

**U.S. COAST GUARD**  
**Work Life Information Management System (WIMS)**

**Critical Incident Stress Management (CISM)**  
**User Guide**

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## How to Enter a CISM Incident

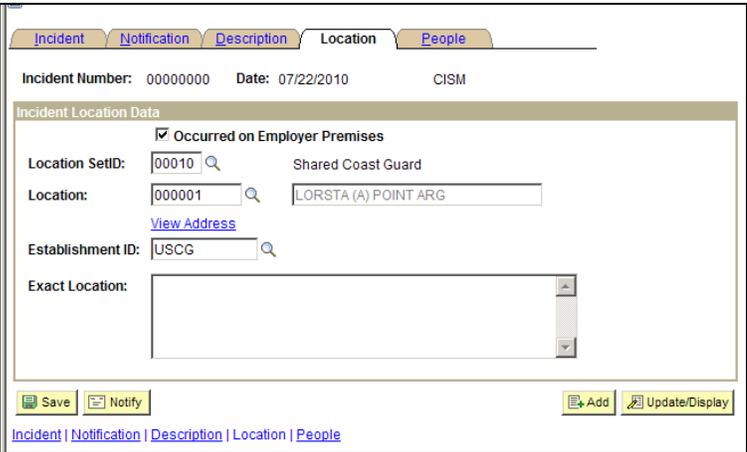
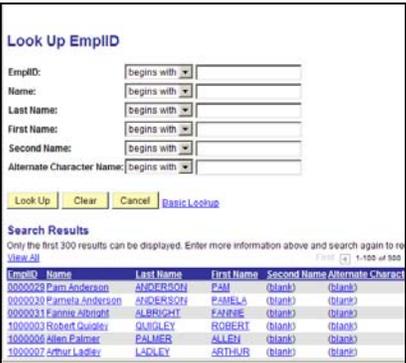
**Use** When there is a Critical Incident Stress Management (CISM) Incident it is entered into the system for tracking. This information is maintained on the **Incident Details** page.

- Pages**
- Incident
  - Notification
  - Description
  - Location
  - People

Step	Action
1	<p>To add a new incident, click on <b>Incident Details</b>:</p> <div data-bbox="560 766 1205 1075" data-label="Image"> </div> <ul style="list-style-type: none"> <li>• Select the <b>Add a New Value</b> tab.</li> </ul> <div data-bbox="609 1201 1115 1528" data-label="Image"> </div> <ul style="list-style-type: none"> <li>• Click on the <b>Add</b> button. The system automatically assigns an incident number. Please do not enter a number for a new incident.</li> </ul>

Step	Action
2	<p>On the <b>Incident</b> tab, do the following:</p> <ul style="list-style-type: none"> <li>• <b>Incident Date:</b> Enter without special characters in MMDDYYYY format, or use the calendar icon to select the date. The formatting is automatic upon saving or tabbing to the next field. The Incident Date must be the earliest date of any occurrence regarding this incident. When you get to the Notification tab, you will be prompted to enter a notification date. This notification date cannot be earlier than the Incident Date.</li> <li>• <b>Incident Type:</b> From the drop down option, select <b>CISM</b></li> <li>• <b>Incident Time</b> and time zone: This is a required field so if the time is unknown, check the field of <b>Time Undetermined</b> box. Please do not check the <b>Time Undetermined</b> box <i>AND</i> enter a time. Use only one or the other.</li> <li>• <b>Resulted in Injury or Illness:</b> This is a required field. Check the box.</li> <li>• <b>Is this a Recurrence:</b> Leave blank. Please do <i>NOT</i> use this for CISM.</li> <li>• <b>Investigated:</b> Leave blank. Please do <i>NOT</i> use this for CISM.</li> </ul> <div data-bbox="548 1041 1214 1440" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>The screenshot shows a web form for creating an incident. At the top, there are tabs for 'Incident', 'Notification', 'Description', 'Location', and 'People'. The 'Incident' tab is active. The form contains the following fields and options:</p> <ul style="list-style-type: none"> <li>Incident Number: 00000000</li> <li>Incident Date: 07/22/2010 (with a calendar icon)</li> <li>Incident Type: CISM (dropdown menu)</li> <li>Incident Time: [ ] PST (dropdown menu) and <input checked="" type="checkbox"/> Time Undetermined</li> <li>Regulatory Region: USA (dropdown menu) with a search icon and 'United States' text.</li> <li>Is This a Recurrence: <input type="checkbox"/></li> <li>Resulted in Injury or Illness: <input type="checkbox"/></li> <li>Investigated: <input type="checkbox"/></li> </ul> <p>At the bottom of the form, there are buttons for 'Save', 'Notify', and 'Add'. Below the buttons are navigation links: Incident   Notification   Description   Location   People.</p> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button.</li> <li>•  Use the <b>Notepad</b> to enter any additional information on the incident. To access the <b>Notepad</b>, click the icon. Please refer to the instructions on “<i>How to Use the Notepad.</i>”</li> </ul> <p><b>Note:</b> You must save prior to using the Notepad otherwise the note created will not be attached to the Incident.</p>

Step	Action
3	<p>Select the <b>Notification</b> tab and enter the following data:</p> <ul style="list-style-type: none"> <li>• <b>Date Reported:</b> This cannot be a date earlier than the Incident Date.</li> <li>• <b>Time Reported:</b> Enter as military time and upon save it will be formatted to regular time and AM/PM. If unknown, leave the field blank.</li> <li>• <b>Reported To EmplID:</b> Click on the magnifying glass icon , and choose the person that the incident was reported to initially. If unknown, leave the field blank.</li> <li>• <b>Reported By EmplID:</b> Click on the magnifying glass icon , and choose the EAPC entering and managing the incident.</li> <li>• <b>Reported By Non-EmplID:</b> Leave blank. Please do not use for CISM.</li> <li>• <b>Date Recorded:</b> Keep the default date (today's date).</li> <li>• <b>Time Recorded:</b> Enter time as military time and upon save it will be formatted to regular time and AM/PM.</li> </ul> <div data-bbox="646 905 1252 1234" data-label="Form"> </div>
4	<p>Select the <b>Description</b> tab</p> <ul style="list-style-type: none"> <li>• Type in the details of the incident in the large text box.</li> </ul> <div data-bbox="532 1350 1268 1766" data-label="Form"> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button.</li> </ul>

Step	Action
5	<p>Select the <b>Location</b> tab and enter the following data:</p> <ul style="list-style-type: none"> <li>• <b>Occurred on Employer Premises:</b> Please check the box.</li> <li>• <b>Location SetID:</b> Enter 00010</li> <li>• <b>Location:</b> Select the magnifying glass icon and select the location of the incident.</li> <li>• <b>Establishment ID:</b> Enter USCG</li> <li>• <b>Exact Location:</b> This is an optional description. Enter if known.</li> </ul> 
6	<p>Select the <b>People</b> tab to add <b>BOTH</b> Alleged Offender(s) and the Victim(s) to an incident.</p> <ul style="list-style-type: none"> <li>• Select the <b>EmplID</b> or <b>Non-EmplID</b> (refer to instruction on “<i>How to Add a Non Employee</i>”) by clicking on the magnifying glass icon next to the field.</li> </ul> 

Step	Action
	<ul style="list-style-type: none"> <li>• After the EMPLID has been selected, select the <b>Role</b> from the drop down box as <b>CISM Team</b></li> <li>• To add more than one person associated to this incident, click the [+] and the steps to add a person.</li> </ul> <div data-bbox="516 447 1222 791" data-label="Image"> <p>The screenshot shows a web-based application interface for incident management. The top navigation bar includes tabs for 'Incident', 'Notification', 'Description', 'Location', and 'People'. The main content area displays incident details: Incident Number: 70000010, Date: 07/22/2010, Incident Type: CISM. Below this, there's a section titled 'People Connected to this Incident' with a search bar and a list of people. The first entry shows EmpID: 1000006, Name: Allen Palmer, Role: CISM TEAM. There are buttons for '+', '-', and 'X' next to the entry. A 'Causes' section is visible with a dropdown menu showing 'Substance Abuse Causes'. At the bottom of the interface, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.</p> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button after you have added all people connected to this incident.</li> </ul>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>WorkLife Program</b> pagelet to continue, or select the <b>Sign Out</b> hyperlink. It is helpful for later activities to write down the incident number.</p>

## How to Add and Manage a Corrective Plan

- Use** The primary purpose of the Corrective Plan is to manage a CISM incident through resolution.
- Prerequisites** Incident Details must be completed prior to entering a Corrective Plan.
- Pages** Corrective Plan

- 1 Create a **Corrective Plan** by first search for the entering the **Incident Number** or **Incident Type** as *CISM*.

Identify Corr/Prevent Actions  
Enter any information you have and click Search. Leave fields blank for a list of all values.

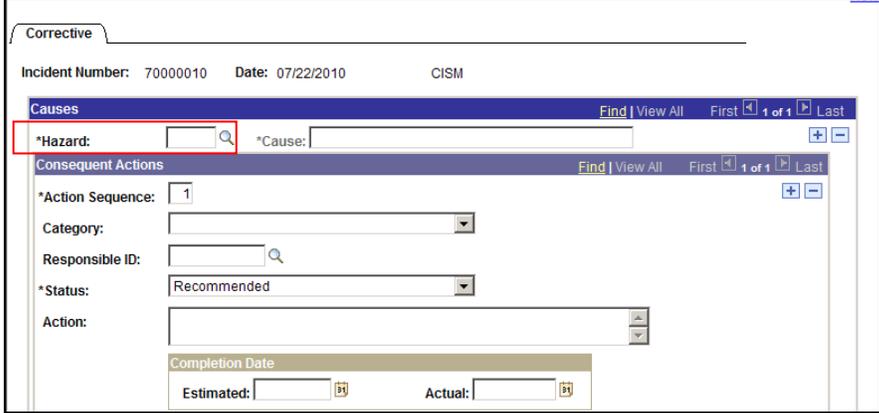
Find an Existing Value

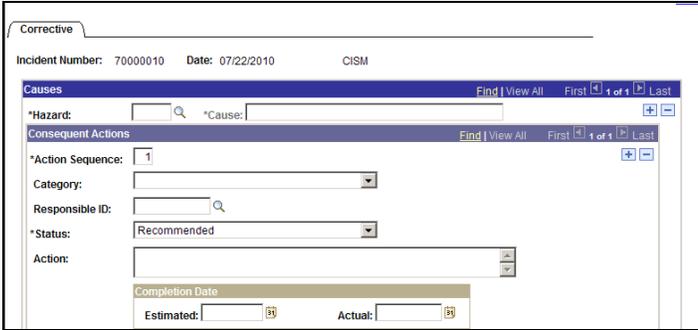
Incident Number: begins with

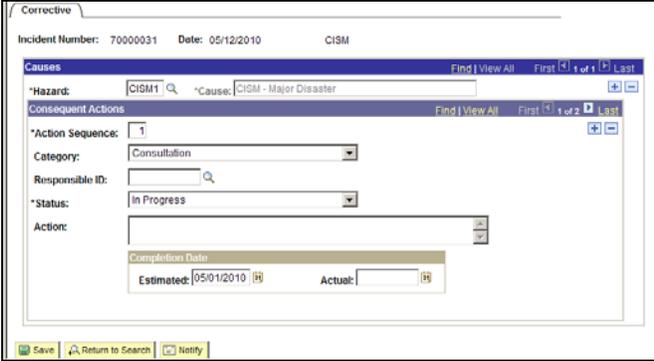
Incident Type: = CISM

Search Clear Basic Search Save Search Criteria

- If known, enter the incident number and click the **Search** button.
- If not known, select CISM for the **Incident Type**, leave the **Incident Number** field blank and click the search button and select the correct incident from the list. This can generate a lot of results, so it is better to have the incident number.

Step	Action
2	<p data-bbox="397 268 1344 342">On the <b>Corrective Page</b>, click on the magnifying glass icon  to look up the <b>Hazard</b> type from the list presented:</p> <div data-bbox="451 380 1330 793"></div> <p data-bbox="397 835 885 867">Click on one of the following options:</p> <ul data-bbox="592 871 1323 1245" style="list-style-type: none"><li>• <b>CISM1</b><ul style="list-style-type: none"><li>○ Cause: <b>CISM – Major Disaster</b></li></ul></li><li>• <b>CISM2</b><ul style="list-style-type: none"><li>○ Cause: <b>CISM – Operational – CG</b></li></ul></li><li>• <b>CISM3</b><ul style="list-style-type: none"><li>○ Cause: <b>CISM – Operational – Non CG</b></li></ul></li><li>• <b>CISM4</b><ul style="list-style-type: none"><li>○ Cause: <b>CISM – Non Operational – CG</b></li></ul></li><li>• <b>CISM5</b><ul style="list-style-type: none"><li>○ Cause: <b>CISM – Non Operational – Non CG</b></li></ul></li></ul>

Step	Action
2	<p>In the <b>Consequent Actions</b>, create an Action Sequence. The <b>Action Sequence</b> number is system-generated. Please do not change this number.</p>  <p>In the <b>Category</b> field, select the drop down and choose from one of the following options:</p> <ul style="list-style-type: none"><li>➤ <b>Consultation</b></li><li>➤ <b>One on One</b></li><li>➤ <b>Defusing</b></li><li>➤ <b>CISDs</b></li><li>➤ <b>CMBs</b></li><li>➤ <b>Demobilization</b></li></ul> <p>In the <b>Status</b> field, select the drop down and choose from one of the following options:</p> <ul style="list-style-type: none"><li>➤ <b>In Progress</b></li><li>➤ <b>Completed</b></li><li>➤ <b>Recommended</b></li><li>➤ <b>Existing</b></li><li>➤ <b>Planned</b></li></ul> <p>In the <b>Action</b> text box, enter the details of the Action to be taken.</p>

Step	Action
2	<p>In the <b>Completion Date</b> box, enter the <b>Estimated</b> date and/or <b>Actual</b> date for each Action Sequence by entering the date (MMDDYYYY), or click on the calendar icon to select a date.</p>  <ul style="list-style-type: none"> <li>• Select the <b>Save</b> button when you are finished adding the <b>Consequent Actions</b>.</li> <li>• To add more Actions, click on the [+] in the right corner of the Consequent Actions area and follow the steps to add <b>Consequent Actions</b>.</li> </ul> <p><i>Note:</i> The incident will remain unresolved and “open” in the system until the <b>Status</b> has been set to “Completed,” and the <b>Actual Completion Date</b> has been entered. Until such time, the CG 1750 Intervention Report will be generated every 24 hours.</p>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>WorkLife Program pagelet</b> to continue, or select the <b>Sign Out</b> hyperlink.</p>

### How to Run a Worklife Report

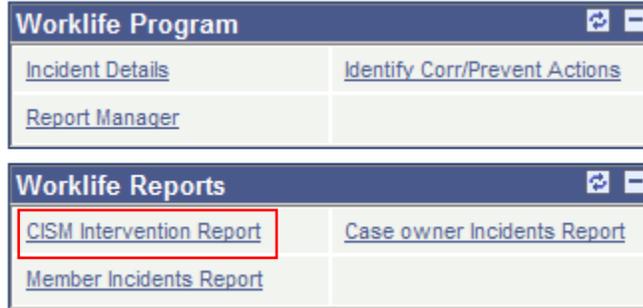
**Use** Worklife Report hyperlinks are housed in the Worklife Reports pagelet. Click on the hyperlink of the desired report to run and retrieve the output. Descriptions of the reports accessible to the Worklife Family Advocacy User are located below.

- Prerequisites**
- Incident Details
  - Correct Plan

Portal Link/Report Title	Description
Incidents without Close Dates	This query generates a list of Incidents that have an open status. The Close Date field is blank on the Claims page. The Manage Claims components main function is to maintain the status of an Incident and the Assignment Flag tied to a member.
Critical Incident Stress Management (CISM) Report	This query generates a list of Incidents that
Member Incidents Report	This query generates a list of Incidents by members who are associated with an Incident. The system will prompt you for an EmplID of the Member you want to run the report for.

Step	Action
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In the **Worklife Reports** pagelet click on the [CISM Intervention Report](#) hyperlink:



The system will automatically run the report and the report output will pop up in a new window.

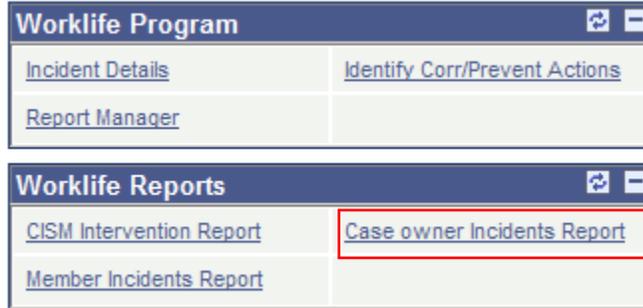
**CG\_CISM\_24HR\_NOTIFY- CISM 24hr Intervention Report**

No matching values were found.

Incident Nbr	Incdnt Dt	Report By Empl	Reported by Name	Date Reptd	Incident People ID	Incident People	Incident Role	Hazard ID	Hazard	Action	Estimated Complete Date
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Step	Action
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1 In the **Worklife Reports** pagelet click on the [Case Owner Incident Report](#) hyperlink:



A prompt will pop up in a new window.

Reported By EmplID(Case Owner):

Incident #	Incident Type	Date Reported	Incident Date	Report By	Name	Incident Time
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- Enter the Reported By EmplID (Case Owner):
- Click View Results

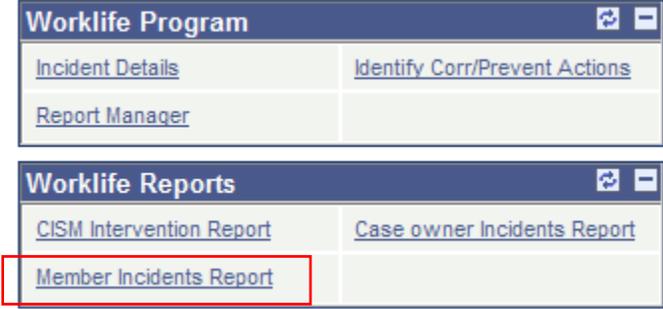
The report output will display in the following format

Reported By EmplID(Case Owner):

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) (1 kb)

View All First  1-6 of 6  Last

	Incident #	Incident Type	Date Reported	Incident Date	Report By	Name	Incident Time
1	00013426	Special Needs	10/07/1998	10/07/1998	1125801	MARTA DENCHFIELD	
2	00015159	Special Needs	11/05/2002	11/05/2002	1125801	MARTA DENCHFIELD	
3	00015196	Special Needs	11/21/2002	11/21/2002	1125801	MARTA DENCHFIELD	
4	00015359	Special Needs	03/05/2003	03/05/2003	1125801	MARTA DENCHFIELD	
5	00015219	Special Needs	12/03/2002	12/03/2002	1125801	MARTA DENCHFIELD	
6	00013982	Special Needs	01/03/2000	01/03/2000	1125801	MARTA DENCHFIELD	

Step	Action
1	<p>In the <b>Worklife Reports</b> pagelet click on the <a href="#">Member Incident Report</a> hyperlink:</p>  <p>A prompt will pop up in a new window.</p>  <ul style="list-style-type: none"> <li>• Enter the Member EmplID:</li> <li>• Click View Results</li> </ul> <p>The report output will display in the following format</p> 