

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

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**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

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**REFERENCES:**

1. 2008 National Defense Authorization Act, (H.R. 4986-445, SEC. 1616): *“Establishment of a Wounded Warrior Resource Center; Pg. 449-450*

**PURPOSE:** The Wounded Warrior (WW) specialty consultant’s primary role is to assess and determine what resources will best address the SM/FM or caregiver’s identified needs and to facilitate the process to connect the SM/FM, or caregiver to the identified resource.

**POLICY:** Wounded Warrior Case Action Process Phase Policy

**PROCEDURE:**

1. A statement of confidentiality shall be verbally read and the statement of understanding about WW consultations will be explained at the time of contact and documented in the case notes.
  - a. Exceptions to this are related to communication by e-mail only, and then the WW consultant will send an electronic version of the confidentiality statement and statement of understanding and will request a reply receipt. Documentation of all electronic communication shall be included in the case notes.
2. The service member’s military status shall be determined.
3. The WW consultant shall make a determination of the presenting problem.
4. The WW consultant shall make a determination of the necessary resources needed to best address the service member’s issue.
  - a. Examples of resources may include, but are not limited to: Military Treatment Facility (MTF), Veteran Affairs Health or Benefits, Service Branch’s Wounded Warrior Programs Point of Contacts, Guard and Reserves, CBOs, NGOs, MOS Related issue
  - b. When appropriate, a three-way call shall be offered as an option for a warm hand-off or when requested by caller.
  - c. If the contact for the resources is not available, with the permission of the caller, the WW consultant leaves both the caller’s and his/her contact information.
  - d. WW consultant documents all contact information related to the resources appropriate for the case in the WW Tracking System.
5. If the call from the SM/FM or caregiver is for information only, the WW consultant shall:

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

---

**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

---

- a. take the request and document it in the WW Tracking System;
  - b. provide the information requested or if necessary sends the request to a Researcher to complete and;
  - c. call or email the person back with the information once that research is completed.
6. All case notes shall be documented according to the Case Note Documentation Policy within the WW Tracking System.

**POLICY:** Wounded Warrior Case Entry Phase Policy

**PROCEDURE:** Calls are received by the WW consultant(s) in various ways.

1. MOS Triage or MOS consultant will provide a warm transfer of caller to an available WW consultant after the nature of the caller's issue is determined and a MOS case number is assigned for cross reference. MOS case number is assigned for cross reference and the case is resolved.
2. The WW Message Log is utilized when a WW consultant is not available for the warm transfer.
  - a. All calls documented in the Message Log will include the following:
    - i. Caller's contact information i.e. phone number, e-mail
    - ii. The best time to complete a return call
    - iii. A synopsis of presenting issue
    - iv. MOS case number
3. The WW Mail Box is utilized to meet the criteria of the Defense Authorization Act 2008 as an alternative means for SM/FM, or primary caregiver to obtain services when a WW consultant is not available.
  - a. All emails are reviewed for appropriateness
  - b. Those determined appropriate are assigned to a WW consultant to address
  - c. Those determined inappropriate are sent to Spam Report and deleted
4. External Sources
  - a. A direct call from a SM/FM or primary caregiver
  - b. A partner agency; at which time the WW consultant will advise the partner agency to have the SM/FM, or primary care giver to contact a WW consultant via the MOS toll-free number or the WW mail box.

**POLICY:** Wounded Warrior Case Follow-Up Services within 96 hour Timeframe

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

---

**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

---

**PROCEDURE:** The Wounded Warrior consultant will make a follow-up call to the SM/FM or caregiver within two (2) business days to determine if the issue(s) raised has been addressed by the resource(s) to which the WW consultant referred him/her or if an additional referral(s) is needed:

- a) If the issue(s) has been addressed, the WW consultant will contact the resource who addressed the issue and will request and obtain the “Action/Remediation Plan” Form that was sent to the original referral resource and once received will document it into the case notes and continue follow-up as needed;
  - b) If no action plan has been implemented, a follow-up call with the SM/FM or caregiver is scheduled for the next business day;
  - c) If the referral resource has not responded back to the SM/FM or caregiver, the WW consultant places a call to the referral resource to get a status update as well as to remind the resource that a plan has to be in place to address the issue(s) and implemented within 96 hours after receiving the initial call.
  - d) If additional resource(s) is needed (such as a referral to MOS), the WW consultant will make a warm handoff to the appropriate resource (MOS consultant);
  - e) Reports back to the SM/FM or caregiver if requested; and
  - f) Makes appropriate case notes in the Office of Secretary of Defense (OSD) WW Tracking System.
  - g) Once the Action Plan is completed and the issue is resolved, then the case is placed in a resolved status.
- 2) When 1(b) or 1(c) has occurred, the WW consultant will place a second follow-up call to SM/FM or caregiver as scheduled for the next business day or 72 business hours, after the time of the initial call to determine if the issue(s) has been addressed. If the issue has been addressed refer to 1 (a):
- a) If the referral resource has not responded back to the SM/FM or caregiver, the WW consultant places another call to the resource to get a status update as well as to again remind the resource that a plan has to be in place to address the issue(s) and implemented within 96 hours after receiving the initial call;
  - b) Alerts the WW Program Manager of the situation in a confidential email and documents in the case notes.
- 3) When 1(b) or 1(c) has occurred, the WW consultant will place a third follow-up call to SM/FM or caregiver as scheduled for the next business day or 84 business hours after the time of the initial call to determine if the issue(s) has been addressed. If the issue has been addressed refer to 1 (a):

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

---

**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

---

- a) If the referral resource has not responded back to the SM/FM or caregiver, the WW consultant places another call to the resource to get a status update as well as to again remind the resource that a plan has to be in place to address the issue(s) and implemented within 96 hours after receiving the initial call; and;
  - b) Provide a status update to the WW Program Manager who will notify OSD POC of the situation in a confidential email and documents in the case notes.
- 4) When 1(b) or 1(c) has occurred, the WW consultant will place a fourth follow-up call to SM/FM or caregiver as scheduled for the next business day or 96 business hours after the call has been referred to the resource to determine if the issue(s) has been addressed. If the issue has been addressed refer to 1 (a):
- a) If the referral resource has not responded back to the SM/FM or caregiver, the WW consultant places another call to the resource to get a status update as well as to again remind the resource that a plan has to be in place to address the issue(s) and implemented within 96 hours after receiving the initial call; and;
  - b) If the issue is being addressed but not completed, another follow-up call with the SM/FM or caregiver is scheduled for one month later and will repeat every month until issue(s) is addressed;
  - c) If the issue is not being addressed, the WW consultant will inform the WW Program Manager and follow the OSD direction for continued involvement in the case.
  - d) The WW consultant will continue to provide monthly follow-ups to the SM/FM or caregiver until further directed by OSD WW POC.
  - e) Provide a status update to the WW Program Manager of the situation in a confidential email and documents in the case notes.

**B. Follow-Up Procedure for Exceptions to the 96 hour Timeframe**

- 1) The Wounded Warrior consultant will make a follow-up call to the SM/FM or caregiver with discretion to determine if the issue(s) has been addressed.
  - a) If the issue has been resolved, the case will be placed in resolved status,
  - b) If the issue has not been addressed, the WW will determine if additional support by WW consultant will be required and make appropriate referrals if needed.
  - c) Using discretion, a minimum of one (1) to two (2) additional follow-up calls will be completed and documented in the case notes.

If issues continue to be identified, a case consultation will be required with a supervisor and documented in the case notes.

**POLICY: Wounded Warrior Case Note Documentation**

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

---

**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

---

**PROCEDURE:**

1. Only WW Staff will have access to OSD's Wounded Warrior Tracking System (WWTS).
2. All contact with Service Members/Family Members (SM/FM) will be documented in the OSD WWTS.
3. The OSD WWTS template will not be modified or altered in anyway by any staff member without management approval.
4. Ad hoc reports will not be created nor saved into case records without management approval.
5. The following data will be collected in OSD WWTS:
  - a. Time of call
  - b. Demographics (name of caller, SM/FM, phone number, e-mail and mailing address);
  - c. Nature of deficiency (health, facility, benefit);
  - d. Where referred (Service, VA, HA, MPP);
  - e. Non-deficient issues (child care, counseling, etc.)
  - f. The outcome (substantiated or unsubstantiated with no action plan required/case closed)
  - g. Follow-up actions taken
6. Case Notes: Case Notes will be maintained to ensure an accurate portrayal of facts, statements, and pertinent information pertaining to the SM/FM's case are documented. Case Notes will be clear and concise and include actions taken to address the SM/FM's need. Key sections and content where notes are documented:
  - a. Deficiencies in Services
    - i. Use the Comments/Notes section to document the identified problem related to the specific complaint(s) and/or deficiency.
    - ii. Document all prior attempts utilized to resolve the issue; and the individual(s) and organization(s) contacted.
    - iii. Use the Outcome section to document the identified outcome and the SM/FM satisfaction with the outcome.
  - b. General Comments/Notes
    - i. When applicable, include length of time in service/discharge date and status.
    - ii. When identifying other "non complaint or deficiency" items, be concise and clear about the resources the SM/FM are referred to, including phone number and Point of Contact (POC).
    - iii. Document all contacts with the SM/FM, POCs, and related personnel.
    - iv. Document all contacts name, title (if applicable) and their phone number for future reference and follow up.

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

---

**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

---

- v. Document all updates, follow ups, attempts to complete follow ups, and other related information.
- c. Documents Section
  - i. Upload all pertinent documents, e-mails or other relevant information to the case noted in a WORD document.
- d. Entering Case Notes
  - i. Case Notes will be entered upon conclusion of the documented event within the same work day.
  - ii. Case Notes not entered in “real-time” will be noted as a LATE ENTRY with the date/time the action originally occurred.
  - iii. EXCEPTIONS: If unable to enter Case Note due to technological difficulties, WW staff will document participant information on paper intake and make case entry the next business day. If the WW consultant is not scheduled to work the next business day, the case information will be submitted to the Service Deliver Manager (SDM) or designee for case entry.
  - iv. Case Notes will be legible and stated in a brief narrative form, using direct quotes as appropriate.
  - v. All slang and colloquial jargon will be avoided
  - vi. Authorized abbreviations may be used
  - vii. Case Notes must be grammatically correct, with correct spelling, punctuation and capitalization
  - viii. Case Notes cannot be altered once entered into the electronic record.
    - a) However, consultants may add an addendum to participant records.
    - b) Consultants may add an addendum specific to their own assessment, notes, or observations of the SM/FM.
- e. Use of Case Notes
  - i. Case Notes are used as a means of internal staff communication ONLY for the following purposes: Service Level, Quality Assurance, Resources, and Specific case related matters
  - ii. Inappropriate internal dialogue will not be included in case notes
  - iii. Electronic correspondence that is not relevant to the case and includes non-case related contents are NOT to be copied or pasted in case notes (i.e. e-mail exchanges between management addressing business or service-related matters)
  - iv. Case notes may include copied and pasted electronic correspondence relevant to the case (i.e. e-mail-a-consultant contacts to and from SM/FM’s; e-mail follow-up efforts to and from SM/FM’s and completed action/remediation plans).

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

---

**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

---

7. Confidentiality
  - a. Document in Case Notes that the confidentiality statement was read and acknowledged by noting it as such: CONFIDENTIALITY STATEMENT READ AND ACKNOWLEDGED.
  - b. Staff accessing confidential information from remote locations must ensure the information is only accessible to authorized WW staff.
  - c. In accordance with HIPAA regulations, documentation of chronic health conditions such as HIV shall be included in the appropriate section of the Case Notes only when the condition is relevant to the presenting issue and has a current impact on the issue.
  - d. Case Notes are a part of confidential case records and shall be handled accordingly. The confidentiality of case notes is covered by the Office of Secretary of Defense approved “Wounded Warrior Specialty Consultation Confidentiality –Service Member/Family Member Specific Information policy and Procedure.”
  - e. Case Notes shall be written only within the confines of identified confidential areas and should contain only that information which is necessary for properly serving the SM/FM.
  - f. Consultants accessing confidential information from remote locations must ensure the information is only accessible to authorized WW staff.

**POLICY:** Transfers of Veteran Callers to a MOS Triage Consultant

**PROCEDURE:**

1. The WW Consultant will assess the callers concerns and document in the WWRC Tracking System.
2. The WW Consultant will make appropriate referrals for mental health services to Veterans Affairs (VA) or other Military Service Programs for a Plan of Action for Resolution within 96 hours.
3. The WW Consultant will document the Case Management System case number from MOS in the WW tracking system.
4. WW Consultants will transfer the Veteran to a MOS Triage Consultant for evaluation of suitability for Non Medical Counseling sessions as a temporary solution while deficiencies in care are addressed.

**Military OneSource Program  
Policies and Procedures  
Attachment 33**

---

**SUBJECT: Wounded Warrior Specialty Consultations    Effective Date:    02/14/2012**

---

Once the Veteran is transferred to an MOS Triage Consultant, MOS will make the final determination of whether or not to offer veteran Non Medical Counseling.

5. When an MOS Triage Consultant determines that the veteran's case is not appropriate for Non Medical Counseling, they will inform the WW Consultant to continue searching for other possible treatment resources.

When Non Medical Counseling is authorized, WW Consultant will continue to document deficiency progress in WW Tracking System until a final resolution is obtained.

**EXCEPTIONS:**            There are no exceptions to this policy without Government MOS Program Office written approval.