# Case Management System (CMS) Resource Guide

Human Resources (HR) Professionals

Supervisors of Military Service Members

October 2011

# About this Guide

This guide describes the Case Management System (CMS), provides step-by-step instructions for use and answers questions you may have.

## Conventions Used in this Guide

| Convention | Meaning |
|---|---|
| ALL CAPITALS | Acronyms |
| **Bold** | • Key names on the keyboard<br>• Buttons or hyperlinks on a CMS page |
| ⓘ | A note or tip that helps you make better use of the CMS |

## Guide Organization

The guide contains the following sections:

- Getting Started—gives details on accessing the CMS
- CMS Home Page—explains the functions available on the CMS home page
- My Staff's Active Deployment Case—provides instructions on the functions related to viewing cases
- User Profile Activity Log—explains the user profiles activity log
- Quick Links—describes the links
- Tempo—describes the real-time collaboration tool and provides instructions for use

## Technical Support

Please contact the *VA for Vets* help desk at 1-855-824-8387, option 3.

## Acronyms

| | |
|---|---|
| CMS | Case Management System |
| HR | Human Resources |
| VA | Veterans Affairs |
| *VA for Vets* | Veterans Affairs for Veterans |
| VESO | Veterans Employment Services Office |
| Vet Reps | Veterans Representatives |

# Contents

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## Getting Started

The Case Management System (CMS) is software designed to manage deployment cases and issues received by *VA for Vet* Coaches and/or Veteran Representatives (Vet Rep) from Department of Veterans Affairs (VA) employees.

A deployment case involves a collection of activities or tasks that need to be completed for each phase in the deployment lifecycle by the Military Service Member and his or her supervisor and Human Resources (HR) professional. The CMS lists the activities or tasks on a checklist.

An issue is everything else not associated with a case, such as a question about the *VA for Vets* website, directions on using the *VA for Vets* Career Center and so forth. Issues have three tiers. Tier 1 issues are those that can be resolved by a Vet Rep and/or Coach in fewer than 10 minutes. Tier 2 issues are those that can be resolved by a Coach, which may require further research. Tier 3 issues are those that can only be resolved by the Veterans Employment Services Office (VESO).

## *VA for Vets* Account

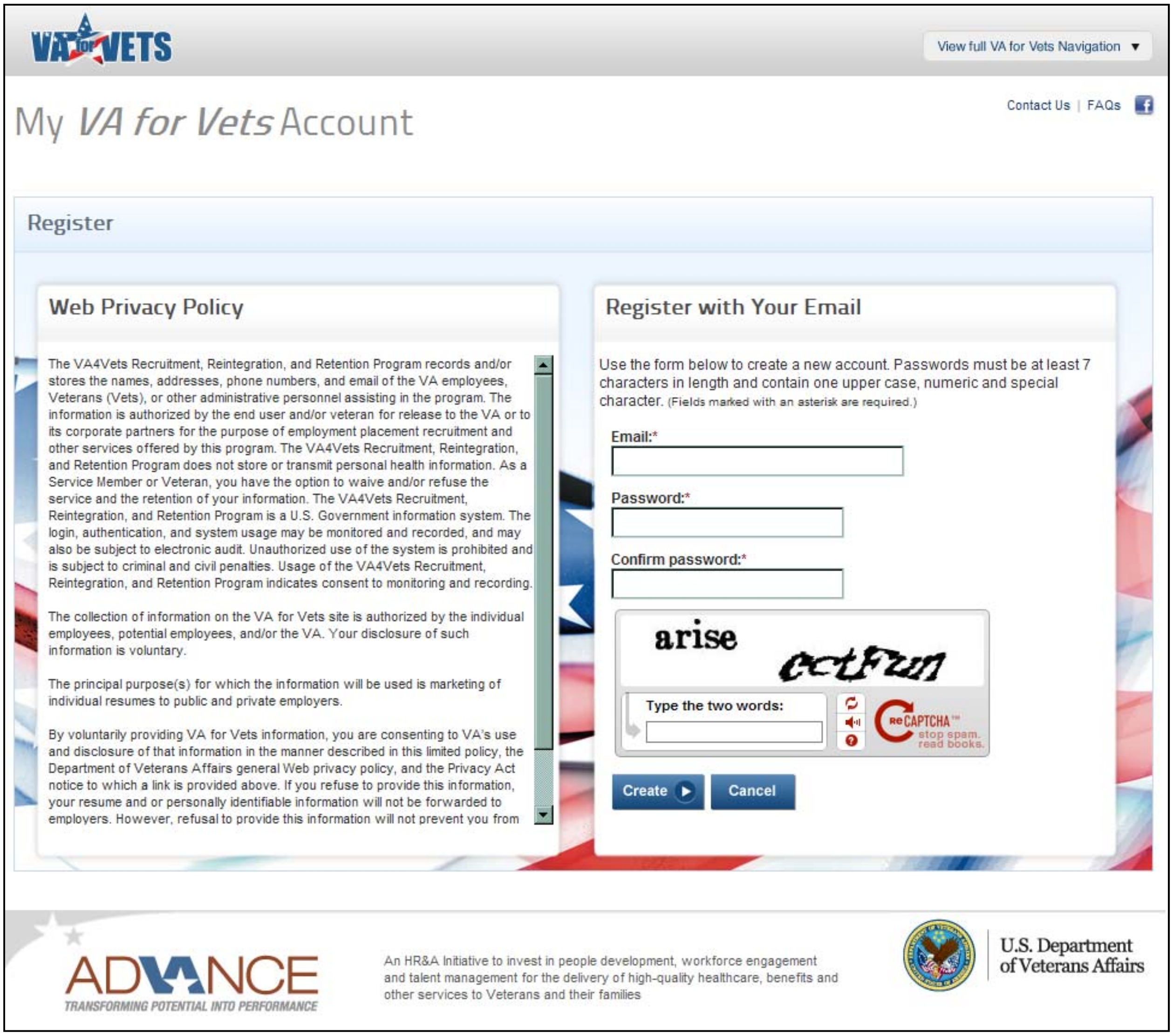
A *VA for Vets* account gives you access to the CMS and to the following features of the *VA for Vets* Career Center:

- Build and store resumes
- Save job searches
- Receive new job match alerts

### Registering for an Account

1. Open your web browser.
2. In the Address bar, enter http://VAforVets.VA.gov. This takes you to the *VA for Vets* home page.


3. Select **Register**. This takes you to My *VA for Vets* Account Register page.




4. In the Email field, enter <your email>.
5. In the Password field, enter <your password>.

   ⓘ Passwords must be a minimum of seven characters in length and contain at least one upper case letter, one numeral, and one special character.

6. In the Confirm password field, enter <your password>.
7. In the Type the two words field, enter the two words that are above the field.
8. Select **Create**. This takes you to My *VA for Vets* Account Profile page.

   ⓘ Selecting **Cancel** takes you back to the *VA for Vets* home page.


9. In the First name field, enter <your first name>.
10. In the Last name field, enter <your last name>.

| If… | Then… |
|---|---|
| You are a VA employee | Check the box. |
| You are not a VA employee | Go to step 13. (See next page.) |

11. In the EIN field, enter <your employee identification number>.
12. Use the drop-down lists to enter your day of birth.

13. Select **Save**. A confirmation message appears that your *VA for Vets* account was successfully created.

## Accessing the CMS

1. Open your web browser.
2. In the Address bar, enter https://mycase.vaforvets.va.gov. This takes you to the Log On page.

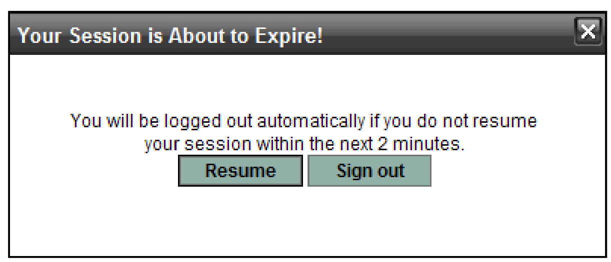
   ⓘ For optimal viewing of the CMS, use Internet Explorer 7, 8, 9 or Firefox 3.5, 3.6 or 4.0.

## Logging In


1. In the Username field, enter <your username>.
2. In the Password field, enter <your password>.
3. Select **Sign In**. This takes you to the CMS home page. See the CMS home page section of this guide for more information.

   ⓘ After three unsuccessful attempts to log on, the CMS automatically locks you out. You will have to contact the VA for Vets help desk at 1-855-824-8387, option 3, to get the account unlocked.

   ⓘ After 30 minutes, the CMS automatically logs you off. Two minutes prior to being automatically logged off, a dialog box appears asking if you want to resume or sign out. If you do not make a selection within 2 minutes, you will be automatically logged off.




## Logging Off


1. From the CMS toolbar, select **Sign Out**. This logs you off the CMS.

## Moving Around in the CMS

You can move from item to item (buttons, fields, or menu options) on the screen by using the:

- Mouse or
- Keyboard.

### Keyboard Shortcuts

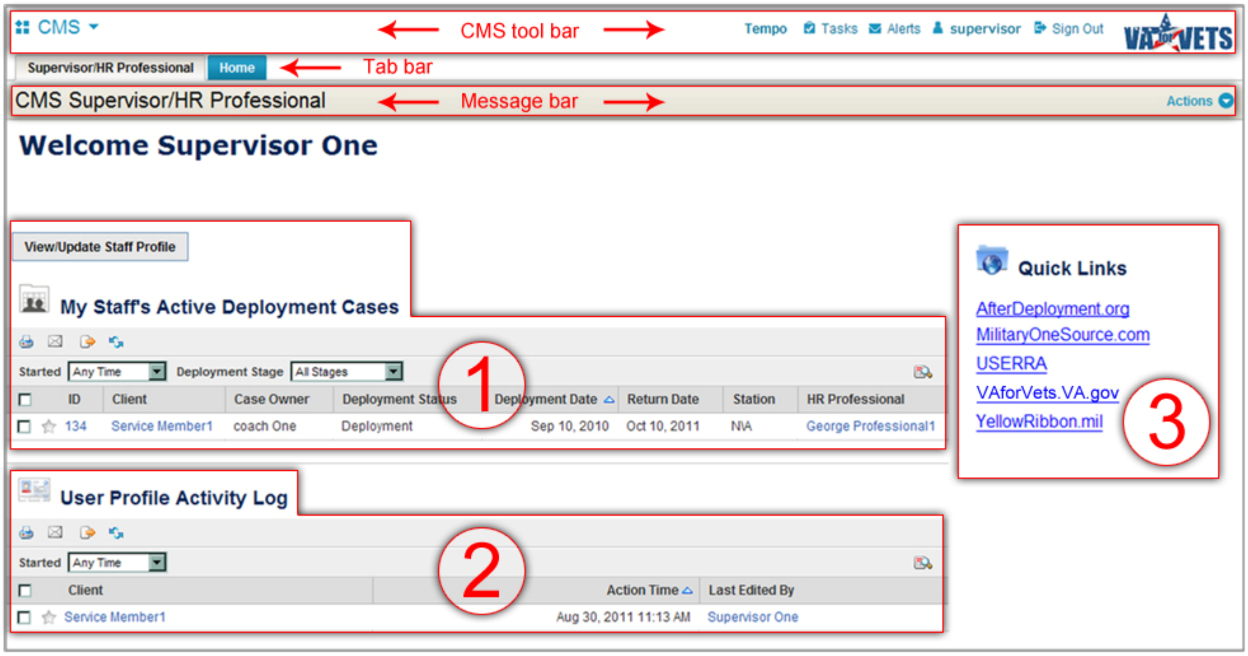
| To | Press |
|---|---|
| Go to the next field or button | **Tab** |
| Go to the previous field or button | **Shift Tab** |
| Activate a selected button | **Enter** |
| Activate a drop-down list in a field that has been selected | **F3** |
| Go down an item within a drop-down list | **Down directional arrow** |
| Go up an item within a drop-down list | **Up directional arrow** |
| Delete a character within a field | **Backspace** |
| Add a character space within a field | **Spacebar** |

ⓘ Do not use the web browser's Forward or Back buttons to navigate in the CMS.

## CMS Home Page

The CMS home page has a tool bar, a tab bar, a message bar and three distant workspaces:

1. My Staff's Active Deployment Cases
2. User Profile Activity Log
3. Quick Links



## CMS Tool Bar

The CMS toolbar has one drop-down menu and five links.

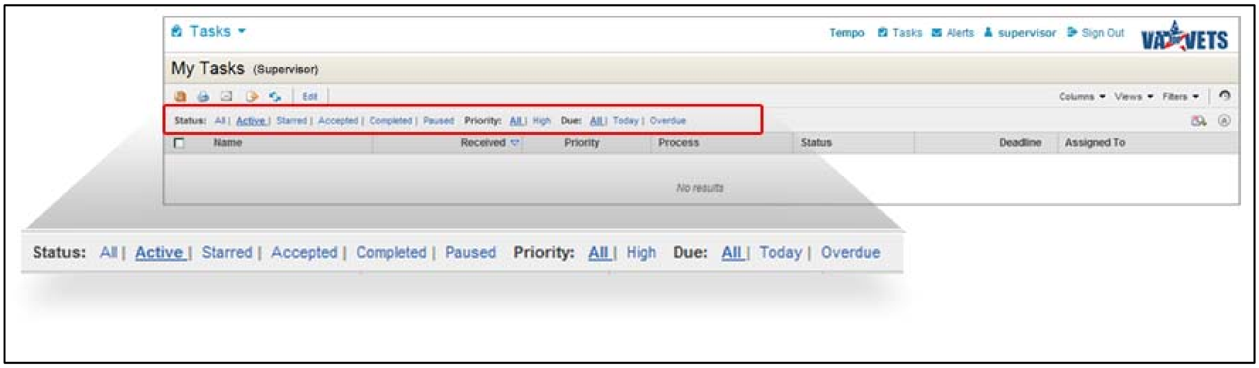

| From the drop-down menu, select . . . | To |
|---|---|
| CMS | Go to the CMS home page |
| Tasks | Go to the My Tasks page |
| Alerts | Go to the My Alert page |

| Select . . . | To |
|---|---|
| Tempo | Open a new web browser window with Tempo displayed<br>(See Tempo section of this guide for more information.) |
| Tasks | Go to the My Tasks page<br>(If there is a number in parentheses to the right of Tasks, this indicates the amount of tasks you have on the My Tasks page.) |
| Alerts | Go to the My Alerts page<br>(If there is a number in parentheses to the right of Alerts, this indicates the amount of alerts you have on the My Alerts page.) |
| Your name | Update your preferences |
| Sign Out | Log off CMS |

## My Tasks Page

The My Tasks page lists your tasks, where you may:

- Filter by a Status, Priority or Due value
- Sort by a column heading value (Name, Received, Priority, Process, Status, Deadline or Assigned to) by selecting that column heading value




You may also: 


- Save a copy of your task list to your computer
- Print your task list
- Email your task list
- Export the list to open in MS Excel or save as an MS Excel file
- Refresh your task list
- Edit your report options allows you to customize the display of your task list
  ⓘ Selecting **Edit** opens the *Report Options* dialog box. Complete the fields on each tab within the dialog box, then select **Save**.

## My Alerts Page

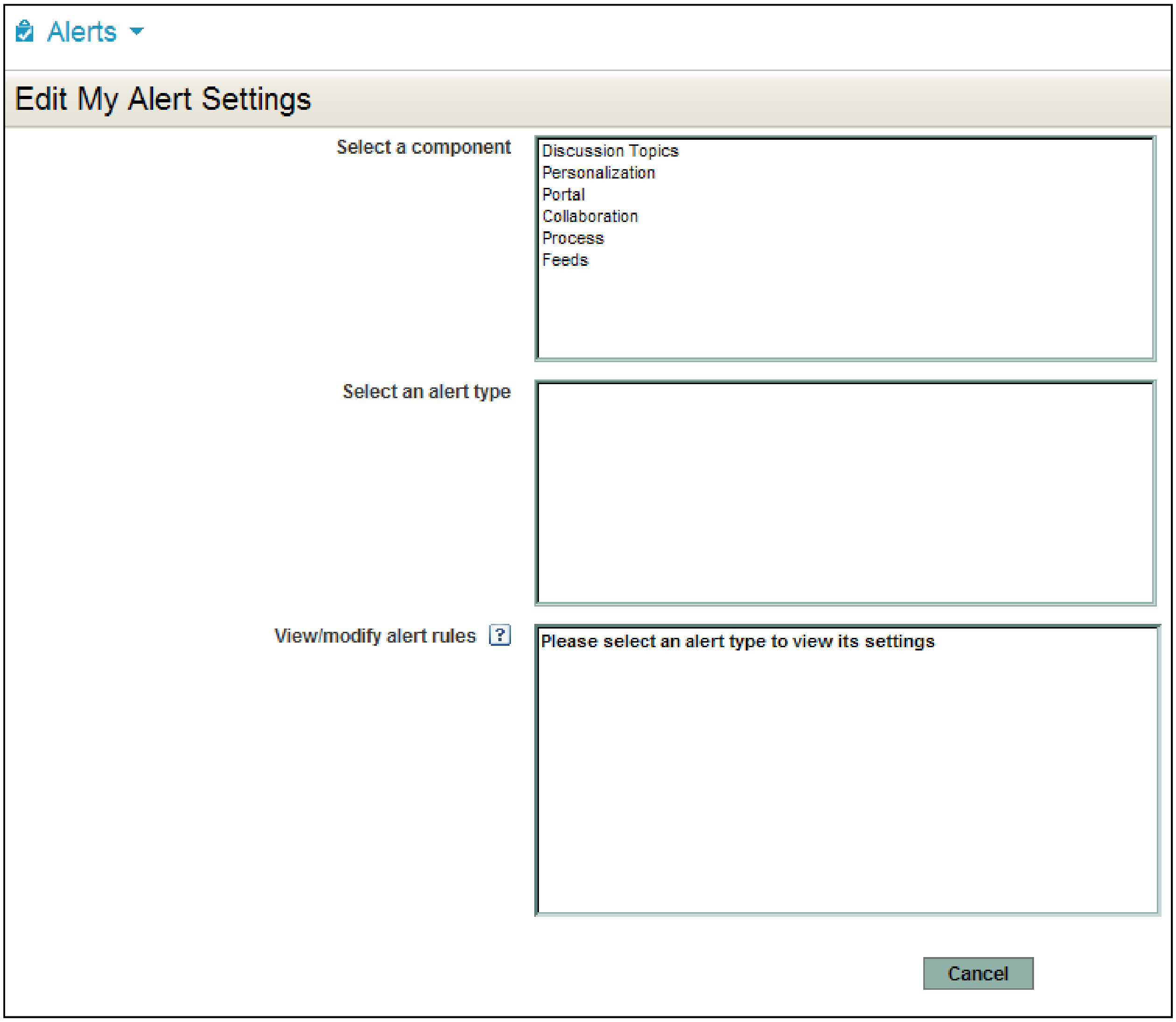
The My Alerts page lists the items you wanted to receive an alert about, such as a new message in a subscribed topic. You may sort your alerts by a column heading value (Alert, Sent Date/Time) by selecting that column heading value.


From the My Alerts page, you may:

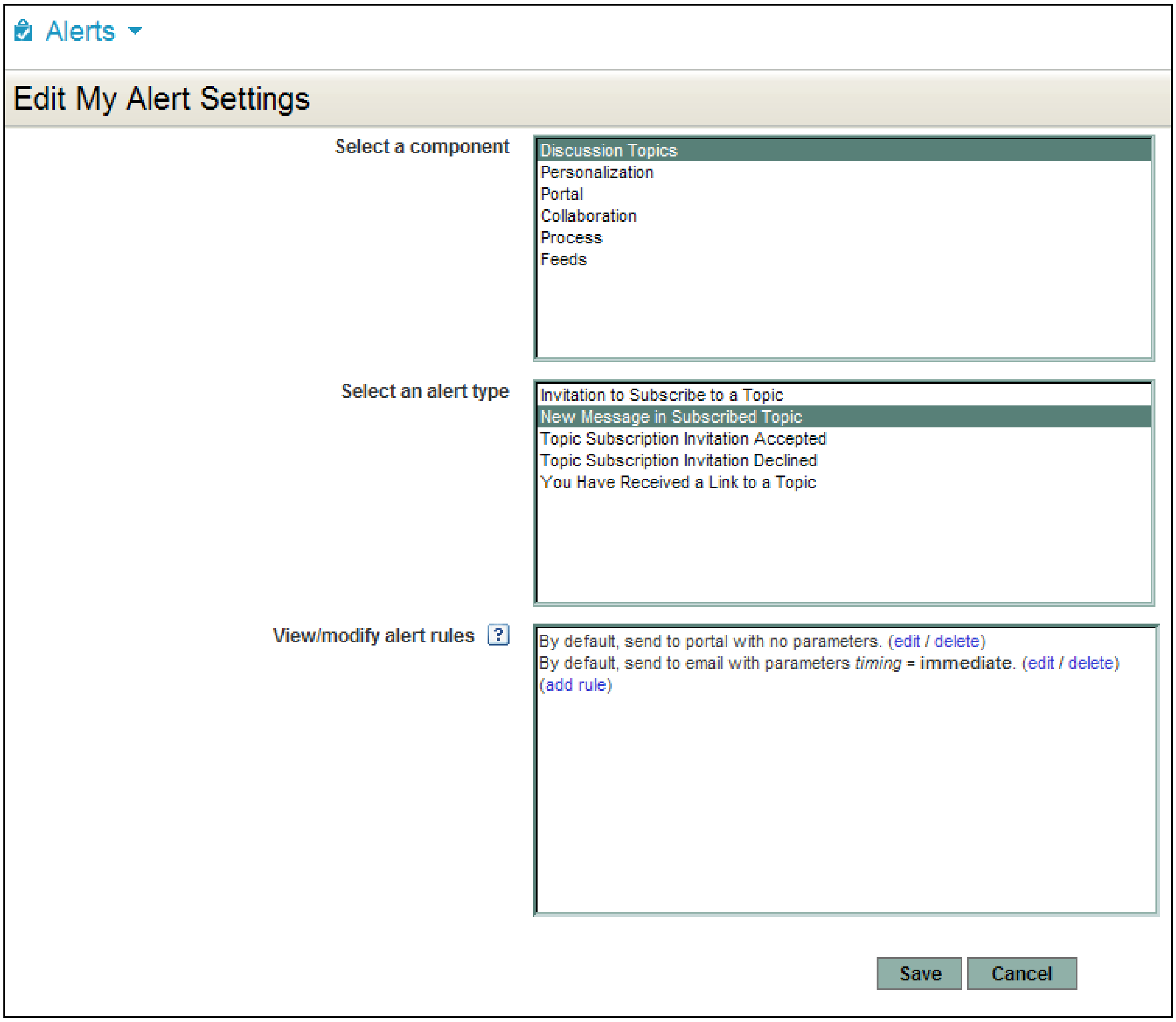
- Change your alert settings
- Delete from the list one or more of your alerts

### *Changing You Alert Settings*

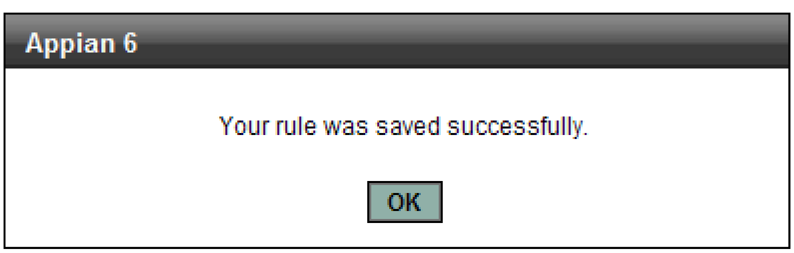
1. From the My Alerts page, select **Edit My Alert Settings**. This takes you to the Edit My Alert Settings page.




2. Select a component. This causes a list of alert types to appear in the Select an alert type box.
3. Select an alert type. This causes a list of alert rules to appear in the View/modify alert rules box.



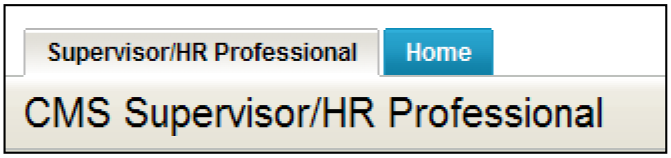

4. Edit, delete, or add a rule as needed.
   ⓘ Select for more information on alert rules.
5. Select **Save**. A pop-up box appears.
   ⓘ Selecting **Cancel** takes you back to the My Alerts page.




6. Select **OK**. This saves the changes you made to your alert settings and closes the pop-up box.
7. From the CMS tool bar, select **CMS** from the drop-down menu to go to the CMS home page or select **Alerts** to go to the My Alerts page or select **Tasks** to go to the My Tasks page.

## CMS Tab Bar

The CMS tab bar has two tabs: Supervisor/HR Professional and Home.




| Select this tab . . . | To |
|---|---|
| Supervisor/HR Professional | Go to CMS home page |
| Home | Go to Tempo<br>(See Tempo section of this guide for more information.) |

## CMS Message Bar

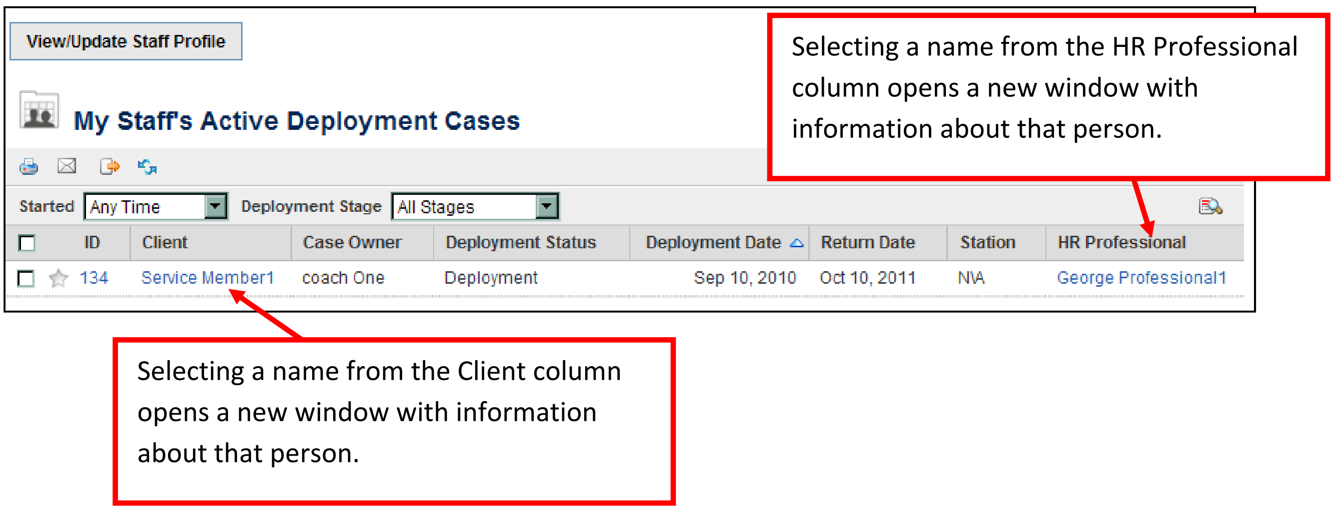
The CMS Message bar is the location where messages will be displayed.

Messages will display in the middle of the bar.

## My Staff's Active Deployment Cases

The My Staff's Active Deployment Cases area of the CMS home page has a View/Update Staff Profile button and a list of all your staff's active deployment cases, where you may:

- Filter by date started and deployment stage
- Sort by a column heading value (ID, Client, Case Owner, Deployment Status, Deployment Date, Return Date, Station, HR Professional) by selecting that column heading value

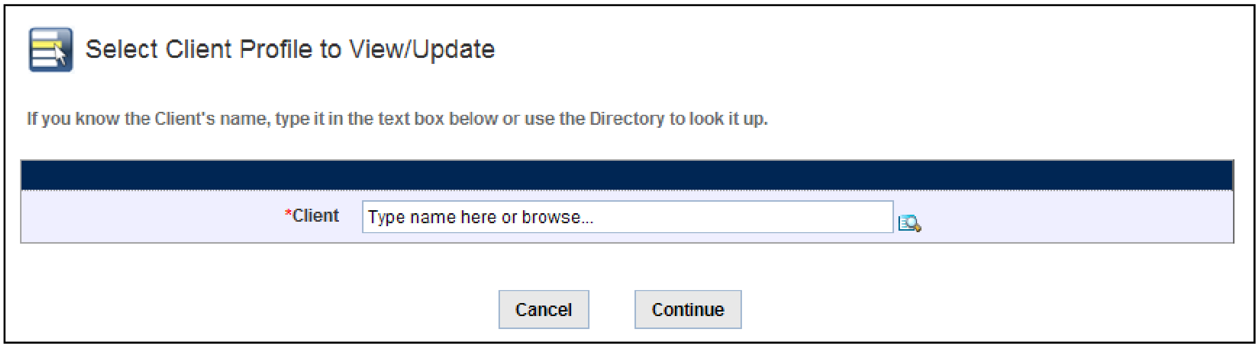



You may also: 

- Print a list of all your staff's active deployment cases
- Email a list of all your staff's active deployment cases
- Export a list of all your staff's active deployment cases to:
    - open in MS Excel, or
    - save as an MS Excel file
- Refresh the list of all your staff's active deployment cases

## Viewing and Updating Your Staff Profile

1. From the CMS home page, select **View/Update Staff Profile**. This opens the Select Client Profile to View/Update field.




2. In the Client field, enter your staff's member name.
3. Select **Continue**.

   ⓘ Selecting **Cancel** closes the Select Client Profile to View/Update field and refreshes the CMS page; a message appears in the message bar indicating the action was completed successfully.

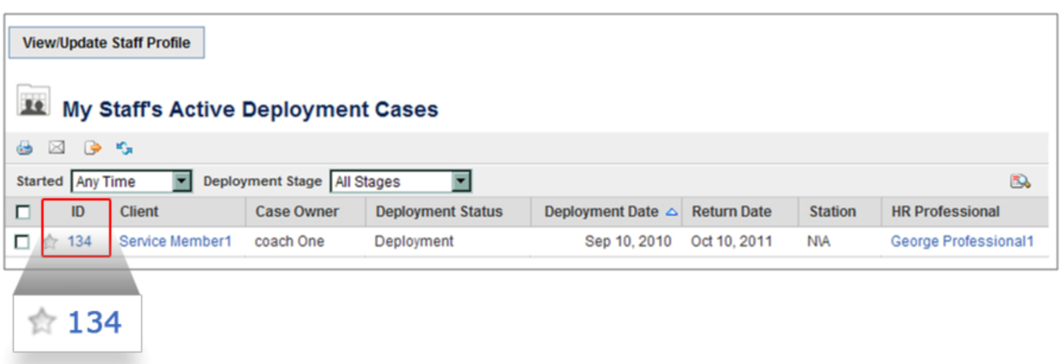
| If you… | Then |
|---|---|
| Have permission to view/edit profile | Go to Step 4. |
| Do not have permission to view/edit profile | An error message appears with an Exit button. Select **Exit**. Then contact a *VA for Vets* Coach to have the information updated. Coaches are available to take your call from 8:00 a.m. to 8:00 p.m. EST at 1-855-VA4VETS (1-855-824-8387). |

4. Update the information as needed.
5. Select **Save**. This refreshes the CMS page, and a message appears in the message bar indicating the action was completed successfully.

   ⓘ Selecting **Cancel** clears any fields you updated and refreshes the CMS page; a message appears in the message bar indicating the action was completed successfully.

## Viewing a Request

1. From the My Staff's Active Deployment Cases, select an ID from the ID column. This takes you to the dashboard for that case.

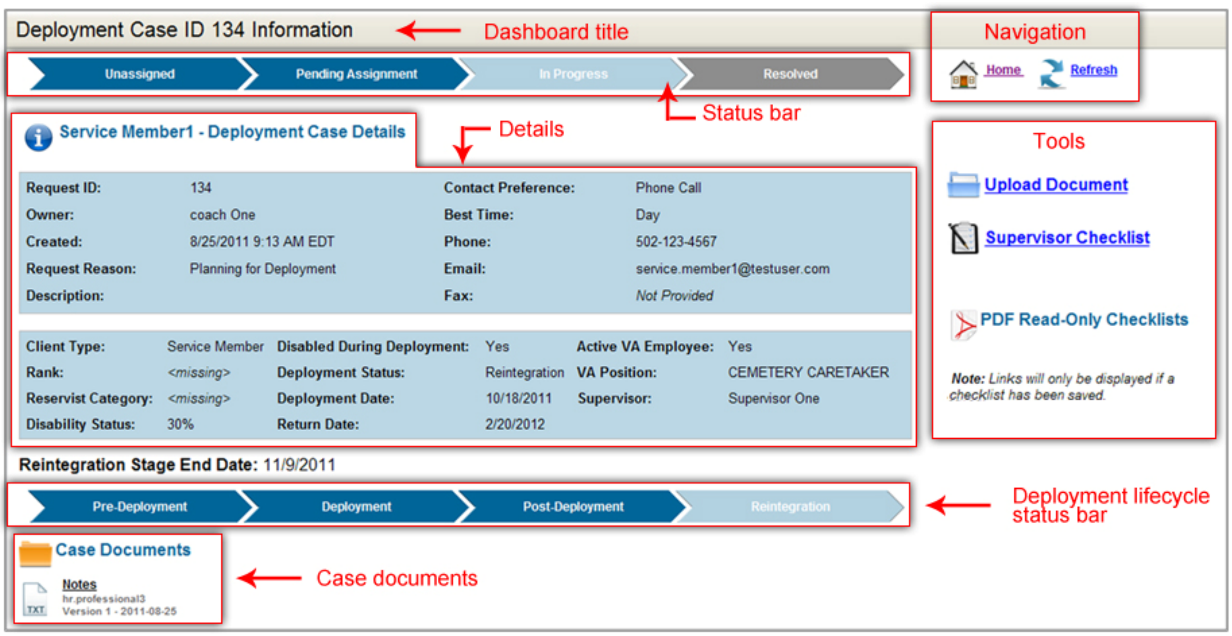


## Deployment Case Dashboard

The CMS creates a case when a service member enters his or her deployment date into the CMS. The CMS uses a dashboard format to organize and present detailed information about a case in a way that is easy to read.

The Deployment Case Dashboard layout consists of:

- Dashboard Title—identifies the deployment case identification number
- Status Bar—identifies the stage of the case in the deployment lifecycle phase
- Detail information—provides information about the case
- Deployment Lifecycle Status Bar—identifies the phase of the deployment lifecycle in which the case is in
- Case Documents—stores documents associated with the case
- Navigation—allows you to return to the CMS home page or refresh the dashboard you are viewing
- Tools—displays tools that are available for you to use



## Deployment Lifecycle

Each branch of service has its own terms for the process Military Service Members go through when they are called to perform military service.

The *VA for Vets* program defines the process as five phases:


- Employment & Readiness
  Begins initially when service members are hired by VA and ends when they receive written or verbal orders to perform military service.
- Pre-deployment
  Starts when service members receive orders or notification to perform military service and ends when they depart from VA to their deployment assignment.
- Deployment
  Starts when service members depart from VA to perform military service and ends when they complete active duty.
- Post-deployment
  Begins when the service members start the military out-processing procedures and initiate the transition back to VA employee status and ends when they return to VA employment.
- Reintegration
  Begins when service members complete active duty and ends when they determine they are fully integrated back into the VA workforce.

The case is based on the phase the service member is in. The Deployment Lifecycle Status Bar identifies the phase and the end date for the phase. In addition, the bar lists the following phases: Pre-deployment, Deployment, Post-deployment and Reintegration, and identifies its status through the use of color:

- Dark blue means that phase has been completed
- Light blue indicates the current phase
- Gray means the case has not yet made it to that phase

Each phase the case goes through has four stages:

- Unassigned—the case has not been assigned to a Coach
- Pending Assignment—the case but has not been formally assigned to a Coach
- In Progress—the case has been assigned to a Coach
- Resolved—the case has moved to the next phase in deployment lifecycle; if the case is in the Reintegration phase, the case is closed after 30 days from the return date entered into the CMS.

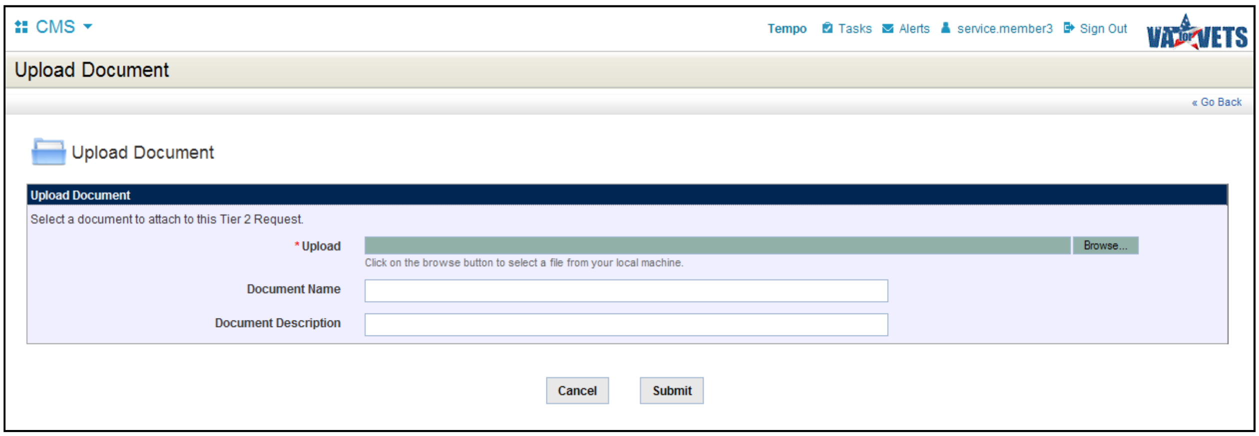
## Dashboard Tools

The tools that may be available on the dashboard are as follows:

- Upload Document
- Supervisor or HR Professional Checklist (depending on your role)
- PDF Read-Only Checklists

### *Upload Document*

1. From the dashboard, select **Upload Document**. This takes you to the Upload Document page.




2. Select **Browse** to locate the document you want to upload.
3. In the Document Name field, enter the title of the document.
4. In the Document Description field, enter a description of the document.
5. Select **Submit**. A message displays indicating the document was submitted; you are then returned to the dashboard.

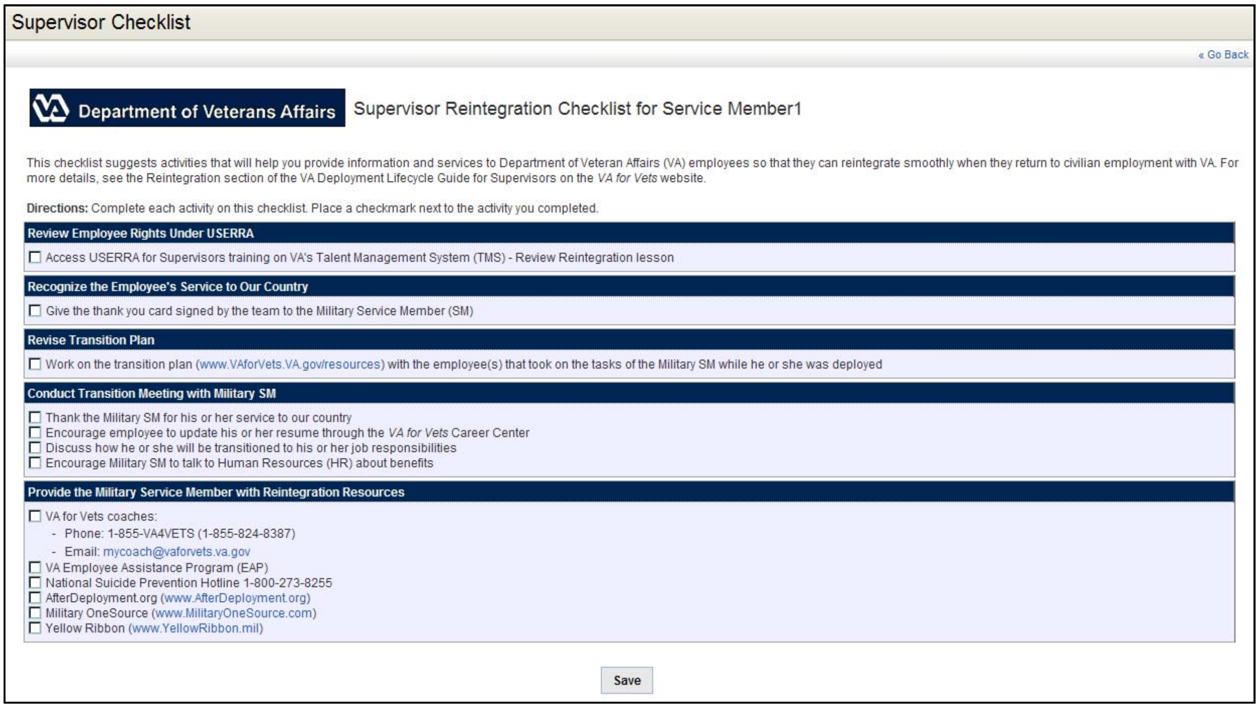
   ⓘ To view the document you just uploaded, you will need to select **Refresh**. After the page is refreshed, a link to the document will appear in the Case Document area.

   ⓘ Selecting **Cancel** clears any fields you may have completed and returns you to the dashboard.

## *Viewing and Editing Your Checklist*

Selecting the Supervisor or HR Professional Checklist tool takes you to the checklist for the phase of the deployment lifecycle your service member is in. The checklist lists the job-related actions you need to complete during that phase. You may check any task or activity you have completed on the checklist.

1. From the dashboard, select **<your role> Checklist**. This takes you to your checklist for the phase of the deployment lifecycle the service member is in.

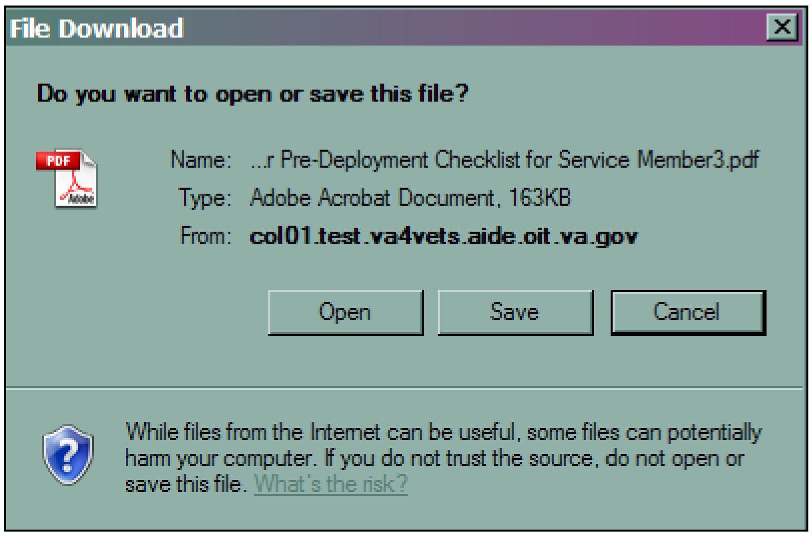



2. Select each activity you have completed.
   ⓘ If viewing only the checklist, select **Go Back** to return to the dashboard.
3. Select **Save**. This updates the checklist and takes you back to the dashboard.

### *Viewing the PDF Read-Only Checklists*

The PDF Read-Only Checklists tool lists the checklists for the service member and the other role (supervisor or HR professional) for the phase of the deployment lifecycle the service member is in. The checklist lists the job-related actions your service member and the other role (supervisor or HR professionals) need to complete during that phase. You may view tasks and activities the service member and/or the other role (supervisor or HR professional) have completed and the tasks and activities that still need to be completed.

1. From the Deployment Case Dashboard, select a checklist listed below PDF Read-Only Checklists. This opens a dialog box.



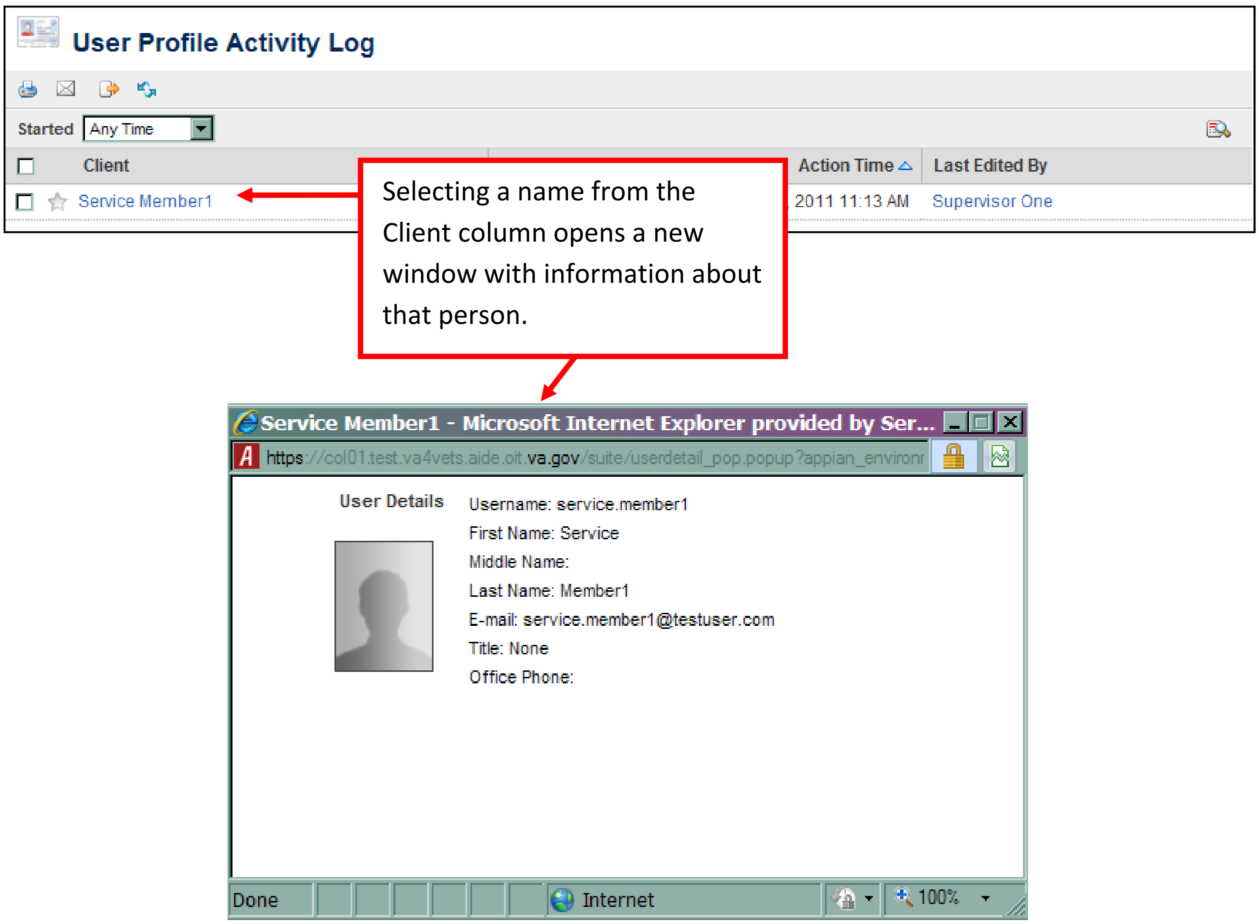

| If you want to . . . | Then |
|---|---|
| View the checklist | Select **Open**. This opens the checklist in a new window and closes the dialog box.<br>ⓘ Select  in the upper right corner of the window that is displaying the checklist to close the window. |
| Store the checklist on your computer | Select **Save**. This saves the checklist to a location of your choice on your computer and closes the dialog box. |
| Go back to the Deployment Case Dashboard | Select **Cancel**. This closes the dialog box. |

ⓘ You may also find blank copies of the checklist on the *VA for Vets* website Reintegration page in Resources.

# User Profile Activity Log

The User Profile Activity Log area of the CMS home page lists each time one of your staff's profiles has been updated. You may do the following with the list:

- Filter by date started
- Sort by a column heading value (Client, Action Time, or Last Edited by) by selecting that column heading value




You may also: 

- Print a list of the user profile activity log
- Email a list of the user profile activity log
- Export a list of the user profile activity log to:
  - open in MS Excel, or
  - save as an MS Excel file
- Refresh the list of the user profile activity log

## Quick Links

The Quick Links area of the CMS home page contains a list of links to programs that provide services to Military Service Members and Veterans.


| Select . . . | To |
|---|---|
| AfterDeployment.org | Go to the afterdeployment.org website<br><br>afterdeployment.org is a wellness resource for the military community. Our mission is to help service members, their families, and Veterans overcome common adjustment problems following a deployment.<br><br>The resources and exercises on afterdeployment.org address post-deployment challenges, including post-traumatic stress and triggers; conflict at work; reconnecting with family and friends; depression; anger; sleep problems; substance abuse; stress management; kids and deployment; spiritual guidance; living with physical injuries; health and wellness; and much more.[1] |
| MilitaryOneSource.com | Go to the Military OneSource website<br><br>Military OneSource is a free service provided by the Department of Defense to service members and their families to help with a broad range of concerns including money management, spouse employment and education, parenting and child care, relocation, deployment, reunion, and the particular concerns of families with special-needs members. They can also include more complex issues like relationships, stress, and grief. Services are available 24 hours a day — by telephone with professionally trained consultants and online. Many Military OneSource staff members have military experience (Veterans, spouses, Guardsmen, Reservists), and all receive ongoing training on military matters and military lifestyle. The program can be especially helpful to service members and their families who live at a distance from installations.[2] |

[1] Afterdeployment.org Frequently Asked Questions, Retrieved October 19, 2011, from http://www.afterdeployment.org/frequently-asked-questions
[2] About Military OneSource, Retrieved October 19, 2011, from http://www.militaryonesource.com/MOS/About.aspx

| Select . . . | To |
|---|---|
| USERRA | Go to the United States Department of Labor website<br>This website provides information about the Uniformed Services Employment and Reemployment Rights Act (USERRA), which protects service members' reemployment rights when returning from a period of service in the uniformed services. |
| VAforVets.gov | Go to the *VA for Vets* Program website<br>*VA for Vets* facilitates the reintegration, retention and hiring of Veteran employees at the Department of Veterans Affairs (VA). We offer career-search tools for Veterans seeking employment at VA, career development services for our existing Veterans, and Coaching and reintegration support for military service members.[3] |
| YellowRibbon.mil | Go to the Yellow Ribbon Reintegration Program website<br>The mission of the Yellow Ribbon Reintegration Program (YRRP) is to promote the well-being of National Guard and Reserve members, their families and communities, by connecting them with resources throughout the deployment cycle. YRRP connects Guard and Reserve service members, their families and loved ones with local resources before, during and after deployments, especially during the reintegration phase that occurs months after service members return home.[4] |

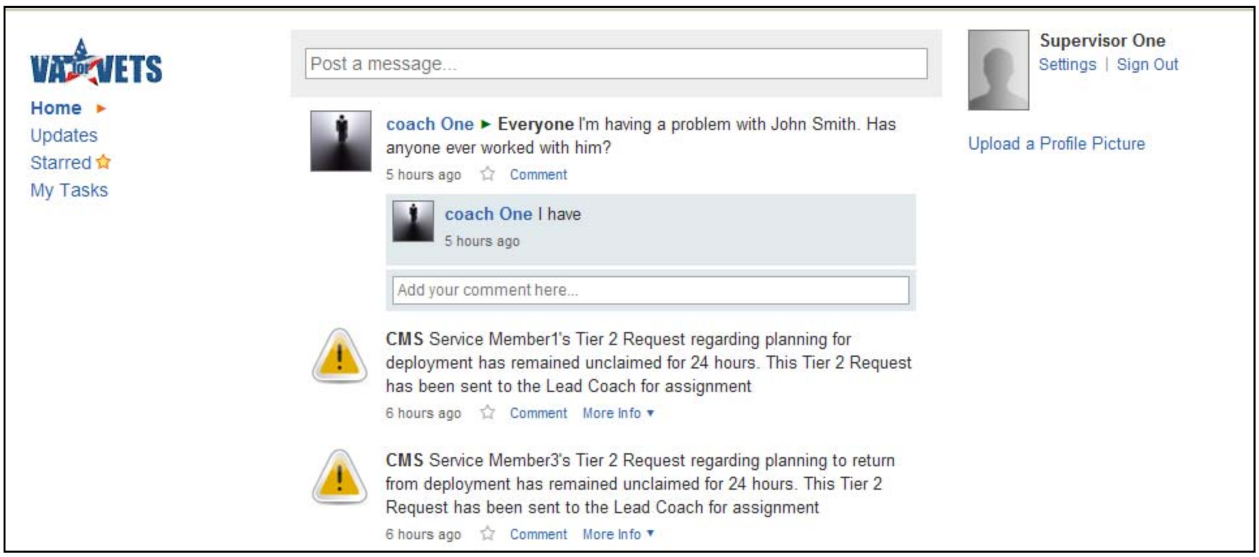
[3] *VA for Vets* home page, Retrieved October 19, 2011, from http://VAforVets.VA.gov
[4] Yellow Ribbon Reintegration Program Frequently Asked Questions, Retrieved October 19, 2011, from http://www.yellowribbon.mil/about/faq

# Tempo

Tempo is a real-time collaboration tool where you can:

- Post comments to messages
- Identify messages you want to access quickly by starring them
- Sort messages and comments by most recently updated or starred
- View your tasks
- Set up your subscriptions to monitor the messages that are meaningful to you
- Upload a photo to your profile

ⓘ The default view of the message list shows the most current messages at the top and the oldest at the bottom.




## Accessing Tempo

1. From the CMS tab bar, select **Home**. This takes you to the Tempo home page.

## Closing Tempo

1. Select in the upper right corner of the window. This closes the window and signs you out of Tempo.
   ⓘ Selecting Sign Out from Tempo logs you off the CMS.