

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

**Substance Abuse Program**  
**User Guide**

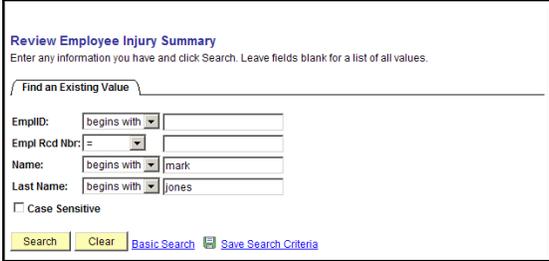
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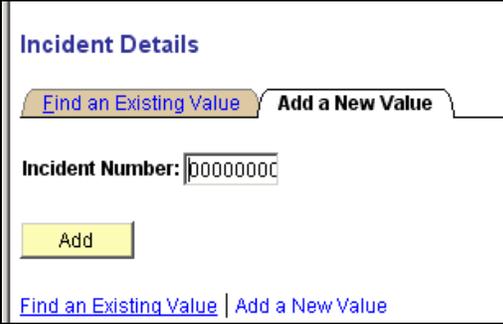
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## How to Enter a Substance Abuse Incident

**Use** When there is a Substance Abuse incident, the information is entered into the system. The user will take the following actions to add the Incident Details.

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

Step	Action
1	<p>Check to see if there are other Substance Abuse Incidents for a USCG Member to determine a recurrence (<b>Step 3</b>) by doing the following from the Portal :</p> <ul style="list-style-type: none"> <li>• Click on the Employee Incident Summary in the <b>Worklife Program</b> pagelet:</li> </ul> <div style="text-align: center; margin: 10px 0;">  </div> <ul style="list-style-type: none"> <li>• Enter person's Last Name (or if you have the EMPLID)</li> <li>• Select the <b>Search</b> button.</li> </ul> <div style="text-align: center; margin: 10px 0;">  </div> <p>Note: If there is another Substance Abuse Incident in the system involving the USCG Member you will use this information to check the box in <b>Step 3 - Is This a Recurrence</b>).</p> <ul style="list-style-type: none"> <li>• To proceed to the next step, click the Home hyperlink in the top right corner of the page to return to the Portal page.</li> </ul>

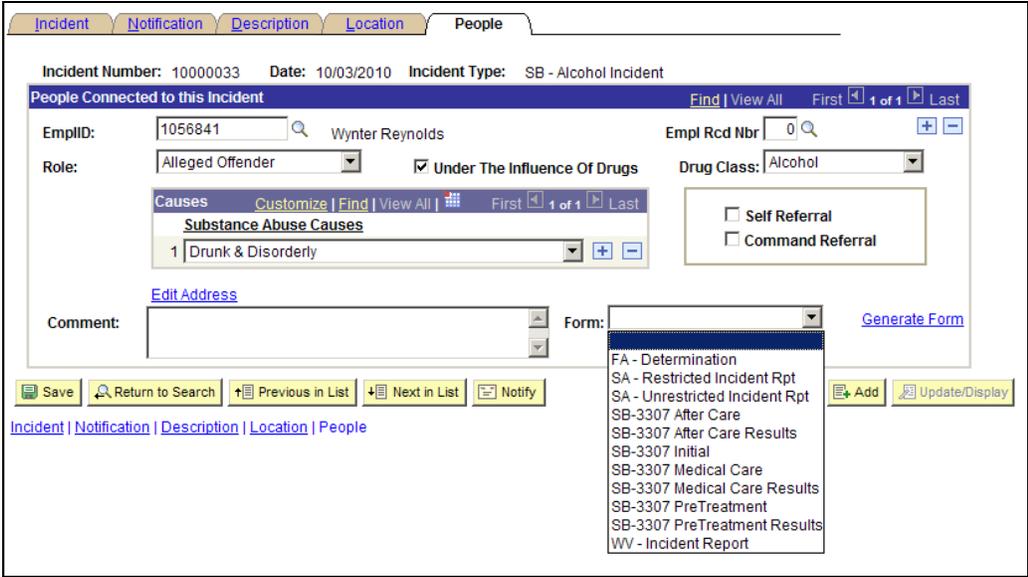
Step	Action
2	<p>To add a new incident, click on <b>Incident Details</b>:</p> <div data-bbox="462 233 1300 680" style="border: 1px solid black; padding: 5px;">  <p>The screenshot shows a 'Worklife Program' menu with several options. 'Incident Details' is highlighted with a red box. Other options include 'Manage Case', 'Employee Incident Summary', 'Report Manager', 'Incident/Injury - Member Setup', 'Create Employee Rehab Plan', and 'Add Action Request'. Below this is a 'Worklife Reports' menu with options like 'Incidents Without Close Dates', 'Case owner Incidents Report', and 'Member Incidents Report'.</p> </div> <ul style="list-style-type: none"> <li>• Select the <b>Add a New Value</b> tab.</li> </ul> <div data-bbox="630 793 1133 1117" style="border: 1px solid black; padding: 5px;">  <p>The screenshot shows the 'Incident Details' form. The 'Add a New Value' tab is selected. There is a text input field for 'Incident Number' containing '00000000'. Below the input field is a yellow 'Add' button. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.</p> </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
3	<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 one of these options: <ul style="list-style-type: none"> <li>➤ <b>SB – Alcohol Incident</b></li> <li>➤ <b>SB – Alcohol Situation</b></li> <li>➤ <b>SB – Drug Incident</b></li> </ul> </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> If applicable, check the box. Refer to Step 1 on Reviewing Employee Injury Summary.</li> <li>• <b>Investigated:</b> If applicable, check the box.</li> </ul> <div data-bbox="404 1010 1357 1526" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>The screenshot shows a web-based form for incident reporting. At the top, there are five tabs: Incident (selected), Notification, Description, Location, and People. The form fields are as follows:</p> <ul style="list-style-type: none"> <li><b>Incident Number:</b> 10000033</li> <li><b>*Incident Date:</b> 10/03/2010 (with a calendar icon)</li> <li><b>*Incident Type:</b> SB - Alcohol Incident (dropdown menu)</li> <li><b>Incident Time:</b> [empty] PST (dropdown menu) <input checked="" type="checkbox"/> Time Undetermined</li> <li><b>Regulatory Region:</b> USA (dropdown menu) United States</li> <li><input type="checkbox"/> Is This a Recurrence</li> <li><input checked="" type="checkbox"/> Resulted in Injury or Illness</li> <li><input type="checkbox"/> Investigated</li> </ul> </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
4	<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:</b> Click on the magnifying glass icon , and choose the CDAR entering and managing the incident.  <i>Note:</i> The CDAR entered into the <b>Reported By</b> field is the <b>ONLY</b> person other than the SAP and Program Manager who can access and view the incident.</li> </ul> <p><b>Reported By Non-EmplID:</b> Leave blank. Please do not use for Substance Abuse.</p> <ul style="list-style-type: none"> <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="370 978 1468 1524" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"> <span style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Incident</span> <span style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Notification</span> <span style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Description</span> <span style="border: 1px solid black; padding: 2px 5px; margin-right: 5px;">Location</span> <span style="border: 1px solid black; padding: 2px 5px;">People</span> </div> <p>Incident Number: 10000033      Date: 10/03/2010      SB - Alcohol Incident</p> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p><b>Incident Notification</b></p> <p>Date Reported: <input type="text" value="11/01/2010"/> </p> <p>Time Reported: <input type="text" value="12:00PM"/></p> <p>Reported To EmplID: <input type="text" value="1042766"/>  Sean Sullivan</p> <p>Reported By EmplID: <input type="text" value="1056841"/>  Wynter Reynolds</p> <p>Reported By Non-EmplID: <input type="text"/></p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p><b>Incident Tracking</b></p> <p>Date Recorded: <input type="text" value="11/15/2010"/> </p> <p>Time Recorded: <input type="text"/></p> </div> </div>

Step	Action
5	<p>Select the <b>Description</b> tab and type in the details of the incident in the large text box.</p> <div data-bbox="440 300 1382 705" style="border: 1px solid black; padding: 5px;"> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button when finished.</li> </ul> <p><b>Note:</b> Data typed into the Description box will appear on the <b>Initial 3307</b>, and should contain all the relevant information for an <b>Initial 3307</b>.</p>

Step	Action
6	<p>Select the <b>Location</b> tab and enter the following.</p> <ul style="list-style-type: none"> <li>• <b>Occurred on Premises:</b> Leave blank. Please do not use this for Substance Abuse.</li> <li>• <b>Location SetID:</b> Enter <b>00010</b></li> <li>• <b>Location:</b> Select the magnifying glass icon and select the location of the incident.</li> <li>• <b>Establishment ID:</b> Enter <b>USCG</b></li> <li>• <b>Exact Location:</b> This is an optional description. Enter if known.</li> </ul> <div data-bbox="472 573 1154 1003" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div>

Step	Action
7	<p>Select the <b>People</b> tab and add the USCG Member(s) to the system:</p> <ul style="list-style-type: none"> <li>• Select the <b>EmplID</b> by clicking on the magnifying glass icon  next to the field and select the member from the list presented.</li> <li>• Select the associated <b>Role</b> from the drop down list: <ul style="list-style-type: none"> <li>➤ <b>Member</b> <i>or</i></li> <li>➤ <b>Driver/Operator</b></li> </ul> </li> <li>• If it is known that the Member was <b>Under the Influence of Drugs</b>, check the box.</li> <li>• Select the <b>Drug Class</b> (<i>won't be available unless above was checked off</i>) from the drop down list: <ul style="list-style-type: none"> <li>➤ <b>Alcohol</b></li> <li>➤ <b>Drug ILL</b></li> <li>➤ <b>Drugs RX</b></li> </ul> </li> <li>• Select the checkbox if <b>“Self Referral”</b> <i>or</i> a <b>“Command Referral”</b></li> <li>• Select the <b>Cause</b> from the drop down list of options. To add more than one, click on the [+] for another row.</li> </ul> <div data-bbox="370 1050 1398 1627" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> <ul style="list-style-type: none"> <li>• Click on the <b>Save</b> button</li> </ul>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>Work Life 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 Associate an Injury with an Incident

**Use** The Member must be associated with the **Injury Details** to set the *Assignment Flag* and to create the *Rehab (Treatment) Plans*.

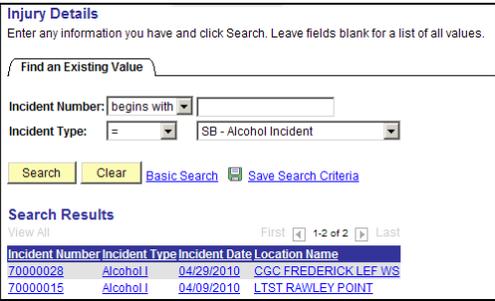
The user will take the following actions to associate the Member to the Injury Details:

**Prerequisites**

- Incident Number

**Pages**

- Injury
- Details

Step	Action
1	<p>From the Portal, Worklife Program pagelet do the following:</p> <ul style="list-style-type: none"> <li>• Click on <b>Incident/Injury – Member Setup</b></li> </ul>   <ul style="list-style-type: none"> <li>• Enter the Incident Number and/or select the Incident Type as one of the following for the Substance Abuse Program: <ul style="list-style-type: none"> <li>➤ <b>SB – Alcohol Incident</b></li> <li>➤ <b>SB – Alcohol Situation</b></li> <li>➤ <b>SB – Drug Incident</b></li> </ul> </li> </ul>  <ul style="list-style-type: none"> <li>• If known, enter the incident number and click the <b>Search</b> button.</li> <li>• If not known, select Substance Abuse for the <b>Incident Type</b>, leave the <b>Incident Number</b> 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.</li> </ul>

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Step	Action
2	<p>On the <b>Injury</b> Page, select the EmplID by doing the following:</p> <ul style="list-style-type: none"> <li>• <b>EmplID:</b> Click on the  magnifying glass and select the person from the list presented.</li> <li>• <b>Date Reported:</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.</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> </ul> <div data-bbox="526 598 1222 1003" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p>The screenshot shows the 'Injury' page with the 'Diagnoses' tab selected. The incident details are: Incident Number: 70000020, Date: 07/26/2010, SB - Alcohol Incident. The 'Person Involved' section shows EmplID: 1000030, Name: Kenneth Theriault, Date of Birth: 10/16/1938, Date of Death: (blank), Gender: Unknown. The 'Employee Data at Incident Date' section shows Business Unit: WARGC, Department: 002037, Job Code: 202597, Location: 000246. The 'Notification - This Person' section shows Date Reported: 07/26/2010, Time Reported: (blank) PST. At the bottom are buttons for Save, Return to Search, and Notify.</p> </div>

Step	Action
3	<p>Click on the <b>Diagnosis</b> tab and select the <b>Type of Health Care (providers)</b>:</p> <p><b>Type of Health Care</b> options are:</p> <ul style="list-style-type: none"> <li>• SB – Outpatient (1)</li> <li>• SB – Intensive (2)</li> <li>• SB – In Patient (3)</li> <li>• SB – Detox (4)</li> <li>• SB – Education/Basic (5)</li> <li>• SB – Education/Impact (6)</li> </ul> <p><b>Note:</b> Physician ID, Medical Facility and Phone field are <b>not</b> used in the system.</p> <p>Select the associated <b>Diagnosis</b> by clicking on the magnifying glass from the list of options:</p> <p><b>Diagnosis options:</b></p> <ul style="list-style-type: none"> <li>• Pending (Select this when they are in the “Prescreening” Phase.)</li> <li>• Drug Dependent</li> <li>• Alcohol Dependent</li> <li>• Alcohol Abusive</li> <li>• Drug Abusive</li> <li>• Deferred</li> </ul> <p>• Click the <b>Save</b> button when finished entering the data.</p>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>Work Life 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 the Case Status and set an Assignment Flag

**Use** The primary purpose of **Manage Case** is to:

- Set and remove an **Assignment Flag** on a USCG Member.
- Manage the **Status** of an incident:
  - Pending (Pre-Screening)
  - Approved (Treatment)
  - Denied (Refused)
  - Withdrawn (Failed)

*Note:* When a Member is a USCG member and has an approved Substance Abuse Case, the Assignment Officer is alerted to contact the Substance Abuse Program office.

- Prerequisites**
- Incident
  - Injury
- Pages**
- Claim Details

Step	Action
1	<p>In the <b>Worklife Program</b> pagelet click on the Manage Case hyperlink:</p>  <p>At the <b>Open Claim search</b> page, enter the <b>Incident #</b> (<i>refer to Incident Details</i>).</p>  <ul style="list-style-type: none"> <li>• Select the <b>Add a New Value</b> tab.</li> </ul>

Step	Action
2	<p>On the <b>Open Claim</b> page,</p> <div data-bbox="581 296 1154 585" 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>
3	<p>On the <b>Claims Details</b> page the <b>Date Opened</b> and <b>Status = Pending</b> are defaults in the system. Take the following steps to associate the incident with the member:</p> <ul style="list-style-type: none"> <li>• The <b>Person Filing</b> is the <i>USCG Member EmplID</i> that you will be setting the Assignment Flag on in the system.</li> <li>• Enter the <b>EmplID</b> into the field (do not use Non-EmplID), or use the magnifying glass icon to search and select the <b>EmplID</b> for the USCG member.</li> </ul> <div data-bbox="483 1142 1252 1556" data-label="Image"> </div> <p><b>Note: Pending (Pre-Screening)</b> – The system initially default to this status the first time. This status <i>does not</i> set the Assignment Flag.</p> <ul style="list-style-type: none"> <li>• Select the <b>Save</b> button</li> </ul>

Step	Action
3	<p><b><u>Set the Assignment Flag</u></b> on the USCG Member:</p> <ul style="list-style-type: none"> <li>• Change the <b>Status</b> from Pending to <b>Approved</b> by clicking on the radio button.</li> <li>• Click on the <b>Save</b> button</li> <li>• After the system completes “processing” a window will be displayed to confirm the Member Flag was set on the Member associated with the incident.</li> </ul> <div data-bbox="594 533 1149 737" data-label="Image"> </div> <ul style="list-style-type: none"> <li>• Click on the <b>OK</b> button</li> </ul> <p><b><u>Remove the Assignment Flag</u></b> on the USCG Member:</p> <ul style="list-style-type: none"> <li>• <i>Do not change</i> Status of Approved</li> <li>• Enter a <b>Closed Date</b> in MMDDYYYY format or select the calendar icon and select the date.</li> </ul> <div data-bbox="521 1073 1219 1493" data-label="Image"> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button.</li> </ul>

Step	Action
4	<p>After the system completes “processing” a window will be displayed to confirm that the Member Flag was <b>removed</b> on the Member associated with the incident as selected (Step 3).</p> <div data-bbox="620 342 1118 512" data-label="Image"> </div> <ul style="list-style-type: none"> <li>• Click on the <b>OK</b> button</li> </ul> <p>Take the following steps for the other applicable incident actions:</p> <p><u>Member has <b>Refused</b> Treatment:</u></p> <ul style="list-style-type: none"> <li>• Change the <b>Status</b> to <b>Denied</b> (<i>Refused</i>) by clicking on the radio button.</li> <li>• Click on the <b>Save</b> button</li> </ul> <p><u>Member has <b>Failed</b> Treatment:</u></p> <ul style="list-style-type: none"> <li>• Change the <b>Status</b> to <b>Withdrawn</b> (<i>Failed</i>) by clicking on the radio button.</li> <li>• Click on the <b>Save</b> button</li> </ul> <p><b>Note:</b> Do not enter a Closed Date (this will keep the Assignment Flag set in the system) or Remove the Assignment Flag (if applicable) by entering a Closed Date as above.</p>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>Work Life 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 Rehab Plan

**Use** The purpose of the Rehab Plan is to manage the treatment plans that are set forth for the member involved in the Substance Abuse Incident. There are three phases of treatment: Pre-Treatment, Treatment, and After Care.

- Prerequisites**
- Incident Details
  - Injury Details

- Pages**
- Actions

Step	Action
1	<p>In the <b>Worklife Program</b> pagelet click on the <b>Create Employee Rehab Plan</b> hyperlink:</p> <div data-bbox="631 753 1062 1031" data-label="Image"> <p>The screenshot shows a 'Worklife Program' pagelet with a grid of links. The link 'Create Employee Rehab Plan' is highlighted with a red rectangular box. Other visible links include 'Incident Details', 'Incident/Injury - Member Setup', 'Manage Case', 'Employee Incident Summary', 'Member Flag Details', 'Work-Life User Guides', 'Office of Work-Life', and 'Report Manager'. Below this is a 'Worklife Reports' pagelet with links for 'Incidents Without Close Dates' and 'Case owner Incidents Report'.</p> </div> <p>Enter the <b>EmplID</b> and/or the <b>Last Name</b> of the USCG Member associated with the Incident.</p> <div data-bbox="591 1129 1118 1480" data-label="Form"> <p>The screenshot shows the 'Create Employee Rehab Plan' search form. It includes a search bar with the text 'Find an Existing Value'. Below the search bar are four input fields: 'EmplID:' with a dropdown menu set to 'begins with' and a text box containing '1000030'; 'Empl Rcd Nbr:' with a dropdown menu set to '=' and an empty text box; 'Last Name:' with a dropdown menu set to 'begins with' and an empty text box; and 'First Name:' with a dropdown menu set to 'begins with' and an empty text box. At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.</p> </div> <ul style="list-style-type: none"> <li>• Click on the <b>Search</b> button.</li> </ul>

Step	Action
	<p>On the <b>Action</b> page Create the Rehabilitation Plan for the USCG Member by doing the following:</p> <p><i>Note:</i> Do not edit the <b>Action Sequence</b> field. It will update automatically in the order that the plans are entered. For additional plans, simply select the [+] and continue to add others.</p> <p style="text-align: center;"><b><u>Pre-Treatment Plan(s)</u></b></p> <ul style="list-style-type: none"> <li>• <b>Type:</b> Select the <b>SB – Pretreatment</b></li> <li>• <b>Responsible ID:</b> Select the <b>CDAR EmplID</b></li> <li>• <b>Provider Description:</b> Type in <b>CDAR</b></li> <li>• <b>Diagnosis:</b> Select <b>Pending</b></li> <li>• <b>Action Status:</b> Select appropriate one from list of options ( In Progress, Recommended, Completed, Planned or Existing)</li> <li>• <b>Estimated Completion Date:</b> Enter Date</li> <li>• <b>Actual Completion Date:</b> Enter date once the Action has been completed (be sure to update the Action Status to Completed too.)</li> <li>• <b>Corrective Action:</b> Type in the specific Pretreatment plan. <i>This will appear on the PreTreatment 3307 Form</i></li> </ul> <div data-bbox="464 993 1247 1528" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p style="text-align: center;">Actions</p> <p>EmplID: 1000030    Kenneth Theriault    Empl Rcd Nbr: 0</p> <p>Incident Number: 70000020    Incident Date: 07/26/2010    Incident Type: Alcohol I</p> <p style="background-color: #4a7ebb; color: white; padding: 2px;">Rehabilitation Plan    Find   View All    First 1 of 1 Last</p> <p>*Action Sequence: <input type="text" value="1"/>    Type: <input type="text" value="SB - Pretreatment"/>    [+]</p> <p>Responsible ID: <input type="text" value="1074051"/>    Dwane Simpson</p> <p>Physician: <input type="text"/></p> <p>Provider Description: <input type="text" value="CDAR"/></p> <p>Diagnosis: <input type="text" value="PND"/>    Pending</p> <p>*Action Status: <input type="text" value="In Progress"/>    Estimated Completion Date: <input type="text" value="07/30/2010"/>    [B]</p> <p style="text-align: right;">Actual Completion Date: <input type="text"/></p> <p>Corrective Action: <input type="text" value="Member will not use Alcohol, Attend 1 time per week and meet with the CDAR 2 times a week."/></p> <p style="font-size: small; text-align: left;">[ Save ]    [ Return to Search ]    [ Notify ]</p> </div> <ul style="list-style-type: none"> <li>• Select the <b>Save</b> button</li> </ul>

Step	Action
3	<p>On the <b>Action</b> page add the <b>Treatment Plan</b> by selecting the [+] in right corner of the <b>Rehabilitation Plan</b> and do the following:</p> <ul style="list-style-type: none"> <li>• <b>Select the Type as AB - Medical Care</b></li> <li><b>Responsible ID:</b> Select Member's <b>EmplID</b></li> <li><b>Provider Description:</b> Type the Facility name (<i>if known</i>)</li> <li><b>Diagnosis &lt;select one&gt;:</b> <ul style="list-style-type: none"> <li>• <b>Alcohol Abusive</b></li> <li>• <b>Alcohol Dependent</b></li> <li>• <b>Drug Abusive</b></li> <li>• <b>Drug Dependent</b></li> <li>• <b>Deferred Diagnosis</b></li> </ul> </li> <li>• <b>Action Status:</b> Select appropriate one from list of options (In Progress, Recommended, Completed, Planned or Existing).</li> <li>• <b>Estimated Completion Date:</b> Enter Date.</li> <li>• <b>Actual Completion Date:</b> Enter date once the Action has been completed (be sure to update the Action Status to Completed too).</li> <li>• <b>Corrective Action:</b> <i>This will appear on the Medical Care 3307 Form</i></li> </ul> <div data-bbox="558 936 1153 1352" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div> <ul style="list-style-type: none"> <li>• Select the <b>Save</b> button when finished entering the data.</li> </ul>

Step	Action
4	<p>On the <b>Action</b> page add the <b>After Care Plan</b> by selecting the [+] in right corner of the <b>Rehabilitation Plan</b> and do the following.</p> <p style="text-align: center;"><b><u>After Care Plan(s)</u></b></p> <p><b>Select the Type as: SB – After Care</b></p> <ul style="list-style-type: none"> <li>• <b>Responsible ID: CDAR EmplID</b></li> <li>• <b>Provider Description: CDAR</b></li> <li>• <b>Diagnosis &lt;select one&gt;:</b> This <i>must</i> be the same diagnosis as in the Treatment Plan.</li> <li>• <b>Action Status:</b> Select appropriate one from list of options (In Progress, Recommended, Completed, Planned or Existing).</li> <li>• <b>Estimated Completion Date:</b> Enter Date.</li> <li>• <b>Actual Completion Date:</b> Enter date once the Action has been completed (be sure to update the Action Status to Completed too).</li> <li>• <b>Corrective Action:</b> Enter details of After Care instructions. <i>This will appear on the After Care 3307 Form</i></li> </ul> <div data-bbox="483 873 1224 1390" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div> <ul style="list-style-type: none"> <li>• Select the <b>Save</b> button when finished entering the data.</li> </ul>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>Work Life 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>

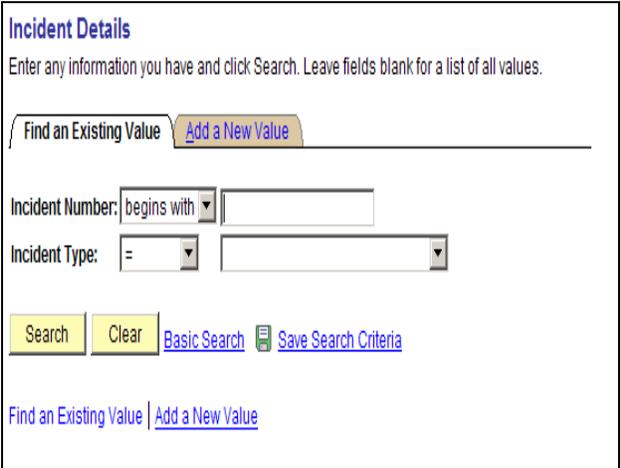
## How to Generate a Substance Abuse CG 3307 Form

### Use

The CG 3307 is the Performance and Discipline document (aka as the Page 7) that details the violation and section of the policy, rules & regulation violated, and terms of a correction plan. The CG 3307 is generated each time there is a new correction plan or action, and provided to the Command and member to review, and acknowledge by way of a signature. CG 3307 is permanently retained as part of the members personnel file. The CG 3307 is produced numerous times throughout the lifecycle of an incident, and captures all new data entered.

### Prerequisites

- Incident Details
- Injury
- Manage Case
- Correct Plan

Step	Action
1	<p>In the <b>Worklife Program</b> pagelet click on the <a href="#">Incident Details</a> hyperlink:</p>  <p>The screenshot shows two pagelets. The top one is titled 'Worklife Program' and contains several links: 'Incident Details' (highlighted with a red box), 'Incident/Injury - Member Setup', 'Manage Case', 'Create Employee Rehab Plan', 'Employee Incident Summary', 'Add Action Request', and 'Report Manager'. The bottom pagelet is titled 'Worklife Reports' and contains links for 'Incidents Without Close Dates', 'Case owner Incidents Report', and 'Member Incidents Report'.</p> <ul style="list-style-type: none"> <li>• Enter the Incident number you need to run the CG 3307 Form for.</li> </ul>  <p>The screenshot shows the 'Incident Details' search form. It includes a search bar with 'Find an Existing Value' and 'Add a New Value' buttons. Below the search bar are two dropdown menus: 'Incident Number: begins with' and 'Incident Type: ='. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.</p>

Incident Number: 10000028

\*Incident Date: 10/21/2010

\*Incident Type: SB - Alcohol Situation

Incident Time: 11:45PM PST  Time Undetermined

Regulatory Region: USA United States

Is This a Recurrence

Resulted in Injury or Illness

Investigated

- Select the People Page tab
- Use the dropdown to select Form SB – 3307 XXX

Incident Number: 10000028 Date: 10/21/2010 Incident Type: SB - Alcohol Situation

People Connected to this Incident

EmpID: 1260418 Eric Harrison Empl Rcd Nbr: 0

Role: Driver/Operator Of Vehicle  Under The Influence Of Drugs Drug Class: Alcohol

Causes: Substance Abuse Causes

1 | DUI/DWI

Self Referral  Command Referral

Comment:  Form:  [Generate Form](#)

Save Return to Search Notify

Incident | Notification | Description | Location | People

Form dropdown menu items:

- FA - Determination
- SA - Restricted Incident Rpt
- SA - Unrestricted Incident Rpt
- SB-3307 After Care
- SB-3307 After Care Results
- SB-3307 Initial
- SB-3307 Medical Care
- SB-3307 Medical Care Results
- SB-3307 PreTreatment
- SB-3307 PreTreatment Results
- WV - Incident Report

- Select Generate Form

The form will populate in a new window as a PDF

Note: See Appendix A for an example of the CG 3307 Form

## 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	<p>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.</p> <p>Note: Worklife Command Drug and Alcohol Representative (CDAR), Substance Abuse Prevention (SAP) or Program Manager (PM) users have access to run this report.</p>
Case Owner Incidents Report	<p>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.</p> <p>Note: Worklife Command Drug and Alcohol Representative (CDAR), Substance Abuse Prevention (SAP) or Program Manager (PM) users have access to run this report.</p>
Member Incidents Report	<p>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.</p> <p>Note: Worklife Command Drug and Alcohol Representative (CDAR), Substance Abuse Prevention (SAP) or Program Manager (PM) users have access to run this report.</p>

Step	Action												
	<p>In the <b>Worklife Reports</b> pagelet click on the <a href="#">Incident Without Close Dates</a> hyperlink:</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Worklife Program</b></p> <p><a href="#">Incident Details</a>                      <a href="#">Incident/Injury - Member Setup</a></p> <p><a href="#">Manage Case</a>                              <a href="#">Add/Modify Non-Employee</a></p> <p><a href="#">Employee Incident Summary</a>              <a href="#">Add Action Request</a></p> <p><a href="#">Report Manager</a></p> </div> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Worklife Reports</b></p> <p><a href="#">Incidents Without Close Dates</a>              <a href="#">Case owner Incidents Report</a></p> <p><a href="#">Member Incidents Report</a></p> </div> <p>The system will automatically run the report and the report output will pop up in a new window.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p><b>CG_INCIDENTS_NEED_CLOSING- Incidents need closing dates</b></p> <hr/> <p>No matching values were found.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Incident #</th> <th style="width: 20%;">Incident Type</th> <th style="width: 15%;">Claim Nbr</th> <th style="width: 15%;">Claim Status</th> <th style="width: 15%;">Open Date</th> <th style="width: 20%;">Close Date</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> </div>	Incident #	Incident Type	Claim Nbr	Claim Status	Open Date	Close Date						
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