Family Management Program (FMP) Guidance and Instruction Documents

Family Assistance Program - 2015

Table of Contents
FMP Guidance Documents

The documents listed below are all separate sections within the FMP system. As the system is updated, revised handout materials will be sent to FMP users. Note: Each document is numbered individually.

Family Management Program (FMP)
QUICK TRACKERS

April 2015

Family Management Program (FMP)
QUICK TRACKER GUIDELINES

Overview and Definition

A *Quick Tracker* (QT) is a record created to track informal information requests which do not require follow-up, detailed research or assistance (i.e. quick responses to non-emergent needs).

At present, Quick Trackers are also used to track information and materials presented by FAC staff at events. Briefing topics or materials given by other presenters may not be included. Additionally, Quick Trackers are used to track service materials at on-site location maintained by FAC staff (i.e. brochure/literature racks). As FMP further develops, these types of Quick Trackers may be moved to be included in Briefings and Site Visits.

Quick Trackers must be entered into the Family Management Program (FMP) within 72 hours of occurrence.

What can be counted as a QT?

1. Informal information inquiries (questions or referrals) which do not require follow-up or action.
    a. Example: Family Member asking for rear detachment contact information, giving contact information for DEERS or TRICARE
2. Service materials
    a. Example: Giving out 30 TRICARE brochures at a Yellow Ribbon event
    b. Example: restocking of materials at an armory.

What cannot be counted as a QT?

1. Information provided when working a case or during outreach and contact calls.
2. Briefing topics or materials given by other presenters.
    a. Example: A veterans benefits briefing given by TAA.
3. Donated items for Service Members and Family Members
    a. Example: Ball game tickets, Girl Scout cookies, school supplies

Quick Tracker Categories

Child and Youth Related

- Child and Youth Programs
- Child Care Funding
- Child Care Programs and Provider Referral
- Deployment Information/Child and Youth
- Family Readiness Youth Groups
- Military Youth Contributing to Youth Programs
- Youth Activities (Youth camps/ Youth groups-paperwork, applications etc.)

Communications

- Calling Card Request
- Computer Use/ VTC Request/ Video Solution/ DSN
- Newsletters
- Rumor Control
- Service Member Not in Contact with Family
- Social Media communications (Facebook, Twitter)

Community Outreach/Partnerships

- Community/Individual Donations
- Community Partnerships
- Offer of donation and/or Holiday Adoption
- Marketing Events
- Volunteer opportunities/services

Community Resources

- Elder Care
- Food Banks
- Shelter Services
- Public Assistance

Counselor Support and Contact Info

- Behavioral Health Education Materials
- Chaplain referral
- Civilian resources
- Family referral
- Individual referral
- Does not include Family Advocacy Program or MFLC

Death and Survivor Benefits

- Information and referral
- Survivor Benefit Plan

Deployment /Mobilization Support

- Care Packages
- Deployed Units / Mailing Address
- Education Materials
- Timeframe
- Medical Hold/ Line of Duty/ MMSO Questions
- Mobilization/ Reintegration Location and/or Timeframe
- Pre-Mobilization Location and/or Timeframe
- Reintegration with local unit
- Reunion Briefings
- YRRP Event Information

Education – Service Member
- Education Grant and/or Scholarship Information From Local and/or National Programs
- Education Office

Education – Spouse
- Education Grant and/or Scholarship Information From Local and/or National Programs
- Military Spouse Employment Program (MSEP)
- MyCAA

Education – Youth
- Education Grant and/or Scholarship Information From Local and/or National Programs
- Military Child Education Coalition (MCEC)

Employer Support of the Guard and Reserve (ESGR)
- Employer Inquiry
- Family Member Problem w/ Employer
- Questions about ESGR Benefits and entitlements
- Re-Employment Issues Following Deployment
- Service Member Problem with Employer

Employment – Spouse
- Career opportunities
- Job Assistance/Job Fairs/ Unemployment

Employment – Service Member
- Career opportunities
- Disabled Veterans Outreach Program (DVOP)
- Helmets to Hard Hats/H2H
- Job Assistance/Job Fairs/ Unemployment
- Local Veterans Employment Rep (LVER)
- State Employment Commission
- Workforce Services

Employment – Youth
- Career opportunities
- Job Assistance/Job Fairs/ Unemployment

Exceptional Family Member Program (EFMP)
Overview: The Army created the Exceptional Family Member Program (EFMP) to support Military Families with special needs Family member. EFMP is a comprehensive, coordinated, multi-agency program that provides community support, housing, medical, educational, and personnel services to military Families with an EFM.
- EFMP referral and contact info

Family Advocacy Program
Overview: Family Advocacy Programs (FAP) provides Families with direct services, and conducts various prevention, training, and data-collection activities dedicated to domestic and Child abuse prevention, education, prompt reporting, investigation, intervention and treatment.
- Referral and contact info

Family Assistance

- Educational materials
- FAC Program information

Family Care Plan

- Documents required
- What is a Family Care Plan
- Who is Required to Have a Care Plan

Family Readiness

- Emotional Support During Deployment (Family Members)
- Family Readiness Support Assistant referral
- Family Readiness Training/Education
- Find and/or Join FRG (Family Members)
- Local FRG and/or Unit Websites Contact Info
- Parents of Service Members/Support
- Social Events
- Volunteer Support (FRG)

Financial

- Budget Counseling
- Education materials
- Personal Financial Management
- Tax Assistance (W2s or Tax Preparation)

ID Cards

- DEERS Enrollment
- Eligibility
- ID Card Locations
- Required paperwork for ID Card

Legal

- Education Materials
- Legal referral

Military Retirement

- Benefits (Commissary/Post Exchange/MWR)
- SF 180 (separation papers)

Natural Disaster

- Contact info and educational materials

Personal and Family Life Education

- Educational materials (problem solving, stress management, parenting, fitness, nutrition, wellness, health)
- MFLC referral
- PREP/Strong Bonds
- Resiliency Training and Referral

Relocation Assistance

- PCS information, education materials and referral

Service Member Pay
- Entitlements
- Military Pay Website (MyPay/ Military Pay Charts/ Websites)

TRICARE Information and Referral
- TRICARE - TAMP
- TRICARE Dental Providers / Locating
- TRICARE for Life
- TRICARE Medical Providers / Locating
- TRICARE Pharmacy
- TRICARE Program Information / Standard, Prime, Prime Remote/ Travel Reimbursement
- TRICARE Reserve Select (TRS)
- TRICARE Retired Dental
- TRICARE Retired Reserve (TRR)
- TRICARE Vision
- TRICARE Young Adult (TYA)

Urgent/Critical
- Non-emergent contact info and educational materials

VA Related
- Benefits
- Contact info and educational materials
- Education programs
- Loans
- Medical and Dental
- Military Services Documentation
- Rehabilitation
- Veteran Specific Services (ACAP, Advocacy)
- VGLI

Examples of Quick Trackers

Listed below are examples of Quick Trackers that are tracked in FMP:

- Service Member asks for the number of the nearest DEERS office.
- Commander calls to get the local VFW address.
- Provided H2H contact information to SM.
- Restocking of materials at armory. Note: tracked under specific topic.
- Handed out FAC brochures when briefing at local ISFAC meeting.

Family Management Program (FMP)
ADDING A QUICK TRACKER RECORD

To add a Quick Tracker record, follow the steps below:

1. From the main landing page, click on the **Quick Tracker tab**.

2. Enter the **number of quick trackers** in the text field for the specific topic listed.
   a. There are two columns for the different "types" of Quick Trackers; Material and Information.
      i. Materials: a tangible item (i.e. brochure, handout).
      ii. Information: information given verbally or through email.
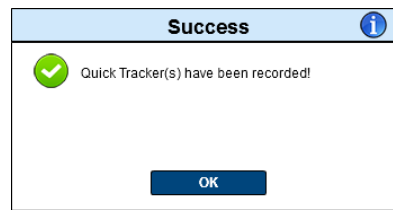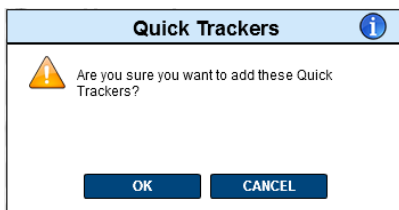
3. Enter the **date** using the calendar icon.

4. Enter the **Branch of Service** from the drop down menu.
   a. Branch of Services are listed below.
      i. Note: Family Members should be listed under the branch for their Service Member.

Army National Guard	Community Member	Marine Corp Reserve
Army	Air National Guard	NOAA
Army Reserve	Air Force	Navy
Coast Guard	Air Force Reserve	Navy Reserve
Coast Guard Reserve	Marine Corp	USPHS

5. Enter the **Deployment Status** from the drop down menu.

Unknown	Non-Deployed
Pre-Deployment	Mobilized
Deployment	Retired
Post-Deployment	

6. Select **Track Items** to save the record.
   a. A pop up window will appear verifying you want to add the record. Select OK to proceed or cancel to not save.
   b. A pop up window will appear to confirm your record has been saved. Select OK.

7. Select **View Recent Items** to view your entries.

Remove a Recent Quick Tracker Entry
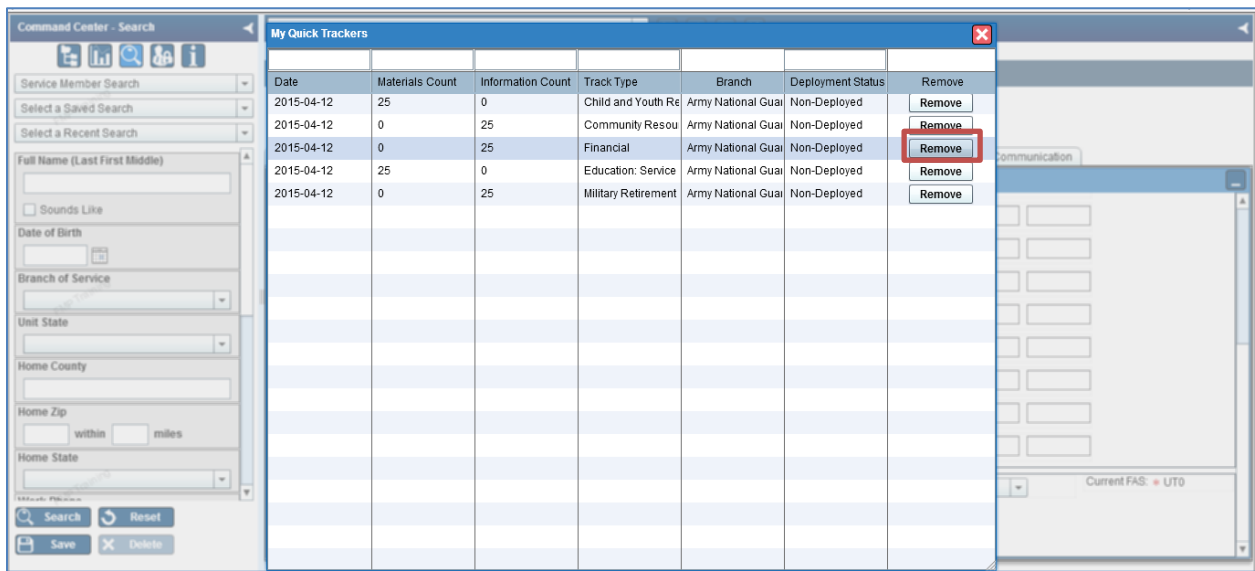
To remove a recent Quick Tracker entry, follow the steps below:

1. Select **View Recent Items** at the bottom of the Quick Tracker page.
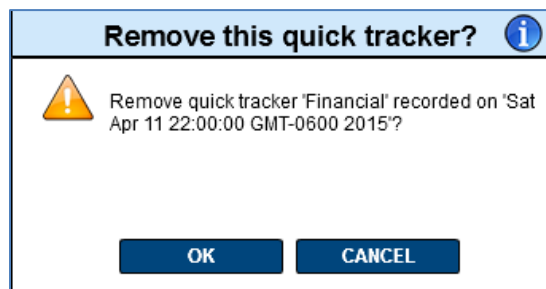
2. A list of your recent Quick Trackers will populate in a new window.
3. Select **Remove** for the line item you wish to delete.

4. A pop up window will appear to verify if you want to remove the record. Select OK to proceed or cancel.

5. If you selected OK to remove, a pop up window will appear confirm your record has been removed. Select OK.

6. Your record is now removed from your Quick Tracker listing.

Family Management Program (FMP)
MASS COMMUNICATIONS

April 2015

Family Management Program (FMP)
MASS COMMUNICATION GUIDELINES

Overview and Definition

A *Mass Communication* is a record created to track informal information that is provided in mass via newsletters, emails, auto phone messaging, texting, or social media and is related to the Six Essential Services.
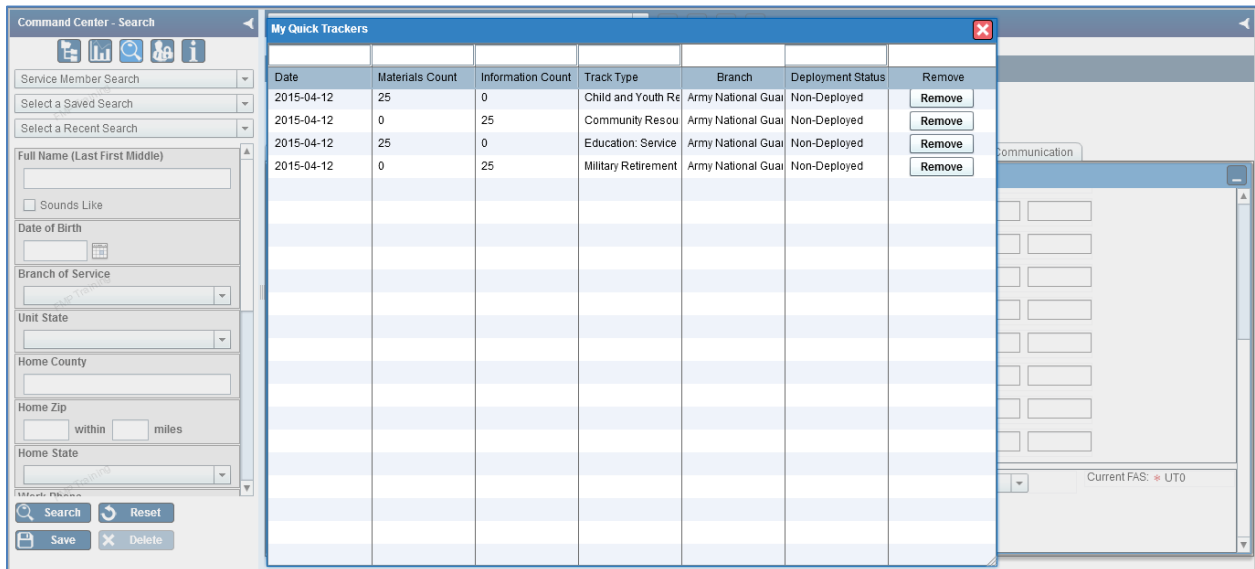
Mass Communication:

- May be sent to Service Members, Family Members, units, community resources, or any combination of these groups. The information must be relevant to each recipient and be timely and applicable.
- Are **NOT** to be used for Outreach or Contact purposes.
- Documents containing multiple topics are only counted as one record.
- Documents that contain Information or articles provided by Family Assistance staff for other publications (i.e. unit newsletter) may also be documented as a Mass Communication record.
- Must be entered into the Family Management Program (FMP) within 72 hours of occurrence.

Mass Communication Methods

Automated Phone Message

An automated voice system is where an individual can record a voice or text message, whether it's critical or routine, and send it out to desired contacts.

Distribution Counts:

- Count the number of individuals who are receiving the message. If the message is being sent to both a cell and home phone for the same individual, it should only be counted as one.

Examples:

- Message sent to potential attendees of an upcoming Tricare Educational briefing.
- Message sent updating Family Members on the location and time of a Yellow Ribbon event.

Email

With email sent as a Mass Communication (i.e. group distribution), recipients should be listed in the BC area. This protects Personally Identifiable Information (PII).

Distribution Counts:

- Count the number of individuals who are receiving the email. If the email is being sent to both a personal and work email address for the same individual, it should only be counted as one.

Examples:

- Providing information on job opportunities to SMs who have asked for this information (i.e. Employment Opportunity distribution list).
- Providing information on youth activities to Families with children who are eligible to attend the youth events.

Flyer/Newsletter

Flyer/Newsletters that contain Information or articles provided by Family Assistance staff for other publications (i.e. unit newsletter) may also be documented as a Mass Communication record.

Distribution Counts:

- Count the number of individuals who are receiving the newsletter or flyer.
- Count number of members in organization or unit when contributing to a newsletter or flyer.

Examples:

- Family Assistance newsletter distributed to Families of deployed Service Members.
- Sending a flyer on a during deployment Yellow Ribbon event to Families of deployed Service Members.

Social Media

Social Media platforms include, but are not limited to, Face Book, Twitter, etc. Ensure OPSEC is followed.

Distribution Counts:

- Count likes or views with an "event".

Examples:

- Post on State Family Assistance Face Book page with tax preparation information and resources.
- Post on a unit's page with information on education grants for Guard Members.

Postal Mail

Information sent to individuals via postal service (i.e. the United States Postal Service.

Distribution Counts:

- Count the number of addresses where mail is being sent.

Text

A group text message can be sent to a desired group of contacts.

Distribution Counts:

- Number of individuals that were included in the text. If the text message is being sent to both a work and personal cell phone for the same individual, it should only be counted as one.

Examples:

- Text sent to notify attendees of a canceled event due to inclement weather.
- Text sent reminding people who are registered to attend an event of the event date and time.
-

Mass Communication Content

Mass Communication content to be documented is the same as the Quick Tracker categories. The bullets listed under the categories below provide a guide as to the type of items/information for that category.

Child and Youth Related

- Child and Youth Programs
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- Reunion Briefings
  YRRP Event Information

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- Education Grant and/or Scholarship Information From Local and/or National Programs
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- Required paperwork for ID Card

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- VGLI

Family Management Program (FMP)
MASS COMMUNICATION

The following handout covers key actions related to creating a Mass Communication record. Mass Communication records were designed to allow personnel to track informal information that is provided in mass via newsletters, emails, auto phone messaging, texting, or social media and is related to the Six Essential Services.

Mass Communication may be sent to Service Members, Family Members, units, community resources, or any combination of these groups. The information must be relevant to each recipient and be timely and applicable.

Adding a Mass Communication Record

To create a Mass Communication record, follow the instructions below:

1. From the landing page, click on the **Add Mass Communication** tab.
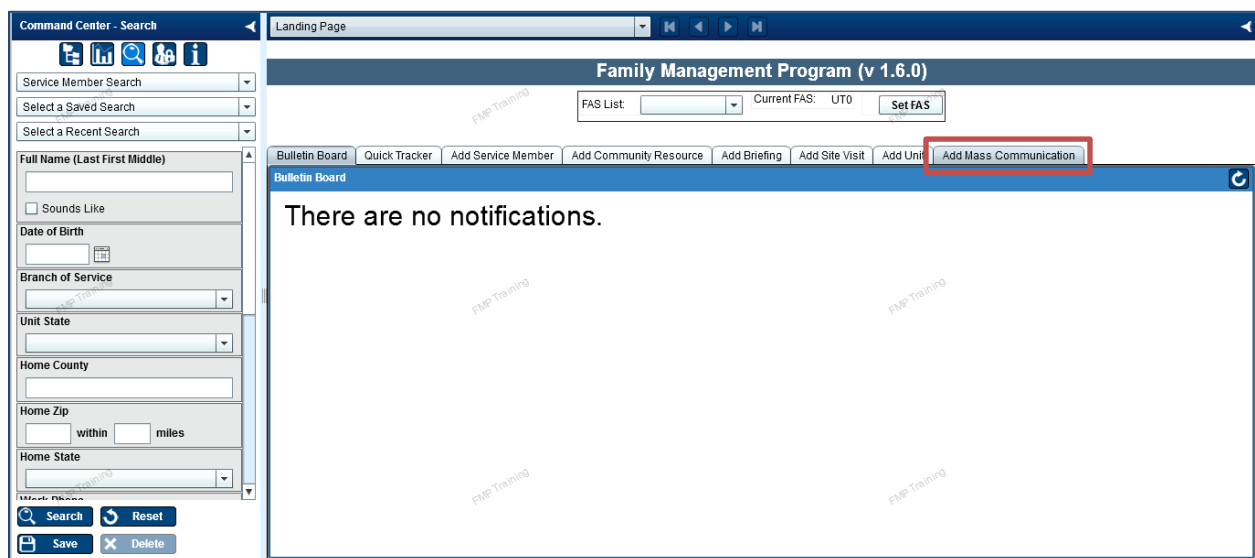
2. Enter the **Date** by clicking on the calendar icon.

3. Choose the **Method** of communication by selecting from the drop down menu.

4. From the drop down menu, select your **Role** (creator or contributor).

    a. Contributor: Select when information or articles are provided by Family Assistance staff for other publications (i.e. unit newsletter).

   b. Creator: Select when Family Assistance staff create/develop the document.
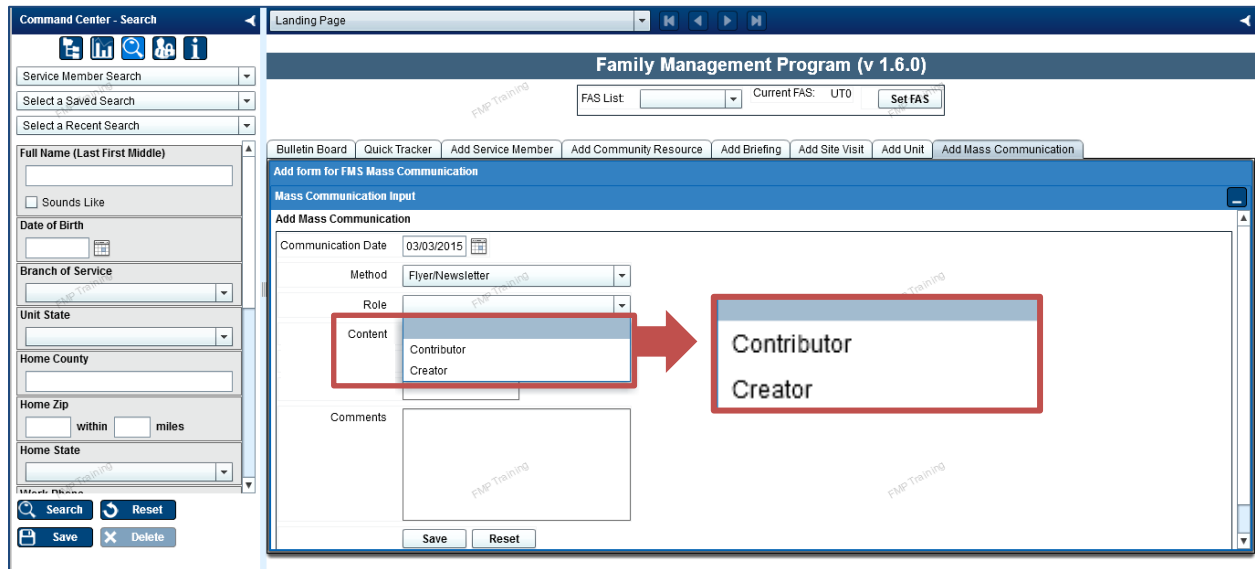
5. Select the **Content** included in your mass communication by checking the box next to the topic(s) in the drop down menu.
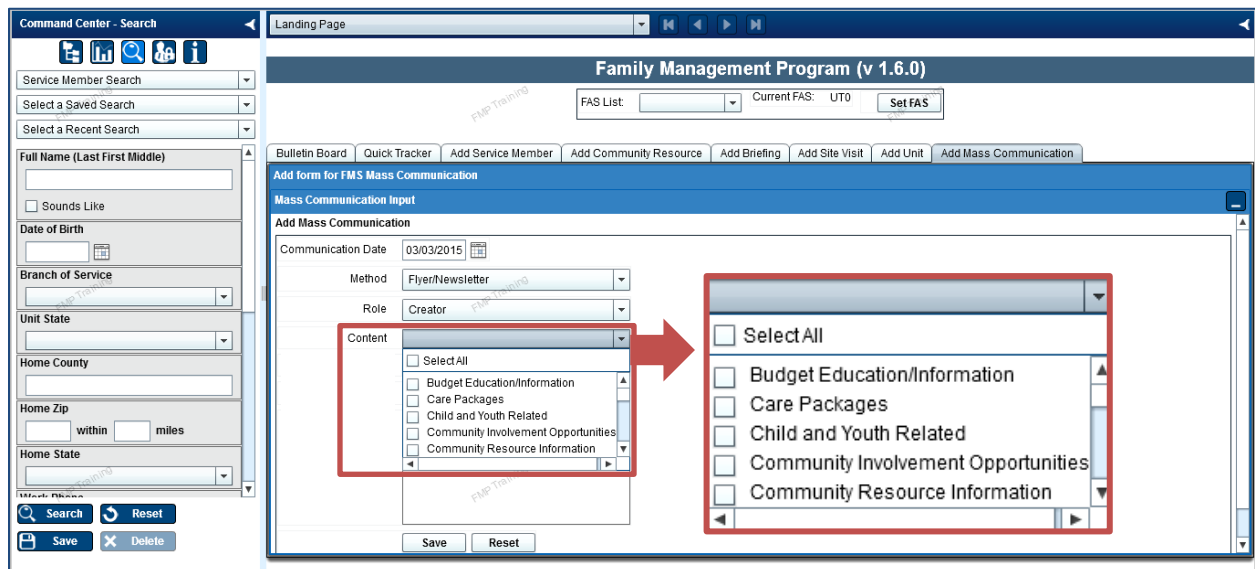
6. Select the **Recipients** from the drop down menu. You can choose more than one type of recipient.
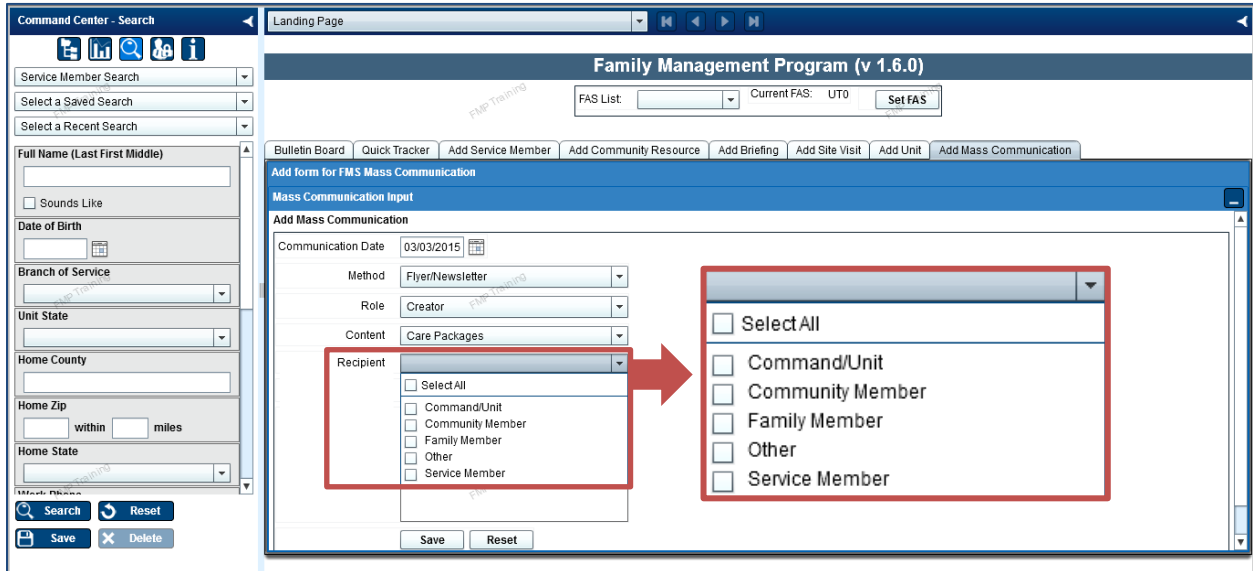
7. Enter the number of recipients in the **Distribution Count** text field and detailed **Comments** about the mass communication. Select **Save** to save the record.
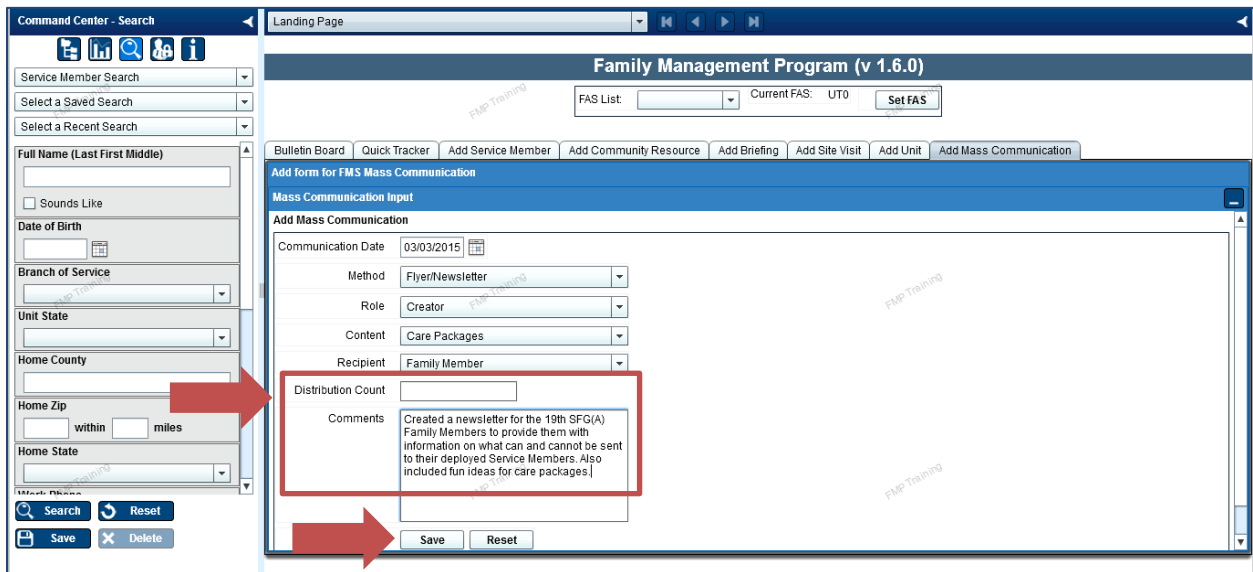
8. Once the document is saved, a pop-up Success message appears. **Click OK**.

9. Once the record is saved, the record opens. You can upload supporting documents from the record page.
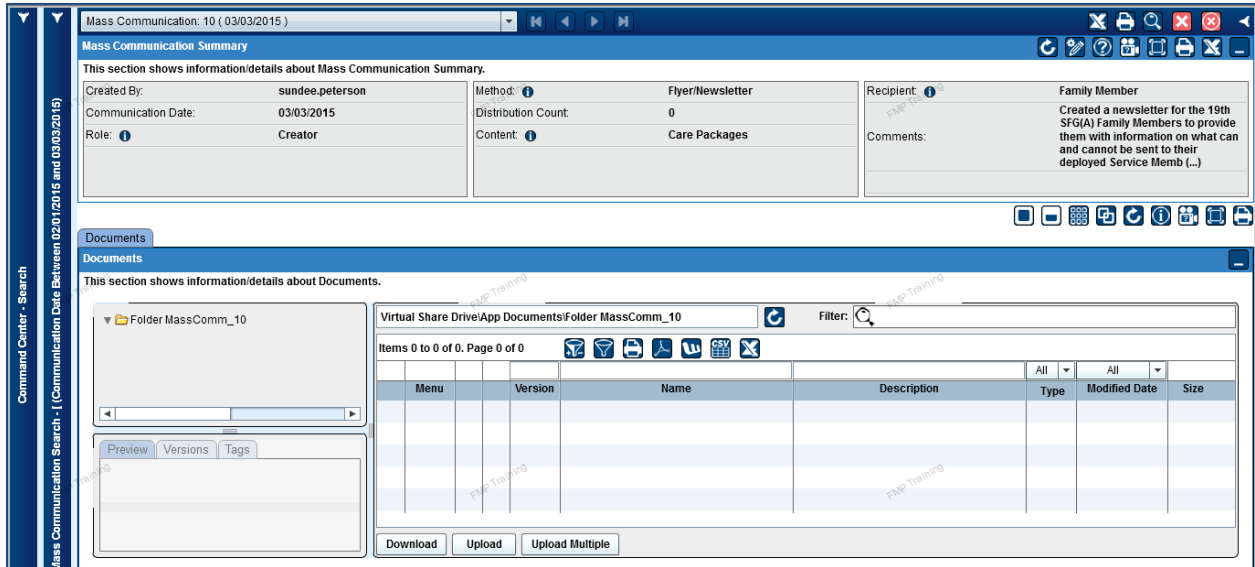
Uploading Documents

To upload a document in the Mass Communication record, follow the steps below:
1. Select **Upload** to open the Upload File window.
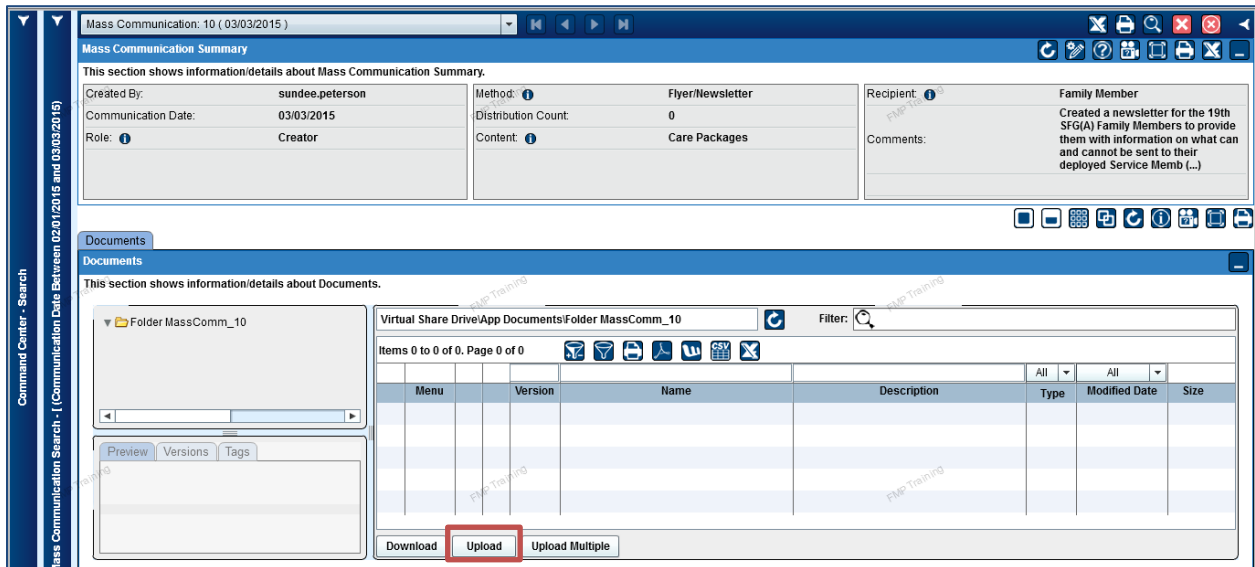
2. **Browse your documents** and select the desired file. Note: Documents must be in PDF, Word or Excel format. Select **Save** to upload the document.

3. The document is now listed in the Mass Communication record.
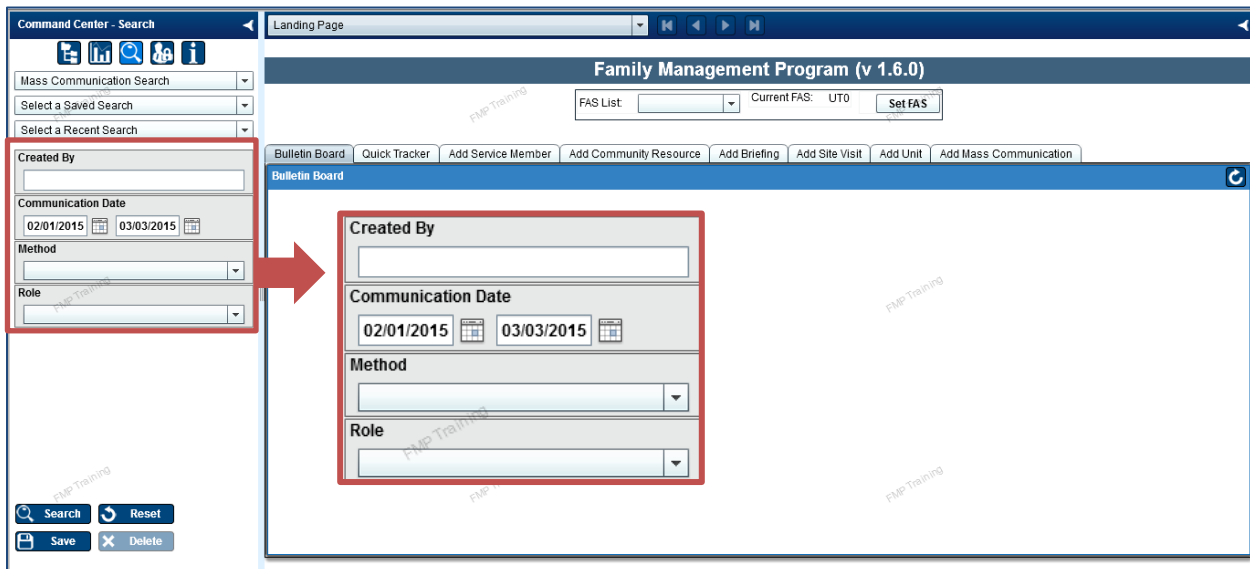
Searching for a Mass Communication Record

To search for a Mass Communication record, follow the instructions below:
1. From the Command Center, select **Mass Communication** as your desired search.
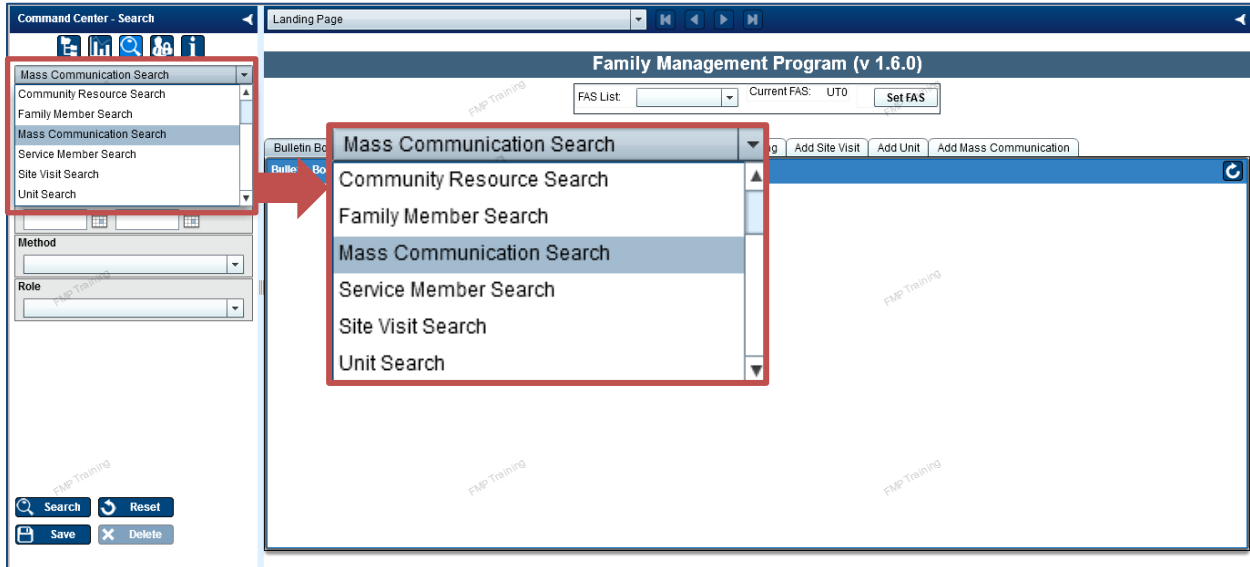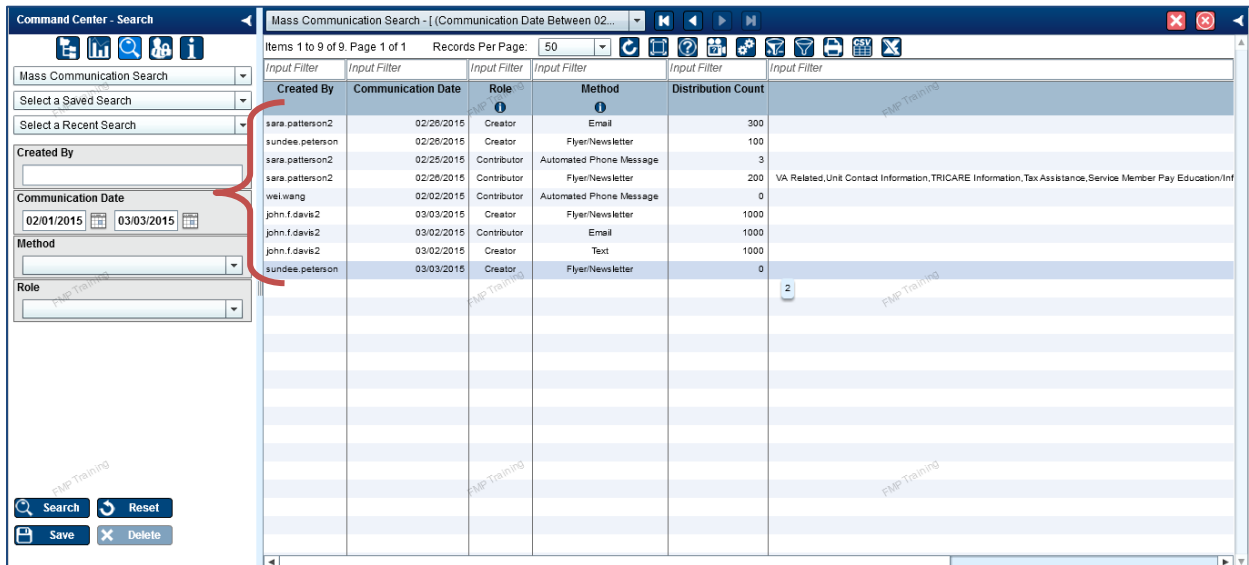

2. Enter the **search criteria**. You can choose one or a combination of the following criteria:
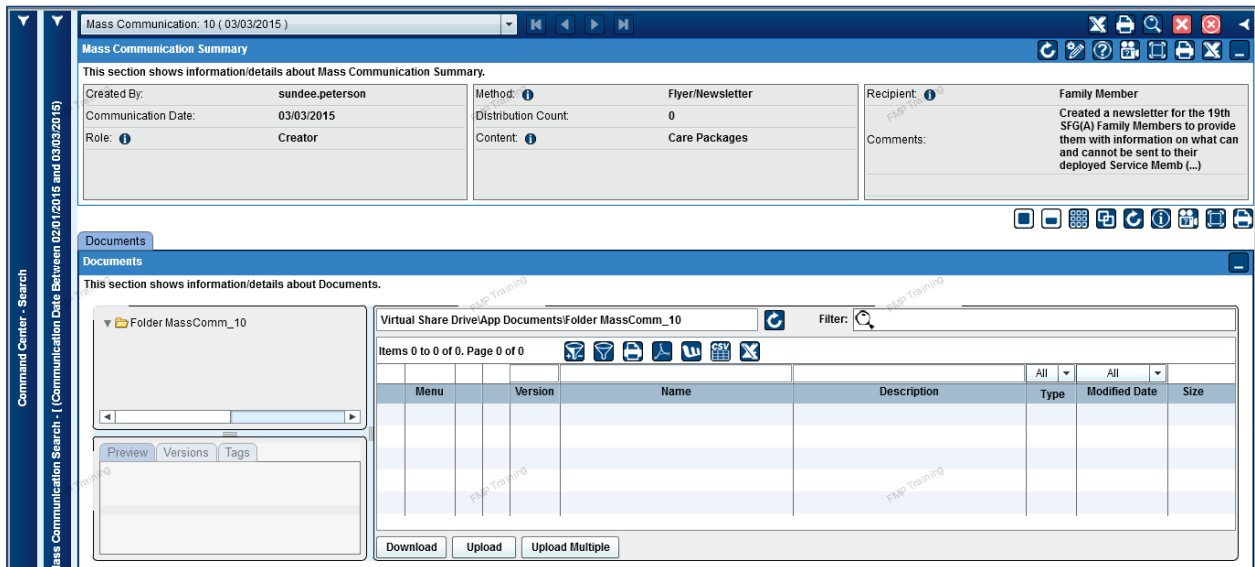   a. Created By
   b. Communication Date
   c. Method
   d. Role

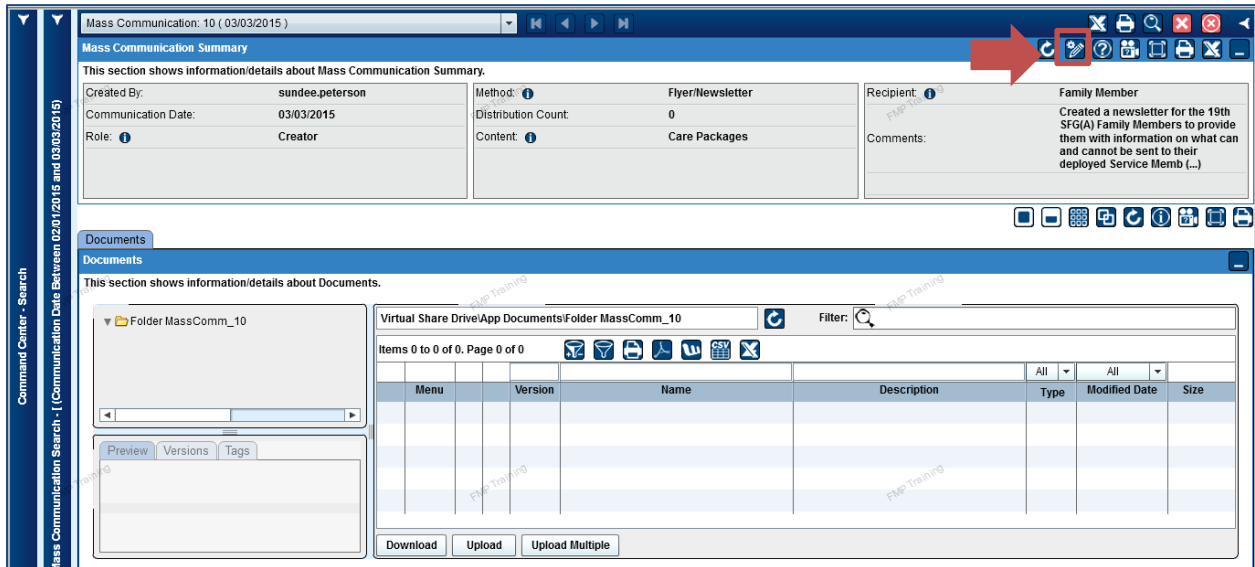3. The **Search Results** will display in the 2nd panel. Click on a specific record to access the record.
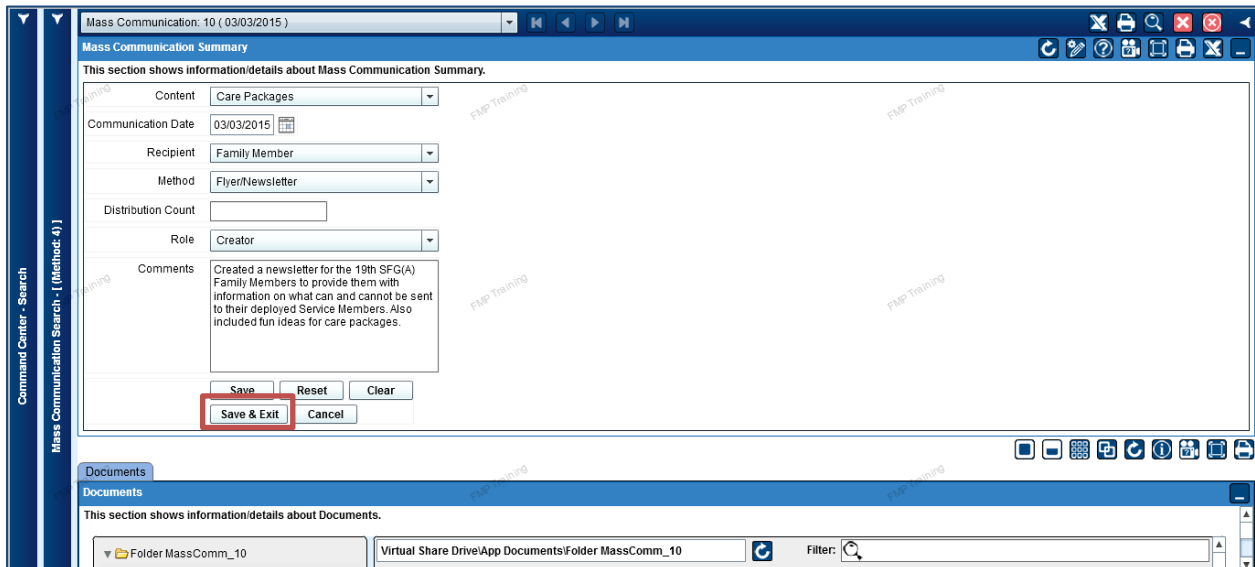

4. The **record will open** in the 3rd panel.

Editing a Mass Communication Record

To edit a Mass Communication record, follow the steps below:

1. Locate and open the Mass Communication record, then select the **Edit icon** to open the record summary for editing.

2. **Make changes** as desired, then select **Save and Exit** to return to the standard record view.

Family Management Program (FMP)
SERVICE MEMBER MANAGEMENT

April 2015

Family Management Program (FMP)
SERVICE MEMBER RECORD OVERVIEW

The records of Army National Guard Service Members are updated daily in FMP. Information comes from the G1 Data Warehouse. Only Army National Guard Service Member data is updated. G1 data goes back 10 years. If a SM separated/retired from the Guard over 10 years ago, then the system will no longer be updated with G1 information. Other Branch of Service information is not currently available. This section provides information on the parts of a Service Member's record.

Searching for a Service Member Record

1. From the Command Center – Search, select Service Member Search. The search criteria options are displayed.

2. In Full Name, type the SM's last name and first name with no comma separating the two. Capital letters are optional. If you are not sure of the exact spelling, the Sounds Like box.
   Example: Ruble Barney

3. The display on the left shows all the search options. Selections with dropdown arrows offer a list of items to choose. Information may be typed in boxes without a dropdown arrow.

4. Complete your selection(s) and click on the Save button.

Result display as shows as below:

To access the Service Member's record, hover the cursor over the row you wish to select, and then left click your mouse.

Summary

The Service Member's record is divided into sections. The first section is the Summary. The various display items are shown below:

- If Assigned shows No, then the SM is not currently in the Guard.
- If Assigned shows Yes, then the SM is currently in the Guard.
- If Record from ARNG Databases of Record shows No, then the information is not from the G1 data warehouse.
- If Record from ARNG Databases of Record shows Yes, then the information in the record is not from the G1 data warehouse.

Tab Sections

The next section has various items available in tabbed sections. If the SM is currently in the Guard and the record is coming from the G1 data warehouse, then the following tabs display:
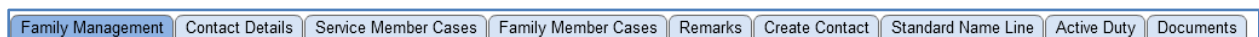
If the record was created by a FAC staff member and entered into the system or G1 military data is no longer, then the available tabs displayed are as shown below:
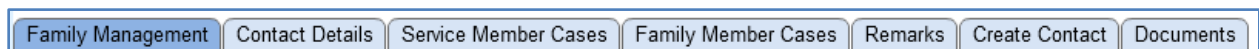
Family Management Tab
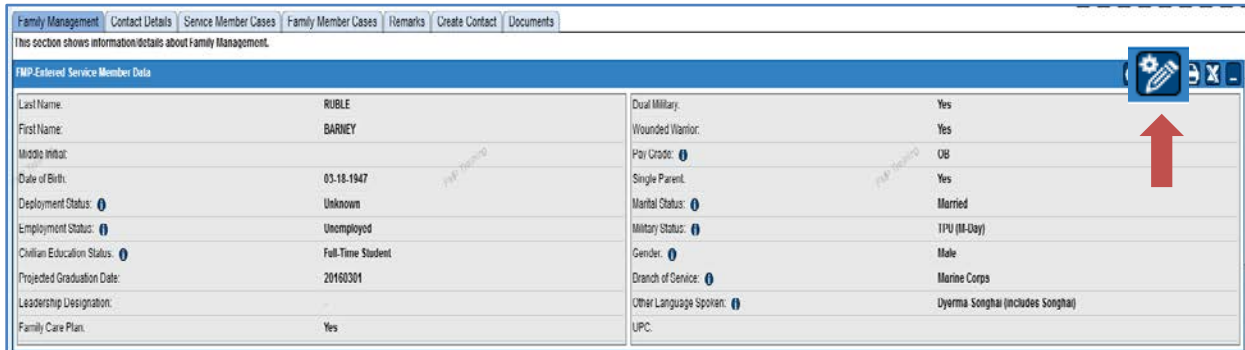
The first section of the Family Management tab is FMP-Entered Service Member Data. This information can be updated by clicking on the edit icon in the right corner of the section.

Items with a dropdown arrow have a list of items that can be selected. Date selections can be made by clicking on the pop-up calendar and selecting the necessary date. Click Save & Exit after making any updates to the record.

If the changes were successful, a pop-up appears notify you. Click on OK to go back to the record.

Family Member information is displayed next. A new record can be added by clicking on Add Family Member. Scrolling toggles are seen throughout the system. In this section, there are two scrolling bars on the far right side and a scrolling bar at the bottom of the section.

Other information displayed below this section includes Outreach and Cases.

Contact Details Tab

There are two sections within Contact Details. Only the FMP data section can be edited. If the Official G1 data is correct, then no information needs to be added to the FMP Data section. When a SM provides new address and/or contact information, edit the FMP Data section. Editing this section will not update the Official G1 Data.

Service Member Cases Tab

This tab has a history of SM cases, and it is where you add a new case on a SM.

Case history information display

Family Member Cases Tab

The Family Member Cases tab has a history of cases on FM's. To access a case, click on the item.

Case history information display

Remarks Tab

The remarks tab can be used for documenting information in the system that is not a case, contact, or outreach. To add a Remark, type information in the box and then click on Add Remark.

Type comments in this section.

Create Contact Tab

The Create Contact tab is used to document a contact made to a SM.

Standards Name Line Tab

This section provides military information on the SM. It cannot be edited. It is only available on the record of a current Guard Member with information from the G1 data warehouse.

Active Duty Tab

This tab is only on the record of a SM with G1 data. It provides AGR pay information, Active Duty Tours, and date of record update information.

Documents Tab

This section of the system can be used to hold documents that pertain to the SM such as a Family Information Sheet.

Family Management Program (FMP)
ADDING A NEW SERVICE MEMBER

In FMP, you should NEVER enter a current Army National Guard Service Member. The system receives G1 data updates daily. Before adding a Service Member, always perform a search first.

1. From the Command Center, do a Service Member search by typing in the name of the Service Member. Click Search. The system will check all records for a matching name.

2. If there is no match, the following message will be displayed. Click OK.

3. There are two options for adding a Service Member: with an SSN or without SSN. If you do not have an SSN, check the box in front of "SSN not provided" and click Next. If you have the SSN, then type the SSN in the box. The formatting for the SSN is without dashes.

If you have a Service Member's SSN, then from the Landing Page, click on the "Add Service Member" tab. Fill in the SSN section and then click NEXT. Remember do not include dashes in the SSN.

4. A new "Add NON-ARNG Service Member" screen then displays. There are two tabbed sections to complete: PERSONAL DETAILS and CONTACT Details. Complete as much information on the form as possible. Some items are dropdown selections. Complete both the PERSONAL DETAILS tab and the CONTACT DETAILS tab and then click SAVE.

   NOTE: *Asterisked items must be completed or the document will not save. For Date of Birth, an update will be made in the system adding UNKNOWN as a selection if you do not know the SMs actual date of birth. Until UNKNOWN has been added, the SMs actual date of birth must be entered.*

The new Service Member's record will then be created. This record will look like other Service Member records except G1 data will not be available. Once the record has been created, add Family Members and cases as needed.

Dropdown Selection Items

There are various dropdown selection items in the form. Click the carrot arrow in the selected box. This will give you a listing of all items in the selection box. If you have the information, make a selection. If you do not have the information, then skip that item. HOWEVER, if there is a red asterisks in front of an item, then that section must be completed in order to save the entry.

*Required Field

Marital Status	Blank Annulled Divorced Interlocutory Decree Legally Separated	Married Single Widowed Unknown	
Pay Grade	Enlisted Ranks E1 – E09 Office Ranks O01 – O10 Officer Prior Service O1E – O3E Warrant Officer W01 – W05		
Primary Language	The languages are listed alphabetically.		
Employment Status	Full-Time Employed Part-Time Employed	Retired Unemployed	
*Branch of Service	Army National Guard Army Army Reserve Coast Guard Coast Guard Reserve	Air National Guard Air Force Air Force Reserve Marine Corp Marine Corp Reserve	NOAA Navy Navy Reserve USPHS
Gender	Blank	Female	Male
Unit	Listing of Guard units in the state or other units entered into the system.		
Civilian Education	Not Student	Part-Time Student	
Military Status	Active AGR Combat Veteran Deceased	Discharged ETS KIA Retired	TPU (M-Day) Veteran

NOTE: You should never enter AGR or TPU Service Members in the system.

Family Management Program (FMP)
FAMILY MANAGEMENT

April 2015

Family Management Program (FMP)
FAMILY MEMBER RECORD OVERVIEW

Family Member record information does not come from the G1 Data Warehouse. Family Member records and updates are entered and updated by FAC staff.

Searching for a Family Member Record

1. From the Command Center – Search, **select Family Member Search**.

2. To search for a **specific FM record**, type the last name of the FM in the Family Member Last Name box. Then type the FM's first name in the Family Member First Name box. If you are not sure of the exact spelling of the FM, click the Sounds Like box and type the name how it sounds.

3. **Select other criteria** in the list if necessary to narrow your search.

4. Once items have been selected, click **Search**.

5. The results will display in the panel on the right.

Access a Family Member Record

The display results appear in the Landing Page section on the right of the Command Center. To access the record of the Family Member, hover over the record and click.

The record information then displays as shown below. The Service Member record is on the left in the third panel and the Family Member information is on the right in the fourth panel.

| 3rd Panel – SM Record | 4th Panel – FM Record |

Relationship Summary

The information can be updated by selecting the edit icon.

Family Member Information and Editing

Family Member Information tab provides contact information and other detailed items on the Family Member. The information may be updated from this tab. Click on the edit icon to update/change the Family Member information.

From the edit screen, update any information. Once all changes have been made, click Save & Exit.

A Success message will appear saying the record was successfully saved. Click OK to return to the FM record screen.

Create Case Tab

The Create Case tab is used to add a case to the FM's record. For additional information and instruction on "cases", review the Cases handout material.

This tab also displays a list of all the cases for the selected Family Member. To access the case, move your cursor over the case you wish to access and then click. The case will then populate in the 4th panel.

To add a case, from the dropdown arrow, click Case and then click Add Record.

All ▾
All
Case

Add Record

Create Contact Tab

To create a contact with a FM, click on the Create Contact tab. Select the Contact Category and then click Create Contact. For additional information and instruction on "contacts", review the Contacts handout material.

A history of all the communications with the FM is displayed.

Family Member Information	Create Case	Create Contact

Create Contact   ▬

Create Contact   ▲

Contact Category: ✳ | Please Select ▾ |

Current FAS: ✳ AR4

Create Contact

Items 1 to 2 of 2 ⏮ ◀ ▶ ⏭

Case ID	Created Date	Contact Category	Contact Parent Type
703642	2015/03/19	Routine	Family Member
703641	2015/03/19	Routine	Family Member

Accessing a Family Member Record from the Service Members Page

A Family Member record may also be accessed from the Service Member page. Hover your cursor over the FM you want to access and click. The FM record will display in the fourth panel on the right.

3rd Panel – SM Record

4th Panel – FM Record

Family Management Program (FMP)
ADDING A NEW FAMILY MEMBER

All Family Members in FMP must be tied to a Service Member. To add a new Family Member record in FMP, follow the steps below:

1. Open the Service Member's record and then click on **Add Family Member**.

2. A pop-up appears in the middle of the screen.

3. From the dropdown list, select the **FM's relationship** to the SM. You can also identify the FM as a Primary Contact, Emergency Contact, or Evacuation Contact by clicking the box in front of the item.

Relationship Types

Aunt	Father-in-law	Other
Boyfriend	Friend	Significant Other
Brother	Girlfriend	Sister
Brother-in-law	Grandfather	Sister-in-law
Cousin	Grandmother	Son
Daughter	Guardian	Step-Daughter
Domestic Partner	Husband	Step-Father
Ex-Husband	Mother	Step-Mother
Ex-Spouse	Mother of Child	Step-Son
Ex-Wife	Mother-in-law	Uncle
Father	Nephew	Wife
Father of child	Niece	

- A Primary Contact is the main Point of Contact or POC for the SM.
- An Emergency Contact is a person who is designated as a contact in case of an emergency situation with the SM.
- An Evacuation Contact is the person who would be contacted in case the SM and his FM had to evacuate from his/her home of record.

4. Once the information is entered click on **Search**. If no results are available, then the Add New button will appear as an available option.
   a. There are two possible family member areas: Non-Service Members and Service Members.
   b. If a person with the name you have entered is in the system, his/her name will appear in the appropriate section. Review the information and verify the address, city, and state are correct for the person you are trying to add to the SM's record.

5. If none of the items displayed are correct for the person you want to add to the SM's record and then click on **Add New**.
   a. In the example below, Betty Ruble is being added as the Wife and a POC. Her address is also the same as her spouse's.

6. Complete the **Contact Information** on the new Family Member. You will have to re-type the FM's name.

   a. If the FM has the same address as the SM, click the **Copy Service Member Address** box to automatically fill in the address information.
   b. When adding the Zip/County/City/State information, **begin typing the zip code**. City, county, and state information will begin to display. Select the correct zip code and the form will then autofill.
   c. **Phone numbers** throughout FMP are not formatted with hyphens.

7. Once your information is completed, click the **Save** button.

8. If the address information is copied from the SM record, the following message appears:
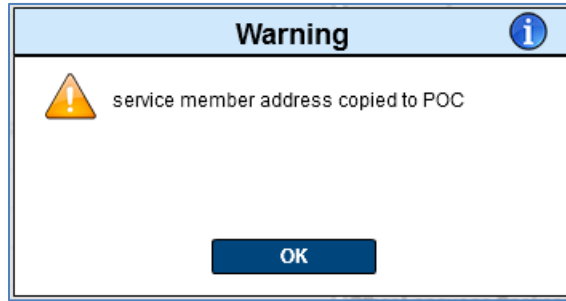
9. The **new Family Member** now appears in the Family/Relationships section of the SM record.

Removing Family Members

A Family Member may be removed from the Service Member's record. Before removing a FM, consider your reason for removing the person. If the person is a parent of a child with the SM, then change the relationship status of the FM but do not remove the FM. If there are cases or outreach associated with the FM you want to remove, you will not be able to remove the record.

1. To remove a record, click on the **Remove** tab in front of the person's name. The record will no longer be displayed on the Service Member's page.

Family Management Program (FMP)
OUTREACH

April 2015

Family Management Program (FMP)
OUTREACH GUIDELINES

Overview and Definition

An *Outreach* is a record created when well-being contact is made to a Family Member(s) who has a Service Member deployed or mobilized over 31 days. The record includes the range of dates where well-being contact is made on a monthly basis. Outreach is considered successful when two-way communication has occurred. Otherwise, it is considered an *Outreach Attempt*.

Outreach is a requirement of Family Assistance staff. The intent of Outreach is to check on the well-being of all Army National Guard Family Members who are impacted by mobilization or deployment. Wellbeing checks made during mobilizations, WTU assignments, natural disasters, etc. are documented as a Contact in the Contact section of FMP.

When thinking about outreach, think customization. Think individualization. Outreach is an opportunity to build a stronger relationship with families. It's an opportunity to build trust. By building trust the families will naturally come to the FAC for assistance.

Listed below is the National Guideline for Successful Outreach. States and Territories can refine or add to this guideline, but cannot take away from the intent. For example: Some states will only accept phone calls as acceptable outreach. Always follow the guidelines of your leadership.

Identifying the Main Point of Contact

To identify a Family Member who requires outreach you must assign them as a primary contact in the Service Members record. Outreach Requirement dates must also be set.

One person per deployed Service Member must be identified for outreach purposes. A Service Member will normally identify who his/her main Point of Contact (POC) will be (i.e. spouse, parent, close friend).

Generally speaking:

- If married, the spouse should be listed as the POC.
    - Significant others and partners are also included.
- If single with no dependents, a parent or a sibling may be listed.
- If they have no living relatives a close friend or designee may be listed.
- If a parent with dependents not living with them, the children's guardian should be listed in addition to the primary Point of Contact, due to dependent benefit eligibility.

These situations are reviewed on a case-by-case basis and should have the SFPDs involvement.

You may contact multiple Family Members for the same Service Member each month. However, only the main POC is included in the 100% outreach requirement.

- For example: During an SRP (Soldier Readiness Processing), the SM may ask you to contact his father as well as his wife. The wife and father may not have a particularly strong relationship, and the SM would appreciate the FAC's checking on his father. We would absolutely want to do this for a Family.

For guidelines on contacting multiple Family Members, contact your leadership chain (i.e. FAC Coordinator, SFPD).

No Contact Requests

A Service Member cannot elect a Family Member to be exempt from outreach. Only the Family Member can request no contact and their request should be honored.

- Reference: *Official Communications in Support of Family Readiness* Memorandum, GEN Rick Lynch

Non-contact requests may be made verbally or in writing and should be noted in FMP in the Outreach record for each month where outreach is required.

Outreach Timeframes

Initial Family Member contact should occur prior to the Service Members departure, where possible. This may be done in the form of an introduction letter.

Monthly outreach is conducted on an ongoing basis until the Service Member returns home. After their return, communication is documented as a "Contact".

- Outreach is documented through the end of the month the Service Member returns. If you are contacting the Family the following month, it is documented as a Contact.

Outreach Methods of Contact

It is the preference of NGB for Outreach to be completed via the phone. Once contact has been attempted via the phone, the FAS may utilize email, letter, text, or social media for outreach.

The use of email, letter, text, and social media outreach is prohibited as initial or standalone outreach *with the exception* of those Family Members who have specifically requested an alternate method of Outreach and for those States where Family Members who do not have access to phones (such as remote areas of Alaska). This can be monitored or determined necessary by the FAC Leadership and/or the SFPD.

Mass telephonic messaging systems are not allowed for outreach.

Outreach/Wellness calls will ONLY be conducted by the Family Assistance Centers to ensure Families are not overwhelmed during their Service Members mobilization/deployment.

Methods of Contact

Phone Call

- Phone contact is successful if the FAC spoke to the Family Member directly or received a return call from the Family Member.
- If you spoke with a Family Member it is actioned in FMP as "Successful Communication" with the appropriate action (issue/no issue) selected.
- If you are not able to "connect" with the Family Member it is actioned in FMP as "Communication Attempted – Awaiting Response".
    - If another Family Member other than the indicated POC answers the phone and you speak with them, you record the contact with that individual and will still need to contact the POC listed.
- Mass telephonic messaging systems are not allowed for outreach.

Email

- Individual, customized emails (i.e. Dear Mike) can be counted as outreach when the content is well-being related.
- A copy of the email may also be uploaded under the outreach document tab.
- If you send an email to a Family Member it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.

In-Person

- Face-to-face contact must be personal and verifying the well-being of the Family to be considered outreach.
- Presentations at events (i.e. Yellow Ribbons, Job Fairs, FRG meetings) do not count as a successful outreach as presentations are not private conversations.
- If you made in-person contact with a Family Member it is actioned in FMP as "Successful Communication" with the appropriate action (issue/no issue) selected.

Letter

- Customized letters (i.e. Dear Sue) can be counted as outreach along with hand-written notes when the content is well-being related. Mass emails and newsletters DO NOT count as outreach.
- A copy of the letter may also be uploaded under the outreach document tab. This is not mandatory.
- If you send a letter to a Family Member it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.
    - Certified letters are not considered two-way communication.
- Introduction letters may be sent to Family Members prior to the first month's required outreach.

Social Media

- Social media can be used to contact Family Members as long as it is a private, customized message to the Family Member.
- Comments and posts to Family Member entries do not count as outreach.
- If social media is used to contact a Family Member it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.

Text

- Texting can be used to contact Family Members as long as it is a private, customized message to the Family Member.
- If texting is used to contact a Family Member it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.

Do Not Contact

- If a Family Member prefers not to be contacted on a monthly basis their request should be respected. Inform the FACC and SFPD and document the Family's request in the FMP for each month where outreach is required.
- Document in the system each month where outreach is required that the Family does not want to be contacted.
  - Select "Do Not Contact" to action and close the Outreach for the month.

Family Management Program (FMP)
OUTREACH RECORDS

Outreach Requirements

An Outreach "requirement" is entered for each FM who will be contacted for outreach/well-being check purposes.

- To add a requirement, select "Add Outreach".

Add Outreach	Remove	Name
Add Outreach	Remove	Peterson, Sundee

The requirement is set when dates have been entered and saved for the time period outreach is required (i.e. duration of deployment).

Time Period Outreach Is Required

Start Date: _____

End Date: _____

Submit

The same outreach record is used the entire time the service member is deployed.

Once a "requirement" has been entered, FMP will run a monthly "cycle" on the outreach. This is based on a calendar month vs. 30 day increments.

The system will "Close" the outreach on the last day of the month for the "End Date".

Note: although more than one staff member can document outreach in the same outreach record, the record will reside in the work bucket of the individual who initiated the outreach requirement.

Outreach Work Bucket

At the beginning of each month, all FMs with a requirement will populate in the Outreach Work Bucket - for the user who initiated the outreach requirement - under "Open".

An "Open" status means an outreach requirement has been added for an individual, but it has not yet been actioned for that calendar month.

"Closed" status means the outreach requirement dates have expired.

As staff members work their Outreach, the "open" bucket number - shown as (#) - will decrease as the other three buckets populate; Pending Response, Response w/Issue, Response w/out Issue.

Specialist view:
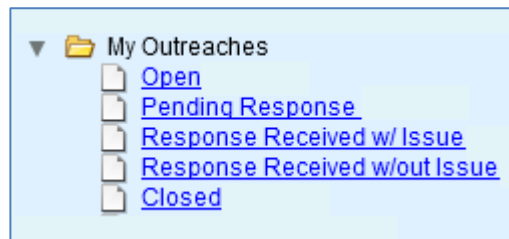
Coordinator view:
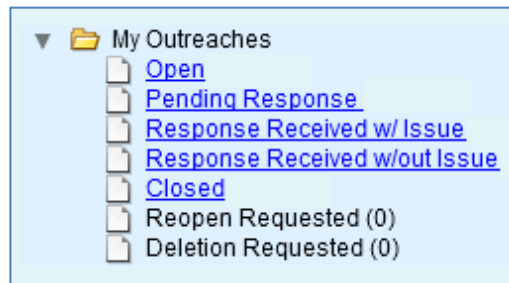
At the end of the month, the system will close out all outreach for that month.

On the first day of the month, the system will repopulate the "open" bucket.

Outreach Actions

You can access an Outreach record two ways: through the work buckets or by selecting the Outreach record from Outreach section. This is located at the bottom of the Family Management tab in the Service Member record.

Outreach			
Input Filter	*Input Filter*	*Input Filter*	*Input Filter*
Case Code	**Last Attempt Date**	**Last Attempt Method**	**Related Contact Name**
OR-2013-102610	06/16/2014	Call	▬▬▬▬

After you have selected the Outreach record, a fourth panel will populate. In the fourth panel, you will enter the date, method and comments, prior to performing an "action".

FIRST ATTEMPT IN A MONTH

For the first outreach attempt of each month to a Family Member, a phone call is the preferred method. After the phone call, you select an action to note whether you made contact and whether there were any issues.

- If the individual prefers another form of contact, select "call", indicate this in the comments then select "communication attempted". You can now document another outreach attempt and document the method used.

- If the individual prefers no contact, select "Do Not Contact", indicate this in the comments then select "communication attempted".

- "Successful Two-Way Communication (with or without an issue)" should only be selected if two-way communication occurred.

- "Communication Attempted" is used if you were not able to have two-way communication. For example: left voicemail, sent email, disconnected number, etc. If/when a reply is received you are able to document another outreach and select the appropriate "Successful Two-Way Communication" action (i.e. with or without a reported issue).

If you're unable to reach the Family Member in the initial phone call, you must then make subsequent attempts to contact them and document these subsequent attempts.

Once an outreach attempt is successful, you select an action to note whether there were any issues.

ERRONEOUS ENTRIES

If an outreach attempt was erroneous you can request that it be removed. When you select this option, it will populate in the FAC Coordinator work bucket for them to action.

Outreach to Service Members

The system is not designed to document outreach to Service Members. This is recorded as a *Contact* in FMP. Refer to the Contact handout for further information and instruction.
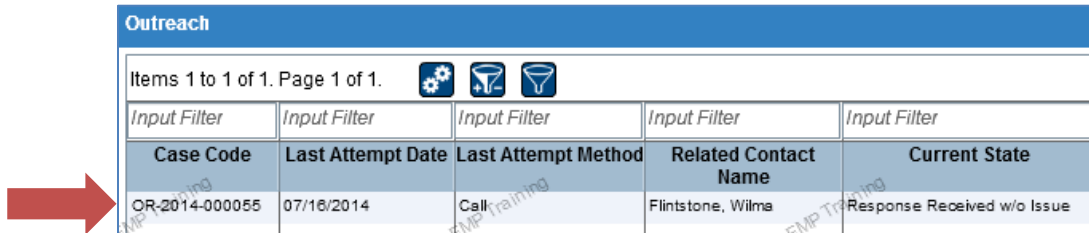
Examples of situations where SMs are contact directly might include:

- WTU Service Members
- Leadership/command driven well-being checks when non-deployed/mobilized.

Editing Outreach Requirement Dates
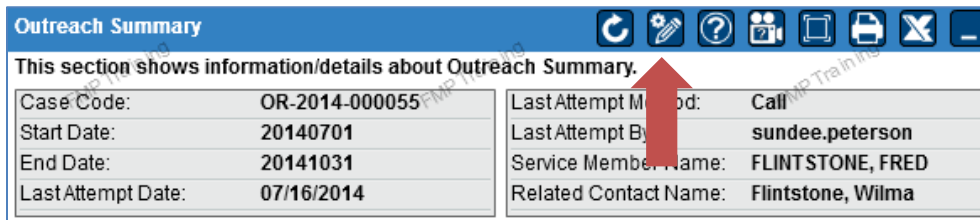
To edit the dates on an existing Outreach requirement:

Select the Outreach Record from the Family Management tab in the Service Members record.

Select the "edit" icon, located in Outreach Summary on the 4th panel.

Manually enter in the correct dates. Then select "Save & Exit".

You will get a Successfully Saved alert. Click "OK".
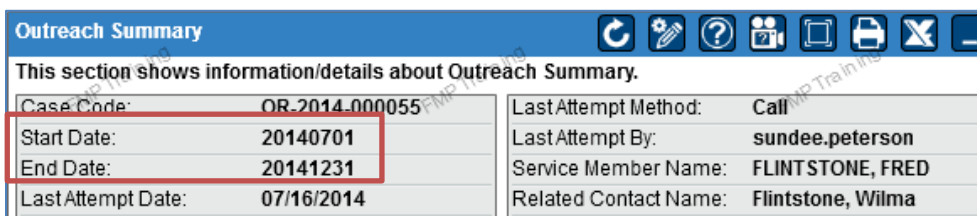
Record will now display the edited dates.

In Person Outreach Contact

Outreach in person is about the right time and the right place. The scenarios listed below illustrate when in-person outreach may be appropriate. Remember these conversations need to be conducted in the right place (i.e. a private area where others are not able to overhear the conversation and where personal information/safety is not compromised).

- In a public place (i.e. post office, grocery store). The contact must be an outreach conversation versus a "Hello! How are you doing?"
- At an FRG meeting. Make sure you conducting the Outreach away from the other attendees so the Family member is able to speak freely.
- The purpose is to seek out the person at a specific event or meeting to check their well-being (i.e. Yellow Ribbon, Youth Camp).

All of the Examples above are examples of Successful In-Person Outreach's when:

- The primary purpose is a check on their wellbeing
- Conversations are held in private and secure location
- Followed-up with the appropriate documentation in FMP.

Family Management Program (FMP)
OUTREACH TIPS AND DOCUMENTATION

Promoting Two-Way Communication

Asking open ended questions promotes conversation. Experience has shown most issues will be revealed within five (5) questions. Listed below are some examples of questions you can use to encourage two-way communication.   Examples of Open Ended Questions:

1. "When was the last time you heard from your soldier?"
2. "What have you heard from your soldier recently?"
3. "How are your children coping with the deployment?"
4. "Have you had any issues accessing your TRICARE benefits?"
5. "What type of activities have you been involved in during the deployment?"
6. "What have you been talking about at the FRG Meetings?"
7. "What types of extra-curricular activities are your children participating in?"
8. "How are you keeping busy while your husband/wife is away?"
9. "How is school going for your children?"
10. "How are you doing in school this semester?"
11. "How are you coping during this deployment?"
12. "How has this deployment been different from the previous ones?"

Ideas to Open/Engage Conversation

Asking leading questions can also be a good way to begin a conversation, as long as, it is followed up with additional information and discussion.

1. "The weather here has been driving me crazy, how have you been doing with it?"
2. "At this point of the deployment most folks are going a little stir crazy, how have you been doing?"
3. "It was great seeing you at the _____ event! How have you been doing since then?"
4. "Did you hear about the new (library, restaurant, shopping center) they are putting up in your area?"
5. "Did you see the newsletter the FRG sent out this month? What did you think of it?"
6. "Did you get the Youth Newsletter with the camp details? Do your kids want to go to?"
7. "Last time we spoke, you were _____. How's that been going?"
8. "Were you able to get a copy of the book for parents of deployed soldiers?"
9. "Do you know other parents of deployed soldiers?"
10. "How have you been engaged with other parents of deployed soldiers?"

Examples of Outreach Conversations

When contacting a Family Member to perform an Outreach, it is important your primary intent is to check on the well-being of the Family Member. Below are examples of different outreach scenarios.

Successful Phone Contact with No Issues

In this example Outreach there are no reported issues in the conversation.

FACS: "Good afternoon, my name is_____, and I am calling with the Mississippi National Guard Family Assistance Center. I will be contacting you on a monthly basis during your Service Members' deployment to ensure that you and your Family are doing well and answer any questions you may have.

Also, if you come across any problems or concerns, I will be happy to help and provide resources that may be able to assist you. Do you have any questions or concerns today?"

FM: Not today, but I appreciate your call.

FACS: "Great. What were some of the things you learned at the Yellow Ribbon event?"

Continue asking open ended questions to engage her in conversation. For example:
- Is there a good time for me to contact you each month?
- Since you are working days, would you mind if I called you in the evening?
- How often do you think you and your soldier will be communicating?
- What form of communication are you planning on using? Do you have Skype set up on your computer so you can talk? Letters?

FACS: "Before we finish here, do you have my information just in case you do have any questions?"

FM: "Yes I do! Thank you!"

FACS: "Great! I'm really excited to get to know you over the next few months! I will contact you again next month. Have a great day!"

Example Documentation for FMP:

"I contacted Mrs. Jones for her monthly wellness check. I asked how the children were coming along in school and she said that James had made the honor roll. She said everyone was doing great and she has good support from her FRG. I told Mrs. Jones I would call again next month."

Successful Phone Contact with an Issue

In the example listed below, the Family Member revealed a few issues during the conversation. It is vital we carefully listen to what the Family Member is saying to ensure there are no additional underlying issues.

In this case, after entering the details in the outreach comments section, you will open a case; document the case, provide resources and follow-up.

FACS: "Good Afternoon Mrs. Jones. This is Tammy with the Family Assistance Center. How are you doing today? Do you have a few minutes to talk?"

FM: "I'm doing "ok". Yes I guess I have a few minutes to chat."

FACS: "How are you and your children doing? Didn't Johnnie break his arm last month?"

FM: "Thank you for asking! His arm is ok. He gets his cast off next week, but he has started to have a few behavior issues. His grades have dropped a little as well."

FACS: "Well, I'm glad he will be getting the cast off soon but I am sorry to hear he is struggling. We have a great Child and Youth Counselor to assist with those types of issues. Would you like that information?"

FM: "I am not sure we are to that point quite yet."

FACS: "I understand. If anything changes and you would like him to see a counselor, just let me know. Her name is Mary and she is a licensed counselor who specializes in children's issues. There is also a grant for free tutoring if you are interested."

FM: "The tutoring would be great! Maybe that will help bring his grades up. How do I apply for this grant?"

FACS: "The grant is available through the _____ program. It is good for 6 months of free tutoring. All you need to do is download the application from their web site. All of the instructions are listed there. If you need any help with it, just let me know. The web address is _____."

FM: "Thank you so much for this information! I will fill out the application this evening!"

FACS: "You are very welcome! Have a great afternoon. I will call you again in a few days to make sure you were able to submit the grant. If you need anything before then, please call."

FM: "I will! And thanks again for calling. Bye"

Example Outreach Documentation for FMP:

"I contacted Mrs. Jones for her monthly wellness check. I asked how her son's arm was and she stated the cast was coming off, but he was having some issues in school and with his behavior. She declined counseling at this time, but was interested in the Military Kids Grant for tutoring. I gave her website and application information and she stated she would follow up on it today. Additional follow up details are noted in the case."

Outreach Contact Using Email/Letter

In the example listed below, the Family has requested email/letter contact only.

	To...	Mrs. Jones
Send	Cc...	
	Bcc...	
	Subject:	Family Assistance

Good Morning Mrs. Jones!

Just a small note to see how you are doing since your husband, SGT Jones has been deployed. Are you able to hear from him often? I k now that can be such a challenge! Lat month, you mentioned you decided to take a few classes while your husband was deployed. How are your classes at the community college going?

Were you able to attend the FRG meeting last week? I know it may be difficult as you are taking night classes. Please let me know if you have any questions or if there is any way we can assist you.

It would be greatly appreciated if you could send me an email to let me know how you are doing. I look forward to hearing from you soon!

Respectfully,
Suzie Specialist

Suzie Specialist
HRCI Contractor
Family Assistance Specialist
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Example Outreach Documentation for FMP:

"Per Family request, email outreach was conducted. I asked Mrs. Jones if she had heard from her spouse recently and how her classes at the college were going. Inquired as to whether or not she was able to attend any FRG events. Gave her my contact information, should any issues arise."

Note: You may also copy and paste the email into the comment section or save it as a document and upload it.

Proper Documentation in FMP

FMP is a National Guard data management system Family Assistance staff use to track assistance, support, and activities they provide. Authorized State and national leadership have access to view records as needed. It is vital to document in a professional manner. This includes, but is not limited to, the proper use of grammar (i.e. complete sentences), spelling, etc.

In addition, FAC staff may need to assist or cover for one another and good documentation gives insight when conducting outreach or working a case. All data is permanent once saved into FMP.

Examples of Appropriate/Inappropriate Documentation (taken directly from GFMS/FMP)

Illustration A
Improper: "number disc."

Proper: "The phone number listed for this Family has been disconnected."

Illustration B
Improper: "all is well. same old stuff :)"

Proper: "Performed monthly outreach call to SM's mother Ruthie at above number. Discussed current Family situation relative to SM's mobilization to determine if any needs or issues exist. Ruthie stated that everything is going well. SM is actually home on R&R right now until 18 FEB. They are enjoying their time reconnecting and Ruthie denied any Family needs at this time. Emotional support provided and ensured Ruthie has my contact information for future reference. No further needs have been identified at this time; will follow up again with Family Member within 30 days."

Use caution and/or refrain from the following:

- Uncommon acronyms may only make sense to you (i.e. TP for telephone versus toilet paper).
- Religious undertones may violate EEO and Ethical standards.
- Negative comments about the individual. Example:
    - Appropriate: "FM verbalized her frustration we cannot fund her auto repairs"
    - Inappropriate: "FM is very rude and yelled at me."
- Detailed medical issues. Example:
    - Appropriate: "SM is having medical issues at this time"
    - Inappropriate: "SM has been diagnosed with breast cancer and had a mastectomy"

Family Management Program (FMP)
CONTACTS

April 2015

Family Management Program (FMP)
CONTACT GUIDELINES

Overview and Definition

A *Contact* is a record created when non-deployment related contact is made to Service Members, Family Members and Community Resources, with any frequency, for reasons not related to Outreach or Cases.

Contacts made to Service Members and their Families allow FAC staff additional opportunity to build stronger relationships and trust.

Listed below is the National Guideline for Contacts. States and Territories can refine or add to this guideline, but cannot take away from the intent. For example: Some states will only accept phone calls as acceptable contact methods. Always follow the guidelines of your leadership.

Contact should be documented under the record of the individual or organization you are contacting. For example: if you are speaking to a Family Member, you document the Contact in the Family Members record.

No Contact Requests

Although a state/territory may request contact be made to Service Members and their Families, not everyone will want to be contacted. In these instances, the SM/FM request should be honored and noted in FMP. An example of this would be extending wellbeing contact post-deployment where the Family has requested no contact.

Contact Category Types

The Contact type or *category* should describe the purpose of the contact with the person.

SM/FM Contact Categories:
- Disaster/Tragedy Check-up
  - Used to check on the wellbeing of Service Members and/or their Families after a local or state disaster or tragedy. This may include, but is not limited to, the following: flooding, earthquake, fires, school shooting, tornado, hurricane, act of terror, etc.
- Military Schools/Training
  - Used to provide information to and check on the wellbeing of Families while their Service Member is engaged in military school or training (i.e. MOS training, AT).

- Post-Deployment
    - o Used to document wellbeing contact made to Families after the return of the Service Member (i.e. post-deployment). Many states continue to contact Families up to a year after the Service Members return (i.e. 30/60/90/180/365 days).
- Routine
    - o Used to document contact with Service Members and their Families that does not fit into the other categories.
- RSP (Recruit Sustainment Program)
    - o Used to document contact made to Families and Service Members who are in the Recruit Sustainment Program.
- Service Member Mobilized
    - o Used to document wellbeing contact made to Families while their Service Member is mobilized. These are normally under 31 days. If longer than 31 days they should be tracked under Outreach and have a date-range requirement.
- Transitioning Active Duty to Civilian
    - o Used to document contact made to Service Members and/or their Families who are transitioning from Active Duty service to civilian life.
- WTU (Warrior Transition Unit)
    - o Used to check on the wellbeing of Service Members and/or their Families who are attached to a WTU.

Community Resource Contact Categories:

- Event/Project Planning
    - o Used to document interactions with resources that is specifically related to events and projects (i.e. Job Fairs, Holiday adoption). Note: The events themselves as documented as a Site Visit.
- Networking
    - o Used to document general contact with Community Resources and their POCs.

Contact Timeframes

Contact timeframes will vary depending on the type of contact being made and the requests of state/territory leadership. Examples are listed below:

SM/FM Contact Timeframes:
- Disaster/Tragedy Check-up
    - o One time check to assure individuals are safe and sound. If assistance is needed, a case(s) is generated.

- Military Schools/Training
  - Done for the length of training or school (i.e. 3 weeks vs. 6 months).
- Post-Deployment
  - May be ongoing up to a year after the Service Members return depending on state/territory preferences (i.e. 60/90/180 days or annual).
- Routine
  - Typically a one-time contact.
- RSP (Recruit Sustainment Program)
  - May be ongoing while the Service Member is in the Recruit Sustainment Program.
- Service Member Mobilized
  - May be ongoing for a short period of time while the Service Member is mobilized.
- Transitioning Active Duty to Civilian
  - May be ongoing for a short period of time (3-6 months) as transition occurs.
- WTU (Warrior Transition Unit)
  - Ongoing until the Service Member is no longer assigned to a WTU. This may be 30 days up to several months or years.

Community Resource Contact Timeframes:

- Event/Project Planning
  - May be ongoing for a short period of time leading up to an event or project completion.
- Networking
  - Typically a one-time contact, but may have several separate entries (i.e. initial introduction, routine network call).

Methods of Contact

The use of phone, email, letter, text, and social media may be used for Contact purposes, however, the purpose of the contact should be considered when choosing the best method. For example, if the contact is an extension of Outreach (i.e. post-deployment) a phone call is preferred as it encourages stronger two-way communication.

Contacts will ONLY be conducted by the Family Assistance Centers to ensure continuity with our Families and Service Members.

Phone Call

- Phone contact is successful if the FAC spoke to the individual directly or received a reply from them.

- If you spoke with an individual it is actioned in FMP as "Successful Communication" with the appropriate action (issue/no issue) selected.
- If you are not able to "connect" with the individual it is actioned in FMP as "Communication Attempted – Awaiting Response".
- Mass telephonic messaging systems are not allowed for Contact purposes.

Email

- Individual, customized emails (i.e. Dear Mike) can be counted as a Contact when the content is well-being related vs. a case or outreach.
- If you send an email to an individual it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.

In-Person

- Face-to-face contact must be personal and two-way communication vs a quick hello.
- Presentations at events (i.e. Yellow Ribbons, Job Fairs, FRG meetings) do not count as contact as presentations are not private conversations.
- If you made in-person contact with an individual it is actioned in FMP as "Successful Communication" with the appropriate action (issue/no issue) selected.

Letter

- Customized letters (i.e. Dear Sue) can be counted as contact along with hand-written notes. Mass emails and newsletters DO NOT count as outreach.
- If you send a letter to an individual it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.
  - Certified letters are not considered two-way communication.

Social Media

- Social media can be used to contact Family Members as long as it is a private, customized message to the Family Member.
- Comments and posts to Family Member entries do not count as outreach.
- If social media is used to contact a Family Member it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.

Text

- Texting can be used to contact individuals as long as it is a private, customized message.
- If texting is used to contact an individual it is actioned in FMP as "Communication Attempted – Awaiting Response". Once a reply is received it may be actioned as successful two-way communication.

<u>Do Not Contact</u>

- In situations where ongoing contact is directed by leadership and the individual prefers not to be contacted on a monthly basis their request should be respected. Inform the FACC and SFPD and document the individuals request in the FMP for each month where contact is required.
- Document in the system each month where contact is required that the individual does not want to be contacted.
    - o Select "Do Not Contact" to action and close the Contact for the month.

Family Management Program (FMP)
CONTACT RECORDS

The following handout covers key actions related to performing Contacts. Contacts were designed to allow personnel to record non-deployment related contact made to Service Members, Family Members and Community Resources, with any frequency, for reasons that are not Outreach or Case related.

Adding a Contact

1. Open either a Service Member's record, a Family Member's record, or a Community Resource record.
2. Select the **Create Contact** tab.
3. In the *Create Contact* section, select a *Contact Category*. The *Contact Category* should describe the purpose of the contact with the person.
   a. Disaster/Tragedy Check-up
   b. Military Schools/Training
   c. Post-Deployment
   d. Routine
   e. RSP
   f. Service Member Mobilized
   g. Transitioning Active Duty to Civilian
   h. WTU (Warrior Transition Unit)
4. Click **Create Contact** to open the contact in the fourth panel.

Documenting Contacts

Each time you contact, or attempt to contact, any Family Member, Community Resource, or Service Member with a contact record in FMP, you can select an action to note whether you made contact and whether there were any issues. If your contact attempt is unsuccessful, you can record it and document any subsequent attempts. After you have completed a successful contact, you can choose whether you would like to continue the contact and repeat the contact process in the future, or if you would like to close the contact.

1. Open a contact record from either your My Contacts work buckets or from the Create Contact tab where you created the contact (i.e. SM, FM or Community Resource record). The contact record opens in the fourth panel.
2. Enter the **date** that you attempted the contact.
3. Select the **method** you used from the *Contact Method* drop-down.
4. Enter **comments** about the contact.

5. Select an **action** from the *Available Actions* buttons to note whether you attempted communication and are awaiting a response, or if you had successful two-way communication.
    a. A message appears confirming the action you selected, and an attempt is displayed in the grid below the available actions.
    b. **Note:** Available actions will be slightly different if you are contacting a Community Resource. Because cases are not created for Community Resources, the *Successful Two-Way Communication w/ Issue* and *Successful Two-Way Communication w/o Issue* actions are replaced with just one *Successful Two-Way Communication* action.
6. After you complete successful two-way communication, you must decide whether you would like to *continue contact* in the future, and reach out to the person or resource again, or if the purpose of the contact has been achieved, and the contact can be marked *complete*. In either case, enter a comment, and choose the appropriate action, either *Continue Contact* or *Complete*.
    a. **Tip:** Neither of these actions requires you to enter a date or a contact method as they do not imply that you have contacted the person—they're just designating whether you will contact the person again in the future or not.

My Contacts Work Buckets

Work Buckets have been created for Contacts made to Service Members, Family Members and Community Resources. This will assist users in tracking progress and work accomplished.

To view the results of a Work Bucket, click on the Work Bucket link and the results will be displayed in the results panel.

```
▼ 📂 My Contacts
   📄 Open (2)
   📄 Pending Response (0)
   📄 Response Received (0)
   📄 Ongoing Contact (0)
   📄 Complete (1)
   📄 Request Deletion (0)
   📄 Deleted (0)
```
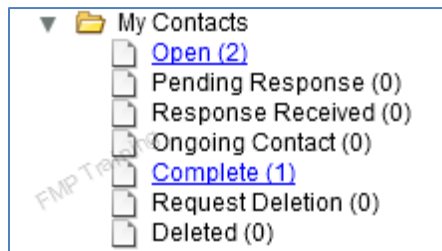
Open – Shows Contacts that were created but not actioned (i.e. Continue Contact or Complete).

Pending Response – Shows all Contacts where the users attempted to contact an individual, but was two-way communication did not occur.

Response Received – Shows all Contacts with successful two-way communication.

Ongoing Contact – Shows all Contacts in the system where the user has requested ongoing contact status. Examples of ongoing contact:

- SMs in WTUs who are being contacted on a routine basis.
- FMs with a SM who is attending military school and families are being contacted on a monthly basis.

Complete – Shows all completed Contacts.

Request Deletion – Shows all Contacts where a request to delete has been issued.

Deleted – Shows all Contacts that were successfully deleted.

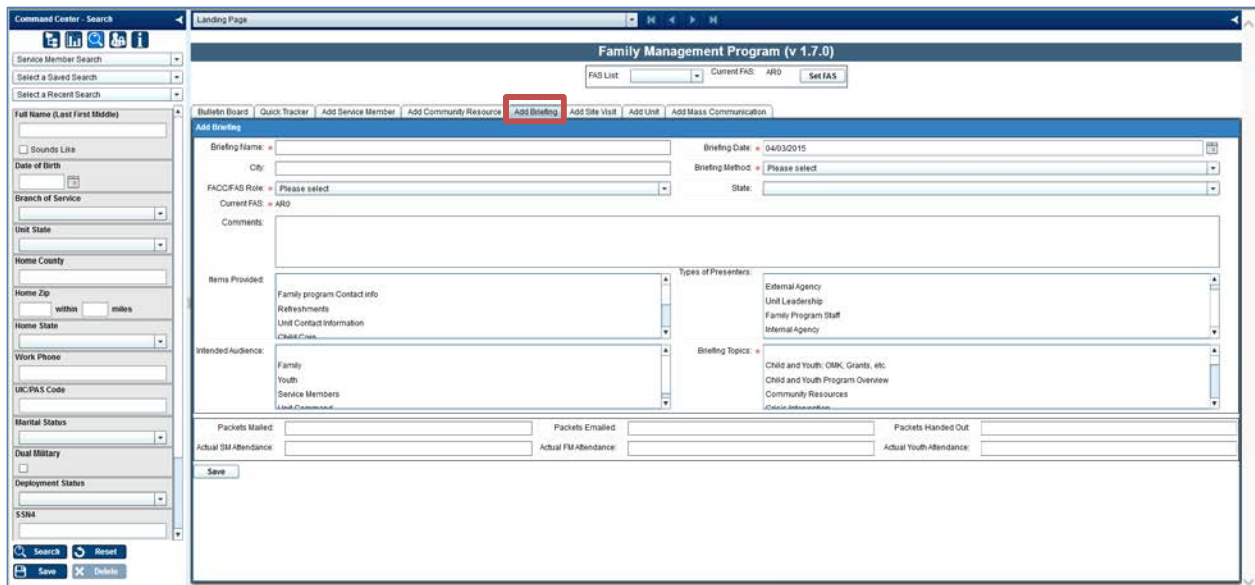# Family Management Program (FMP)
BRIEFINGS

April 2015

Family Management Program (FMP)
BRIEFING RECORDS

Adding a New Briefing

A new briefing is entered into FMP from the Landing Page.

Click the Add Briefing tab. The briefing information form will display.

Asterisked items are required in order to save the document; however, as much information as possible should be completed when entering a new briefing. The form is completed by entering information or selecting items from a dropdown listing.
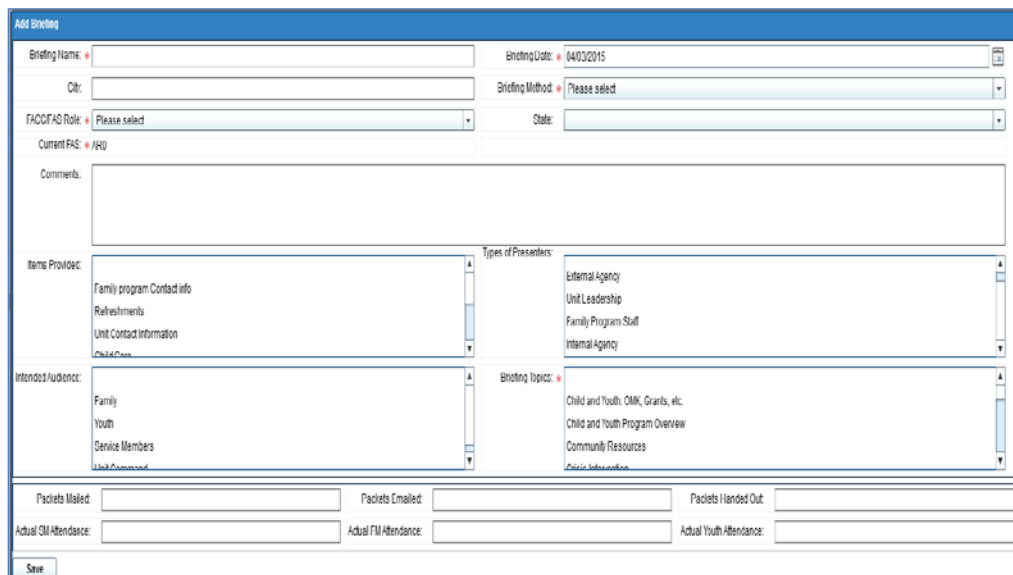
Briefing Dropdown Selections

FAC/FAC Role
Presenter
Supporter
Presenter And Supporter

Briefing Method
Conference Call/VTC/Webinar
Formal
Informal
One on One

Items Provided
Family program Contact Info
Refreshments
Unit Contact Information
Child Care
Helpful Literature based on briefing type
Activities
Marketing materials to the unit to advertise the briefing
Material to orient/educate about unit and its mission

Intended Audience
Family
Youth
Service Members
Unit Command

Types of Presenters
External Agency
Unit Leadership
Family Program Staff
Internal Agency

Briefing Topics
Briefing Topics
Child and Youth: OMK, Grants, etc.
Child and Youth Program Overview
Community Resources
Crisis Intervention
DEERS and ID Card
Deployment Life Cycle
Education and Training
Education and Training: Benefits
Education and Training: Programs
Education and Training: Spouse
Employment
Employment Assistance
Employment ESGR
Employment Resume Writing
Employment Spouse

Family Assistance Overview
Financial
Financial: Assistance
Financial: Budgeting
Financial: Credit Management
Identity Theft
Legal
Legal: Power of Attorney
Legal: Wills
Resiliency (MRT/RTA)
Strong Bonds Overview
Suicide Prevention Overview
TRICARE
Wounded Warrior/CISM/TAPS
Unknown

When making selections, simply click on the item you wish to select from the dropdown selection list. Multiple items may be selecting by holding down the control key (Ctrl) on your keyboard and clicking items with your mouse. To unselect items hold the Ctrl key and click the item(s) you wish to unselect.

Scrolling toggles are available to the left of the item sections.

After you complete entering the information, review the document and make changes as necessary. Once you are satisfied that the information is correct, click the Save button located in the lower left side of the screen.

The record is then created in the system. A pop-up message appears identifying whether or the information saved successfully. Click the OK button.
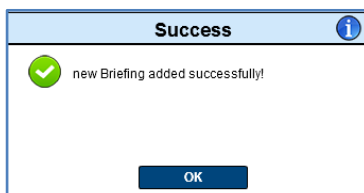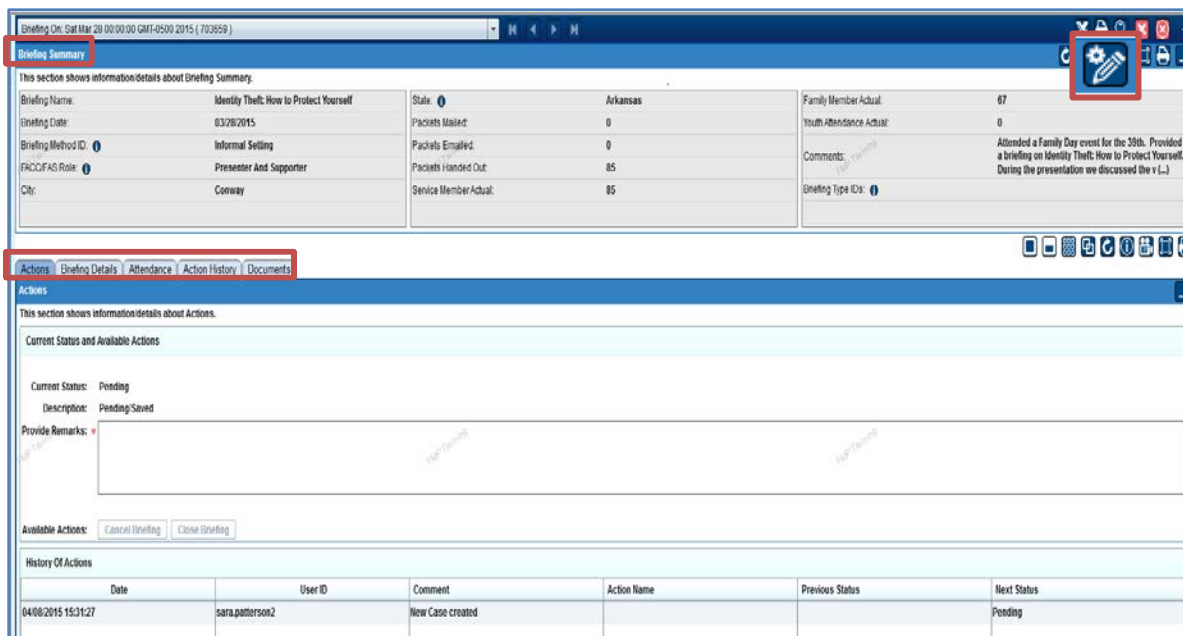
Briefing Record

The record is divided into sections as identified below.

BRIEFING SUMMARY
Contains the information entered on the briefing. This section can be edited by selecting the edit icon on the far right side -

BRIEFING TABS
- <u>Actions</u>: Identifies the current status of the briefing (Pending or Closed)
- <u>Briefing Details</u>: Identifies Items Provided, Briefing Topics, Types of Presenters, and Intended Audience. This section can be edited.
- <u>Attendance</u>: This section is used to record the attendance of units, SMs, and community partners.
- <u>Action History</u>: Provides information on the history of the briefing and all actions/changes made to the briefing information.
- <u>Documents</u>: This section is used to house items such as the agenda, handouts, or written sign in sheet.

Actions Tab

On the Actions tab, the Provide Remarks section must be completed. Once information is added, the Cancel Briefing and Close Briefing options become available for selection.

If the record was created in advance and the briefing was cancelled, complete the remarks section by stating the briefing was canceled and why, then select Cancel Briefing.

If the briefing was completed, write a brief statement about the briefing and then select Close Briefing.

A pop-up will appear confirming the action selected. Select OK to continue. Select Cancel to go back to the form and make additional comments.

The History of Actions will also be updated with the information.

Briefing Details

Briefing details may be changed by using the Ctrl key and clicking with the mouse. Make sure and scroll to the bottom of the section and click Save.

Attendance

Attendance information should be documented in this section. At a minimum, the unit should be added.

Begin by clicking on the Select Units button:

Units may be searched by UIC/PAS Code, Unit Name, Unit State, or Branch of Service. Fill in the section and then click the Search button.

Units will appear according to the search criteria entered.

Double-Click on the unit you wish to select.

The unit is then added to the record. Remember to click on Save Changes. If the unit was added in error, click the box in the Remove column and then click Save Changes.

After adding the unit, specific SM attendance may then be documented. Click the maximize icon on the far right side of the Service Member Attendance tab.

A listing of the SMs within the unit then appears. Using your attendance roster, match the attendance using the information in the FullName column and then make selections by clicking the box in the Attended column.

Follow the same process for adding FM attendance. Only FMs who have records in FMP will appear in the list. Click the maximize icon for a listing of FMs.

To add Community Resources, click on the Select Community Resources button.
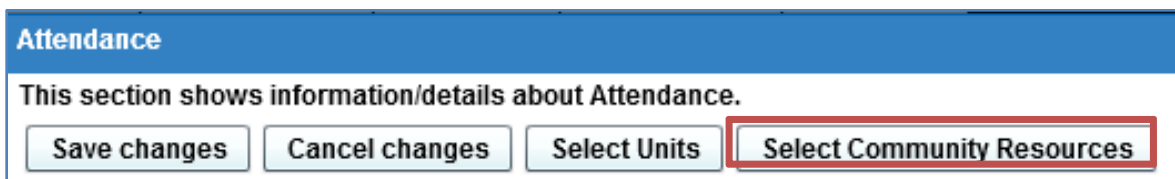
A pop-up appears. Enter the search criteria such as the Organizations Name, City, or State. Then click on Search.

The display results appear according to the criteria selected. To add a particular resource, double-click on the item. Only one resource may be added at a time.

The selected resource will then be added to the attendance record. Make sure and select Save Changes at the top of the Attendance section. If an item was mistakenly added, click the Remove box in front of the selection and then click Save Changes.

Action History Tab

This tab provides a complete history of actions completed concerning the briefing.

Documents

Documents may be added to the record from the documents tab. Typical items that are recorded on the page are attendance records and presentation information.
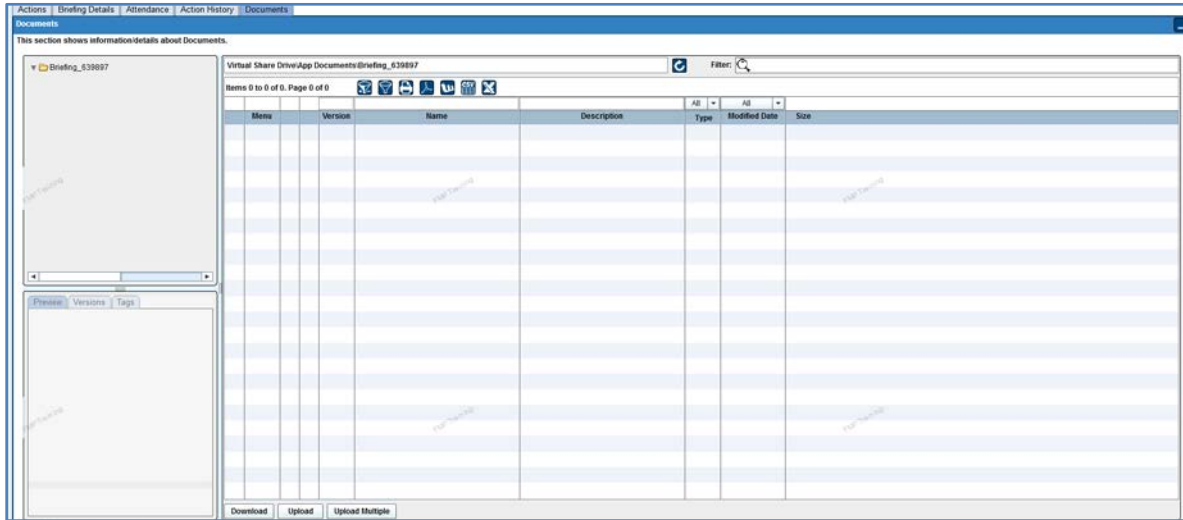
Family Management Program (FMP)
SITE VISITS

April 2015

Family Management Program (FMP)
SITE VISITS

Adding a New Site Visit

A new site visit is entered into FMP from the Landing Page.

Click the Add Site Visit tab. The site visit information form will display.

All information is required to be completed in order to save the document.

- Name: Provide a name for your site visit
- Date: Use the pop-up calendar to select the date of the event occurred.
- Site Visit Type: Scroll through the site visit type listing by clicking on the dropdown arrow, then click on the item to identify the type of site visit.
- Number of Attendees: Enter the number of attendees at the event.
- Details: Provide the who, what, when, where, why, and how information about the event. Explain your role and purpose at the event.

Site Visit Type Categories

Change of Command	Market FAC Program
Child and Youth Event	Military Facility Visit
Commander or Staff Designee Meeting	MOB Event
Commander's Call	Other Branch of Service: Briefing
Community Meeting	Other Branch of Service: Meet with
Community Meeting: JCF	Leadership
Community Partner Collaboration	Other Branch of Service: SM/FM
Drill Weekend	RSP
Family Day/Holiday Drill	SRP/SRC
FRG Meeting	Staff Meetings
Homecoming Event	Yellow Ribbon Event During
Job Fair	Yellow Ribbon Event Post
Local Community Event	Yellow Ribbon Event Pre

To select the date, click on the calendar icon and then select the date of the event.

Enter the event information and then click Save.

Completing the Record

The Site Visit record is then created. The status is currently Scheduled. To complete the site visit, click the Complete Site Visit button. If the site visit was entered in advance of the event and the event was canceled, click the Cancel Site Visit button.

A confirmation pop-up appears to verify your action. Click on OK to continue

Site Visit Summary

The summary information on the site visit is in the top section of the record. This information may be edited by selecting the edit icon in the upper right corner of the section -

Site Visit Community Resource Attendance

Attendance information should always be documented in FMP. The Site Visit Community Resource Attendance tab is used to add Community Resource participant attendance.

Begin by clicking the Select Community Resources tab.
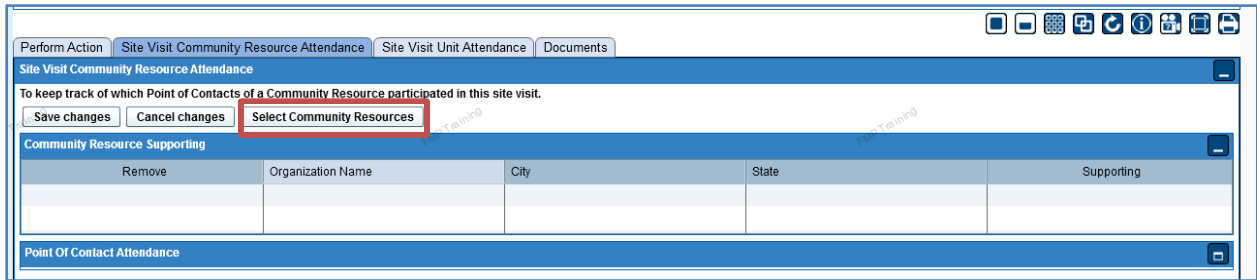
A pop-up appears. Enter the resource's Organization Name, City, or State and then click on Search.
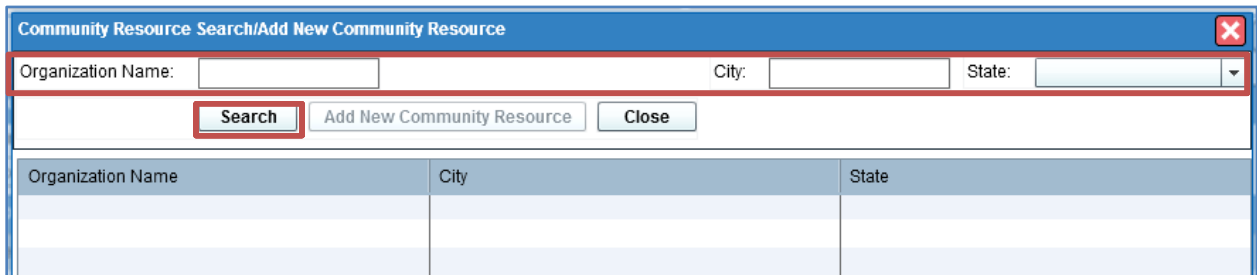
The example below shows the State search criteria as Arkansas (AR) chosen from the dropdown arrow listing. The results are displayed below the search criteria options. Scroll through the list and double-click on the item you wish to add as attending. Only one item at a time may be selected. Repeat the steps to add another resource.
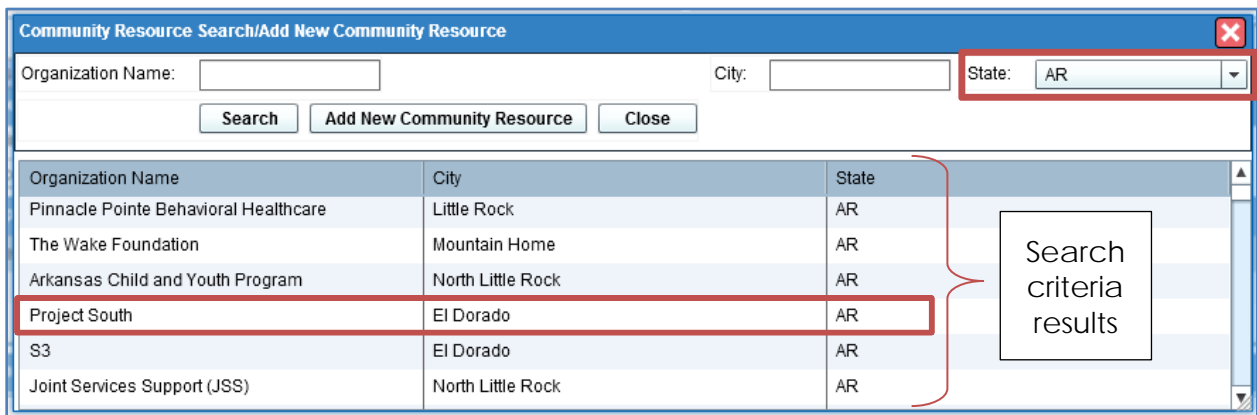
After each selection, the system takes you back to the attendance screen. After adding your resources, click the Save Changes button. If an item was added incorrectly, click the box in Remove column in front of the resource's name.

The Point of Contact may also be added as attending by maximizing the Point of Contact Attendance section and then clicking the box in the Attended column in front of the participant's name.

Site Visit Unit Attendance

To add unit attendance, click the Site Visit Unit Attendance tab. From the display, click Select Units.

A pop-up then appears. Enter the criteria information for the unit (UIC/PAS Code, Unit Name, Unit State, and/or Branch of Service, then click on Search.

The results then display. Double-click on the unit to add the attendance. Repeat the process to add as many units as necessary.

Additionally, individual SM attendance may then be added by maximizing the Service Member Attendance section. Click in the box in the Attended column to add the individual as attending. After selecting all in attendance, click the Save Changes button. Note: Information has been blocked out for privacy reasons.

Documents

Documents may also be added to the site visit record. Click on the Documents tab and upload information like rosters, agendas, etc.
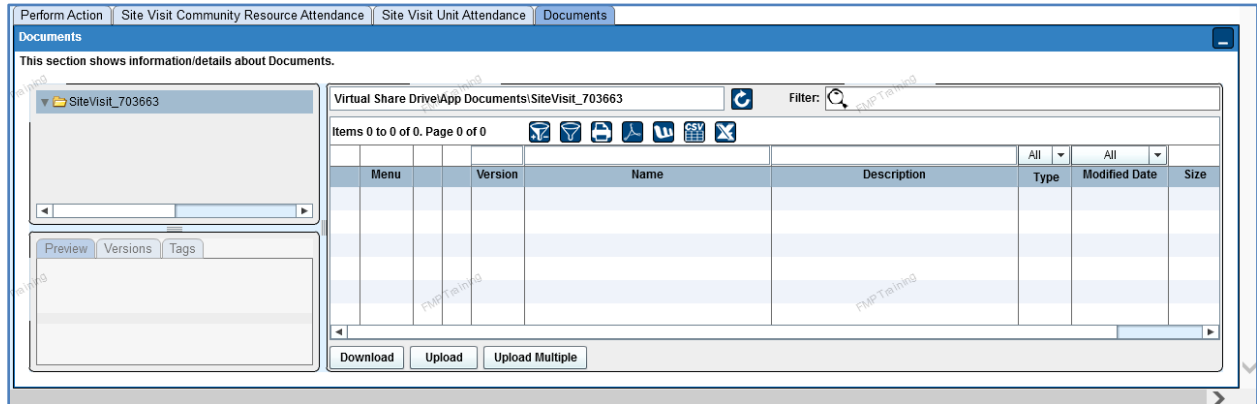
Searching for a Site Visit Record

To search for a Site Visit record, follow the steps below:

1. From the Command Center, select **Site Visit** in the search drop down menu.
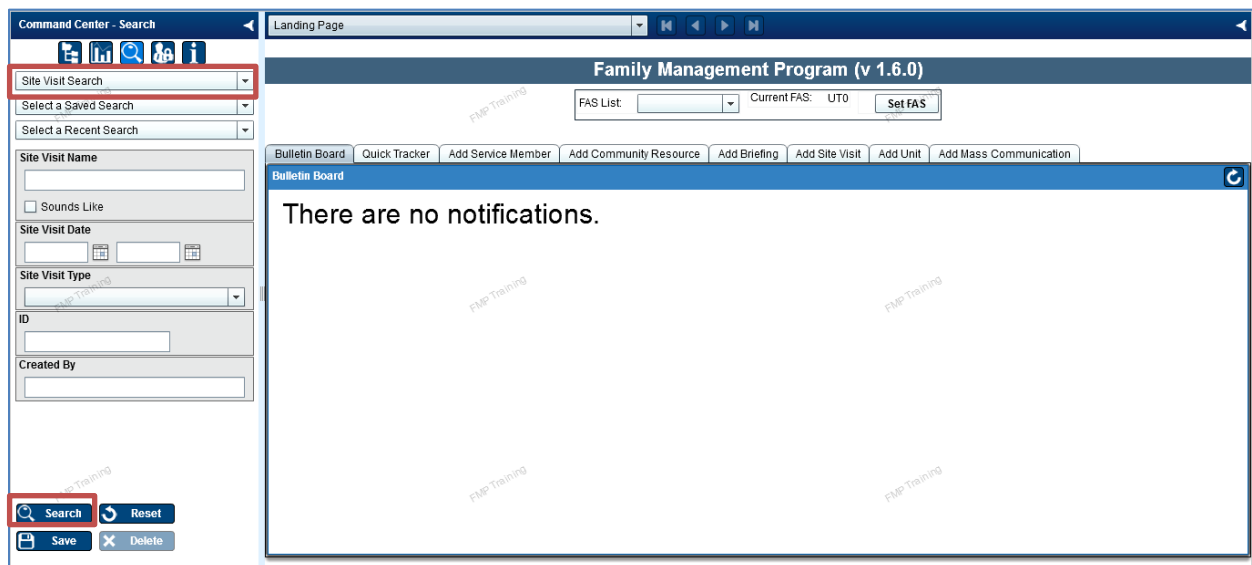
2. Enter any **search criteria** you want to search and then select **Search**.
   a. Site Visit Name
   b. Site Visit Date
   c. Site Visit Type
   d. Site Visit ID
   e. Created By

3. The search results will display on the 2nd panel. To access a specific record, **click on the record**.
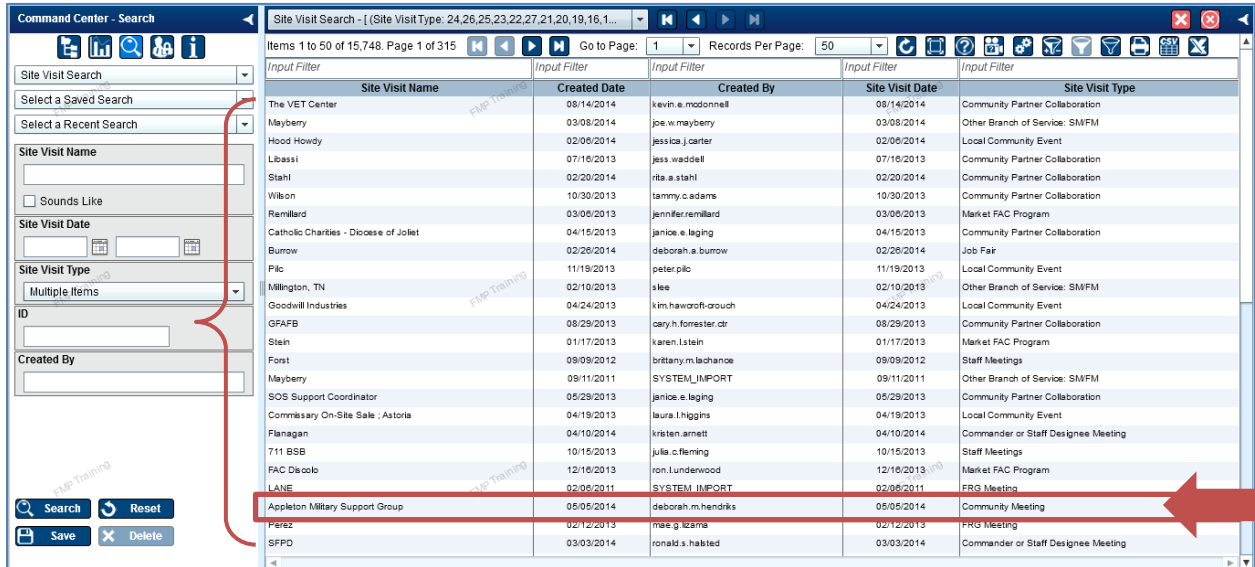
4. The record will open up in a third panel, as shown below.
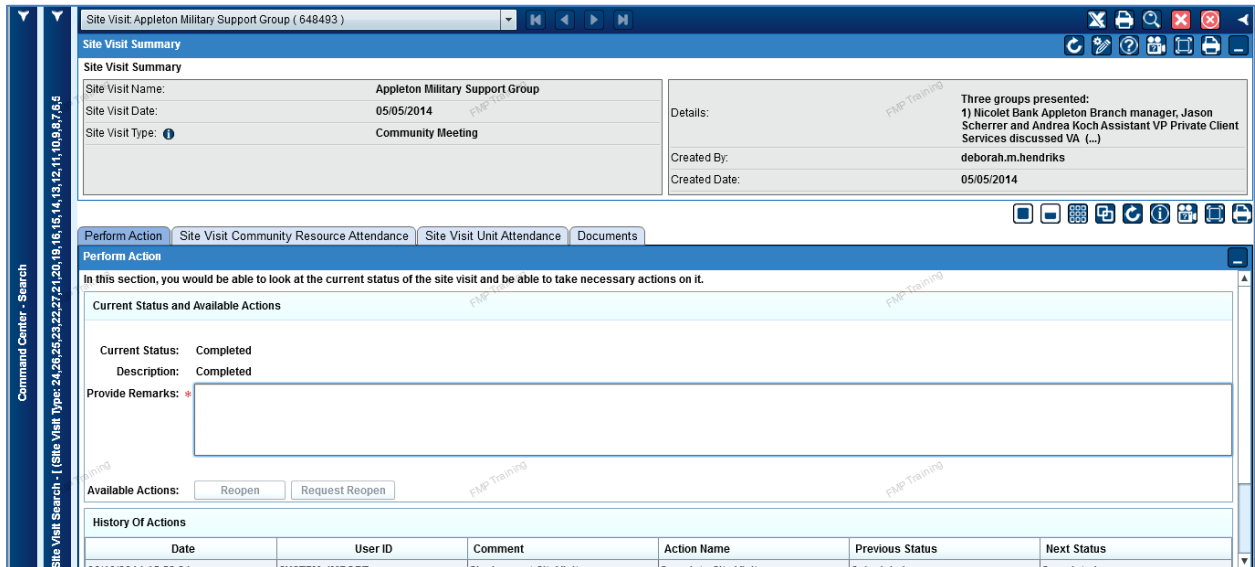
Editing the Site Visit Summary

1. To edit a Site Visit record, click on the **edit icon**.

2. Make desired changes to the summary and then select **Save and Exit**.

Family Management Program (FMP)
CASE MANAGEMENT

April 2015

Family Management Program (FMP)
CASE MANAGEMENT GUIDELINES

Overview and Definition

A *Case* is created when a Service Member or a Family Member has an issue or situation in which you have been asked for assistance. It is documentation of the issue and all the history of actions taken to resolve the issue. A separate case is opened for each issue, under the name of the person who benefits from the services. Case details are documented, to include resource/information provided and follow-up.

- Examples of cases are pay issues for SM's, FM may call about a SM not providing financial support, emergency message to the Red Cross, or maybe a FM calling about having a tough time adjusting to her/his spouse's deployment and he/she would like to speak to a counselor. The possibilities are endless.

When talking with the customer, listen carefully to identify all of the issues. Many times what appears to be a request for financial assistance becomes a request for job assistance, child care assistance, and/or counseling as well.

A separate case under the name of the person who benefits from the services should be opened documenting each issue.

Cases are logged by Issue Category and Type. This information is aggregated and used in management reports to determine trends and provides statistical information on military Family issues. All cases are tied to the staff member who entered the case into the system.

Case documentation should be entered within 72 hours of origination.

Follow-up Timelines

Cases are vastly different and may have different follow-up needs based on the type of the case and the individual requesting assistance or information. As a general rule, emergent or emergency case situations require follow-up within 24 hours. Non-emergent cases require follow-up within 48 hours or later depending on the situation. You will need to use your professional judgment.

Cases which take a longer period of time to work must be reviewed and documented in FMP on a weekly basis.

Providing Resources

When working cases you MUST provide at least one resource.

In general, it is best to provide no more than one or two resources at a time. Offering multiple resources may overwhelm the SM or FM. It also makes it difficult to provide follow up on resources.

Take into account the type of information you are offering and the situation. For example: offering multiple scholarship opportunities to an individual would be appropriate. Offering multiple financial sources to an individual would be overwhelming and may lead to inappropriate use of financial assistance.

Case Categories and Issue Types

When working cases, you may come across a situation that does not "fit" in one of the categories below. Use your best judgment and select the most closely related category available.

Behavioral Health/Counselor Support

- Addiction
- Anxiety
- Behavioral Health Education Materials
- Career and Life Planning
- Childhood/Adolescence
- CISM/Wounded Warrior/TAPS
- Civilian resources
- Coping with Separation
- Depression
- Educational Materials (problem solving, stress management, parenting, fitness, nutrition, wellness, health)

- Family Counseling
- General Counseling
- Grief Counseling
- Marital Concerns
- MFLC Referral
- Postpartum Depression/Parenting Issues
- PREP/Strong Bonds
- PTSD
- Readjustment Counseling
- Resiliency Training and Referral
- Service Member/Failure to Adapt to Military Life
- Substance Abuse

Child and Youth Related

- Academic Difficulties
- Behavior Issues—Child to Child
- Behavior Issues—Other
- Behavior Issues—Parent
- Behavior Issues—School
- Bullying
- Child Care
- Deployment Information/Child and Youth
- Emotional Difficulties

- Funding for Child and Youth Programs
- Military Youth Volunteer
- Programs for Child and Youth
- Recognition/Letter of Recommendation
- Scholarship Information
- Significant Life Change (Activities/Responsibilities/Situations)
- Youth FRG

Communications

- Access AKO/DKO or Other Military Email
- Calling Card Request
- Computer Use/VTC Request/Video Solution/DSN

- Rumor Control
- Service Member Not in Contact with Family

Community Outreach/Partnerships

- Benefits & support for Military families websites or contact info
- Care Packages
- Community Organizations Donating Items for Military Families
- Community Partnerships
- Community/Individual Donations
- Elder Care
- Offer of Donation and/or Holiday Adoption
- Speaking Engagement
- Special Needs Family Members
- Support for Parents of Service Members
- Volunteer opportunities/services
- Volunteer Services

Community Resources

- Elder Care
- Food Banks
- Homeless
- Shelter Services
- Public Assistance
- Holiday Donations and/or Adoption

Crisis Referral and Intervention (Duty to Warn)

- Child Abuse/Neglect
- Danger to Others
- Danger to Self
- Domestic Abuse
- Elder Abuse/Neglect
- Sexual Assault

Death and Survivor Benefits

- Burial Questions
- Information and Referral
- Survivor Benefit Plan

Deployment/Mobilization Support

- Care Packages
- Deployed Units/Mailing Address
- Education Materials
- Homecoming Location/Timeframe
- Mobilization/Reintegration Location/Timeframe
- Pre-Mobilization Location/Timeframe
- Reintegration with Local Unit
- Reunion Briefings
- YRRP Event Information

Education – Service Member

- Career/Education Exploration
- Education Grant/Scholarship Information from Local/National Programs
- Tuition Assistance

Education – Spouse

- Career/Education Exploration
- Education Grant/Scholarship Information from Local/National Programs
- Tuition Assistance

Education – Youth

- Career/Education Exploration
- Education Grant/Scholarship Information from Local/National Programs
- Tuition Assistance

Employer Support of the Guard and Reserve (ESGR)

- Employer Inquiry
- Family Member Problem with Employer
- ESGR Benefits and Entitlements
- Re-Employment Issues Following Deployment
- Service Member Problem with Employer

Employment – Spouse

- Career Opportunities
- Employer Issues
- Job Assistance/Job Fairs
- Self Employed/Small Business Owner Concerns
- Unemployment

Employment – Service Member

- Career Opportunities
- Employer Issues
- Job Assistance/Job Fairs
- Self Employed/Small Business Owner Concerns
- Unemployment

Employment – Youth

- Career Opportunities
- Employer Issues
- Job Assistance/Job Fairs
- Self Employed/Small Business Owner Concerns
- Unemployment

Exceptional Family Member Program (EFMP)

- EFMP Referral and Contact Info

Family Advocacy Program

- Referral and Contact Info

Family Care Plan

- Documents Required
- Family Care Plan Requirements
- Plan was Incorrectly Prepared
- Process Information

Family Readiness Groups

- Find/Join FRG (Family Members)
- FRG/Unit Contact Info
- Parents of Service Members/Support
- Personality Issues (FRG Members)

Financial

- Auto Payment/Behind
- Bankruptcy
- Budget Counseling
- Deployed Pay Non-Taxable Income being Taxed
- Emergency Funds Request
- Entitlements (BAH, Hazard Duty, etc.)
- Family Pay Issues
- Foreclosure
- Issues with Collections/Creditors
- Loan/Grant Request (Military Affiliated)
- Medical Bill Assistance
- Military Pay Incorrect
- Military Pay is Late/Delayed
- Personal Financial Management
- Poor Financial Management
- Rent or Mortgage Payment/Behind
- Tax Assistance (W2s or Tax Preparation)
- Utility Bill Assistance

ID Cards

- DEERS Enrollment
- Eligibility
- ID Card Locations
- Required Paperwork for ID Card

Legal

- Child Support
- Copy of Orders
- Creditor Issues
- Criminal Issues
- Custody/Visitation Issues
- Dependency Determination Packets
- Difficulty with Creditors
- Eviction Notices
- Financial Neglect of Family
- Immigration/Naturalization Issues
- Inquiry/Advice
- Litigation
- Notary Public Services
- Passports/Birth Certificates/Social Security Cards
- Paternity
- Power of Attorney/Wills
- Real Estate
- Repossession
- Separation/Divorce
- Tax issues
- Traffic violation

Military Related

- Absent Without Leave (AWOL)
- Copy of Orders
- DD214
- Medical Hold/ Line of Duty/MMSO Questions
- Military School Related
- Military Training Related
- Records Request
- RSP Related

Military Retirement

- Application for Retirement Pay
- Benefits (Commissary/Post Exchange/MWR)
- Pay
- Retired Dental (Delta)
- SF 180 (separation papers)

Natural Disaster

- Planning for Natural Disasters
- Damage to Home
- Displaced Family/Service Member
- Loss of Essential Services
- Loss of Homes
- Request for Emergency Housing

Property/Household Issues

- Insurance Issues
- Long Term Pet Care
- Major Appliance Breakdown
- Major Building Repairs
- Plumbing Repairs
- Property/Household/Storage
- Relocation Assistance
- Telephone Service
- Transportation Issues-Lack of Reliable Transportation
- Trash Removal
- Tree/Brush Removal
- Utilities
- Vehicle Issues
- Vehicle Storage during Deployment
- Veterinary Care
- Yard Care

Relocation Assistance

- PCS information, education materials and referral

TRICARE Information and Referral

- Application Assistance—Dental
- Application Assistance—Medical

- Claims Processing—Dental
- Claims Processing—Medical
- Early Eligibility/Issues
- Eligibility Issues—Dental
- Eligibility Issues—Medical
- Provider Location—Dental
- Provider Location—Medical
- Travel Reimbursement
- TRICARE - TAMP

- TRICARE for Life
- TRICARE Pharmacy
- TRICARE Program Information (Standard, Prime, Prime Remote)
- TRICARE Reserve Select (TRS)
- TRICARE Retired Dental (Delta)
- TRICARE Retired Reserve (TRR)
- TRICARE Vision
- TRICARE Young Adult (TYA)

Urgent/Critical

- Adult Protective Referral
- Birth in Immediate Family
- Death—Family Member
- Death—Service Member

- Illness or Injury—Family Member
- Illness or Injury—Service Member
- Red Cross Message to Service Member

VA Related

- Benefits
- Contact Info and Educational Materials
- Disability Claims
- Education Benefits
- Education Issues (Late/Lack of Funding)
- Education Programs

- Legal
- Loans
- Medical and Dental
- Military Services Documentation
- Rehabilitation
- Veteran Specific Services (ACAP, Advocacy)
- VGLI

Crisis Intervention and Referral

Family Assistance staff MUST follow their State guidelines when working crisis intervention and referral cases, as Duty to Warn laws vary across the country.

Crisis Intervention and Referral case types:

- Child Abuse/Neglect
- Danger to Others
- Danger to Self

- Domestic Abuse
- Elder Abuse/Neglect
- Sexual Assault

Case Categorization and Type

When working cases associated with Crisis Intervention and Referral caution must be used when selecting the case category and issue type, as well as how it is documented in FMP.

When Family Assistance personnel are directly contacted by a Service Member or their Family, for one of the reasons listed above, it is documented as a Crisis Intervention case.

When Family Assistance personnel are contacted by someone *other than* a Service Member or their Family for one of the above reasons, it may or may not be documented as a Crisis Intervention case depending on the situation. Examples are listed below:

- Example A: if a commander is working a domestic violence case and has contacted you regarding temporary shelter for the SM, the case would be documented as a Community Resource case with Shelter Services as the type. In the comments, you can indicate this is a result of a domestic abuse claim.

- Example B: Military OneSource has contacted you directly to report a Duty to Warn situation on a Family Member. You would open a Crisis Intervention and Referral case with the appropriate type under the individual needing assistance. State Duty to Warn guidelines would then be followed and documented in the record.

Crisis Intervention/Duty to Warn cases worked by SFPDs should be documented by SFPDs in the FMP system. FAC Coordinators will need to work closely with SFPDs to ensure follow-up in the system has been completed in a timely manner. If the SFPD is unable to document the case, the FAC Coordinator may enter the information and indicate it is on the behalf of the SFPD.

Crisis Intervention and Referral Documentation

Cases entered in FMP are official records. Case documentation MUST be professional and factual. Documentation should explain the issue and include information pertinent to the case. Use caution and professional judgment as you provide comments.

Details that are sensitive in nature should not be included in the comments.

- Example: If a Family Member contacts you stating her husband was harming her, you would open a Domestic Violence case. What she alleges her husband did does *not* need to be included in the case details. Case details should include the type of assistance she has requested and the resources provided.

Examples of Cases

Listed below are examples of the types of situations that are tracked as cases in FMP:

- Service Member contacts you regarding employment opportunities. They are currently unemployed. They are also feeling anxious over the situation and are running out of money to pay rent next month.
  - o Potential cases to be tracked separately (category/type):
    - Employment: Service Member related / Career Opportunities
    - Financial / Rent or Mortgage Payment/Behind
    - Behavioral Health/Counselor Support / Anxiety
- Parent contacts you because they have not been in contact with their RSP Service Member.
  - o Potential cases to be tracked separately (category/type):
    - Military Related / RSP related
    - Family Readiness Groups / Parents of Service Members/Support
    - Communication/SM not in contact with Family
- Family Member with a deployed SM calls you regarding automotive problems.
  - o Potential cases to be tracked separately (category/type):
    - Property and Household / Transportation Issues-Lack of Reliable Transportation
    - Financial / Emergency Funds Request
    - Property and Household/Vehicle Issues

Proper Documentation in FMP

FMP is the data management system for the National Guard. Authorized State and national leadership have access to view records as needed. It is vital to document in a professional manner. This includes, but is not limited to, the proper use of grammar (i.e. complete sentences), spelling, etc.

In addition, FAC staff may need to assist or cover for one another and good documentation gives insight when conducting outreach or working a case. All data is permanent once saved into FMP.

Examples of Appropriate/Inappropriate Case Documentation

Improper: "financial problems. Gave her number to VFW."

Proper: "Mrs. Jones called and needs assistance paying her rent this month. She had some unexpected medical expenses with her son (dental crown). We spoke about different options and she has been referred to VFW Unmet Needs Program. I have provided the application and contact information for her. I will follow up with her in two days to ensure she was able to complete and submit the application. "

Follow-up   "all is well. :)"
Improper

Proper: "Spoke to Mrs. Jones today to check on the status of her application process. She had submitted the application to the VFW Unmet Needs Program and is awaiting a response. They stated it would take three days. I instructed her to contact me if they are not able to assist or for any additional needs that arise."

An additional follow-up is needed to confirm the funding was received.

Additional Considerations

When providing follow-up, a final follow-up needs to be completed to ensure needs were met/services were received. After the final follow-up is completed, the case is able to be closed.

Use caution when using acronyms or abbreviating words. Uncommon acronyms may only make sense to you (i.e. TP for telephone versus toilet paper).

Avoid religious undertones as they may violate EEO and Ethical standards.

At times we deal with individuals who are difficult to communicate with or are unmannerly. Document those interactions as well taking care to avoid negative or derogatory comments about the individual. Examples:

- Appropriate: "FM is very frustrated we are not able to fund her auto repairs"
- Inappropriate: "FM is very rude and yelled at me."

Detailed medical issues. Example: "SM is having medical issues at this time" versus "SM has been diagnosed with breast cancer and had a mastectomy".

Family Management Program (FMP)
REPORTS

April 2015

A Few Notes on Reports

Reports in Family Management Program (FMP) system continue to be developed based on the needs of state users and NGB. Included in this handout are the reports currently available, as of the date of publication. Updates to the handout will be completed as needed.

User roles (i.e. FAC Coordinators, FAC Specialists, State Family Program Directors) may have access to different information within the reports section. For example: FAC Coordinators are able to view results for all FAC staff in their state. Specialists are only able to view reports on the work they accomplished. This will vary from report to report.

If you have questions or concerns, please refer to your leadership. Thank you!

Reports Available as of April 2015

Case Reports

- Case Issue by Category and Type
    - The number of cases created from the user by category.
- Cases by Customer (SM/FM) Unit State
    - The number of cases organized by the unit state of the SM/FM. If the case is related to a Family Member, the unit state of the Family Member's Service Member is used.
    - This is a great report for pulling Top 5 case information for leadership.
- Cases by User State
    - The number of cases organized by the user (FAS) state and then the creator.
- Closed Cases
    - The number of closed cases organized by the user (FAS) state.

Site Visit Reports

- Site Visits by Community Resource
    - The number of site visits organized by community resource.
- Site Visits by Unit
    - The number of units that will have a site visit.
- Site Visits by User State
    - The number of site visits organized by user (FAS) state.

Briefing Reports

- Briefed Topics

- o The Briefed Topics report will return the number of topics that have been briefed. Since a briefing may cover multiple topics, it is possible for a briefing to be counted multiple times.
- Briefed Units
  - o The number of units that have been briefed. Because many units may attend a single briefing, each briefing may be counted more than once in this report.
- Briefings by User (FAS) State
  - o The number of briefings organized by the state of the user (FAS).

Outreach Reports

- Open Outreaches by User (FAS) State
  - o The total number of outreach cases that are not in a closed or deleted status state.
- Outreach Success Rate – Coming Soon
  - o The number of outreaches with successful and unsuccessful dispositions at the end of each month.
- Outreach Success Rate by Client State
  - o The number of outreaches with successful and unsuccessful dispositions at the end of each month.
- Outreach Attempts by Unit – Coming Soon
  - o The total number of outreach attempts by unit.
- Outreaches by Unit – Coming Soon
  - o The total number of outreaches by unit.

Quick Tracker Reports

- Quick Tracker Status
  - o The number of quick trackers created and their status.

Contact Reports

- Contact by User State
  - o The Contact by User State report will display the contacts made by the user.

Mass Communication Reports

- Mass Communication by Method
  - o This report displays the number of mass communication methods used.
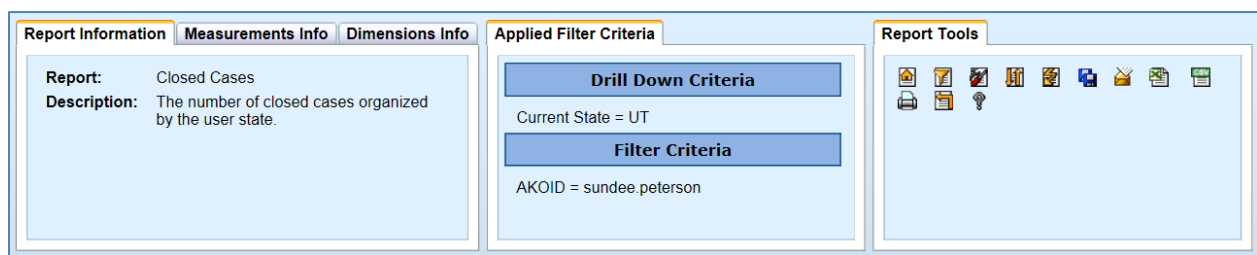
Other Reports

- FAS Detailed
  - o The number of briefings, site visits, outreach attempts and cases by time period enter by a user (FAS).

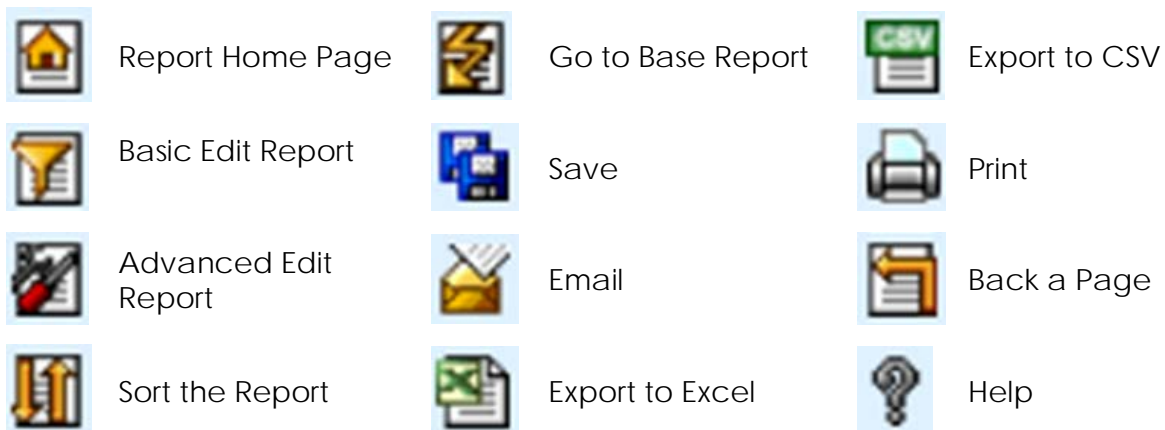# Reports – Navigation Basics

General Navigation

Several folders are located at the top of all reports results, as shown below. Information includes:

- Report Information: Name and description of report
- Measurements Info: Provides info on what is being measured
- Dimensions Info: Displays the FAS Node, AKOID, and Current State
- Applied Filter Criteria:
- Report Tools

Report Tool Icons
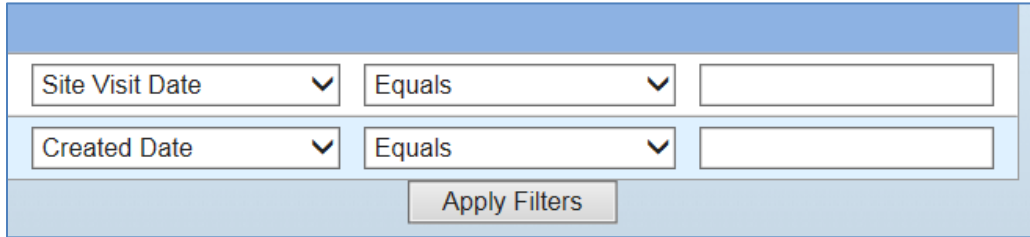
Shown below are the report tool icons:

	Report Home Page		Go to Base Report		Export to CSV
	Basic Edit Report		Save		Print
	Advanced Edit Report		Email		Back a Page
	Sort the Report		Export to Excel		Help

Exporting to Excel

All reports can be exported to an Excel (or CSV) spreadsheet. From there, you can arrange the report results as desired.
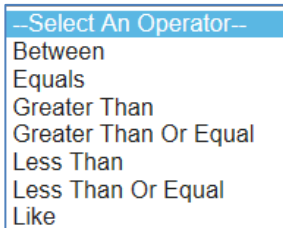
Select Time Frame or Created Date Filters

Information can be filtered for your report results. For example: by the site visit date or by the date the site visit was created/entered into FMP.
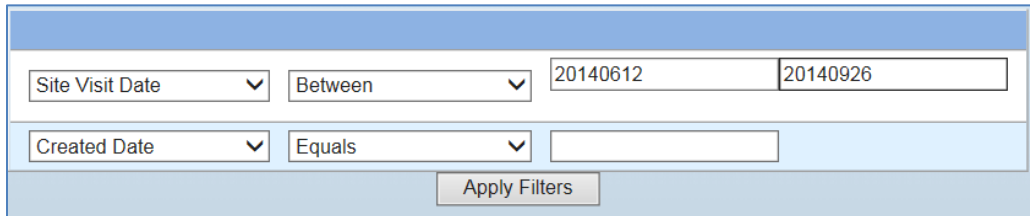
In the second column (Equals), click the dropdown arrow. The time frame selections are as shown below.

- *Between* allows you to enter a range of dates.
- *Equals* allows you to select a specific date.

Once your time frame has been selected, click in the boxes on the right and use the pop-up calendar to select your dates. Click Apply Filters.

Case Reports

Cases by Customer (SM/FM) Unit State

- The number of cases organized by the unit state of the SM/FM. If the case is related to a Family Member, the unit state of the Family Member's Service Member is used.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *Cases by Customer Unit State*. The information can be "drilled down" in different ways depending on your needs.

- To view case categories/issue types click on the state as shown (red arrow).
- To view a list of cases for a state, sorted by unit, click on the number as shown below (green arrow).

Drill Down by Number Results (green arrow)

Results will display the cases, sorted by unit, for the state selected.

Drill Down by State Results (red arrow)

Results will display the units that have cases. To drill down to a specific unit, click on the unit, as shown below.

Drill Down by Unit Results

Results will display the cases within the unit selected. To drill down to case categories, click on the category, as shown below.

Drill Down by Categories Results

Results will display the case issue types within the selected case category for the unit selected. To drill down to a list of cases within an issue type, click on the category, as shown below.

Drill Down by Categories Base Report Results

Results will display the cases for a specific issue type for the unit selected.

Cases by User State

- The number of cases organized by the user (FAS) state and then the creator.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *Cases by User State*. The information can be "drilled down" in different ways depending on your needs.

- To view cases generated by a specific FAC staff member, click on the state as shown below (red arrow).
- To view a combined list of cases for a state, sorted by FAC staff, click on the number as shown below (green arrow).

Drill Down by Number Results (green arrow)

Results will display the cases, sorted by FAC staff, for the state selected.

Created By	Created Date	Issue Date	Current Case Status	Issue Category
sundee.peterson	06/23/2014	06/22/2014	Closed	Behavioral Health/Counselor Support and Contact Info
sundee.peterson	06/24/2014	06/24/2014	Incomplete/Saved	Behavioral Health/Counselor Support and Contact Info
sundee.peterson	06/25/2014		Incomplete/Saved	
sundee.peterson	06/26/2014	07/01/2014	Requires Followup	Behavioral Health/Counselor Support and Contact Info
sundee.peterson	07/02/2014	07/01/2014	Closed	Behavioral Health/Counselor Support and Contact Info
sundee.peterson	07/16/2014	07/15/2014	Requires Followup	Education: Youth
sara.patterson2	06/24/2014	06/23/2014	Closed	Relocation Assistance
sara.patterson2	06/25/2014		Deleted	
sara.patterson2	06/25/2014	06/17/2014	Requires Followup	Employment: Youth
sara.patterson2	06/25/2014	06/23/2014	Deleted	Community Outreach/Partnerships
sundee.peterson	08/25/2014	08/24/2014	Pending Referral Acceptance	Education: Spouse
sundee.peterson	07/16/2014	07/15/2014	Pending Referral Acceptance	Family Readiness Groups
sundee.peterson	08/27/2014		Incomplete/Saved	
sundee.peterson	09/03/2014	03/15/2014	Pending Referral Acceptance	Deployment/Mobilization Support
sundee.peterson	09/17/2014		Incomplete/Saved	
sundee.peterson	07/16/2014	07/15/2014	Pending Referral Approval	Communications
sundee.peterson	08/26/2014	08/26/2014	Referral Denied	Behavioral Health/Counselor Support and Contact Info
sundee.peterson	08/27/2014	08/27/2014	Pending Referral Acceptance	Employer Support of the Guard and Reserve (ESGR)
sara.patterson2	06/25/2014		Deleted	

Drill Down by FAS Nodes Results (red arrow)

Results will display the FAS nodes for the state selected. To drill down to a specific FAS, click on the FAS node, as shown below.

Drill Down by Individual FAS Node Results

Results will display the individual FAS node for the state selected. To drill down to cases created by a specific FAS, click on the FAS name, as shown below.

Individual FAS Node Case Base Report Results

Results will display the cases create by the individual FAS node selected.

Created By	Created Date	Issue Date	Current Case Status	Issue Category	
sundee.peterson	06/23/2014	06/22/2014	Closed	Behavioral Health/Counselor Support and Contact Info	Anxiety
sundee.peterson	06/24/2014	06/24/2014	Incomplete/Saved	Behavioral Health/Counselor Support and Contact Info	Anxiety
sundee.peterson	06/25/2014		Incomplete/Saved		
sundee.peterson	06/26/2014	07/01/2014	Requires Followup	Behavioral Health/Counselor Support and Contact Info	Anxiety
sundee.peterson	07/02/2014	07/01/2014	Closed	Behavioral Health/Counselor Support and Contact Info	Career and L
sundee.peterson	07/16/2014	07/15/2014	Pending Referral Acceptance	Family Readiness Groups	Find/Join FR
sundee.peterson	07/16/2014	07/15/2014	Requires Followup	Education: Youth	Tuition Assist
sundee.peterson	07/16/2014	07/14/2014	Closed	Military Related	Copy of Orde
sundee.peterson	07/18/2014		Incomplete/Saved		
sundee.peterson	07/16/2014	07/15/2014	Pending Referral Approval	Communications	Calling Card
sundee.peterson	07/02/2014	07/01/2014	Deleted	Education: Service Member	Education Gr
sundee.peterson	06/26/2014	06/18/2014	Closed	Behavioral Health/Counselor Support and Contact Info	Career and L
sundee.peterson	06/25/2014	06/23/2014	Closed	Behavioral Health/Counselor Support and Contact Info	Anxiety
sundee.peterson	06/25/2014	06/23/2014	Requires Followup	Employment: Service Member	Employer Iss

Closed Cases

- The number of closed cases organized by the user (FAS) state.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 4).

Shown below is the home report for *Closed Cases*. The information can be "drilled down" in different ways depending on your needs.

- To view cases generated by a specific FAC staff member, click on the state as shown below (red arrow).
- To view a combined list of cases for a state, sorted by FAC staff, click on the number as shown below (green arrow).

Drill Down by FAS Nodes Results (red arrow)

Results will display the FAS nodes for the state selected. To drill down to a specific FAS, click on the FAS node, as shown below.

Drill Down by Individual FAS Node Results

Results will display the individual FAS node for the state selected. To drill down to closed cases created by a specific FAS, click on the FAS name, as shown below.

Individual FAS Node Closed Case Baser Report Results

Base Report results will display the closed cases created by the individual FAS node selected.

Current State Abbr CD	Case Created Date	Case Created By	Case Issued Date	Issue Category	Issue Type
UT	20140624	sara.patterson2	20140602	Behavioral Health/Counselor Support and Contact Info	Addiction
UT	20140624	sara.patterson2	20140602	Deployment/Mobilization Support	Deployed Units/Mailing Address
UT	20140624	sara.patterson2	20140623	Relocation Assistance	PCS Information, Education Materials
UT	20140625	sara.patterson2	20140902	Behavioral Health/Counselor Support and Contact Info	Addiction
UT	20140625	sara.patterson2	20140625	Education: Service Member	Tuition Assistance
UT	20140625	sara.patterson2	20140618	Employment: Spouse	Career Opportunities
UT	20140625	sara.patterson2	20140616	Family Care Plan	Family Care Plan Requirements

Site Visit Reports

Site Visits by Community Resource

- The number of site visits organized by community resource.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

From the display list, click the number in the Total row on the right side of the page.

State ▲	State - Desc	# of Site Visits
AR	Arkansas	2
AZ	Arizona	1
MA	Massachusetts	1
PR	Puerto Rico	2
UT	Utah	10
WV	West Virginia	1
Total		**17**

The base report information is displayed as shown below. Use the scroll bar at the bottom of the screen and drag to the right to see all result information.

Site Visit Date	Name	Community Resource Type	Service Area	Website	State	Zip	Site Visit Nar
06/11/2014	Katie's Kookies	External Agency	State		UT	84403	Family Day - 19 SFG(A)
06/16/2014	New Resource	Internal Agency	Private-State		WV	25685	Staff Meeting II
06/20/2014	Katie's Kookies	External Agency	State		UT	84403	MS Practice
06/25/2014	Red Cross - Park City	External Agency	National	www.redcross.org	UT	84123	Tri County Veteran Netw
06/25/2014	Katie's Kookies	External Agency	State		UT	84403	Tri County Veteran Netw
06/25/2014	Juan Suchi	Civilian	Private-State		PR	00901	American Legion Briefing
06/25/2014	Red Cross - Park City	External Agency	National	www.redcross.org	UT	84123	American Legion Briefing
06/30/2014	Red Cross - Park City	External Agency	National	www.redcross.org	UT	84123	1990 CCT YR
06/30/2014	Gracie Farms	Civilian	State		AR	72023	1990 CCT YR
07/02/2014	Katie's Kookies	External Agency	State		UT	84403	York County Cuncil Mee
07/02/2014	Katie's Kookies	External Agency	State		UT	84403	Kiawanis Club - Cabot
07/09/2014	Red Cross - Park City	External Agency	National	www.redcross.org	UT	84123	Test Site Visit
07/17/2014	Beth's Bakery	Civilian	State		AZ	85233	Beth's Bakery Visit
07/30/2014	American Legion Post 11 Cabot	External Agency		www.legionpost11Cabot.com	AR	72023	American Legion July 30
07/31/2014	Katie's Kookies	External Agency	State		UT	84403	IPR
09/14/2014	Juan Suchi	Civilian	Private-State		PR	00901	102nd MP Company US.
09/14/2014	Jane's Juice Drinks	External Agency	State	www.janes.com	MA	01236	102nd MP Company US.

Scroll bar

For support, please e-mail the G1 Web Application **Help Desk** or call 1-800-339-0473.

Export the information to a spreadsheet, but clicking on the Excel icon in the Report Tools tab (upper right corner of page).
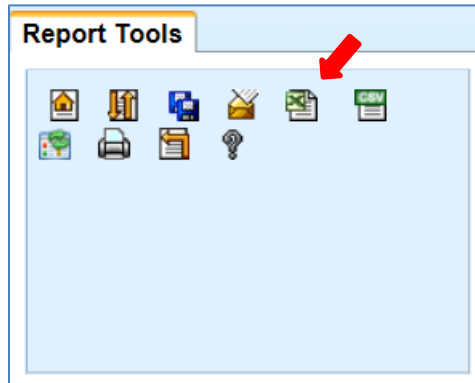
When prompted, you can Open or Save the document. Remember you must click on Enable Editing in order to make any changes in the document. Remove lines and delete columns as needed.

Site Visits by Unit

- The number of units that will have a site visit. This report also lists the unit name, site visit name, and site visit type.

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Created Date ⌄	Equals ⌄	
Site Visit Date ⌄	Equals ⌄	

Select timeframe dates then click on Apply Filters

Apply Filters

Site Visits by Unit

⊟ **Hide Page Information**

Rows 1 - 11 of 11   Select Page Size: 100 ⌄   ◁◀ Jump To Page: 1 ⚫ ▶▶|

⊟ **Hide Grid Data**

State ▲	# of Site Visits
AL	3
AR	5
GU	1
ND	1
NE	1
SC	1
TN	1
UT	1
VA	1
VI	1
WI	1
Total	**17**

Click on the Total number

The base report results display. Keep in mind that you will need to use the scrolling bar at the bottom of the page in order to see the information further to the right.

State	UIC	Unit Name	Branch	Site Visit Name	Site Visit Type
AL	W	Test Four	Army Reserve	Ft. Whiting and AFRC	Staff Meetings
AL	W780Y7	62ND TRP CMD FWD 7	Army National Guard	Ft. Whiting and AFRC	Staff Meetings
AL	W8AS14	DET 3 RECRUIT SUSTAINMENT	Army National Guard	Staff Meeting II	Change of Command
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	Army National Guard	MS Practice	Other Branch of Service: Br
AR	W782AA	87TH TROOP COMMAND	Army National Guard	American Legion Briefing	SRP/SRC
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	Army National Guard	Test Site Visit	Community Meeting
AR	W782AA	87TH TROOP COMMAND	Army National Guard	American Legion July 30 2014	Community Partner Collabo
AR	W7VJAA	INSTITUTE SUPPORT UNIT	Army National Guard	American Legion July 30 2014	Community Partner Collabo
GU	WY64AA	1990TH CONTIN CONTRACT TEAM	Army National Guard	1990 CCT YR	Yellow Ribbon Event: Post
ND	W78YAA	68TH TROOP COMMAND	Army National Guard	SRP - Unit Name	SRP/SRC
NE	W78RAA	92ND TROOP COMMAND	Army National Guard	JCF	Other Branch of Service: Br
SC	WPQCA0	CO A 218 CS BN	Army National Guard	Tri County Veteran Network Meeting	Community Partner Collabo
TN		135th EN BN	Army Reserve	York County Cuncil Meeting	Community Meeting
UT	WTN6D0	SPT CO 1 SF BN 19 SF GP (ABN)	Army National Guard	Staff Meeting II	Change of Command
VA	W777R0	VA RSP SITE 10 (SANDSTON)	Army National Guard	American Legion Briefing	SRP/SRC
VI	W79FAA	104TH TROOP COMMAND	Army National Guard	IPR	Staff Meetings
WI	WPK6T0	HHB 1ST BN 120TH FA	Army National Guard	102nd MP Company USAR Mob Brief	Other Branch of Service: Br

For support, please e-mail the G1 Web Application **Help Desk** or call 1-800-339-0473.

Subject To Privacy Act of 1974 (PL-93-579). For Official Use Only. This application maintains usage statistics for security and Soldier privacy protection.

Using the Report Tools section, export your document to Excel and delete any unnecessary columns or rows.

Site Visits by User State

- The number of site visits organized by user (FAS) state.

Apply time frame filters as desired, then select "Apply Filters" (page 5).

The results display.

Site Visits by User State	
Current State ▲	**# of Site Visits**
AR	23
Total	**23**

Rows 1 - 1 of 1   Select Page Size: 100   Jump To Page: 1

Drill Down by State Initials

If you click on the state initials, a listing of the FAS nodes in the system appear. You can then drill down by clicking on each FAS nod that is displayed. This will give you specifics concerning the site visit(s) completed by the person with the particular FAS node.

Site Visits by User State	
FASNode ▲	**# of Site Visits**
AR	20
AR0	1
AR1	2
Total	**23**

Rows 1 - 3 of 3   Select Page Size: 100   Jump To Page: 1

Clicking on the individual's user name ID (created by), results in a list of site visit type and number of visits by that category.

If you click on the Site Visit Type category, the specific information about the site visit(s) is displayed.

Case ID	Created By	Site Visit Date	Site Visit Type	Created Date	Number Of Attendees	Site Visit CR Names	Site Visit POC Names	Site Visit Unit Codes
298	sara.patterson2	08/26/2014	Staff Meetings	08/26/2014	19			(Test Four),780Y7(62ND TRP CMD FWD 7)

Drill Down by Number

Select the total number in the lower right side display.

Clicking on the number gives you a display of the base report information with the various site visit entry items. Remember to use the scrolling bar at the bottom of the screen to display the information further to the right.

Case ID	Created By	Site Visit Date	Site Visit Type	Created Date	Number Of Attendees	Site Visit CR Names	Site Visit PO
5	sara.patterson2	06/10/2014	Community Meeting	06/10/2014	45		
10	sundee.peterson	06/02/2014	Community Meeting	06/10/2014	23		
14	sundee.peterson	06/11/2014	Family Day/Holiday Drill	06/12/2014	45		
30	sara.patterson2	06/17/2014	Other Branch of Service: SM/FM	06/17/2014	11		
31	sundee.peterson	06/17/2014	Other Branch of Service: SM/FM	06/17/2014	5		
32	sara.patterson2	06/16/2014	Change of Command	06/17/2014	11		
33	sara.patterson2	06/13/2014	Child and Youth Event	06/17/2014	25		
34	sara.patterson2	06/16/2014	Other Branch of Service: Briefing	06/17/2014	20		
40	sara.patterson2	06/18/2014	Other Branch of Service: Briefing	06/18/2014	20		
92	sundee.peterson	06/18/2014	Other Branch of Service: Briefing	06/19/2014	23		
104	sara.patterson2	06/19/2014	Other Branch of Service: Briefing	06/19/2014	2		
120	sara.patterson2	06/20/2014	Other Branch of Service: Briefing	06/20/2014	3		
162	sara.patterson2	06/25/2014	SRP/SRC	06/26/2014	25		
171	sara.patterson2	06/25/2014	Community Partner Collaboration	06/26/2014	50		
183	sara.patterson2	06/30/2014	Yellow Ribbon Event: Post	07/01/2014	20		
201	sara.patterson2	07/02/2014	Community Meeting	07/03/2014	16		
206	sara.patterson2	07/02/2014	Local Community Event	07/03/2014	20		
210	sara.patterson2	07/09/2014	Community Meeting	07/09/2014	20		
240	sara.patterson2	07/17/2014	Market FAC Program	07/17/2014	2		
251	sara.patterson2	07/23/2014	Military Facility Visit	07/29/2014	4		
253	sara.patterson2	07/30/2014	Community Partner Collaboration	07/30/2014	40		
254	sara.patterson2	07/30/2014	Community Partner Collaboration	07/30/2014	40		
260	sara.patterson2	07/31/2014	Staff Meetings	07/31/2014	15		
298	sara.patterson2	08/26/2014	Staff Meetings	08/26/2014	19		
299	sara.patterson2	08/23/2014	SRP/SRC	08/26/2014	150		
334	sara.patterson2	09/14/2014	Other Branch of Service: Briefing	09/18/2014	172	Juan Suchi,Jane's Juice Drinks	Jane Jones,Ju

This information may also be exported to an Excel spreadsheet by going to the Report Tools section at the top of the page and clicking on the Excel icon.
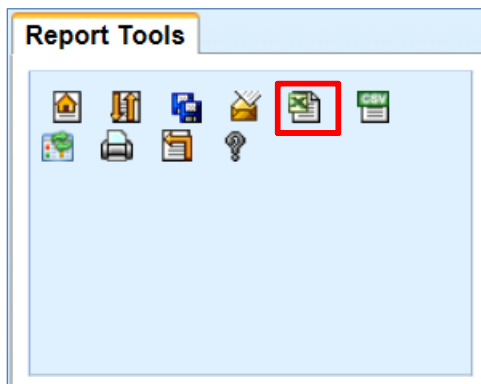
Delete rows and columns as necessary.

Briefing Reports
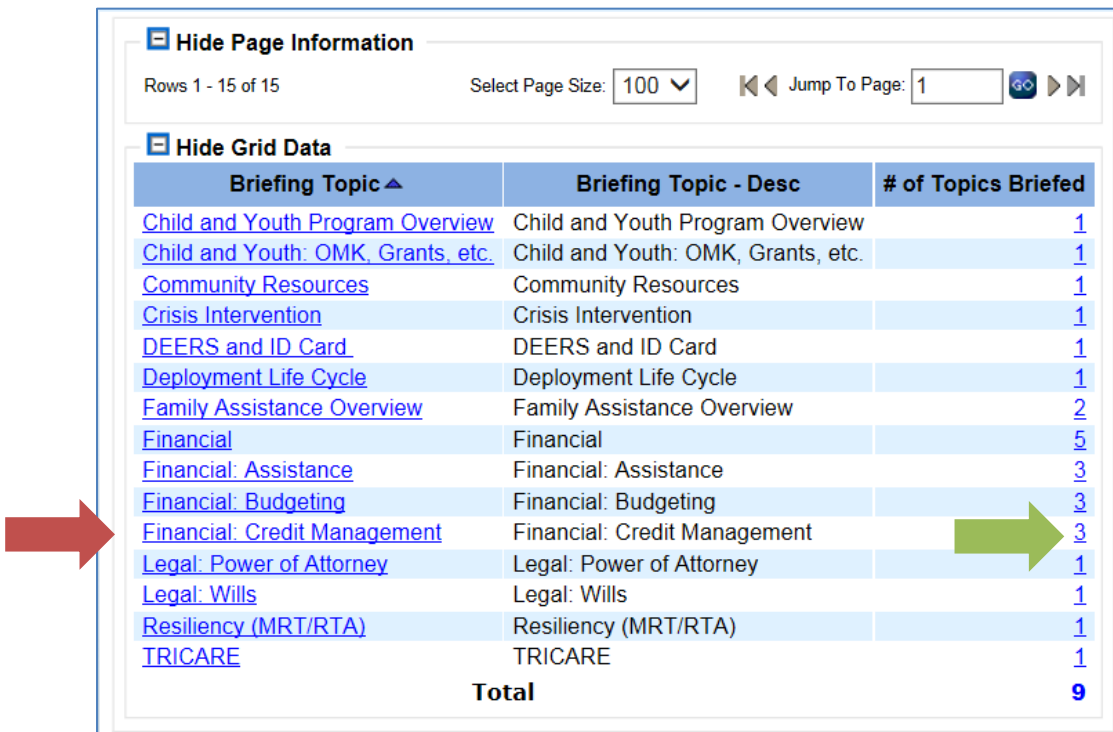
Briefed Topics

- The Briefed Topics report will return the number of topics that have been briefed. Since a briefing may cover multiple topics, it is possible for a briefing to be counted multiple times.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *Briefed Topics*. The information can be "drilled down" in different ways depending on your needs.

- To view briefings generated by a specific topic and who created the briefing, click on the topic as shown below (red arrow).
- To view a combined list of cases for a state, sorted by FAC staff, click on the number as shown below (green arrow).

Drill Down by Number Base Report Results (green arrow)

Results will display the briefing records, sorted by FAS, for the topic selected.

Drill Down by Created By Results (red arrow)

Results will display the state. To drill down to a specific FAC, click on the state, as shown below.

Drill Down by Created By Results

Results will display the individual who created the brief for the topic selected. To drill down to briefings where this topic was presented, click on the FAS name, as shown below.

Briefing Topic Created By Base Report Results

Results will display the individual who created the brief for the topic selected.

Briefed Units

- The number of units that have been briefed. Because many units may attend a single briefing, each briefing may be counted more than once in this report.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *Briefed Units*. The information can be "drilled down" in different ways depending on your needs.

- To view briefings generated for a specific unit, click on the state as shown below (red arrow).
- To view a combined list of briefings for a state, sorted by FAC staff, click on the number as shown below (green arrow).

StateID ▲	StateID - Desc	Number of Briefings (FMS)
AK	Alaska	49
AR	Arkansas	97
AZ	Arizona	28
CA	California	28
GU	Guam	14
IA	Iowa	28
KY	Kentucky	13
MS	Mississippi	14
NE	Nebraska	14
PR	Puerto Rico	101
SC	South Carolina	42
TN	Tennessee	28
TX	Texas	14
UT	Utah	93
VA	Virginia	13
WA	Washington	14
WI	Wisconsin	14
WV	West Virginia	24
Total		**628**

(Hide Grid Data)

Drill Down by Number Base Report Results (green arrow)

Results will display the briefing records for the state, sorted by unit/UIC.

State	UIC	Unit Name	Briefing Name	City	Created By	Packets Emailed	Packets Handed Out	Packets Mailed	Service Member Actual
AR	W8AXYX	W8AX ARARNG ELE JFHQ FWD 31	Test Briefing	North Little Rock	sara.patterson2	1	1	1	27
AR	W8AXYX	W8AX ARARNG ELE JFHQ FWD 31	Test Briefing	North Little Rock	sara.patterson2	1	1	1	27
AR	W8AXYX	W8AX ARARNG ELE JFHQ FWD 31	Test Briefing	North Little Rock	sara.patterson2	1	1	1	27
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	349th QM YR4	Concord	sara.patterson2		200		111
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	349th QM YR4	Concord	sara.patterson2		200		111
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	349th QM YR4	Concord	sara.patterson2		200		111
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	349th QM YR4	Concord	sara.patterson2		200		111
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	349th QM YR4	Concord	sara.patterson2		200		111
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	39th BSTB - July	Dallas	sara.patterson2	2	78	0	100
AR	WP7FB0	CO B 39TH BDE SPEC TRPS BN	39th BSTB - July	Dallas	sara.patterson2	2	78	0	100

Drill Down by State Results (red arrow)

Results will display the state. To drill down to a specific unit, click on the unit or UIC, as shown below.

Unit Briefing Base Report Results

Results will display the briefing information, to include individual who created the brief, for the unit selected.

State	UIC	Unit Name	Briefing Name	City	Created By	Packets Emailed	Packets Handed Out	Packets Mailed	Service Member Actual	Family Member Actual
AR	W8AXAA	JFHQ	Test Briefing	North Little Rock	sara.patterson2	1	1	1	27	30
AR	W8AXAA	JFHQ	Test Briefing	North Little Rock	sara.patterson2	1	1	1	27	30
AR	W8AXAA	JFHQ	Test Briefing	North Little Rock	sara.patterson2	1	1	1	27	30
AR	W8AXAA	JFHQ	Test Briefing	North Little Rock	sara.patterson2	1	1	1	27	30

Briefings by User State

- The number of briefings organized by the state of the user (FAS).

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *Briefing by User State*. The information can be "drilled down" in different ways depending on your needs.

- To view briefings generated for a specific unit, click on the state as shown below (red arrow).
- To view a combined list of briefings for a state, sorted by FAC staff, click on the number as shown below (green arrow).

Drill Down by Number Base Report Results (green arrow)

Results will display the briefing records for the state, sorted by FAS staff.

CaseID	Created By	Created Date	Briefing Method	FACC/FAS Role	Briefing Date	Family Member Actual	Service Member Actual
141	sara.patterson2	20140624	Informal Setting	Presenter And Supporter	20140622	75	100
159	sundee.peterson	20140626	Formal	Presenter And Supporter	20140624		24
168	sundee.peterson	20140626	Formal	Supporter	20140621	0	123
198	sundee.peterson	20140703	Formal	Presenter	20140701	0	50
203	sundee.peterson	20140703	Formal	Presenter	20140703	0	125

Drill Down by FAS Node Results (red arrow)

Results will display the FAS nodes. To drill down to a specific FAS, click on the FAS node, as shown below.

Drill Down by FAS Results

Results will display the FAS staff assigned to a node. To drill down to a specific FAS, click on the FAS name, as shown below.

Briefing by User State Base Report Results

Results will display the briefing information, to include individual who created the brief, for the unit selected.

Outreach Reports

Open Outreaches by User State

- The total number of outreach cases that are not in a closed or deleted status state.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *Open Outreaches by User State*. The information can be "drilled down" in different ways depending on your needs.

- To view open outreaches generated for a specific FAS, click on the state as shown below (red arrow).
- To view a combined list of open outreaches for a state, sorted by FAC staff, click on the number as shown below (green arrow).

CurrentState ▲	Number of Open Outreaches (FMS)
UT	3
Total	**3**

Drill Down by Number Base Report Results (green arrow)

Results will display the open outreach records for the state, sorted by FAS staff.

CurrentState	StartDate	EndDate	ServiceMember Name	RelatedContactName	RelationshipType
UT	8/1/2014 12:00:00 AM	8/19/2015 12:00:00 AM	FLINTSTONE FRED	Flintstone, Pebbles	Daughter
UT	9/1/2014 12:00:00 AM	12/31/2014 12:00:00 AM	FLINTSTONE FRED	FLINTSTONE, RALPH	Brother
UT	9/1/2014 12:00:00 AM	11/20/2015 12:00:00 AM	BUNNY BUGS	DUCK, DAFFY	Friend

Drill Down by State Results (red arrow)

Results will display the FAS staff assigned to a node. To drill down to a specific FAS, click on the FAS name, as shown below.

Drill Down by FAS Node Results

Results will display the FAS staff assigned to a node. To drill down to open outreach listing, click on the FAS name, as shown below.

FAS Open Outreach Base Report Results

Open Outreach results will display the FAS staff selected.

Outreach Success Rate by Client State

- The number of outreaches with successful and unsuccessful dispositions at the end of each month.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *Briefed Units*. The information can be "drilled down" in different ways depending on your needs.

- To view outreach results for a specific action, click on the number in the appropriate column. An example is shown below:

Unit State ▲	Unit State - Desc	No attempt	No attempt per client request	No response received	Successful Outreach w/ Issue	Successful No Issue
**		1	0	0	0	1
	Total	1	0	0	0	1

Hide Page Information — Rows 1 - 1 of 1 — Select Page Size: 100 — Jump To Page: 1

Results for Successful Outreach with no Issue Base Report

SM Unit State	UPC	SM Home State	Current State	Case Created By	Case Created Date	Latest Action Date	SM Full Name	Relationship Type	First Name	Middle Initial	Last Name	Emergency Contact	Enrolled In DEERS
		UT	UT	sundee.peterson	20140827	08/31/2014	FLINTSTONE FRED	Friend	Barney		Rubble	N	N

Quick Tracker Reports

Quick Tracker Status

- The number of quick trackers created by date or timeframe and the categories of the quick trackers.

Select Timeframe

Using the dropdown list in the second column, select the type of timeframe for your search. Then complete the date information in the far right section(s).

The results are displayed by State, Number of QT Entries, Material, Information, and Total. Clicking on the state initials or the numbers provides more detailed information.

State ▲	Quick Tracker Entries	Material	Information	Total
AR	17	42	51	93
Total	**17**	**42**	**51**	**93**

Click on State

A list of your FAS ID nodes appears. The numbers in the categories reflect the QT entries of each FAS staff member.

Rows 1 - 3 of 3   Select Page Size: 100   Jump To Page: 1

FAS ▲	Quick Tracker Entries	Material	Information	Total
AR0	13	32	41	73
AR1	2	7	7	14
AR7	2	3	3	6
Total	**17**	**42**	**51**	**93**

Drill down by the FMP-ID

By clicking on the FAS-ID, the individual User Name appears and the QT information for that individual is displayed.

User Name △	Quick Tracker Entries	Material	Information	Total
sara.patterson2	2	3	3	6
Total	**2**	**3**	**3**	**6**

Drill Down by User Name Base Report

Click on the User Name and the information is further displayed starting with QT category Type, QT Number of Entries, Material, Information, and Totals.

Hide Page Information

Rows 1 - 2 of 2   Select Page Size: 100 ⌄   Jump To Page: 1 GO

Hide Grid Data

Type △	Quick Tracker Entries	Material	Information	Total
Child and Youth Related	1	3	0	3
Community Outreach/Partnerships	1	0	3	3
Total	**2**	**3**	**3**	**6**

Drill Down by Type Base Report

Click on the item listed in the Type column and the information is further broken down by Date, Materials, Information, User Name, Type, Description, Branch, and Deployment Status

Hide Page Information

Rows 1 - 1 of 1   Select Page Size: 100 ⌄   Jump To Page: 1 GO

Hide Grid Data

Date	Materials	Information	User Name	Type	Description	Branch	Deployment Status
20140822	0	3	sara.patterson2	Community Outreach/Partnerships	• Community/Individual Donations • Community Partnerships • Offer of Donation and/or Holiday Adoption • Marketing Events • Volunteer Opportunities/Services	Army National Guard	Pre-Deployment

Quick Track Entries

Quick Track Entries is the number of times entries have been made in the system. Click on the number in the column.

Drill Down to the Quick Track Entries Base Report

By clicking on the number in the QT Entries, the displayed information shows what items were quick tracked.

Drill Down by Materials

Click on the Materials number to display the items that were entered as QT materials

The base report information is then displayed by Date, Number of Materials, Information, User Name, Type, Description, Branch, and Deployment Status.

Date	Materials	Information	User Name	Type	Description	Branch	Deployment Status
20140822	3	0	sara.patterson2	Child and Youth Related	• Child and Youth Programs • Child Care Funding • Child Care Programs and Provider Referral • Deployment Information/Child and Youth • Family Readiness Youth Groups • Military Youth Contributing to Youth Programs • Youth Activities (Youth Camps/Youth Groups: Paperwork, Applications, etc.)	Army National Guard	Pre-Deployment
20140825	1	0	sara.patterson2	Child and Youth Related	• Child and Youth Programs • Child Care Funding • Child Care Programs and Provider Referral • Deployment Information/Child and Youth • Family Readiness Youth Groups • Military Youth Contributing to Youth Programs • Youth Activities (Youth Camps/Youth Groups: Paperwork, Applications, etc.)	Army	Pre-Deployment
20140825	6	7	sara.patterson2	Family Assistance	• Educational Materials • FAC Program Information	Army	Pre-Deployment
20140909	3	0	sara.patterson2	Financial	• Budget Counseling • Education Materials • Personal Financial Management • Tax Assistance (W2s or Tax Preparation)	Army	Pre-Deployment
20140909	7	0	sara.patterson2	ID Cards	• DEERS Enrollment • Eligibility • ID Card Locations • Required Paperwork for ID Card	Army	Pre-Deployment
20140924	3	0	sara.patterson2	Community Outreach/Partnerships	• Community/Individual Donations • Community Partnerships • Offer of Donation and/or Holiday Adoption • Marketing Events • Volunteer Opportunities/Services	Army National Guard	Pre-Deployment
20140926	4	0	sara.patterson2	Community Outreach/Partnerships	• Community/Individual Donations • Community Partnerships • Offer of Donation and/or Holiday Adoption • Marketing Events • Volunteer Opportunities/Services	Army National Guard	Unknown
20140926	2	0	sara.patterson2	Deployment/Mobilization Support	• Care Packages • Deployed Units/Mailing Address • Education Materials • Homecoming Location/Timeframe • Medical Hold/Line of Duty/MMSO Questions • Mobilization/Reintegration Location/Timeframe • Pre-Mobilization Location/Timeframe • Reintegration with local Unit • Reunion Briefings • YRRP Event Information	Army National Guard	Unknown
20140929	11	0	sara.patterson2	Death and Survivor Benefits	• Information and Referral • Survivor Benefit Plan	Coast Guard	Non-Deployed
20140929	2	0	sara.patterson2	Education: Youth	• Education Grant/Scholarship Information from Local/National Programs • Military Child Education Coalition (MCEC)	Coast Guard	Non-Deployed

Drill Down by Information

Click on the Information number to drill down for the Information QT details.

The base report information displayed is by Date, Materials, Information, User Name, Type, Description, Branch, and Deployment Status.

Drill Down by Total

Click on the number in the Total column to display all the information.

The base report information displayed shows the QT's by Date, Material, Information, User Name, Type, Description, Branch, and Deployment Status.

Export Information to Excel

Click the Excel icon in the Report Tools section. When prompted select Save or Open the document. To make adjustments, select Enable Editing. Delete columns or rows as necessary.

Other Reports

FAS Detailed

- The number of briefings, site visits, outreach attempts, cases, and quick trackers by time period enter by a FAS.

Home Report

Apply time frame filters as desired, then select "Apply Filters" (page 5).

Shown below is the home report for *FAS Detailed.* The information can be "drilled down" in different ways depending on your needs.

- To view FAS Details generated for a specific state, click on the state as shown below (red arrow).
- To view a combined list of briefings/site visits/outreaches/cases for a state, sorted by FAC staff, click on the number in the column desired, as shown below (green arrow).

Drill Down by Number Results (green arrow)

Results will display the records – for the column selected – for the state, sorted by FAS staff.

Drill Down by State Results (red arrow)

Results will display the FAS staff assigned to a node. To drill down to a specific FAS node, click on the FAS name, as shown below.

Drill Down by FAS Node Results

Results will display the FAS staff assigned to a node. To drill down to a specific FAS node, click on the FAS name, as shown below.

FAS Detail Base Report Results

Results will display the FAS staff selected. You will need to scroll along the bottom of the screen to see all the results for briefings, site visits, outreach, and cases.