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

Special Needs Program
User Guide

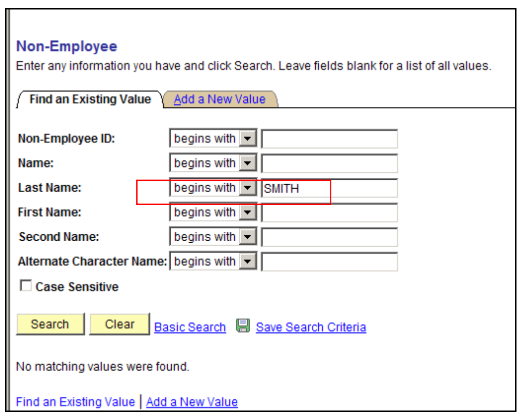
Table of Contents

How to Add a Non Employee

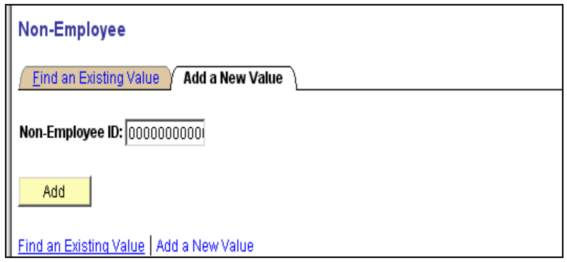
Use When there is an incident involving a non-USCG member, they must be added to the system. The user will take the following actions to add a non-employee.

Pages

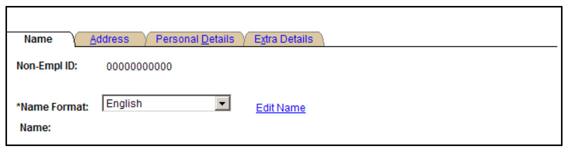
- Name
- Address
- Personal Details
- Extra Details

Step	Action
1	First search to see that the person doesn't already exist in the system by navigating to the **Non-Employee.**
2	• Enter the person's Last Name and click the **Search** button. • If there are "**no matching values found"**, select the **Add a New Value** tab (Step 3). • If the person exists in the system, proceed directly to the instructions for each program on entering an Incident.  *Note: If non-employees share the same first and last name, identify based on address or other unique information.*

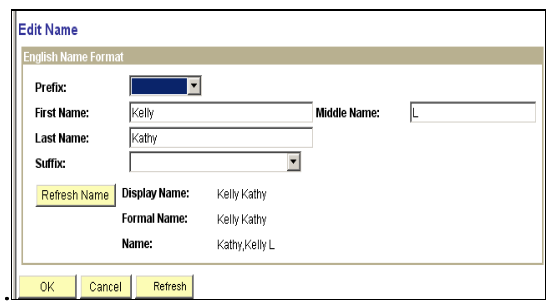
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Select the Add button.



Upon Save, the system will automatically generate the Non-Employee ID number. Please do NOT type one in.</td></tr>
<tr><td>4</td><td>Select the Edit Name hyperlink to add the persons name to the system.



Enter the First Name, Middle Name (if known) and the Last Name into each field provided.
Prefix and Suffix are optional fields.



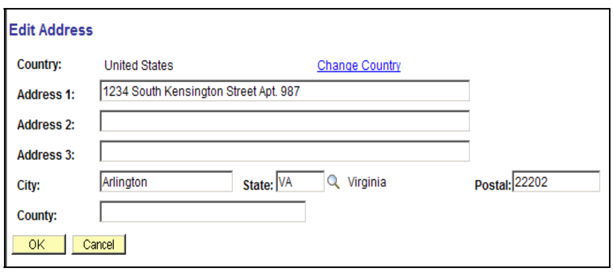
Click the OK button
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
Select the Address tab.

Country defaults to USA. You can click on the magnification glass icon to change the Country if it is one other than the USA default.
Click on the Edit Address hyperlink

On the Edit Address page, enter the following information

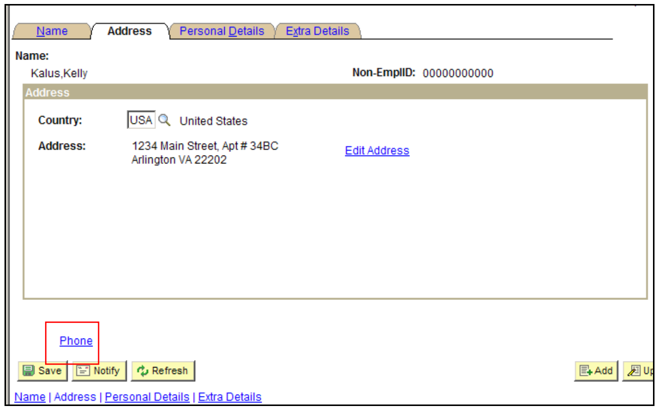
Address is the street address (and apt if applicable) for the non-employee.
City
State: Use the two letter postal abbreviation for the state or click on the magnification glass icon and choose State.
Postal is the five-digit zip code (if known).



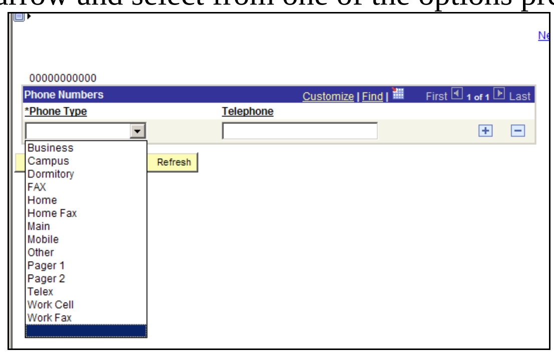
Select the OK button.

Note: Do not use Address 2, Address 3 or the County fields.
</td></tr>
</table>

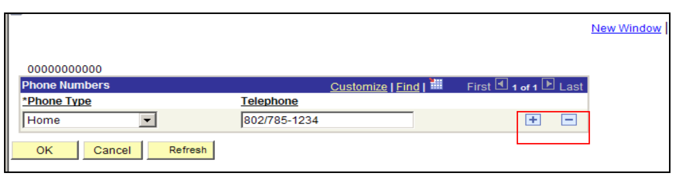
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>
Select the Phone hyperlink at the bottom of the Address tab to enter the phone number (if known).



Select the Phone Type, i.e., Work or Home, by selecting the down arrow and select from one of the options presented.



In the Telephone field after selecting the phone type, enter the phone number without any special characters (8027851234). The number will be reformatted automatically.
Click on the “+” or “-“ buttons to add or delete telephone numbers.

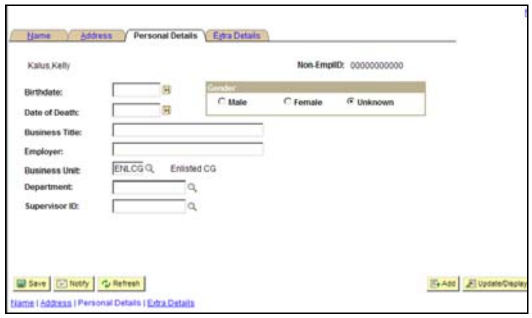


Select the OK button when finished adding or deleting numbers.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

Click the **Personal Details** tab. There are only two fields being used on this page for non-employees: **Birthdate** and **Gender**.

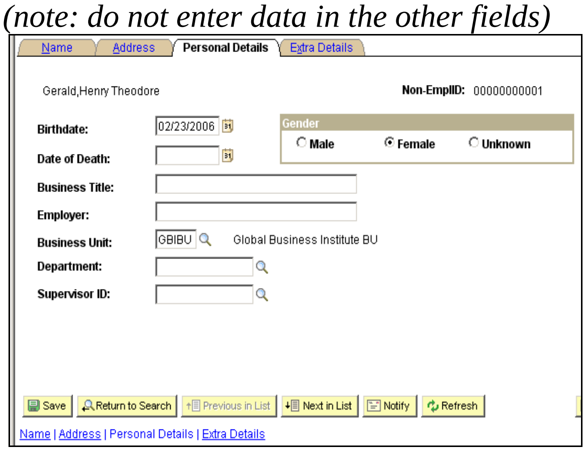
- In the **Birthdate** field, enter the birth month, day and year (*092468*)



Or, select the calendar icon and select the date from the calendar.

- Select radio button for **Gender** (Male, Female or Unknown)

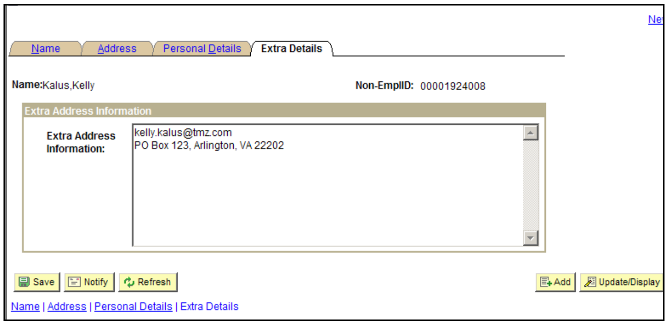
(note: do not enter data in the other fields)



- Select the **Save** button.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Click the Extra Details tab to enter additional contact information.



- Select the **Save** button.

***Note**: After saving, the Non-EmplID will be assigned and displayed.*</td></tr>
</table>

How to Enter a Special Needs Incident

Use When there is Special Needs referral for a dependent of a member, it must be entered into the system as an Incident. The user will take the following actions to add the Incident Details

Prerequisite

- Add the Dependent as a Non Employee

Pages

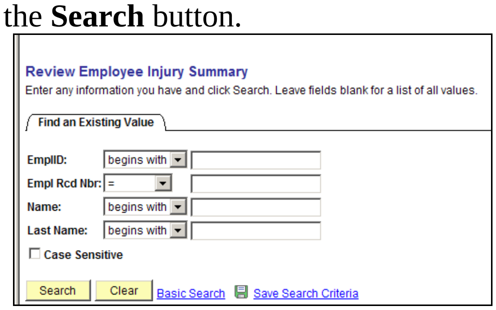
- Incident
- Notification
- Description
- People
- Location

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Check to see if there are any other Special Needs incident/referral for a USCG Member to determine a recurrence (Step 3) by doing the following from the Portal :

- Click on the **Employee Incident Summary**

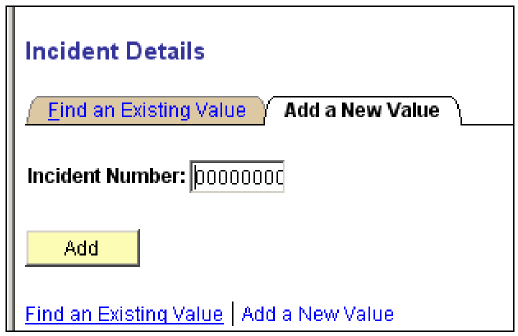
- Enter person's Last Name (or if you have the EMPLID)
- Select the **Search** button.



Note: If there is another Special Needs incident in the system involving the USCG Member (*does not search for Non Employees*) you will use this information to check the box in **Step 3 - Is This a Recurrence).**

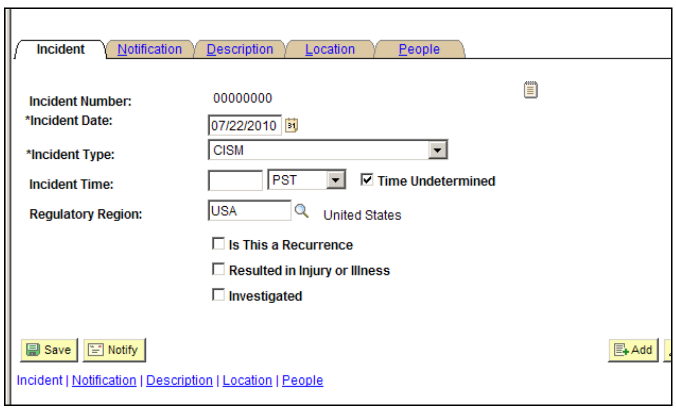
- To proceed to the next step, click the **Home** hyperlink in the top right corner of the page to return to the Portal page.

</td></tr>
</table>

Step	Action
2	To add a new incident, click on **Incident Details**:  • Select the **Add a New Value** tab**.**  • Click on the **Add** button. The system automatically assigns an incident number. Please do not enter a number for a new incident.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>On the Incident tab, do the following:

• Incident Date: 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.
• Incident Type: From the drop down option, select Special Needs
• Incident Time and time zone: This is a required field so if the time is unknown, check the field of Time Undetermined box. Please do not check the Time Undetermined box AND enter a time. Use only one or the other.
• Resulted in Injury or Illness: This is a required field. Check the box.
• Is this a Recurrence: If applicable, check the box. Refer to Step 1 on Reviewing Employee Injury Summary.
• Investigated: Leave blank. Please do NOT use this for Special Needs.



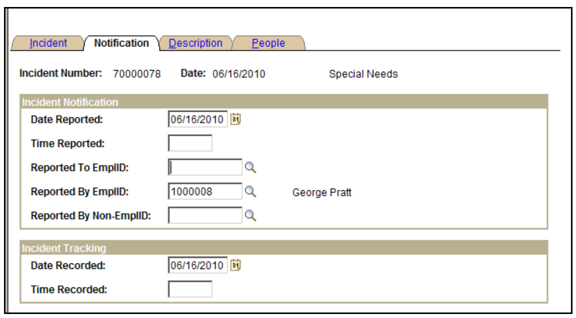
• Click the Save button.

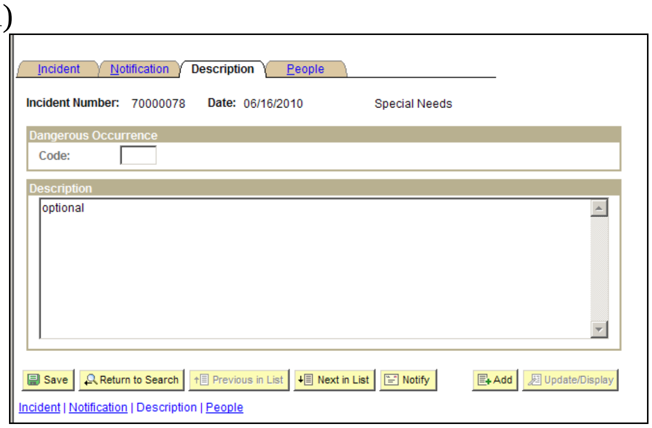
• Use the Notepad to enter any additional information on the incident. To access the Notepad, click the icon. Please refer to the instructions on “How to Use the Notepad.”

Note: You must save prior to using the Notepad otherwise the note created will not be attached to the Incident.</td></tr>
</table>

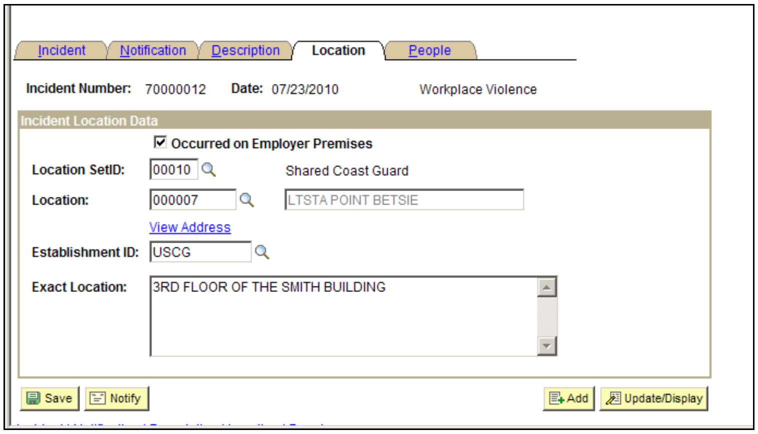
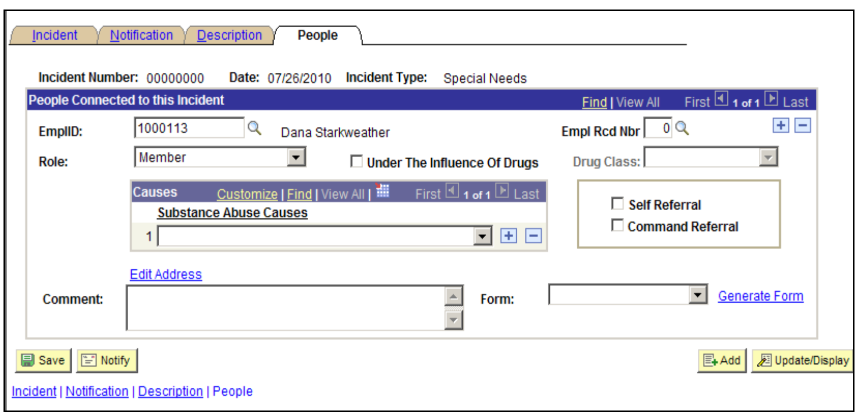
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Select the Notification tab and enter the following data:

Date Reported: This cannot be a date earlier than the Incident Date.
Time Reported: Enter as military time and upon save it will be formatted to regular time and AM/PM. If unknown, leave the field blank.
Reported To EmplID: Click on the magnifying glass icon, and choose the person that the incident was reported to initially. If unknown, leave the field blank.
Reported By EmplID: Click on the magnifying glass icon, and choose the FAR entering and managing the incident.
Reported By Non-EmplID: Leave blank. Please do not use for Special Needs.
Date Recorded: Keep the default date (today’s date).
Time Recorded: Enter time as military time and upon save it will be formatted to regular time and AM/PM.



</td></tr>
<tr><td>5</td><td>Select the Description tab, and type in the details of the incident in the large text box. (optional)


</td></tr>
</table>

Step	Action
6	Select the **Location** tab and enter the following data: • **Occurred on Employer Premises**: Check the box. • **Location SetID**: Enter 00010. • **Location**: Select the magnifying glass icon and select the ***Location*** of the incident. • **Establishment ID**: Enter USCG • **Exact Location:** This is an optional description. Enter if known. 
7	Select the **People** tab to add the USCG Member by EmplID by clicking on the magnify glass icon next to the field. • Select the **Role** from the drop down list and choose **Member.**  • Select the **Save** button. • Add the USCG Member's Dependent (s) by clicking on the [+], and selected the Non EmplID using the magnify glass icon next to the field. • Select the **Role** from the drop down list and choose **Dependent**
	To proceed, click the **Home** hyperlink in the top right corner of to return to Portal, **Work Life Program** pagelet to continue, or select the **Sign Out** hyperlink. It is helpful for later activities to write down the incident number.

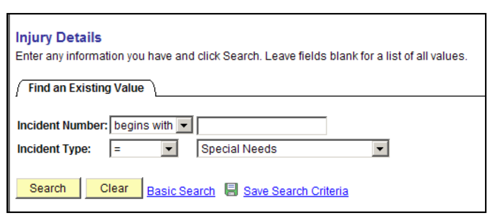
How to Associate an Injury with an Incident

Use The Member must be associated with the Injury Details as a prerequisite to set the Assignment Flag of a USCG member. The user will take the following actions to associate the Member to the Injury Details:

Prerequisites
- Incident Number

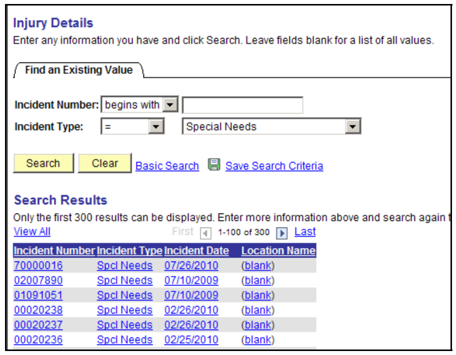
Pages
- Injury

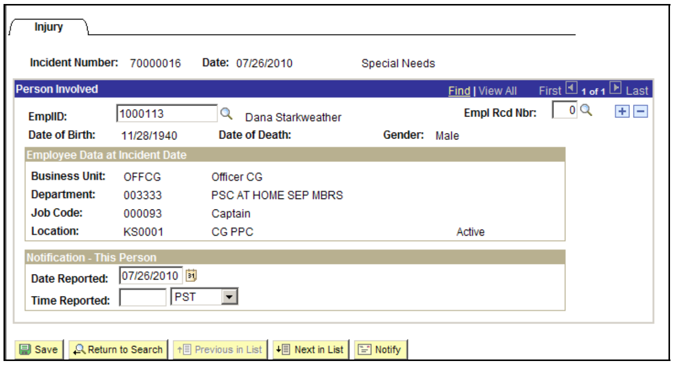
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Portal, Worklife Program pagelet do the following:
Click on Incident/Injury – Member Setup


If known, enter the incident number and click the Search button.
If not known, select Special Needs 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.


Click the Search button</td></tr>
</table>

- Select the Incident from the search, by clicking on the Incident Number hyperlink.



Step	Action
2	On the **Injury** Page, select the EmplID by doing the following: • Click on the magnify glass next to the EmplID select the member. • **Date Reported:** Enter the date in MMDDYYYY format without any special characters (auto formats upon save), or use the calendar icon to select the date. This cannot be a date earlier than the Incident Date.  • Click the **Save** button.
	To proceed, click the **Home** hyperlink in the top right corner of to return to Portal, **Work Life Program** pagelet to continue, or select the **Sign Out** hyperlink. It is helpful for later activities to write down the incident number.

How to Add and Manage the Case Status and set an Assignment Flag

Use

The primary purpose of the Open Claim functionality is to:

- Set Assignment Flag with a Claim Status = **Approved** (Criteria Met).
- Remove Assignment Flag = **Closed Date** (no change to status)

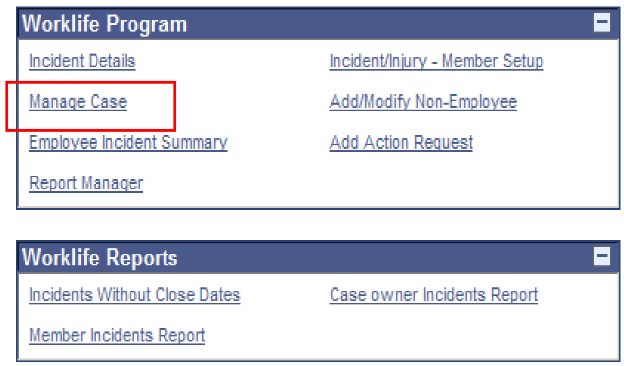
When a USCG member and has an ***open*** Special Needs Incident, the Assignment Officer is alerted to contact Work Life.

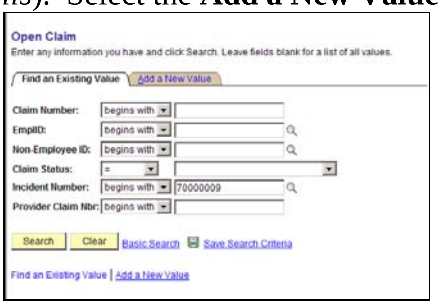
Prerequisites

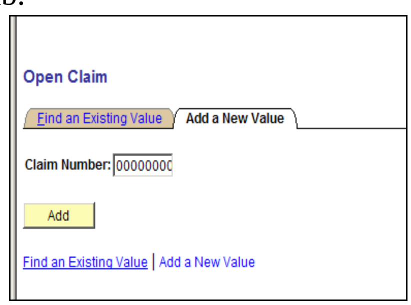
- Incident Details
- Injury

Pages

- Claim Details

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In the Worklife Program pagelet click on the Manage Case hyperlink:


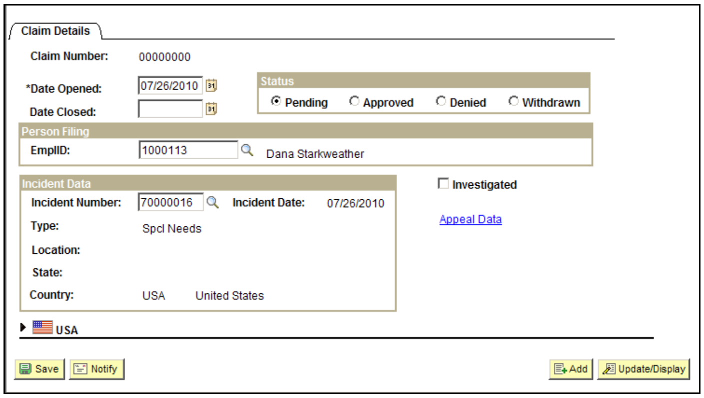
At the Open Claim search page, enter the Incident # (refer to Incident Details). Select the Add a New Value tab.




• Click on the Add button. The system automatically assigns an incident number. Please do not enter a number for a new incident.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>On the Claims Details page the Date Opened and Status = Pending are the defaults in the system. Take the following steps:

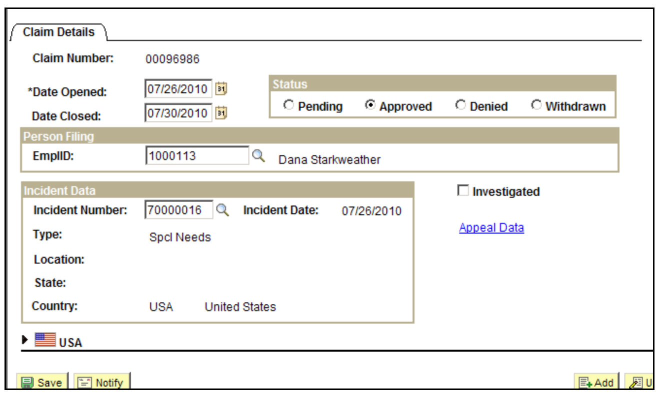
The Person Filing is the USCG Member EmplID that you will be setting the Assignment Flag on in the system.
Enter the EmplID into the field (do not use Non-EmplID), or use the magnifying glass icon to search and select the EmplID for the USCG member.
In the Incident Data, all incidents for the selected EmplID (USCG member) will be listed (note: if there are none, then refer to the instructions on “How to Add an Incident”).
Select the active incident by clicking on the incident number hyperlink of the list presented.



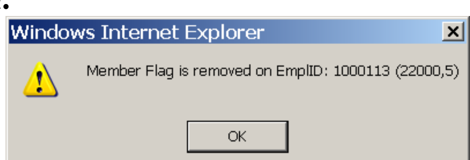
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>To set the Assignment Flag on the member selected, click on the Approved radio button.
Select the Save button.
The following message will be displayed to indicate the Member Flag was set:

Select the OK button.</td></tr>
<tr><td></td><td>To remove the Assignment Flag do the following:
Enter the Date Closed by entering the date or use the calendar to select a date. Do NOT change the claim status. It must remain Approved.



Select the Save button.
The following message will be displayed to indicate the Member Flag was removed:



Select the OK button.</td></tr>
<tr><td></td><td>To proceed, click the Home hyperlink in the top right corner of to return to Portal, Work Life Program pagelet to continue, or select the Sign Out hyperlink. It is helpful for later activities to write down the incident number.</td></tr>
</table>

How to Run a Worklife Report

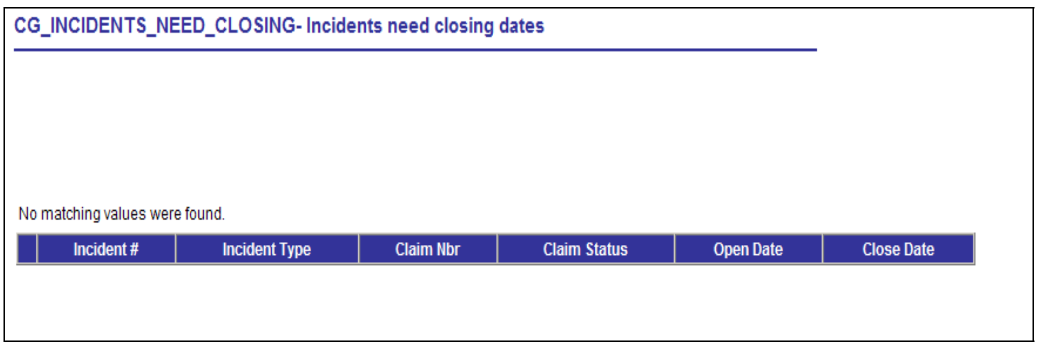
Use

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

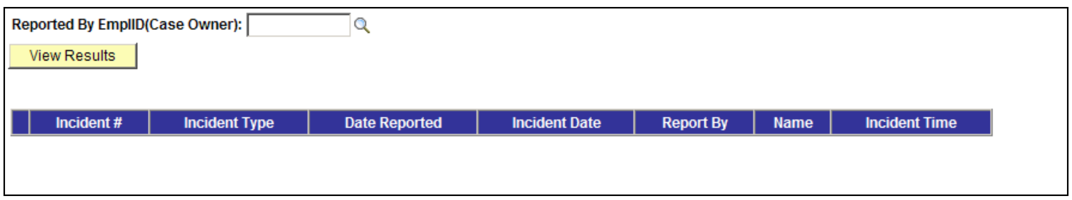
- Incident Details
- Injury
- Manage Case
- Correct Plan

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. Note: Worklife Exceptional Family Member Program (EFMP) or Program Manager (PM) users have access to run this report.
Case Owner Incidents Report	This query generates a list of Incidents for any given case owner you designate in the parameters. The system will prompt you for an EmplID of the case owner. The case owner is designated by the EmplID that is in the Reported By EmplID field in the Incident Details component on the Notifications page. Note: Worklife Exceptional Family Member Program (EFMP) or Program Manager (PM) users have access to run this report.
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. Note: Worklife Exceptional Family Member Program (EFMP) or Program Manager (PM) users have access to run this report.

Step	Action
	In the **Worklife Reports** pagelet click on the Incident Without Close Dates hyperlink:   The system will automatically run the report and the report output will pop up in a new window. 

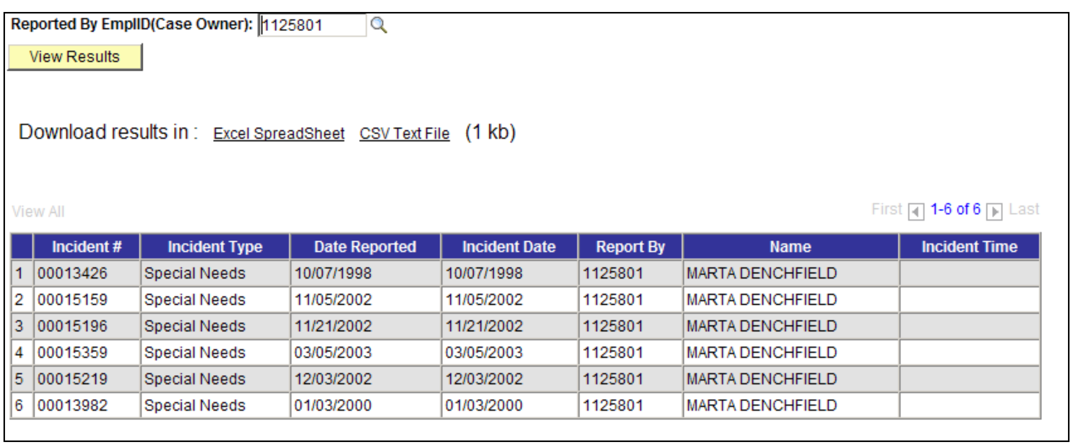
Step	Action
1	In the **Worklife Reports** pagelet click on the Case Owner Incident Report hyperlink:

A prompt will pop up in a new window.



- Enter the Reported By EmplID (Case Owner):
- Click View Results

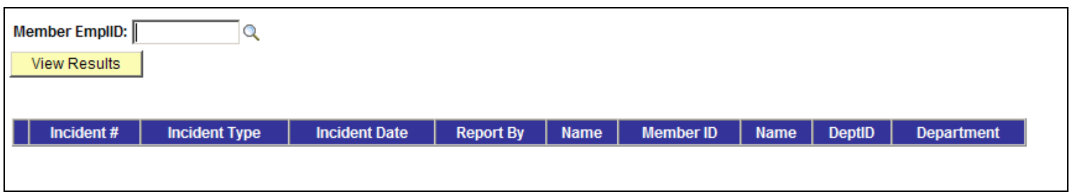
The report output will display in the following format



	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	

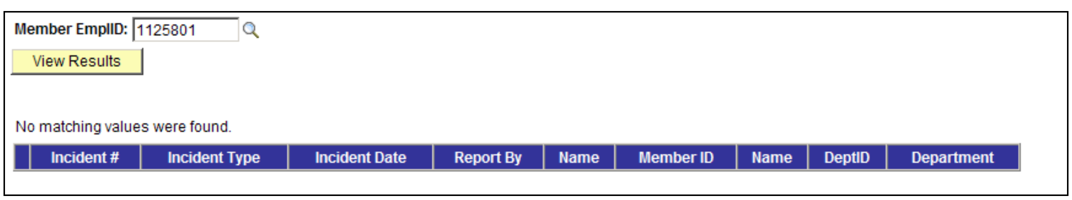
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
In the Worklife Reports pagelet click on the Case Owner Incident Report hyperlink:

A prompt will pop up in a new window.



- Enter the Member EmplID:
- Click View Results

The report output will display in the following format



</td></tr>
</table>