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

Employee Assistance Program
User Guide

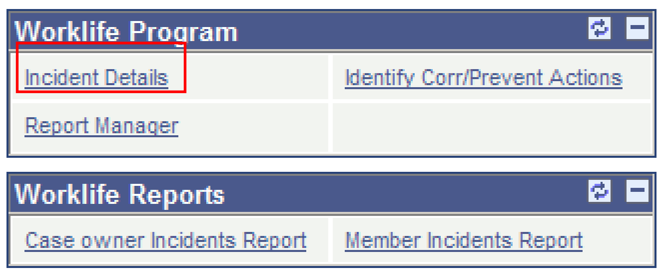
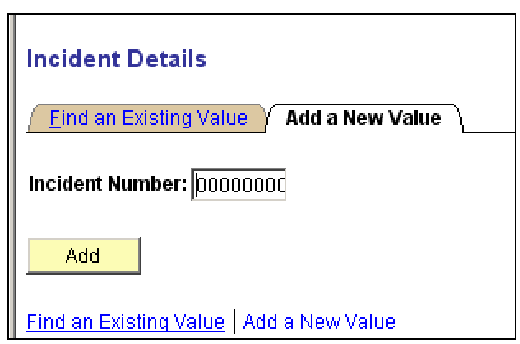
Table of Contents

How to Enter an Employee Assistance Incident

Use When a USCG member has a Vendor and/or a Provider complaint from an Employee Assistance referral, it is entered into the system as an incident. The user will take the following actions to add the incident details:

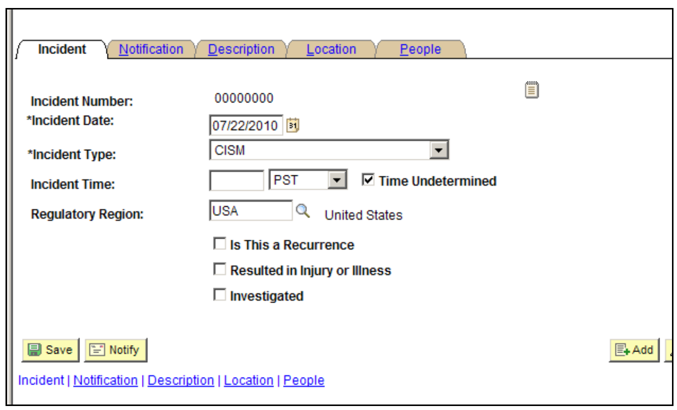
Pages

- Incident
- Notification
- Description

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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</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 Employee Assistance.
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: Leave blank. Please do NOT use this for Employee Assistance.
Investigated: Leave blank. Please do NOT use this for Employee Assistance.

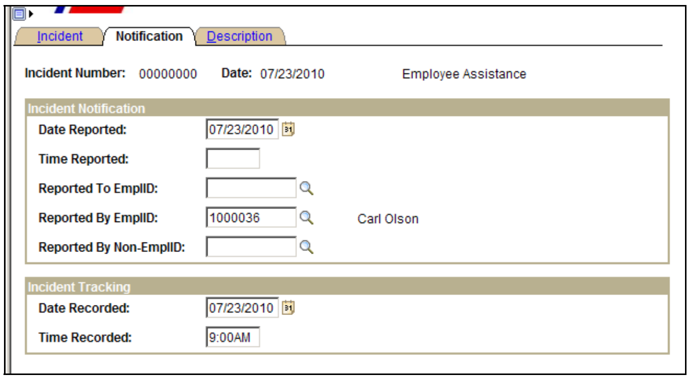


Click the Save button.
 Use the Notepad to enter any additional information on the incident. To access the Notepad, click the icon. Please refer to the instructions on “How to Use the Notepad.”

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

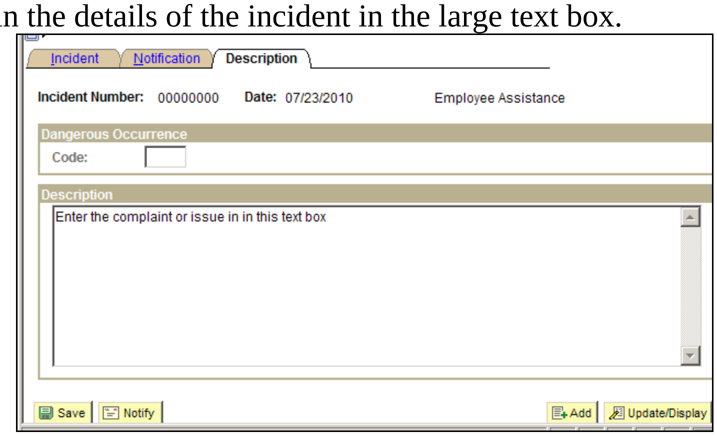
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
Select the Notification tab and enter the following data:

- **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:** Leave blank. Please do not use for EAP.
- **Reported By:** Choose the EmplID of the EAPC who is entering and managing the incident.
- **Reported By Non-EmplID:** Leave blank. Please do not use for EAP.
- **Date Recorded:** Default date (today’s date).
- **Time Recorded:** Enter as military time and upon save it will be formatted to regular time and AM/PM. If unknown, leave the field blank.



</td></tr>
<tr><td>4</td><td>
Select the Description tab

- Type in the details of the incident in the large text box.



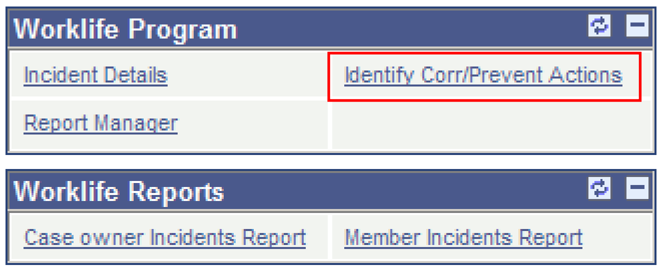
- Click the **Save** button.
</td></tr>
<tr><td></td><td>To proceed, click the Home hyperlink in the top right corner of to return to Portal, WorkLife Program pagelet to continue, or select the Sign Out hyperlink. It is helpful for later activities to write down the incident number.</td></tr>
</table>

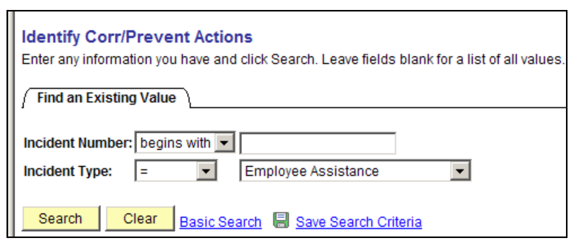
How to Add and Manage a Corrective Plan

Use The primary purpose of the **Corrective Plan** is to manage a complaint until it can be resolved and closed in the system.

Prerequisites
- Incident

Pages
- Corrective

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
In the WorkLife Program pagelet click on the Identify Corr/Prevent Actions hyperlink to create a Corrective Plan associated with the Incident.


Find the Incident Number to associate to the Corrective Plan.


If known, enter the incident number and click the Search button.
If not known, select Employee Assistance 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.

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

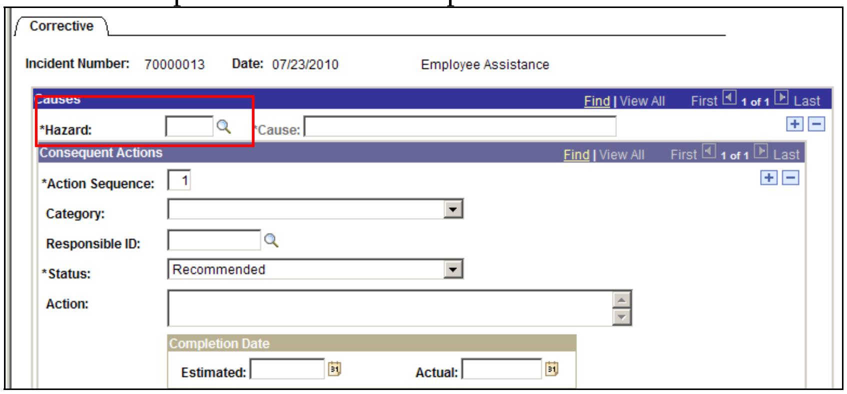
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>

On the **Corrective** page do the following:

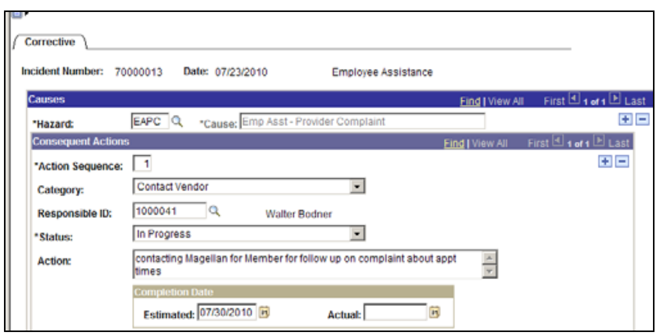
- Enter the Cause (**Hazard**) by clicking the magnifying glass, and select from the list of applicable options for ***Employee Assistance.***

The options are:

- **EAPC** – Emp Asst – Provider Complaint
- **EAVN** – Emp Asst - Vendor Complaint



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

Step	Action
3	On the Corrective page, select a **Category** by clicking on the down arrow and choose a **Cause.** The options for the ***Employee Assistance*** program are as follow: ➢ **Contact Vendor** ➢ **Facilitate Alternate Referral** ➢ **Identify Resources** ➢ **Provide Follow up** • Enter the **Responsible ID** by clicking on the magnifying glass to select the USCG Member EmplID responsible for the actions entered for each. This is an optional field. ***Note:*** If the person is someone other than a USCG member, type in the name and information into the **Action** text box. • Select the **Status** field to indicate the status of each Action Sequence. The options follow: ➢ **In Progress** ➢ **Completed** ➢ **Recommended** ➢ **Existing** ➢ **Planned** • In **Action** text box, type in the details of the plan. • Enter the **Completion Date** information by entering a date (MMDDYYYY) or selecting the calendar icon next to the **Estimated** and **Actual** fields. ***Note**:* The EAP incident will remain unresolved and “open” in the system until the **Status** has been set to **Completed**, and the **Actual Completion Date** has been entered.  • Click on the **Save** button when you have finished with the *Action Sequence 1*. • To add additional Consequent Actions, select the **[+]** in the right corner and follow the steps to add a Consequent Action.
	To proceed, click the **Home** hyperlink in the top right corner of to return to Portal, **WorkLife Program** pagelet to continue, or select the **Sign Out** hyperlink. It is helpful for later activities to write down the incident number.

How to Run a Worklife Report

Use

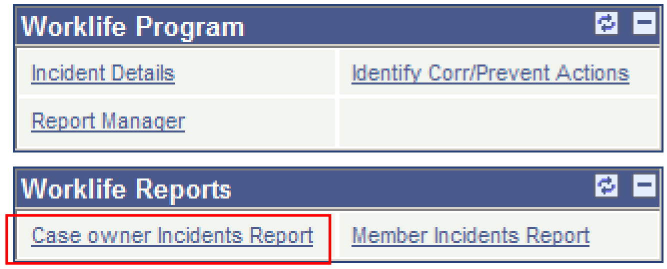
Worklife Report hyperlinks are housed in the Worklife Reports pagelet. Click on the hyperlink of the desired report to run and retrieve the output. Descriptions of the reports accessible to the Worklife Family Advocacy User are located below.

Prerequisites

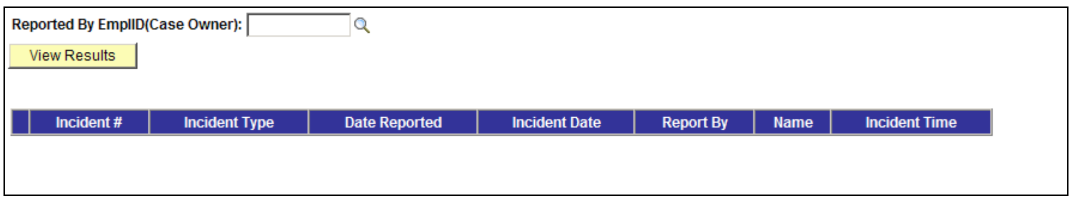
- Incident Details
- Correct Plan

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

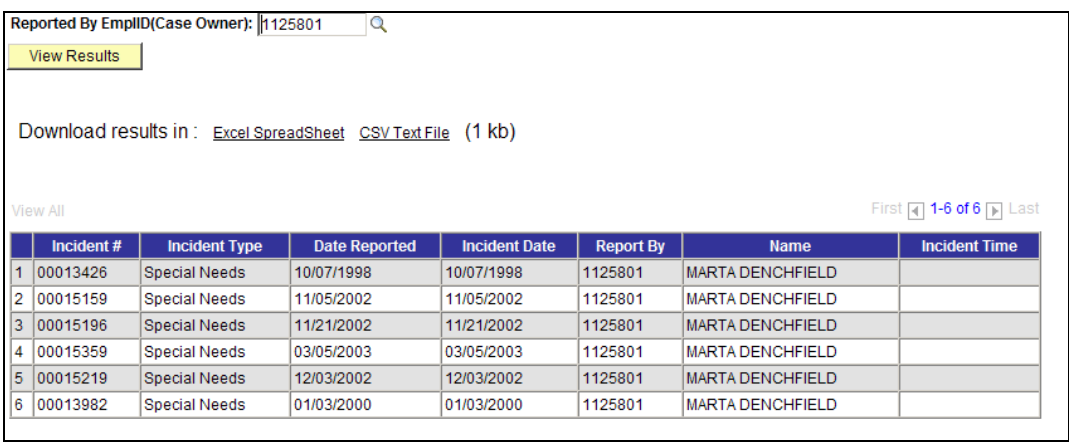


A prompt will pop up in a new window.



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

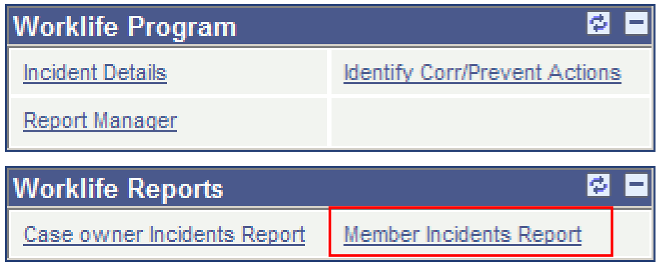
The report output will display in the following format



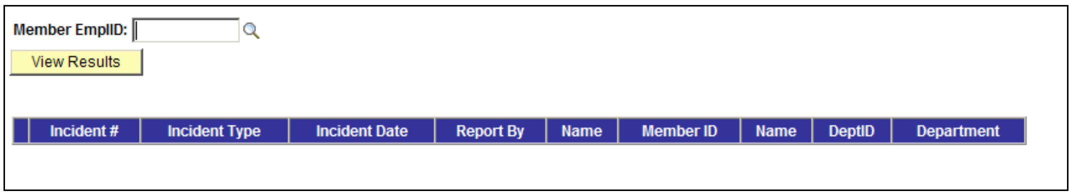
	Incident #	Incident Type	Date Reported	Incident Date	Report By	Name	Incident Time
1	00013426	Special Needs	10/07/1998	10/07/1998	1125801	MARTA DENCHFIELD	
2	00015159	Special Needs	11/05/2002	11/05/2002	1125801	MARTA DENCHFIELD	
3	00015196	Special Needs	11/21/2002	11/21/2002	1125801	MARTA DENCHFIELD	
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	

Step	Action

1 In the **Worklife Reports** pagelet click on the Member Incidents 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