Survivor Outreach Services (SOS) Coordinator User Guide

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Notice

This document was prepared on behalf of:

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1. Welcome

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

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

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

	Acronym	Definition
1	ACS	Army Community Service
2	SOS	Survivor Outreach Services
3	FMWRC	Family and Morale, Welfare and Recreation Command
4	CAC	Casualty Assistance Center
5	NOK	Next of Kin
6	DCIPS	Defense Civilian Intelligence Personnel System

2. Accessing the SOS Program

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

Figure 1 ACS Staff website

If you are not registered with the ACS Staff website, click the 

button to go to the **Registration** screen and click the **Click here to register now** link.

Figure 2 Registration now

Next, you will need to fill out the registration form:

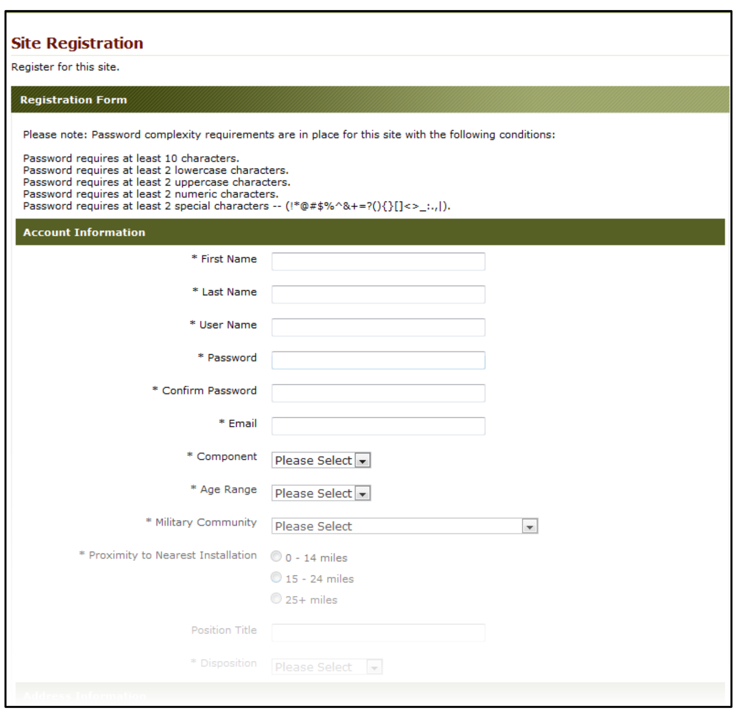


Figure 3 Site registration page

To enter the ACS Staff site, you will need to log in.

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

Or

2) Log in with your **Common Access Card** (CAC) by clicking the CAC Login button. You will need to have your CAC authenticated first.

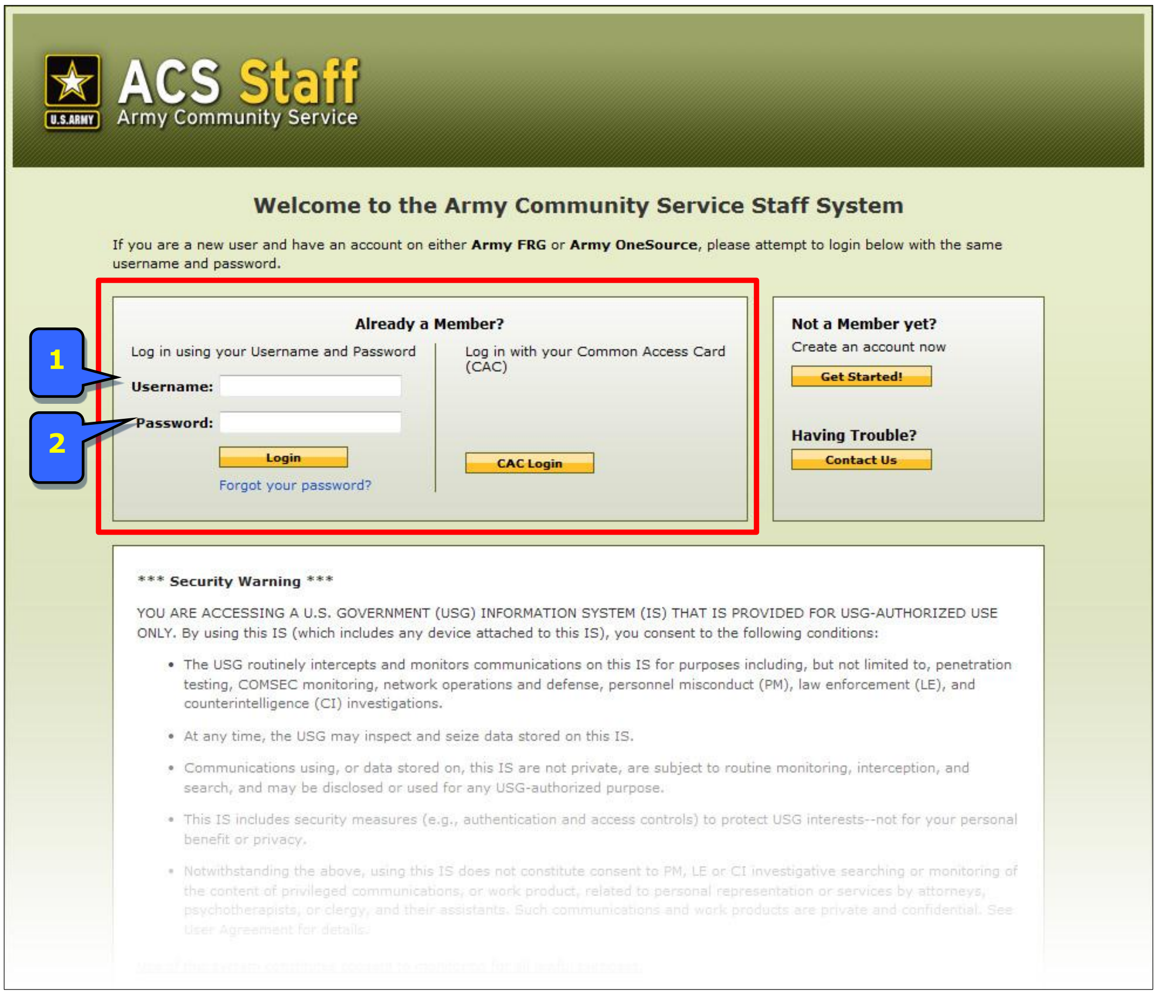


Figure 4 Logging in the ACS Staff website

The ACS Staff homepage is displayed:

Figure 5 ACS Staff homepage

From the left navigation bar, on the ACS Staff homepage, click the 

button to access the **Survivor Outreach Services** application.

3. SOS Features

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

Figure 6 SOS program dashboard

The following appears on the SOS homepage:

Dashboard Item		Description
1	**Personal Information**	The SOS program displays your current garrison, your name, and today's date.
2	**Search/ Advance Search**	**Search** for **Survivors Cases** by **Last Name** or use the **Advance Search** to filter your search results with additional fields like Soldier Last Name, NOK CAC, Case Status, and more.

3	**Clients**	The **Clients** tab is the default tab that displays when you enter the SOS program. The Clients tab displays any cases which are currently assigned to you, both new and ongoing.
4	**Follow Up**	The Follow Up tab allows you to view cases flagged for follow up. You are able to track additional meetings, calls, and other services related to your cases.
5	**Create Case**	The **Create Case** tab allows you to enter a new case into the SOS.
6	**Newly Assigned Clients**	**Newly Assigned Clients** displays new cases that have been assigned to the SOS Coordinator Staff.
7	**Assigned Clients**	**Assigned Clients** displays ongoing active cases.

3.1 Clients

The **Clients** tab is the default tab. To access cases click the 

tab. The **Clients** dashboard will display **new** and **currently assigned** cases sorted alphabetically by survivor last name.

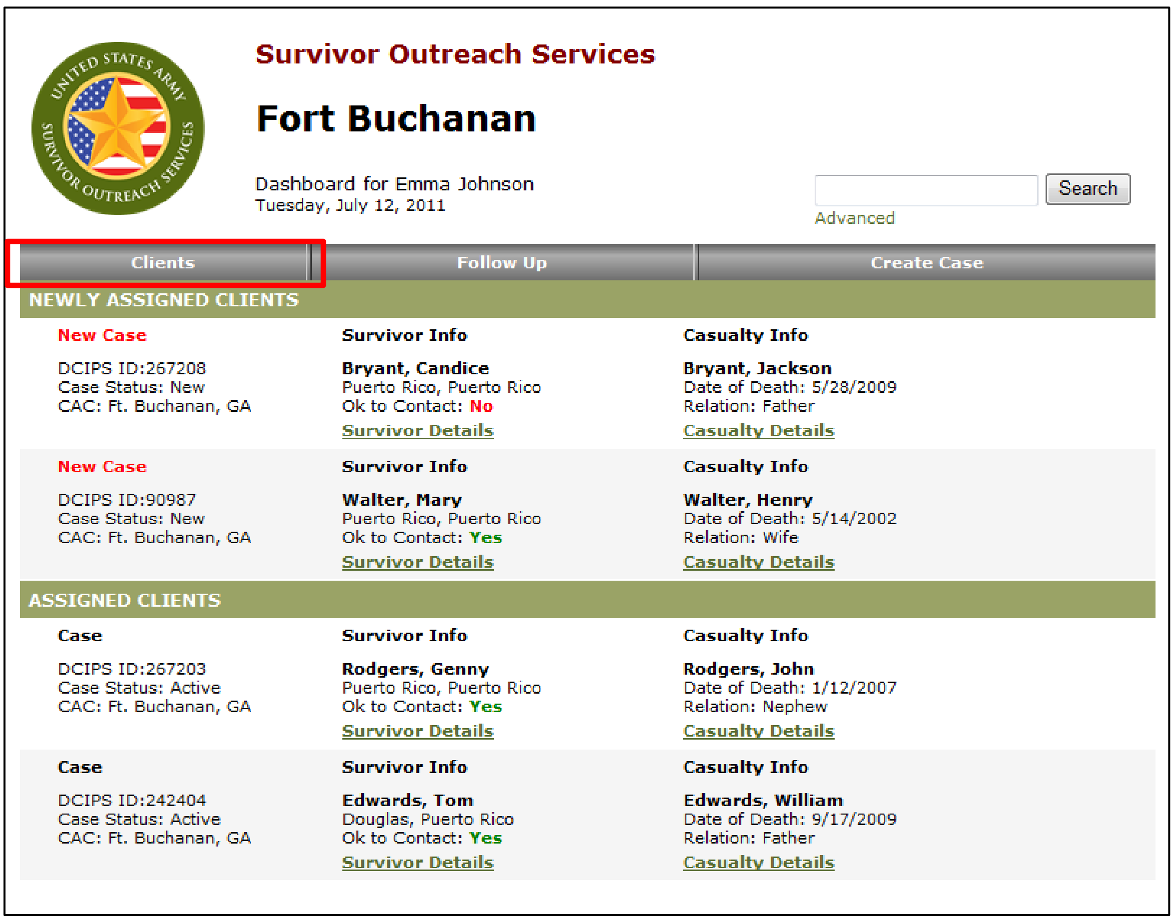


Figure 7 Clients tab view

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

3.2 Newly Assigned Clients

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

3.2.1 View Survivor Record

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

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

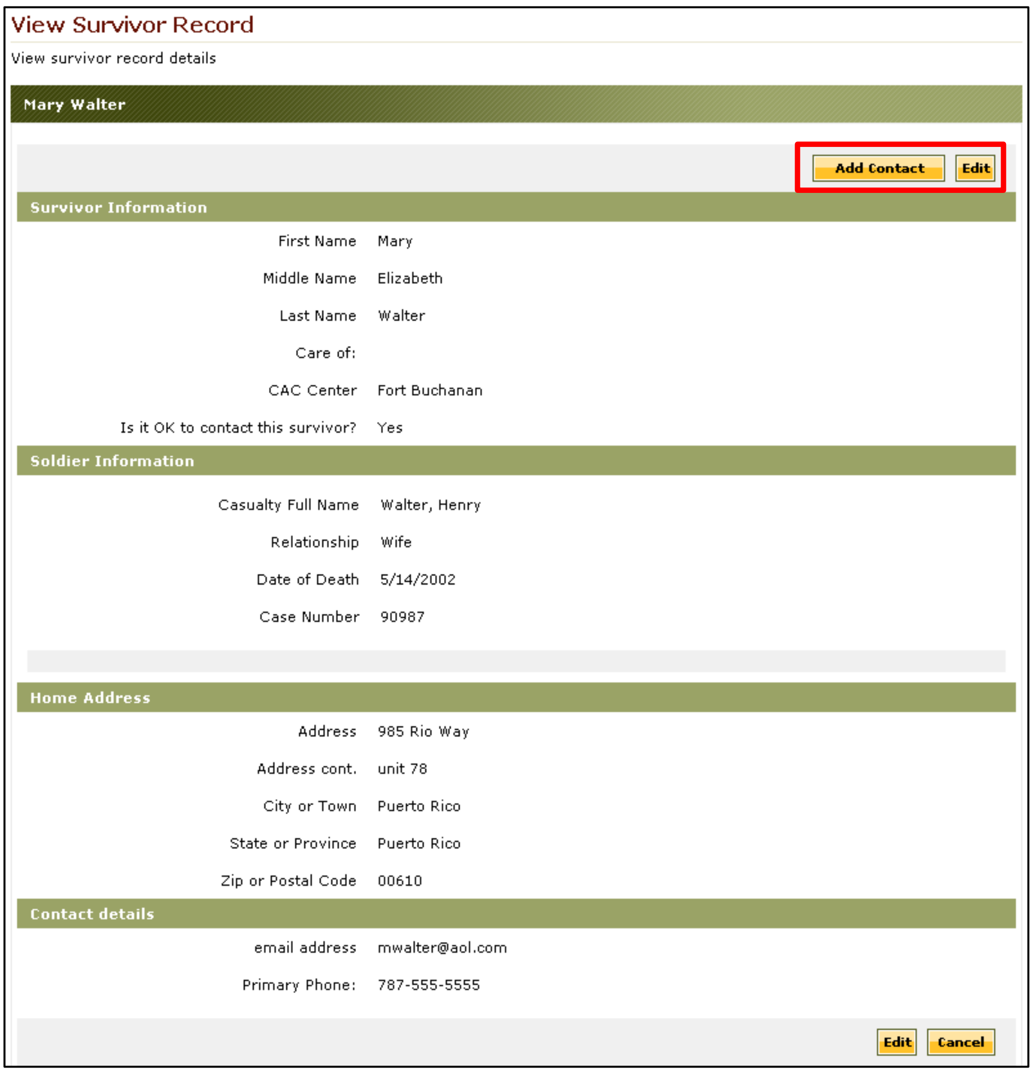


Figure 8 Survivor record view

3.2.2 Add Contact

To add a new contact on a survivor case record complete the following steps:

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

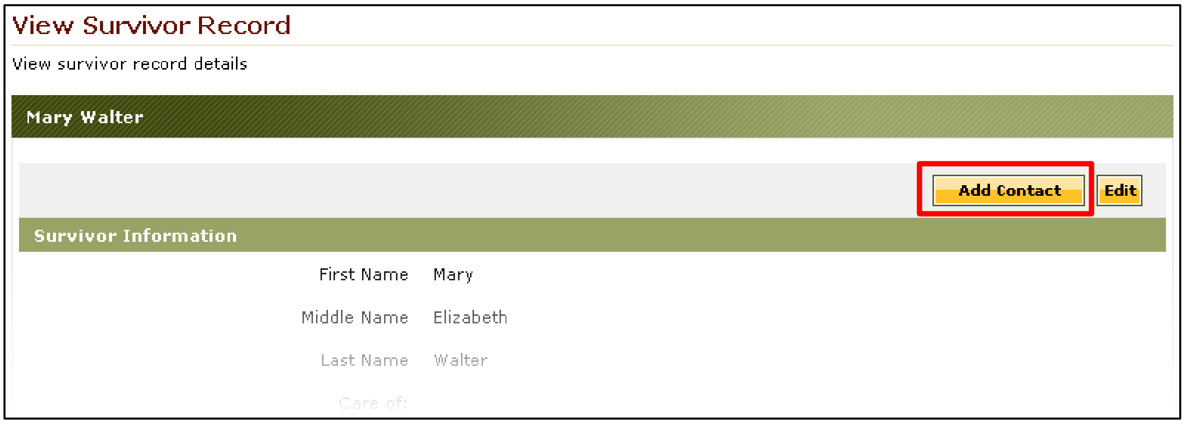


Figure 9 Selecting the Add Contact button

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

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

The following is a description of the **Contact Details** page for **Add Contact**.

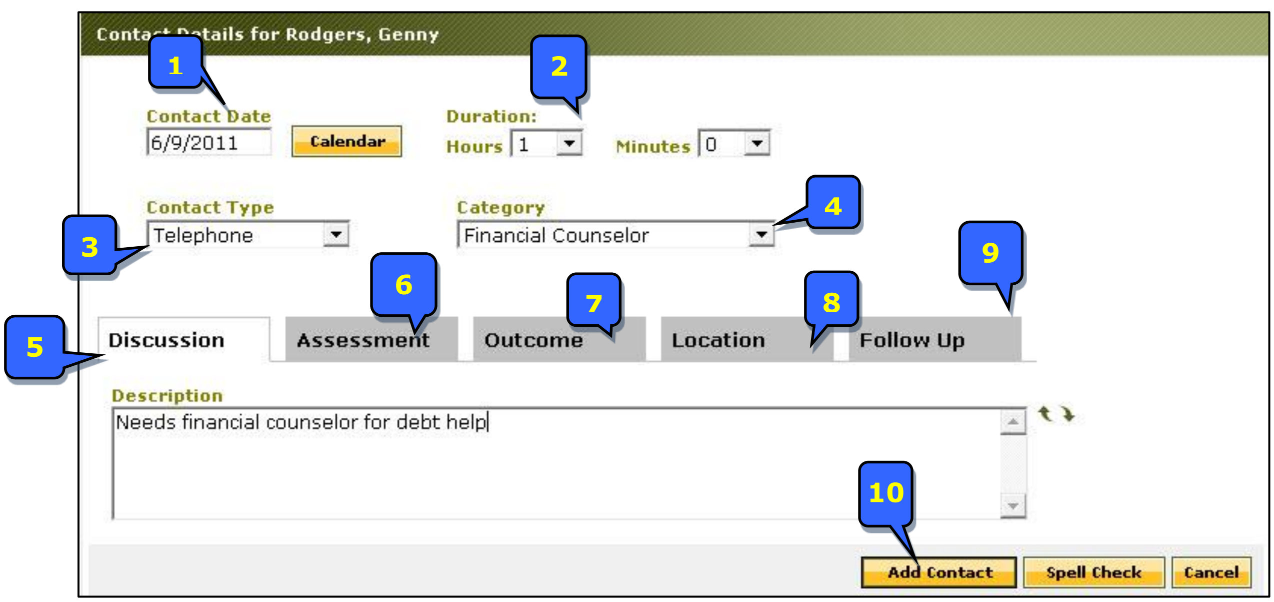
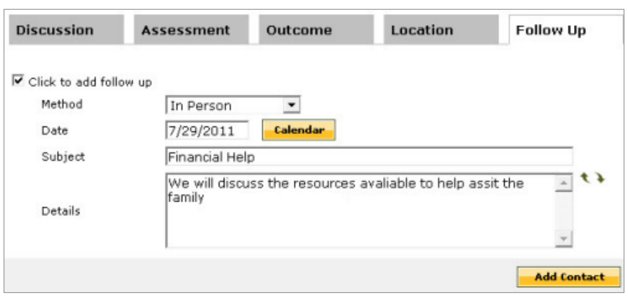


Figure 10 Contact details for client record

Contact Details Option		Description
1	**Contact Date**	Enter the date the contact took place. Manually enter the date or click the Calendar button to open the calendar and select a date.
2	**Duration**	Use the dropdowns to enter the length of time of the contact. Enter in hours and minutes.
3	**Contact Type** Please Select Please Select CNO/CAO Conference Call Email Facebook In Person Regular Mail SOS Training Telephone Text Message Webinars / Other	How did support coordinator contact the client? Use the dropdown menu to select an option from the provided list. Options include: Email, In Person, Regular Mail, SOS Training and more.
4	**Category** Please Select Please Select Army One Source Benefits Counseling Burial Info/Expenses/Markers Child Care Coordination Death Gratuity DEERS/RAPIDS/ID Cards Dep & Indemnity Comp Education Benefits (Federal) Financial Counseling Financial Counselor Grief Process Counseling MFLC / Psychological Health Military Chaplains Military One Source My Army Benefits My Army Life Too Obtaining Military Records SGLI / TSGLI / VGLI / FSGLI Social Security State Benefits Survivor Benefit Plan TAPS Tricare / Health Insurance VA Home Loan VA Services	What was the category of the contact? Use the dropdown menu to select the reason for the contact with the client. Options include: Benefits Counseling, Financial Counseling, Military Chaplains and more.

5	**Discussion**	Use the **Discussion** tab to record the details of the conversation in the text box provided.
6	**Assessment**	Use the **Assessment** tab to record the evaluation of the individuals need during the contact.
7	**Outcome**	Use the **Outcome** tab to record the conclusion(s) of the contact session with the client.
8	**Location** 	Use the **Location** tab to record the place of the meeting. If the contact of the meeting was offsite use the **Off-Site Location** feature to enter specific location.
9	**Follow Up** 	Use the **Follow Up** tab to record notes or tasks needed to perform or follow up with the client. Set the preferred method of future contact, date, subject, and details of the follow up. Click on **Add Contact** when the **Follow Up** is complete. The follow up will be accessible from the SOS. Click on the **Follow Up** tab to view.
10		To save the **Contact Details** click on the **Add Contact** button.

3.3 Case Follow Up

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

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

To view the details of a Follow Up:

1. Locate the **Survivor** name to follow up with.
2. Under the **Subject** column, locate the subject name.
3. Click on the subject name link under the **Subject** column.

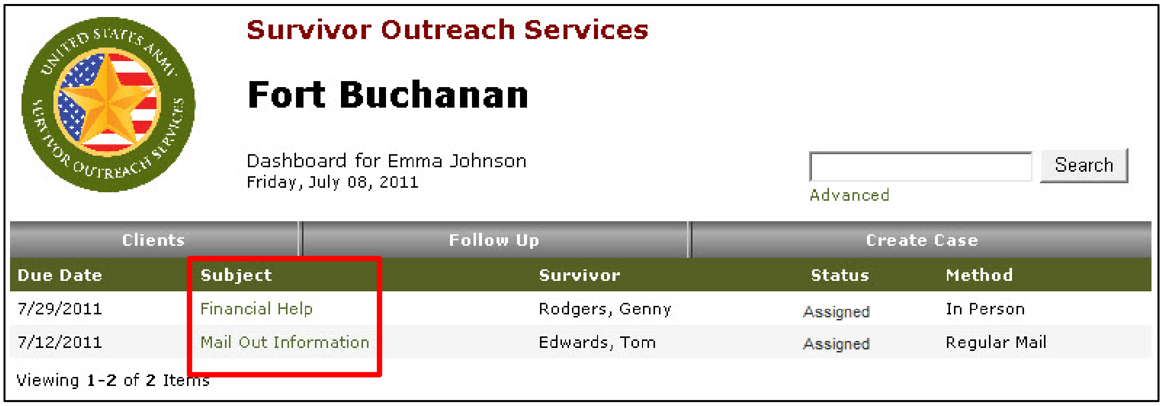


Figure 11 Follow up dashboard

4. The **Follow Up Item** page will open.
5. Add final notes and changes to the **Details** section.
6. Click the **Create Extended Contact** button to complete the follow up.

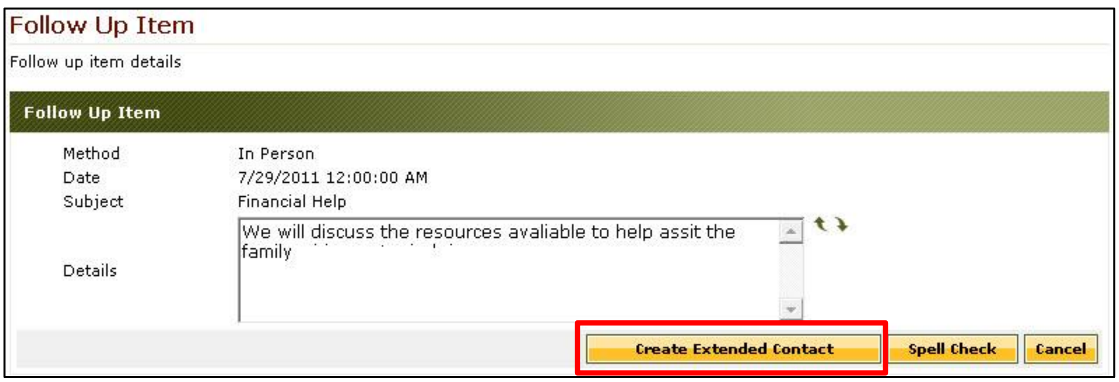


Figure 12 Follow Up item page

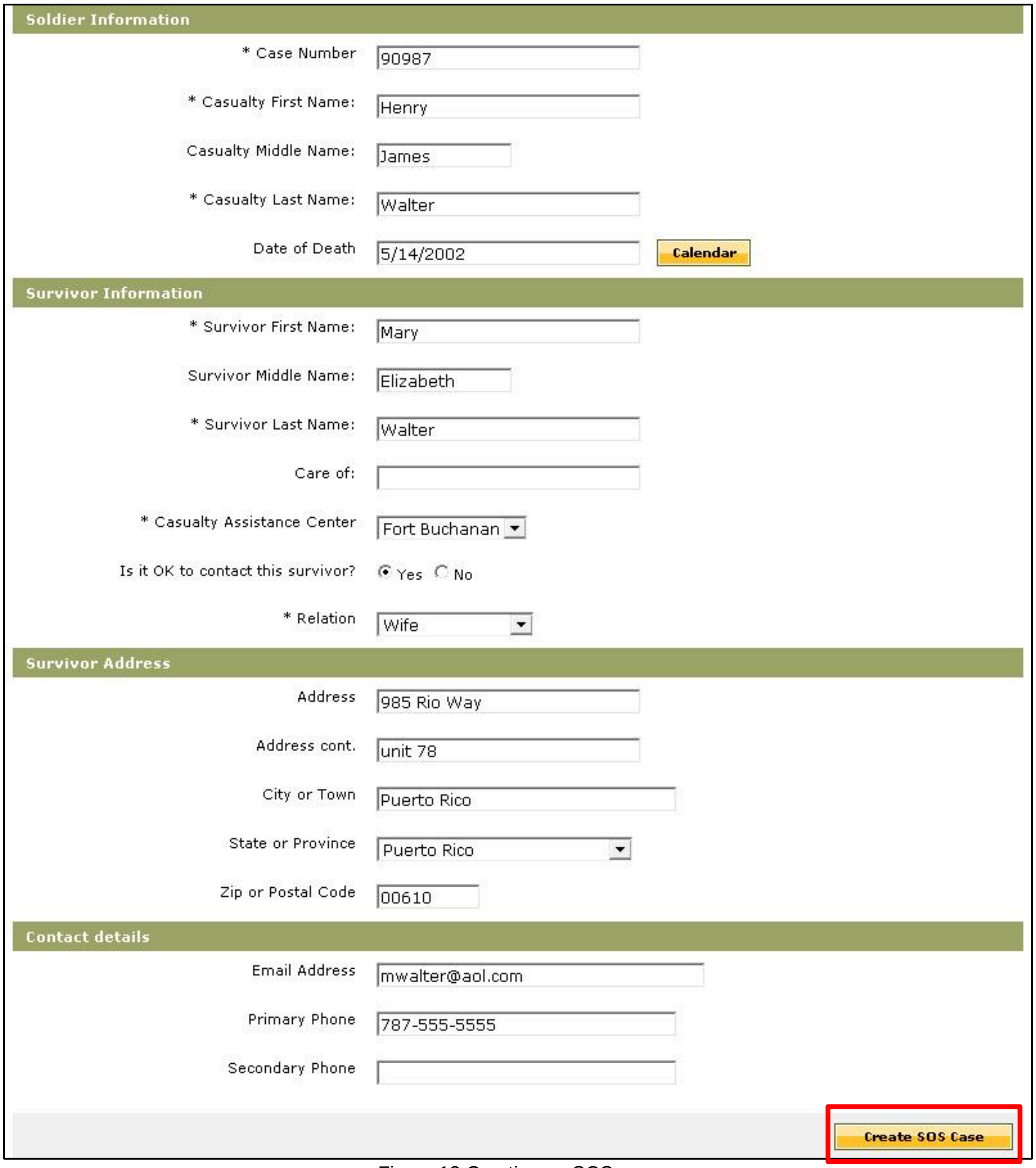
3.4 Creating a New Case

To enter in a new case complete the following steps:

1. Click the 

 tab.
2. When the **Create Case** window opens complete all required fields. Required fields are indicated with a **"*"** symbol next to the field name.
3. Fill in availabe case information by using the text boxes and dropdown menus.
4. Click the 

 to save the case to the system.



Soldier Information

* Case Number: 90987
* Casualty First Name: Henry
Casualty Middle Name: James
* Casualty Last Name: Walter
Date of Death: 5/14/2002 [Calendar]

Survivor Information

* Survivor First Name: Mary
Survivor Middle Name: Elizabeth
* Survivor Last Name: Walter
Care of:
* Casualty Assistance Center: Fort Buchanan
Is it OK to contact this survivor? (•) Yes ( ) No
* Relation: Wife

Survivor Address

Address: 985 Rio Way
Address cont.: unit 78
City or Town: Puerto Rico
State or Province: Puerto Rico
Zip or Postal Code: 00610

Contact details

Email Address: mwalter@aol.com
Primary Phone: 787-555-5555
Secondary Phone:

[Create SOS Case]

Figure 13 Creating an SOS case

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

3.4.1 Edit a Survivor Record

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

1. From the SOS dashboard click on the **Clients** tab.
2. Locate the case and **Survivor Info**.

3. Click on the **Survivor Details** link to display the **View Survivor Record** page.
4. Click the Edit button.
5. Update the information and click **Save Survivor** to save the record.

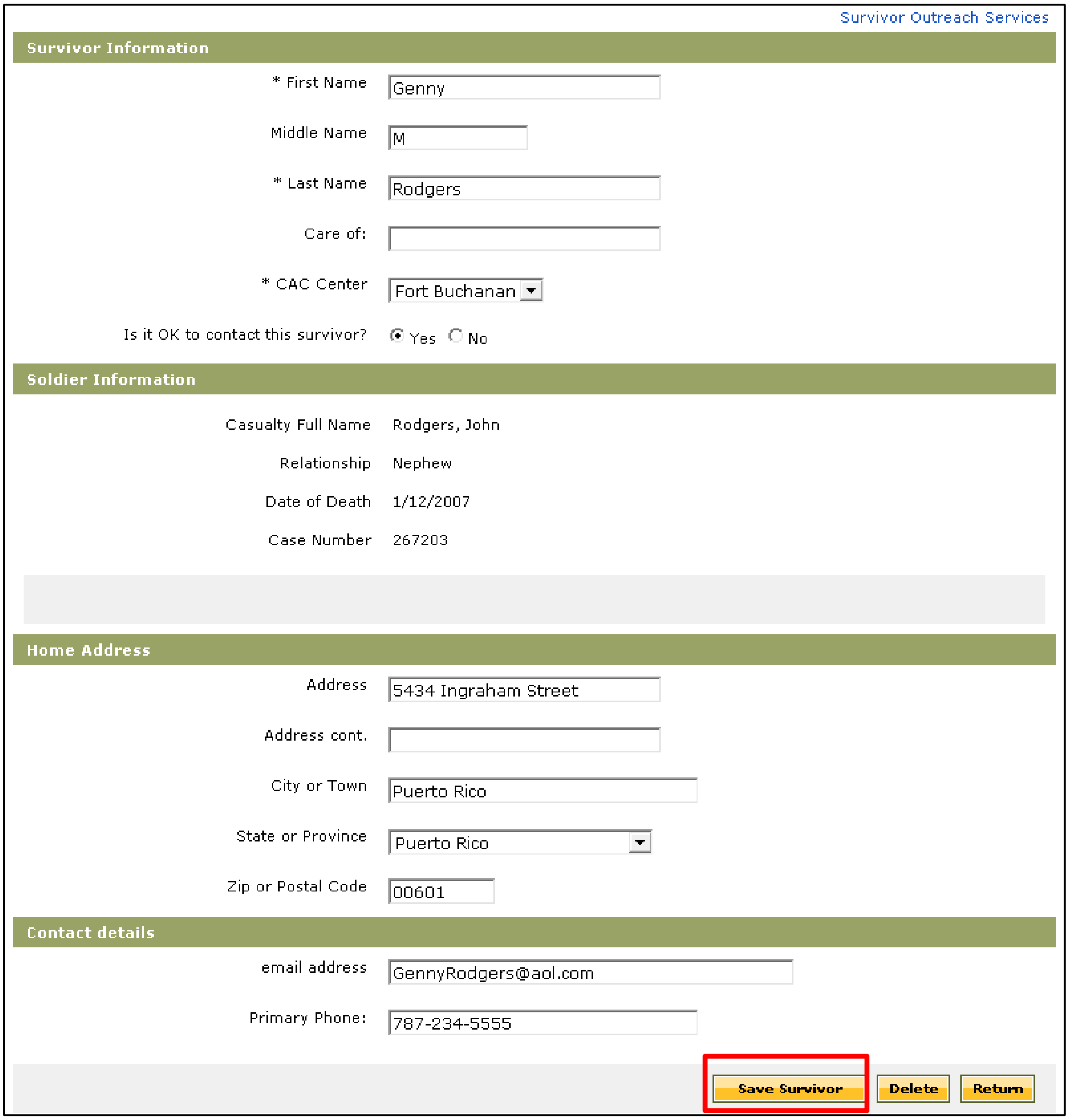


Figure 14 Editing a survivor

3.4.2 Edit a Casualty Record

The **Update Casualty Record** information includes the Case Number, First Name, Middle Name, Last Name, and Date of Death. It also includes Military Information and Family Members linked to the casualty.

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

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

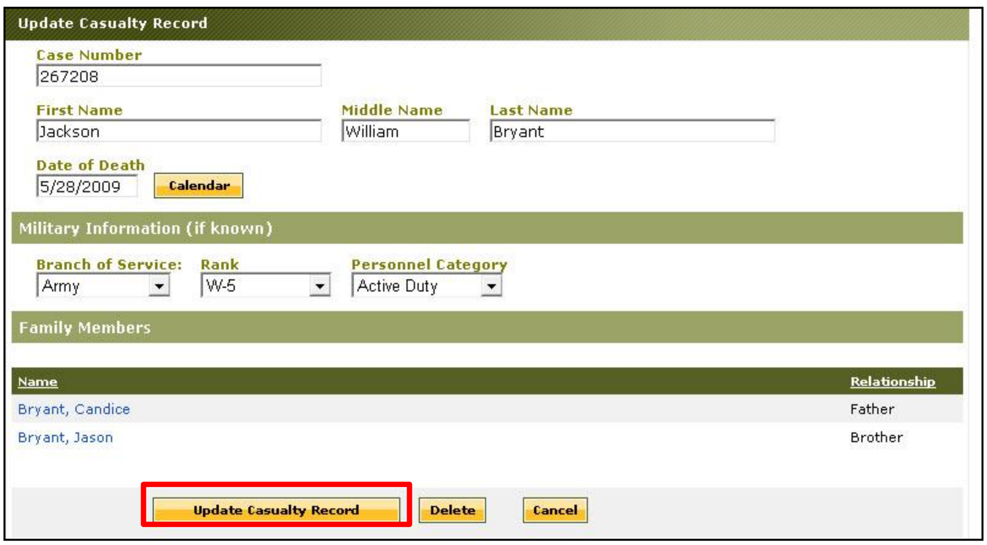


Figure 15 Updating a causality record

3.5 Search and Advance Search

3.5.1 Search

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

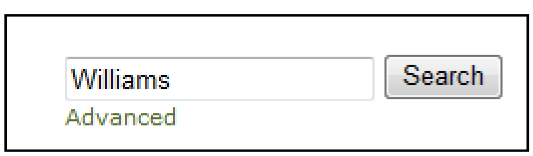


Figure 16 Last name search

3.5.2 Advance Search

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

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

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

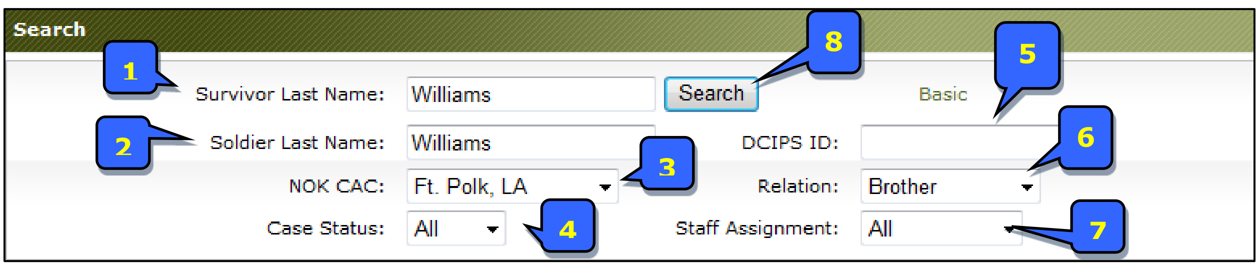
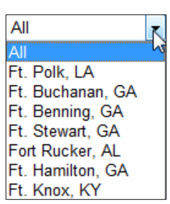
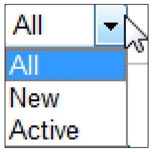
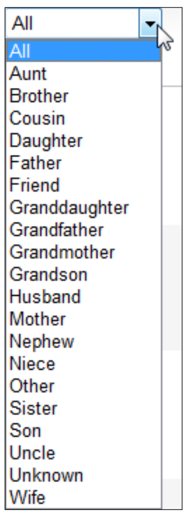
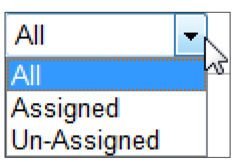
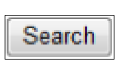


Figure 17 Advance search screen

Advanced Search Details:

	Advanced Search Filters	Description
1	**Survivor Last Name**	Use the Survivor Last Name field to search for a Survivor case by last name.
2	**Soldier Last Name**	Use the Soldier Last Name field to search for a Casualty Solider case by last name.
3	**NOK CAC**  	Use the NOK CAC dropdown menu to search for a specific CAC location or garrison and the records associated with it. **Note:** Depending on your SOS access level you will be restricted to the CAC locations or garrisons available in the dropdown list.
4	**Case Status**	Use the **Case Status** dropdown menu to filter your case search

	Advanced Search Filters	Description
		results by All, New, or Active status.
5	**Case ID**	Use the **Case ID** or the **DCIPS ID** field to search by case number.
6	**Relation** 	Use the **Relation** dropdown menu to filter search results by relationship to the Casualty Soldier.
7	**Staff Assignment** 	Use the **Staff Assignment** to filter case search results by All, Assigned, or Un-Assigned status.
8		Click the **Search** button to perform the search.

4. For Additional Assistance

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

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

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

Figure 18 ACS Staff feedback link

You can also access the Feedback screen by clicking on the 

button in the top right of the ACS Staff Homepage:

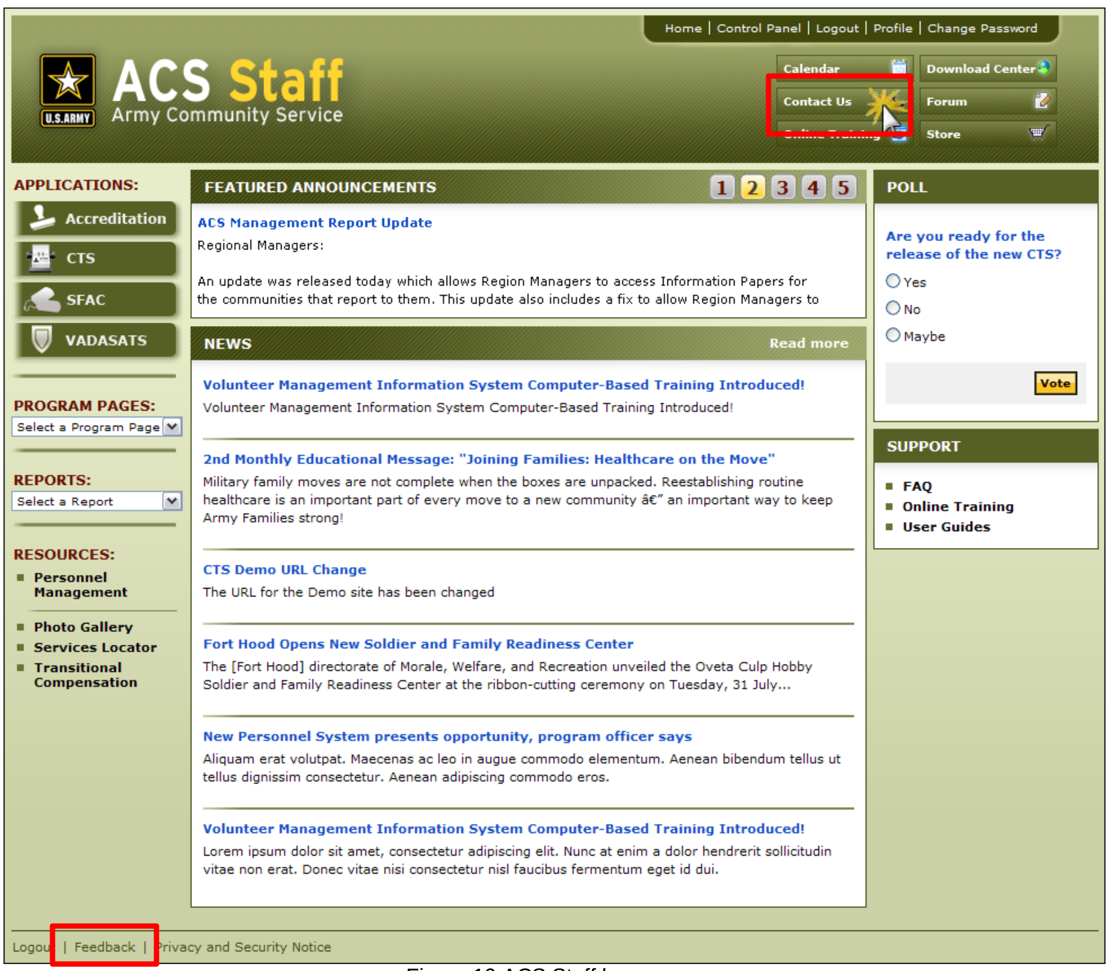


Figure 19 ACS Staff homepage