows the 'Self-Assessment' interface. At the top right, there is a 'Print' button (callout B) and a 'Frequency: Weekly + Available' dropdown (callout A). Below this is a pagination bar showing 'Page Size: 25', 'Page: 1 of 1', and 'Displaying Items 1 to 7 of 7'. The main table has columns: Issued, Soldier Completed, Assisted by, NCM Validation, PSG/SL Validation, and Status. The first row shows '29 Jul 2017' in the Issued column, a red circle with 'C' over the '31 Jul 2017' hyperlink in the Soldier Completed column, 'Self' in Assisted by, '17 Aug 2017' in NCM Validation, a red circle with 'D' over the 'Validate' hyperlink in the PSG/SL Validation column, and 'Pending Validation' in Status. The second row shows '28 Jul 2017' in Issued, '31 Jul 2017' in Soldier Completed, 'Self' in Assisted by, '31 Jul 2017' in NCM Validation, '31 Jul 2017' in PSG/SL Validation, and 'Complete' in Status.

Self-Assessment Screen Items

Label	Name	Description
A	Frequency button	Click the Frequency button to update the frequency and availability of the self-assessments
B	Print button	Click Print to print the Self-Assessment screen
C	Soldier Completed hyperlink	Click the hyperlink to view a read-only summary of the Self-Assessment.
D	Validate hyperlink	Click Validate to validate the Soldier's Self-Assessment

Self-Assessment Rating Scale

Green: Indicates that a Soldier feels that he has everything in place related to the specified field and does not believe he needs additional assistance.

Amber: Indicates the Soldier may need assistance or believes that there are obstacles that may limit his ability to get everything in place for that field.

Red: Indicates the Soldier is having significant issues and needs assistance.

17 Self-Assessment statements answer choices.

- Choice A = Green
- Choice B = Amber
- Choice C = Red

1. Work Plan

- My work plan supports my transition goals.
- My work plan somewhat supports my transition goals.

- c. My work plan does not support my transition goals.
- 2. Education
 - a. My education plan supports my goals.
 - b. My education plan somewhat supports my goals.
 - c. My education plan does not support my goals
- 3. Employment
 - a. I have an employment/career plan when I transition.
 - b. I have an employment/career plan but have some issues.
 - c. I do not have an employment/career plan.
- 4. Activities of Daily Living (For example: eating, bathing dressing, toileting, and meal preparation)
 - a. I am able to take care of myself without any help.
 - b. I need a little help taking care of myself.
 - c. I need a lot of help taking care of myself.
- 5. Health Care
 - a. My medical care needs are being met with no issues.
 - b. My medical care needs are being met with some issues.
 - c. My medical care needs are not being met.
- 6. Medication
 - a. My medications are working for me.
 - b. Some of my medications are working for me. (Specify those that are not working)
 - c. My medications are not working for me. (Specify those that are not working)
- 7. Pain
 - a. I have no pain, or my pain is currently managed
 - b. I have some pain and I need help managing it.
 - c. I have pain that is unmanageable.
- 8. Weigh Control
 - a. I meet the Service specific Height/Weight Standard.
 - b. I do not meet the weight standard, but I am on a program and making progress.
 - c. I do not meet the weight standard, and I am on a program and NOT making progress.

9. Physical Fitness

- a. I am able to pass the APFT (primary or alternate events) and I am participating in an adaptive PT program, or I have a permanent profile that exempts me from taking the APFT.
- b. I am unable to pass the APFT (primary or alternate events), but I am participating in an adaptive PT program.
- c. I am not participating in an adaptive PT program (regardless of my ability to pass the APFT).

10. Behavioral Health

- a. All of my behavioral health needs are being met with no issues.
- b. Some of my behavioral health issues are being met, with some issues.
- c. My behavioral health needs are not being met.

11. Well-Being

- a. I am at peace with myself and hopeful about my future.
- b. Sometimes I struggle to find peace and somewhat concerned about my future.
- c. I often struggle to find peace and I am very concerned about my future.

12. Social – Overall

- a. I have a dependable social support system.
- b. I have some social support system but it is not adequate.
- c. I have no social support system.

13. Family – Overall

- a. My family is well.
- b. My family is well but there are some issues.
- c. My family is not well.

14. Financial

- a. I have enough money to take care of myself and my family.
- b. I struggle to have enough money to take care of myself and my family.
- c. I do not have enough money to take care of myself and my family.

15. Housing

- a. My housing satisfactorily meets my needs, very satisfied.
- b. My housing meets my needs, but with some issues.
- c. My housing does not meet my needs.

16. Administrative Support – Overall

- a. I receive adequate and timely administrative support to complete my transition.
- b. I receive administrative support to complete my transition, but there are some issues.
- c. I am not receiving adequate administrative support to complete my transition.

17. Transportation

- a. I have access to dependable transportation.
- b. I have occasional transportation problems.
- c. I have frequent problems meeting my transportation needs.

Self-Assessment Validation Overview

Once a Soldier completes a Self-assessment, it must be validated.

- The Nurse Case Manager is responsible for clinical items: [Validate Clinical Self-Assessment](#)
- The SL/PSG is responsible for non-clinical items: [Validate Non-Clinical Self-Assessment](#)

Non-Clinical Self-Assessment Validation

Work Plan ☒ Education ☒ Employment ☒ Weight Control ☒ Fitness ☒ Well Being ☒ Social ☒ Family ☒

Financial ☒ Housing ☒ Administrative Support ☒ Transportation ☒ Review ☒

Soldier Participation: Face to Face ☒ Created Date: 28 Jul 2017 Assisted By: Self Completed Date: 31 Jul 2017

Career - Work Plan

Soldier Comments: SFL-TAP not yet attended. No workshops attended. No Resumes built.

Validator Comments: Concur with Soldier

Connected Plan

Description: CER
Source: Self-Assessment
Category: Career - Work Plan
Role: TRAN_COORD
Facilitator: CER_TC, CER_TC
Target Date: 8/25/2017

Details: Soldier needs to create a CER work plan

Tasks Log

+ Add new record Save changes Cancel changes

Entry

still needs to develop work plan.

needs help with education options.

Soldier is interested in attending TAP clas ASAP and needs help with his resume.

Connected to SA 7/14/2017 category Employment

Self-Assessment Screen Items

Label	Name	Description
A	Self-assessment Category Tabs	Each tab represents a single category from the Soldier's Self-assessment.
B	Soldier Participation in Validation	Select an option to reflect the Soldier's participation in the validation: Face to Face, Phone, or Independent Review.
C	Soldier Assessment	• Green: Indicates that a Soldier feels that he has everything in place related to the specified field and does not believe he needs additional assistance. • Amber: Indicates the Soldier may need assistance or believes that there are obstacles that may limit his ability to get everything in place for that field. • Red: Indicates the Soldier is having significant issues and needs assistance. See Self-Assessment Rating Scale
D	Soldier Priority	Soldier selected priority: Low, Medium, or High. <u>NOTE: A green assessment defaults to Low priority.</u>
E	Soldier Comments	Soldier comments are required for Amber and Red ratings and optional for Green ratings.
F	Concur with Self-Assessment	Check the box to indicate agreement with the Soldier's Self-assessment. <u>NOTE: If the Concur box is not checked, the Comments field is required.</u>
G	Validator Comments	Enter additional comments - required for Non-Concur categories and option otherwise.

Label	Name	Description
H	Active Action Plans	All In-Progress Action Plans associated with the Soldier's case that are not connected to the current category.
I	Connected Action Plans	All Action Plans connected to the current category.
J	NEW Action Plan link	Click NEW to create a new Action Plan associated with the current category.
K	Action Plan Details	Details for the currently highlighted Action Plan (from the Active or Connected boxes).
L	View Plan link	Select View Plan to open the full Action Plan in a new window.
M	Review Tab	Self-assessment validation summary. The submit button is on the review tab.

NOTE: Once the NCM and SL/PSG both validate the Soldier's Self-Assessment, the status is changed to "Complete."

Self-Assessments Dashboard

The Self-Assessments Dashboard is available for Nurse Case Managers, Platoon Sergeants, and Squad Leaders. It displays all **Active** and **Pending Validation** self-assessments.

Self-Assessments Due		
Soldier	Status	Due
Chipley, John	Pending validation	02 Feb 2023
Cannon, Clayton	Active	01 Feb 2023
Brzostowski, Vivian	Pending NCM	31 Jan 2023
Hindley, Barbara	Pending PSG/SL	28 Jan 2023
Zimmer, Sherry	Active	28 Jan 2023
Dagenais, Elmo	Pending validation	Tomorrow
Bellerdine, Lyndon	Active	Tomorrow

Status

- Active - The Soldier has not completed the self-assessment. Click the Active hyperlink to view the Soldier's Contact Information page.
- Pending Validation - Clicking the Soldier's name hyperlink will open the self-assessment Validation screen. Both the NCM and PSG/SL are required to take action.
- Pending PSG/SL Validation or Pending NCM Validation - No action is required. The User has completed their portion of the validation, but the other validator has not.

Due

Self-assessments remain open for a total of 7 days. Soldiers must complete their portion followed by Nurse Case Manager and SL/PSG validation. Dates in the dashboard will display "Today," "Tomorrow," or the actual date. Validations must be performed by the due date, or the self-assessment is considered Incomplete.

Begin Self-Assessment Validation

There are several methods to access the Self-assessment Validation:

- Link from the [Self-Assessments Dashboard](#)
- Link from System [Notifications](#)
- From the [Self-Assessments Tab](#) on the Assessments Screen
- Directly from the [Self-Assessment](#) section of the Soldier's Case

Validate Clinical Self-Assessment

PERMISSIONS: Assigned Nurse Case Manager

NOTE: Internet Explorer is the only supported browser for self-assessment validation.

The assigned Nurse Case Manager validates the 5 clinical categories from the Soldier's self-assessment. For information on how the Soldier rates each category, see [Self-Assessment Rating Scale](#).

- Activities of Daily Living
- Health Care
- Medication
- Pain
- Behavioral Health

1. [Begin Self-Assessment Validation](#)
2. The validation screen appears.

3. Select Soldier Participation from the drop down (Face to Face, Telephone, Independent Review)

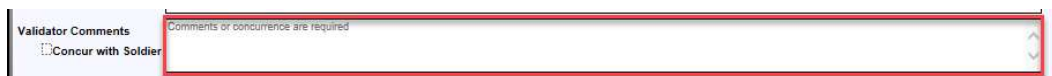
4. Review the Soldier's assessment rating, priority, and comments.



5. Check the Concur check box to agree with the Soldier's self-assessment, or leave it blank to indicate non-concurrence.



6. Add Comments. Comments are required if the validator does not agree with the Soldier's self-assessment. They are optional if the concur box is checked.



7. For Amber or Red ratings, an Action Plan must be created or updated using one of these methods:
 - [Validation - Add New Action Plan](#)
 - [Validation - Connect Existing Action Plan](#)
 - [Validation - Update Action Plan](#)
8. Select the another tab to move to another category. A green check  will appear in the tab header if the required information is complete. Moving to a new tab automatically saves concurrence and validator comments.

Clinical Self-Assessment Validation

Activities of Daily Living Health Care Medication Pain Behavioral Health Review

Soldier Participation: Face to Face Created Date: 26 Jul 2017 Assisted By: Self Completed Date: 31 Jul 2017

Physical - Health Care

Soldier Comments: Have several medical issues that require follow-up/further diagnosis

Assessment: Priority HIGH

Validator Comments: pending referrals to Ortho and pain management

☒ Concur with Soldier

9. Continue validating until all tabs contain the green check.

Clinical Self-Assessment Validation

Activities of Daily Living Health Care Medication Pain Behavioral Health Review

10. Select the **Review** tab and review ratings and comments.

Clinical Self-Assessment Validation

Activities of Daily Living Health Care Medication Pain Behavioral Health **Review**

Soldier Participation: Face to Face Created Date: 03 Feb 2017 Assisted By: Cadre Completed Date: 03 Feb 2017

Review [Submit](#)

Category	Assessment	Priority	Soldier Comments	Concur	Action Required	Validator Comments
Work Plan		High	My work plan needs some adjustment. This internship is not what I thought it would be.	Yes	Yes	
Education		Low		Yes	No	
Employment		High	Still haven't landed a job for after my transition. Starting to get stressed out.	Yes	Yes	
Activities of Daily Living		Medium	Still having trouble with tasks like showering and cooking due to limited shoulder mobility.	Yes	Yes	Soldier continues to work with OT to increase range of motion. Reports regular use of home exercises as directed.

11. To submit, click the **Submit** link on the Review page. If there are any incomplete areas, a warning message will appear. Correct the deficiencies and submit again.

Emotional - Behavioral Health...[EMO_HEALTH] validator comments are required because validator does not concur with soldier

12. The Self-assessment validation is complete when the validator is returned to their Home page.

Validate Non-Clinical Self-Assessment

PERMISSIONS: Assigned Squad Leader or Platoon Sergeant

NOTE: Internet Explorer is the only supported browser for Self-assessment validation.

The Squad Leader or Platoon Sergeant assigned to a Soldier validates the 12 non-clinical categories from the Soldier's Self-assessment. For information on how the Soldier rates each category, see [Self-Assessment Rating Scale](#).

- Work Plan
- Education
- Employment
- Weight Control
- Physical Fitness
- Well Being
- Social
- Family
- Financial
- Housing
- Administrative Support
- Transportation

1. [Begin Self-Assessment Validation](#)
2. The validation screen appears.

Non-Clinical Self-Assessment Validation

Work Plan ☒ Education ☒ Employment ☒ Weight Control ☒ Fitness ☒ Well Being ☒ Social ☒ Family ☒ Financial ☒ Housing ☒

Administrative Support ☒ Transportation ☒ Review

Soldier Participation: Face to Face Created Date: 28 Jul 2017 Assisted By: Self Completed Date: 31 Jul 2017

Career - Work Plan

Soldier Comments

Assessment ☒ SFL-TAP not yet attended. No workshops attended. No Resumes built

Priority HIGH

Validator Comments

Comments or concurrence are required

☐ Concur with Soldier

Action Plans

Active

Pain Management

Health Care

Connected Plan

Description: CER

Source: Self-Assessment Role: TRAN_COORD

Category: Career - Work Plan Facilitator: CER_TC, CER_TC

Target Date: 8/25/2017

Details:

Soldier needs to create a CER work plan

Tasks

Log

+ Add new record ✓ Save changes ⌂ Cancel changes

Entry

Connected to SA 7/14/2017 category Employment

Connected to SA 7/14/2017 category Education

Created for SA 7/14/2017 category Work Plan

Soldier needs to create a CER work plan - Created by _25, SL on 27 Jul 2017 10:42.

3. Select **Soldier Participation** from the drop down (Face to Face, Phone, Independent Review)

Work Plan ☒ Education ☒ Employment ☒

Administrative Support ☒ Transportation ☒

Soldier Participation: Phone

4. Review the Soldier's assessment rating, priority, and comments.
5. Check the Concur check box to agree with the Soldier's self-assessment, or leave it blank to indicate non-concurrence.

Validator Comments

☒ Concur with Soldier

Comments required if Validator does not concur with Soldier

6. Add Comments. Comments are required if the validator does not agree with the Soldier's self-assessment. They are optional if the concur box is checked.

Validator Comments
☐ Concur with Soldier
Comments required if Validator does not concur with Soldier

Soldier has complained about current Internship experience. He will seek guidance from the TC regarding trying to get a new Internship for his work plan.

Action Plan

7. For Amber or Red ratings, an Action Plan must be created or updated using one of these methods:
 - [Validation - Add New Action Plan](#)
 - [Validation - Connect Existing Action Plan](#)
 - [Validation - Update Action Plan](#)
8. Select the another tab to move to another category. A green check  will appear in the tab header if the required information is complete. Moving to a new tab automatically saves concurrence and validator comments.
9. Continue validating until all tabs contain the green check .

Non-Clinical Self-Assessment Validation

Work Plan   Education   Employment   Weight Control  Fitness   Well Being  Social  Family  Financial 

Housing  Administrative Support   Transportation   Review

10. Select the **Review** Tab and review ratings and comments.

Non-Clinical Self-Assessment Validation

Work Plan   Education   Employment   Weight Control  Fitness   Well Being  Social  Family  Financial 

Housing  Administrative Support   Transportation   **Review**

Soldier Participation: Face to Face  Created Date: 28 Jul 2017 Assisted By: Self Completed Date: 31 Jul 2017

Review 

Category	Assessment	Priority	Soldier Comments	Concur	Action Required	Validator Comments
Work Plan		High	SPL-TAP not yet attended. No workshops attended. No Resumes built	Yes	Yes	
Education		High	I am unaware of what educational certifications or further education is required at this point	Yes	Yes	

11. To submit, click the **Submit** link on the Review page. If there are any incomplete areas, a warning message will appear. Correct the problems and submit again.

Family - Financial...[FAMILY_FINANCIAL] validator comments are required because validator does not concur with soldier

Admin/Log - Transportation...[ADMIN_TRANSPORT] validator comments are required because validator does not concur with soldier

12. The Self-assessment validation is complete when the validator is returned to their Home page.

Validation - Add New Action Plan

New Action Plans can be added to any Self-assessment category. They are REQUIRED for Amber and Red categories.

To create a new Action Plan from within the Self-assessment validation:

1. Select the New hyperlink above the "Connected" Action Plan list.
2. The 'NEW Plan' details open.

Soldier Participation: ▼ Created Date: 15 Jul 2017 Assisted By: Self Completed Date: 17 Jul 2017

Physical - Fitness

Soldier Comments
Assessment: ☹
Priority: MEDIUM
I have some issues with what i can do for physical fitness.

Validator Comments
☒ Concur with Soldier
Soldier is limited due to injury - will work with PT to establish positive profile and identify appropriate fitness activities

Action Plans
Active: → ← Connected: → ← **New**

NEW Plan Save

Description:

Source: Self Assessment Role: Administrator ▼

Category: Fitness Facilitator: _25_ADV_AW2 ▼

Target Date:

Details:

3. Complete all fields.
 - Description: Plan title at least 2 characters in length
 - Source: Defaults to 'Self-Assessment.'
 - Category: Defaults to current Self-assessment category
 - Role: Role of the Facilitator

- Facilitator: Individual tasked with managing the Action Plan
- Target Date: Date for completion of the plan
- Details: What is needed from the Facilitator? (requires at least 5 characters)

4. Click Save.

NOTE: If the Save link is not active, hover over it for more information.

5. The plan description is added to the Connected Action Plans box and a green check indicates the required actions have been completed for the plan.

NOTE: The validator must click SAVE in the Action Plan. Moving to another tab before saving will cause the user to lose their plan information.

Return to [Validate Clinical Self-Assessment](#) or [Validate Non-Clinical Self-Assessment](#).

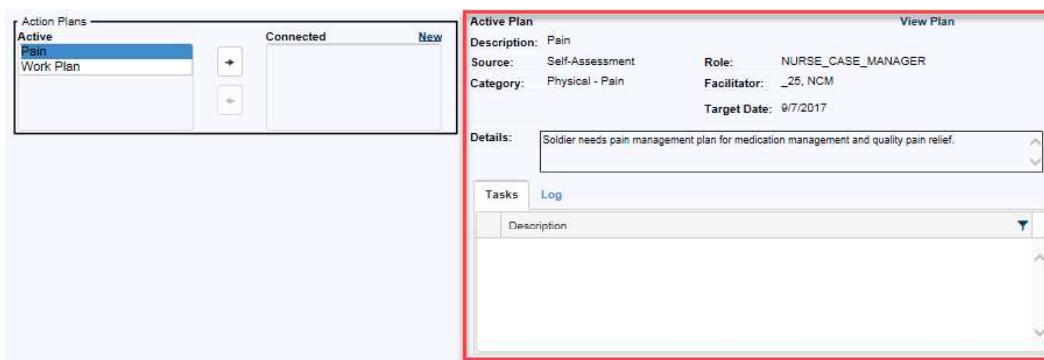
Validation - Connect Existing Action Plan

If an existing Action Plan is relevant for more than one Self-assessment category, it can be connected to additional categories. To connect an existing plan:

1. Locate the existing plan in the Active box.

The screenshot shows a web interface for managing action plans. On the left, under the 'Action Plans' tab, there is an 'Active' box containing a list of plans: 'Pain' and 'Work Plan'. The 'Work Plan' entry is highlighted with a red rectangular border. To the right of the 'Active' box is a 'Connected' box, which is currently empty. Between these two boxes are two arrows: a right-pointing arrow from 'Active' to 'Connected' and a left-pointing arrow from 'Connected' to 'Active'. To the right of the 'Connected' box is a 'New' link. Further to the right, the 'Connected Plan' details are displayed, including fields for 'Description:', 'Source:', 'Category:', 'Role:', 'Facilitator:', and 'Target Date:'. Below these fields is a 'Details:' section with a text input area.

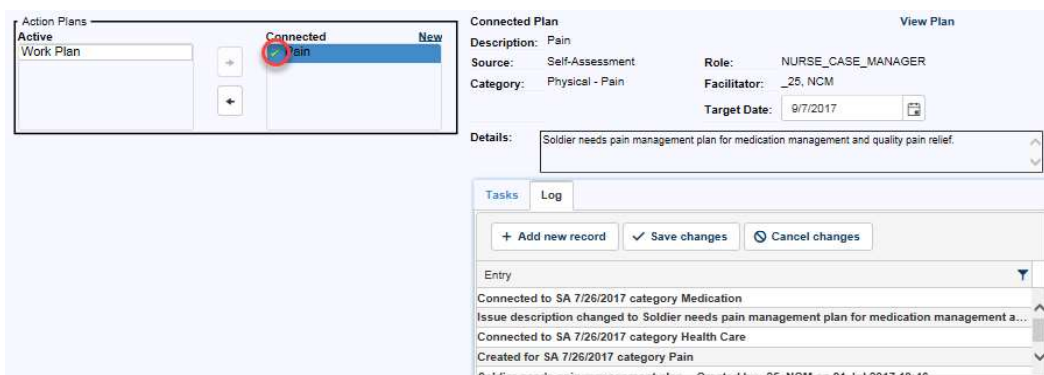
2. Select the desired plan to view the plan details



3. Click the right arrow to move the plan to the Connected box.



4. The plan is now connected to the new category. Connecting an existing plan adds a log note and meets the Action Plan requirement for an amber or red Self-assessment category. A green check will appear next to the plan description.



Return to [Validate Clinical Self-Assessment](#) or [Validate Non-Clinical Self-Assessment](#).

Validation - Update Action Plan

If a plan already exists from a previous self-assessment, it will remain connected to that self-assessment category until it is disconnected or closed. During each validation, a log note must be added to the action plan to meet the requirement.

To update the plan with a log note:

1. Check the Concur box, or enter validator comments.
2. Highlight the plan by clicking on the description in the Connected Action Plan box.

Non-Clinical Self-Assessment Validation

Work Plan (red) Education (red) Employment (red) Weight Control (green) Fitness (red) Well Being (green) Social (green) Family (green) Financial (green) Housing (green)

Administrative Support (red) Transportation (green) Review

Soldier Participation: Face to Face Created Date: 28 Jul 2017 Assisted By: Self Completed Date: 31 Jul 2017

Career - Work Plan

Soldier Comments
SFL-TAP not yet attended. No workshops attended. No Resumes built.
Priority: HIGH

Validator Comments
Comments or concurrence are required.
☒ Concur with Soldier

Action Plans

Active	Connected	New
Pain Management	CER	
Health Care		

Connected Plan View Plan

Description: CER
Source: Self-Assessment Role: TRAN_COORD
Category: Career - Work Plan Facilitator: CER_TC, CER_TC
Target Date: 8/25/2017

Details: Soldier needs to create a CER work plan

Tasks **Log**

☒ Save changes ☐ Cancel changes

Entry

Connected to SA 7/14/2017 category Employment
Connected to SA 7/14/2017 category Education
Created for SA 7/14/2017 category Work Plan

3. The plan will open with the cursor automatically placed in the case log.
4. Enter comments for this category pertaining to the Soldier's current comments.

☒ Save changes ☐ Cancel changes

Entry

Soldier is interested in attending TAP class ASAP and needs help with his resume.

Connected to SA 7/14/2017 category Employment
Connected to SA 7/14/2017 category Education
Created for SA 7/14/2017 category Work Plan

5. Select "Save Changes" to save the log note.

6. A green check next to the plan description indicates the required actions have been completed for the plan.

Return to [Validate Clinical Self-Assessment](#) or [Validate Non-Clinical Self-Assessment](#).

Validation - Disconnect Action Plan

If an Action Plan is no longer needed for a particular category, it can be disconnected.

To disconnect a plan:

1. Highlight the plan in the Connected Action Plan box.

2. Click the left arrow to disconnect the plan.

The screenshot shows the 'Action Plans' section with two columns: 'Active' and 'Connected'. The 'Active' column lists 'Pain Management', 'Health Care', 'ARP orientation', and 'Admin - COAD'. The 'Connected' column shows 'CER' with a 'New' button. A red box highlights the minus sign icon between the columns. To the right, the 'Connected Plan' details are shown: Description: CER, Source: Self-Assessment, Role: TRAN_COORD, Category: Career - Work Plan, Facilitator: CER_TC, CER_TC, Target Date: 8/25/2017. The 'Details' field contains the text: 'Soldier needs to create a CER work plan'.

3. The Remove Action Plan pop-up window appears.

The screenshot shows a pop-up window titled 'Remove Action Plan from Category'. It asks the user to 'Explain why plan 'CER ' is no longer connected to this category?'. A text box contains the text: 'onger looking at school options - wants to focus on intern'. There are 'OK' and 'Cancel' buttons at the bottom.

4. Enter the reason for removing the plan from the current category.
5. Click OK to save, or Cancel to close the window without disconnecting the plan.
6. A log note will be entered when a plan is removed from a self-assessment category.

Return to [Validate Clinical Self-Assessment](#) or [Validate Non-Clinical Self-Assessment](#).

Validation - Close Action Plan

If an Action Plan has been completed:

1. Remove the Action Plan from all associated self-assessment categories (See [Validation - Disconnect Action Plan](#)).
2. Highlight the plan (now in the Active Action Plan column).

The screenshot shows the 'Action Plans' section. The 'Active' column lists 'Pain Management', 'Health Care', 'ARP orientation', and 'Admin - COAD'. The 'ARP orientation' plan is highlighted with a red box. The 'Connected' column shows 'CER' with a 'New' button. To the right, the 'Active Plan' details are shown: Description: ARP orientation, Source: Self-Assessment, Role: WTU_LEADERSHIP, Category: Physical - Physical Fitness, Facilitator: WTU level, PT, Target Date: 8/29/2017. The 'Details' field contains the text: 'Soldier need orientation to ARP and positive profile.'.

- Click View Plan to open the Action Plan in a new window.

The screenshot shows the 'Action Plans' section on the left with a list containing 'Pain Management', 'Health Care', 'ARP orientation' (highlighted), and 'Admin - COAD'. To the right, the 'Active Plan' details for 'ARP orientation' are displayed, including fields for Description, Source, Category, Role, Facilitator, and Target Date. A 'View Plan' button is highlighted in the top right corner of the details section.

- Close the plan (See [Close Action Item](#)).
- Close the pop-up window.
- The plan will disappear from the Active Action Plans box when the screen is refreshed.

Cancel Self-Assessment

PERMISSIONS: CTP Management Analysts or SL/PSG

To cancel a Soldier's Self-Assessment:

- Click on the **Cancel** hyperlink for an active Self-Assessment.

Self-Assessment						Print
						Frequency: Weekly + Available
Issued	Soldier Completed	Assisted by	NCM Validation	PSG/SL Validation	Status	
17 Apr 2017	Cancel				Active	
10 Apr 2017	10 Apr 2017	Self	14 Apr 2017	14 Apr 2017	Complete	

- The Cancel Soldier Self-Assessment dialog box opens.

The screenshot shows the 'Cancel Soldier Self-Assessment' dialog box. It features a 'Cancellation Reason' dropdown menu currently set to 'Inpatient'. Below it is a 'Comments' text area with the text 'Soldier is inpatient following an unexpected ER visit'. At the bottom, there are two buttons: 'Go Back' and 'Cancel This Assessment'.

3. Select cancellation reason, and enter comments.
4. Click **Cancel This Assessment** to cancel the assessment and change the Self-Assessment status to "Cancelled." Click **Go Back** to return to the Self-Assessment screen without cancelling the assessment.

Update Frequency

PERMISSIONS: NCM, PSG, SL or Program Analyst.

NOTE: Frequency defaults to "Every 4 weeks."

To update the frequency and/or availability of the self-assessment for a Soldier:

1. From the Self-Assessment section of the Soldier's case, click the **Frequency** hyper-link.

The screenshot shows the 'Self-Assessment' screen. At the top right, there is a 'Print' button. Below it, the 'Frequency' is set to 'Weekly + Available'. The screen displays a table with the following columns: 'Issued', 'Soldier Completed', 'Assisted by', 'NCM Validation', 'PSG/SL Validation', and 'Status'. The table shows one row of data: '03 Apr 2017', '03 Apr 2017', 'Cadre', '03 Apr 2017', and 'Pending Validation'. The 'Status' column is currently empty.

2. The Self-Assessment Frequency screen opens.

The screenshot shows the 'Self-Assessment Frequency' screen. It includes the following elements:

- Instructions:
 - The frequency value should only be changed at the discretion of the Company Commander.
 - Modifying the frequency will dictate future assessments but will not invalidate a currently active assessment.
 - Changing the Self-Assessment frequency will not change the day of the week on which new assessments are issued.
 - Please use the drop-down menu below to specify the Self-Assessment frequency.
- * Frequency: [Weekly] (dropdown menu)
- Unavailable: ☒
- * Justification: [Large text area for justification]
- Words: 0 Characters: 0
- Buttons: Cancel, Save

3. Select a new frequency from the list box.
4. Click **Save** to update the frequency or click **Cancel** to close the window without saving.

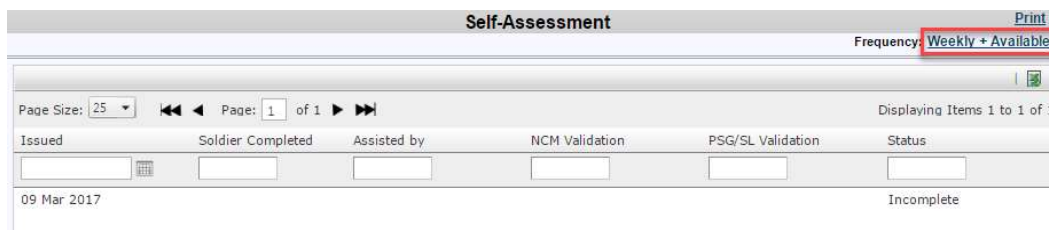
Update Availability

Permissions: The Program Analyst can update self-assessment availability.

Soldier self-assessments can be "turned-off" as needed if the Soldier is not available to complete them. Soldiers in-processed as inpatient will automatically be listed as unavailable until their patient status is changed to outpatient.

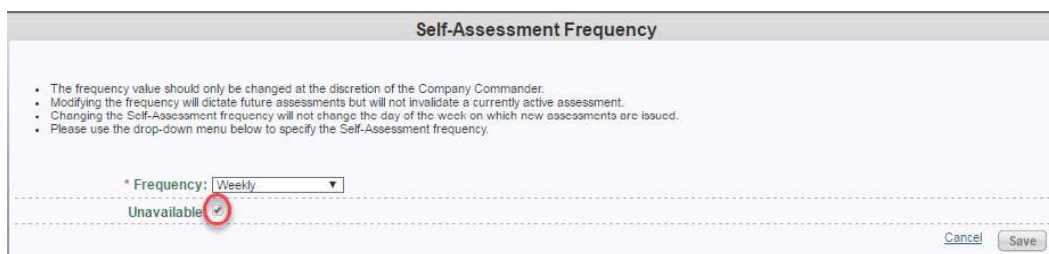
To make Soldier unavailable:

1. Navigate the Self-Assessment section of the Soldier's case.
2. Click on the Frequency link.



The screenshot shows the 'Self-Assessment' window. At the top right, there is a 'Print' button. Below it, the 'Frequency' dropdown is set to 'Weekly + Available'. The window contains a table with the following columns: Issued, Soldier Completed, Assisted by, NCM Validation, PSG/SL Validation, and Status. The first row of data shows '09 Mar 2017' in the 'Issued' column and 'Incomplete' in the 'Status' column. The page size is set to 25, and it is displaying items 1 to 1 of 1.

3. Check the Unavailable box



The screenshot shows the 'Self-Assessment Frequency' window. It contains a list of instructions: 'The frequency value should only be changed at the discretion of the Company Commander.', 'Modifying the frequency will dictate future assessments but will not invalidate a currently active assessment.', 'Changing the Self-Assessment frequency will not change the day of the week on which new assessments are issued.', and 'Please use the drop-down menu below to specify the Self-Assessment frequency.' Below the instructions, there is a '* Frequency:' dropdown menu set to 'Weekly'. Below the dropdown, there is a checkbox labeled 'Unavailable' which is checked. At the bottom right, there are 'Cancel' and 'Save' buttons.

4. Add a date range for the unavailability

Self-Assessment Frequency

- The frequency value should only be changed at the discretion of the Company Commander.
- Modifying the frequency will dictate future assessments but will not invalidate a currently active assessment.
- Changing the Self-Assessment frequency will not change the day of the week on which new assessments are issued.
- Please use the drop-down menu below to specify the Self-Assessment frequency.

* Frequency: Weekly

Unavailable: ☒

* Unavailable From Date: 28 Apr 2017 

* Unavailable To Date: 12 May 2017 

* Justification:

Soldier going on regular leave. Will not have access to CAC reader

Words: 12 Characters: 66

[Cancel](#) [Save](#)

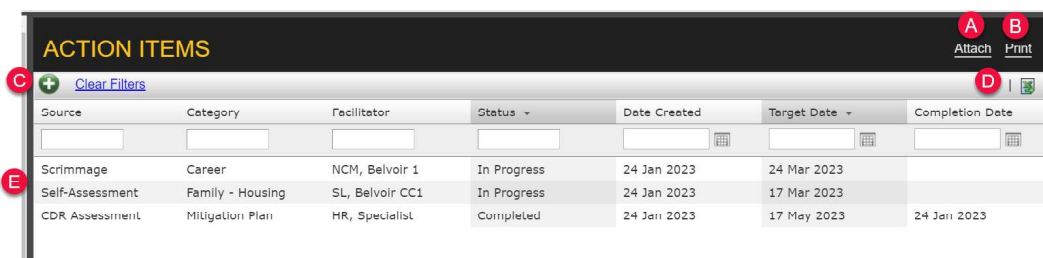
NOTE: Setting a future date in the "Unavailable From Date" is possible. The Soldier's self-assessments will automatically stop on the "From" date and start again on the "To" date.

5. Add a Justification in the text box indicating the reason for unavailability.
6. Save.

NOTE: The Squad Leader, Platoon Sergeant and Nurse Case Manager will receive an email from ARCS three days prior to the Self-assessment availability returning (unless the unavailable period is less than 3 days).

Action Plan

Use the Action Items screen to view and manage action items that the care team must complete on behalf of the Soldier.



The screenshot shows the 'ACTION ITEMS' screen. At the top right are buttons 'A' (Attach) and 'B' (Print). Below the title bar is a '+ Clear Filters' button labeled 'C'. The main table has columns: Source, Category, Facilitator, Status, Date Created, Target Date, and Completion Date. The table contains three rows of data. A red circle 'D' is over the 'Export to Excel' icon at the top right. A red circle 'E' is over the first row of the table.

Source	Category	Facilitator	Status	Date Created	Target Date	Completion Date
Scrimmage	Career	NCM, Belvoir 1	In Progress	24 Jan 2023	24 Mar 2023	
Self-Assessment	Family - Housing	SL, Belvoir CC1	In Progress	24 Jan 2023	17 Mar 2023	
CDR Assessment	Mitigation Plan	HR, Specialist	Completed	24 Jan 2023	17 May 2023	24 Jan 2023

Action Items Screen Items

Label	Name	Description
A	Attach button	Click Attach to add a new attachment
B	Print button	Click Print to print the Action Item screen
C	Add Action Item button	Click the Add icon to add a new action item
D	Export to Excel	Export as a spreadsheet in Excel: Export to Microsoft Excel.
E	View Action Item	Double click the action item to view the details, log, tasks, and attachments

Add Action Item

PERMISSIONS: Administrator, SRU Leadership, RCC, CO Commander, CTP Management Analyst, Nurse Case Manager, Occupational Therapist, SRU Provider, PSG, Social Worker, SSA, Squad Leader, Transition Coordinator, Battalion Commander

To add an action item:

1. Click the Add icon  from the Soldier's profile.
2. The Add Action Item window opens.

The screenshot shows the 'ADD ACTION ITEM' form. It has a dark header bar with the title 'ADD ACTION ITEM' in yellow. Below the header, there are several rows of form fields. The first row has 'Source' (Scrimmage) and 'Position Title' (Social Services As) with an 'Assign to Me' button. The second row has 'Category' (Spiritual) and 'Facilitator' (SSA, Belvoir SRU). The third row has 'Status' (In Progress) and 'Target Date' (24 Feb 2023). The fourth row has 'Description' (Chaplain Referral). Below these is a large text area for the action item description, which contains the text 'Soldier is interested in getting more information on religious activities available on post'. At the bottom right of the form are 'Cancel' and 'Submit' buttons.

3. Enter the action item details for all fields:
4. Category Options are specific to the selected Source.
5. Select a role to assign an action item to a facilitator for review and completion.
6. Click **Submit** to add the action item, which creates an ID number automatically and Action Item Details tab is displayed, or click **Cancel** to close the window without adding the action item.

NOTE: Email notifications to the assigned facilitator and case logs are generated for new action items.

View Action Item Details

To open an action item for viewing or editing, click on the Source hyperlink. The action item opens to show the Action Item Details, Log, Tasks, and Attachments tabs.

The screenshot shows the 'Edit Action Item' interface. At the top, there are four tabs: 'Details' (labeled A), 'Log' (labeled B), 'Tasks' (labeled C), and 'Attachments' (labeled D). To the right of the tabs are 'Attach' (labeled E) and 'Print' (labeled F) buttons. Below the tabs, the form contains the following fields and labels:

- Date Created:** 17 Aug 2017
- Action Item ID:** 000001277
- Created By:** _25, NCM
- Status:** In Progress
- Source:** Self-Assessment (labeled H)
- Open Tasks:** 0 (labeled I)
- Category:** Physical - Health Care
- Target Date:** 26 Sep 2017
- Facilitator:** _25, NCM
- Completion Date:**
- Soldier Assess/Priority:** [Yellow Circle] / High
- Soldier Comments:** Have several medical issues that require follow-up/further diagnosis
- Description:** Health Care
- Action Item Details:** This plan will document medical needs for Ortho and pain related medical issues.

At the bottom right, there is an 'Edit' button (labeled G) and a 'Close' button (labeled J).

View Action Item Screen Items

Label	Name	Description
A	Action Item Details tab	Click the Action Item Details tab to view and edit issue details.
B	Log tab	Click the Log tab to manage action item log entries
C	Tasks tab	Click the Tasks tab to manage tasks for the action item
D	Attachments tab	Click the Attachments tab to manage attachments for the action item
E	Attach hyper-link	Click Attach to add an attachment to the Soldier's case. This attachment IS NOT associated with an Action Plan.
F	Print button	Click Print to print the currently selected tab
G	Edit button	Click Edit to edit the action item details
H	Source hyper-link	Click the hyperlink (if available) to view the summary screen for the source (for example, Self-Assessment Summary).
I	Open Tasks	Counter indicating the number of open tasks. An Action Item cannot be closed if there are open tasks.
J	Close hyper-link	Click Close to return to the Action Items screen.

Edit Action Item

To edit the action item:

1. Open the Action Item from the Action Plan page.
2. Click **Edit** on the Action Item Details tab.
3. The Edit Action Item window opens.

Edit Action Item Detail

* Source: Scrimmage * Position Title: Transition Coordi...

* Category: Career * Facilitator: CER_TC, CER_TC

* Status: In Progress * Target Date: 30 Sep 2022

* Description: Career Assessment

* Details:

Soldier is interested in a formal career assessment so she can begin looking at post-military options.

Words: 16 Characters: 102

Cancel Save

4. Update the action item details.

NOTE: The details section is only editable for 24 hours after creation. All subsequent entries should be made in the [Log Tab](#).

5. Click **Save** to save the changes or click **Cancel** to close the window without saving.

NOTE: If the Facilitator is changed, an email notification is automatically sent to the new Facilitator.

Re-assign Action Item

If an Action Item is assigned in error, or needs to be raised up the chain of command, it should be re-assigned to another user.

To re-assign an Action Item to another user:

1. Select Edit from the Action Item Details tab.
2. Select a new Role and Facilitator from the drop down lists.
3. **Save** or **Cancel** to save without changes.

The new facilitator of the Action Item will receive an email notification for the Action Item.

Log Tab

Use the Log tab to manage log entries for a specific action item. Action item log entries will be automatically added to the case log.

Edit Action Item [Attach](#) [Print](#)

Details **Log** Tasks Attachments

Action Item Summary

Source: Self-Assessment Category: Physical - Health Care

Facilitator: _25, NCM Target Date: 29 Sep 2017

Soldier Assess/Priority: / High

Soldier Comments: Have several medical issues that require follow-up/further diagnosis

Log Entries

Update	Date Created	Added By	Text	Delete
	25 Sep 2017 (C)	Real, 000 AdminReal	Issue description changed to This plan will document medical needs for Ortho and pain related medical issues., by Real, 000 AdminReal on 25 Sep 2017 11:13	
	25 Sep 2017	Real, 000 AdminReal	Issue target date changed from 08 Sep 2017 to 29 Sep 2017, by Real, 000 AdminReal on 25 Sep 2017 11:12	
	17 Aug 2017	_25, NCM	Created for SA 7/29/2017 category Health Care	
	17 Aug 2017	_25, NCM	Details... - Created by _25, NCM on 17 Aug 2017 12:15.	

Action Item - Log Tab Items

Label	Name	Description
A	Add icon	Click the Add icon to add a new action item log entry
B	Edit icon	Click the Edit icon to edit the action item log entry
C	Date Created hyper-link	Click a Date Created hyperlink to view the action item log entry
D	Delete icon	Click the Delete icon to delete a log entry

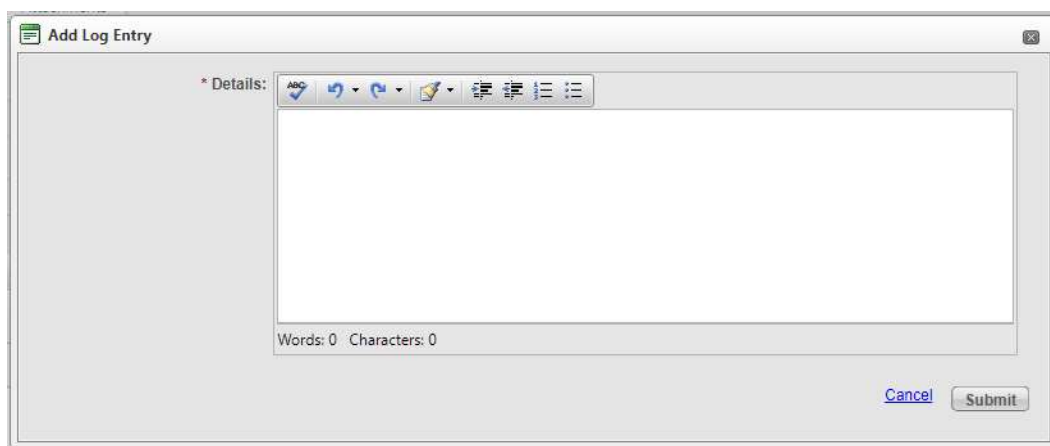
Add Action Item Log Entry

To add an action item log entry:

1. Click the Add icon .



1. The Add Log Entry window opens.



3. Enter details for the log entry in the Details field.
4. Click Submit to add the log entry or click Cancel to close the window without saving.

Edit Action Item Log Entry

PERMISSIONS: Administrator, other users may edit their own log entries for 24 hours only.

To edit a log entry:

1. Click the Edit icon  to the left of the log entry.
2. The Edit Log Entry window opens.

Edited screenshot of the "Edit Log Entry" dialog box. The dialog displays the "Created Date" as 16 Mar 2012 and "Added By" as WTU, NCM1. The "Details" section shows a text area with the content: "setup schedule for Soldier to improve - Created by WTU, NCM1 on 16 Mar 2012 12:32.". The dialog includes a rich text editor toolbar and "Cancel" and "Save" buttons at the bottom right.

3. Make any changes to the log entry.
4. Click Save to save the changes or click Close to close the dialog box without saving.

View Action Item Log Entry

To view an issue log entry:

1. Click on a **Date Created** hyperlink.
2. The View Log Entry window opens (*Read-Only*)

Edited screenshot of the "View Log Entry" window. The window displays the "Created Date" as 16 Mar 2012 and "Added By" as WTU, NCM1. The "Details" section shows the text: "setup schedule for Soldier to improve - Created by WTU, NCM1 on 16 Mar 2012 12:32.". The window includes a "Close" button at the bottom right.

3. Click **Close** to close the window.

Delete Action Item Log Entry

PERMISSIONS: Administrator

To delete a log entry, click the Delete icon  to the right of the log entry. This action cannot be reversed.

Self-Assessments Tab

Self-Assessment tab displays all self-assessment data associated with this action plan.

Edit Action Item [Attach](#) [Print](#)

Details Log **Self-Assessments** Tasks Attachments

Action Item Summary

Source: Self-Assessment Category: Physical - Pain

Facilitator: NCM, Belvoir 1 Target Date: 15 Apr 2021

Soldier Assess/Priority:  / Medium

Soldier Comments: right knee, right shoulder are constantly in pain. I have started having really bad headaches this week. Had to go to the ER for relief this week.

Connected Self-Assessments

Date Created	Category	Assessment	Priority	Soldier Comments	Validator Comments
08 Apr 2021	Health Care		High	Need Ortho Follow up. Need additional PT for R knee. Want to quit dipping, quit date: 11 May, need help getting Nicorette Gum	
23 Nov 2020	Pain		Medium	right knee, right shoulder are constantly in pain. I have started having really bad headaches this week. Had to go to the ER for relief this week.	testing

Tasks Tab

Use the Tasks tab to manage work which needs to be done by yourself or other members of the care team as part of a specific action item.

Edit Action Item [Attach](#) [Print](#)

Details Log **Tasks** Attachments

Action Item Summary

Source: Self-Assessment Category: Physical - Health Care

Facilitator: _25, NCM Target Date: 29 Sep 2017

Soldier Assess/Priority:  / High

Soldier Comments: Have several medical issues that require follow-up/further diagnosis

Tasks

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

Date Created	Assigned To	Description	Due Date	Complete Date
25 Sep 2017	_25, NCM	ortho appt	06 Oct 2017	

Action Item - Tasks Tab Items

Label	Name	Description
A	Add icon	Click the Add icon to add a new action item task
B	Date Created hyper-link	Click a Date Created hyperlink to view the action item task

Add Action Item Task

To add an action item task:

1. Select the Tasks tab within the Action Plan.

2. Click the Add icon .
3. The Add Task window opens.

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

NOTE: The Due Date must be a future date.

- Click **Save** to add the task or click **Cancel** to close the window without saving changes.
- An email is sent to the Assignee notifying them of the task.

NOTE: Do not reassign tasks, no notification is generated if the Assigned To field is changed.
The best practice is to close the existing task and create a new task for the correct facilitator.

View Action Item Task

To view details for an action item task:

- Click on the **Date Created** hyperlink
- The Task Details screen opens.

Task Details [Print](#) [Edit](#)

Creation Date: 25 Sep 2017 Assigned To: J25, NCM
 Role: Nurse Case Manager Due Date: 06 Oct 2017
 Status: Open Date Completed:
 Description: ortho appt
 Details: Schedule ortho for after 10/15

Task Logs

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

Date	Created By	Text
25 Sep 2017	Real, 000 AdminReal	Waiting on provider availability - new provider arrival next week.

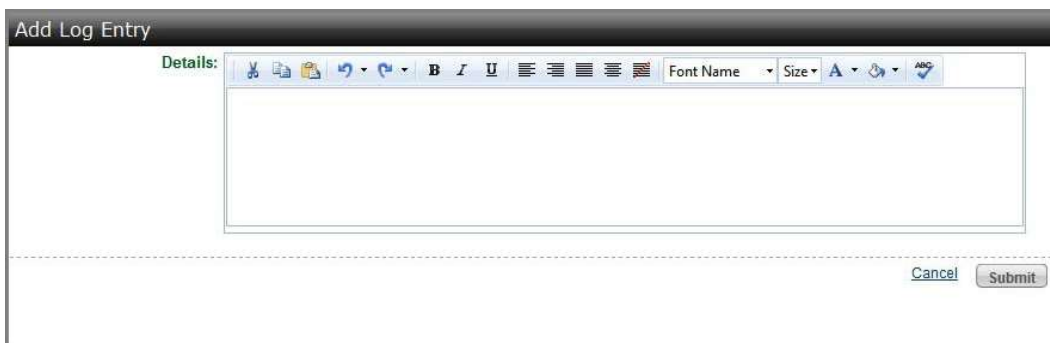
Action Item - Tasks Tab Items

Label	Name	Description
A	Edit button	Click the Edit button to edit the task
B	Add icon	Click the Add icon to add a new task log entry
C	Edit icon	Click the Edit icon to edit the task log entry
D	Date hyperlink	Click a Date Created hyperlink to view a task log entry
E	Close hyperlink	Click the Close hyperlink to return to the Tasks tab.

Add Task Log Entry

To add a task log entry:

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



3. Enter comments for the log entry.
4. Click **Submit** to save the task log entry or click **Cancel** to close the dialog box without saving.

Edit Task Log Entry

NOTE: Users may edit their own log entries for 24 hours. Beyond that time, editing will not be available.

To edit a task log entry:

1. Click the Edit icon  to the left of the log entry.
2. The Edit Log Entry window opens.

Log Entry Details

Created Date: 20 Mar 2012

Added by: Ulrich, Kim

Details:

Intake Comments: Mrs. Jones mentioned that Tim has been acting depressed the last couple weeks.

Close Save

3. Make changes to the task log entry.
4. Click **Save** to save the task log entry or click **Cancel** to close the window without saving.

Reassign Task

If a task is assigned in error, or needs to be raised up the chain of command, it should be re-assigned to another user.

To re-assign a task to another user:

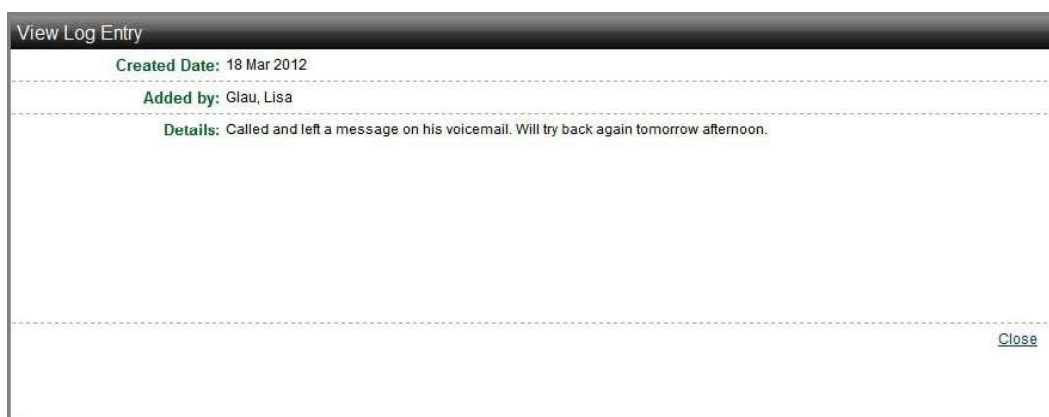
1. Select Edit from the task page.
2. Select a new Role and Facilitator from the drop down lists.
3. **Save** or **Cancel** to save without changes.

The new facilitator of the task will receive an email notification for the assigned task.

View Task Log Entry

To view a task log entry:

1. Click the **Date Created** hyperlink.
2. The View Log Entry window opens.



The 'View Log Entry' window displays the following information:

- Created Date:** 18 Mar 2012
- Added by:** Glau, Lisa
- Details:** Called and left a message on his voicemail. Will try back again tomorrow afternoon.

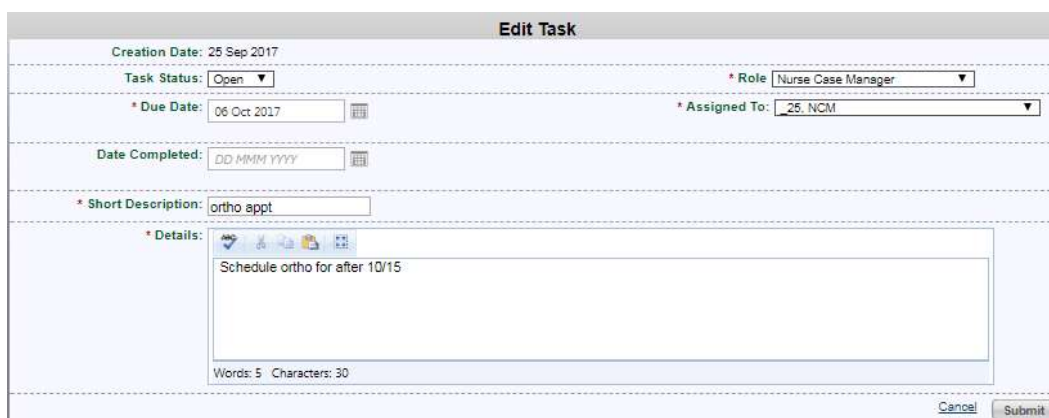
A [Close](#) button is located in the bottom right corner.

3. Click Close to close the window.

Edit Task

To edit a task:

1. Click the **Edit** button.
2. The Edit Task window opens.



The 'Edit Task' window contains the following fields and controls:

- Creation Date:** 25 Sep 2017
- Task Status:** Open (dropdown menu)
- * Role:** Nurse Case Manager (dropdown menu)
- * Due Date:** 06 Oct 2017 (calendar icon)
- * Assigned To:** 25, NCM (dropdown menu)
- Date Completed:** DD MMM YYYY (calendar icon)
- * Short Description:** ortho appt
- * Details:** A text area containing 'Schedule ortho for after 10/15'. Below the text area, it shows 'Words: 5 Characters: 30'.

Buttons for [Cancel](#) and [Submit](#) are located at the bottom right.

3. Update the task information.

NOTE: If you change the Task Status to “Closed,” the Date Completed field is populated with the current date.

- Click **Submit** to save the changes or click **Cancel** to close the window without saving.

Attachments Tab

Use the Attachments tab to manage files attached to a specific action item.

Action Item - Attachments Tab Items

Label	Name	Description
A	Add icon	Click the Add icon to add a new attachment
B	Edit icon	Click the Edit icon to edit the attachment
C	View 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 icon	Click the Delete icon to delete the attachment

Close Action Item

NOTE: All associated tasks must be closed before an action item can be closed.

To close an action item:

- Go to the Action Item Details tab.
- Click **Edit**.

3. Select "Completed" from the Status list box.

4. Click **Save** to complete the action item or click **Cancel** to return to the Action Items screen without saving.
5. The Action Item completed date will populate automatically.

Army Recovery Care Division (RCD) Referral

RCD supports severely wounded, ill and injured Soldiers, Veterans and their Families throughout their recovery and transition. Through the local support of an RCC, RCD strives to foster the Soldier's independence. Soldiers who qualify for RCD are assigned to the program as soon as possible after arriving at a Soldier Recovery Unit (SRU). For information on RCD eligibility, see the Soldier and Leader Guide.

RCD Referral is a two-step process in ARCS-SRU.

1. Create Action Item for the RCC

Create an action item from inside a Soldiers case by clicking on **Action Plan**.

Action Items							Attach	Print
+ 1 25 Page 1 of 1, rows 1 to 12 of 12								
Source	Category	Facilitator	Status	Date Created	Target Date	Completion Date		
Self-Assessment	Emotional - Behavioral Health	Ganapathy, Vijay	Completed	31 Jul 2017	09 Aug 2017	31 Jul 2017		
Self-Assessment	Physical - Health Care	_25, NCM	Completed	27 Jul 2017	11 Aug 2017	31 Jul 2017		

- Click on the Add icon  to create new action item.

Add Action Item

* Source:

* Role:

* Category:

* Facilitator:

Status: In Progress

* Target Date:

* Description:

* Details: (Maximum Length 2000)

Review Soldier's record for AW2 eligibility. ST is likely eligible due to combat related injuries.

Words: 15 Characters: 100

Cancel

Submit

- Add Action Item Required Items:
 - Source** – Select RCC from the dropdown list
 - Role** – Select RCC from the dropdown list
 - Category** – Select AW2 Referral from the dropdown list
 - Facilitator** – Select the appropriate RCC from the dropdown list
 - Target Date** – Enter or pick a target date in the future
 - Details** – Complete a narrative in the log area inside the action item that describes the reason(s) the referrer believes the Soldier is eligible.

- Click **Submit** to create the action item or Cancel to discard.

The Action Item is created, RCC is notified, and the action item appears on the RCC Action Items main view.

2. Upload Documentation

After creating the referral, upload all supporting documentation necessary to substantiate the RCD referral. For more information on AW2 eligibility, see the Soldier Leader Guide.

1. Click the Attachments tab within the Action Item.

The screenshot shows the 'Edit Action Item' form. At the top, there are tabs for 'Details', 'Log', 'Tasks', and 'Attachments'. The 'Attachments' tab is selected and highlighted with a red box. Below the tabs is the 'Action Item Summary' section, which includes fields for 'Source: AW2/RCC', 'Facilitator: _25, ADV_AW2', 'Category: AW2 Referral', and 'Target Date: 06 Oct 2017'. Below this is the 'Attachments' section, which has a green plus icon in a circle to add new attachments. Below the icon is a table with columns: 'File Name', 'Document Type', 'Document Date', 'Added By', and 'Added On'. The table is currently empty, and a message at the bottom left says 'No Records Found'.

2. Click on the add icon  to add a new attachment.
3. The document will then be available inside the action item.

The RCC will initiate the referral action to the RCD Medical Eligibility section inside the RCD module. Once the Soldier's eligibility has been assessed, the RCC will edit the action item and select Completed from the status drop down then select Save. The action item is now closed. The action item will no longer appear on the "Action Items" view.

Appointments

Use the Appointments screen to view and manage appointment information for the Soldier. This consolidated view will show any appointments pulled from AHLTA/CHCS along with any manually entered appointments for the Soldier.

CHCS appointments are view only with a light yellow background.

Manual Appointments added in ARCS include off-post medical appointments, scrimmage and FTR appointments, and other appointments added by SRU Cadre.

The screenshot displays the 'SOLDIERS' SRU Module interface. At the top, there are navigation tabs: 'Appointments' (labeled A), 'Calendar' (labeled B), 'No Shows' (labeled C), 'ER Visits' (labeled D), and 'Admission History' (labeled E). Below these tabs is a date range selector with 'From' and 'To' fields, both set to '26 Jan 2023' (labeled F). A 'Page size' dropdown is set to '25' (labeled H), and the page number is '1' (labeled G). The main table lists appointments with columns: 'Date/Time (Local Time)', 'End Time (Local Time)', 'Duration', 'Clinic/Location', 'Status', 'Facilitator', and 'Type'. The table contains four rows of data, each with a checkbox in the first column (labeled I, J, K, L).

	Date/Time (Local Time)	End Time (Local Time)	Duration	Clinic/Location	Status	Facilitator	Type
☒	27 Jan 2023 17:45	18:45	1:00	Dental Office	Pending	Dr. Adams	Dental
☒	30 Jan 2023 14:45	15:45	1:00	WTU Social Work Office	Pending	SW	Training
☒	02 Feb 2023 08:15	09:15	1:00	HS Teams	Pending	SL	Phase II Goal Setting
☒	06 Feb 2023 14:45	15:45	1:00	WTU Social Work Office	Pending	SW	Training

Appointments Screen Items

Label	Name	Description
A	Appointments tab	Click the Appointments tab to manage appointments for the Soldier.
B	Calendar tab	Click the Calendar tab to view daily, weekly, or monthly calendar view.
C	No Shows tab	Click the No Show tab to view a list of appointments the Soldier did not attend.
D	ER Visits tab	Click the ER Visits tab to view a list of any emergency room visits for Soldier.
E	Admission History tab	Click the Admission History tab to view admission information for the Soldier.
F	Date range	Controls the date range for the selected grid. Defaults are: • Appointments - 1 month in the future • No Shows - 1 month in the past
G	Export icon	Click the Excel icon to export the grid.
H	Add icon	Click the Add icon to add a manual appointment.
I	Edit icon	Click the Edit icon to edit a manually added appointment.
J	View Series Icon	View series details. Delete Series function. Series cannot be modified at this time.
K	View Appointment icon	Click the View icon to view details for any appointment.
L	Delete icon	Click the Delete icon to delete a manually added appointment.

View Appointment

To view appointment details, click the view appointment icon  .

1. The Appointment Details screen opens.

View Appointment not in AHLTA/CHCS

Recurrence: WEEKLY	Status: Pending
Start Date: 26 Jan 2023	End Date: 26 Jan 2023
Start Time: 15:00	End Time: 16:00
Location: SRU Conference Room	Facilitator: SSG Jones
Type: Counseling	
Created By: Real, 000 AdminReal	Updated By: Real, 000 AdminReal
Details: Please update goals prior to this meeting.	

Cancel

NOTE: This view is read-only.

2. Click **Cancel** to return to the Appointments grid.

Edit Appointment

NOTE: You can only edit appointments entered manually into ARCS SRU, not appointments pulled from AHLTA / CHCS.

To edit an appointment:

1. Click the **Edit** icon .
2. The Edit Appointment Details screen opens.

Edit Appointment not in AHLTA/CHCS

Recurrence: WEEKLY

* Date: 02 February 2023

* Start Time: 15:00

* Location: SRU Conference Room

* Type: Counseling

* Status: Pending

* End Date: 02 February 2023

* End Time: 16:00

* Facilitator: SSG Robbins

Created By: Real, 000 AdminReal

Updated By: Real, 000 AdminReal

Comments: Please update goals prior to this meeting.

Words: 7 Characters: 43

Validate Conflicts Cancel Save

3. Select a Status from the list box.

NOTE: If you select “No Show” the No Show Reason fields become active below the appointment details. If saved, the No Show appointment will appear on the No Show tab.

4. Click **Save** to save the appointment or click **Cancel** to close the appointment without saving any changes.

You can edit appointment details until the appointment date passes. Once the appointment date passes:

- You can only edit the status (for 24 hours before it becomes read-only).
- If you set the status to “No Show,” the No Show reason and comments are editable (for 24 hours before it becomes read-only).

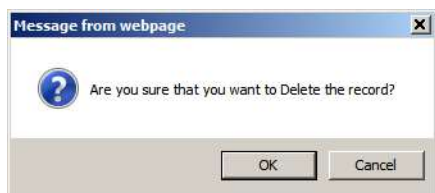
NOTE: If you are editing an appointment that has already occurred, then only the Status and Comments fields will be active. All other fields will be read-only.

Delete Appointment

NOTE: You can only delete appointments entered manually into ARCS SRU, not appointments retrieved from AHLTA/CHCS. Appointments that have already occurred in the past cannot be deleted.

To delete an appointment:

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



3. Click **OK** to delete the appointment or click **Cancel** to close the dialog box without deleting.

Add Appointment

To add an appointment:

1. Click the Add icon .
2. The Add Appointment screen opens.

The screenshot shows a software window titled "Add Appointment not in AHLTA/CHCS". It contains several input fields: "Recurrence" is a dropdown menu set to "None"; "Date" is a date picker showing "26 January 2023"; "Start Time" is a time picker; "Location" is a text input field; "Type" is a dropdown menu; "Status" is a dropdown menu; "End Date" is a date picker showing "26 January 2023"; "End Time" is a time picker; and "Facilitator" is a text input field. Below these fields is a "Comments" section with a rich text editor toolbar and a large text area. At the bottom of the text area, it says "Words: 0 Characters: 0". At the bottom right of the window are three buttons: "Validate Conflicts", "Cancel", and "Save".

4. Complete appointment fields.

NOTE: To schedule an appointment that occurred in the past, contact the ARCS Service Desk for assistance.

5. Select **Validate Conflicts** to view potential conflicts on the Soldier's schedule. ARCS will detect:

- CHCS appointments beginning before or during the listed time
- Manual appointments overlapping the listed time

NOTE: The Status will automatically be set to "Pending."

5. Click **Submit** to add the appointment or click **Cancel** to return to the Appointments screen without saving.

View, Edit or Delete Series

View Series Details

To view the details for a series appointment:

1. Select the "Display Appointment Series Information" icon from the Appointments grid.

Soldiers

Appointments No Shows ER Visits Admission History

From: 18 Jan 2019 To: 18 Feb 2019

Page size: 25 Page 1 of 1, rows 1 to 6 of 6

	Date/Time	End Time	Duration	Clinic/Location	Status	Facilitator	Type
	18 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other
	19 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other
	20 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other
	21 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other
	22 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other
	23 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other

Recurrence: DAILY **Status:** Pending

Location: Duty Desk **Series Start Date:** 24 Jan 2019

Facilitator: SGT Smith **Series End Date:** 23 Jan 2019

Type: Other **Appointment Time:** 10:00

Selected Date: 18 Jan 2019

[Delete Series](#) [Close](#)

Delete Series Appointments

To delete appointments in a series

1. Select Delete Series from the series details popup.

Recurrence: DAILY **Status:** Pending

Location: Duty Desk **Series Start Date:** 24 Jan 2019

Facilitator: SGT Smith **Series End Date:** 23 Jan 2019

Type: Other **Appointment Time:** 10:00

Selected Date: 18 Jan 2019

[Delete Series](#) [Close](#)

2. Confirm the deletion by clicking OK.

NOTE: Deleting a series will delete the appointment selected and all FUTURE appointments in the series. Any appointments before the selected appointment will be unaffected.

Example: Deleting the series by opening the series for the 22 Jan appointment will delete only 22 and 23 Jan.

			18 Jan 2019 10:00	11:00	1:00	Duty Desk	Kept	SGT Smith	Other	
			19 Jan 2019 10:00	11:00	1:00	Duty Desk	Kept	SGT Smith	Other	
			20 Jan 2019 19:00	20:00	1:00	Duty Desk 2	Pending	SGT Smith	Other	
			21 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other	
			22 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other	
			23 Jan 2019 10:00	11:00	1:00	Duty Desk	Pending	SGT Smith	Other	

Edit Appointment in a Series

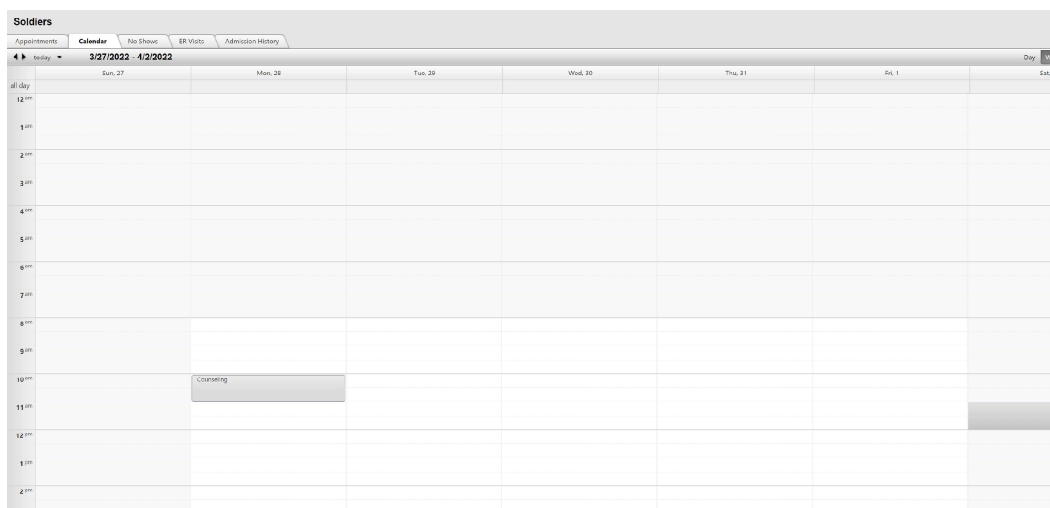
NOTE: Editing a single appointment in a series will remove that appointment from the associated series.

To edit an appointment in a series, follow instructions to [Edit Appointment](#).

Multiple appointments in a series cannot currently be edited. To change the series, delete the series at the point of the change and create a new series.

Calendar Tab

Use the Calendar tab to view scheduled appointment for Soldiers assigned to you in a monthly and weekly view. Manage appointments at the group level.



View No Shows

No Show appointments are appointments with a status of “No Show.” You can view these from the No Shows tab. To log a No-Show, return to the Appointments tab and edit to reflect the "No-Show" status (see: [Edit Appointment](#)).

Soldiers

AppointmentsNo ShowsER VisitsAdmission History

From: 19 Dec 2017To: 19 Jan 2018

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

Date/Time	Duration	Clinic/Location	Status	Facilitator	Type	Reason	Action
 31 Dec 2017 08:00	1:30	 Washing Hospital Center	No Show	Gerome	Counseling	Forgot	Counseled Soldier
 31 Dec 2017 14:00	1:00	 DC Trauma Center	No Show	Meredith	Education - Class	Decided not to go	Counseled Soldier on cancellation procedures

1. Click the Edit icon  to edit the reason, action, or comments.

NOTE: A No Show Reason, Action, and Comments may be added for all appointments, including those pulled from AHLTA/CHCS.

2. The Edit Appointment Details screen opens.

Edit Appointment not in AHLTA/CHCS

Recurrence: WEEKLY

* Date: 26 January 2023

* End Date: 26 January 2023

* Start Time: 15:00

* End Time: 16:00

* Location: SRU Conference Room

* Facilitator: SSG Jones

* Type: Counseling

Created By: Real, 000 AdminReal

Updated By: Real, 000 AdminReal

Comments:

Please update goals prior to this meeting.

Words: 7 Characters: 43

No Show Reason

* Reason: Forgot

* Action: Counseled Soldier

Comments:

Forgot this appointment.

Words: 3 Characters: 25

Validate Conflicts Cancel Save

- Click **Save** to save the No Show reason or click **Cancel** to return to the No Shows tab without saving.

View ER Visits

Emergency Room (ER) visits are added in AHLTA/CHCS. This tab is read-only in the SRU module.

Soldiers				
Appointments	No Shows	ER Visits	Admission History	
1 25 Page size: 25 Page 1 of 1, rows 1 to 1 of 1				
MTF	Status	Facilitator	Date/Time	Type
BROOKE ARMY MEDICAL CENTER	KEPT		22 Sep 2017 14:50	EROOM

View Admission History

Hospital admissions are added in AHLTA/CHCS. This tab is read-only in the SRU module.

Soldiers			
Appointments	No Shows	ER Visits	Admission History
Location	Admission Ward	Admission Date/Time	Discharge Date/Time
BA 2T SICU	BROOKE ARMY MEDICAL CENTER	11 Nov 2016 19:13	13 Sep 2017 11:01

Case Logs

Use the Case Log screen to view consolidated case log entries. Case logs are updated by the system automatically at various points in the SRU life cycle. You can also manually add entries to the case log.

CASE LOG				
1 2 3 4 5 6 Page size: 25 Page 1 of 6, rows 1 to 25 of 132				
Date Added	Added By	Type	Text	Delete
31 Jan 2024	Real, 000 AdminReal	Task Log	Task: Test Assigned to Z_DoNotModify_UJ_CDR. Due on: 31 Jan 2024 Details: test	
31 Jan 2024	Real, 000 AdminReal	Case Log	File attached by Real, 000 AdminReal on 31 Jan 2024 File Name: Other Goal Setting	
31 Jan 2024	Real, 000 AdminReal	Case Log	File attached by Real, 000 AdminReal on 31 Jan 2024 File Name: Education Degree Plan	
31 Jan 2024	Real, 000 AdminReal	Action Item Log	File attached by Real, 000 AdminReal on 31 Jan 2024 File Name: Lead Coordinator Checklist	

Case Log Screen Items

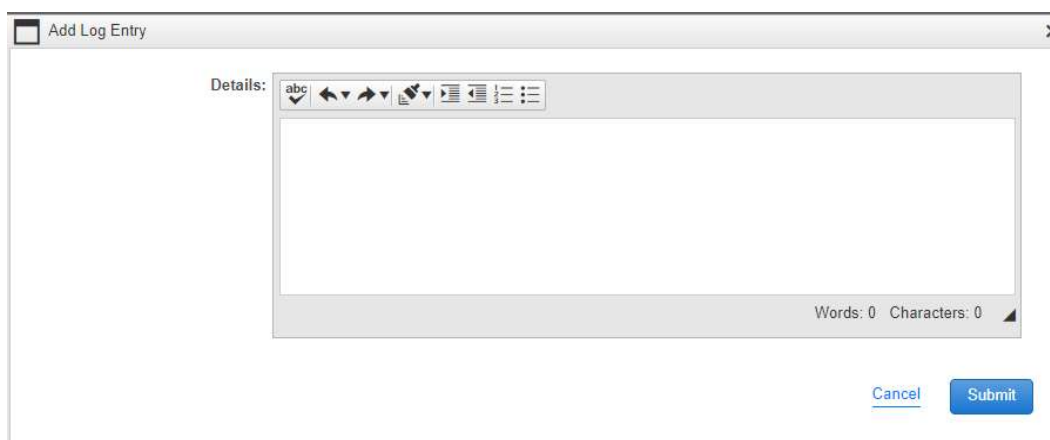
Label	Name	Description
A	Print icon	Click print to print the Case Log grid.
B	Export Icon	Click the export icon to export the grid to a Microsoft Excel or PDF Document.
C	Add Case Log Entry icon	Click the Add icon to add a case log entry
D	Edit Case Log Entry icon	Click the Edit icon to edit a case log entry
E	Date Added hyper-link	Click a Creation Date hyperlink to view a case log entry
F	Delete Case Log Entry icon	Click the Delete icon to delete a case log entry

NOTE: Manually added logs can be edited or deleted for up to 24 hours after creation by the person who created the entry.

Add Case Log Entry

To add a case log entry:

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



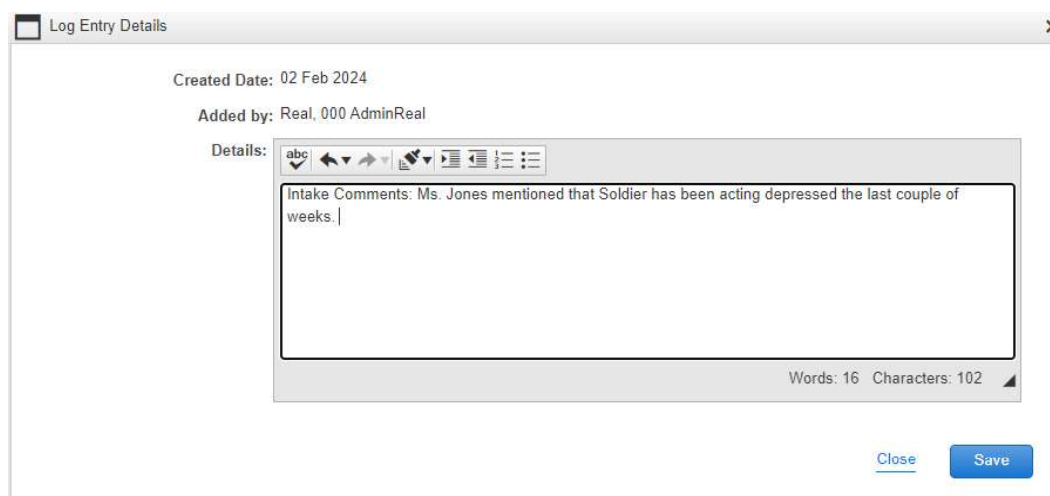
The 'Add Log Entry' dialog box features a title bar with a close button. Inside, there is a 'Details' section with a text input field containing 'abc' and a rich text editor toolbar. Below the input field is a large empty text area. At the bottom right, there are 'Cancel' and 'Submit' buttons. A status bar at the bottom right of the text area shows 'Words: 0 Characters: 0'.

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.

Edit Case Log Entry

To edit a case log entry:

1. Click the Edit icon  to the left of the log entry.
2. The Edit Log Entry dialog box opens.



The 'Log Entry Details' dialog box has a title bar with a close button. It displays metadata: 'Created Date: 02 Feb 2024' and 'Added by: Real, 000 AdminReal'. Below this is a 'Details' section with a text input field containing 'abc' and a rich text editor toolbar. The main text area contains the text 'Intake Comments: Ms. Jones mentioned that Soldier has been acting depressed the last couple of weeks.' At the bottom right, there are 'Close' and 'Save' buttons. A status bar at the bottom right of the text area shows 'Words: 16 Characters: 102'.

3. Make any changes to the log entry.
4. Click **Save** to save the changes or click **Close** to close the dialog box without saving the changes.

View Case Log Entry

To view a case log entry:

1. Click on the **Date Added** hyperlink for the entry.
2. The Log Entry Details dialog box opens.

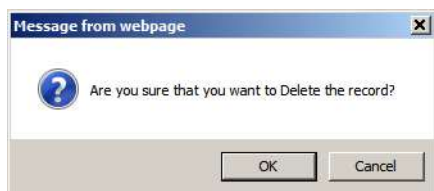


3. Click the **Close** hyperlink to close the dialog box.

Delete Case Log Entry

To delete a case log:

1. Click the **Delete** icon  to the right of the log entry.
2. The Delete Log dialog box opens.



3. Click **OK** to delete the case log entry or click **Cancel** to close the dialog box without deleting.

Attachments

Use the Attachments screen to attach documents to a Soldier's case as a reference for yourself and other users to track and view information related to that Soldier's case.

NOTE: Attachments added through Action Items and Transition Tracker Checklist Items will also be shown in the case attachment list.

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	Edit Attachment icon	Click the Edit icon to edit the attachment details
C	View Attachment Details hyperlink	Click the View hyperlink to view the attachment details
D	View PDF Attachment icon	Click the View PDF icon to view the attachment in a pop-up.
E	File Name hyperlink	Click the file name hyperlink to download the attachment
F	Associated Item hyperlink	Click the associated item hyperlink to view the item.
G	Archive Attachment icon	Click the Delete icon to delete the attachment

Edit Attachment

To edit an attachment:

1. Click the Edit icon  to the left of the attachment.
2. The Edit Attachment window opens.

3. Make any changes.
4. Click **Save** to save the attachment or click **Cancel** to close the window without saving.

View Attachment Details

To view details for any attachment:

1. Click the **View** hyperlink:
2. The Attachment Details window opens.



The screenshot shows a window titled "Attachment Details". Inside the window, there are four fields: "File Name: Resume", "Document Type: Resume", "Document Date: 10 Jan 2011", and "Comments: [text area]". The text area is empty and has a small scroll bar on the right. At the bottom right of the window, there is a "Close" hyperlink.

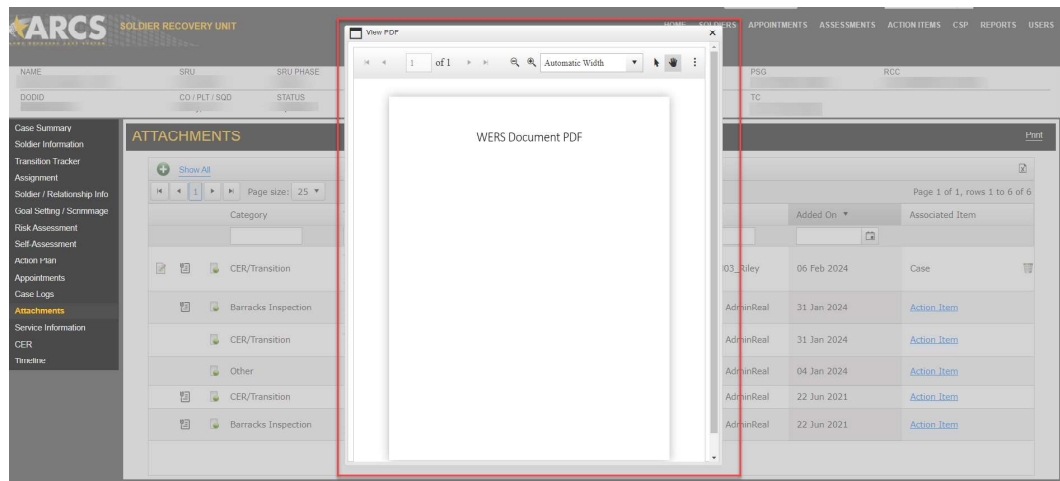
3. Click the **Close** hyperlink to close the window.

View PDF Attachment

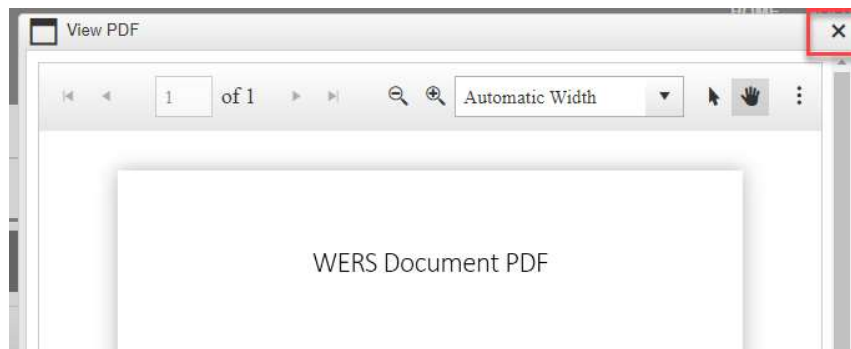
To view the PDF in a pop-up window:



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



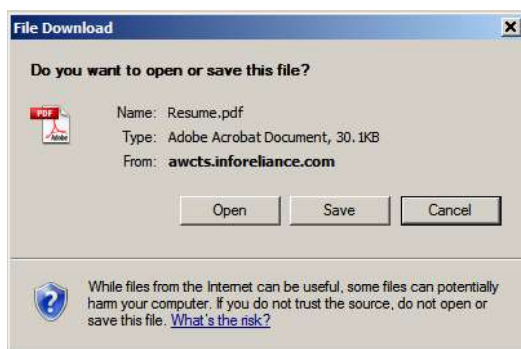
3. Select the X icon to close the window



Download Attachment

To download an attachment:

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

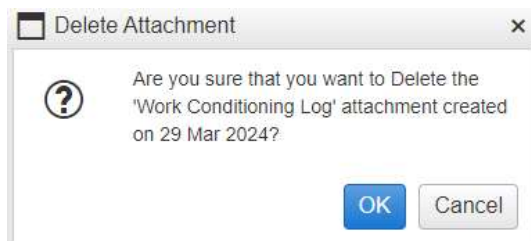


3. Click **Open** to open the attachment, **Save** to save the file to another location (e.g., hard drive), or **Cancel** to stop the download.

Archive Attachment

To archive 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.

NOTE: To permanently delete a file from a Soldier's case, please submit a ticket to the ARCS service desk.

Service Information

The Service Information screen has seven tabs:

Each of these tabs is read-only, and is populated from the authoritative source.

Personnel Tab

Use the Personnel tab to view Soldier personnel data from **IPPS-A**¹. Click on a hyperlink to view a different screen on the tab.

Personnel	Casualty	MODS	MEB	PDCAPS	ePEB	TRANSPROC	TSGU
Basic Personnel Data Military Service Data Awards / Assignments / Locations Action Data / Clearance / Insurance Occupation / Skills Education / Certifications							
Basic Personnel Data							
First Name: Ron				Middle Initial:			
Last Name: Arrington				Suffix:			
Rank: Major				Effective Date of Rank: 25 Nov 2008			
MPC: ENLISTED				Age: 42			
Gender: Male				Date of Birth: 08 Aug 1980			
Race: Asian, Black or African American				Religious Denomination:			
Ethnic Group Code:				DODID: 171044026			
Army Component (Current): ACTIVE ARMY				SSN: ***-**-4026			
Home of Record:				Country of Citizenship:			
Primary Occupation:				Primary Language:			
Physical Profile:				Physical Category:			
Physical Exam Date:							
Marital Status: Married				Marital Status Date: 20 Dec 1999			
Number of Dependent Adults: Not Available				Number of Dependent Children: Not Available			
Spouse Data							
State of Birth:				Country of Birth:			
Country of Citizenship:							
SSN:				Service:			
Component:				MPC:			
Assignment Considerations							

¹Integrated Personnel and Pay System - Army

Personnel Tab Hyperlinks

Name	Description
Basic Personnel Data	This screen displays Basic Personnel Data, Spouse Data, and Assignment Considerations sections.
Military Service Data	This screen displays Military Service Data and Military Duty Status sections.
Awards / Assignments/ Locations	This screen displays Awards, Assignments, Deployments, and Mobilizations sections.
Action Data / Clearance / Insurance	This screen displays Major Personnel Action Data; Major Personnel Flag Action Data; Security Clearance Data; and Survivor Benefit, Life Insurance, and Defense Enrollment Eligibility Reporting System (DEERS) Status Data sections.
Occupation / Skills	This screen displays the Montgomery GI Bill (MGIB) data, Occupational Data, Additional Skills, and Special Skills sections.
Education / Certifications	This screen contains the Education Levels, Degrees, Military Education, Military Courses, and Professional Certifications sections.

Casualty Tab

Use the Casualty tab to view the Defense Casualty Information Processing System (DCIPS) Casualty Data Summary.

Service Information				Print
Personnel	Casualty	WTU	MEB	PDCAPS
		ePEB	TRANSPROC	TSGLI
DCIPS Casualty Data Summary				
Incident	Date of Incident	Conflict Type	Operation Incident	
566045	12 Mar 2015			

Click on an **Incident Code** hyperlink to view casualty information.

MODS Tab

Use the MODS tab to view Soldier information from MODS, including Patient Information, Patient Record, Patient Status, Case Manager Information, Line of Duty Investigation

Information, UIC Data, Orders Information, Medical Information, and Gaining Information sections.

Service Information							
Personnel	Casualty	WTU	NEB	POCUPS	#PBB	TRANSPOC	TSGL
Soldier Data from MODS							
Patient Information							
Record Status: current				Patient Status: OFF INSTALLATION REMOTE(*50 MILES)			
Date Last Updated:				Mission: OPERATION IRAQI FREEDOM			
State:				Component:			
Rank: 1LT							
Patient Record							
Profile:							
Start Date: 29 Jul 2012				Convalescent Leave End Date:			
Clinical Start Date: 29 Jul 2012				Tricare Prime Remote: Y			
Injury Description:							
Patient Status							
Deployed to Theater: Y				Treated in Theater: N			
Wounded in Action: N				Reason Entered WTU: MEDVAC			
Projected Release from Active Duty:				Actual Release from Active Duty:			
Reason Released from Active Duty:							
Transferred to CBWTU: Y							
Case Manager Information							
Name: NCM1							
Telephone:				Email Address:			
Convalescent Leave: N				Convalescent Leave Start:			
Convalescent Leave Days:							
Line of Duty Investigation Information							
LOD Type: INFORMAL				LOD Determination: Y			
LOD Initiated Date: 7/29/2012 12:00:00 AM				LOD Completion Date: 4/23/2011 12:00:00 AM			
LOD Initiated By: MTF							
UIC Data							
Unit Type	Location Code	State	Country	UIC	Unit Command	Location	CBWTU Code
WALTER REED CD A	WALTER REED AMC	DC	US	W2P134	HC	WALTER REED AMC	Y
Orders Information							
Type	Start	End	EN#	Start	End		
Assigned	24 Jul 2011	31 Dec 2011			31 Dec 2011		
Medical Information							
MOB Days: 400				Med Care Status: current			
Number of Days on ADME:				Number of Days extended on ADME:			
Medical Condition:		Preexisting Condition:		Rank:			
No Records Found							
Gaining Information							
Gaining UIC:				Gaining Unit Design:			
Gaining Unit Command:				Gaining UIC Location:			
Gaining UIC State:				Gaining UIC Country:			
Gaining UIC CBWTU:							

MEB¹ Tab

Use the MEB tab to view MEB information, including MEB Soldier Status, Medical Actions, Physical Evaluation Board Liaison Officer (PEBLO) Actions, Unit / Soldier Actions, and Physical Evaluation Board sections.

Service Information		Print
Personnel	Casualty	WTU
MEB		
Medical Evaluation Board(MEB)		
MEB Soldier Status		
Deployed:	Assigned PEBLO:	
Conflict:	Information Last Updated:	
WTU:	Date Assigned to WTU:	
Medical Actions		
Date of Physician's Notification of MEB Action:	Physical Exam Completed:	
Consultation Required:	Consultation Dates:	
Date of MEB Physician Appointment:	Date Physician Dictated MEB Narrative Summary:	
PEBLO Actions		
Date of Initial PEBLO Counseling:	Date Signed MEB Returned to PEBLO:	
Date MEB w/ Signatures of Approving Authority Returned to PEBLO:	Date Patient Counseled on MEB:	
Date MEB Appeal Returned of PEBLO by MEB Approving Authority:	Date MEB Stopped / Pending Optimal Treatment:	
MEB Recommendation Appealed:	Date Appeal Filed:	
Unit / Soldier Actions		
Date Commander Notified of MEB Action:		
Physical Evaluation Board		
Date MFR Forwarded to PEB:		

PEB² Tab

Use the PEB tab to view PEB information, including Case Data, and Board Data sections.

¹Medical Evaluation Board

²Physical Evaluation Board

[Print](#)

Service Information

Personnel Casualty WTU MEB PDCAPS **ePEB** TRANSPROC TSGLI

Physical Disability Evaluation Board Data (PEB)

Case Data

Soldier Name: Cieloszyk, Gaston

File Status: Case Creation Date: 03 Feb 2011

MTF Name: Ft. Somewhere Case Status: Closed

Final Result: F Percentage: 10

Final Result Date: 03 Feb 2011 TDRL Re-Exam Date: 03 Feb 2011

Board Data

Board Date	Board Disposition	Disability %	Final Result	Result Date
01 Jan 2012	T	10	F	03 Feb 2011

Click on a **Board Date** hyperlink to view the PEB Details screen.

TRANSPROC¹ Tab

Use the TRANSPROC tab to view Military Personnel Transition Point Processing System (TRANSPROC) data.

[Print](#)

Service Information

Personnel Casualty WTU MEB PDCAPS ePEB **TRANSPROC** TSGLI

Component	Modify Date	Separation Submit Date	Separation Received	Separation Effective Date	Location	Disposition	Order Print Date
RESERVE	05 Sep 2000				WALTER REED		

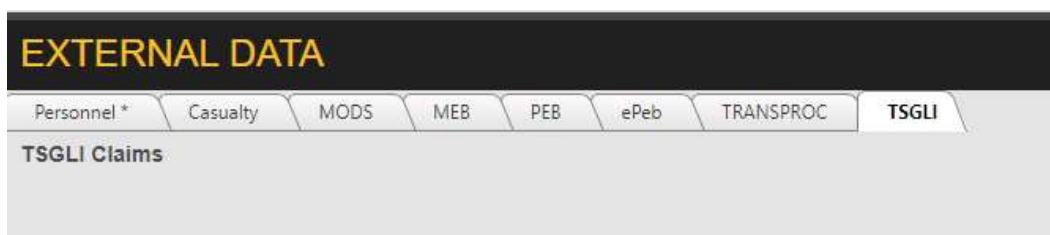
NOTE: TRANSPROC information dated later than 2014 is not available at this time.

TSGLI² Tab

Use the TSGLI tab to view Traumatic Servicemember's Group Life Insurance (TSGLI) claims data.

¹Military Personnel Transition Point Processing System

²Traumatic Servicemember's Group Life Insurance



NOTE: ARCS does not have an operational data interface with TSGLI at this time.

Career and Education Readiness (CER)

The CER page allows for the tracking of the Soldier's career and educational goals, challenges, and action items related to their transition.

NOTE: CER is not available until the [Phase One Goal Setting](#) is completed in the [Goal Setting / Scrimmage](#) section.

About Career and Education Readiness (CER)

The CER functionality in ARCS SRU supports the Career domain of the Recovery Care Plan (RCP). It provides consolidated views of each Soldier's progression through the CER program.

CER functionality includes:

- CER Summary
- Prep Activities (Employment Prep and OT Prep)
- Remain in the Army Work Assignment (RIAWA)
- Education & Training
- Internship
- Other Career (Apprenticeship and Entrepreneurship)
- Alternate Activity
- Exit Interview

Transition Coordinator Dashboard

The Transition Coordinator Dashboard displays all Soldiers assigned to the user in the TC role.

Name	PLT	Eligibility Status	Days Since Eligible	Participation Status	E2I	VR&E 1-on-1
VANBREDERODE, FAWN	2nd		38		Add	Add
HIGUERA, ADRIAN	2nd		15		Add	Add
PETRIE, PAUL	2nd		0		Add	
VEST, JORDAN	2nd		17			
WINFREE, JEFFREY	2nd		38		Add	Add
HOVEY, MATTHEW	2nd				Add	Add
RIDDLE, SHANNON	2nd					

Cases with any of the following conditions will display:

- [Eligibility Status](#) is Amber or Red
- Days Since Eligible
- [Participation Status](#) is Amber or Red
- VR&E 1-on-1 Counseling is not complete
- Education & Employment Initiative (E2I) Referral is not complete

The clicking on the Soldier name hyperlink will take the user to the CER page in the Soldier's case.

CER Eligibility and Participation

Icon	Definition	Eligibility Status	Participation Status
	Not Applicable	Phase One Goal Setting is not complete	- Phase One Goal Setting is not complete - Soldier is CER Ineligible (less than 75 days) - Soldier is Long Term Ineligible
	Requirement is complete	- Soldier is CER Eligible - Soldier is Ineligible (30 days or less) - M2 and CDR have entered eligibility information - Soldier is Long-Term Ineligible	Soldier is participating in an activity that is greater than 30 days from ending

Icon	Definition	Eligibility Status	Participation Status
	Proactive actions can be taken to remain compliant	- M2 and/or CDR eligibility is not yet determined and Phase One Goal Setting was completed within the last week - Soldier is Ineligible for greater than 30 days and less than or equal to 60 days (Not identified Long-Term Ineligible) Action: M2/C2 Update eligibility, change eligibility comments, or establish Long-Term Ineligibility	- Soldier is Pending Placement (expires after 30 days) - Soldier has an activity ending in less than or equal to 30 days Action: Establish follow-on CER activity

Icon	Definition	Eligibility Status	Participation Status
	The established requirement for compliance has passed. Action is required.	• M2 and/or CDR eligibility is not yet determined and Phase One Goal Setting was completed more than one week ago • Soldier is Ineligible for greater than 60 days Action: M2/C2 Update eligibility, change eligibility comments, or establish Long-Term Ineligibility	• Soldier is not participating in any activity • Completed CSP Job Placement Information is missing • Soldier is non-compliant with CER program Action: Establish CER activity or update CSP Job Placement for completed CSP activity

VR&E and E2I

Icon	Definition	VR&E 1-on-1	E2I Referral
Add	• Hyperlink text opens data entry pop-up • Cell background turns red when the case has been open 90 days or more with no data entry	• VR&E 1-on-1 Counseling dates are blank in Employment Prep	• Education & Employment Initiative (E2I) Referral activity in Employment Prep is blank
Pending	• Hyperlink text opens data entry pop-up • A new date can be chosen in the pop-up • Cell background turns red when the case has been open 90 days or more and the activity is not complete	• Start Date for VR&E 1-on-1 Counseling is today or later OR • End Date for VR&E 1-on-1 Counseling is after today	• Start Date for E2I Referral is today or later OR • End Date for E2I Referral is after today
	• Activity is complete	• The end date for VR&E One on One Counseling is today or earlier	• The end date for E2I is today or earlier

NOTE: VR&E and E2I pop up windows allow one date. This date will be entered into the Start and End Date fields on the employment Prep page.

CER Summary

The main page of the CER function displays a summary of the Soldier's CER activity.

The screenshot shows the 'CER' (Career Evaluation Report) Summary screen. The left sidebar contains navigation links: Case Summary, Soldier Information, Assignment, Soldier / Relationship Information, Goal Setting / Scrimmage, Risk Assessment, Self-Assessment, Action Plan, Appointments, Case Logs, Attachments, Service Information, CER, CTP Timeline, and Other Cases. The main content area has tabs for Summary, Prep Activity, RIAWA, Education & Training, Internship, Other Career, Alternate Activity, and Exit Interview. The 'Summary' tab is active, displaying 'Eligibility Status: Ineligible' and 'Participation Status: Not Participating'. Under 'Eligibility Status', there are bubbles for M2 and CDR, both currently grey (Unverified Eligibility). An 'Update Eligibility' button and a 'Check for Non-Compliance' checkbox are present. The 'Participation Status' section lists various activities with red 'X' icons indicating non-participation: RIAWA, Education and Training, Internship, Apprenticeship, Entrepreneurship, Alternate Activity, and Pending Placement. A 'Key' section on the right explains the icons: Eligible (green circle with 'E'), Ineligible (red circle with 'X'), Unverified Eligibility (grey circle), Eligible Participating (green circle with checkmark), Eligible / Non-participating (yellow circle), and Ineligible (red circle with 'X'). Below this is another 'Key' section for self-assessment categories: Not Assessed (grey circle), Low (green circle), Moderate-Low/Guarded (yellow circle), and Moderate/Elevated (red circle). At the bottom, there is a section for 'Associated Self-Assessment Categories' with a table showing categories like Education, Employment, and Work Plan, along with their current assessment and action items. The bottom of the screen shows a section for 'CAREER Challenges, Action Statements & Goals'.

The summary screen displays the Soldier's CER Eligibility Status, Participation Status, Associated Self-Assessment Categories, Challenges, Actions Statements & Goals, and Log Entries.

Eligibility Status

Eligibility is based on two decisions, Medical Management (M2) and the Commander (CDR). The status of the eligibility is show in the bubbles next to M2 and CDR under eligibility status.

This close-up shows the 'Eligibility Status: Eligible' section. It features two green bubbles with the letter 'E' next to the labels 'M2' and 'CDR', indicating that both Medical Management and the Commander have approved the Soldier's eligibility. Below these are an 'Update Eligibility' button and a 'Check for Non-Compliance' checkbox.

The eligibility keys show the status of the Soldier's CER. The top half of the Key shows the eligibility indicators and the bottom half shows the participation indicators.



Eligibility Status

Status	Description
Eligible	M2 and CDR have both determined the Soldier is Eligible to participate in CER activities.
Not Eligible	M2 or CDR (or both) have determined the Soldier is Not Eligible to participate in CER activities.
Unverified Eligibility	No eligibility determination has been recorded for the Soldier.
LTI (Long Term Ineligible)	Displays in the bubble as Not Eligible. Company and Battalion Commanders have both selected the <i>Long Term Ineligibility</i> check box indicating the Soldier will not be eligible for at least 90 days.

Update Eligibility

Eligibility cannot be determined for Soldiers in Evaluation or RM2 phases.

Eligibility for CER activity is based upon two distinct evaluations made by Medical Management (M2) and the CDR (SRU Commander).

- The M2 (documented by the NCM) evaluation must conclude that the Soldier is **medically, emotionally and physically ready to participate in CER activity while continuing medical treatment.**