Retention Management System Extension User Guide

Version 10.40.0

Privacy Act Statement

This is documentation for a Department of Defense web site. The security accreditation level of the site is classified as FOUO and below. Do not process, store, or transmit information classified above the accreditation level of the system. DOD web sites may be monitored for all lawful purposes, including to ensure their use is authorized, for management of the system, to facilitate protection against unauthorized access, and to verify security procedures, survivability, and operational security. Monitoring includes, but is not limited to, active attacks by authorized DOD entities to test or verify the security of this system. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All information, including personal information, placed on or sent over this system may be monitored. Use of this DOD web site, authorized or unauthorized, constitutes consent to monitoring. Unauthorized use of the DOD web site may subject you to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal, or other adverse action. Use of this system constitutes consent to monitoring for all lawful purposes.

Table of Contents

1 What's New **12**

2 SMMS Overview **49**

2.1 Accessing Retention Management System Extension 49

2.2 Logging on to SMMS 49

2.3 The StrengthNet Landing Page 50

2.3.1 Message Notification 51

2.3.1.1 Profile Settings 52

2.3.1.2 Help Desk 52

2.3.1.3 Manage Menu 52

2.4 Requesting Access on StrengthNet 56

2.4.1 Finding Access Request Form 59

3 Retention Management Software Overview **60**

3.1 Opening RMS Modules 60

3.2 Introduction to the RMS User Guide Interface 60

3.2.1 Command Center 63

3.2.1.1 Management Center 63

3.2.2 Soldier Roster 67

3.2.2.1 Soldier Roster Tools 68

3.2.3 Soldier Details 69

3.2.3.1 Vulcan Case Tabs 71

3.2.3.2 Viewing and Adding Contact History 72

3.2.3.3 Soldier Remarks (Vulcan Cases Only) 73

3.2.3.4 Programs and Awards (Vulcan Cases Only) 73

3.2.3.5 Soldier Status (Vulcan Cases Only) 74

3.2.3.6 Disposition (Vulcan Cases Only) 78

3.2.3.7 Phase Input (Vulcan Cases Only) 79

3.2.4 Case Details 79

4 RMS Modules **81**

5 Interstate Transfer Module **82**
5.1 Create a new Interstate Transfer 83
5.2 Access An Existing Case 85
5.3 Initiate Interstate Transfer 86
5.4 Complete Losing Unit Checklist 87
5.5 Complete Losing State Checklist 88
5.6 Assign Paragraph/Line 90
5.6.1 To assign a vacancy 90
5.6.2 To request split training 91
5.7 Complete Gaining State Checklist 92
5.8 Verify Case 93
5.8.1 Reopen a Case 95
5.8.2 Reset a Case 95
5.9 Follow Up 96
6 Sponsorship **97**
6.1 Initiate a Sponsorship Case 97
6.2 Contact a Sponsor 99
6.3 Contact a Soldier 101
6.4 Manage Checklist 102
6.4.1 View Sponsorship Guidelines 103
6.4.2 Reassign a Sponsor 103
6.5 Sponsor Survey 104
6.6 Awaiting Signoff 105
7 Extension **106**
7.1 Processing an Extension 106
7.2 Transferring a Case 118
8 Vulcan RSP **121**
8.1 RSP Warrior Sponsorship 121
8.1.1 Awaiting Attachment to RSP 121
8.1.2 Pending RSP Acknowledgment 123

8.1.3 Sponsorship Tasks Incomplete 125
8.1.4 Sponsorship Tasks Overdue 128
8.1.5 Quick Shipper 128
8.2 RSP Routine Monitoring 132
8.2.1 Physical Assessment 134
8.2.1.1 ACFT Assessment 134
8.2.1.2 OPAT Assessment 136
8.2.1.3 Height & Weight Screening 138
8.2.2 STRM Course Completion 142
8.2.2.1 STRM Course Completion Phases 143
8.2.3 Ship Date Management 144
8.2.4 Tattoo Screening 145
8.2.5 Personal Data Verified 146
8.2.6 HS Grade/GED Verified 146
8.2.7 Pre-Ship Counseling 147
8.2.8 Stripes for Skills 148
8.2.9 Stripes for Buddies 148
8.2.10 BAH Capture 149
8.3 Shipper Management 151
8.4 LNO Module 154
8.4.1 Create an LNO Ticket 154
8.4.2 View and Respond to New LNO Tickets 159
8.4.3 Respond to LNO Tickets Returned to LNO 162
8.4.3.1 Return to State 164
8.4.3.2 Close Case 165
8.4.3.3 Terminate Case 166
8.4.4 Respond to LNO Tickets Returned to State 166
8.4.5 LNO ticket buttons 170
9 Transition Services Module 171
9.1 Create a Transition Services Case 171

9.2 Access an Existing Case 174
9.2.1 Terminate a Case 175
9.3 Initial Phase 175
9.4 Upload Budget 177
9.5 Service Phase 178
9.6 Budget Review 180
9.7 Transition Phase 181
9.8 Transition Counselor Signoff 182
9.9 Commander Signoff 183
9.9.1 Return a Case to Transition Phase 184
9.10 Completed Cases 184
10 Additional Actions 186
10.1 Documents 186
10.1.1 Download a File 186
10.1.2 Upload a File 187
10.2 Case History 187
10.3 Extension Additional Actions 188
10.3.1 Counseling 188
10.3.2 Incentive Contracts 190
10.3.3 Intent History 190
10.3.3.1 Filtering 190
10.4 IST Additional Actions 190
10.4.1 Risk Factors 191
10.4.1.1 Risk Notes 191
10.4.1.2 Risk Levels 192
10.4.2 Forms 193
10.5 Transition Services Additional Actions 193
10.5.1 Budget/Documents 194
10.5.1.1 Download a File 194
10.5.1.2 Upload a Single File 194

10.5.2 Action History 195
10.6 Comments 195
10.7 Sponsorship Additional Actions 195
10.7.1 Case Remarks 195
10.7.2 Sponsor Contact 196
11 Contacting the Help Desk 198
12 Glossary of Icons 199
13 Additional Tools 200
13.1 Search 200
13.1.1 Soldier Search 200
13.1.2 Vulcan Soldier Search 203
13.1.3 Vulcan Ticket Search–LNO 205
13.1.4 Save a Search 207
13.1.5 View Saved Searches 207
13.1.6 Recent Searches 208
13.2 Reports 208
13.2.1 The Reports Screen 210
13.2.2 Data Marts 210
13.2.3 Report Information 210
13.2.3.1 Measurements 210
13.2.3.2 Dimensions 210
13.2.4 Applied Filters 211
13.2.4.1 Editing a Filter 211
13.2.4.2 Deleting a Filter 211
13.2.5 Report Tools 212
13.2.5.1 Report Builder 213
13.2.5.2 Sort the Report 216
13.2.5.3 Save the Report 216
13.2.5.4 Subscriptions in RMS User Guide 217
13.2.6 Drilling Down 217

13.2.7 Aggregate and Base Reports 218
13.2.8 Reports Glossary 219
13.3 Extension Reports 220
13.3.1 Sponsorship Status by Unit State 220
13.3.2 Sponsor Survey Results 221
13.3.3 Completed Extensions by State (YTD) 221
13.3.4 Contact Information for Open Cases 221
13.3.5 15 Months to ETS 222
13.3.6 Extension Status by Unit State (YTD) 223
13.3.7 Extensions in Progress 224
13.3.8 Counseling by Date Range 225
13.3.9 Not Counseled 226
13.3.10 Projected Losses 227
13.3.11 Reenlistment Success Rate from DPRO 227
13.3.12 Reason for ETS 227
13.3.13 Missed Counseling 228
13.3.14 Years Extended 228
13.3.15 Address Labels 228
13.3.16 Transfers by Unit State 229
13.3.17 Transfers Received by Unit State 229
13.3.18 Days in work bucket by case 230
13.3.19 Soldier Ship Roster 230
13.3.20 Soldier Roster 231
13.3.21 Disposition Roster 231
13.3.22 RSP Attachment Discrepancy 232
13.3.23 ATTRS Training Roster 233
13.3.24 Warrior Contact Roster 234
13.3.25 Warrior Roster Builder 235
13.4 My Reports 236
13.4.1 My Reports Folder 237

13.4.2 Private Reports 238
13.4.3 Shared Reports 239
13.5 Resource Center 240
13.6 Document Center 241
13.7 Administration 241
13.7.1 IST Unit Information 242
13.7.2 RCT Roster 246
13.7.3 Counseling Management 249
13.7.4 IST Notifications (Opt In) 251
13.7.5 Create Extensions Counseling 253
13.7.6 Category Manager 255
13.7.6.1 Add A Category 256
13.7.6.2 Edit A Category 257
13.7.6.3 Deactivate A Category 257
13.7.7 LNO Edit Ticket Options 257
13.7.7.1 Add an LNO User 258
13.7.7.2 Edit an LNO User 259
13.7.8 Resolution 259
13.7.8.1 Add A Resolution 260
13.7.8.2 Edit A Resolution 260
13.7.9 RSP Site Setup 261
13.7.9.1 Add an RSP Site 262
13.7.9.2 Edit an RSP Site 263
13.7.9.3 Add a Drill Date 264
13.7.9.4 Edit a Drill Date 264
13.7.9.5 Delete a Drill Date 264
13.8 Assume Command 265
13.8.1 Original Role 265
13.8.2 Change Role 266
13.9 RSP Portal 268

13.9.1 Training Sections 268
13.9.2 Module 270
13.9.3 Page Resources 271
13.10 User Management Tool 271
13.11 Accessing UMT 271
13.12 UMT Overview 272
13.13 Understanding the Case Management Framework 273
13.13.1 Understanding Work Buckets 274
13.13.2 Understanding Actions 275
13.13.2.1 Mapping Manual Actions to Begin-State Work Buckets 276
13.13.2.2 Mapping Manual Action Transitions to End-State Work Buckets 278
13.13.2.3 Time-Based State Transitions 278
13.14 Navigating the UMT Panels 279
13.14.1 Panel 1: The Command Center 279
13.14.1.1 UMT Searches 279
13.14.2 Panel 2: Landing Page and Results Display 280
13.14.3 Panel 3: User Management Functions 282
13.14.4 Controlling User Roles and Permissions in Panel 3 283
13.14.4.1 Profile 284
13.14.4.2 Command 285
13.14.4.3 Roles and Permissions 286
13.14.4.4 Submit 294
13.14.4.5 History of Actions 296
13.15 UMT Reports 297
13.15.1 User Accounts Summary 297
13.15.2 User Activity 297
13.15.3 User Permissions 298
13.15.4 Invalid User Command 298
13.16 Automatic Notifications 299
13.16.1 State-Driven Notifications 300

13.16.2 Time-Based Notifications 301

1 What's New

Version 10.40.0-Released 2024/12/18

Enhancements

- Added new Admin Permissions that allows more customization while managing user accounts; ability to access the User Management Tool and visibility of the Administration blade are new permissions that can be added or removed from users.
- Removed Legacy ‘NGB Admin’ and ‘State Admin’ Permissions that were inactive
- Added a Terminated work bucket at the bottom of Interstate Transfers work bucket (current FY only), only shows for IST Help Desk Admins and NGB users.
- Updated form Addendum to DD Form 4(NGB 22-5) to autofill the Losing and Gaining State fields within the document.
- Sorted Case History by Date Descending.
- Updated Completed work bucket to only show cases completed in last 365 days.
- Update FY24 Documents in Resource Center with FY25.
- Set Display Career Development Counseling Work Buckets Permission to default for State Level Super Admins.
- Removed the ability to 'Return to Unit' from the Completed Bucket in State Machine.
- Updated Reasons for ETS Report and Not Counseled Report: Added Date Picker, Drillable Metrics, and updated Base Report.
- Updated Date format in Routine Monitoring - Ship Date Management to YYYY-MM-DD to standardize the dates on the page.
- Updated Shipper Management Checklist using new document, updated the labels for each radio button and generated the new PDF when exported.
- Changed "Batch Soldier Phase" name to "Batch Update Soldier Phase" in Command Center - Resource Center - Vulcan RSP.
- Added Soldier Name to the top of Panel 3 when soldier profile is launched from the Vulcan Soldier Search.
- Updated the checklist in Routine Monitoring to current form.

Resolved Issues

- Resolved issue preventing records from populating after adding a date in the filter when using the Follow-up date column filter in the Follow-up work bucket.

Version 10.39.0-Released 2024/11/21

Enhancements

- Enabled users to be able to delete multiple documents from document sections.
- Updated the font color of the username under "My Account" from white to black font color.
- Updated Contact History to open pop-up window for Add button for Soldier case on Extension/Counseling section.
- Removed the limit of 10 total users to receive the email when a new case is initiated and when a case reaches Complete Losing Unit Checklist.
- Updated IST report 'Transfers Received By Unit State'; data displays and metrics are drillable.
- Updated IST report 'Transfers By Unit State'; data displays and metrics are drillable.
- Added an option to delete remarks in Comments Section of Cases.
- Changed Alternate Label to "Extensions that have been Closed" and updated the Description to read: “The total number of extension cases that have been closed (including extensions done outside of RMS).”
- Updated date format Oath of Extension and Officer Certification sections on form 4836.
- Added on Years Extended (FYTD) report with Command Hierarchy and a Date Picker, defaulting to the current FY while allowing selection of other FYs, calculated based on the Extension Execution Date; the first page will summarize extensions by State (1–6 years, other, total) with percentages, all drillable to a detailed report resembling Report Usage (FYTD).
- Updated Vulcan LNO Module to improve performance of work buckets and avoid time outs.
- Added DODID in Panel 3 of Personnel section in all work buckets.
- Added function to sort Remarks by the newest created date first in Soldier Panel 3 of all work buckets.
- Added new height values to Height/Weight Standards Table to better assess soldiers.
- Updated Nightly processing logic to update WarriorDispositionID for warriors no longer in Initial Entry Pipeline. This will resolve the issue in which cases are missing soldier names and other data because the soldier was never dispositioned.
- Updated the checklist called RSP Warrior's Monthly Pre-Ship Counseling Form in Routine Monitoring – Pre-Ship Management.
- Resolved issue where Vulcan State Level Admins couldn’t export Soldier Roster Report.
- Hid Sponsor Survey work bucket.

Version 10.38.0-Released 2024/10/24

Enhancements

- Added a Opt In/Opt Out button for RMS notifications under Help in Ribbon Tool Bar. Any user can decide if they want to receive RMS notifications, this doesn't impact UMT notifications for Admin users.
- Updated Stored Procedures in preparation for IPPS-A TOPICs changes.
- Reopen Case button within Completed work bucket requires Additional Comments to complete action.
- Update IST letter Signature block from LTC Tessmer to MAJ Joiner.
- Added on additional work bucket "Completed" after "Follow-up (All)" work bucket.
- Completed Case Close Summary report to show total of cases that have been completed by State.
- Updated permissions to only allow IST Help Desk and NGB Level users the ability to Verify a Case.
- Updated email notification to send email to IST State Level Users when a soldier from their state has a case initiated.
- Updated Address Labels report to display relevant address data for soldiers in Losing State/Unit Work buckets.
- Updated Counseling By Date Range with Command Hierarchy and configure all metrics into drillable.
- Added Quick Filter for Run Date in Report Usage (FYTD).
- Added Comment tab on Panel 3 for all Soldier entities.
- Updated "In Progress" and "Closed" columns in Extension Status by Unit State (FYTD) Report to be drillable.
- Display State and IPPS-A work buckets for all retention users so they can properly track their soldiers' extensions throughout the process.
- Updated Ship Date Management to include necessary team's channels.
- Updated Panel 4 in LNO Module to display the MEP City name and not the code.
- Updated routine monitoring logic for At Training and Overdue work buckets.
- Update RSP Attachment Discrepancy Report to display relevant information.
- Reset work buckets within the Sponsorship module.
- Updated Training Pipeline to display soldiers currently in Training.

Resolved Issues

- Resolved Soldier Ship Roster issues causing NJ to display higher than expected numbers upon drill down.

Version 10.37.0-Released 2024/09/25

Enhancements

- Automated email notification sent to users when a case reaches their Complete Losing Unit Checklist work bucket.
- Hid Last Four (SSN4) from IST Work buckets search results.
- Added on a field to display DOD ID on Personnel Panel.
- Fix Address Labels Report to have a State Command Hierarchy.
- Enhanced Report Extension Status By Unit State; improved base report and drillable options.
- Created email notification to notify users when a case is in their assigned WB (Battalion, Brigade and State).
- Completed Report Usage (FYTD) that displays, by State, the RMS Extensions performed in application, the total Extensions done outside of RMS, and the percent Completed in RMS for the current FY (replaced “Completed Extension by State” in the Reports blade”).
- Removed Extensions In Progress Report due to duplication in purpose.
- Add on "Close" button on Panel 4 in Completed WB to manually move the case to close.
- Setup "Ship Method" column for LNO Module Search Results to show whether soldier shipped Directly or Traditional.
- Updated Programs and Awards Tab to allow the user to save notes.
- dd to user with Ability to Complete Vulcan Sponsorship Permission, the 'Complete Sponsorship' button in Panel 4 will be clickable; otherwise, it will be gray and disabled.

Resolved Issues

- Resolved issue that users cannot close LNO Ticket.

Version 10.36.0-Released 2024/08/29

Enhancements

- Adjusted Initiate Interstate Transfer bucket so that an email must be created when a case is populated.
- Hid Exit Survey Category (including the Completion and Status Report).
- Added seven-year check on date extensions.
- Added check preventing users from being able to transfer case to the IPPS-A bucket.
- Added stipulation that, if the date of execution is 366 or more days away from ETS, users can only choose an F rule on Page 3 of an extension case.
- Enabled Queue Reports.
- Set counselor to auto-populate based on the State or Territory that is the Losing Unit State when case is created.
- Removed SSN from Counseling.

- Upgraded Uptick to v12.10.
- Added fields to 15 Month to ETS Report.
- Updated LNO Ticket Email.
- Updated LNO Module Work bucket Search results to display name of the MEPS Location Name and not ID.
- Updated RSP Routine Monitoring Work Bucket Logic so that At-Training Soldiers only appear in “In Training” work bucket, task cases overdue for 45 days since “Last Drill Date” move case to “Overdue” work bucket.

Resolved Issues

- Fixed Routine Monitoring launch issue preventing Routine Monitoring Case from launching.
- Removed/Hid Invalid Contract Addendums.
- Resolved RSP Attachment Discrepancy Time-outs.
- Resoled 7x NJ UPC duplication in Soldier Ship Roster.
- Resolved Filter function for columns in Management Center.
- Resolved Reports issue causing Battalion and Company to display as Null, Applied Filters to display as blank.
- Resolved Missed Counseling Reports issue preventing all icons in the ribbon tool bar from being clickable in Fiscal Year Month 6.
- Restored Sponsorship Status By Unit State Report data.
- Restored work bucket data for Transfers By Unit State Report.
- Restored work bucket data for Transfers Received By Unit State Report.

Version 10.35.0-Released 2024/07/25

Enhancements

- Updated StateLevelUser Permission to allow users with the permission to action cases in the Losing and Gaining State Work buckets.
- Updated form names found in IST Forms Drop Down.
- When a signed 4856 is uploaded, Flag 4856 is flagged.
- Added 'Signed DA 4856' to Document Type Dropdown.
- Added required remark when a case is returned from IPPS-A WB.
- Solved for error with time zones when users generated PDFs or set the Extension Execution Date.
- Updated 15 Months to ETS report to include more relevant fields when users customize the report,

and removed fields that don't provide value to the user.

- Deleted Civilian Employment Section, as the section no longer contains data.
- Removed first page of Height/Weight PDF to match AD 2023-11 One Site Tape form.
- Removed Neck Measurement from Height/Weight Assessment in response to AD 2023-11.

Resolved Issues

- Resolved 'W' State Error in 15 Months to ETS section.
- Updated IST - Initiate Interstate Transfer to allow for spaces in the 'City' field; i.e. if the soldier lives in San Francisco, there is a need for a space.
- Fixed Assume Command Error in Hierarchy Rollup.

Version 10.34.0-Released 2024/06/27

Enhancements

- Upgraded to latest version of Uptick.
- Added icon to Document Center blade.
- Updated VSD Permissions to allow or deny user's ability to delete and upload files.
- Added Unit Level User access to State Level Roles to allow full IST access for dual module users.
- Updated Ship Date Format to display in military date format.
- Updated Vulcan Soldier Search to allow for multiple filters when searching for soldier.
- Added restriction so that Vulcan users only see Vulcan soldier search and Vulcan LNO Ticket Search in the Search blade.

Resolved Issues

- Corrected accuracy of IST work buckets.
- Corrected issue where uploading documents erases previous checklist selection on buttons 2, 3 and 5.
- Resolved issue keeping blades from expanding or collapsing in the Documents section.
- Resolved error where users couldn't drill down to UPC in Projected Losses Report.
- Resolved Initial Phase Work-bucket count mismatch.

Version 10.33.0-Released 2024/05/30

Enhancements

- A check was added when a user sends an Extension case to IPPS-A. If the Soldier's intent is to Extend, the case proceeds to the IPPS-A work bucket. If the Soldier's intent is not to Extend, the case

does not move to the work bucket and a pop-up warning will appear.

- All Extension reports were hidden from Vulcan users.
- “Rank” was added to “15 Months to ETS” next to the Soldier name.
- Only users with the “IST: Display Workbuckets” permission can view IST reports.
- Only users with the “Sponsorship: Display Workbuckets” permission can view Sponsorship reports.
- All Vulcan reports were hidden from Extension Users.
- A “DNF” (Did not finish) checkbox was added next to each exercise in the “ACFT Assessment” screen. If checked, a value of 0 is assigned to the associated exercise and it is marked as failed.
- “Lackland AFB” was added as an option in the “IET Site” drop-down menu when adding a user in the “LNO Assignments” module.
- When the Vulcan “Pre-Ship Checklist” is exported, the filled in radio buttons also appear on the exported document.
- When a case is launched from the Panel 3 “Create Case” tab, it launches in Panel 4 with the Soldier’s name and case number.
- For Unit level, Battalion level, and Brigade level users:
    - All AWOL default permissions were removed and “AWOL” was removed from the permissions list.
    - All Vulcan permissions were removed apart from “View Vulcan.”
    - If a user requests access to either of the above permissions, they will not be granted AWOL permissions, and no Vulcan permissions will be checked unless they are manually selected.

Resolved Issues

- An error causing Regional Managers with multiple assigned States to see multiples of LNO tickets was resolved.

Version 10.32.0-Released 2024/05/07

Enhancements

- The “Completed” work bucket was updated to remove cases from the work bucket 45 days after the case is first moved to it. After 45 days, the case is closed and a new case is created.
- All Extension user roles can access the “15 Months to ETS” report at their approved hierarchy level.
- The “Completed Extensions by State” report was updated to display RMS Extensions performed in the application, total Extensions issued, the percent completed in RMS for the current fiscal year by State.

Resolved Issues

- The “Assume Command” feature was experiencing errors since the hierarchy update, and has now been updated to the current version of the unit hierarchy.

Version 10.31.0-Released 2024/03/25

Enhancements

- Warrant Officers and Officers no longer appear in the Extension/Counseling work buckets.
- On page 2 of an Extension case, when a user updates the ACFT row to override an ineligible rule, the date for the Soldier to be eligible depends on their status as a TPU or AGR soldier as Reserve Component Category.
    - If the Soldier’s Reserve Component Category = TPU then any date works.
    - If the Soldier’s Reserve Component Category = AGR then any date within 8 months would make them eligible.
- The “Eligibility” column in Panel 2 of the Extension work buckets search results was updated:
    - Any red x from Panel 4 page 2 is displayed.
    - “HT/WT” was added for Body Composition eligibility.
    - APFT was changed to ACFT.
- The LNO Module and LNO Ticket Search function were updated to show all tickets that are in the “New”, “Returned to LNO (All)”, and “Returned to State” state machines. This includes soldiers that have 'unassigned' in their RSP Site.
- Waivers updating the ACFT eligibility rules in the Routine Monitoring checklist to allow Soldiers to extend were added.
- All instances of “NLN” and “NFN” in the User Hierarchy Management tool were hidden.
- The “Created By” column when performing a Vulcan Ticket Search – LNO was updated. The column reads the username, not the FASC-N. The same applies for the “Created User” column in Shared and Private reports.
- The “Ship Date Management” form in the “Routine Monitoring” work bucket was updated.
    - When a user selects “Yes, the “What is the earliest Ship Date”, the “Comments”, and “Ship Date Counseling occurred on this date” fields are required.
    - If “Yes” is selected and all fields are filled and the user clicks “Save”, an email should be prepared and sent to the email addresses found in Ship Date Management.
    - If “No” is selected, then the “What is the earliest Ship Date” field is auto-populated with the current ship date, and only the counseling date is required. No email should be sent when “No” is selected.
- “Ship Date Management” was moved from the “Resource Center” blade to the “Administration”

blade under the “Vulcan” category.

- RSP Site Setup was updated for Keyboard Accessibility. Users can navigate the section using only the keyboard.

Version 10.30.0-Released 2024/02/26

Enhancements

- The “Sort Case History” section in the Panel 4 “Case History” tab was updated to display the most recent case changes first.
- The “RMS Metric Brief” and “First Counseled” reports were removed from the “Reports” blade.
- The “Initiate Transfer Worksheet” form 22-5 was updated to the most current version.
- An email notification is sent to all users in the LNO Edit Ticket Email Distribution List when a new LNO ticket is created.
- When a remark is made in the Panel 3 “Soldier Remarks” tab, the “Created By” field now displays the full name of the user instead of their FASC-N.
- The “User Hierarchy Management” tool in the “Administration” blade was updated to populate user names as soon as they are approved for access in UMT.
- Web files were updated to display new HTML Web Help guides.
- The “User Management” and “Help” ribbon toolbar items were right aligned.
- All AWOL modules and reports were hidden from all roles. The AWOL Training Video was hidden in the “Resource Center” blade and the RMS AWOL user guide was hidden in the “Document Center” blade.

Resolved Issues

- Solved for an issue in the "New" LNO Ticket work bucket that caused some tickets to not display after creation.
- An error where reports displayed incorrect Unit States was resolved.
- An error causing the users name in the “My Account” drop-down to appear as numbers was resolved.

Version 10.29.0-Released 2024/01/22

Enhancements

- The RMS Case ID on page 4 of an Extension case was hidden.
- The “Duty Position Status” field on page 4 of an Extension case is now a required field. This field only appears if SRIP is selected in the “Select Program” drop-down.
- Access to the “Create LNO Ticket” function in the Panel 3 “LNO Tickets” tab was limited to only

Vulcan LNO Users.

- The “15 Months to ETS” report was updated so that users can only see their specific unit when loading the report.
- All fields in the DA4836 become locked once a Soldier signs it. Officer Certification blocks remain unlocked so the officer can sign and edit their information.
- The “Counseling Management” table in the “Administration” blade was updated:
  - Personal designators (Mr., Mrs.) were added.
  - Phone numbers now allow dashes (-).

Resolved Issues

- On the Production site, the “IST Days in” work bucket was not loading. This error has been resolved.
- An error when users request access due to the SAAR form missing was resolved. New users can request access with error, and existing users can request a change without error.
- An error causing the incorrect state to display when generating a DA4836 for units that have changed states has been resolved.

Version 10.28.0-Released 2023/12/28

Enhancements

- The “Extension Eligibility” screen displays “Body Composition” eligibility rules and provides the user the ability to update and override the eligibility if eligibility rules are met.
- A stored procedure that checks if a case has met the Height/Weight requirements was added to the “Eligibility Rules” on page 2 of an Extension case under the first line.
  - The rule reads: Body Composition Test. Soldier failed to take or pass current height/weight requirements in the previous 6 months. See AR 600-9, AD 2023-08, and AD 2023-11 for further guidance and waiver qualifications.
  - The information scroll over in the “Rule Description” column reads: Eligibility fails when ATMS Body Composition date reflects post 6 mo. from the date of verification, and/or a Fail is reflected in the HT/WT results AND the Body Fat Results.
- The ACFT Eligibility Rule on page 2 of an Extension case was updated to read:
  - ACFT. AGR- Soldier failed to take or pass an ACFT in the previous 8 months. TPU – Soldier failed to pass their last physical assessment. See PPOM 22-023 for further guidance and waiver qualification.
- Page 2 in Panel 4 of an Extension case was updated. When a case with a red X is updated, the X becomes a yellow checkmark to note that the field has been updated. This will differentiate cases that were originally eligible and those that had to be updated. When user hovers over the yellow

checkmark, tooltip will display "This field has been updated."

- Height and Weight assessment values were added to the Panel 3 “Personnel” tab.
- On page 6 of an Extension case, when a user clicks “PRINT DA4836”, the form populates with signature fields that can be signed with a CAC card with one click (Only in Adobe PDF Readers).
- The signature at the bottom of the cover letter printed in the Case Panel (Panel 4) of an IST case was updated to:
  - Crystal M. Tessmer
    LTC, AG
    Chief, Attrition Management Branch
    Army National Guard
- The “Days in Work Bucket by Case” report was created to track the creation of an IST case through its completion. The report can only be used by NGB Level, NGB Level Admin, and IST Help Desk Admin users.
  - Vulcan LNO Group
- When a user clicks the “Export” icon in the Panel 4 “Height & Weight Assessment” screen:
  - A prefilled DA 5500 form is downloaded if they are male.
  - A prefilled DA 5501 form is downloaded if they are female.
- IET Site names in the “LNO Assignments” admin tool were updated in the “Administration” blade.
  - Fort Rucker to Fort Novosel
  - Fort Lee to Fort Gregg Adams
  - Fort Benning to Fort Moore
  - Fort Gordon to Fort Eisenhower
- The “Eligible by ETS Date” report was renamed to “15 months to ETS.” Fields in the base report display the State, UIC, Name, ETS Date, Days to ETS, Eligibility, and Intent and Comments.
- The search results when performing a Soldier search were updated to only display one instance of each Soldier.
- The table in the “Uniform Distribution” module in the “Administration” blade was updated so that rows can be selected for edit/delete using the keyboard.
- The “LNO Assignments” module in the “Administration” blade was updated so that rows can be selected for edit/delete using the keyboard.

Resolved Issues

- Duplicate cases were removed from the Vulcan “Awaiting Attachment to RSP” work bucket.

Version 10.27.0-Released 2023/11/30

Enhancements

- “State” was removed as a transfer option when “Alert Chain of Command” is selected in Panel 4 Page 1.
- The “Alert Chain of Command” logic was updated:
  - Cases can be sent to the Battalion and Brigade levels. When the user clicks “SAVE,” the case is moved to the selected work bucket and an email is sent using the following logic:
    - If the case is sent to Battalion, an email will be sent to any Battalion Level User with the parent UIC, as well as Access Approved in RMS.
    - If the case is sent to Brigade, an email will be sent to any Brigade Level User with the parent UIC, as well as Access Approved in RMS.
- Within IPPS-A, State, Brigade, and Battalion Work Buckets, users are able to return cases to the unit level user via the "Return to Unit" button on Page 6 of the case. This button will send an email notification with notes to the user that originally processed the case and move the case to the proper work bucket.
- RSP Warrior’s “Pre-Ship Packet Review” checklist was updated in all "Shipper Management" work buckets.
- LNO notifications were enabled so that users are aware case files in RMS LNO are ready to work.
  - Vulcan State Users should receive notifications when ticket status is either “New” or “Returned to State.”
  - LNO users should receive a notification when ticket status is “Returned to LNO.”
- The following Resources within in the "References" blade were updated:
  - FY24 ARNG SRIP FINAL
  - FY24 ARNG SRIP Update 1
  - FY24 VolEd Policy
  - Total Army Sponsorship
  - Army Regulation 135-91
  - The "UMT Roles and Associated Permissions" document was moved to the "Document Center" blade
- "Eligible by ETS Date" report will allow users to track extensions for their state. This report will be limited to State Level Users and above for the time being.
- In the “My Account” ribbon menu drop-down, “My Profile” was named to “Upgrade/Revalidate.”
- The “Switch Profile” option was removed from the “My Account” ribbon menu drop-down.
- All users now have access to the “My Reports” blade in the Command Center.
- 508 Compliance Remediation conducted:

- In the “Category Manager” module in the “Administration” blade, users can select table rows to edit/delete using their keyboards.
- In the “Create Extensions Counseling” module in the “Administration” blade, users can select table rows to edit/delete using their keyboards.

Resolved Issues

- An error where users were unable to complete extensions when they returned to Page 5 of an extension case after moving to Page 6 has been resolved. The error would add unnecessary character fields after the number to the “Number of Extensions Previously Granted to Current DD Form” field causing an error.
- On the Production site, an issue was resolved where soldiers appeared twice in Extension Work Buckets.
- On the Production site, an error with the “Shipper Management” work bucket filters was resolved. Work buckets were not filtering based on time until ship date.
- An error causing the “Eligible by ETS Date” report to not load was resolved.

Version 10.26.0-Released 2023/10/30

Enhancements

- The “Counselor” drop-down in the Panel “Case Details” tab was updated to only contain two options: “Latia Townsend” and “Roger Nether.” The “Add Counselor” option was also removed.
- When a user selects a Soldier(s) and clicks “ACKNOWLEDGE RSP ASSIGNMENT” in the Panel 2 “Pending RSP Acknowledgement” work bucket, the section refreshes, the selected Soldier(s) no longer appear in the work bucket, and the work bucket numbers are refreshed.
- Initial Entry Training Sites were updated:
  - Fort Rucker to Fort Novosel
  - Fort Lee to Fort Gregg Adams
  - Fort Benning to Fort Moore
  - Fort Gordon to Fort Eisenhower

Resolved Issues

- On the Production site, an error causing duplicate Soldier cases to appear in Extension work buckets was resolved.
- An error causing Vulcan work buckets to display incorrect work bucket counts was resolved.

Version 10.25.0-Released 2023/10/05

Enhancements

- The “Years” field in page 5 of an Extension case is required for the case to advance. The number in the “Years” field can’t be 0. If conditions are satisfied, the case should move forward. If they are not satisfied, then a message appears stating "Extension Years or Extension Months or Extension Days should be greater than 0.”
- The following fields in page 5 of an Extension case are now required fields before a user can record extension information:
    - “Date Extension will be Executed”, “Length of Extension”, “Name, Grade, and Branch of Commissioned Officer”, and “Number of Extensions Previously Granted to Current DD Form.”
- A new work bucket called “Override Requested” was added under the “Soldiers beyond their ETS date” work bucket. The “Override Requested” state was also created, as well as a new action called “Request Override” which will move cases to the “Override Requested” state. A new action called “Return to Unit” was also created to return all items in “Override Requested” back to their appropriate state.
- On page 2 of an Extension case, if a case field is marked with a red ‘x’, the button should display “Request Override.” If that button is clicked, the case is moved to the “Override Requested” work bucket and a notification is sent to the Admin who can approve the override.
- The “Return to Unit” button was added to page 6 in Panel 4 of an Extension case. This button sends an email to the appropriate unit level user (whoever prepared the case), alerting them that the case has been returned to them.
- “Interstate Transfer Worksheet 22-5” in the Panel 4 “Forms” drop-down was updated. Soldier data fields are pulled in and automatically populate.
- The “DT” column was added to the Panel 2 Sponsorship work bucket results.
- The “State Level Super Admin” role can now access the Transition Services work buckets.
- In Panel 4 of a “Budget Review” case, the action buttons in the “Case Details” tab were configured. From left to right the buttons should be:
    - “Budget Sign Off (Initial Phase)”, “Budget Sign Off (Service Case)”, and “Budget Sign Off (Transition Phase).”
- Cases in the “At Training” work bucket are now “read only”. Panel 4 is view only and does not allow edits to be made.
- In the “Soldier Status” tab of Panel 3, the “BHO Ready” fields was renamed “BHO scheduled.”
- LNO notifications were enabled so that users will be aware that case files in RMS LNO are ready for work.
    - Vulcan State Users should receive notifications when ticket status is either “New” or “Returned to State.”
    - LNO users should receive a notification when ticket status is “Returned to LNO.”
- The “Physical Assessment” module in Panel 4 of a Routine Monitoring case was broken into 3

individual items:

  - “ACFT Assessment.”
  - “OPAT Assessment.”
  - “Height & Weight Screening.”

- In the “Reports” blade, all reports currently under the “DPRO IET Reports” bullet have been hidden.
- The “New Folder” button in the Panel 3 and Panel 4 “Documents” tab was hidden. This button should only be visible in the “Document Center” blade.

Resolved Issues

- On the Production site, an error causing duplicate Soldier cases was resolved.
- On the Production site, after selecting “Interstate Transfer Worksheet 22-5” in the Panel 4 “Forms” drop-down, a runtime error when clicking “Print PDF” was resolved.
- On the Build site, an error when clicking on the “Vulcan RSP” link in the “Document Center” blade was resolved.
- An error where LNO cases were not populating the resolution pop-up and not allowing cases to save/close without a Resolution ID was resolved.
- An error when selecting a date in the “Personal Data Verified” module of a Routine Monitoring case was resolved.
- On the Production site, an error causing the work buckets in the “RSP Shipper Management” work folder to display the same results was resolved.
- An error causing work bucket and search results to be mismatched was resolved.
- An error causing the “Eligible by ETS Date” report to not load was resolved.

Version 10.24.0-Released 2023/08/30

ENHANCEMENTS

- A check was implemented preventing extensions beyond 7 years.
- The “Eligibility Override” button was updated so extensions are allowed for eligible cases if ACFT and PHA assessments meet current standards.
- A new message pointing users to contact a supervisor to further extension cases was created. User roles who can see the message include: State Level, Unit Level, Sponsor, Battalion Level, and Brigade Level.
- User roles for moving Unit, State IST Coordinator, and NGB level permissions across the IST work buckets were updated.
- The “Transition Services” case type was enabled.
- The ability to save comments for LNO tickets in the “New” or “Returned to State” bucket was added

for the Vulcan LNO role.

- A save button was created for the Routine Monitoring “BAH Form” module to verify the check instead of needing to generate a PDF.
- The Routine Monitoring “Physical Assessment” module was broken into 3 individual items located in the “RSP Routine Monitoring” folder:
  - ACFT
  - OPAT
  - Height & Weight Assessment
- The ability to create folders was restored to the “Document Center” tab so that users can create folders and sort uploaded documents.

RESOLVED ISSUES

- On the QA, Exercise, and Production sites, an error when saving “Early Ship Date” info for Routine Monitoring “Ship Date Management” cases was resolved.
- The “Reasons for ETS” report was not pulling in all cases that should be populating in the report. This error has been resolved.

Version 10.23.0-Released 2023/07/26

ENHANCEMENTS

- When a user inputs 12 months in the “Length of Extension” field in button 5 of an Extension case, it is converted to 1 year for the DA4836 form.
- The “Created Date” column was added to the Panel 2 work bucket results for all IST work buckets excluding ‘Follow-up” and “Follow-up (All)”.
- Only the following roles can see/action the “Verify Orders” button in the “Verify Case” work bucket:
  - NGB Level Admin, NGB Level, Developer Admin, IST Help Desk, IST Help Desk Admin
- Only the following roles can see/action the “Complete Case” button in the “Interstate Transfer - Complete Case (Gaining State)” work bucket:
  - NGB Level Admin, NGB Level, Developer Admin, IST Help Desk, IST Help Desk Admin
- The BAH capture process was added to the Panel 4 “Routine Monitoring” tab.
- The “Transition Services” case type was unhidden.
- The “Transition Services” work bucket is now visible to users with the “NGB Admin” role.
- Only NGB Level Admins can see/action the controls in the “Ship Date Management” module in the “Administration” blade.
- In the “LNO Assignments” module in the “Administration” blade, “Enterprise/AKOID” was changed

to “Name” in the grid when the module first opens and in the “LNO User” pop-up window.

- The “RSP Portal” blade was added to the Command Center
- RSP tables and data were transferred to the RMS application.

RESOLVED ISSUES

- An error causing users with the “State IST Coordinator” role to be unable to action, terminate, or edit cases was resolved.
- An error causing Warriors being assigned to incorrect States due to duplicate UPCs was resolved.

Version 10.22.0-Released 2023/06/28

ENHANCEMENTS

- Users can save both the “Physical Assessment” and “Height & Weight Assessment” sections in a Routine Monitoring case if both have information inputted.
- Users can now upload multiple documents that overwrite current documents when named the same file name.
- The “Ship Date Management” module was created in the “Administration” blade under the “Vulcan RSP” folder. Users can input email addresses for other users that will receive notifications from the “Routine Monitoring- Ship Date Management” section in a Vulcan case.
- The 4856 Counseling Form was updated in the UI in the following locations:
    - Extension Counseling work bucket – Panel 4 Button 1 - Prepare New 4856 Counseling Button
    - Extension Counseling work bucket - Panel 4 “Counseling” tab - Prepare New 4856 Counseling Button
    - Career Development Counseling work bucket - Panel 4 Button 1 - Prepare New 4856 Counseling Button
    - Career Development Counseling work bucket – Panel 4 “Counseling tab” - Prepare New 4856 Counseling Button
    - AWOL Recovery work bucket - Prepare 4856 work item - Panel 4 Prepare New 4856 Counseling Button

RESOLVED ISSUES

- An error with the Case Details controls not allowing State IST Coordinator users to initiate transfers or terminate cases was resolved.
- An error with the “Enterprise/AKOID” drop-down not populating information was resolved.

Version 10.21.0-Released 2023/05/31

ENHANCEMENTS

- The “IPPS-A” work bucket can now be viewed by State Level Admin users.
- Buttons 3 and 5 in Panel 4 were updated so that when the “COMPLETE CHECKLIST” (button 3) and “COMPLETE CASE” (button 5) buttons are clicked, the case saves and propels the case forward to the next button without allowing further changes. Just clicking “SAVE” will no longer propel the case forward.
- The “ADD” RSP site module button was renamed “Add New RSP” and a space was added between the button and drop-down.
- The “Stripes for Skills” item was added to the “Routine Monitoring” section in Panel 4.
- The order of the events captured for the ACFT were changed to match the order in the scorecard.
    - Max Deadlift, Standing Power Throw, Hand-Release Push-Up, Sprint – Drag – Carry, Plank, 2-mile run.
- The “Stripes for Buddies” item was added to the “Routine Monitoring” section in Panel 4. The “Stripes for Buddies” option was also removed from the Panel 3 “Programs & Awards” tab.
- In the Panel 3 “Soldier Status” tab, the “GED + Enlistment” checkbox was removed and “09M Enlistment” and “ARMS 2.0 Enlistment” were added.
- In the Panel 4 “Ship Date Management” item of a Routine Monitoring case, when a user selects “YES” and picks a date earlier than the “Current Ship Date” it should save and send out a notification to users that perform actions outside the application.
- The “DPRO” option was removed from the “Projects” drop-down in the ribbon menu.
- The “CREATE EXTENSIONS FORM” button in the “Create Extensions Counseling” screen was renamed “CREATE COUNSELING FORM”. The “Create Extensions Counseling” screen can be accessed from the “Administration” blade.
- A notification was generated for all users listed in the “Ship Date Management” module. The notification displays:
    - Fields from Routine Monitoring:
        - Current Ship Date
        - What is the earliest Ship Date?
        - Comment
- The “My Reports” blade was updated to only be accessible by NGB Level Admin and State Level Super Admin users.
- The “Height/Weight Assessment” screen in the “Administration” blade was updated so users can move to the next case directly after inputting data.
- The “Drill Date” column in the “RSP Site Setup” screen found in the “Administration” blade was updated to be display as YYYYMMDD.

RESOLVED ISSUES

- The following extension rules under button 3 in Panel 4 of an Extension case were displaying the wrong length of extension options available. They were updated so that once a rule is selected, button 5 reflects the appropriate length options.
- An error causing NPS Soldiers to be added to IPPS-A as PS was resolved.
- An error involving remarks made in the Panel 3 “Soldier Remarks” tab not showing up in the “All Remarks” tab was resolved.
- On the QA site, an error with the “Years Extended” report was resolved.
- On the QA site, an error with the “Completed Extensions by State (YTD)” report was resolved.
- On the Exercise and Production sites, the training video links in the “Resource Center” blade open an error page.
    - This error has been resolved.

Version 10.20.0-Released 2023/05/3

ENHANCEMENTS

- The requirements for the ACFT soldier eligibility rule were updated. A green checkmark is displayed when:
    - Army Fitness date administered has a date within 8 months (AGR Soldiers) or has a date (All other Soldiers)
    - Test Result field displays P or W. Supporting Documentation is not required if the first 2 are true.
    - If Fitness Test Administered date is beyond 8 months (AGR Soldiers only), or the Fitness Test Result = F, Supporting Documentation will be required in order to switch Red X to Green checkmark.
- The LRP bonus incentive option was hidden in Panel 4.
- Extensions issued out of the “Career Development Counseling” work buckets will now appear as “Extension” case types in Panel 3.
- The “Complete Case – Gaining State” button 5 checklist was updated to identify Officer/Warrant Officer Only questions and will accept “Yes” or “No”, not just “Yes”.
- The “Days Until Ship” field was added to the Panel 3 “Vulcan Soldier Summary” section.
- The DisplayName for the UMT “Admin” role was updated to instead display “Developer Admin”.
- The URL that displays when an LNO notification email is sent out was updated to display v4 instead of v3.

RESOLVED ISSUES

- An error causing cases to be automatically closed after their extensions are executed in IPPS-A was resolved.
- An error when attempting to fill out the Witnessing Official's information was resolved.
- Errors when uploading files with completed "File Name" and "Description" fields were resolved.
- An error in the "Routine Monitoring" section involving the red "X" icon by the "Personal Data Verified" line not updating to the green check mark was resolved.
- The "Reports Usage" report returned no data found.
    - This error has been resolved.

Version 10.19.0-Released 2023/04/5

ENHANCEMENTS

- The ACFT eligibility rules in the button 2 screen of Panel 4 were updated to say: "ACFT. AGR - Soldier otherwise eligible but failed to take or pass an ACFT in the previous 8 months. TPU - Soldier otherwise eligible but failed to pass their last Physical Fitness Assessment".
- The "Return to IPPS-A" button in Panel 4 is not available to a case unless it meets the following requirements:
    - Must have a case
    - Intent = Extend
    - Has a DA4836
    - YearsExtend >0 or MonthsExtend >0 or DaysExtend >0
    - Current ETS >= Date Extension Executed (and this date is not null)
- The "Date Extension Will Be Executed" calendar picker in Panel 4 Button 5 was updated. Users are only able to select dates on or after the current date.
- Section 8 in Form 4836 was updated. The "XXXX's" blocking the text were replaced with a strikethrough.
- Starting in Panel 4 Button 2 of an IST case, the "SAVE" button was updated to move the case forward through the workflow.
- The "RSP Recruit Pre-Ship Packet Review Checklist" in Panel 4 of an "RSP Routine Monitoring" work bucket was updated to the "RSP Warrior's Pre-Ship Checklist".
- The checklist in the Panel 4 "Shipper Management" section was updated to match the options available on the "RSP Warrior's Pre-Ship Checklist". The capability to make and save selections, then export saved selections into an exportable form was added.
- The Panel 3 "Disposition" tab can now be accessed by Vulcan Users.
- Any links reflecting RMS v3 were updated to v4.

- A script was created to close or terminate old cases that cannot be closed/terminated in the UI.
- All reports from before January 31, 2023 were deleted from the “My Reports” blade.
- The Transition Services case type was hidden from view in the application.

RESOLVED ISSUES

- An error when generating a SRIP(RE25) contract was resolved.
- The “Extension/Counseling” and “Career Development Counseling” work buckets were not filtering work bucket results by State hierarchy when assuming command.
  - This error has been resolved.
- “ARNG/AGR” in Section 5 of Form 4836 was not populating correctly.
  - This error has been resolved.
- Core IST data was not saving.
  - This error has been resolved.
- An error exporting the results of a Vulcan ticket search to Excel was resolved. Previously, a username was displaying in the “Status” column of the Excel spreadsheet instead of the ticket’s status.
- Spaces in the “LNO Edit Ticket Email Distro List” under the “Administration” blade that caused errors when creating or moving LNO tickets between work buckets were corrected.
- Dates were not displaying in a consistent format when using a date picker.
  - This error has been resolved.
- An error with the “Projected Losses” report displaying no data was resolved.
- An error with the “Contact Information For Open Cases” report displaying no data was resolved.
- An error in the “Counseling By Date Range” report was resolved.
- An error with the “Extension Status by Unit State” report not returning any data was resolved.

Version 10.18.2-Released 2023/03/23

ENHANCEMENTS

- The “Sent to IPPSA Dt” column was added to the Panel 2 results of the “IPPS-A” work bucket.

RESOLVED ISSUES

- An error when generating a SRIP contract was resolved.

Version 10.18.1-Released 2023/03/16

ENHANCEMENTS

- ETS DT calculation is now locked in when a case is sent to IPPS-A. Users will no longer be able to move cases directly to the “IPPS-A” work bucket from the “State” or “Unit” buckets without specific criteria being met.
- The option to transfer a case to the “IPPS-A” work bucket is now hidden from the “Transfer” drop-down for every work bucket except for the “State” and “Brigade” work buckets.
- The “Date Sent to IPPS-A” column was added to the Panel 2 results in the “IPPS-A” work bucket.
- The Panel 3 “Disposition- Admin Override” tab was updated to be only accessible to users with the following roles: NGB Level, NGB Level Admin, Vulcan NGB Level Admin, and Vulcan State Level Admin.

RESOLVED ISSUES

- An error when clicking the “GO” button for a Physical Assessment was resolved.
- An error when LNO users moved LNO tickets between the different work buckets was resolved.
- Missing work bucket counts for the Routine Monitoring folder were corrected.
- An error that occurs when creating an LNO ticket was resolved.

Version 10.18.0-Released 2023/02/22

ENHANCEMENTS

- The work bucket counts of the “Contact Soldier” and “Initiate Sponsorship” were reset.
  - Records created prior to November 1, 2022 were closed out.
- The “Extensions Eligibility Rule” description in Panel 4 were updated to “ACFT. Soldier otherwise eligible but failed to take or pass the latest Physical Assessment”.
- The “ETS Date” column was added to the Soldier Extension Table to update when an Extension is completed.

RESOLVED ISSUES

- An error when saving in Panel 4 of any IST work bucket was resolved.
- Users were not receiving email notifications when an LNO ticket was assigned to their state.
  - This error has been resolved.
- The “Missed Counseling” report did not load on the Exercise or Production sites.
  - This error has been resolved.
- No data was found in the “AWOL Status by Unit State” report.
  - This error has been resolved.
- The “Extensions in Progress” report was not returning any data.

  - This error has been resolved.
- The “Report Usage” report was not returning any data.
  - This error has been resolved.
- Users at the NGB level could only use the “Assume Command” function for their parent State and not any others.
  - This error has been resolved.
- An error when attempting to load the “Eligible by ETS Date” report was resolved.

Version 10.17.01-Released 2023/01/31

ENHANCEMENTS

- When the “Return to IPPS-A” button is clicked in Panel 4 of a case in the IPPS-A work bucket, the “UpdatedDate” column in the Extension table is updated but the case remains in the IPPS-A work bucket until the ETS date is confirmed. Then it moves to the Completed work bucket. Previously, when clicking the button, the case would immediately move to the Completed folder

Version 10.17.0-Released 2023/01/18

ENHANCEMENTS

- A new column called “SentToIPPSA_DT” was created in the Soldier Extension table. The stored procedure was updated to add the date sent to IPPSA field in the Soldier Extension table.
- The logic in the IPPS-A work bucket was updated to automatically move cases to the Completed folder once the ETS Date is updated.
- The “Entered into IPPS-A” button was renamed “Return To IPPS-A” and updated to manually add a case back to the IPPS-A feed update queue. The pop-up messaging has also been updated to reflect this new logic.
- The Loan Repayment Program (LRP) incentive was made available in Panel 4, button 4.
- The logic for the “Completed” work bucket was updated so that it refreshes each calendar month.
- The LNO Ticket Search was updated to filter out Terminated tickets.
- Users can input multiple Soldier Phase cases, select and save a phase for multiple users, and update the phase for saved cases. The controls are located in the Batch Soldier Phase link within the Administration blade.
- The Vulcan RSP Module roles were updated so that batch inputs for Uniform Distribution, Physical & Height/Weight Assessments, STRM Course Completion, Tattoo Screening, and Soldier Phase are available to all users.
- The LNO Ticket Search Status column was re-added to the search results of an LNO Ticket search.
- Any instances of “APFT” were updated to read “ACFT” instead.

RESOLVED ISSUES

- A spelling error in the Panel 4 “Eligibility Rules” section was corrected.
- For Routine Monitoring cases, the logic around Body Fat % not Passing a case when all requirements are properly met was corrected.
- For Routine Monitoring cases, the logic around Height/Weight assessment was corrected so that weight inputs are rounded to the nearest pound and height measurements are rounded to the nearest half inch automatically, per form requirements and operation regulations.
- MOS and Physical Demand data issues that prevented accurate scoring for the OPAT assessment for Routine Monitoring cases were corrected.
- An error causing the OPAT Physical Assessment to confuse 15D Enlisted standards for 15D Officer standards when scoring the assessment was resolved.

KNOWN ISSUES

- The Height/Weight standards table is missing data for heights 58/59 and cannot be scored accurately. An update will be pushed as soon as available.
- The “Assume Command” blade in the Command Center is not fully operational.
- Continued impact from IPPS-A R3 data issues.

Version 10.16.0-Released 2022/12/07

ENHANCEMENTS

- The work bucket order was changed to match the flow of a Soldier working through RMS- Vulcan then Retention. The Vulcan RSP Case Work Parent folder and its same workflow appears above the RMS Case Work Parent work bucket.
- The following documents were deleted from the References section in the Resource Center blade: ARNG SRIP Policy FY22, ARNG SRIP Policy FY22 Memo, RNG SRIP Q1 Top 3 State MOS.
    - The following documents were added to the reference section: FY23 VolEd Policy, FY23 SRIP Implementation-final, FY23 ARNG SRIP FINAL, FY23 ARNG SRIP 1QTR Top MOS List.
- SAAR documents are now required for access to SMMS applications and will need to be uploaded into UMT before access can be approved for Users. The form is available on the SMMS home page.
- The Physical Assessment module in the Administration blade allows for batch inputs for available test fields for the ACFT and OPAT options.

RESOLVED ISSUES

- An error causing the HS Grade/GED Verified item’s “Go” button to not work was resolved.
- Typing in the calendar field of an ACFT Physical Assessment case in the Administration blade

created an error but selecting from the calendar picker does not.

- This error has been resolved.

KNOWN ISSUES

- Soldier in Soldier Search but not Vulcan Soldier Search. This issue is being addressed on a case-by-case basis as it is not a systemic issue among the broader population of users.

Version 10.15.0-Released 2022/11/01

ENHANCEMENTS

- After a user selects a screening date in the Tattoo Screening module within the Administration blade, the user sees a list of cases that allow for the selection of the 'Does' and 'Does Not' fields under the Violates Policy? column. Once saved, the Completed column populates the user.
- The Shipper Management checklist was updated to match the options available on the RSP Warrior's Pre-Ship checklist. Users can make and save selections, then export saved selections into exportable form.
- The RSP Negative End Strength work bucket was hidden from view in the application.
- Users can add and edit information in the Unit Information module in the Administration blade.
- Custom controls were created to allow users to save the Message Type, State, and Email address fields in the IST Notifications (Opt In) module in the Administration blade. Users can also edit or delete saved updates.
- The 'OVERRIDE ELIGIBILITY' button in Panel 4, button 2 of an Extension case only appears for users with NGB Admin and State-level Super Admin roles. For all other users, the button reads 'CONTINUE' instead.
- In Panel 4 of a case in the IPPS-A work bucket, clicking 'Entered into IPPS-A' sends that information to IPPS-A for updating and closes the Extension case.
- In the Checklist module in the Administration blade, users can create custom Section Headers and Items that populate in the Checklist.
- The STRM Course Completion module was hung in the Administration blade.
  - Selecting a course from the phase drop-down brings up a list of cases.
  - Cases that populate from the phase drop-down can be marked as complete if the Soldier has taken the course test.
  - Once saved, the 'Date Completed' column populates with the test date.
- The OPAT option was added to the ACFT Assessments module in the Administration blade. Users can select the test date which passes to any cases where Physical Assessment data is input and saved.

RESOLVED ISSUES

- Ticket cases in the Returned to LNO work bucket were displaying even if they were not created by the current user.
    - This error has been resolved.

  In an OPAT physical assessment, the Level/Shuttle/Total field values for the Interval Aerobic Run were passing to the wrong fields on the scorecard form. The total populated in the level field, the level value populates in the shuttle field, and the shuttle value populated in the total points field.
    - This error has been resolved.
- The Vulcan Cases tab in Panel 3 did not properly populate cases tied to the Soldier in Panel 4.
    - This error has been resolved.
- The Vulcan Cases tab in Panel 3 of a Vulcan case was not populating Vulcan cases as expected.
    - This error has been resolved.
- An error in Panel 3 causing the Contact Info tab to return no data was resolved.
- Starting in the Exercise environment, the ETS Date was not populating when Rule A – 1 Year is selected from the Length of Extension drop-down in button 5 of an Extension case.
    - This error has been resolved.
- An error involving the ‘Date Extension Will Be Executed’ field not correctly passing to form DA4836 was resolved.
- Users would receive an error when clicking Print PDF in the Prepare New 4856 Counseling window in Panel 4.
    - This error has been resolved.
- The Last/First Name fields for Counseling Form 4856 were cut off if the inputted information was too long.
    - This error has been resolved.
- The Not Counseled report was not returning any data.
    - This error has been resolved.
- On the Exercise and Production sites, the Create Case tab in Panel 3 was not populating the controls or cases tied to the Soldier.
    - This error has been resolved.
- Data was not being saved when attempting to add request form information to approve change requests.
    - This error has been resolved.
- The check preventing users from using SMMS applications in Internet Explorer was not functioning in any environments.

- This error has been resolved.

KNOWN ISSUES

- Soldier in Soldier Search but not Vulcan Soldier Search. This issue is being addressed on a case-by-case basis as it is not a systemic issue among the broader population of users.
- Users experiencing Multiple Doc Upload issues, investigating.

Version 10.14.0-Released 2022/09/22

ENHANCEMENTS

- The term 'SIDPERS' was replaced with IPPS-A in the custom controls within panel 4 of the IPPS-A work bucket.
- The ability to add or edit information in the IST Unit Information module within the Administration blade was added.
- The 'PFA/APFT Assessments' module in the Administration blade has been updated to the ACFT standards.
- OPAT can be selected as a Physical Assessment option and the available fields can be saved to the OPAT Scorecard for export.
- Under the Soldier Remarks tab in Panel 3 of a Vulcan case, any remarks made around the Soldier are collected and can be viewed in the table at the bottom of the tab. All remarks are viewable instead of having to first select a case type.

RESOLVED ISSUES

- (Extension)- The 'ENTERED INTO IPPS-A' and 'RETURN TO UNIT' DEI buttons under button 6 in Panel 4 of an Extension case did not perform actions when clicked.
  - This error has been resolved.
- (Extension)- Button 4 in Panel 4 of an Extension case created an error when required fields are left N/A instead of selecting Yes/No.
  - This error has been resolved and the N/A field options were hidden. The application defaults to 'No' before the user makes their selection.
- (Extension)- The Extensions in Progress report did not return any data.
  - This error has been resolved.
- (Extension)- The First Counseled report did not return any data.
  - This error has been resolved.
- (Extension)- The Eligible by ETS Date report did not return any data.
  - This error has been resolved.

- (Extension)- The Counseling by Date Range report did not return any data.
  - This error has been resolved.
- (Vulcan)- Users would receive an error message when attempting to save the Phase Input tab in Panel 3 on the Production site.
  - This error has been resolved.
- (Vulcan)- On the exercise and Production sites, the RSP Routine Monitoring work buckets are not displaying case counts and are not filtering the Overdue work bucket correctly.
  - This error has been resolved.
- (Vulcan)- The Returned to LNO (All) work bucket count doesn't match the search result count.
  - This error has been resolved.
- (Vulcan)- The Vulcan Cases tab in Panel 3 was not populating the expected Vulcan cases.
  - This error has been resolved.
- Under the Document Center blade in the Command Center, the link to the Vulcan RSP user guide did not correctly populate on the Production site.
  - This error has been resolved.

Version 10.13.1-Released 2022/08/31

RESOLVED ISSUES

- The Extension code was updated so that when selected, only Rule B in button 3 of Panel 4 takes the user to the Incentive Request screen (button 4). All other Rules under Button 3 now skip button 4 and take the user directly to the Extension Information screen (button 5) where they can input information to pass to DA4836.
  - Previously, users received an error that would not let them complete the extension process.

Version 10.13.0-Released 2022/08/25

ENHANCEMENTS

- The RSP Recruit Pre-Ship Packet Review Checklist was updated to the RSP Warrior's Pre-Ship Checklist. The form populates the relevant information to the following fields: Name, Ship Date, Marital Status, Dependents, etc.
- The RSP BAH Addendum form was updated. The form populates the relevant information to the Name, RSP Site, Ship Date, Marital Status, and Dependents fields.
- The RSP Recruit Monthly Pre-Ship Counseling Form was updated to the RSP Warriors Monthly Pre-Screening Eligibility Screening Form.
- Any instance of the acronym APFT in the Routine Monitoring Physical Assessment tab in Panel 4

was changed to ACFT.

- The Complete Case- Gaining State section (button 5) in Panel 4 was modified to express that all checklist items must be marked YES before the case can be completed.
- The Case Details section in Panel 4 now reflects the Soldier's risk factor status based on the Risk Levels rules. The High Risk column in the Panel 2 results screen also reflects the status of a Soldier's risk factor, if they are at High Risk.
- Users can now select from the Risk Note drop-down in the Risk Factors tab in Panel 4, add the note, and have the note save and populate in the Case History tab.
- IST Help Desk Admins can override a risk level from the Risk Factors tab in Panel 4 as long as the case has not been open for more than 60 days.
- The Override Eligibility button in the Risk Factors tab of Panel 4 appears only for NGB Level Admins and State Level Super Admin. For all other users, the Continue button appears.
- Updates were made to the Army Combat Fitness Test Scorecard to populate when a user wants to export the results of the ACFT. The Soldiers name, gender, unit information, should pass to the form.
- Users now can add/edit/delete a future date for drills scheduled through the RSP Admin blade module

RESOLVED ISSUES

- (Vulcan) In the Panel 4 Routine Monitoring tab, within the Personal Data Verified button, the Home Phone, Work Phone, and Cell Phone fields don't save when edited or saved.
    - This error has been resolved.
- (Vulcan) When creating an LNO ticket from the Panel 3 LNO tab, the comment made when selecting a ticker category is not transferred to the History of Actions grid in the Panel 4 LNO Case section.
    - This error has been resolved and the captured comments pass to the History of Actions section.
- (Vulcan) When editing a closed LNO ticket's resolution the update is not captured in the History of Actions section in Panel 4.
    - This error has been resolved.
- (Vulcan) The case counts of the Sponsorship Tasks Incomplete and Sponsorship Tasks Overdue work buckets in the RSP Warrior Sponsorship folder match when they should be different.
    - This error has been resolved.
- (Vulcan) The case counts of work buckets in the RSP Routine Monitoring work buckets match when they should be different.
    - This error has been resolved.
- (Vulcan) On the production site, the Pending RSP Acknowledgement work bucket throws an error when acknowledging the assignment for all users.
    - This error has been resolved.

- (Vulcan) The Physical Assessment and Height & Weight Assessment sections in Panel 4 are not saving user input. Clicking Results to save information has no effect on the page.
  - This error has been resolved.
- Uploading multiple documents at the same time sometimes failed.
  - This error was resolved by updating the upload mechanism to upload documents sequentially.
- An error causing items in the Document Center blade to display blank panels when clicked on was resolved.
- An error preventing remarks from being made in Panel 3 of a Warrior case was resolved.

Version 10.12.0-Released 2022/08/03

ENHANCEMENTS

- Closed LNO tickets can be edited to change the tickets resolution, terminate the ticket, or add a comment around the ticket while still keeping its status closed.
- (Extension) Depending on their user role, users now have the capability to make actions on cases in the Battalion, Brigade, State, and IPPS-A work buckets.
- (Extension) Users can input a Service Representative/Witness Official's information and pass them over to the Print Addendum/Agreement Form under button 6 of Panel 4.
  - Users will fill out witness information under the button 5 screen.
- Section 5 of Form DA4836 was edited so that "ARNG/AGR" populates ahead of the address line for eligible cases.
- The ability to Add, Edit, and Delete information in the RCT Roster in the Administration blade was added.
- The LNO Edit Ticket Email Distro List was created in the Administration blade. Users can use it to save email addresses to selected states so that those addresses receive email notifications when an LNO ticket is created for, or returned to, that state.

RESOLVED ISSUES

- LNO Resolutions created in the Administration blade were not appearing as available options in the drop-down menu when closing an LNO case.
  - This error has been resolved.

Version 10.11.0-Released 2022/07/06

ENHANCEMENTS

- The Counseling 4856 Form was hidden in the Initiate Sponsorship work bucket. Users no longer need counseling forms so the form was hidden in all Sponsorship work buckets.
- The ability to add a name to the IST Counselor drop-down list was added in Panel 4 of an IST work bucket.
    - An “ADD” button was added above the Counselor drop-down menu for users to add the Counselor’s phone number, extension, AKO ID, and name. Users can also remove a name from the drop-down from the Administration blade in the Command Center.
- The ability for the user to update the Counselor drop-down in the 4th panel of an IST work bucket was added. Users can add available Counselors as they appear in the drop-down option. Added users will need to have their names pass over to the Print Letter form when a counselor is selected.
- A link to the Uniform Distribution inventory was added under the Vulcan RSP section of the Administration blade in the Command Center.
    - The inventory displays the current uniform inventory, by size, for each state.
    - It allows the user to select one of the states and then view the history of PT Uniform transactions.
    - It allows the user to select one of the states and adjust the PT Uniform inventory count, by size, for that state.
- Calendar year 2022 was added to the UMT User Activity report. It drills down into Calendar Year month, then Run Date, with a base report of Application, Calendar Year, Calendar Year Month, Date Accessed, Full Name, email address.

RESOLVED ISSUES

- The Name and Grade of a Soldier were not passing over to the proper fields with the rest of inputted info in the Gaining Unit Counseling Form and Losing Unit Counseling Form 4856.
    - This error has been resolved.
- When an LNO ticket is closed and a resolution is saved successfully, it was not reflected in the Resolutions column in the Vulcan Ticket Search-LNO.
    - This issue has been resolved.

Version 10.10.0-Released 2022/06/09

ENHANCEMENTS

- A Print Addendum/Agreement button was added for each Incentive issued to an extension case. Because bonuses can be stacked, a button is needed for each program (LRP, SRIP, MGIB Kicker).
- The Oath of Extension form (D4836) was modified.
    - Capital X’s were added above “United States Army Reserve”.
- Under button 2 of the Case tab in Panel 4, the user should be able to click Update, select any date,

select either P or W (Pass/Withdraw), click Submit, and the eligible column should reflect a green check mark. Changing the test result drop-down to F (fail) should change the check mark to a red x.

- A child section was added above the 4856 Counseling section in Panel 4 that prompts the user to verify Additional Contact Information in Panel 3.
- Users can edit the Disposition of a Vulcan Soldier. The Disposition Reason drop-down also populates based on the chosen Disposition Category.
- The My Reports blade was created in the Command Center. It contains the My Reports, Private Reports, and Shared Reports folders.

RESOLVED ISSUES

- Uploading a document under button 6 (Issue Documents screen) in Panel 4 created a generic error message. Users can upload PDF files to trigger the transfer case drop-down action.
- An error in the Panel 4 Sponsor Contact section was resolved.
  - The Sponsor Contact section created an error when trying to create a new sponsor contact.
- An error causing Soldier Contacts to save to the wrong section was resolved.
  - The Soldier Contact section and Soldier Contact tab in Panel 4 were saving to the Sponsor Contact section instead.

KNOWN ISSUES

- The RMS Metric Brief report does not open and instead creates an error message.

Version 10.9.0-Released 2022/05/12

ENHANCEMENTS

- The Print Addendum/Agreement button was added to button 6 in the panel 4 Case tab of an Extension/Counseling case next to the Print DA4836 and Upload Document buttons.
- The Enterprise/AKO ID section was changed to a drop-down and the email address now auto - populates.
  - The Enterprise/AKO ID drop-down is found in the LNO User window which opens when adding a new user to the LNO Assignments chart in the Administration blade.
- A section for Training Videos was created in the Resource Center blade of the Command Center.
- The Category Manager, LNO Assignments, and Resolutions links under the Administration blade in panel 1 were role restricted, only to be seen/actioned on by the NGB Admin role and hidden for all other roles.
- The ability to upload multiple files to the Documents tab was added.

- This applies to panel 4 of the AWOL Recovery, Sponsorship, Career Development Counseling, Extension, and Interstate Transfer cases, as well as panels 3 and 4 of a Vulcan RSP case.

RESOLVED ISSUES

- The grid in the Counseling tab in panel 4 of any Extension work bucket previously did not save information. This has been resolved.
- In panel 4 of a case in the Extension/Counseling folder, an error generated when a user clicks the Alert Chain of Command or Transfer buttons was resolved.
  - The error would not allow the user to proceed through the extension process.
- The “Unable to Counsel Reason” section in the Counseling tab of panel 4 was not displaying any information from button 1 of the Case tab, even when the “Unable to Counsel” checkbox was selected and a reason was chosen from the drop-down. This error has been resolved.
- The grid in the Counseling tab in panel 4 of the Initiate Sponsorship work bucket previously did not save information. This has been resolved.
- An error surrounding both the primary and alternate contact information grids in the Family Contact tab of panel 3 which did not allow editing or the addition of new information was resolved.
- The field under Days Until Shop_Color Code was being duplicated and has now been resolved. Only applicable fields show options for the user.
  - Users would see duplicate fields, that while the same, were different tables.
- The POC Last Name field in the Warrior Roster Builder report had an extra space that was deleted.
  - It used to read POC L ast Name.
- An error surrounding the “Failed Transaction Flag” field in the ATRRS Training Roster was resolved.
  - The “Failed Transaction Flag” would throw an error when inserted into the report. It was removed as an option from the left side.

Version 10.8.0-Released 2022/04/4

ENHANCEMENTS

- The APFT Stored Procedures were modified, and updates were made to the requirements of the physical test calculation.
- The ability to assign LNOs to a Training Base was added to the Forms drop-down under the Interstate Transfer work buckets. The form appears in the custom controls for buttons 1, 2, 3, 4, 5, 6 in panel 4.
- IST form DA 4187 was added to the Forms drop-down under the Interstate Transfer work buckets.
- Updates were made to form DA 4836 Oath of Extension found under button 6 in panel 4 of the Extension/Counseling work buckets.
- The latest form version of DA 4836 Oath of Extension is now available.

RESOLVED ISSUES

- An error where check boxes in the Quickship Checklist screen (button 3) in panel 4 of the Sponsorship Tasks Incomplete, Sponsorship Tasks Overdue, and Quick Shipper work buckets would not save was resolved.
- When performing a Vulcan Soldier Search from the Search blade of the Command Center, the Training Phase drop-down displayed code instead of a description of the phase. This error has been resolved.
- In the Soldier Roster of a Vulcan work bucket, the Training Phase column displayed code instead of a description.

KNOWN ISSUES

- The RSP Sponsorship Checklist (button 2) has multiple Qty checkboxes repeating when only one should be present.

Version 10.7.0-Released 2022/03/14

ENHANCEMENTS

- The Period of Extension questions under button 3 in Panel 4 of an Extension work bucket were updated.
- Several updates to form DA4836 under button 6 in Panel 4 of an Extension work bucket were made.
- The Accept Paragraph/Line (Losing State), Complete Gaining State Checklist, and Complete Gaining Unit Checklist action buttons found in the Panel 4 Case Details tab of an Interstate Transfer work bucket were removed.
- The Accept Paragraph/Line (Losing State), Complete Gaining State Checklist, and Complete Gaining Unit Checklist work buckets were removed.
- The Enlisted Affiliation Incentives Request Form and Enlisted Incentives Request Form were added to the Resource Center blade.
- The ARNG SRIP Policy FY22, ARNG SRIP Policy FY22 Memo, and ARNG SRIP Q1 Top 3 State MOS documents were added to the Resource Center blade.
- The Case History tab is grayed out and inaccessible unless there is data present. If data is present the tab is accessible and show a history grid with a Contact button that opens a pop-up window when clicked.
- The Strength Maintenance Program and Summary of Change documents were extensively updated, and the Assignment of Enlisted Personnel document was added to the Resource Center blade.

RESOLVED ISSUES

- An error creating an Extension case using the Soldier Search function was resolved.
- An error creating an IST case using Soldier Search was resolved.
- Errors surrounding the Losing Unit Counseling (4856) and Gaining Unit Counseling (4856) forms in the Interstate Transfer work buckets were resolved.
- An error creating a Sponsorship case using the Soldier Search function was resolved.
- An error creating a Transition Services case using the Soldier Search function was resolved.
- An error with the Returned to LNO work bucket not displaying a work count for search results was resolved.
- An error when selecting the Vulcan Cases tab within the Returned to LNO work bucket was resolved.
- An error with the Disposition Roster reports data display was resolved.
- An error with the RSP Attachment Discrepancy report not drilling down was resolved.
- An error with the Soldier Roster report not drilling down was resolved.
- An error with the Soldier Ship Roster report not drilling down was resolved.
- An error with the Acknowledge RSP Assignment button being unresponsive was resolved.
- An error surrounding several Vulcan reports returning too many results and not filtering was resolved.
- An error with users having blank UIC/Grades in UMT user profiles which was not allowing them to fall into the appropriate user hierarchies was resolved.

Version 10.6.0-Released 2022/02/8

ENHANCEMENTS

- Custom controls were created around the Create LNO Ticket button in the LNO tab.
- Users can create and add new Resolution options in LNO Edit Ticket Options in the Administration blade.
- RSP Site Setup successfully opens in panel 3 from the Administration blade.
- PFA/APFT Assessments successfully opens in panel 3 from the Administration blade.
- Controls were created in the Assume Command blade to assume different commands and roles.
- An updated DA 4836 form has replaced the outdated form in RMS

RESOLVED ISSUES

- An error involving the 4856 Counseling form was resolved.
- An error involving work bucket counts not matching was resolved.
- An error involving the calendar defaulting to January 1900 was resolved.

- An error involving the Document Center not listing properties was resolved.
- An error causing .docx file types to be unsupported in the Document center was resolved.

Version 10.5.0-Released 2022/01/10

ENHANCEMENTS

- Users will see controls dependent on the work bucket sections.
    - The Counseling and Assign Sponsor sections were updated to be shown in the Initiate Sponsorship work bucket.
- Users under the RSP Shipper Management work bucket will have access to a checklist form that is exportable.
- A link to the User Management Tool was added to the Administration blade.

RESOLVED ISSUES

- An error in the LNO Documents tab in the 4th panel of the LNO Module folder was resolved.
- An error when trying to access the RSP Performance Metrics Report was resolved.
- An error tied to the 30-Day Shipper work bucket was resolved.

KNOWN ISSUES

- The subscribe button for Reenlistment Success reports generates an error message.

Version 10.4.0-Released 2021/12/13

ENHANCEMENTS

- A checklist of items for sponsors to complete and upload was added to the sponsorship process.
- A survey for sponsors regarding their onboarding process was added.
- Added ability to create remarks about a Soldier as well as view preexisting remarks.
- Added ability to create remarks about a Soldier as well as view preexisting remarks.
- A comment section was created.

RESOLVED ISSUES

- An error in the 4th panel of the Interstate Transfer work bucket was resolved.

Version 10.3.0-Released 2021/10/16

ENHANCEMENTS

- The Budget and Documents tab were combined into the Budget/Documents tab.
- Ability to verify soldier contact information and complete sponsorship checklist.
- The list of RMS User Roles that can issue incentive Contracts was updated.
- Updated ability to capture Family Contact information.
    - Adding primary and alternate contact information for soldiers.

RESOLVED ISSUES

- The option to select a year in “Date Extension will be Executed” was resolved.
- An error in the Contact Info Section of the 3rd panel of the Routine Monitoring work bucket was resolved.
- A “Days Until Ship” column was added to the 2nd panel of the Routine Monitoring work bucket.
- An error in the Documents Section of the 3rd panel of the Warrior Sponsorship work bucket was resolved.

2 SMMS Overview

The Strength Maintenance Management System (SMMS) is a CAC-authenticated management and reporting tool for the Army National Guard (ARNG) force's readiness and strength at the unclassified level. SMMS is a web-based system with multiple modules and tools that support the Recruiting and Retention Community utilizing a familiar desktop-style user interface. SMMS also currently hosts the G1 Gateway and the Guard Incentive Management Subsystem (GIMS).

2.1 Accessing Retention Management System Extension

Access to the SMMS and RMS User Guide is Common Access Card (CAC) authenticated through EAMS-A.

> **Tip -** For account assistance, please contact the Army Enterprise Service Desk (AESD) at 866-335-ARMY. For application support, please contact the G1 Help Desk at 877-339-5570.

Warning: The SMMS is a DOD website. The security accreditation level of this site is classified as FOUO and below. Do not process, store, or transmit information classified above the accreditation level of this system. DOD web sites may be monitored for all lawful purposes, including ensuring their use is authorized, managing the system, facilitating protection against unauthorized access, and verifying security procedures, survivability, and operational security. Monitoring includes, but is not limited to, active attacks by authorized DOD entities to test or verify the security of this system. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All information, including personal information, placed on or sent over this system may be monitored. Use of this DOD web site, authorized or unauthorized, constitutes consent to monitoring. Unauthorized use of this DOD web site may subject you to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal or other adverse action. Use of this system constitutes consent to monitoring for all lawful purposes.

2.2 Logging on to SMMS

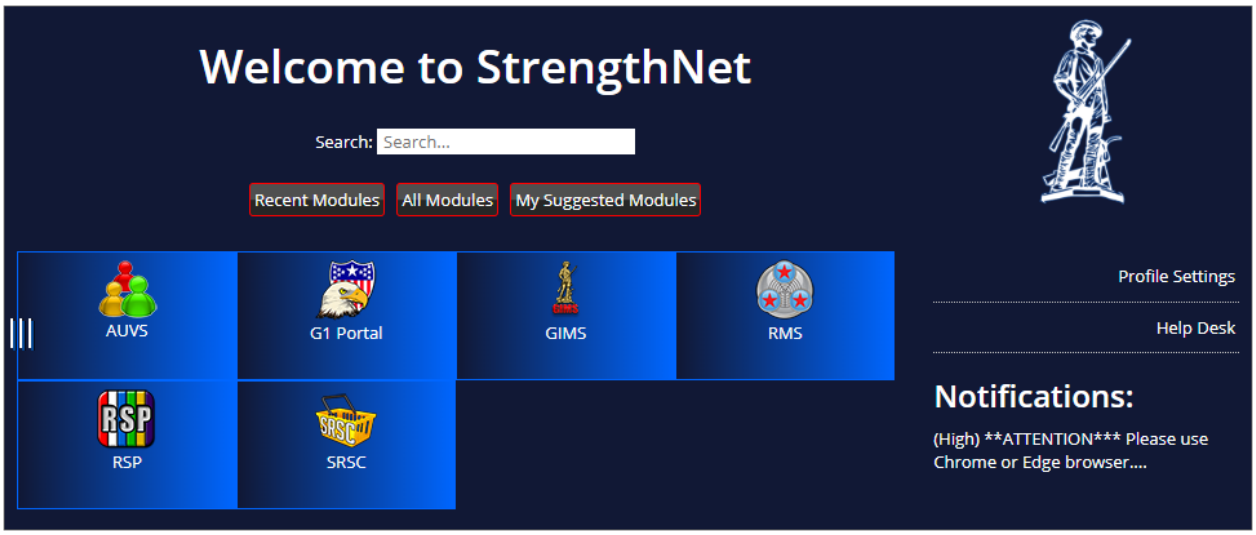
1. In order to access the SMMS, and all of the available products, navigate to **https://smms.ngb.army.mil/v4/RMS/**.
2. Insert CAC into the reader attached to the computer.
3. Select the authentication certificate and enter a valid CAC PIN.
   - The SMMS opens.

> **Note -** Upon first logging into the SMMS, users must read and accept the Acceptable Use Policy.

4. Log on. If there are any active system notices, they appear in a pop-up window.
5. Click **Dismiss** after reviewing the message or click **Remind Me Later** to view the message again upon next logging into the SMMS.

2.3 The StrengthNet Landing Page

Upon logging into SMMS, the StrengthNet Landing Page opens. This page displays links to the most popular products in the SMMS portal.

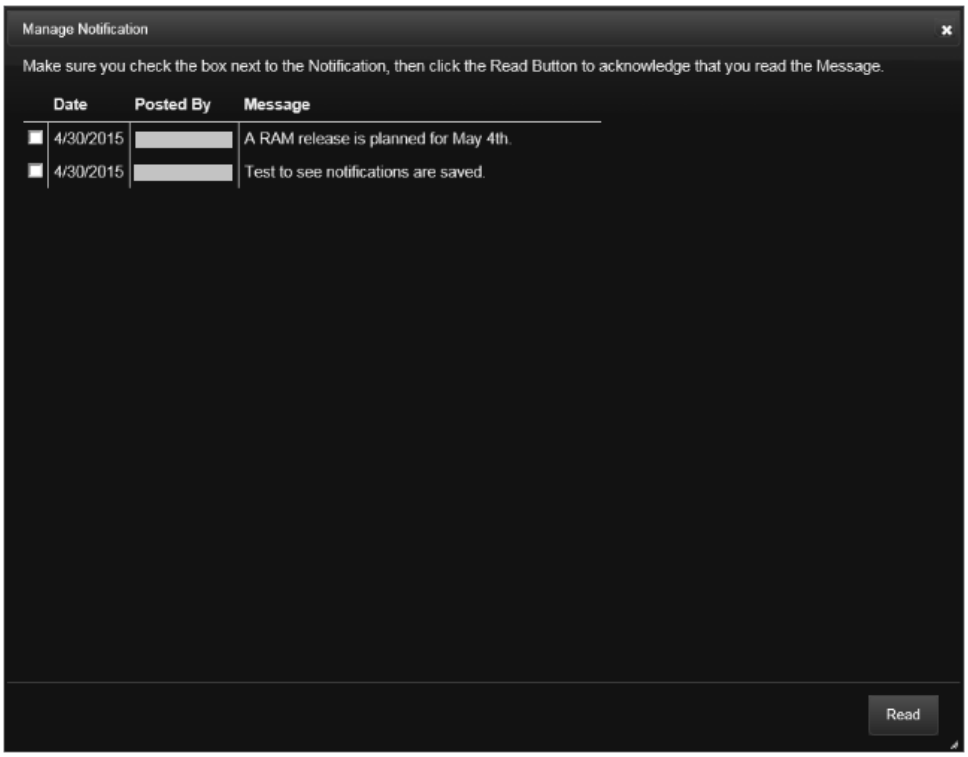


There are three ways to access links on the StrengthNet Landing Page:

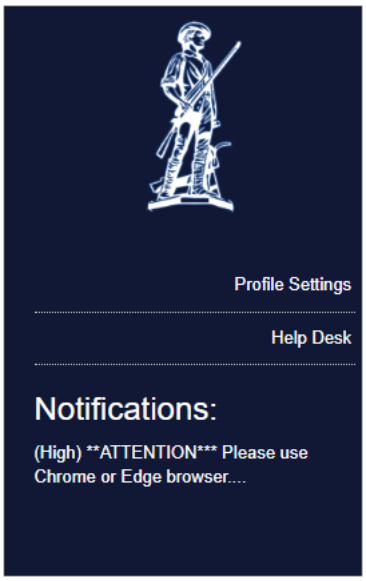
- **Product Boxes:** Clicking the modules in the boxes either opens the module via the webtop, or with some modules, opens the module in the browser window. The *G1 Gateway* product box opens the G1 Gateway website in a separate tab in the browser.
  - Recent Modules: limits the modules displayed to the last ten users have accessed
  - All Modules: default view
  - My Suggested Modules: displays modules matching tags selected in user profile settings
- **Search:** Type the name of a module in the *Search* field. The modules displayed are filtered as users type.
- **Shortcut menu:** Hover the cursor over the icon ||| on the left side of the screen to view a pop-up menu with shortcuts to all the module tiles and options available from the Landing Page.

2.3.1 Message Notification

If any messages require attention, the *Message Notification* window appears when opening the site. Select the check box for each message and click **Read** to acknowledge the message so it won't appear upon next login.

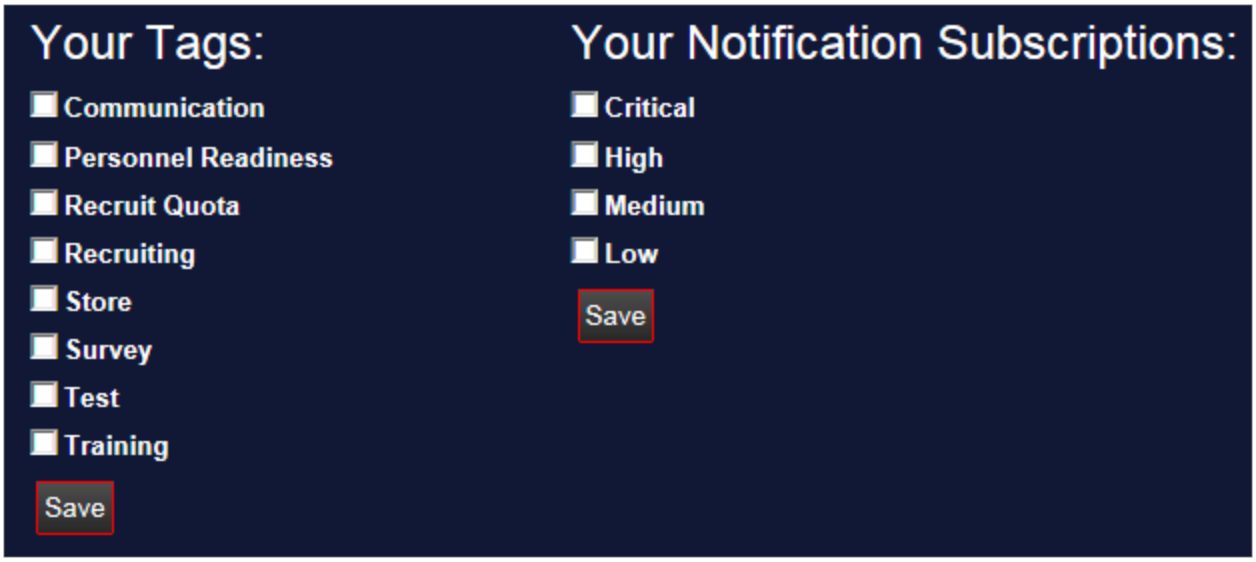


The recent messages from the *Message Notification* window also appear on the right side of the screen for future reference.



2.3.1.1 Profile Settings

The *Profile Settings* page displays tags that can be selected to filter the modules displayed from the *My Suggested Modules* screen or to limit notification subscriptions.



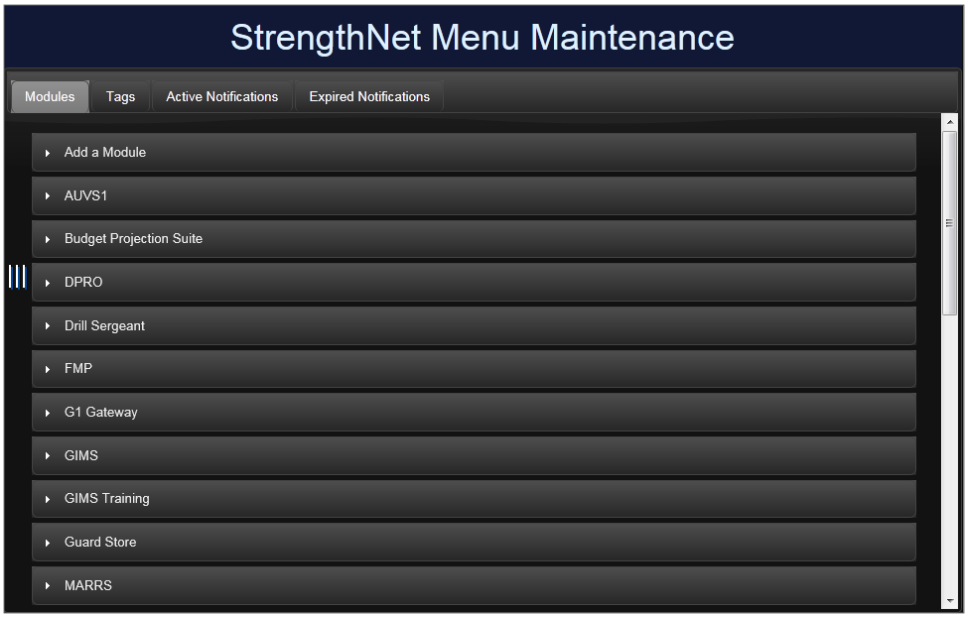
Selecting tags may help users decide which modules are of interest to the user and to their mission. Modules matching selected tags are displayed when the *My Suggested Modules* filter is selected. Tags are maintained by administrators.

2.3.1.2 Help Desk

The Help Desk contact information is available from this screen.

2.3.1.3 Manage Menu

The *Manage Menu* button opens the *StrengthNet Menu Maintenance* page to the *Modules* tab. Only admin users have access to the Manage Menu.

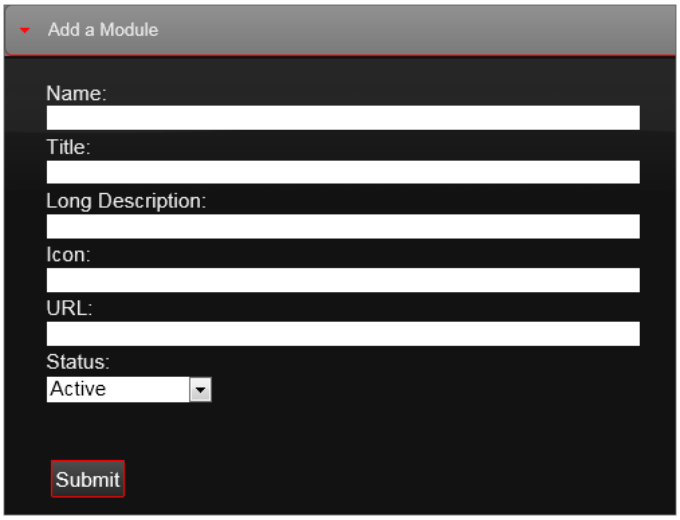


Manage Menu options include:

- *Modules* tab
- *Tags* tab
- *Active Notifications* tab
- *Expired Notifications* tab
- *User Management* tab

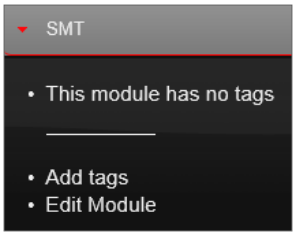
Modules Tab

Click **Add a Module** at the top of the list to create a new module.



Note - The contents of the *Long Description* fields are displayed as a tooltip once the module has been added, as seen in the screenshot below.

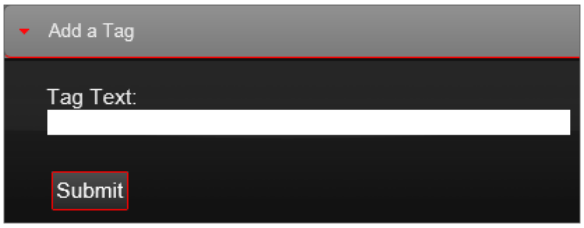
To edit an existing module, select that module from the list. The example below illustrates the options to add tags to or edit the SMT module.



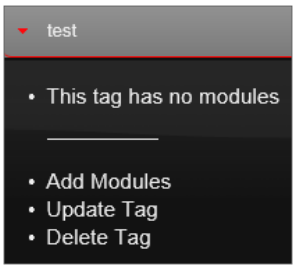
Click **Add tags** to view a list of existing tags. Select the checkbox for any tag(s) required to apply to the module.

Tags tab

Click **Add a Tag** to create a new tag.

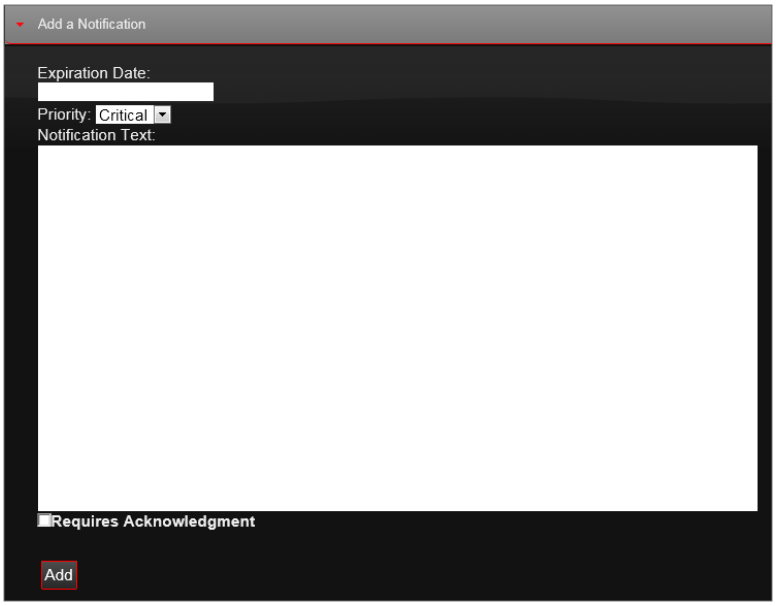


To edit an existing tag, select that tag from the list. The example below illustrates the options to edit a tag labeled "test."



Active Notifications tab

To add a notification:

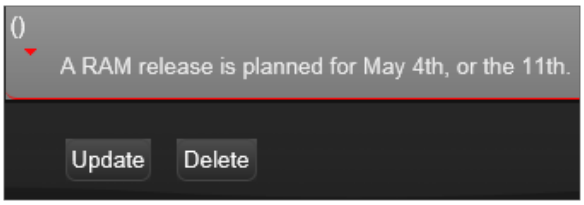


1. Set the expiration date.
2. Set the priority to Critical, High, Medium, or Low.
3. Enter notification text.

4. Optionally, select the *Requires Notification* check box to flag the message as high priority. This requires the user to select the message and click *Read* in the *Message Notification* window that appears after logging in.
5. Click **Add**.

Expired Notifications tab

In this section users can select an expired notification to update or delete.

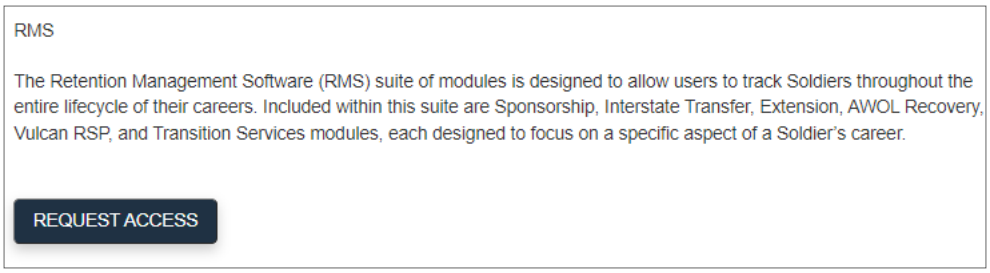


User Management tab

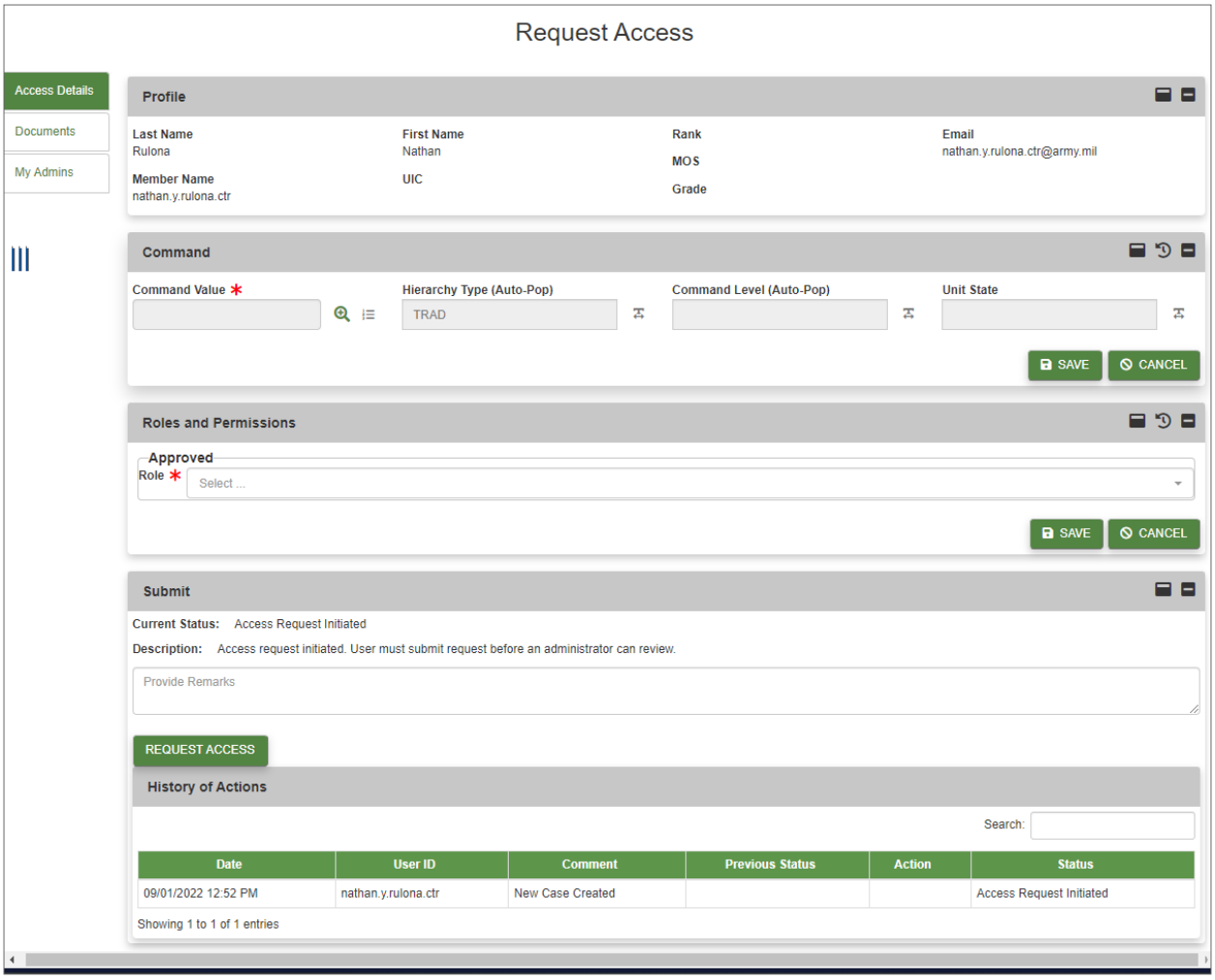
To navigate back to the *Manage Menu* screen click **Home.**

2.4 Requesting Access on StrengthNet

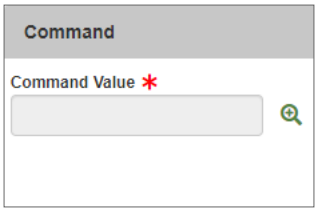
1. On the StrengthNet Landing Page, click the application you wish to request access to.
   - A page displaying a Request Access link appears.



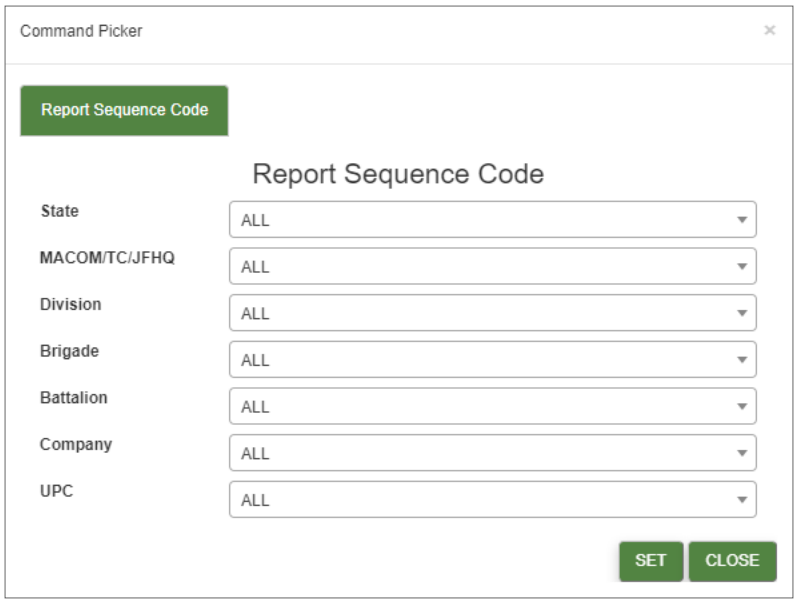
2. Your profile appears in the *Request Access* screen.



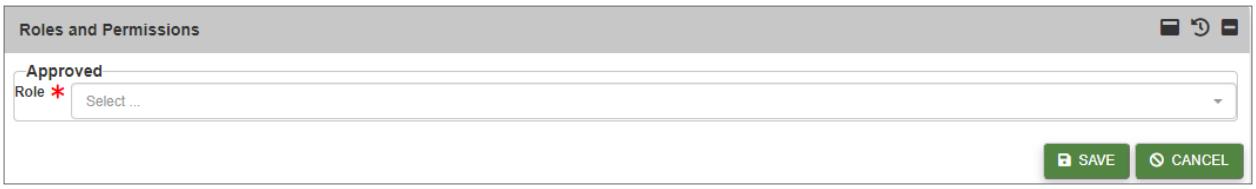
3. First, click the magnifying glass next to the *Command Value* field.



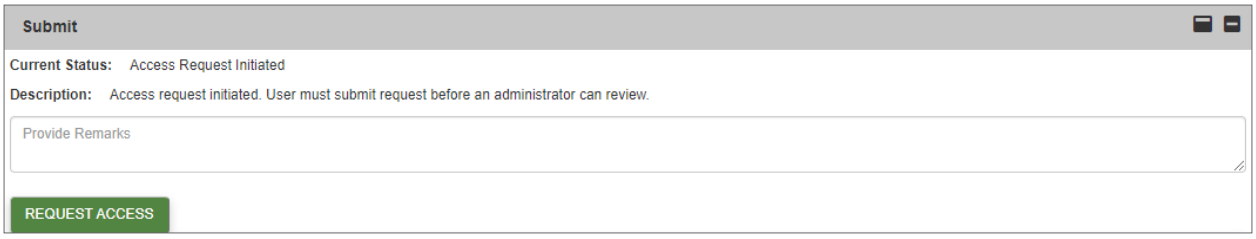
- The *Command Picker* window opens. Select the appropriate options from the drop-down menus. Click **SET**.



4. The *Hierarchy Type* and *Command Level* fields will automatically populate.
   - Click **SAVE**.
5. In the *Roles and Permissions* section, select the appropriate role from the *Role* drop-down menu.



   - Click **SAVE**.
6. Once all required information has been filled in, click **REQUEST ACCESS** in the *Submit* section.

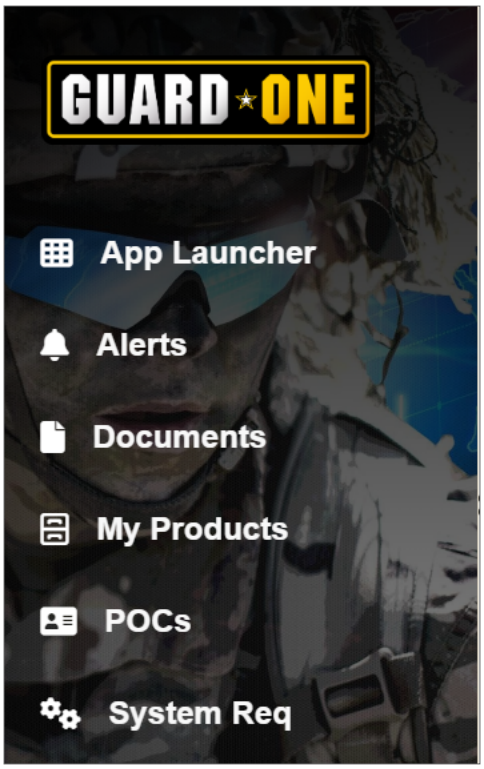


   - Click **YES** in the confirmation window.
7. Your request is submitted for Administrator approval.

Note - For revalidation requests, download and fill out a new SAAR form and repeat all previous steps.

2.4.1 Finding Access Request Form

1. On the Guard One Landing Page, click **Documents**.



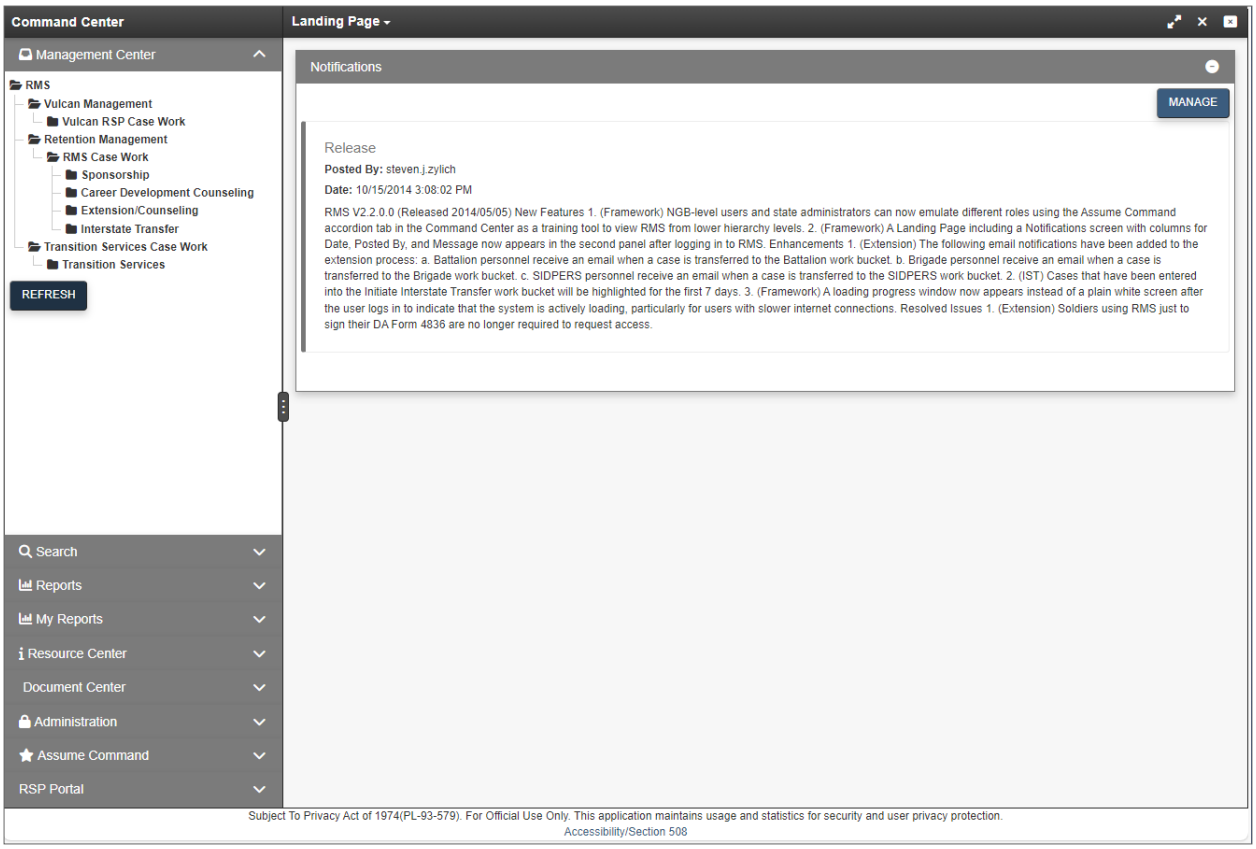
2. Click **SAAR Form**.

3. Download and fill out SAAR Form. Upload the completed form to StrengthNet.

3 Retention Management Software Overview

3.1 Opening RMS Modules

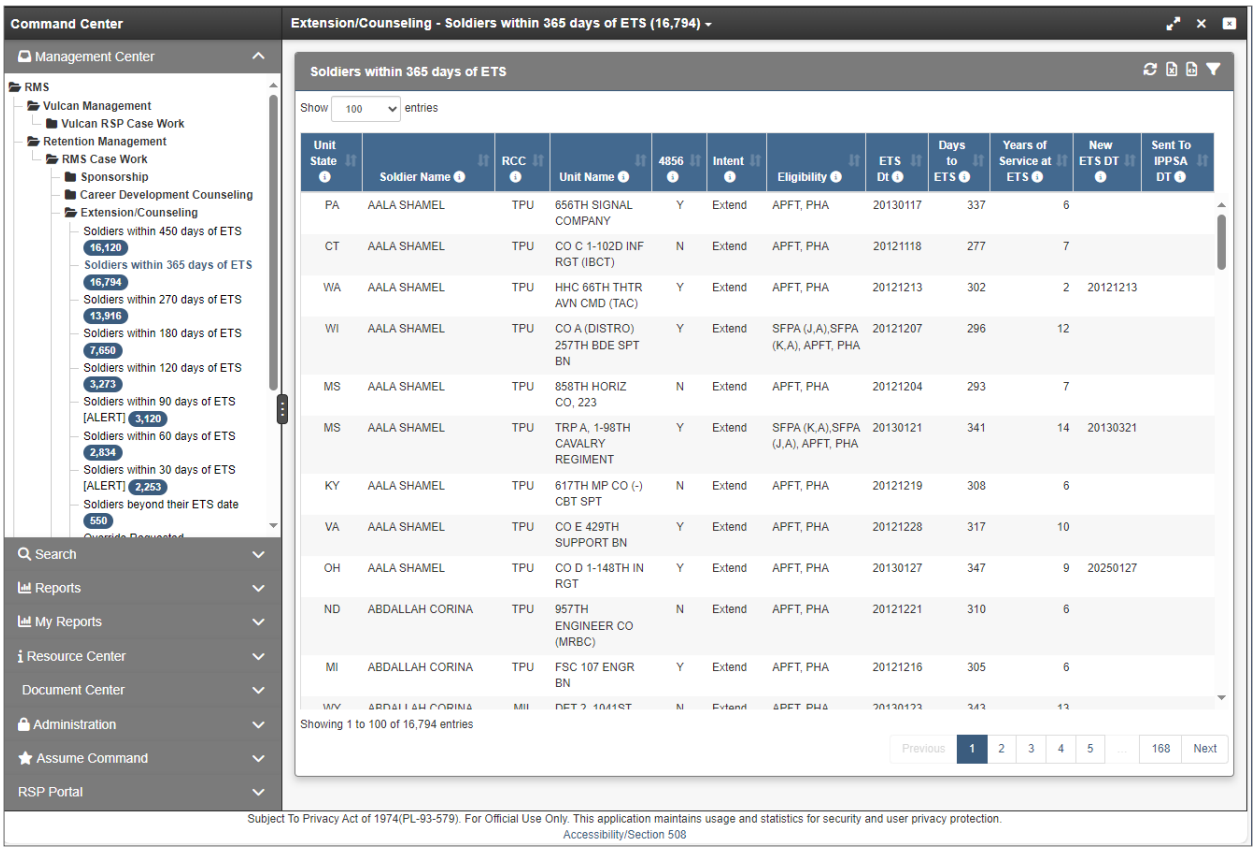
From the RMS Landing Page, you can open RMS modules from the *Management Center* blade in the Command Center.



3.2 Introduction to the RMS User Guide Interface

The RMS User Guide user interface allows you to accomplish your work from four panels, each of which performs a different function.

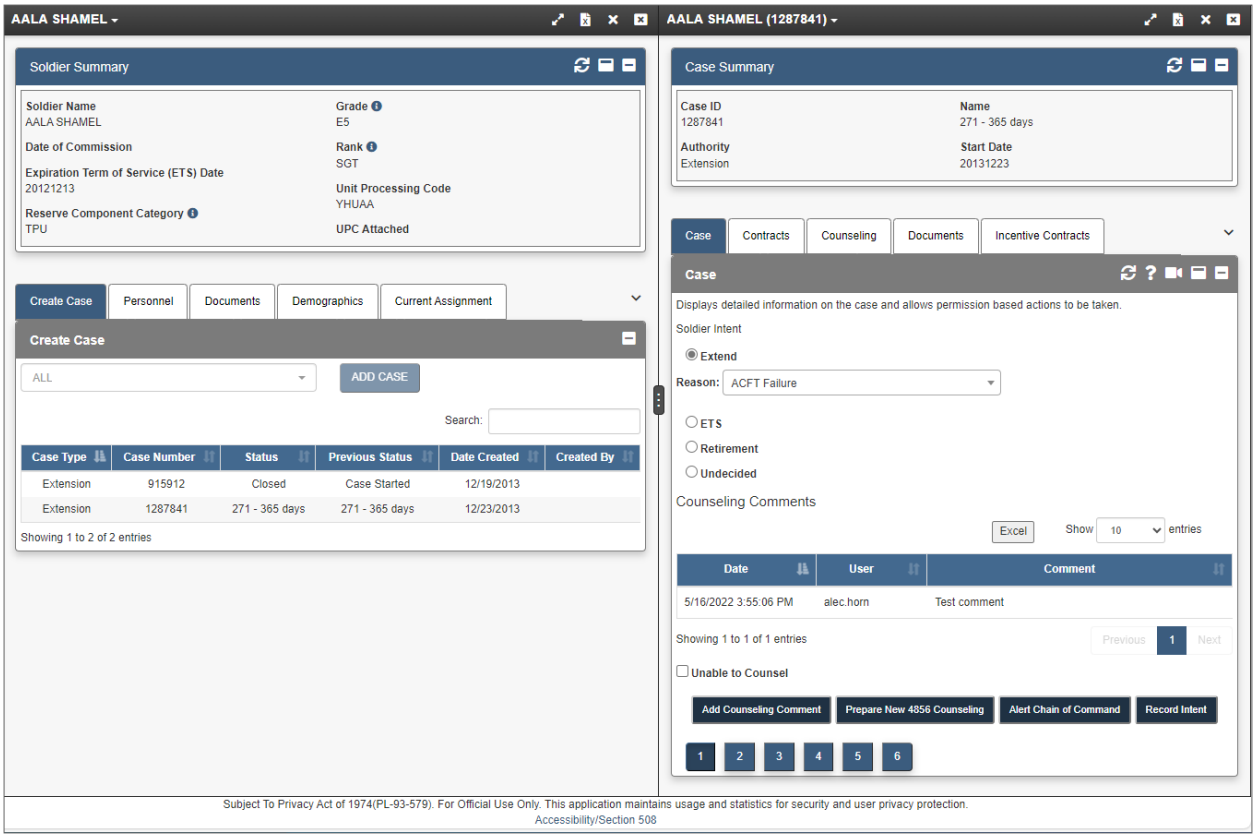
> **Note -** Each panel can be collapsed or expanded at any time by clicking the black bar at the top of each panel.



Unit State	Soldier Name	RCC	Unit Name	4856	Intent	Eligibility	ETS Dt	Days to ETS	Years of Service at ETS	New ETS DT	Sent To IPPSA DT
PA	AALA SHAMEL	TPU	656TH SIGNAL COMPANY	Y	Extend	APFT, PHA	20130117	337	6		
CT	AALA SHAMEL	TPU	CO C 1-102D INF RGT (IBCT)	N	Extend	APFT, PHA	20121118	277	7		
WA	AALA SHAMEL	TPU	HHC 66TH THTR AVN CMD (TAC)	Y	Extend	APFT, PHA	20121213	302	2	20121213	
WI	AALA SHAMEL	TPU	CO A (DISTRO) 257TH BDE SPT BN	Y	Extend	SFPA (J,A),SFPA (K,A), APFT, PHA	20121207	296	12		
MS	AALA SHAMEL	TPU	858TH HORIZ CO, 223	N	Extend	APFT, PHA	20121204	293	7		
MS	AALA SHAMEL	TPU	TRP A, 1-98TH CAVALRY REGIMENT	Y	Extend	SFPA (K,A),SFPA (J,A), APFT, PHA	20130121	341	14	20130321	
KY	AALA SHAMEL	TPU	617TH MP CO (-) CBT SPT	N	Extend	APFT, PHA	20121219	308	6		
VA	AALA SHAMEL	TPU	CO E 429TH SUPPORT BN	Y	Extend	APFT, PHA	20121228	317	10		
OH	AALA SHAMEL	TPU	CO D 1-148TH IN RGT	Y	Extend	APFT, PHA	20130127	347	9	20250127	
ND	ABDALLAH CORINA	TPU	957TH ENGINEER CO (MRBC)	N	Extend	APFT, PHA	20121221	310	6		
MI	ABDALLAH CORINA	TPU	FSC 107 ENGR BN	Y	Extend	APFT, PHA	20121216	305	6		

From left to right, panels 1 and 2 contain:

1. **Command Center:** see **Command Center** on page 63.
2. **Soldier Roster:** see **Soldier Roster** on page 67.



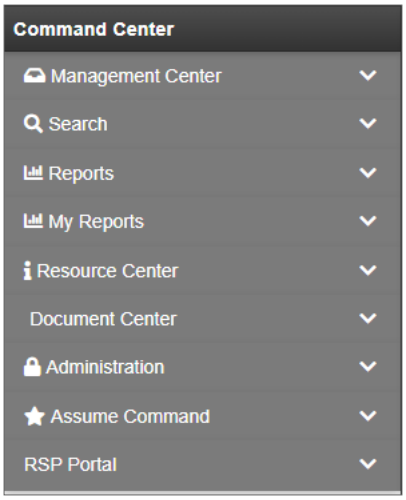
Panels 3 and 4 contain:

3. **Soldier Details:** see **Soldier Details** on page 69.
4. **Case Details:** see **Case Details** on page 79.

> **Note -** The contents of Panel 4 depend on what application module you are using.

3.2.1 Command Center

The Command Center is where you access your job duties within RMS User Guide.



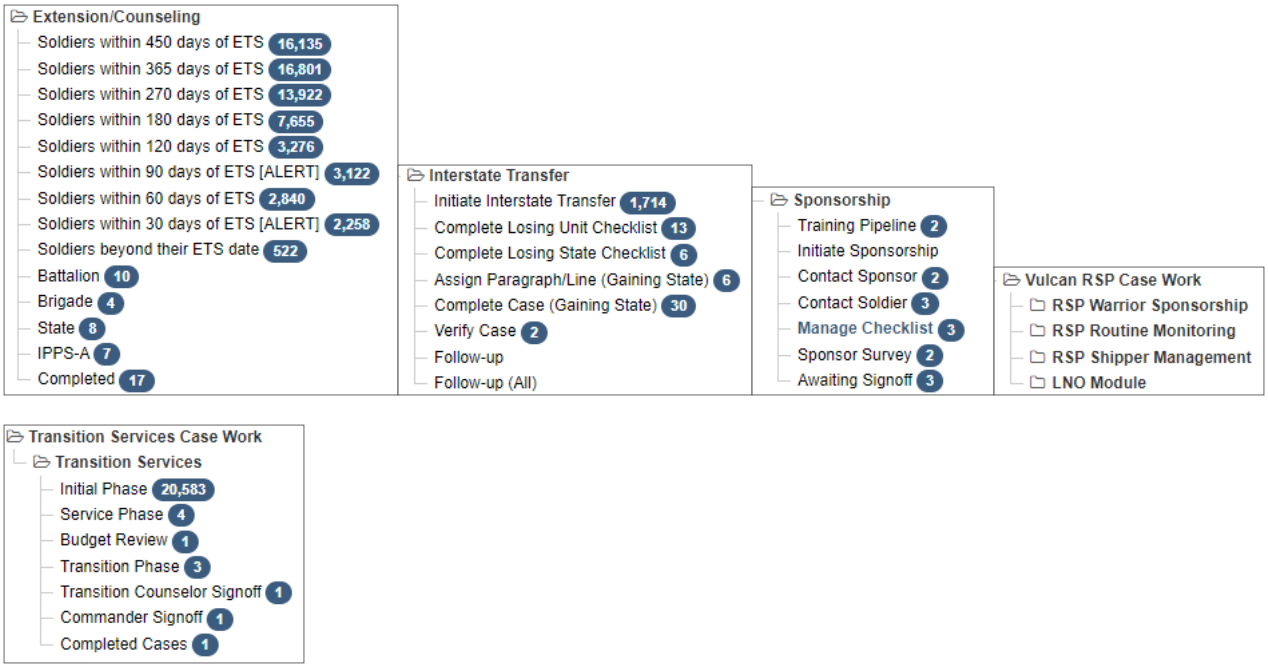
The Command Center is composed of several different blades:

- **Management Center:** See **Management Center** below.
- **Search:** See **Search** on page 200.
- **Reports:** See **Reports** on page 208. No reports are available for Extension at this time.
- **My Reports:** Contains private and shared reports. See **My Reports** on page 236
- **Resource Center:** Contains documents, user guides, and training videos. See **Resource Center** on page 240
- **Document Center:** Contains any policy guidance or other documents uploaded by module administrators for users of the module to view.
- **Administration:** See **Administration** on page 241.
- **Assume Command:** See **Assume Command** on page 265.
- **RSP Portal:** Search for RSP training resources. See **RSP Portal** on page 268.

3.2.1.1 Management Center

The *Management Center*, located in the first panel on the far left of the screen, organizes cases in permission-based work buckets, or groups of similar cases. Work buckets display a list of Soldiers or LNO tickets needing a particular action that you may need to perform. You can only view work buckets, and the cases within, if you have the appropriate role and permission. The number in parentheses beside each work bucket is the number of cases that you can either view or edit.

Below are the work buckets that appear in the *Extension/Counseling*, *Interstate Transfer*, *Sponsorship*, *Vulcan RSP Case Work*, and *Transition Services Case Work* folders.



Note - Depending on your role, you may be able to view work buckets and cases that you are unable to edit.

Work Buckets

The work buckets within the RMS application include:

Work Bucket	Case
Training Pipeline	A Sponsorship case is created and added to this work bucket when a Service Member completes training and is considered Battle Handoff ready. A sponsor should be assigned and initial contact made with the Service Member for cases in this work bucket.
Initiate Sponsorship	A Sponsorship case is created and added to this work bucket when a Soldier changes units. A sponsor should be assigned and initial contact made with the Soldier for cases in this work bucket.
Contact Sponsorship	Cases are moved to this work bucket after the assigned sponsor makes initial contact with the sponsor.
Contact Soldier	Cases are moved to this work bucket after initial contact is made with the Soldier.
Manage Checklist	Cases in this work bucket have progressed through the initial steps of assigning a sponsor, the sponsor making initial contact, and the Soldier making initial contact. The sponsor completes and uploads a checklist of items at this stage.
Sponsor Survey	Cases in this work bucket require completion of the Sponsor Survey.

Work Bucket	Case
Awaiting Signoff	Cases in this work bucket require the unit administrator's final sign-off before the case can be marked as completed and closed.
Soldiers within 450 days of ETS	The Soldier has no more than 450 days until the scheduled ETS Date.
Soldiers within 365 days of ETS	The Soldier has no more than 365 days until the scheduled ETS Date.
Soldiers within 270 days of ETS	The Soldier has no more than 270 days until the scheduled ETS Date.
Soldiers within 180 days of ETS	The Soldier has no more than 180 days until the scheduled ETS Date.
Soldiers within 120 days of ETS	The Soldier has no more than 120 days until the scheduled ETS Date.
Soldiers within 90 days of ETS	The Soldier has no more than 90 days until the scheduled ETS Date.
Soldiers within 60 days of ETS	The Soldier has no more than 60 days until the scheduled ETS Date.
Soldiers within 30 days of ETS	The Soldier has no more than 30 days until the scheduled ETS Date.
Soldiers beyond their ETS date	The Soldier has passed their scheduled ETS Date.
Battalion	This work bucket is populated when a reviewer transfers the Soldier's record to the Battalion level, so that they may review and add/confirm any DA4836 or Bonus Addendum information as well as transfer the case to a higher level.
Brigade	This work bucket is populated when a reviewer transfers the Soldier's record to the Brigade level, so that they may review and add/confirm any DA4836 or Bonus Addendum information as well as transfer the case to a higher level.
State	This work bucket is populated when a reviewer transfers the Soldier's record to the State level, so that they may review and add/confirm any DA4836 or Bonus Addendum information as well as transfer the case to the IPPS-A level.
IPPS-A	This work bucket is populated when a reviewer transfers the Soldier's record to the IPPS-A level. Soldiers in this bucket are waiting to be entered into IPPS-A.
Completed	This work bucket contains all the cases that require no more action. The cases in this work bucket are viewable.
Initiate Interstate	The losing unit and Soldier need to initiate the transfer.

Work Bucket	Case
Transfer	
Complete Losing Unit Checklist	The losing unit needs to complete its checklist to progress the case.
Complete Losing State Checklist	The losing state needs to complete its checklist to progress the case.
Assign Paragraph/Line (Gaining State)	The gaining state must assign a vacancy for the Soldier, and may request Split Training if the selected position is currently filled but is expected to become vacant soon.
Accept Paragraph/Line (Losing State)	The losing state may either accept the assigned position, end Split Training, or reject Split Training.
Complete Gaining State Checklist	The gaining state needs to complete its checklist to progress the case.
Complete Gaining Unit Checklist	The gaining unit needs to complete its checklist to progress the case.
Complete Case (Gaining State)	The gaining state must certify that the Soldier has been provided Orders, POCs, and a unit sponsor.
Verify Case	The IST Administration must verify the completion of the case.
Follow Up	Incomplete cases with a follow-up date equal to or before today's date appear in this work bucket so that the IST Help Desk can review the case.
Follow-up (All)	All open cases with a follow-up date are located in this work bucket.
Awaiting Attachment to RSP	These cases are new RSP Soldiers who have not yet been attached to an RSP Site (which must be accomplished in IPPS-A).
Pending RSP Acknowledgment	These cases are Soldiers who have just been attached to the RSP Site. Users from that RSP Site must acknowledge that they have a new RSP Soldier.
Sponsorship Tasks Incomplete	These cases are Soldiers for whom the initial RSP Sponsorship tasks are not yet complete.
Sponsorship Tasks Overdue	Cases are copied from the *Sponsorship Tasks Incomplete* work bucket to this work bucket if it has been 45 days since the Soldier enlisted; the RSP Sponsorship Checklist can be completed from either work bucket.
Quick Shipper	These cases are shipping to training 45 days or less after the Soldier's enlistment date.
In-Progress	These cases monitor the completion of tasks performed during monthly drills conducted at the RSP Site.
Overdue	Cases are copied from the *In-Progress* work bucket to this work bucket if the case hasn't been updated within 30 days of a drill.
At Training	These cases are on hold while the Soldier is away at training.

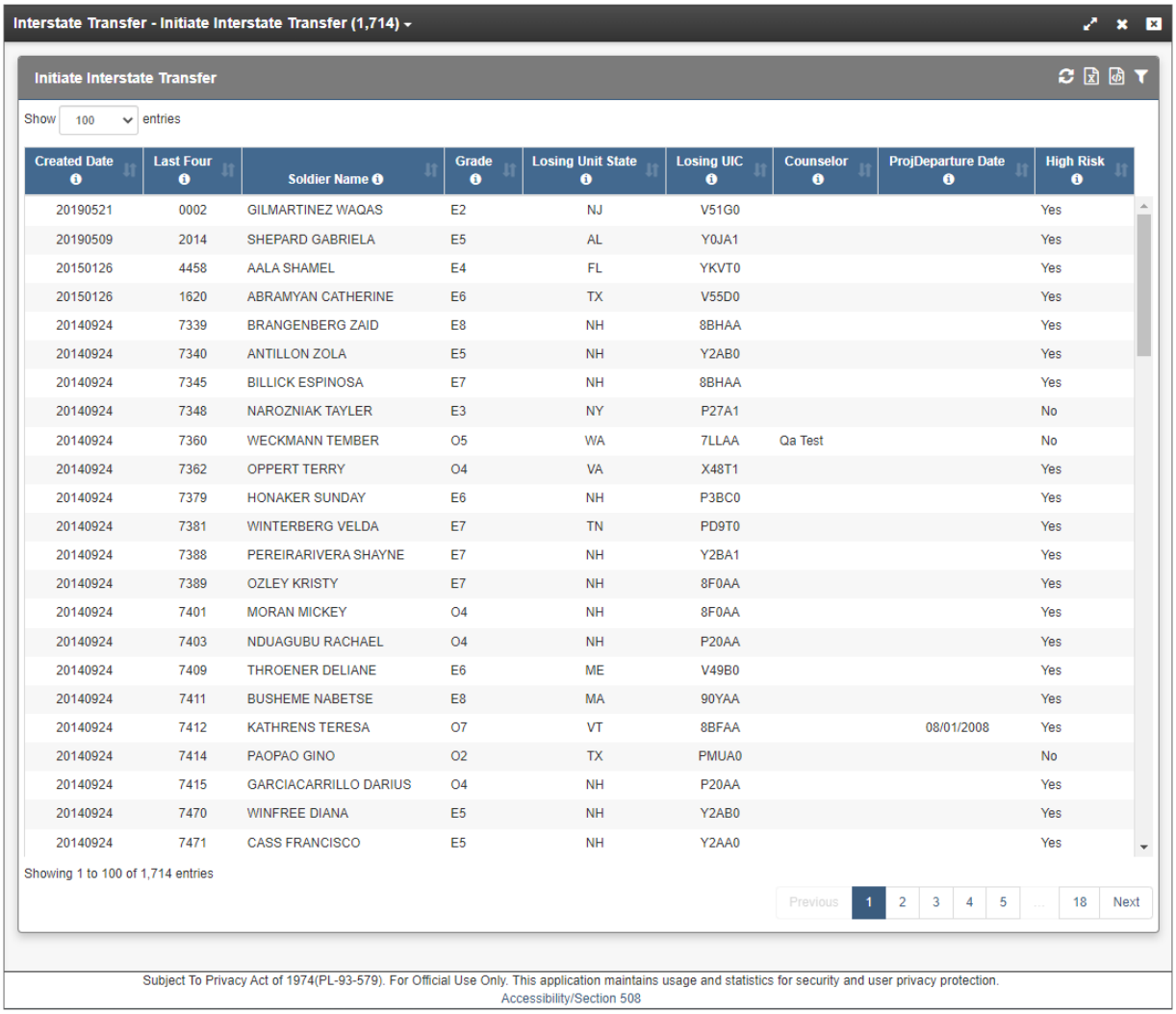
Work Bucket	Case
90-Day Shipper	These cases are shipping to training within 90 days.
60-Day Shipper	These cases are shipping to training within 60 days.
30-Day Shipper	These cases are shipping to training within 30 days.
New	These cases contain new LNO tickets.
Returned to LNO (All)	These cases have been returned to the LNO by the state with a response to the ticket.
Returned to State	These cases have been returned to the state by the LNO for further review or document requests.
Initial Phase	This work bucket is populated when a Soldier's enlistment is confirmed. The case remains in this work bucket until completion of basic training.
Service Phase	This work bucket is populated when a Soldier is assigned to a unit, or when the unit leader clicks the *Capture Service Phase Data* button from the Initial Phase.
Budget Review	This work bucket is populated after the Soldier's budget is uploaded and the unit leader clicks the *Budget Review* button in the fourth panel.
Transition Phase	This work bucket is populated when a Soldier is within 12 months of ETS or has between 24 months and 20 years of experience in the National Guard. The unit leader can also click the *Capture Transition Phase Data* button from the Service Phase to send the Soldier into the Transition Phase.
Transition Counselor Signoff	This work bucket is populated after all checklist items are completed and the unit leader clicks the *Transition Counselor Sign off* button in the fourth panel.

3.2.2 Soldier Roster

The Soldier Roster is the second panel from the left, which lists a selected work bucket's contents.

The list includes Soldiers who have cases in that work bucket and general information about those Soldiers, such as Soldier name, UPC, ETS date, Grade, Current and Destination UIC, Social Security Number (SSN), etc.

You can select any Soldier from this list to view detailed information about that Soldier. After clicking a Soldier, the third and fourth panels populate, and the first and second panels automatically collapse.

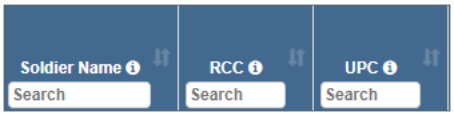


Created Date	Last Four	Soldier Name	Grade	Losing Unit State	Losing UIC	Counselor	ProjDeparture Date	High Risk
20190521	0002	GILMARTINEZ WAQAS	E2	NJ	V51G0			Yes
20190509	2014	SHEPARD GABRIELA	E5	AL	Y0JA1			Yes
20150126	4458	AALA SHAMEL	E4	FL	YKVT0			Yes
20150126	1620	ABRAMYAN CATHERINE	E6	TX	V55D0			Yes
20140924	7339	BRANGENBERG ZAID	E8	NH	8BHAA			Yes
20140924	7340	ANTILLON ZOLA	E5	NH	Y2AB0			Yes
20140924	7345	BILLICK ESPINOSA	E7	NH	8BHAA			Yes
20140924	7348	NAROZNIAK TAYLER	E3	NY	P27A1			No
20140924	7360	WECKMANN TEMBER	O5	WA	7LLAA	Qa Test		No
20140924	7362	OPPERT TERRY	O4	VA	X48T1			Yes
20140924	7379	HONAKER SUNDAY	E6	NH	P3BC0			Yes
20140924	7381	WINTERBERG VELDA	E7	TN	PD9T0			Yes
20140924	7388	PEREIRARIVERA SHAYNE	E7	NH	Y2BA1			Yes
20140924	7389	OZLEY KRISTY	E7	NH	8F0AA			Yes
20140924	7401	MORAN MICKEY	O4	NH	8F0AA			Yes
20140924	7403	NDUAGUBU RACHAEL	O4	NH	P20AA			Yes
20140924	7409	THROENER DELIANE	E6	ME	V49B0			Yes
20140924	7411	BUSHEME NABETSE	E8	MA	90YAA			Yes
20140924	7412	KATHRENS TERESA	O7	VT	8BFAA		08/01/2008	Yes
20140924	7414	PAOPAO GINO	O2	TX	PMUA0			No
20140924	7415	GARCIACARRILLO DARIUS	O4	NH	P20AA			Yes
20140924	7470	WINFREE DIANA	E5	NH	Y2AB0			Yes
20140924	7471	CASS FRANCISCO	E5	NH	Y2AA0			Yes

3.2.2.1 Soldier Roster Tools

There are several ways to customize the Soldier Roster (second) panel.

- Filter the results by clicking on the **Show/Hide Filters** icon at the top of the panel. Enter text above a column in the *Search* field. The results are filtered as you type.



- View tool-tips by clicking the information icon in any column heading.

- Options to refresh the screen, show/hide filters, clear filters, export to CSV, or export to Excel are available in the tool panel above the roster.

> **Tip -** See the **Glossary of Icons** on page 199 for specific descriptions.

3.2.3 Soldier Details

Soldier Details, located in the third panel, includes information about the specific Soldier you selected, including contact history, personnel data, recruit information, programs and awards, active duty tours, and other data available within RMS.

The Soldier Details panel contains the following tabs for Extension, Sponsorship, IST, and Transition Service cases:

Tab	Function
Create Case	Add different case types to a Soldier's file.
Documents	Includes all uploaded documents associated with the Soldier. (See **Documents** on page 186 for more information.)
Personnel	Displays basic personnel information for the Soldier, such as AFQT Score, Date of Commission, DODID, Duty Position Qualified, etc.
Demographics	Displays demographic information on the Soldier, such as Age, Gender, and Marital Status.
Vulcan Cases	Lists any existing Vulcan cases; double-clicking a case opens it in the fourth panel.
Recruit Info	Provides information related to the Soldier's enlistment, such as Enlistment Effective Date, MOS, and Assigned UIC.
ATRRS	Shows data from the Army Training Requirements and Resources System for the Soldier's Army classes, including the Class Number and Title, Reservation Status Code, Course Dates, etc.
LNO	Create LNO tickets and display LNO case details.
LNO Tickets	Displays details about current LNO tickets for the Soldier. (See **LNO Module** on page 154 for more information.)
Medical	Displays information on the medical status of the Soldier, including deployment limitations and other attributes of medical readiness.

Tab	Function
Civilian Employment	Displays information associated with a Soldier's civilian employment, as reported by DMDC.
RCMS Field Updates	Displays information on key data element changes tracked in RCMS, such as changes in rank, pay grade, and Military Education Code.
Current Assignment	Displays information on the Soldier's current assignment such as Line, Paragraph, and Position Title.
Active Duty Tours	Displays a summary of the Soldier's ARNG Active Duty Tours.
ATRRS History	Displays information about the Soldier's Army Training Requirements and Resources System (ATRRS) Reservation History (Class Number, Course Number, Completion Status, and Start and End Dates).
Medical Status	Displays information on the medical status of the Soldier, including deployment limitations and other attributes of medical readiness.
SFPA	Displays the most recent status of each Suspension of Favorable Personnel Actions (SFPA) flag associated with a Soldier and tracked by his or her current state.
Line Scores	Displays the line scores for the Soldier which are derived from individual ASVAB subtest scores.
Reenlist/Ext Activity	Displays information on any recent reenlistment or extension activities, if applicable.
Drill Attendance (U)	Displays information on any Drill Attendance codes of "U" (Unsatisfactory Attendance).
SIB Transactions	Displays information on any IPPS-A transactions submitted for the Soldier, if applicable.
Soldier Remarks	Enables you to add remarks about a Soldier and view existing remarks with the date and author. (See **Soldier Remarks (Vulcan Cases Only)** on page 73 for more information.)
Programs and Awards	Enables you to select any enlistment programs, ship programs, Basic Training awards, and Advanced Individual Training awards that apply to the Soldier. (See **Programs and Awards (Vulcan Cases Only)** on page 73 for more information.)
All Remarks	This tab displays all remarks made around a Soldier's case.
Soldier Status	Enables you to view existing enlistment issues; select new enlistment or other issues that apply to the Soldier; view system-generated drill-attendance, shipper, or basic requirement issues; select whether the Soldier is a Pending Loss, Projected Loss, or BHO Ready; and view any comments users have saved about existing issues. (See **Soldier Status (Vulcan Cases Only)** on page 74 for more information.)
Disposition	Displays the Soldier's current Warrior Disposition ID and Reason ID and enables you to make changes. (See **Disposition (Vulcan Cases Only)** on page 78 for more information.)
Contact Info	Allows you to view the Soldier's existing contact information and to edit or add contact information. Contact information for RSP Warrior Sponsorship cases entered in the fourth-panel *Family Contact* tab is also listed here.
Phase Input	Enables you to update the Soldier's STRM training phase. (See **Phase Input (Vul-**

Tab	Function
	can Cases Only) on page 79.)
Family Contact	Displays a Soldier's primary and alternate family contact information.
Additional Contact Info	Allows you to view existing contact information and edit or add information.
Contact History	Tracks all contact made with the Soldier. (See **Viewing and Adding Contact History** on the next page for more information.)

3.2.3.1 Vulcan Case Tabs

The following tabs appear in Panel 3 of a Vulcan case.

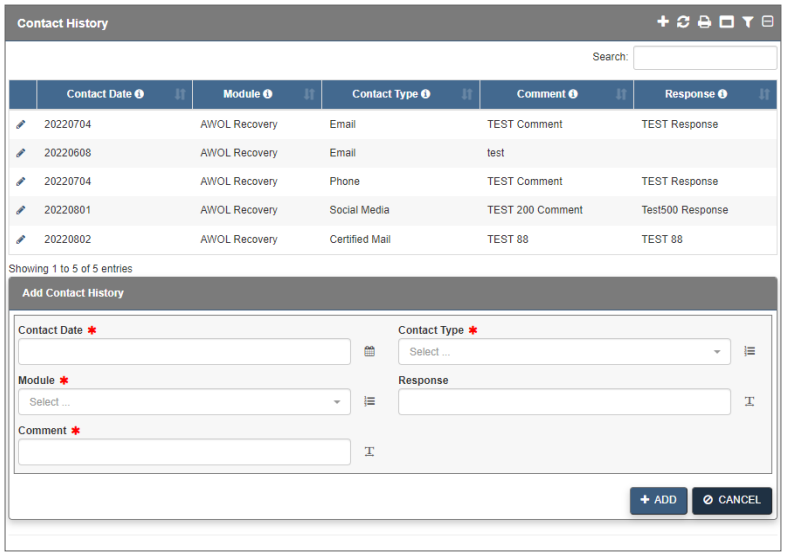
Tabs	Function
Vulcan Cases	Lists any existing Vulcan cases; double-clicking a case opens it in the fourth panel.
Demographics	Displays demographic information on the Soldier, such as Age, Gender, and Marital Status.
Personnel	Displays basic personnel information for the Soldier, such as AFQT Score, Date of Commission, Duty Position Qualified, etc.
Recruit Info	Provides information related to the Soldier's enlistment, such as Enlistment Effective Date, MOS, and Assigned UIC.
ATRRS	Shows data from the Army Training Requirements and Resources System for the Soldier's Army classes, including the Class Number and Title, Reservation Status Code, Course Dates, etc.
LNO Tickets	Displays details about current LNO tickets for the Soldier. (See **LNO Module** on page 154 for more information.)
LNO	Create LNO tickets and display LNO case details.
Medical	Displays information on the medical status of the Soldier, including deployment limitations and other attributes of medical readiness.
Civilian Employment	Displays information associated with a Soldier's civilian employment, as reported by DMDC.
RCMS Field Updates	Displays information on key data element changes tracked in RCMS, such as changes in rank, pay grade, and Military Education Code.
SIB Transactions	Displays information on any IPPS-A transactions submitted for the Soldier, if applicable.
Soldier Remarks	Enables you to add remarks about a Soldier and view existing remarks with the date and author. (See **Soldier Remarks (Vulcan Cases Only)** on page 73 for more information.)
Programs and Awards	Enables you to select any enlistment programs, ship programs, Basic Training awards, and Advanced Individual Training awards that apply to the Soldier. (See **Programs and Awards (Vulcan Cases Only)** on page 73 for more information.)

Tabs	Function
All Remarks	This tab displays all remarks made around a Soldier's case.
Documents	Includes all uploaded documents associated with the Soldier. (See **Documents** on page 186 for more information.)
Soldier Status	Enables you to view existing enlistment issues; select new enlistment or other issues that apply to the Soldier; view system-generated drill-attendance, shipper, or basic requirement issues; select whether the Soldier is a Pending Loss, Projected Loss, or BHO Ready; and view any comments users have saved about existing issues. (See **Soldier Status (Vulcan Cases Only)** on page 74 for more information.)
Disposition	Displays the Soldier's current Warrior Disposition ID and Reason ID and enables you to make changes. (See **Disposition (Vulcan Cases Only)** on page 78 for more information.)
Contact Info	Allows you to view the Soldier's existing contact information and to edit or add contact information. Contact information for RSP Warrior Sponsorship cases entered in the fourth-panel *Family Contact* tab is also listed here.
Phase Input	Enables you to update the Soldier's STRM training phase. (See **Phase Input (Vulcan Cases Only)** on page 79.)
Family Contact	Displays a Soldier's primary and alternate family contact information.

3.2.3.2 Viewing and Adding Contact History

The third panel *Contact History* tab displays a record of all of the instances of contact with the Soldier.

1. Click **Contact History**.
   - The *Contact History* tab opens.



2. To add a new contact record, fill in the fields and drop-down lists.

3. Click **+ADD**.
   - The contact is added to the *Contact History* tab.

3.2.3.3 Soldier Remarks (Vulcan Cases Only)

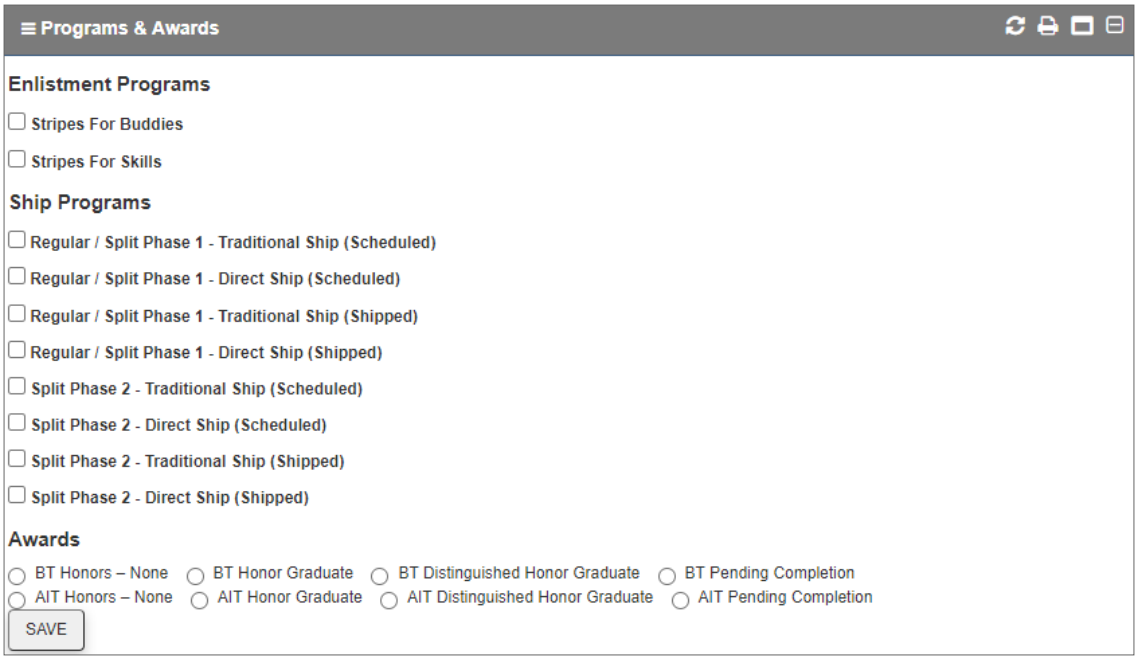
The third panel *Soldier Remarks* tab enables you to add remarks about a Soldier and view existing remarks, along with the date and author.

1. Choose an ID and Case from the drop downs.
2. Enter remarks in the *Remarks* field.
3. Click **ADD REMARKS**.
   - Your remark appears in the Soldier Remarks table with the date and your username.

Remarks	Created By	Created Date
test	alec.horn	01/14/2022 01:36 PM

3.2.3.4 Programs and Awards (Vulcan Cases Only)

The third panel *Programs & Awards* tab enables you to select any enlistment programs, ship programs, Basic Training awards, and Advanced Individual Training awards that apply to the Soldier.



1. Select each check box next to the program that applies in the *Enlistment Programs* and *Ship Programs* sections.
2. Select the Soldier's correct award status.
3. Click **SAVE**.
   - A confirmation box appears.

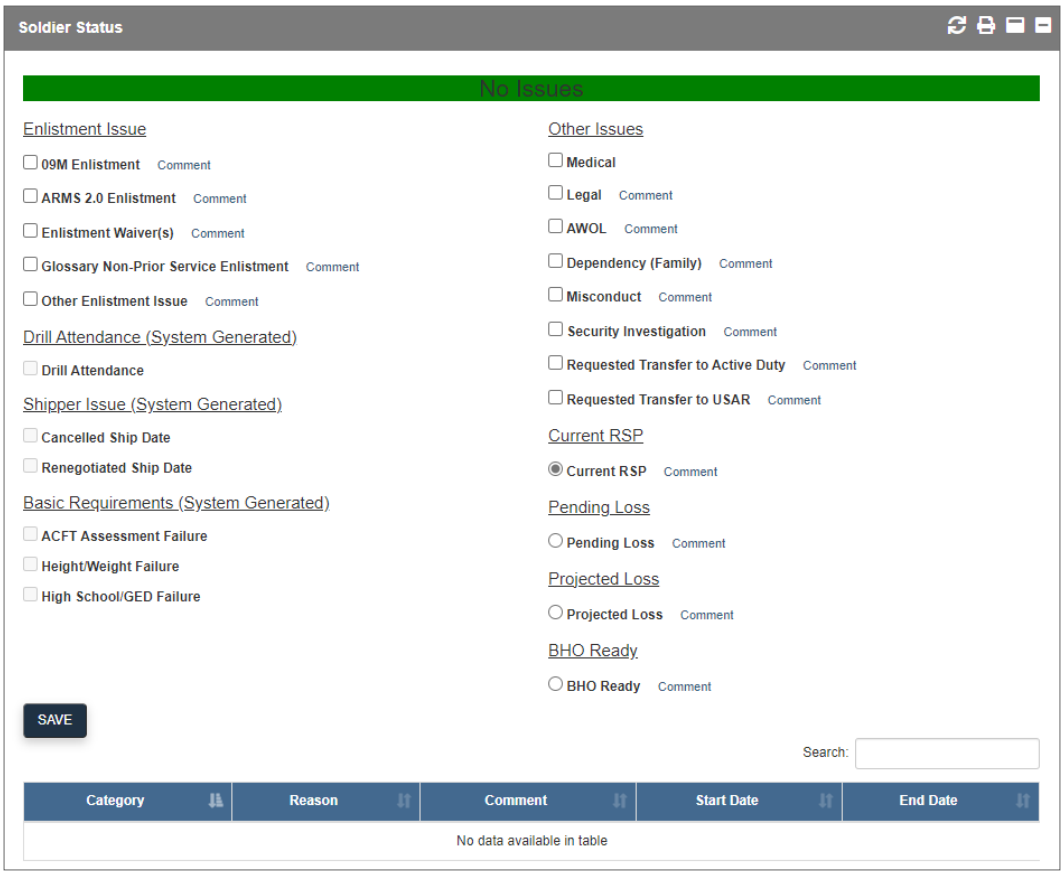
3.2.3.5 Soldier Status (Vulcan Cases Only)

The Soldier Status tool provides a way of indicating a Soldier's overall status in training. It is not a tool to track the performance of the RSP unit, rather is a means of identifying Soldiers who have issues that may indicate a risk of not successfully completing training, and who may therefore warrant added monitoring. Risk factors can be attached to a Soldier, either by the user (User Input) or automatically by Vulcan (System Generated).

The Soldier Status tool is available from the *Soldier Status* tab in the third panel. From this tab you can view existing and add new risk factors affecting the Soldier's status; view system-generated drill-attendance, shipper, or basic requirement issues; select whether the Soldier is a Pending Loss, Projected Loss, or BHO Ready; and view any comments users have saved about existing issues.

System-generated issue factors are shown as unavailable check boxes. At the top of the page the current Soldier Status is clearly displayed. After changes are saved, the Soldier Status is updated to show the Soldier's new overall status. The Soldier Status and corresponding color code are also updated in the Case

Roster (second) panel's *Issue Status* column if applicable.



Multiple issue factors can be checked at the same time. However, only one of the manual statuses—Current RSP, Pending Loss, Projected Loss, and BHO Ready—can be selected at a time. If the Soldier is scheduled for Battle Handoff (BHO), to be assigned to a permanent unit from the RSP, *BHO Ready* should be selected. If you select *BHO Ready*, you must enter the date (within the next 90 days) that the transfer is scheduled to occur.

> **Note -** The *Medical* check box encompasses pregnancy and drug and alcohol issues. The *Medical* check box does not allow comments in order to comply with HIPAA regulations.

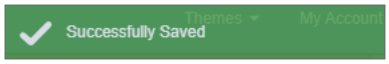
To add issue factors:

1. Select the check box(es) of any enlistment or other issues that apply to the Soldier.
   a. Optionally, click **Comment** beside the selected issue.
      - A comments box for the issue appears.

> **Note -** Comments can be saved for each selected Issue or for the Pending Loss, Projected Loss, or BHO Ready input option buttons.

   b. Enter comments in the *Issue Comments* field.
   c. Click **OK**.
      - A confirmation box appears.

   d. Click **SAVE**.
2. Select **Current RSP**, **Pending Loss**, **Projected Loss**, or **BHO Ready**.
3. Click **SAVE**.
   - A confirmation box appears.



4. The issue(s) and any entered comments appear in the table, and the banner at the top of the screen changes color and displays the Soldier's status.

Soldier Status meanings

The Soldier Status describes the Soldier's likelihood of completing training successfully.

Issue Status	Indicator	Meaning
BHO Ready	BHO Ready	A Soldier who has completed training and a date has been scheduled for the Battle Handoff (BHO) from RSP to permanent unit of assignment.
No Issues	No Issues	A Soldier for whom no significant issues exist–the Soldier does not have Issues and is not a Pending Loss nor a Projected Loss.
Issue	Issue	A Soldier who has at least one issue, and therefore may have an increased risk of not successfully completing training.

Issue Status	Indicator	Meaning
Pending Loss	Pending Loss	A Soldier who has been determined by the appropriate authority to no longer be qualified to become MOS qualified AND a Request for Discharge has been submitted through channels.
Projected Loss	Projected Loss	A Soldier who has an Order for Discharge published but has not been dropped from the state IPPS-A database.

Factors that determine a Soldier's status as *Issue* are categorized in the following tables.

User Input Issues:

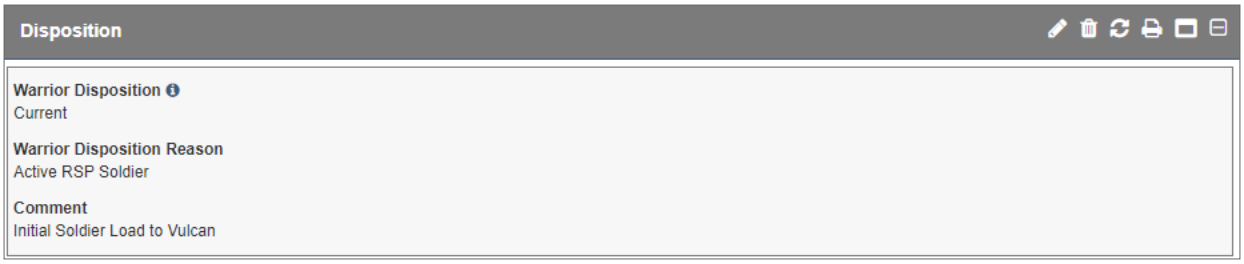
Issue Category	Factor
Enlistment Issue	Enlistment Waiver(s)
	Glossary Non-Prior Service Enlistment
	GED+ Enlistment
	Other Enlistment Issues
Other Issues	Medical
	Legal
	AWOL
	Dependency (Family)
	Misconduct
	Security Investigation
	Requested Transfer to Active Duty
	Requested Transfer to USAR

System Generated Issues:

Issue Category	Factor	Meaning
Drill Attendance	Drill Attendance	Generated when the Soldier has missed monthly drills and appears on the DSRO report RSP Active Drilling Status as Issue. Once the Soldier drops off of this DSRO report, the issue flag will be cleared.
Shipper Issue	Canceled Ship Date	Generated when a Soldier's ship reservation is canceled in REQUEST. Once the Soldier is ship-confirmed, the issue flag is cleared.
	Renegotiated Ship Date	Generated when a Soldier's ship reservation is renegotiated (only adverse renegotiations are considered here–it uses the same set of rules that are used by the BT Scheduled Ship Rate report in DSRO).
Basic Requirements	ACFT/PT Assessment Failure	Generated when failing ACFT or PT Assessment scores are saved in Vulcan. The next passing ACFT or PT Assessment entry clears this issue flag.
	Height/Weight Failure	Generated when failing height/weight data is saved in Vulcan. The next passing height/weight entry clears this issue flag.
	High School/GED Failure	Generated when user input indicates the Soldier has failed to graduate from High School/GED. A subsequent entry indicating successful completion of High School/GED clears this issue flag.

3.2.3.6 Disposition (Vulcan Cases Only)

The panel 3 *Disposition* tab displays the Soldier's current Warrior Disposition ID and Reason ID and enables you to make changes. Editing the Soldier's Disposition closes the RSP case.

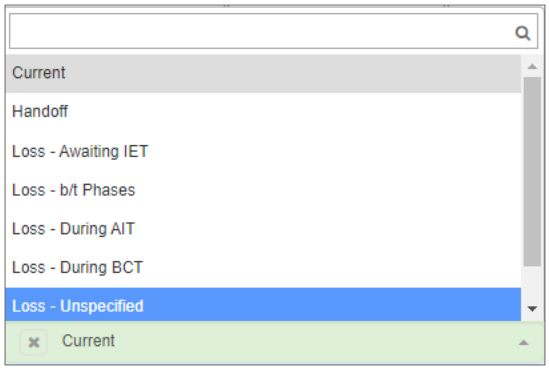


Note - The default Warrior Disposition ID is *Current* and the default Warrior Disposition Reason ID is *Active RSP Soldier*.

Edit a Soldier's Disposition

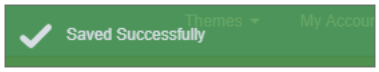
1. Click the **Edit** icon in the gray bar.
   - The *Disposition* tab is refreshed to display editing options.

2. Click the **Warrior Disposition ID** drop-down menu.
3. Select a new *Warrior Disposition ID* from the options.
   - The *Warrior Disposition Reason ID* drop-down menu populates with options applicable to the selected Warrior Disposition ID.



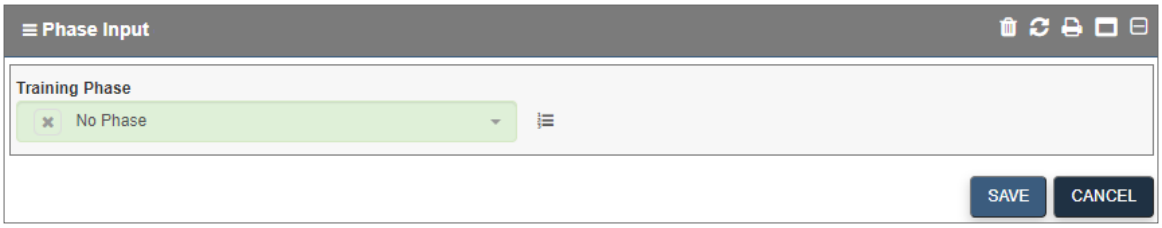
4. Select a **Warrior Disposition Reason**.

5. Optionally, enter a comment in the *Comment* field.
6. Click **SAVE**.
   - A confirmation box appears.



3.2.3.7 Phase Input (Vulcan Cases Only)

The third panel *Phase Input* tab enables you to update the Soldier's STRM training phase.



To change the Soldier's training phase:

1. Expand the *Training Phase* drop-down list and select a phase. For more information about each phase, see **STRM Course Completion Phases** on page 143.
2. Click **SAVE**.
   - A *Success* box appears.

3.2.4 Case Details

The fourth panel, *Case Details*, contains all information pertaining to a Soldier's selected Case.

The *Case Details* panel contains the following tabs:

Tab	Function
Case Details	Displays detailed information on the case and allows permission based actions to be taken.
Contracts	Displays contract information.
Risk Factors	Displays all risk factors for the case and allows new risk factors to be added.
Comments	Displays case comments and allows new comments to be added.
Case Actions	Displays the different actions that can be taken during the case.
Counseling	Displays a list of all Soldier counseling (DA4856) that has been done

Tab	Function
	and allows a new counseling form to be created. See **Counseling** on page 188.
RSP Sponsorship	Verify Soldier's contact information and complete checklist of RSP Sponsorship steps. See **RSP Warrior Sponsorship** on page 121.
Budget/Documents	Displays information on the documents already uploaded for the case and allows users to upload additional documents relating to the case. See **Documents** on page 186.
Action History	History of all actions performed on this case.
Incentive Contracts	Displays information for all incentive and benefit Contracts by Control Number. See **Incentive Contracts** on page 190.
Case Action History	Displays information on the history of actions taken on the case. See **Case History** on page 187. See **Action History** on page 195.
Question History	Displays information on the history off questions related to the case.
Case Remarks	Displays remarks related to the case.
Soldier Contact	History of Soldier contact.
Intent History	Displays all changes in intent for the case. See **Intent History** on page 190.

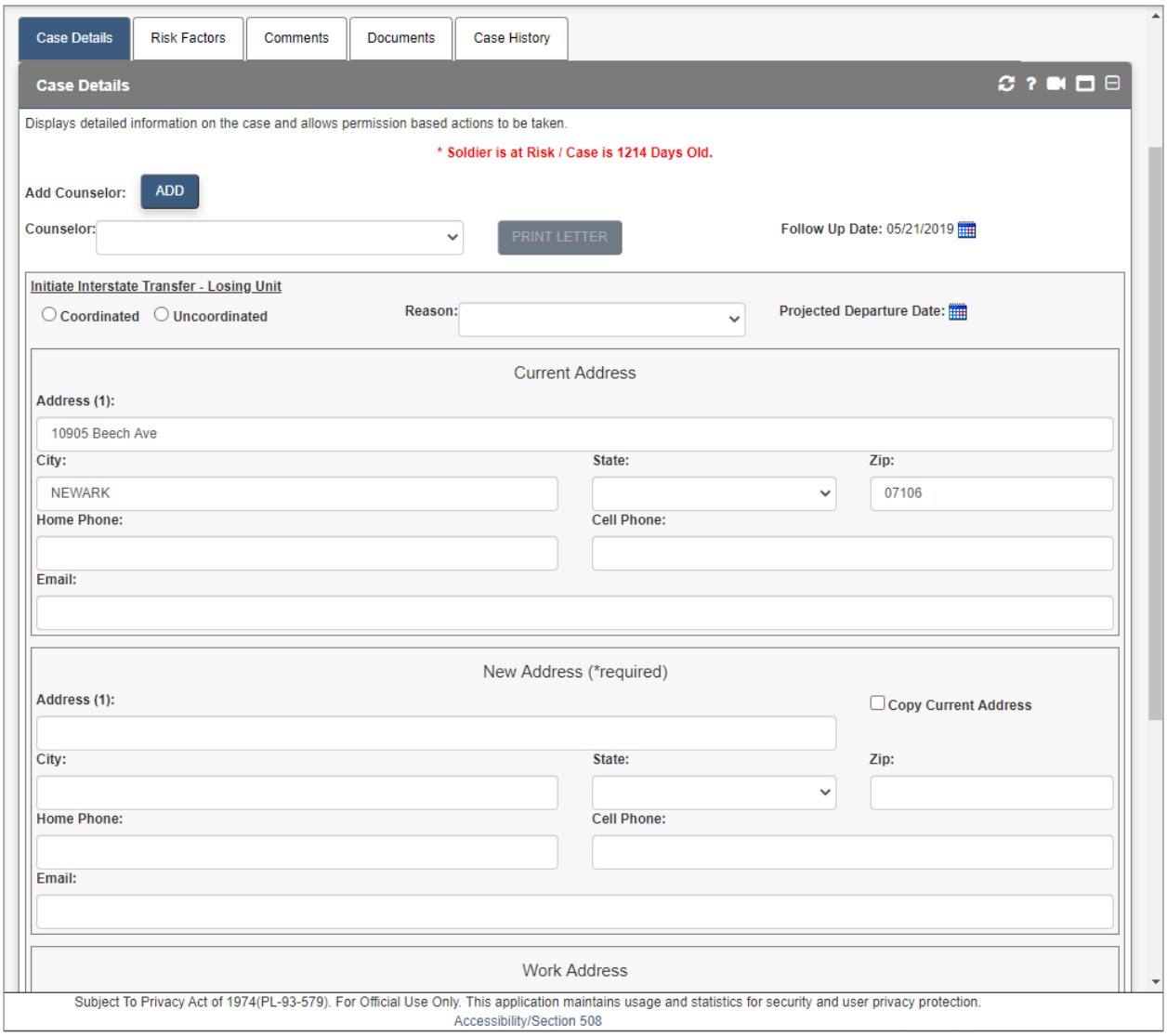
4 RMS Modules

This guide provides an overview of the different modules housed within the application. Click a link to be taken to that section of the guide.

- **Interstate Transfer Module** on the next page
- **Sponsorship** on page 97
- **Extension** on page 106
- **Vulcan RSP** on page 121
- **Transition Services Module** on page 171

5 Interstate Transfer Module

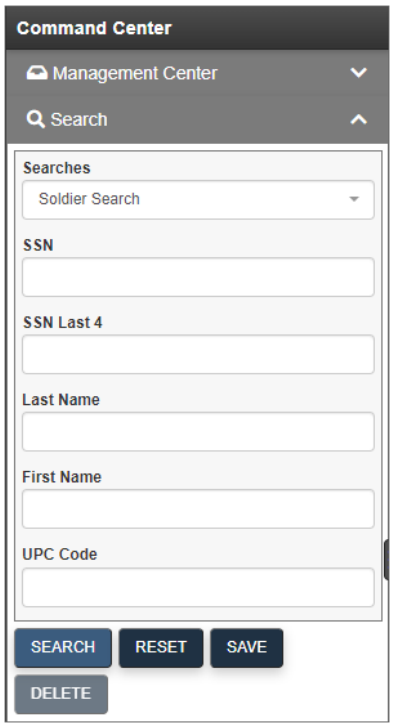
The Interstate Transfer (IST) module facilitates communication between all of the parties involved in the 9-step process. This section describes the work done in the *Case Details*, or fourth panel.



Note - Navigating through the *Case Details* tab can be accomplished by clicking the numbers at the bottom of the screen, which allow you to jump to any page within the Case Summary for the Soldier.

5.1 Create a new Interstate Transfer

1. Click the **Search** tab within the Command Center panel.
   - The *Search* screen appears.



2. Enter information into any of the available fields—*SSN*, *SSN Last 4*, *Last Name*, or *First Name*.
3. Click **Search**.

- The second panel displays a list of Soldiers matching your search criteria.

Soldier Search: []

Search Results ARNG Current Strength

Show 100 entries

Last Four	First Name	Last Name	Unit State	UPC	UPC Attached
6939	KRISTIANA	COREAMEJIA	NH	8BHAA	
6941	CHASITY	KING	CO	P2YAA	
6944	FIGUEROA	BELLOMY	NY	PR7C1	
6945	SHAMEKA	YAVA	TX	X8SAA	
6946	ANGELO	REINDOLLAR	CT	Y3XAB	
6948	ERA	PRIMUS	CO	Y28A1	
6950	KIMYATTA	BROCIOUS	WY	8C2AA	
6951	LIZANDRO	FRANCOROSA	NH	8ZLAA	
6953	WINSTON	VAGAIA	NH	V49C0	
6954	DENNIS	ALDRETE	NH	78TAA	
6959	ROBIN	FESMIRE	NH	8BHAA	
6960	GRACIELA	PADULLA	FL	YKVC0	
6961	ALIRASHEED	BIN	NH	QJ7AA	
6962	ENIOLA	ZAHEER	MA	PFST0	
6963	MELISSA	EVERTS	MN	8AEA2	
6964	QUADRI	KANTENSETER	TX	X8SAA	
6965	ZACHARY	KOBLITZ	NH	P3BT0	
6967	AKHNATON	HENNINGS	NH	Y2AA0	
6968	AGO	JUNCO	NH	Y3KAA	
6970	MAWULI	FERDINAND	ME	Y2TAA	
6972	CHERI	SHAUGER	NH	Y2BAA	
6973	OCTAVIA	GIDEO	WI	PK8T0	

Showing 1 to 100 of 345,839 entries

Previous 1 2 3 4 5 ... 3459 Next

Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.
Accessibility/Section 508

4. Click the name of the Soldier requesting an IST.
   - The *Soldier Details* panel opens for the selected Soldier with the *Create Case* tab selected.

Create Case | Documents | Personnel | Demographics | Current Assignment | Active Duty Tours | ATRRS History | Medical Status

Create Case

ALL

ADD CASE

Search:

Case Type	Case Number	Status	Previous Status	Date Created	Created By
Extension	2805900	In Progress	Case Started	02/25/2022	Alec.horn
Extension	2805913	In Progress	Case Started	03/08/2022	alec.horn
IST	2805844	Initiate Interstate Transfer	Case Started	12/22/2021	alec.horn
IST	2805848	Initiate Interstate Transfer	Case Started	01/04/2022	alec.horn
Sponsorship	2805915	Manage Sponsor Contact	Initiate Sponsorship	03/08/2022	alec.horn
Transition Service	2650983	Terminated	Financial Counseling	09/11/2014	
Transition Service	2805886	Initial Phase	Case Started	01/12/2022	alec.horn
Transition Service	2805916	Initial Phase	Case Started	03/08/2022	alec.horn

Showing 1 to 8 of 8 entries

5. Choose **IST** from the available drop-down list.

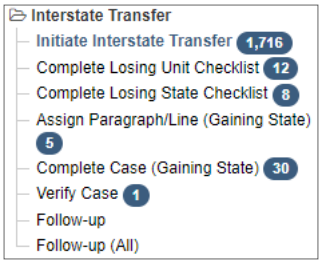
6. Click **ADD CASE**.
7. A dialog box appears asking you to confirm the creation of an IST case.

8. An IST case is created for the Soldier. The point of contact listed on the IST RCT Roster for the state of the Soldier's UPC is sent an automated email notification about the new IST case. (See **RCT Roster** on page 246 .)

5.2 Access An Existing Case

To open an existing RMS User Guide case:

1. Open the **Management Center** within the *Command Center* in the first panel.
2. Open the **Retention Management** folder.
3. Open the **RMS Case Work** folder.
4. Click the **Interstate Transfer** folder.
5. Click the work bucket that describes the next step of the IST process needed for the Soldier's case to progress.



   ▶ The *Roster Report* opens in the second panel.

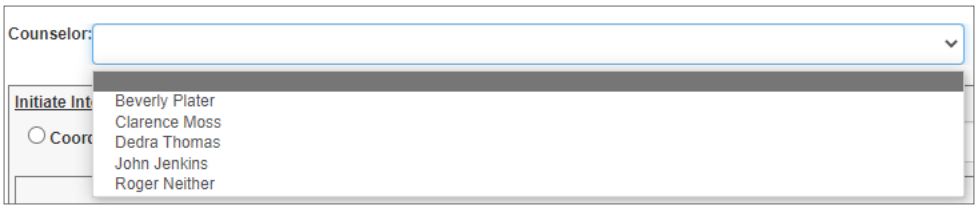
6. Click the Soldier whose case you wish to view.

   ▶ The *Soldier* and *Case Details* panels open.

5.3 Initiate Interstate Transfer

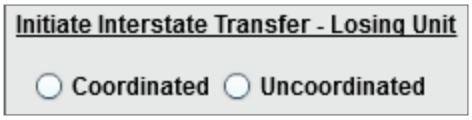
After an IST case has been created, the first step of the process is filled out by the losing unit and Soldier in the fourth panel on the *Initiate Interstate Transfer–Losing Unit* screen.

1. Select a *Counselor* from the drop-down menu.

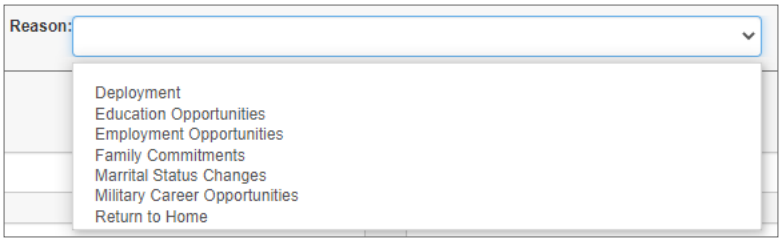


> **Note -** This step is performed by a user in the IST Helpdesk Admin Role.

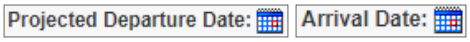
2. Choose whether the transfer is *Coordinated* or *Uncoordinated*.



3. Select a *Reason* from the drop-down menu.



4. Input the Soldier's *Projected Departure Date* (if Coordinated) or *Arrival Date* (if Uncoordinated).



5. Enter the Soldier's new address information in the *New Address* section.
6. Enter the Soldier's new work address information in the *Work Address* section.
7. Click **INITIATE TRANSFER** at the bottom of the section.
   - An *Additional Comments* window appears.

8. Optionally, enter additional comments, then click **OK**.

- The case moves to the *Complete Losing Unit Checklist* work bucket to be completed by the losing unit.

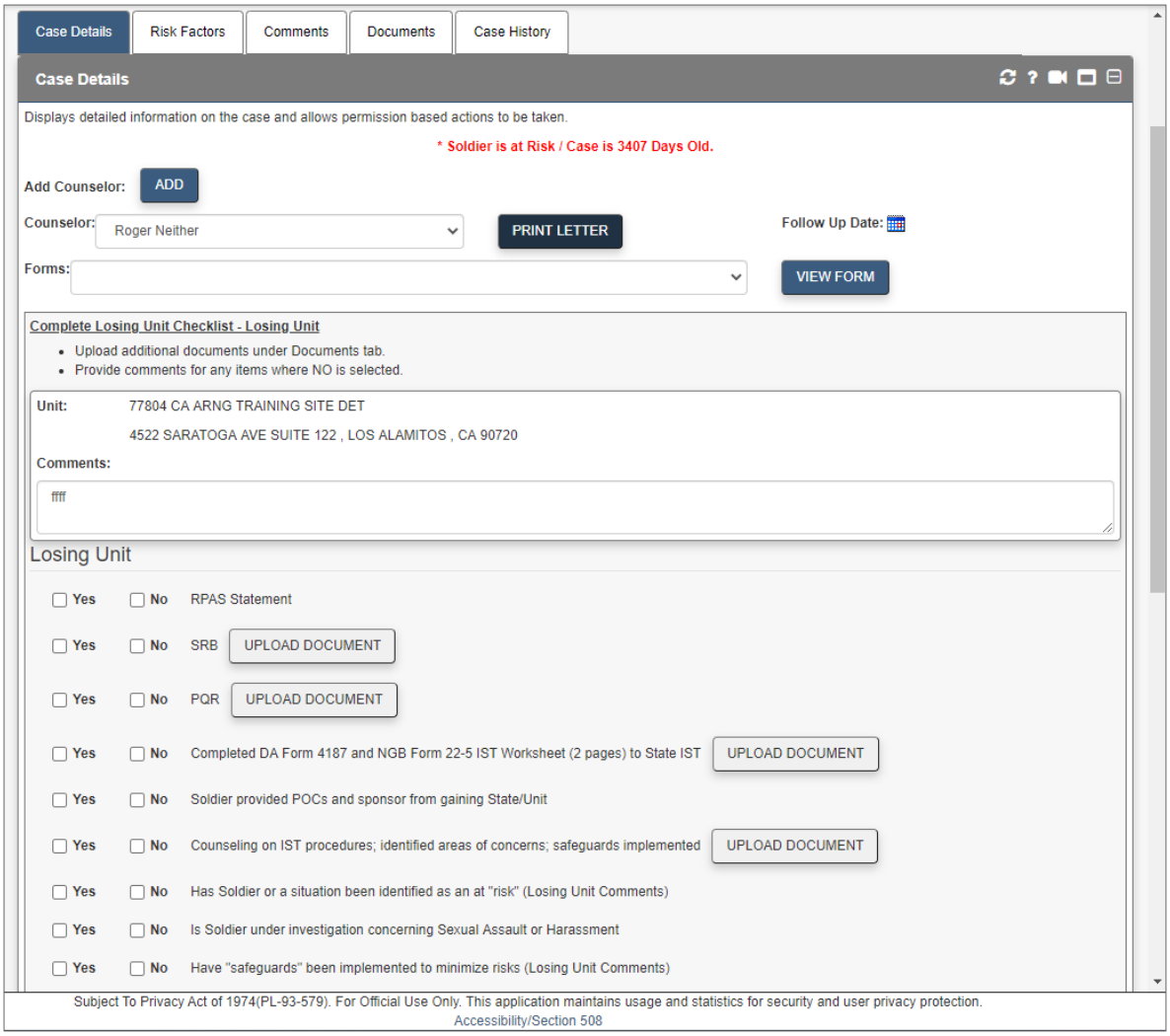
Note - The *Complete Losing Unit Checklist–Losing Unit* screen can also be accessed by clicking the number **2** button at the bottom of the panel.

Tip - For more information about risk factors, refer to **Risk Factors** on page 191.

5.4 Complete Losing Unit Checklist

This step must be performed by the losing unit to answer questions about the Soldier's case, including whether all required procedures have been completed and needed forms have been uploaded.

The *Complete Losing Unit Checklist–Losing Unit* screen loads after the **INITIATE TRANSFER** button is clicked from the *Initiate Interstate Transfer* screen, which is on the first page of the Case tab in the fourth panel. It can also be accessed by selecting a case from the *Complete Losing Unit Checklist* work bucket's Soldier Roster. It is the second page of the Case tab.



Note - Scroll down to view all the lines of the checklist.

1. Complete the checklist, selecting **Yes** or **No** as appropriate.
2. To upload a source document, click **UPLOAD DOCUMENT**.
3. Click **Choose File** and select the document from your computer.
4. Choose a description from the drop-down list of required documents, or select *Other* and type a description of the uploaded document below the drop-down list.
5. Click **SAVE**.
6. Click **COMPLETE CHECKLIST** at the bottom of the section.
   - An *Additional Comments* window appears.

7. Optionally, enter additional comments, then click **OK**.
   - The case moves to the *Complete Losing State Checklist* work bucket to be completed by the losing state.

Note - Once the Unit has completed the Losing Unit Checklist, the system automatically sends the Soldier an email with a status update.

Tip - A *Forms* drop-down menu becomes available at the top of the Case tab after the Initiate Transfer step on the first page. For more information about available forms, refer to **Forms** on page 193.

5.5 Complete Losing State Checklist

The *Complete Losing State Checklist* step must be performed by the losing state to verify that processes required at the state level have been completed.

The *Complete Losing State Checklist–Losing State* screen loads after the **COMPLETE CHECKLIST** button is clicked from the *Complete Losing Unit Checklist*, which is on the second page of the Case tab in the fourth panel. It can also be accessed by selecting a case from the *Complete Losing State Checklist* work bucket's Soldier Roster. It is the third page of the Case tab.

Case Details | Risk Factors | Comments | Documents | Case History

Case Details

Displays detailed information on the case and allows permission based actions to be taken.

* Soldier is at Risk / Case is 3407 Days Old.

Add Counselor: ADD

Counselor: Roger Neither | PRINT LETTER | Follow Up Date:

Forms: | VIEW FORM

Complete Losing State Checklist - Losing State

Unit: 77804 CA ARNG TRAINING SITE DET
4522 SARATOGA AVE SUITE 122 , LOS ALAMITOS , CA 90720

Select Destination State: Virginia

Losing State

- Yes No Uploaded and verified current NGB Form 337
- Yes No Uploaded and verified current DA Form 71
- Yes No Uploaded and verified the Conditional Release Memorandum
- Yes No MILPO Contact info for Losing State UPLOAD DOCUMENT
- Yes No Medical Review by State Surgeon's Office initiated
- Yes No Verified and forward Information to ARNG IST Help Desk and Gaining State IST

COMPLETE CHECKLIST | RETURN TO LOSING UNIT

1 2 3 4 5 6

SAVE | TERMINATE CASE

Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.
Accessibility/Section 508

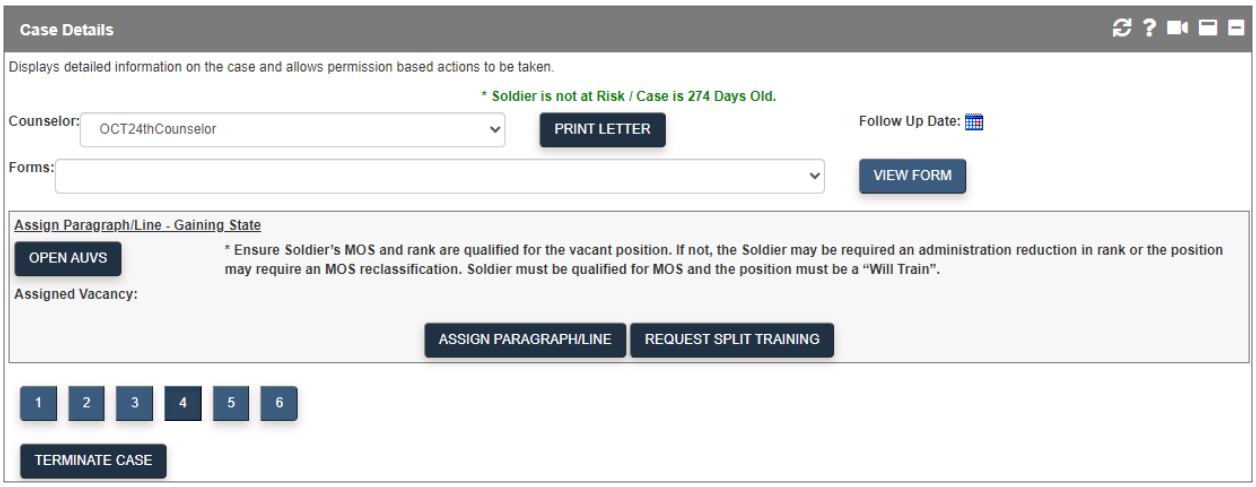
1. Complete the checklist, selecting **Yes** or **No** as appropriate.
2. Click **COMPLETE CHECKLIST**.
   - An *Additional Comments* window appears.
3. Optionally, enter additional comments, then click **Save**.
   - The case moves to the *Assign Paragraph/Line (Gaining State)* work bucket to be completed by the losing state.

> **Note -** To return the case to the losing unit, click **RETURN TO LOSING UNIT**. The case then moves back to the *Complete Losing Unit Checklist* work bucket.

5.6 Assign Paragraph/Line

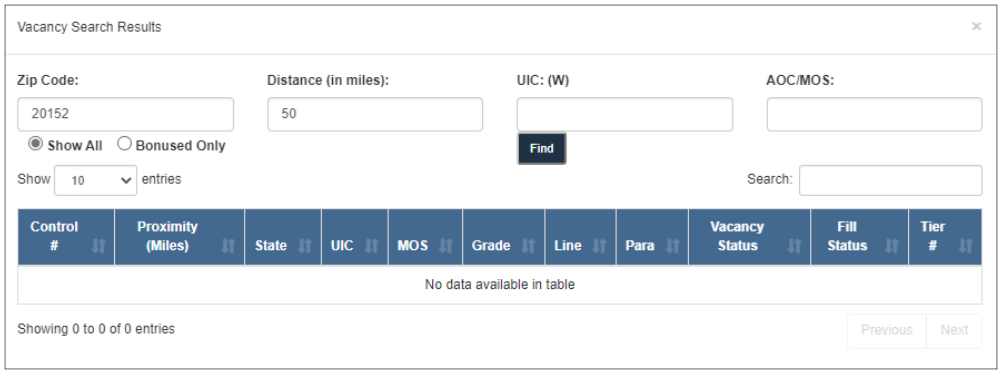
The *Assign Paragraph/Line* step must be finished by the gaining state to select a vacancy for the Soldier. If a preferred position is currently filled but is expected to become vacant soon, a Split Training request can be submitted.

The *Assign Paragraph/Line–Gaining State* screen loads after the **COMPLETE CHECKLIST** button is clicked from the *Complete Losing State Checklist–Losing State* screen, which is on the third page of the Case tab in the fourth panel. It can also be accessed by selecting a case from the *Assign Paragraph/Line (Gaining State)* work bucket's Soldier Roster. It is the fourth page of the Case tab.



5.6.1 To assign a vacancy

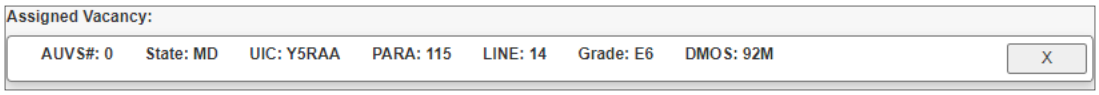
1. Click **OPEN AUVS**.
   - The *Vacancy Search Results* pop-up window opens to search within the Automated Unit Vacancy System (AUVS).



2. Enter your search criteria in the provided fields.
3. Click **Find**.

- AUVS returns all of the vacant positions that match the Soldier's Grade or one higher, contain the selected MOS, and are located within the selected geographical area.

4. Click one of the positions to select it.
   - The position is listed in the *Assigned Vacancy* field.



5. Repeat steps 1-4 as needed to assign a different vacancy.

> **Tip -** Click the **X** button [X] to erase the Assigned Vacancy selection.

6. Click **ASSIGN PARAGRAPH/LINE**.
   - An *Additional Comments* window appears.
7. Optionally, enter additional comments, then click **Save**.
   - The case moves to the *Accept Paragraph/Line–Losing State* work bucket to be completed by the losing state.

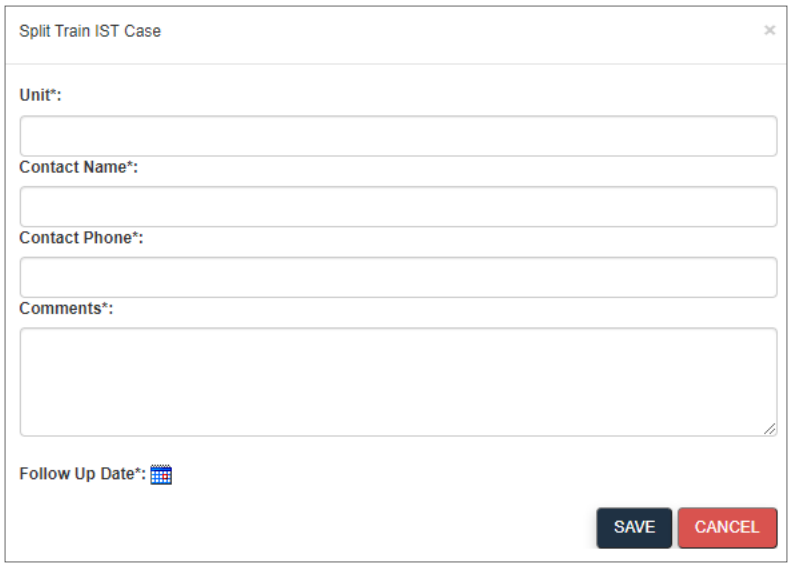
> **Note -** At this stage, the system automatically sends the Soldier an email with a status update.

5.6.2 To request split training

Split Training is an option when the selected position is currently filled but is expected to become vacant soon. Split Training allows the Soldier to train for the position in the gaining state until the position is vacant. The case remains in Split Training status until the losing state either rejects Split Training or clicks the *End Split Training* button on the *Accept Paragraph/Line–Losing State* page when the position is vacated.

1. Click **REQUEST SPLIT TRAINING** if the position in the Assigned Vacancy field has a Fill Status of *Filled/Claimed* in the *Vacancy Search Results* window.

- The *Split Train IST Case* pop-up window loads.



2. Enter the *Unit* of the new position, *Contact Name* and *Contact Phone* of the person the losing state may contact to check on the status of the position, *Comments* about the expected timeline for the position to be vacated, and select a *Follow Up Date* recommended for the losing state to check on the status of the position.
3. Click **SAVE**.
   - The case is now in Split Training status and moves to the *Complete Case - Gaining State* screen on the fifth page of the Case tab. At the top of the screen, a control number displays in parentheses after *Split Train* in the format IST{CaseID}-YYYY-NNN.

     SPLIT TRAIN (IST153444-2022-1)

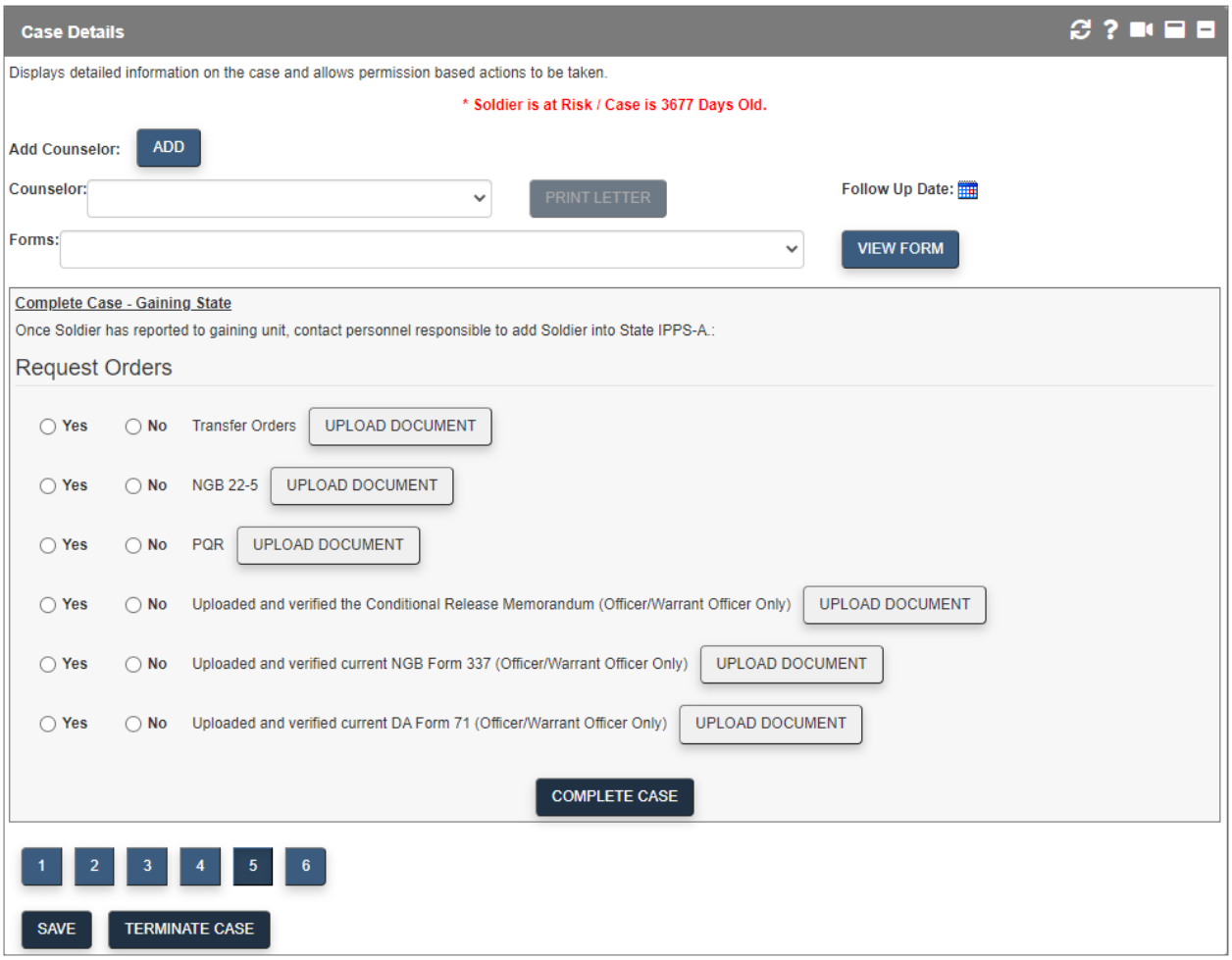
> **Note -** YYYY is the current 4-digit year and NNN is the next 1-3 digit number in the IST sequence for that year.

5.7 Complete Gaining State Checklist

This step must be finished by the gaining state to verify accuracy of documents and that processes required at the state level have been completed.

The *Complete Case–Gaining State* screen loads after a selection is made from the *Accept Paragraph/Line–Losing State* screen, which is on the fifth page of the Case tab in the fourth panel. It can also be accessed by selecting a case from the *Complete Case (Gaining State)* work bucket's Soldier Roster. It is the fifth page of

the Case tab.



1. Complete the checklist, selecting **Yes** or **No** as appropriate.
2. Click **COMPLETE CHECKLIST**.
   - An *Additional Comments* pop-up window loads.
3. Enter comments and click **OK**.
   - The case moves to the *Verify Case* work bucket to be completed by the gaining unit.

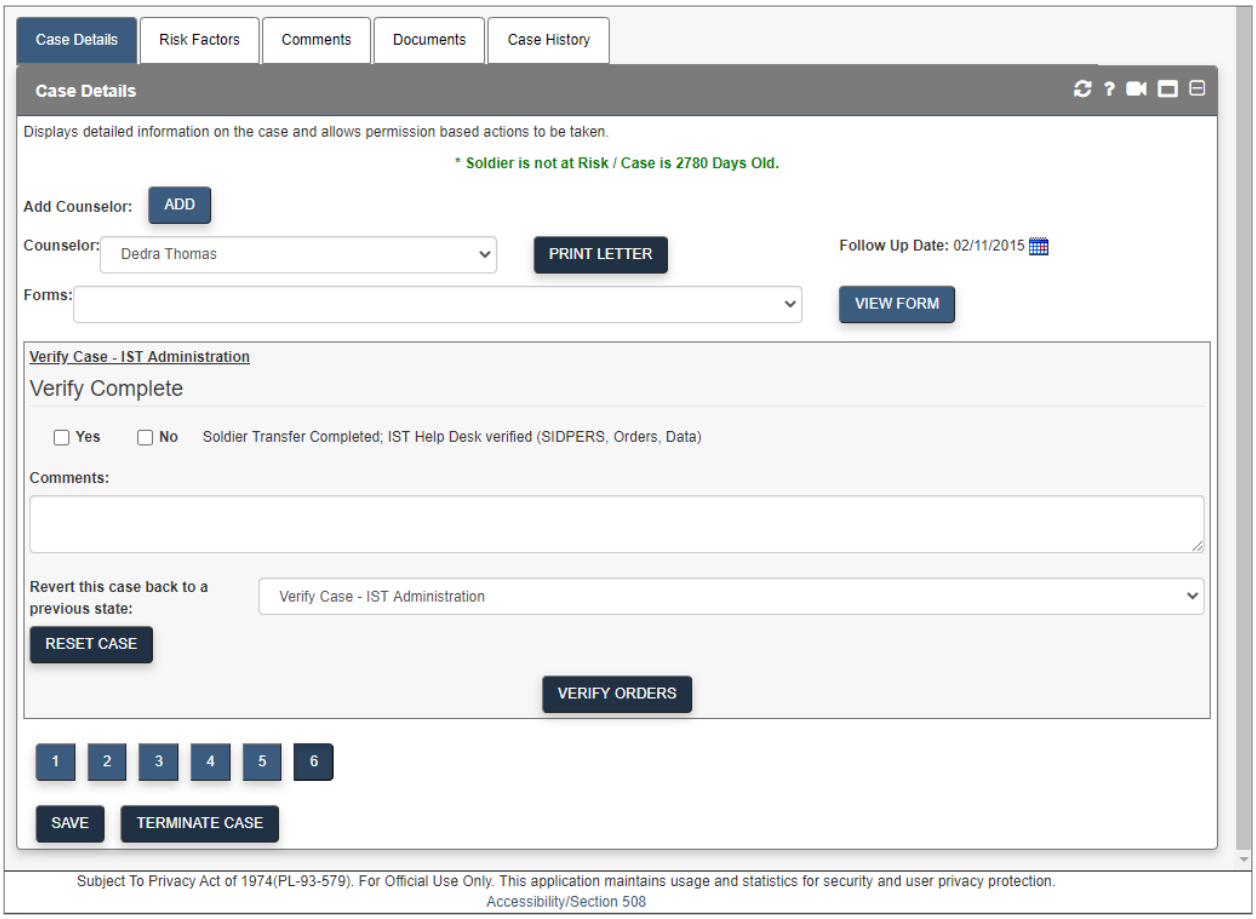
> **Note -** At this stage, the system automatically sends the Soldier an email with a status update.

> **Note -** To return the case to the losing state, click **RETURN TO LOSING STATE**. The case then moves back to the *Complete Losing State Checklist* work bucket.

5.8 Verify Case

The *Verify Case* step must be finished by a user assigned to the IST Helpdesk Admin Role.

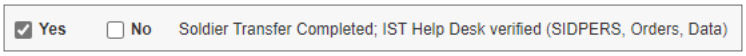
The *Verify Case–IST Administration* screen loads after the **COMPLETE CASE** button is clicked from the *Complete Case–Gaining State* screen, which is on the fifth page of the *Case* tab in the fourth panel. It can also be accessed by selecting a case from the *Verify Case* work bucket's Soldier Roster. It is the sixth page of the Case tab.



1. Verify that the Soldier's Interstate Transfer case is completed.
   - Ensure that all previous steps are completed, such as the Soldier has been added to IPPS-A, has been provided Orders, and case data is correct.

   Note - Meet with the Soldier to verify supporting documentation.

2. Check **Yes**.

3. Enter comments in the *Comments* field.
4. Click **VERIFY ORDERS**.
   - An *Additional Comments* pop-up window loads.

5. Enter comments and click **OK**.
   - The IST case is completed.

5.8.1 Reopen a Case

After a case has been verified, a *Reopen Case* button appears at the bottom-left of the fourth panel.

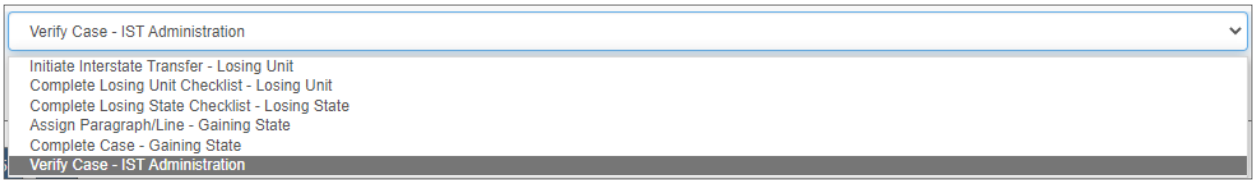
1. Click **REOPEN CASE**.
   - An *Additional Comments* pop-up window loads.
2. Enter comments and click **OK**.
   - The case returns to the *Verify Case–IST Administration* screen.

5.8.2 Reset a Case

After a case has been reopened, the *Reset Case* button is enabled to send a case back to a specific stage.

1. Click the drop-down list in the *Verify Case–IST Administration* screen.

2. Select the stage you would like to send the case back to.



3. Click **RESET CASE**.
   - An *Additional Comments* pop-up window loads.
4. Enter comments and click **OK**.
   - The case is sent back to the selected stage to be completed by the relevant parties.

5.9 Follow Up

The *Follow-up* work bucket contains open cases assigned to a specific Help Desk user and/or all cases with a follow-up date of today's date or earlier, depending on the user's role. The *Follow-up (ALL)* work bucket contains all open cases with a follow-up date.

Throughout the Interstate Transfer process, you can assign a follow-up date to a Soldier's case, allowing them to go back and revisit the Soldier's case at a later time.

1. Click the *Follow-up* work bucket and select a Soldier from the *Follow Up* Roster Report in the second panel.
2. Review the Soldier's information within the third panel.
3. Continue working on the Soldier's case as necessary.

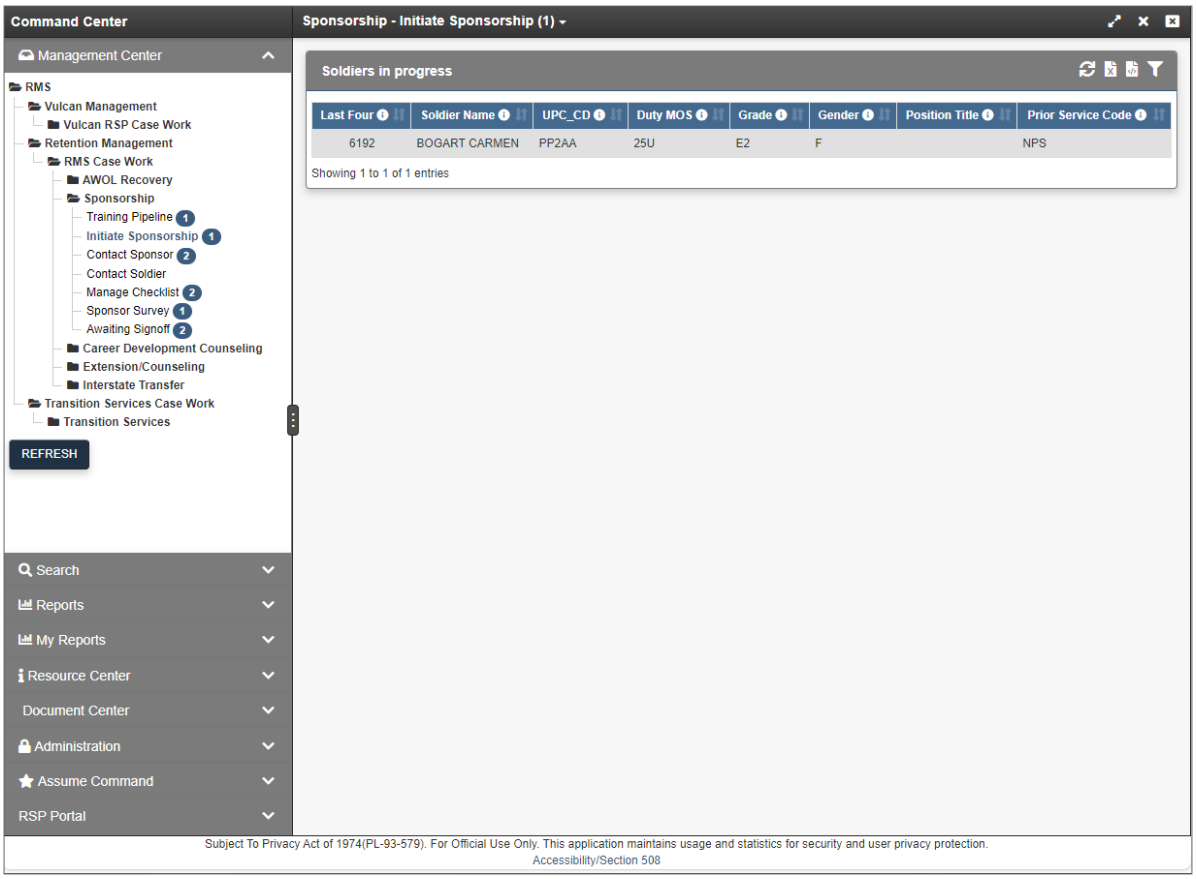
6 Sponsorship

RMS allows you to assign Sponsors to Soldiers who are joining a new Unit, either as a Prior Service or Non-Prior Service accession. From there, the assigned Sponsor is responsible for completing a checklist with the new Soldier, and is able to track the completion of this checklist through the module.

6.1 Initiate a Sponsorship Case

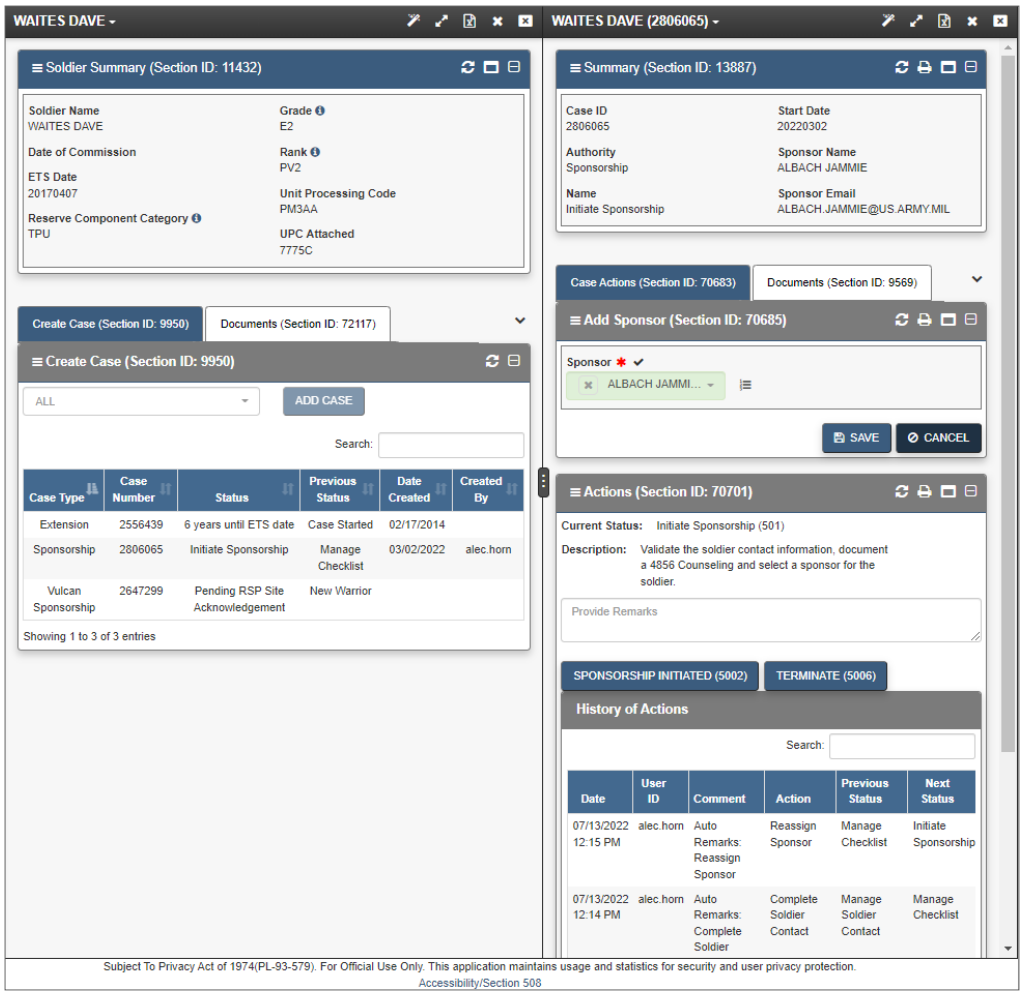
1. Within the *Command Center*, open the *Management Center* tab and expand the **Sponsorship** menu.

2. Click the **Initiate Sponsorship** work bucket to display its Soldier Roster in the second panel.

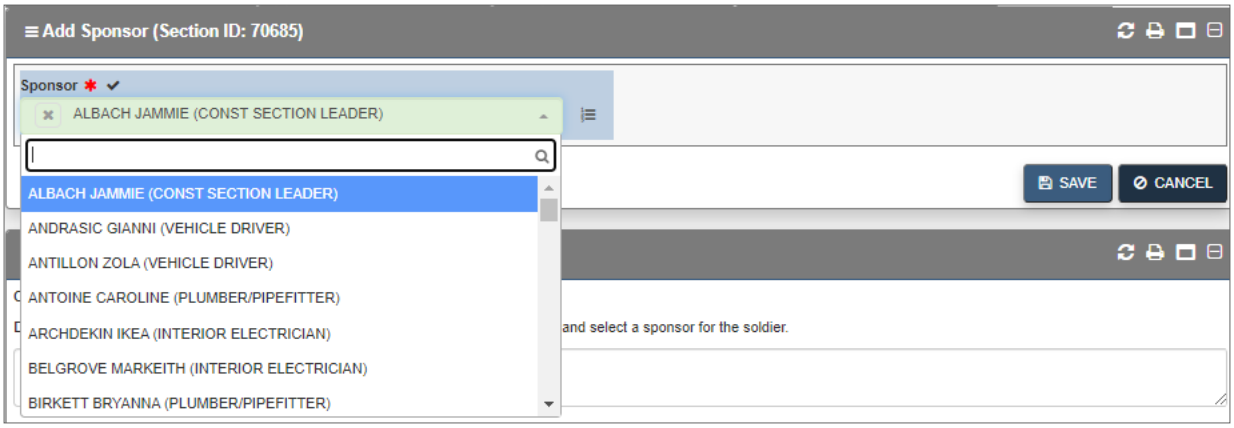


3. Select a case from the Soldier Roster.

- Soldier Details open in the third panel. Case Details open in the fourth panel.

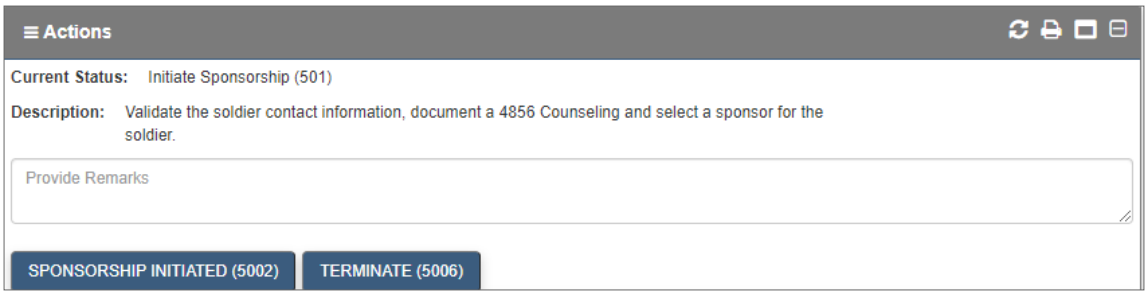


4. Select a Sponsor from the drop-down menu in the Panel *Add Sponsor* section and click **SAVE**.

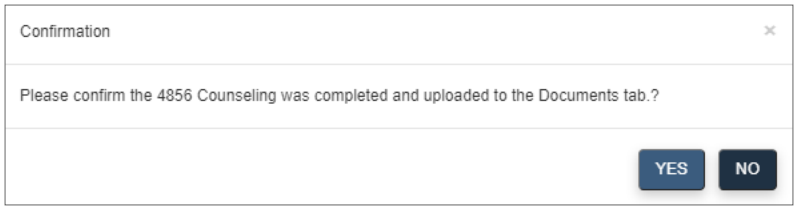


Note - Sponsors are typically the same rank as the Soldier they'll be helping.

5. Enter remarks in the provided field.



6. Click **SPONSORSHIP INITIATED**.
   - A *Confirmation* box appears.



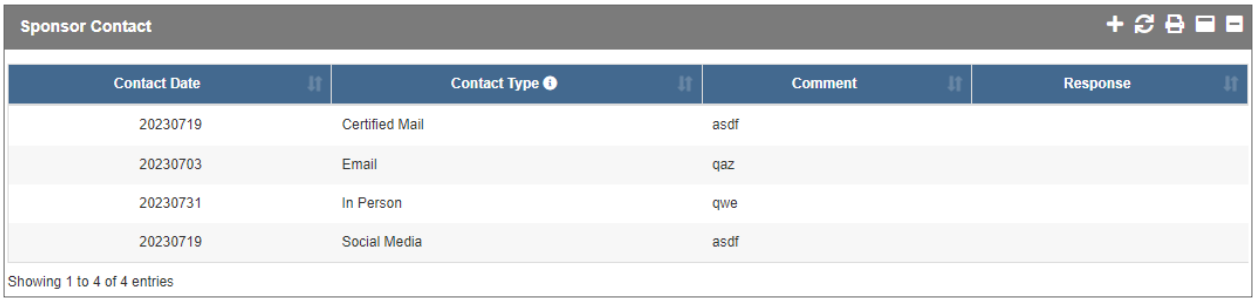
7. Click **YES**.
   - The fourth panel is refreshed and the case is moved to the *Contact Sponsor* work bucket.

6.2 Contact a Sponsor

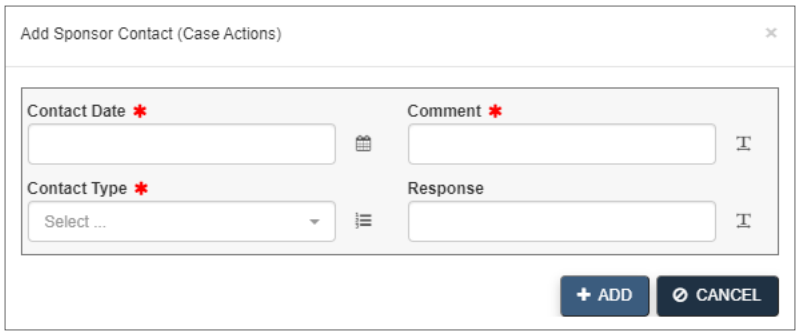
From the *Sponsor Contact (Case Actions)* section in panel 4, you can record each time the Sponsor has been notified.

To add a new contact:

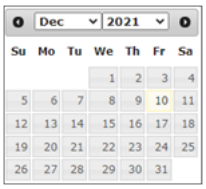
1. Click the **Add** icon.



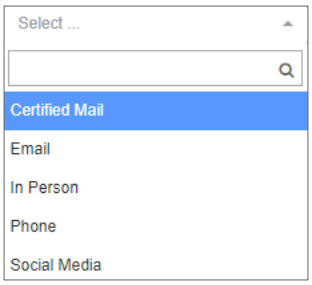
- The *Add Sponsor Contact (Case Actions)* window opens.



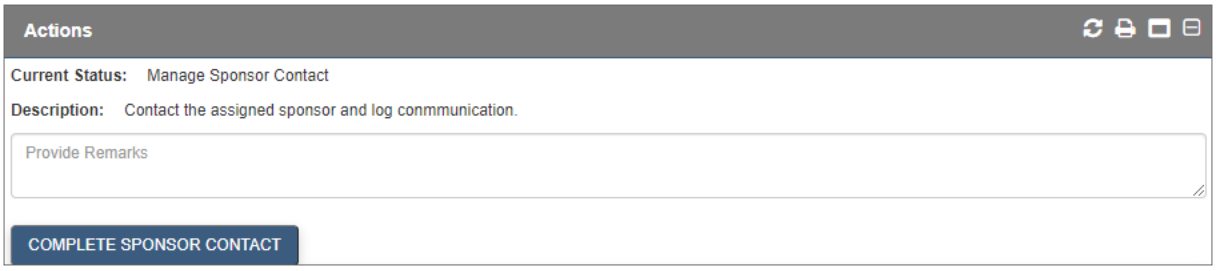
2. If the date of contact was not today, select a date by clicking the calendar icon .



3. Select the method of contact from the *Contact Type* drop-down list.



4. Describe the contact in the *Comment* text box.
5. Click **+ADD**.
6. Enter remarks in the provided field.



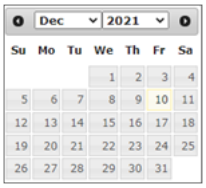
7. Click **COMPLETE SPONSOR CONTACT**
   - A confirmation window opens. Click **YES** to proceed to the *Contact Soldier* work bucket.

6.3 Contact a Soldier

From the *Soldier Contact* screen, you can record each time the Soldier has been notified.

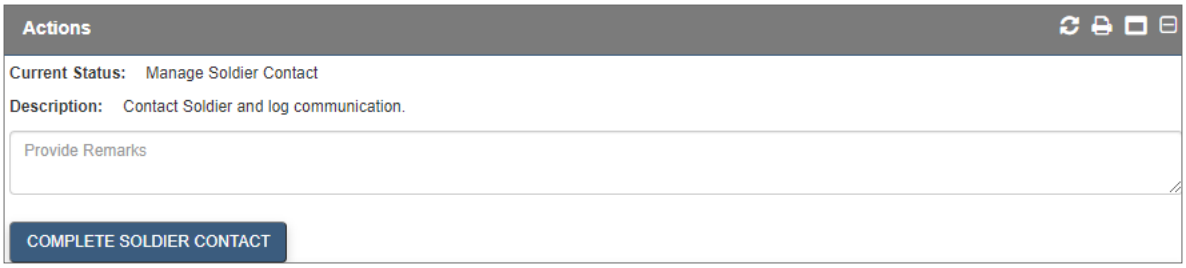
To add a new contact:

1. Click the **Add** icon in the *Soldier Contact* section.
2. If the date of contact was not today, select a date by clicking the calendar icon .



3. Select the method of contact from the drop-down list.

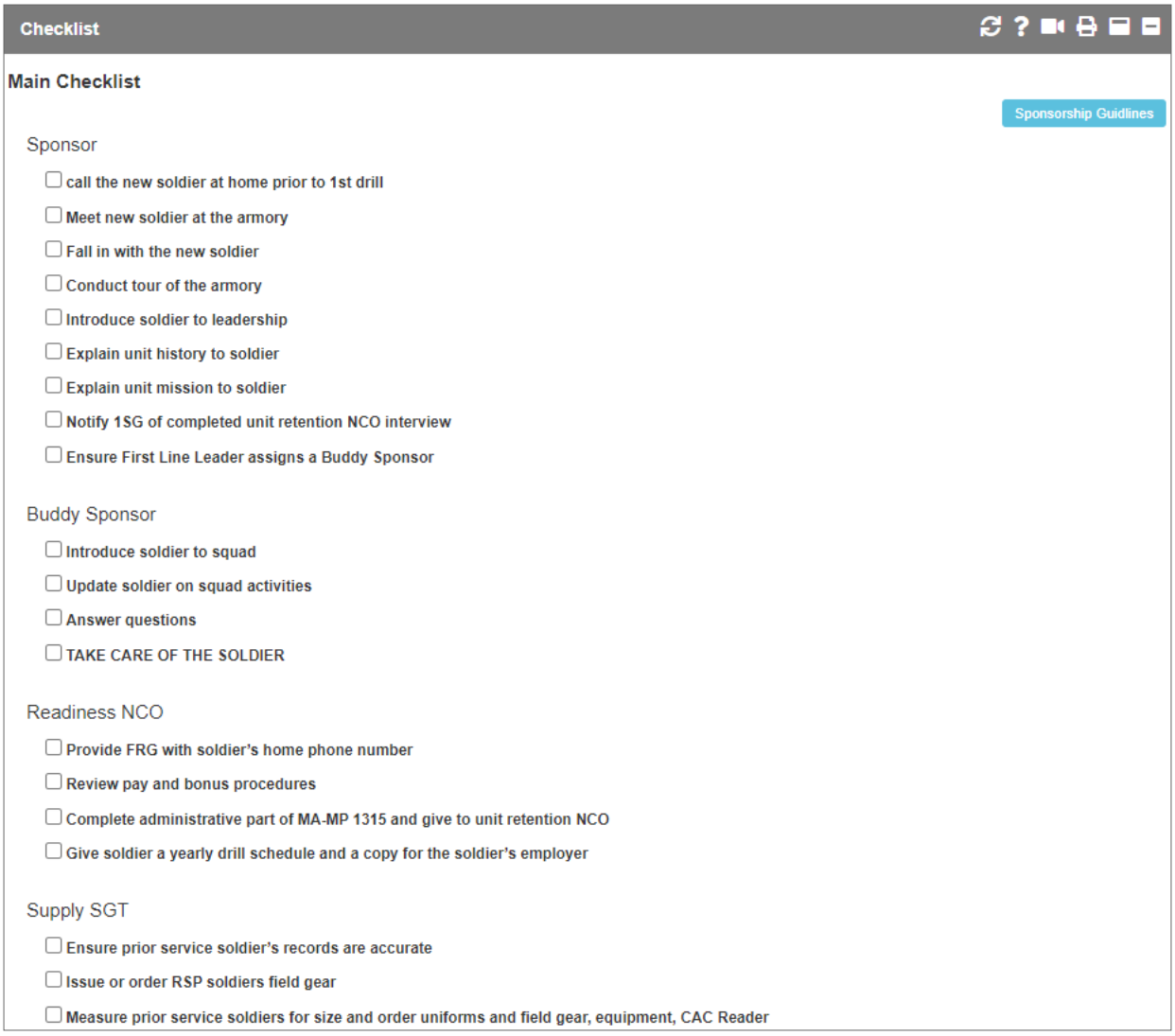
4. Describe the contact in the note text box.
5. Click **+ADD**.
6. Enter remarks in the provided field.



7. Click **COMPLETE SOLDIER CONTACT**.
   - A confirmation window opens. Click **YES** to proceed to the *Manage Checklist* work bucket.

6.4 Manage Checklist

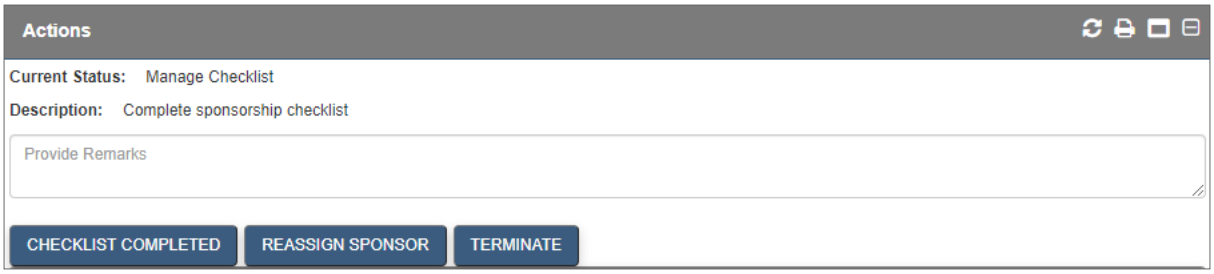
The *Manage Checklist* screen in the fourth panel allows you to keep track of the Sponsorship and introduction process for a Soldier.



1. Select the appropriate check boxes after the relevant action has been completed.

   Note - Scroll down to view all of the check boxes.

2. Click **SAVE** at the bottom of the checklist to return to it at a later time.
3. Scroll down to the *Actions* section and enter remarks in the provided field.



4. Click an available action button.
   a. Click **CHECKLIST COMPLETED** then click **YES** in the confirmation window to send the checklist to the First Sergeant for approval. The case is moved to the *Sponsor Survey* work bucket.
   b. Click **REASSIGN SPONSOR** to send the case back to the *Initiate Sponsorship* work bucket.
   c. Click **TERMINATE** at any point in the Sponsorship process to terminate the case.

6.4.1 View Sponsorship Guidelines

1. Click **Sponsorship Guidelines** at the top of the checklist.

2. The file is downloaded as a Word document.

> **Tip -** Sponsorship Guidelines can also be accessed from the *References* folder in the Command Center's Resource Center.

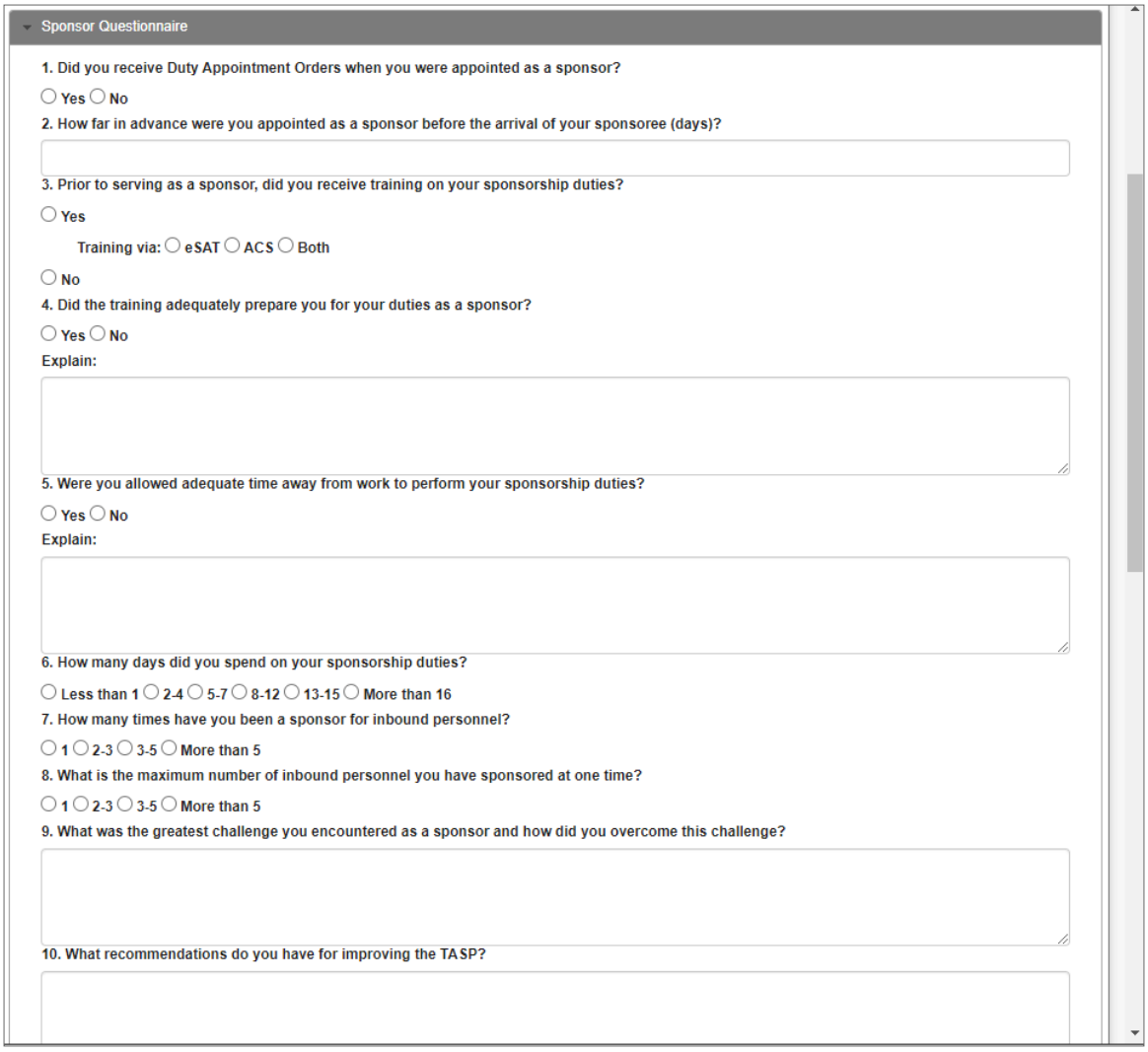
6.4.2 Reassign a Sponsor

1. Click **REASSIGN SPONSOR**.
   - A confirmation window opens.

2. Click **YES**.
3. The case is returned to the *Initiate Sponsorship* work bucket where you can select a new Sponsor.

6.5 Sponsor Survey

The Sponsor should complete the *Sponsor Questionnaire* after the Sponsorship Checklist is completed.



Sponsor Questionnaire

1. Did you receive Duty Appointment Orders when you were appointed as a sponsor?

○ Yes ○ No

2. How far in advance were you appointed as a sponsor before the arrival of your sponsoree (days)?

3. Prior to serving as a sponsor, did you receive training on your sponsorship duties?

○ Yes

Training via: ○ eSAT ○ ACS ○ Both

○ No

4. Did the training adequately prepare you for your duties as a sponsor?

○ Yes ○ No

Explain:

5. Were you allowed adequate time away from work to perform your sponsorship duties?

○ Yes ○ No

Explain:

6. How many days did you spend on your sponsorship duties?

○ Less than 1 ○ 2-4 ○ 5-7 ○ 8-12 ○ 13-15 ○ More than 16

7. How many times have you been a sponsor for inbound personnel?

○ 1 ○ 2-3 ○ 3-5 ○ More than 5

8. What is the maximum number of inbound personnel you have sponsored at one time?

○ 1 ○ 2-3 ○ 3-5 ○ More than 5

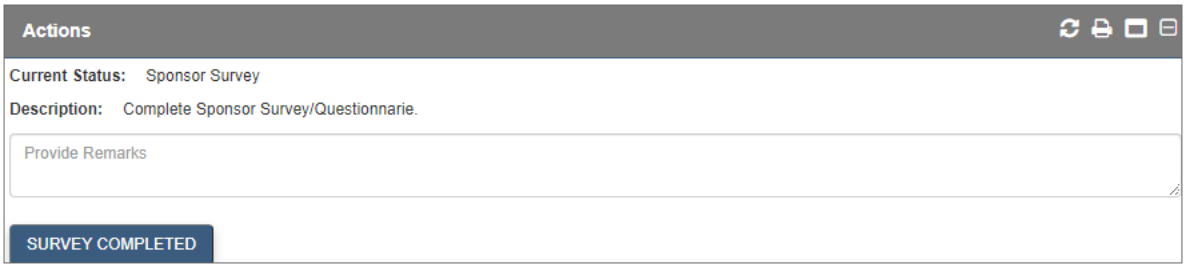
9. What was the greatest challenge you encountered as a sponsor and how did you overcome this challenge?

10. What recommendations do you have for improving the TASP?

1. Select a response for each item in the questionnaire.

   Note - Scroll down to view all of the questions.

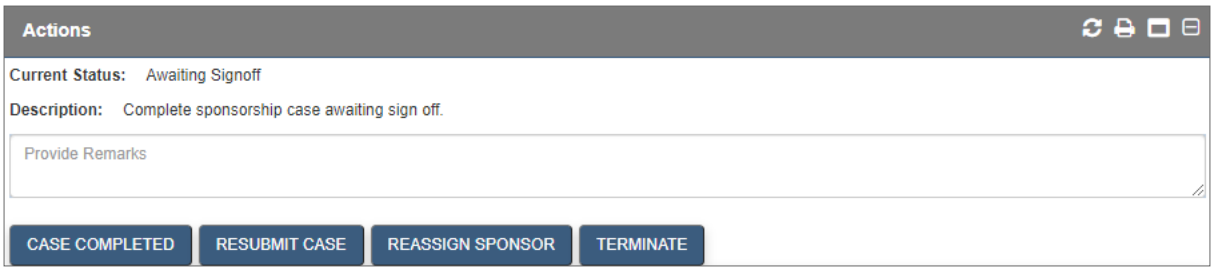
2. Click **SAVE** to save your progress.
3. Scroll down to the *Actions* section.



4. Click **SURVEY COMPLETED**.
   - The case is moved to the *Awaiting Signoff* work bucket.

6.6 Awaiting Signoff

The Sponsorship case is completed from the *Awaiting Signoff* work bucket. Select an available action button: **CASE COMPLETED**, **RESUBMIT CASE**, **REASSIGN SPONSOR**, or **TERMINATE**.



Enter remarks and click an available action button:

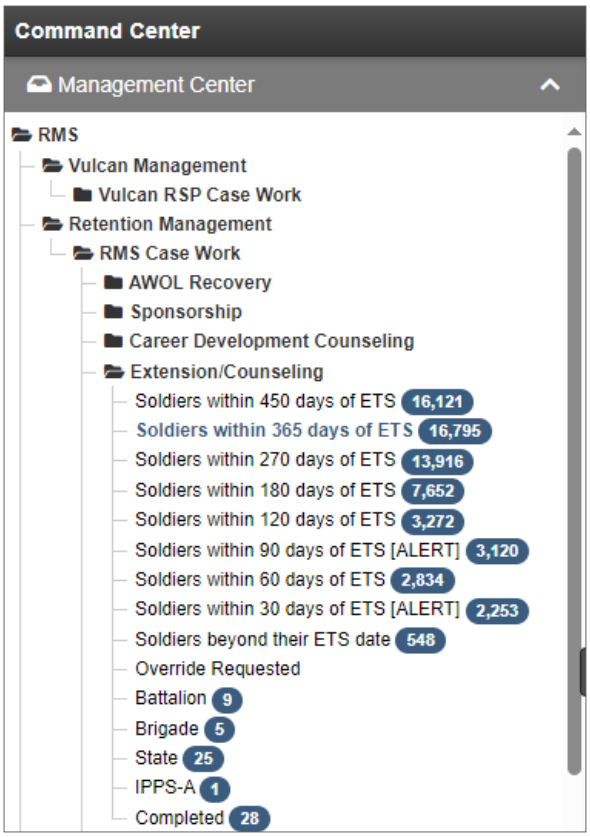
1. **CASE COMPLETED**: sign off on the Sponsorship case to close it.
2. **RESUBMIT CASE**: sends the case back to the *Manage Checklist* work bucket.
3. **REASSIGN SPONSOR**: sends the case back to the *Initiate Sponsorship* work bucket.
4. **TERMINATE:** terminate the case.

7 Extension

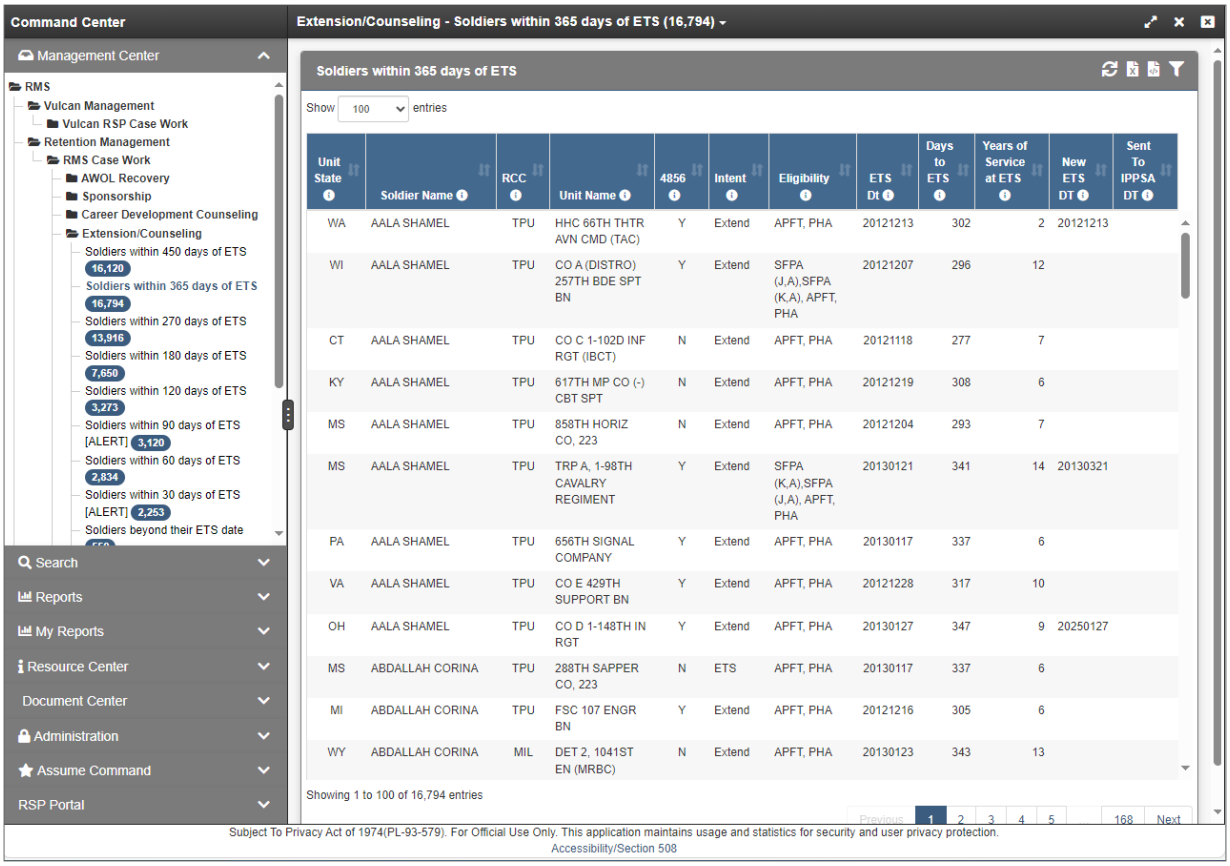
The Extension module is designed to document counseling of Soldiers and assist in extending Soldiers who are within 365 days of their ETS date. A DA Form 4836 can be generated through RMS. RMS Extension ties into the Guard Incentive Management Subsystem (GIMS) in order to allow a Bonus Addendum to be generated for applicable Soldiers.

7.1 Processing an Extension

1. Within the Command Center, open the *Management Center* tab and expand the *Extension/Counseling* menu.



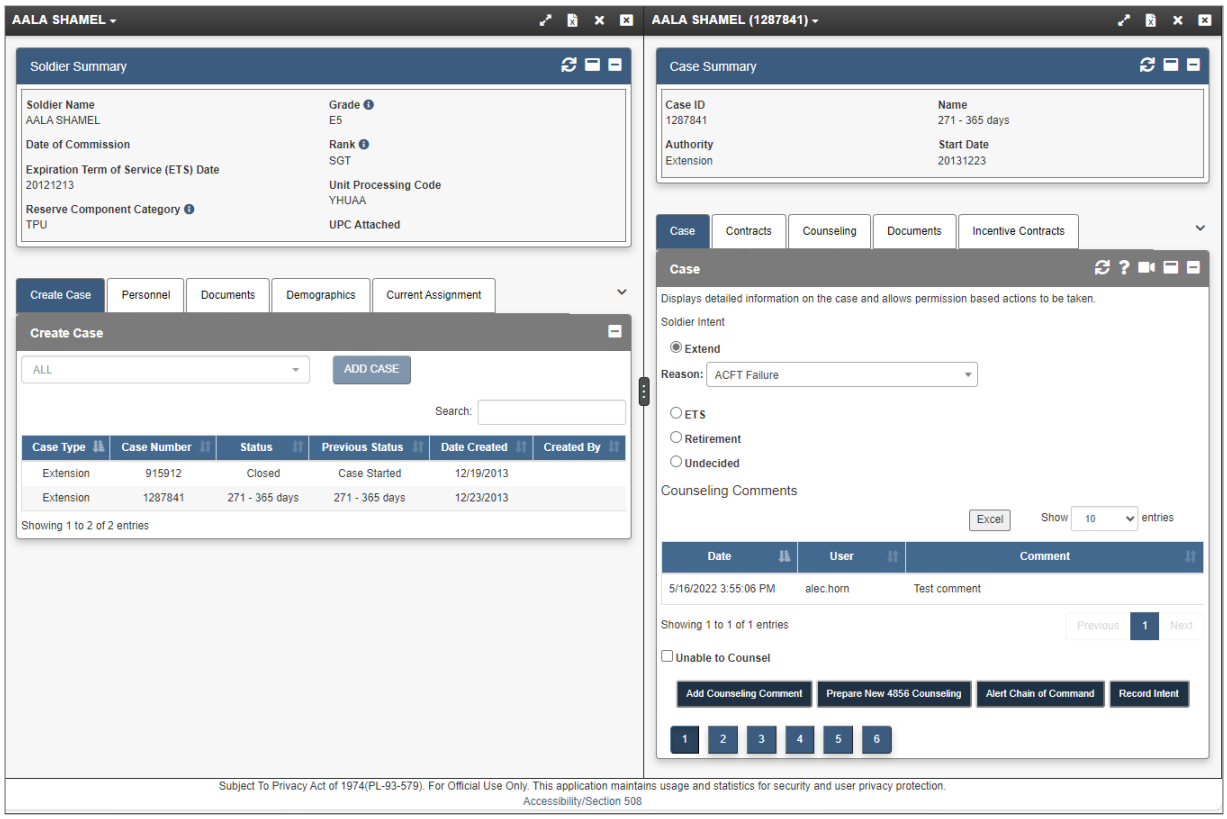
2. Click one of the available work buckets to display its Soldier Roster in the second panel.



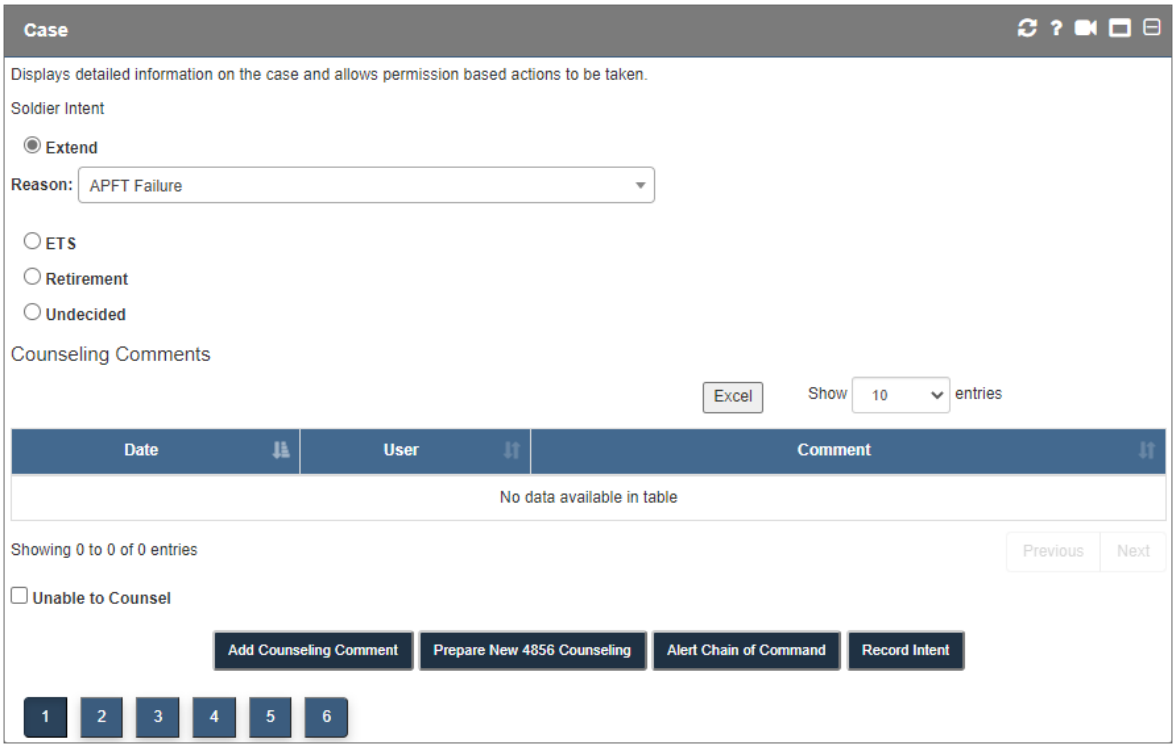
Unit State	Soldier Name	RCC	Unit Name	4856	Intent	Eligibility	ETS Dt	Days to ETS	Years of Service at ETS	New ETS DT	Sent To IPPSA DT
WA	AALA SHAMEL	TPU	HHC 66TH THTR AVN CMD (TAC)	Y	Extend	APFT, PHA	20121213	302	2	20121213	
WI	AALA SHAMEL	TPU	CO A (DISTRO) 257TH BDE SPT BN	Y	Extend	SFPA (J,A),SFPA (K,A), APFT, PHA	20121207	296	12		
CT	AALA SHAMEL	TPU	CO C 1-102D INF RGT (IBCT)	N	Extend	APFT, PHA	20121118	277	7		
KY	AALA SHAMEL	TPU	617TH MP CO (-) CBT SPT	N	Extend	APFT, PHA	20121219	308	6		
MS	AALA SHAMEL	TPU	858TH HORIZ CO, 223	N	Extend	APFT, PHA	20121204	293	7		
MS	AALA SHAMEL	TPU	TRP A, 1-98TH CAVALRY REGIMENT	Y	Extend	SFPA (K,A),SFPA (J,A), APFT, PHA	20130121	341	14	20130321	
PA	AALA SHAMEL	TPU	656TH SIGNAL COMPANY	Y	Extend	APFT, PHA	20130117	337	6		
VA	AALA SHAMEL	TPU	CO E 429TH SUPPORT BN	Y	Extend	APFT, PHA	20121228	317	10		
OH	AALA SHAMEL	TPU	CO D 1-148TH IN RGT	Y	Extend	APFT, PHA	20130127	347	9	20250127	
MS	ABDALLAH CORINA	TPU	288TH SAPPER CO, 223	N	ETS	APFT, PHA	20130117	337	6		
MI	ABDALLAH CORINA	TPU	FSC 107 ENGR BN	Y	Extend	APFT, PHA	20121216	305	6		
WY	ABDALLAH CORINA	MIL	DET 2, 1041ST EN (MRBC)	N	Extend	APFT, PHA	20130123	343	13		

3. Select a Soldier from the Soldier Roster.

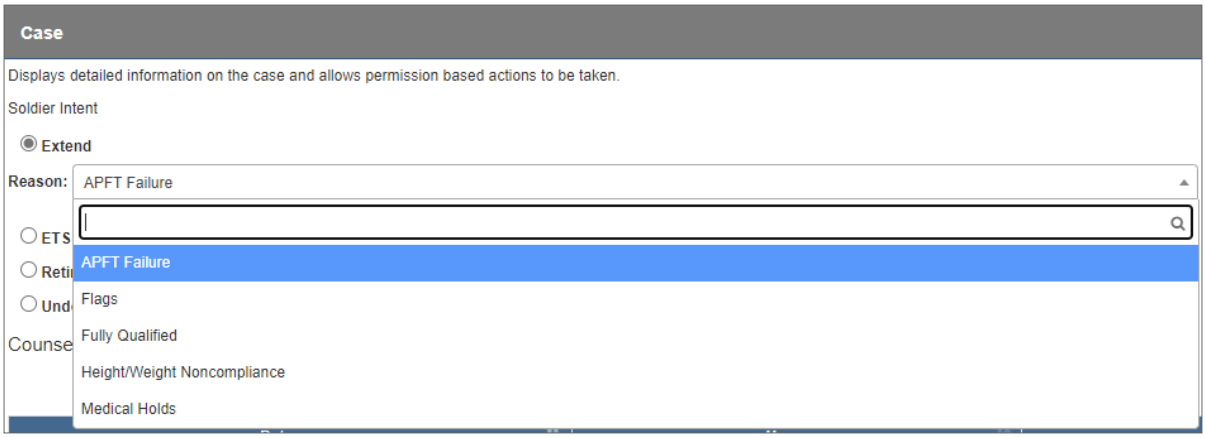
- Soldier Details open in the third panel. Case Details open in the fourth panel. Minimize the third panel.



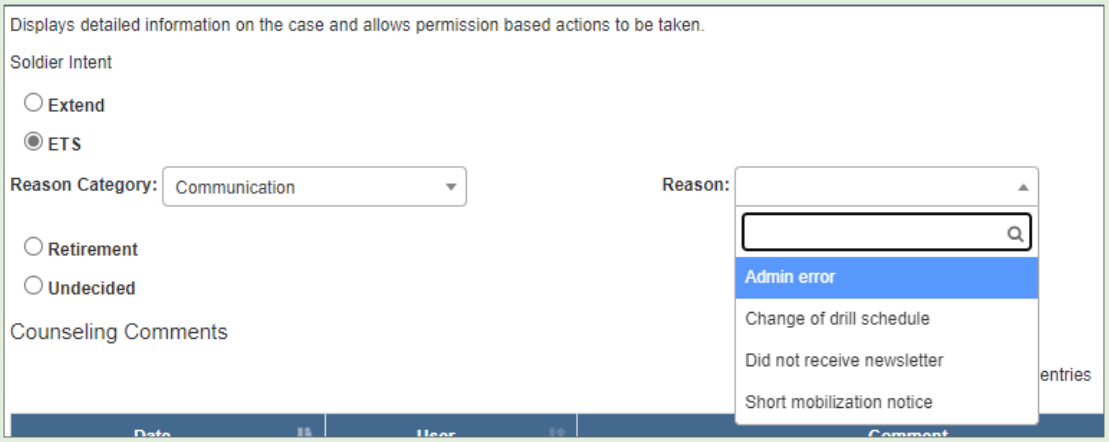
4. In the fourth panel, select the Soldier's intent with regards to the upcoming ETS date from the *Soldier Intent* window. The available choices include *Extend*, *ETS*, *Retirement*, or *Undecided*.



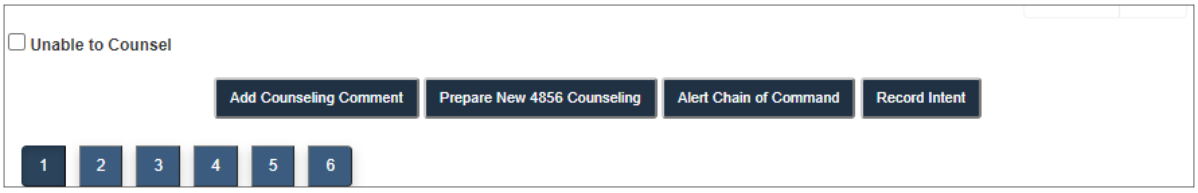
5. If the Soldier intends to *Extend* or *ETS*, select the **Reason**.



Note - When selecting *ETS*, you must choose a reason category first, and then choose a reason.

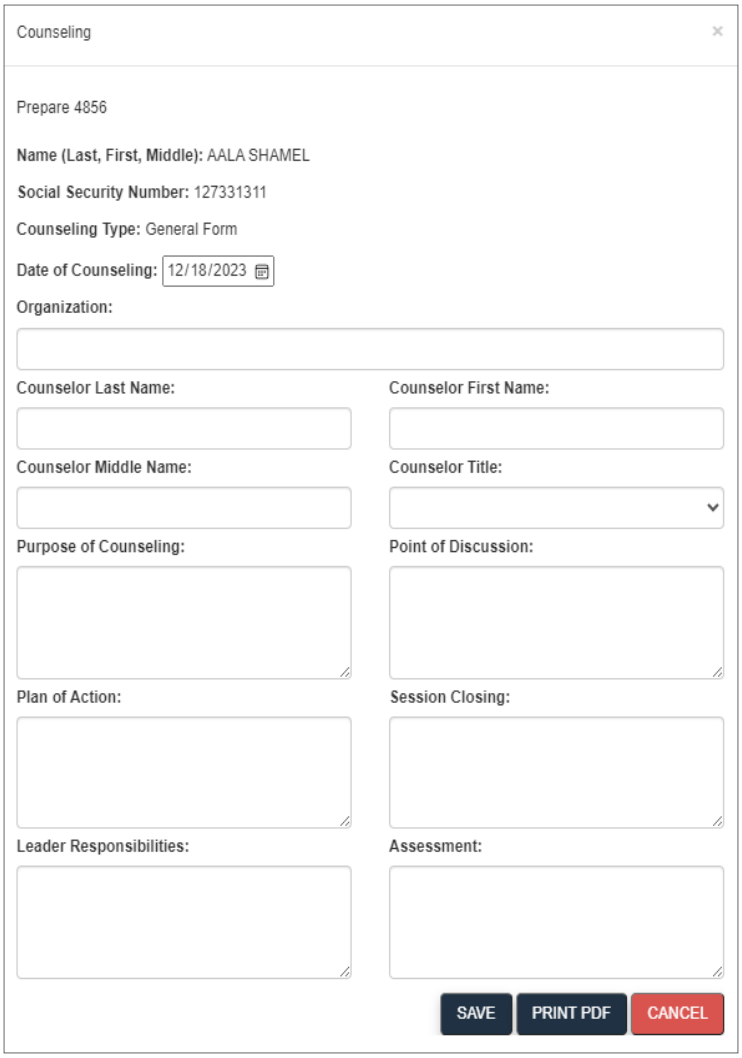


6. Click **Prepare New 4856 Counseling** at the bottom of the screen to officially record a counseling session with the Soldier using DA Form 4856.

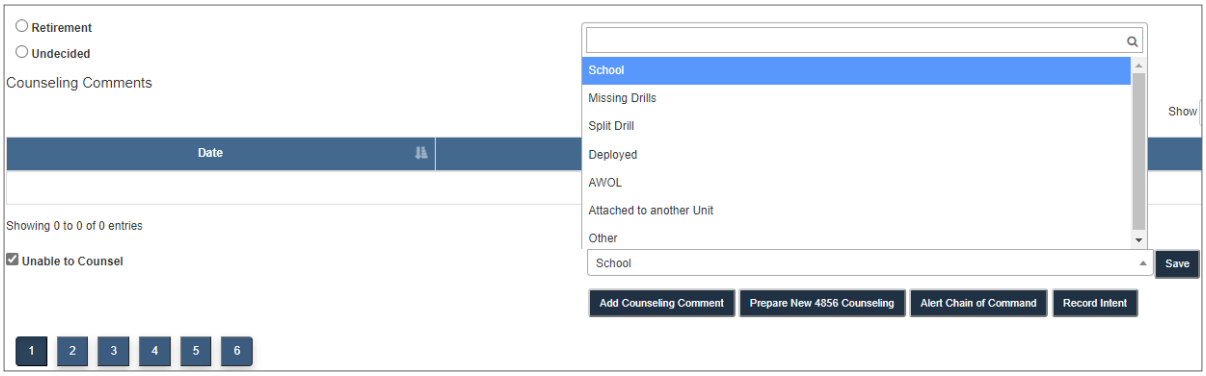


Tip - The *Prepare New 4856 Counseling* button is also at the bottom of the *Counseling* tab.

7. The *Counseling* window appears.



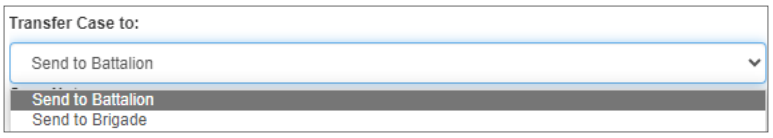
8. Fill out the appropriate information.
9. Scroll down and click **SAVE**.
10. If the Soldier was unable to be counseled, select the **Unable to Counsel** check box, and select a reason from the drop-down menu that appears.



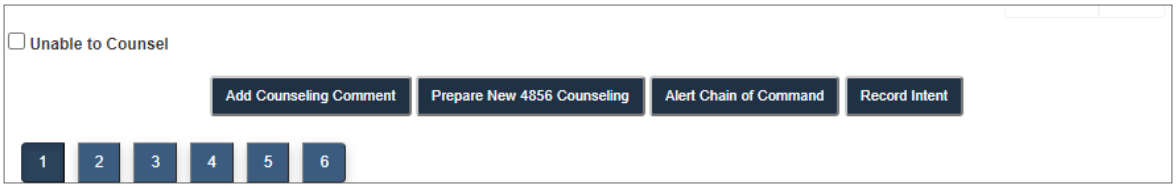
> **Note -** You can click *Add Counseling Comment* to the left of the *Prepare New 4856 Counseling* button to add comments or unofficial counseling notes to the *Counseling Comments* box, along with your username and the date each time a new comment is entered.

11. Optionally, click **Alert Chain of Command** at the bottom of the screen if the Soldier makes a request that is beyond the control of the unit, such as changing a Soldier's MOS.
    - The *Alert Chain of Command for Case* pop-up window appears.

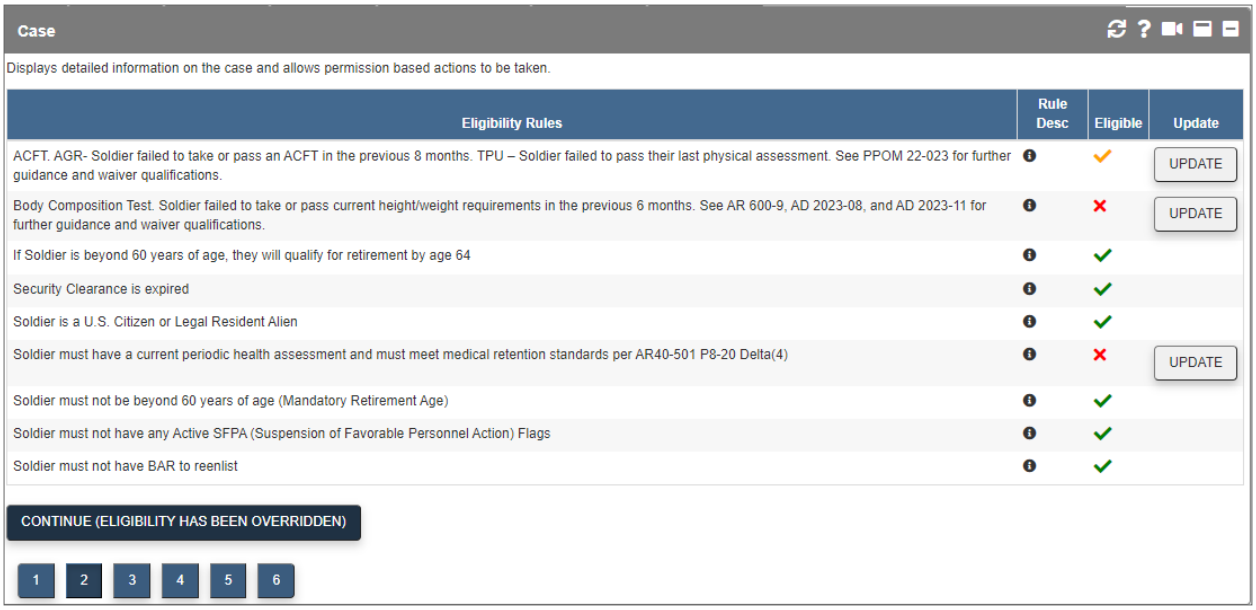
    a. Select **Send to Battalion** or **Send to Brigade** from the *Transfer Case to* drop-down menu.



    b. Enter notes in the *Case Note* field.
    c. Click **SAVE**.
        - The case is transferred to the selected level for review and moved to the Battalion or Brigade work bucket in the Command Center. The case is returned to the unit after the requested action is performed or rejected.
12. Click **Record Intent** at the bottom right of the screen.



13. The *Extension Eligibility* screen appears. The Extension module immediately determines which eligibility rules have been met, which are not applicable, and which have not been met by the Soldier.



Note - NGB Admin and state-level Super Admin users see an *Override Eligibility* button instead of the *Continue* button under the *Eligibility Rules* table. Clicking the *Override Eligibility* button bypasses the *Eligibility Rules* table and sends the case to the *Period of Extension Questions* on the next page. Any user with extension permissions can process the case at this point. The override remains in effect until the case transitions into a new work bucket.

a. The *Rule Met* icon indicates the Soldier satisfactorily meets the requirements for the evaluated rule. Clicking on the *Rule Met* icon displays the eligibility rule that was evaluated and the Soldier's information as to why he/she meets eligibility criteria.

b. The *Rule Updated* icon indicates that a field has been updated. When a case with a icon is updated, the becomes a yellow check mark to note that the field has been updated. This differentiates cases that were originally eligible and those that had to be updated for eligibility.

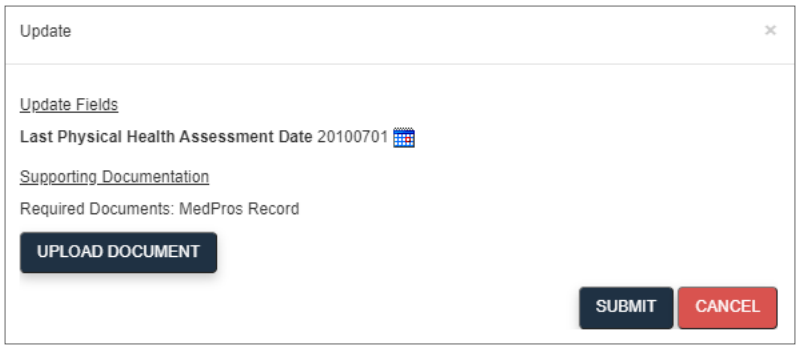
c. The *Rule Not Met* icon indicates the Soldier fails to meet the requirements for the evaluated rule. Clicking on the *Rule Not Met* icon displays the eligibility rule that was evaluated and the Soldier's information as to why he/she does not meet eligibility criteria.

d. The *Rule Description* icon displays the Law, DoDI, SRIP Policy, EIOM, and/or Regulations that support a given rule. Hover on this icon to view information applicable to the case.

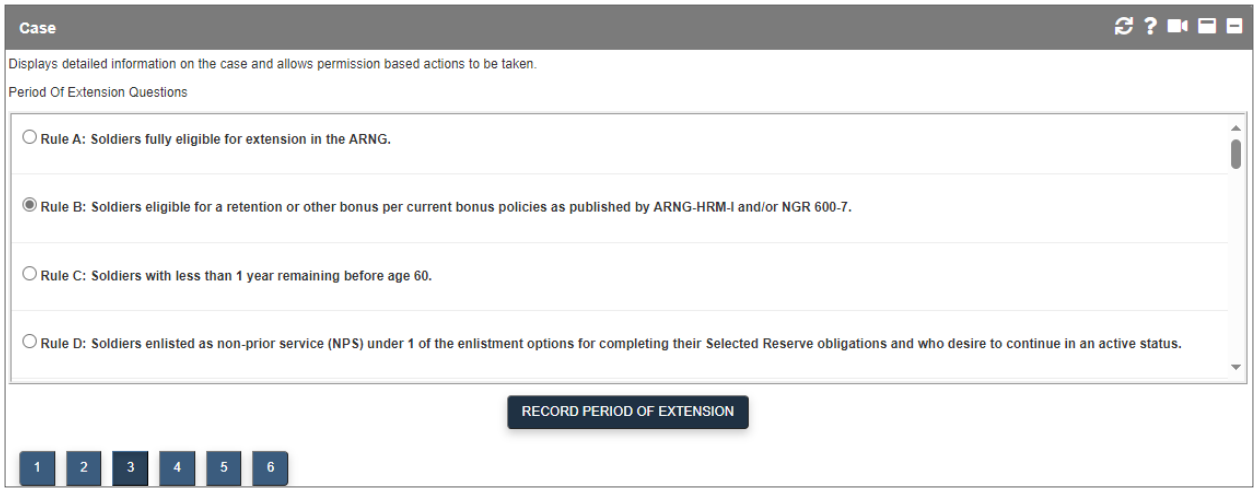
14. If there are any *Rule Not Met* icons in the Eligible column, an *Update* button appears in the *Update* column for that row.

- Click **UPDATE** to update fields that may change the Soldier's eligibility, such as Last Physical Exam Date and Soldier Weight, and supporting documentation for the new information, then

- click **SUBMIT**.



15. Click **CONTINUE**.
    - The *Period of Extension Questions* screen appears.



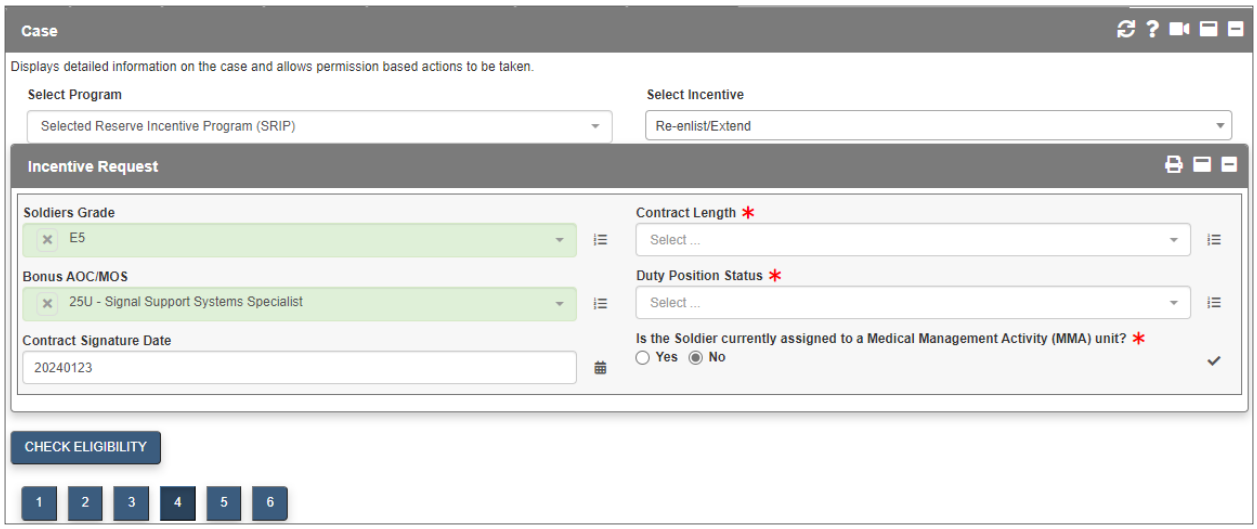
> **Note -** Alternatively, click **OVERRIDE ELIGIBILITY** to continue without meeting the *Eligibility Rules*.

16. Choose the rule that best describes the Soldier's current scenario.

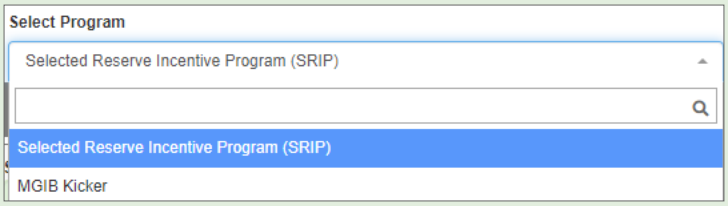
> **Note -** You must select a rule for the Soldier to be eligible to extend. You may only select one rule.

17. Click **RECORD PERIOD OF EXTENSION**. The *Select Program* and *Select Incentive* drop-downs appear.

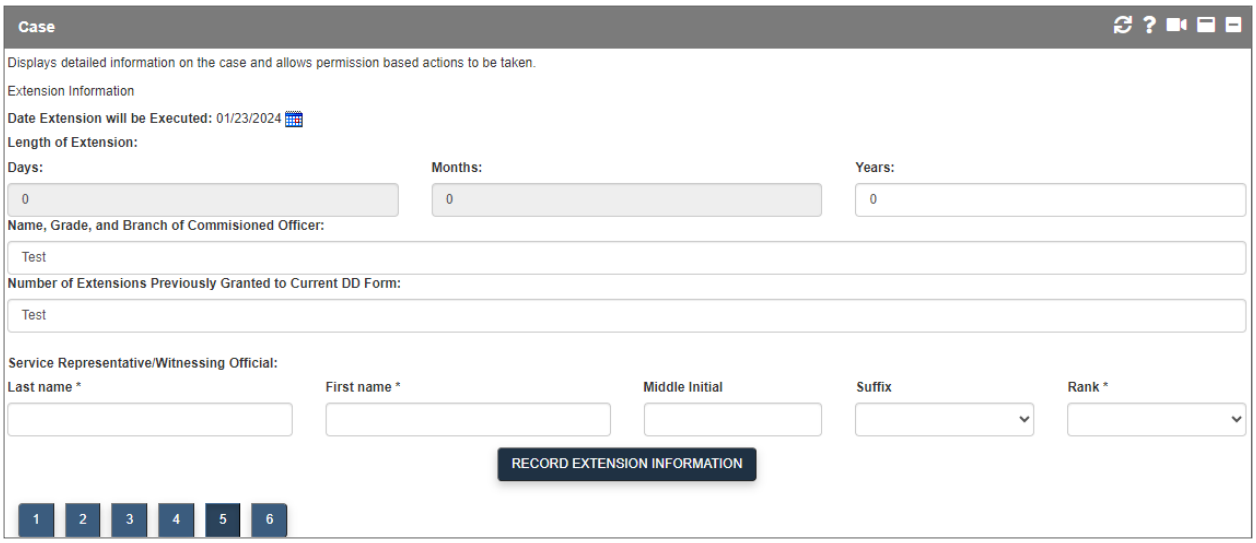
- The *Incentive Request* window also appears. Select the appropriate options and click **CHECK ELIGIBILITY** to view the eligibility rules.



Note - You can select different programs from the *Select Program* drop-down in the *Case* section. Choose from the *Selected Reserve Incentive Program (SRIP)*, or the *MGIB Kicker* programs. The fields in the *Incentive Request* section change depending on the selected program.

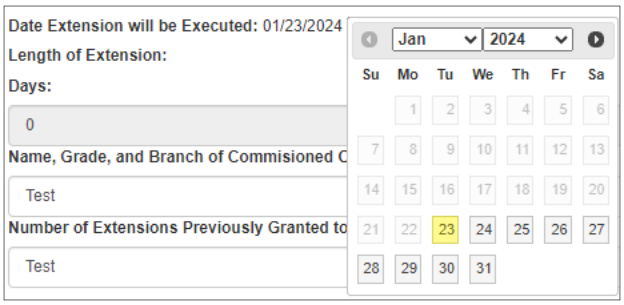


18. Click the button for page 5. The *Extension Information* screen appears.



Note - Some fields may already be filled depending on your previous selections.

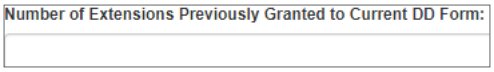
19. Type or select from the date picker the date the extension is executed.



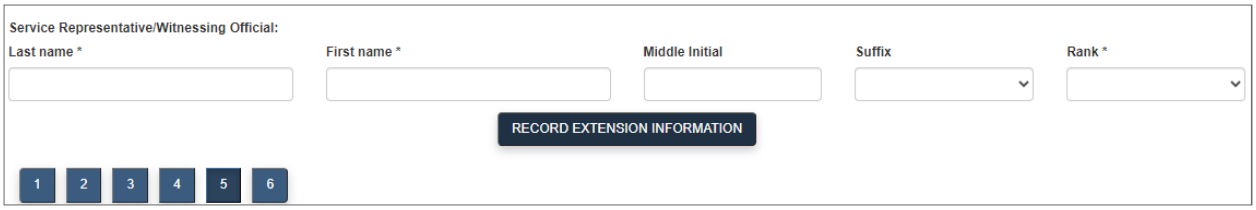
20. Enter a length of extension for the Soldier in the *Years* field.

21. Enter the Name, Grade, and Branch of the Commissioned Officer responsible for signing off on the Soldier's extension.

22. Enter the number of extensions previously granted to the current DD Form.



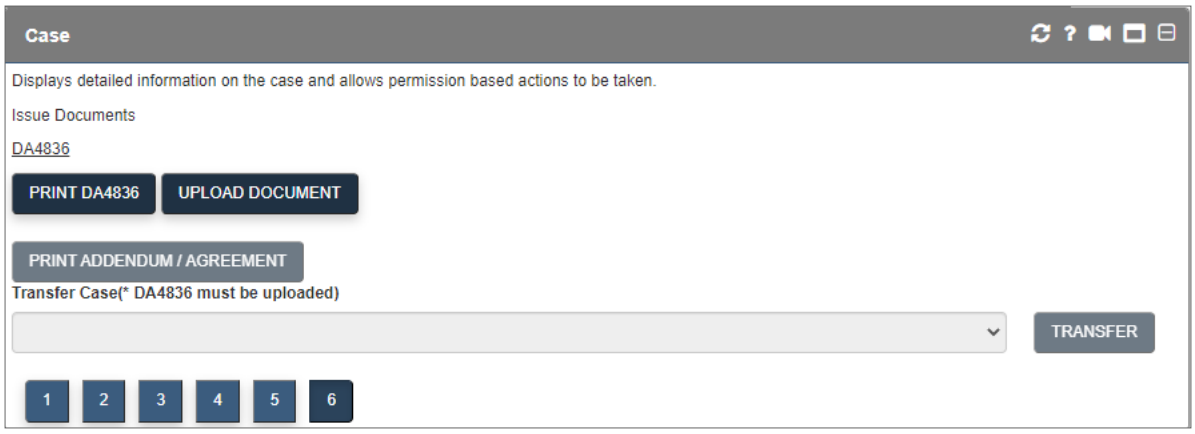
23. Enter the Service Representative's information in the fields at the bottom of the section.



Note - This information is required to proceed.

24. Click **RECORD EXTENSION INFORMATION**.

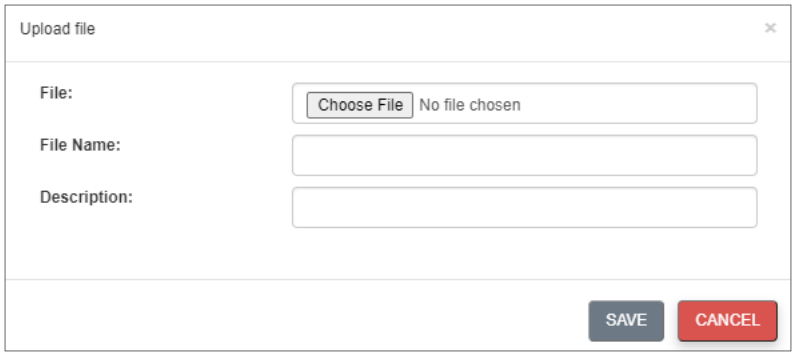
- The *Issue Documents* screen appears.



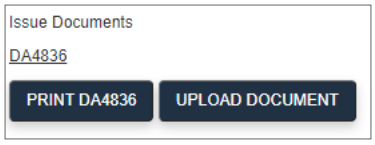
25. Click **PRINT DA4836** to open a PDF of the contract form in a new window.

> **Note -** After completing step 4 of the Extension process (Incentive Request), you can click **PRINT ADDENDUM/AGREEMENT**.

26. After DA Form 4836 has been signed by the Soldier and the commissioned officer and uploaded to your computer, click **Upload Document**.
    - The *Upload file* pop-up window appears.



27. Click **Choose File** to select the document from your files.
28. Enter a file name.
29. Optionally, enter a description.
30. Click **SAVE**.
    - You can click the link to the right of the **UPLOAD DOCUMENT** button to view the uploaded form.

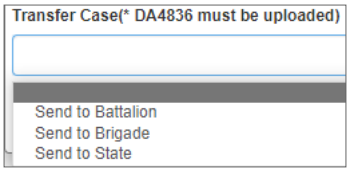


7.2 Transferring a Case

To complete a Soldier's extension:

After the DA Form 4836 has been signed by the Soldier and uploaded, transfer the case to the appropriate command level to submit the extension.

1. From the *Issue Documents* screen, page 6 of the *Case* tab, click the drop-down menu under *Transfer Case* and select to send to Battalion, Brigade, or State.



> **Note -** The *Send to IPPS-A* option is hidden for all work buckets except for the *State* and *Brigade* work buckets.

2. Click **TRANSFER**.

   - Personnel at the selected command level receive an email notification that a case has been transitioned to their work bucket for review.

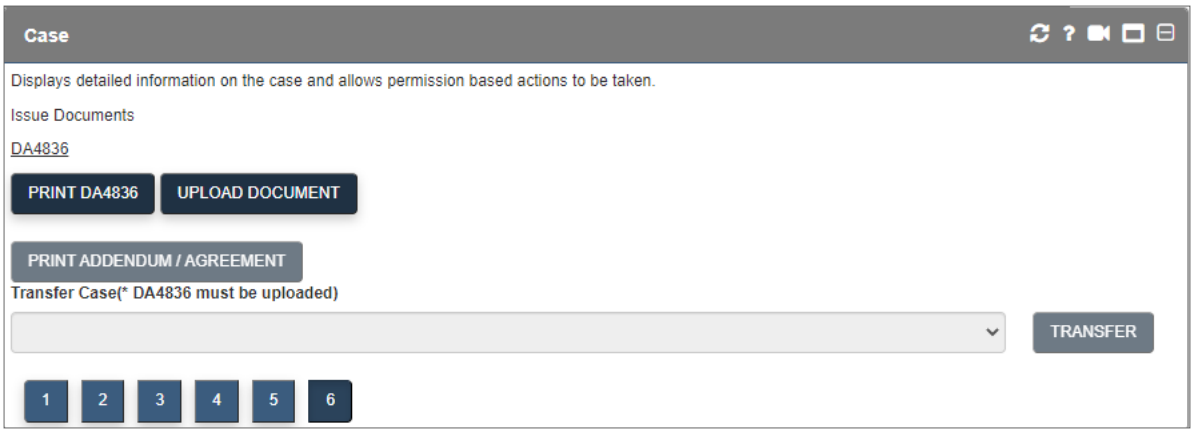
> **Note -** Each command level has its own work bucket where users at that level can transfer to a higher level, from the unit to Battalion, Brigade, State and IPPS-A.

> **Tip -** Contact your incentives manager for questions about incentives.

To transfer a case from the *Battalion*, *Brigade* or *State* work buckets:

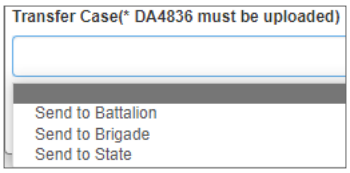
After a case has been transferred to Battalion, Brigade, or State, users at those respective command levels can view the case and its supporting documents in the respective work bucket.

1. From the *Soldier Roster* panel, the case opens to the *Issue Documents* screen, page 6 of Case Details.



   - Open the **Documents** tab to review the DA Form 4836, and any other supporting documentation.

2. If you approve the case, return to the *Issue Documents* screen and click the drop-down menu under Transfer Case to select an available option.



> **Note -** The example above shows the options available for a case in the *Brigade* work bucket.

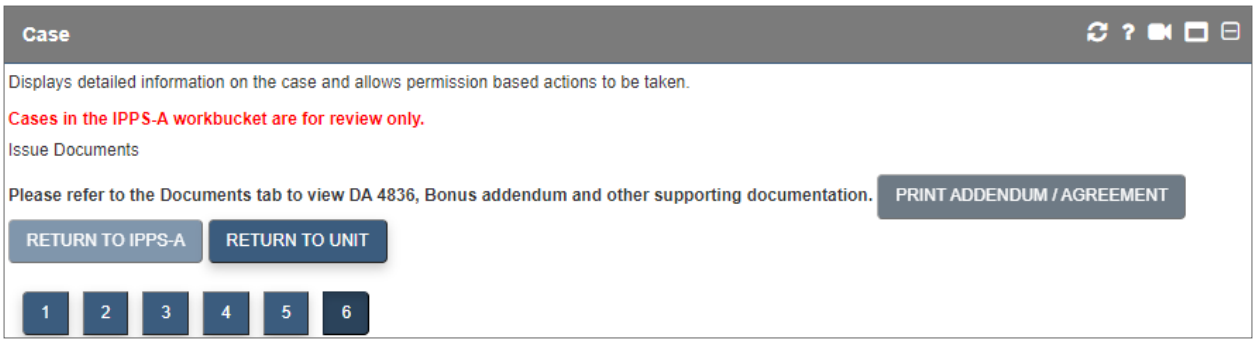
3. Click **TRANSFER**.
   - The person who submitted the case for review receives an email notification that the case has been returned, including your comments.

To transfer a case from the *IPPS-A* work bucket:

Cases that have been transferred to the *IPPS-A* work bucket are either entered into the IPPS-A database or returned to the unit.

> **Note -** Cases in this work bucket are for review only.

From the Soldier Roster panel, the case opens to the *Issue Documents* screen, page 6 of Case Details.



- Click **RETURN TO UNIT** to send the case back to the unit.
- Click **RETURN TO IPPS-A** to send the case information to IPPS-A and close the case.

> **Note -** When you click **Return to IPPS-A** the case remains in the *IPPS-A* work bucket until the ETS date is confirmed. Then it moves to the *Completed* work bucket.

8 Vulcan RSP

The Vulcan module provides management and reporting functions for enlisted Soldiers participating in the Recruit Sustainment Program (RSP). It is utilized primarily by RSP Coordinators and Cadre at the State and RSP Sites. Reports are available for national-level NGB oversight of the RSP.

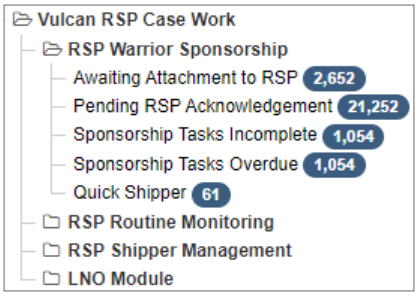
8.1 RSP Warrior Sponsorship

The first stage in the RSP process is completing the *RSP Warrior Sponsorship* case, which consists of tasks that should be completed just after a new Soldier enlists and is attached to the RSP.

8.1.1 Awaiting Attachment to RSP

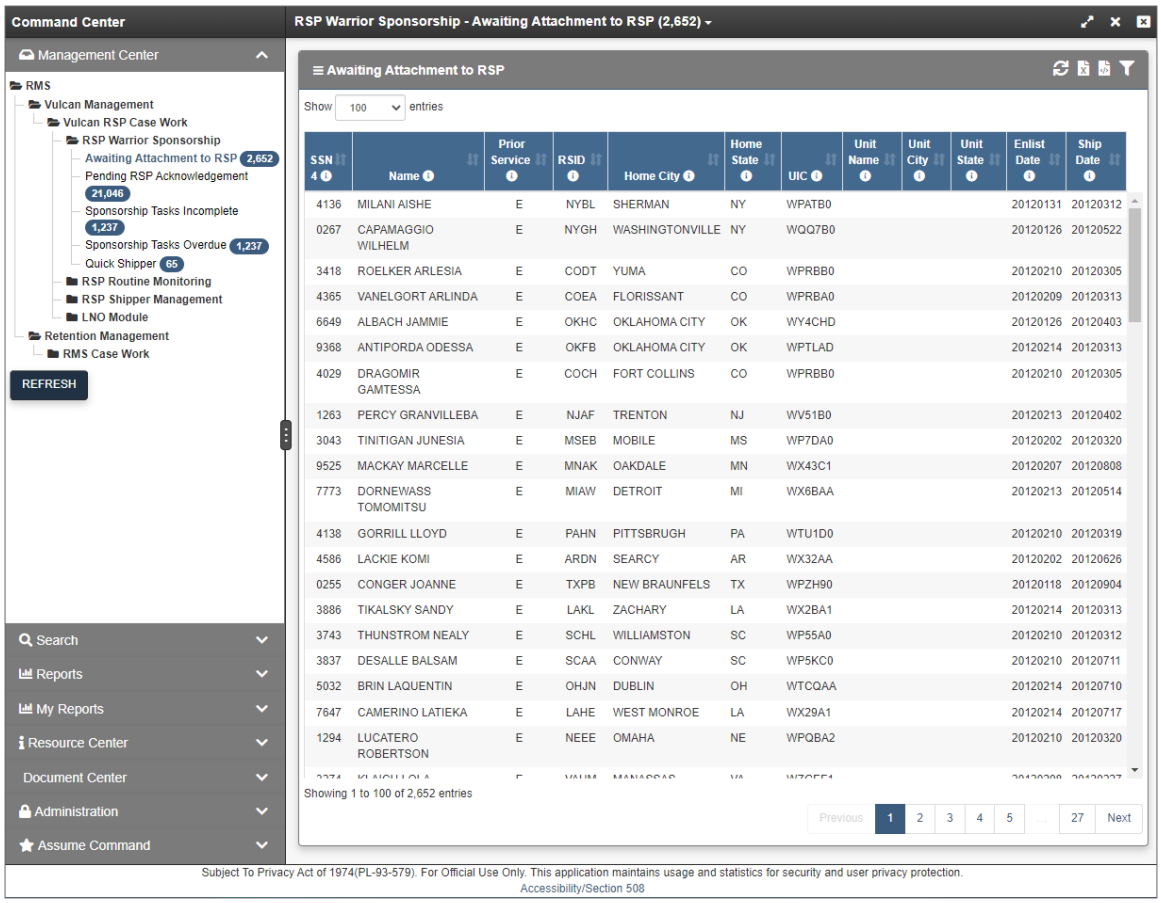
Soldiers in this work bucket are waiting for Recruit RSP Assignments to be completed in IPPS-A; their cases are read-only until the assignment is made.

1. Within the *Command Center*, open the *Management Center* accordion tab and expand the *RSP Warrior Sponsorship* folder within the *Vulcan RSP Case Work* module.



2. Click the **Awaiting Attachment to RSP** work bucket.

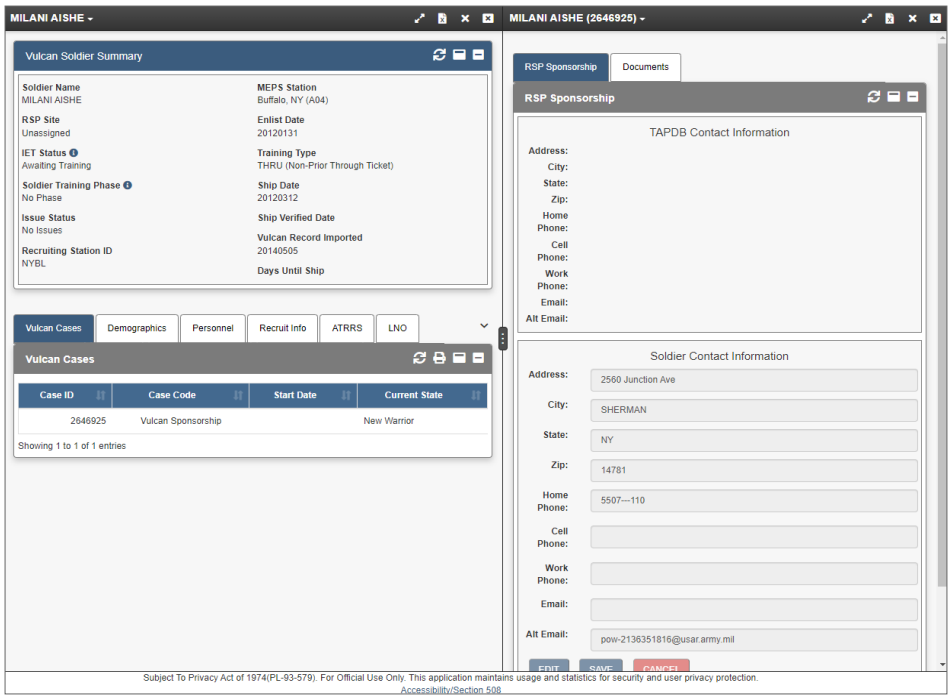
- The *Awaiting Attachment to RSP* Case Roster loads in the second panel.



SSN 4	Name	Prior Service	RSID	Home City	Home State	UIC	Unit Name	Unit City	Unit State	Enlist Date	Ship Date
4136	MILANI AISHE	E	NYBL	SHERMAN	NY	WPATB0				20120131	20120312
0267	CAPAMAGGIO WILHELM	E	NYGH	WASHINGTONVILLE	NY	WQQ7B0				20120126	20120522
3418	ROELKER ARLESIA	E	CODT	YUMA	CO	WPRBB0				20120210	20120305
4365	VANELGORT ARLINDA	E	COEA	FLORISSANT	CO	WPRBA0				20120209	20120313
6649	ALBACH JAMMIE	E	OKHC	OKLAHOMA CITY	OK	WY4CHD				20120126	20120403
9368	ANTIPORDA ODESSA	E	OKFB	OKLAHOMA CITY	OK	WPTLAD				20120214	20120313
4029	DRAGOMIR GAMTESSA	E	COCH	FORT COLLINS	CO	WPRBB0				20120210	20120305
1263	PERCY GRANVILLEBA	E	NJAF	TRENTON	NJ	WV51B0				20120213	20120402
3043	TINITIGAN JUNESIA	E	MSEB	MOBILE	MS	WP7DA0				20120202	20120320
9525	MACKAY MARCELLE	E	MNAK	OAKDALE	MN	WX43C1				20120207	20120808
7773	DORNEWASS TOMOMITSU	E	MIAW	DETROIT	MI	WX6BAA				20120213	20120514
4138	GORRILL LLOYD	E	PAHN	PITTSBRUGH	PA	WTU1D0				20120210	20120319
4586	LACKIE KOMI	E	ARDN	SEARCY	AR	WX32AA				20120202	20120626
0255	CONGER JOANNE	E	TXPB	NEW BRAUNFELS	TX	WPZH90				20120118	20120904
3886	TIKALSKY SANDY	E	LAKL	ZACHARY	LA	WX2BA1				20120214	20120313
3743	THUNSTROM NEALY	E	SCHL	WILLIAMSTON	SC	WP55A0				20120210	20120312
3837	DESALLE BALSAM	E	SCAA	CONWAY	SC	WP5KC0				20120210	20120711
5032	BRIN LAQUENTIN	E	OHJN	DUBLIN	OH	WTCQAA				20120214	20120710
7647	CAMERINO LATIEKA	E	LAHE	WEST MONROE	LA	WX29A1				20120214	20120717
1294	LUCATERO ROBERTSON	E	NEEE	OMAHA	NE	WPQBA2				20120210	20120320

3. Select a case from the Case Roster.

- Soldier Details open in the third panel. Case Details open in the fourth panel.



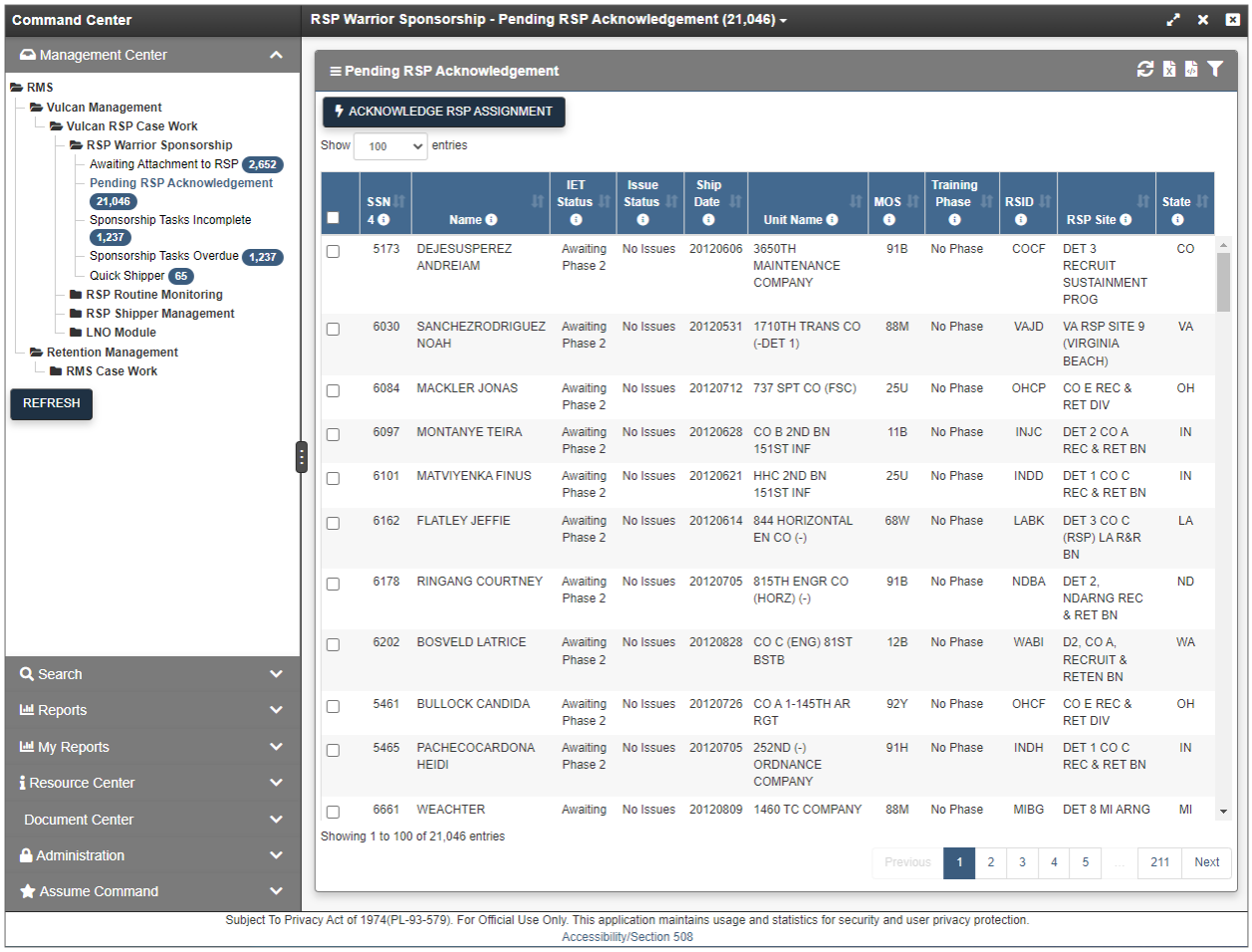
Note - The third and fourth panels are read-only while the Soldier is in the *Awaiting Attachment to RSP* work bucket.

Note - When the case has received an RSP assignment by IPPS-A, it is moved to the *Pending RSP Acknowledgment* work bucket.

8.1.2 Pending RSP Acknowledgment

The *Pending RSP Acknowledgment* work bucket is for RSP site representatives to acknowledge that a new Soldier has been assigned to their site.

1. Click the **Pending RSP Acknowledgment** work bucket.
   - The *Pending RSP Acknowledgment* Case Roster loads in the second panel.



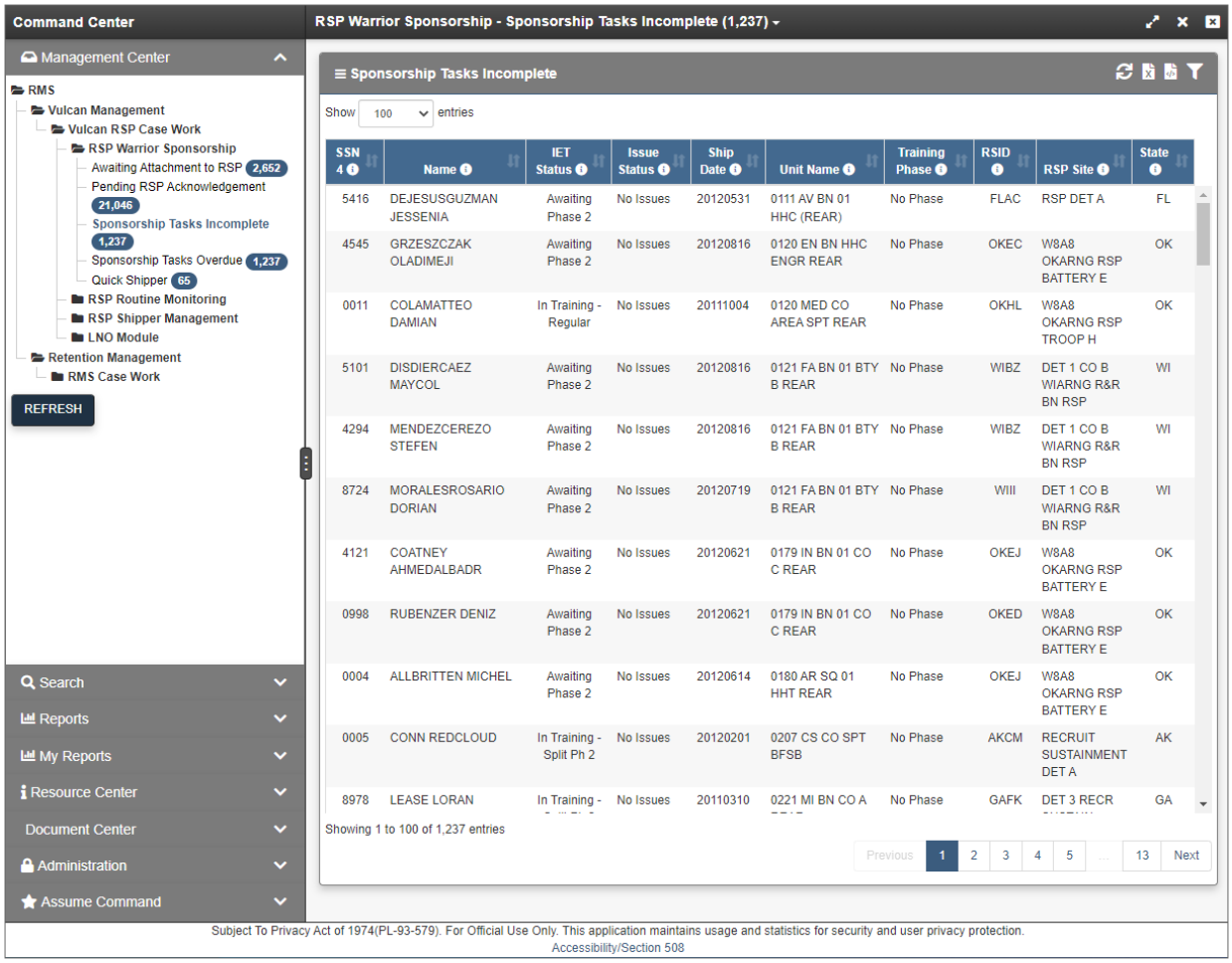
SSN 4	Name	IET Status	Issue Status	Ship Date	Unit Name	MOS	Training Phase	RSID	RSP Site	State
5173	DEJESUSPEREZ ANDREIAM	Awaiting Phase 2	No Issues	20120606	3650TH MAINTENANCE COMPANY	91B	No Phase	COCF	DET 3 RECRUIT SUSTAINMENT PROG	CO
6030	SANCHEZRODRIGUEZ NOAH	Awaiting Phase 2	No Issues	20120531	1710TH TRANS CO (-DET 1)	88M	No Phase	VAJD	VA RSP SITE 9 (VIRGINIA BEACH)	VA
6084	MACKLER JONAS	Awaiting Phase 2	No Issues	20120712	737 SPT CO (FSC)	25U	No Phase	OHCP	CO E REC & RET DIV	OH
6097	MONTANYE TEIRA	Awaiting Phase 2	No Issues	20120628	CO B 2ND BN 151ST INF	11B	No Phase	INJC	DET 2 CO A REC & RET BN	IN
6101	MATVIYENKA FINUS	Awaiting Phase 2	No Issues	20120621	HHC 2ND BN 151ST INF	25U	No Phase	INDD	DET 1 CO C REC & RET BN	IN
6162	FLATLEY JEFFIE	Awaiting Phase 2	No Issues	20120614	844 HORIZONTAL EN CO (-)	68W	No Phase	LABK	DET 3 CO C (RSP) LA R&R BN	LA
6178	RINGANG COURTNEY	Awaiting Phase 2	No Issues	20120705	815TH ENGR CO (HORZ) (-)	91B	No Phase	NDBA	DET 2, NDARNG REC & RET BN	ND
6202	BOSVELD LATRICE	Awaiting Phase 2	No Issues	20120828	CO C (ENG) 81ST BSTB	12B	No Phase	WABI	D2, CO A, RECRUIT & RETEN BN	WA
5461	BULLOCK CANDIDA	Awaiting Phase 2	No Issues	20120726	CO A 1-145TH AR RGT	92Y	No Phase	OHCF	CO E REC & RET DIV	OH
5465	PACHECOCARDONA HEIDI	Awaiting Phase 2	No Issues	20120705	252ND (-) ORDNANCE COMPANY	91H	No Phase	INDH	DET 1 CO C REC & RET BN	IN
6661	WEACHTER	Awaiting	No Issues	20120809	1460 TC COMPANY	88M	No Phase	MIBG	DET 8 MI ARNG	MI

2. Select the check box in the first column for each Soldier you wish to acknowledge has been assigned to your RSP Site.
3. Click **ACKNOWLEDGE RSP ASSIGNMENT**.
   - The selected case(s) are moved to the *Sponsorship Tasks Incomplete* work bucket.

> **Note -** The third and fourth panels are read-only while the Soldier is in the *Pending RSP Acknowledgment* work bucket.

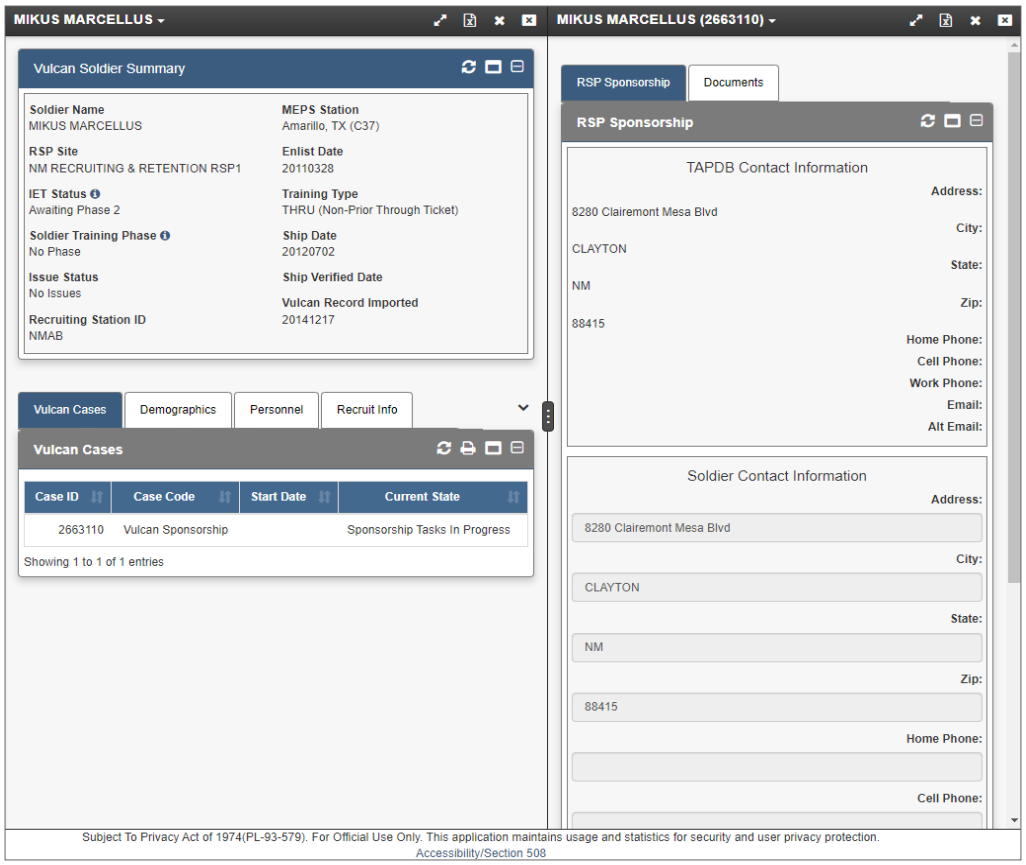
8.1.3 Sponsorship Tasks Incomplete

1. Click the **Sponsorship Tasks Incomplete** work bucket.
   - The *Sponsorship Tasks Incomplete* Case Roster loads in the second panel.

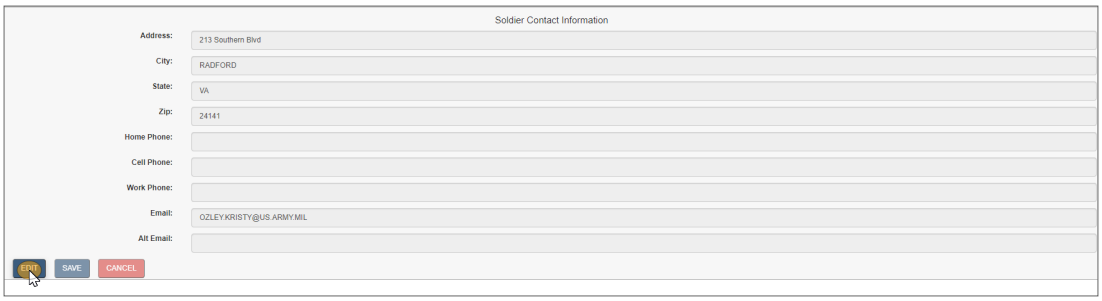


2. Select a case from the Case Roster.

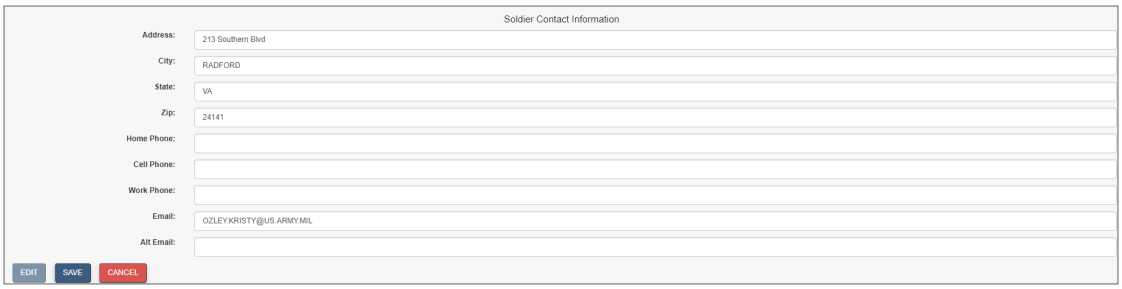
- Soldier Details open in the third panel. Case Details open in the fourth panel.



3. Optionally, click **EDIT** in panel 4's *Soldier Contact Information* section.



4. Edit the contact information as needed.



5. Click **SAVE**.

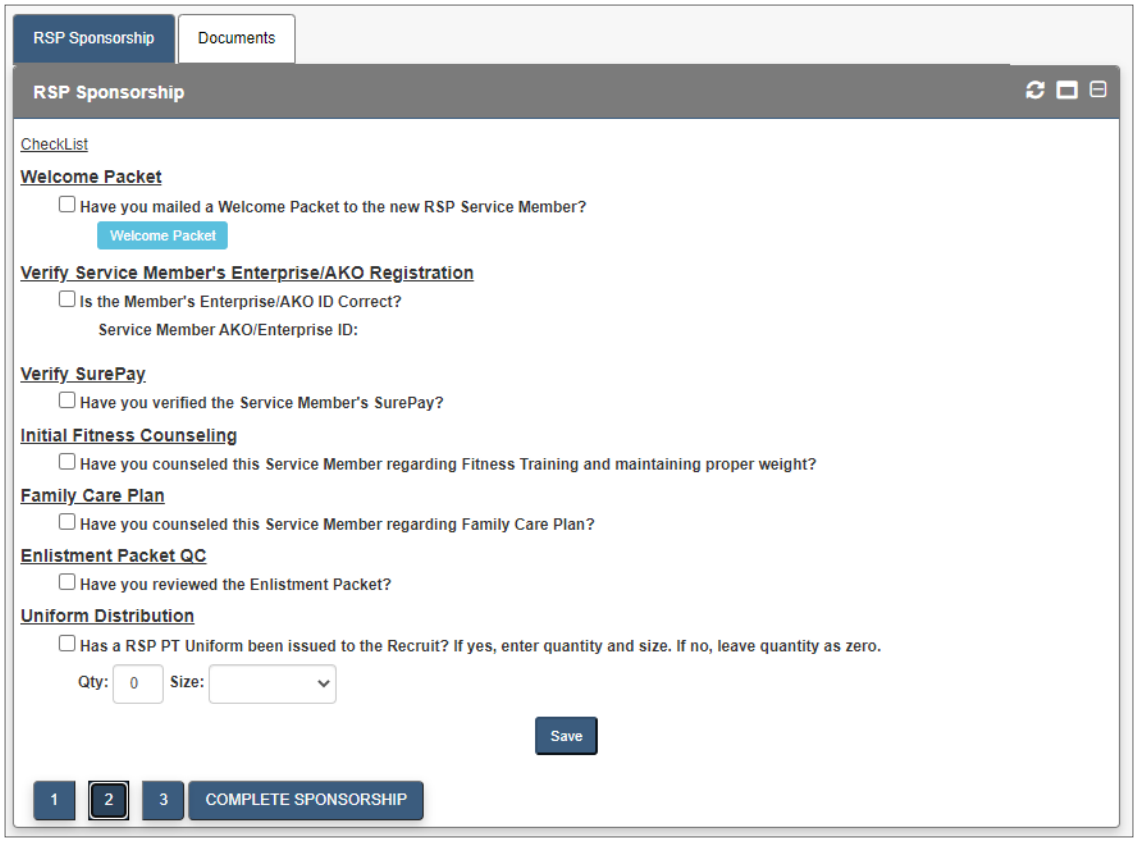
> **Tip -** Click **Cancel** to exit the edit screen.

6. Your edits appear in the *Soldier Contact Information* section.

> **Note -** You can also edit contact information for a primary and alternate contact in the *Family Contact* tab in the third panel. This information also appears in the third-panel *Contact Info* tab when saved.

7. Click **VALIDATE** at the bottom of the *RSP Sponsorship* tab to validate the Soldier's contact information.

   ▶ The screen is refreshed to the *RSP Sponsorship* checklist.



> **Note -** Scroll down to see all options.

8. Select the check boxes as they are completed.
9. Click **Save** to save any changes.
10. When the checklist is complete, click **COMPLETE SPONSORSHIP**.

- A warning message appears.

11. Click **OK**.
12. The case is closed and a new case is created for the Soldier in the *In-Progress* work bucket under the *RSP Routine Monitoring* folder to track tasks that must be accomplished during monthly drills at the RSP Site.

8.1.4 Sponsorship Tasks Overdue

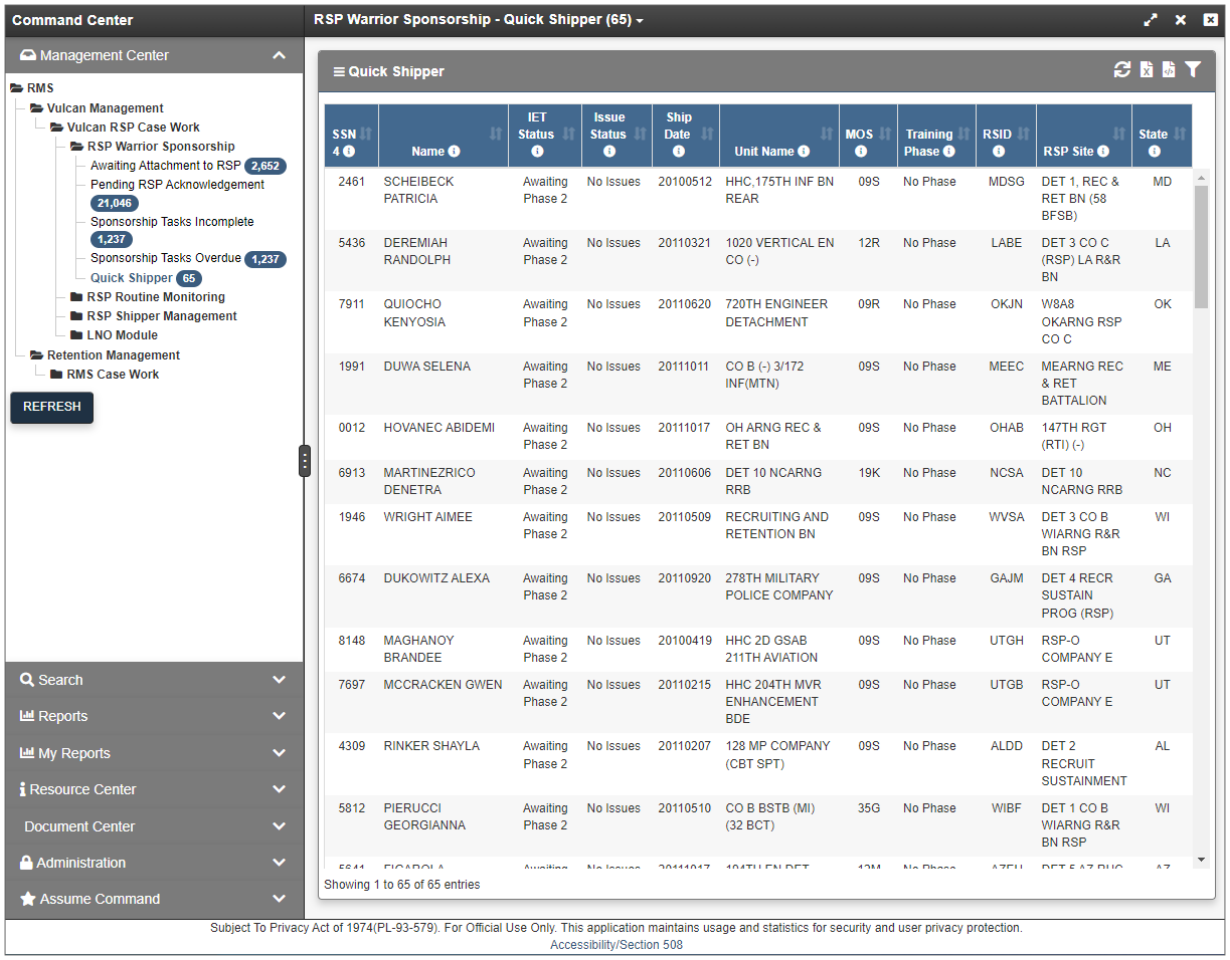
Cases are copied to the *Sponsorship Tasks Overdue* work bucket when 45 days have elapsed since the Soldier enlisted. The RSP Warrior Sponsorship case can be completed from either work bucket. See **Sponsorship Tasks Incomplete** on page 125 for more information.

8.1.5 Quick Shipper

Cases are moved to the *Quick Shipper* work bucket when Soldiers are shipping to training within 45 days of their enlistment date.

To complete an RSP Warrior Sponsorship case in the *Quick Shipper* work bucket:

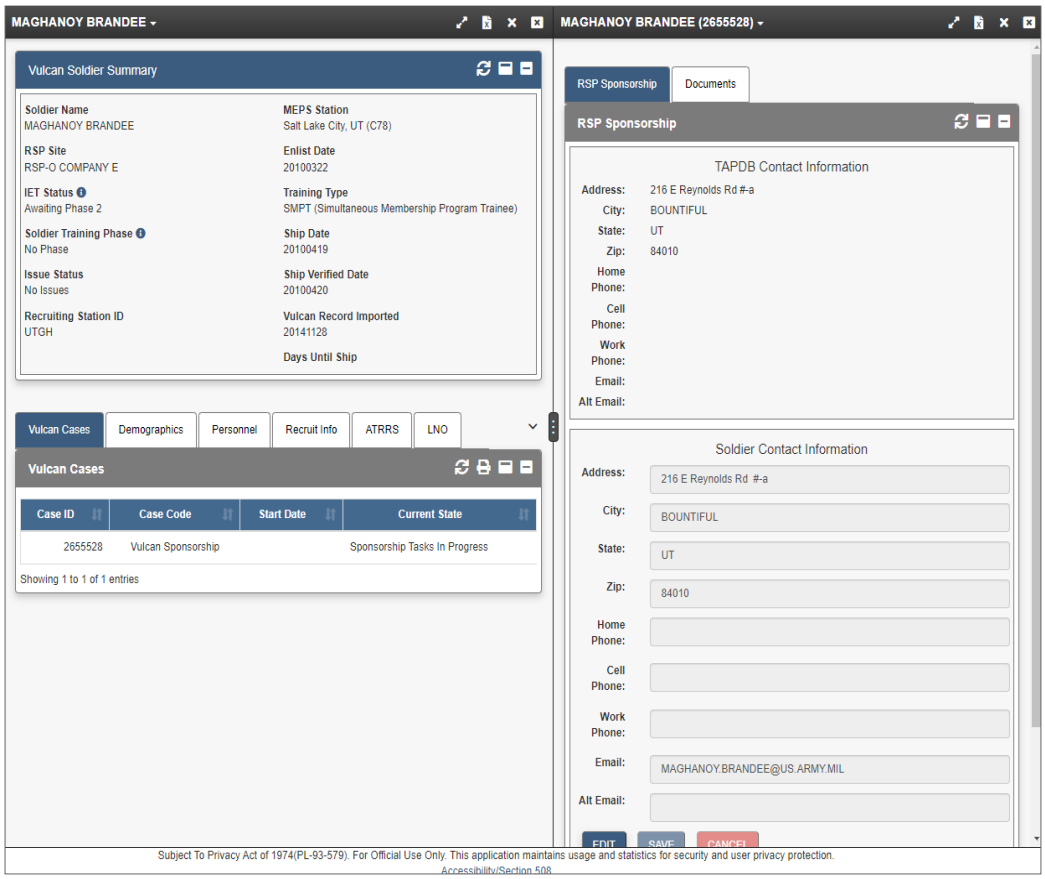
1. Click the **Quick Shipper** work bucket.
   - The *Quick Shipper* Case Roster loads in the second panel.



SSN 4	Name	IET Status	Issue Status	Ship Date	Unit Name	MOS	Training Phase	RSID	RSP Site	State
2461	SCHEIBECK PATRICIA	Awaiting Phase 2	No Issues	20100512	HHC,175TH INF BN REAR	09S	No Phase	MDSG	DET 1, REC & RET BN (58 BFSB)	MD
5436	DEREMIAH RANDOLPH	Awaiting Phase 2	No Issues	20110321	1020 VERTICAL EN CO (-)	12R	No Phase	LABE	DET 3 CO C (RSP) LA R&R BN	LA
7911	QUIOCHO KENYOSIA	Awaiting Phase 2	No Issues	20110620	720TH ENGINEER DETACHMENT	09R	No Phase	OKJN	W8A8 OKARNG RSP CO C	OK
1991	DUWA SELENA	Awaiting Phase 2	No Issues	20111011	CO B (-) 3/172 INF(MTN)	09S	No Phase	MEEC	MEARNG REC & RET BATTALION	ME
0012	HOVANEC ABIDEMI	Awaiting Phase 2	No Issues	20111017	OH ARNG REC & RET BN	09S	No Phase	OHAB	147TH RGT (RTI) (-)	OH
6913	MARTINEZRICO DENETRA	Awaiting Phase 2	No Issues	20110606	DET 10 NCARNG RRB	19K	No Phase	NCSA	DET 10 NCARNG RRB	NC
1946	WRIGHT AIMEE	Awaiting Phase 2	No Issues	20110509	RECRUITING AND RETENTION BN	09S	No Phase	WVSA	DET 3 CO B WIARNG R&R BN RSP	WI
6674	DUKOWITZ ALEXA	Awaiting Phase 2	No Issues	20110920	278TH MILITARY POLICE COMPANY	09S	No Phase	GAJM	DET 4 RECR SUSTAIN PROG (RSP)	GA
8148	MAGHANOY BRANDEE	Awaiting Phase 2	No Issues	20100419	HHC 2D GSAB 211TH AVIATION	09S	No Phase	UTGH	RSP-O COMPANY E	UT
7697	MCCRACKEN GWEN	Awaiting Phase 2	No Issues	20110215	HHC 204TH MVR ENHANCEMENT BDE	09S	No Phase	UTGB	RSP-O COMPANY E	UT
4309	RINKER SHAYLA	Awaiting Phase 2	No Issues	20110207	128 MP COMPANY (CBT SPT)	09S	No Phase	ALDD	DET 2 RECRUIT SUSTAINMENT	AL
5812	PIERUCCI GEORGIANNA	Awaiting Phase 2	No Issues	20110510	CO B BSTB (MI) (32 BCT)	35G	No Phase	WIBF	DET 1 CO B WIARNG R&R BN RSP	WI

2. Select a case from the Case Roster.

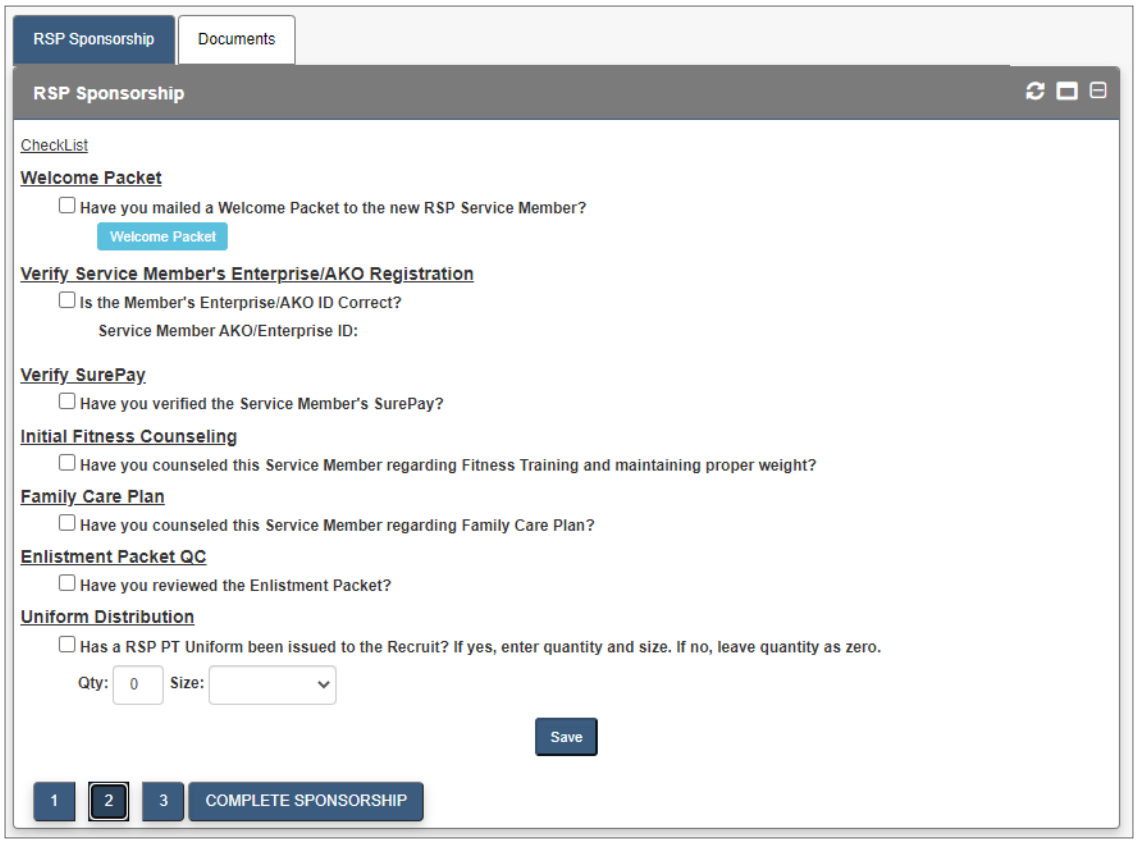
- Soldier Details open in the third panel. Case Details open in the fourth panel.



> **Note -** The case opens to the checklist on the second page of the fourth panel. Click **1** at the bottom of the screen to view and validate the Soldier's contact information if necessary.

3. Click **VALIDATE** at the bottom of the *RSP Sponsorship* tab to validate the Soldier's contact information.

▶ The screen is refreshed to the *RSP Sponsorship* checklist.



Note - Scroll down to see all options.

4. In the fourth panel *RSP Sponsorship Checklist*, select the check boxes as they are completed.
5. Click **Save** to save any changes.
6. Click **3** at the bottom of the fourth panel.

- The *Quickship Checklist* appears.

> **Note -** The *Quickship Checklist* includes items normally completed in the next stage of Vulcan—RSP Routine Monitoring.

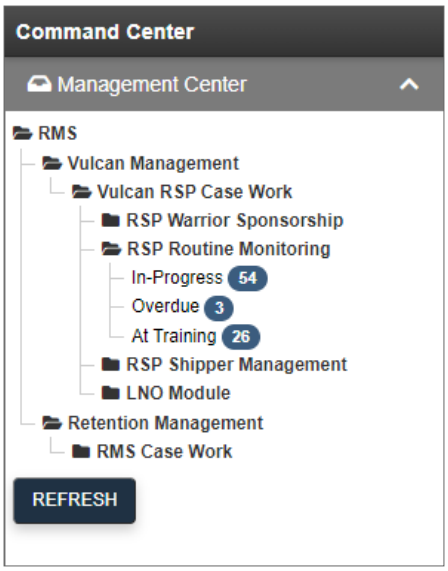
7. Select the check boxes as they are completed.
8. Click **SAVE** to save any changes.
9. When the checklist is complete, click **COMPLETE SPONSORSHIP**.
   - A warning message appears.

10. Click **OK**.
11. The case is closed and a new case is created for the Soldier in the *In-Progress* work bucket under the *RSP Routine Monitoring* folder to track tasks that must be accomplished during monthly drills at the RSP Site.

8.2 RSP Routine Monitoring

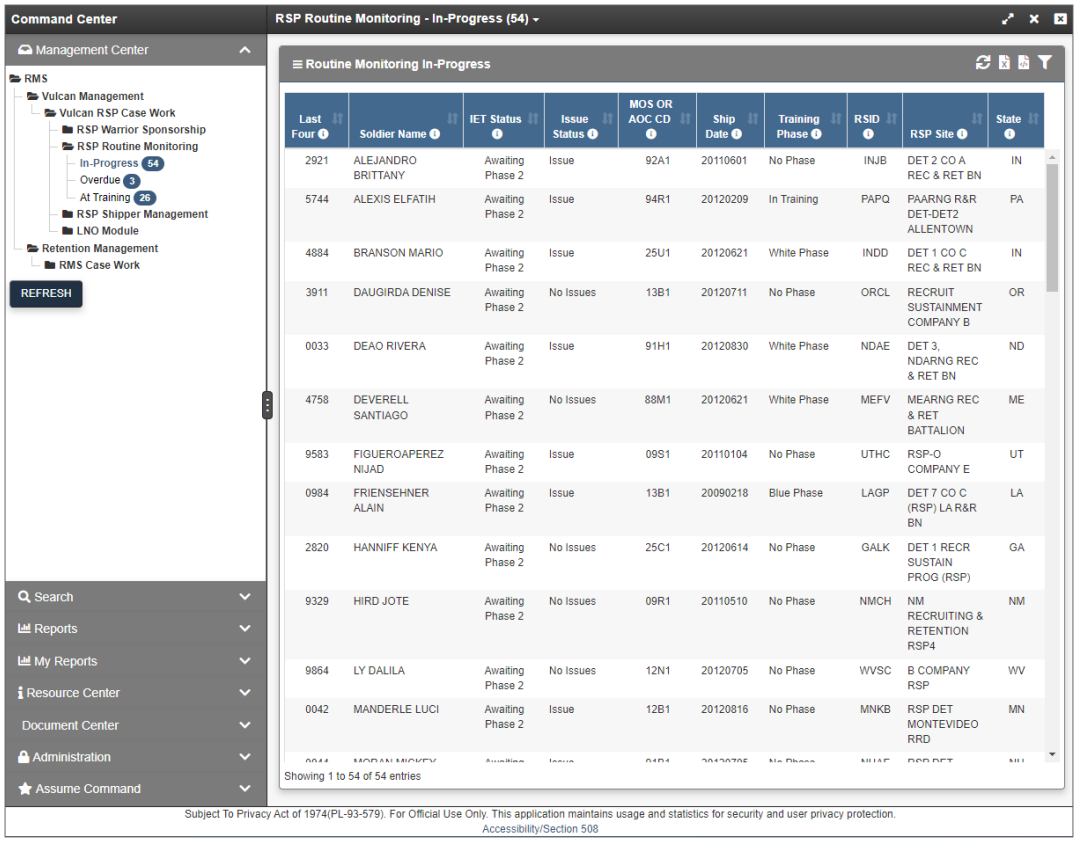
The second stage in the RSP process is completing the *RSP Routine Monitoring* case, which consists of tasks that are performed during monthly drills conducted at the RSP. Each *RSP Routine Monitoring* work bucket functions in the same way. (See **Work Buckets** on page 64 for descriptions of the work buckets.)

1. Within the *Command Center*, open the *Management Center* tab and expand the *RSP Routine Monitoring* folder within the *Vulcan RSP Case Work* folder.



2. Open any of the work buckets.

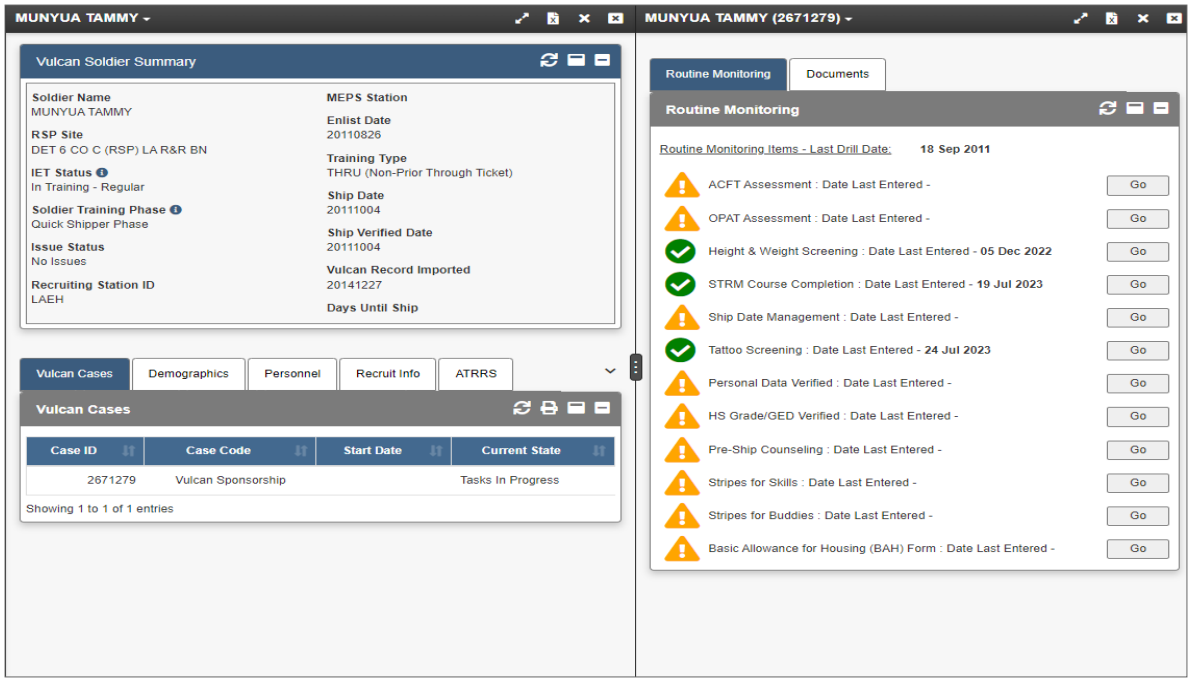
   ▶ The Case Roster loads in the second panel.



Last Four	Soldier Name	IET Status	Issue Status	MOS OR AOC CD	Ship Date	Training Phase	RSID	RSP Site	State
2921	ALEJANDRO BRITTANY	Awaiting Phase 2	Issue	92A1	20110601	No Phase	INJB	DET 2 CO A REC & RET BN	IN
5744	ALEXIS ELFATIH	Awaiting Phase 2	Issue	94R1	20120209	In Training	PAPQ	PAARNG R&R DET-DET2 ALLENTOWN	PA
4884	BRANSON MARIO	Awaiting Phase 2	Issue	25U1	20120621	White Phase	INDD	DET 1 CO C REC & RET BN	IN
3911	DAUGIRDA DENISE	Awaiting Phase 2	No Issues	13B1	20120711	No Phase	ORCL	RECRUIT SUSTAINMENT COMPANY B	OR
0033	DEAO RIVERA	Awaiting Phase 2	Issue	91H1	20120830	White Phase	NDAE	DET 3, NDARNG REC & RET BN	ND
4758	DEVERELL SANTIAGO	Awaiting Phase 2	No Issues	88M1	20120621	White Phase	MEFV	MEARNG REC & RET BATTALION	ME
9583	FIGUEROAPEREZ NIJAD	Awaiting Phase 2	Issue	09S1	20110104	No Phase	UTHC	RSP-O COMPANY E	UT
0984	FRIENSEHNER ALAIN	Awaiting Phase 2	Issue	13B1	20090218	Blue Phase	LAGP	DET 7 CO C (RSP) LA R&R BN	LA
2820	HANNIFF KENYA	Awaiting Phase 2	No Issues	25C1	20120614	No Phase	GALK	DET 1 RECR SUSTAIN PROG (RSP)	GA
9329	HIRD JOTE	Awaiting Phase 2	No Issues	09R1	20110510	No Phase	NMCH	NM RECRUITING & RETENTION RSP4	NM
9864	LY DALILA	Awaiting Phase 2	No Issues	12N1	20120705	No Phase	WVSC	B COMPANY RSP	WV
0042	MANDERLE LUCI	Awaiting Phase 2	Issue	12B1	20120816	No Phase	MNKB	RSP DET MONTEVIDEO RRD	MN

3. Select a case from the Case Roster.

   ▶ Soldier Details and Case Details open in the third and fourth panels.



The fourth panel *Routine Monitoring Items* link to screens containing tasks to complete throughout the Soldier's Routine Monitoring case.

> **Note -** A circled check mark icon beside an item indicates the task requirements are up to date; an octagon icon indicates an issue or test failure; a triangle icon indicates tasks are incomplete. A previously completed task that needs to be done again reverts to the triangle icon.

8.2.1 Physical Assessment

The physical assessment portion is separated into three separate items:

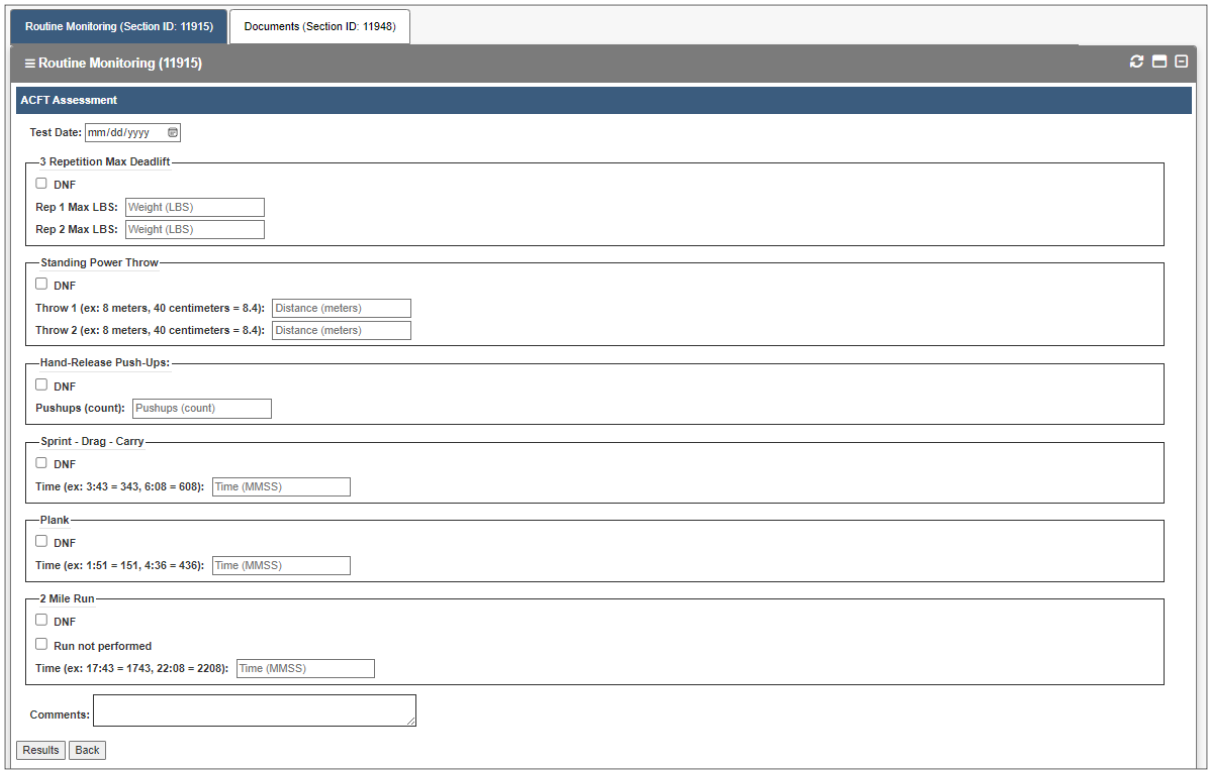
- ACFT Assessment
- OPAT Assessment
- Height & Weight Assessment

8.2.1.1 ACFT Assessment

The Army Combat Fitness Test (ACFT) assesses a Soldier's general physical fitness. It tests muscular strength, muscle endurance, power, speed, agility, coordination, flexibility, balance, reaction time, and aerobic capacity.

1. Click **Go** next to *ACFT Assessment* in the fourth panel *Routine Monitoring* tab.

▶ The *ACFT Assessment* screen loads.



> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

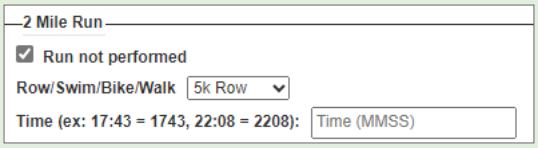
2. Click the **date picker** icon beside the *Test Date* field.

▶ A calendar pop-up appears.

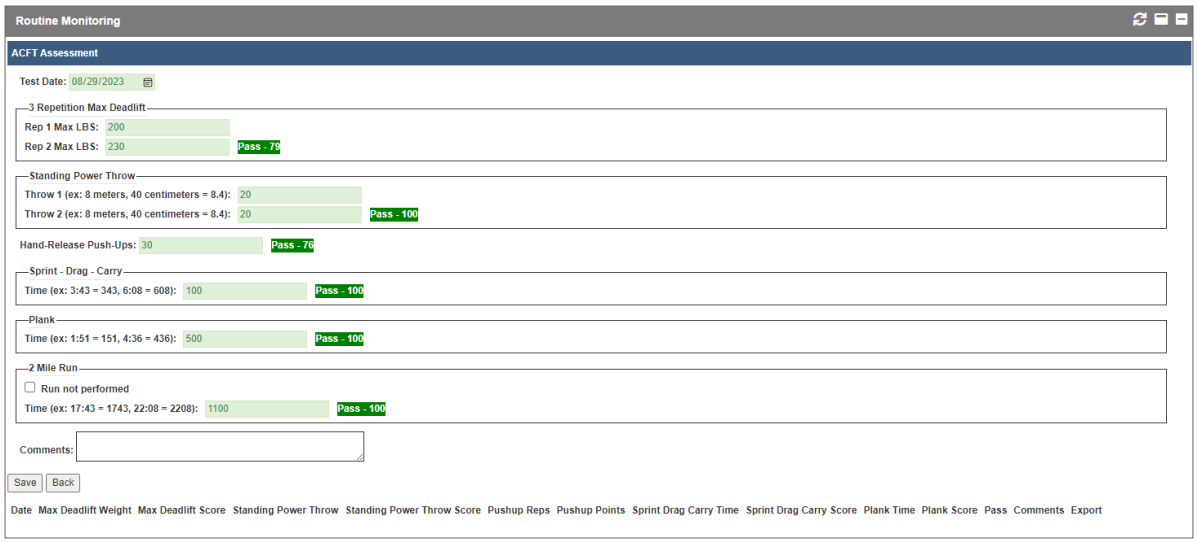
3. Select the *Test Date*.
4. Fill in the assessment fields. Optionally, enter comments in the provided field.

> **Tip -** If the Soldier was unable to complete the two-mile run, select the **Run not performed** check box. This results in test failure and an *ACFT/PT Assessment Failure* issue is created in the third-panel *Soldier Status* tab. For more information on Soldier Status, see **Soldier Status (Vulcan Cases Only)** on page 74.

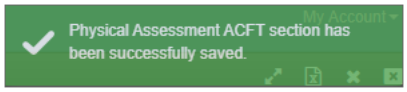
Note - If the *Run not performed* box is checked next to *2 Mile Run*, alternate fields (Row, Swim, Bike, Walk) appear.



5. Click **Results**.
   - The Soldier's test scores appear next to each field and the *Results* button becomes a *Save* button.



6. Click **Save**.
   - A confirmation box appears.



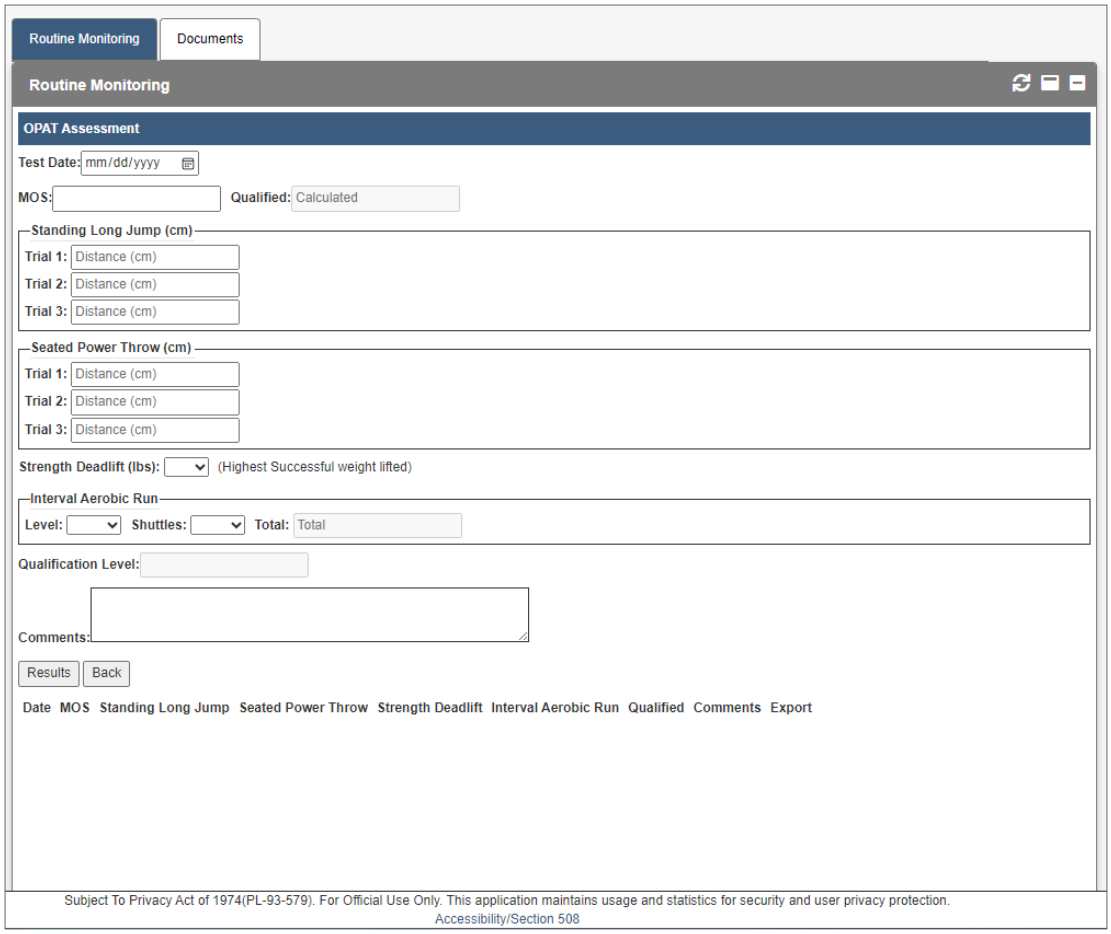
7. Click **Back** to return to the *Routine Monitoring Items* screen.

8.2.1.2 OPAT Assessment

The Occupational Physical Assessment Test (OPAT) evaluates the physical fitness and ability of recruits and cadet candidates to achieve the physical demand category required for entry into a given military occupational specialty or area of concentration.

1. Click **Go** next to *OPAT Assessment* in the fourth panel *Routine Monitoring* tab.

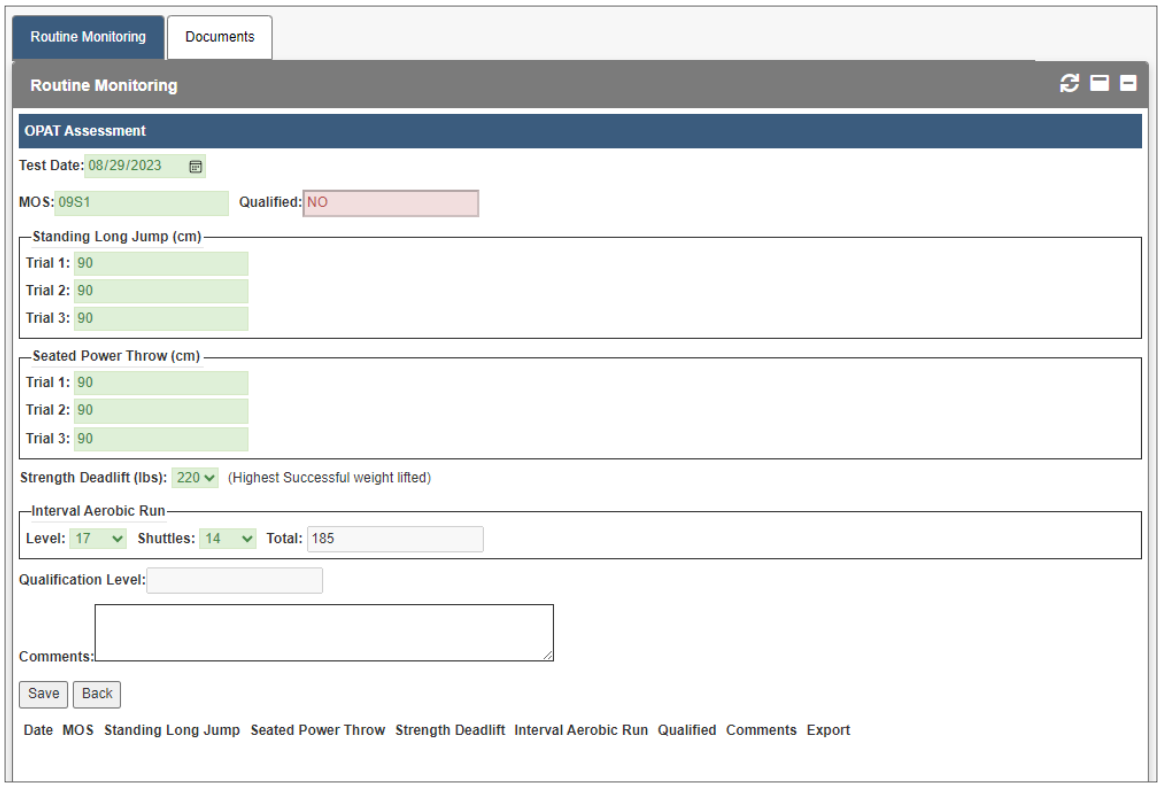
- The *OPAT Assessment* screen loads.



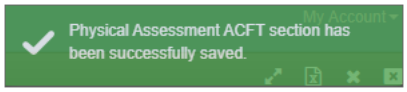
> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

2. Click the **date picker** icon beside the *Test Date* field.
   - A calendar pop-up appears.
3. Select the *Test Date*.
4. Enter your MOS in the provided field.
5. Fill in the assessment fields.
6. Click **Results**.

- The Soldier's test scores appear next to each field and the *Results* button becomes a *Save* button.



7. Click **Save**.
   - A confirmation box appears.



8. Click **OK**.
9. Click **Back** to return to the *Routine Monitoring Items* screen.

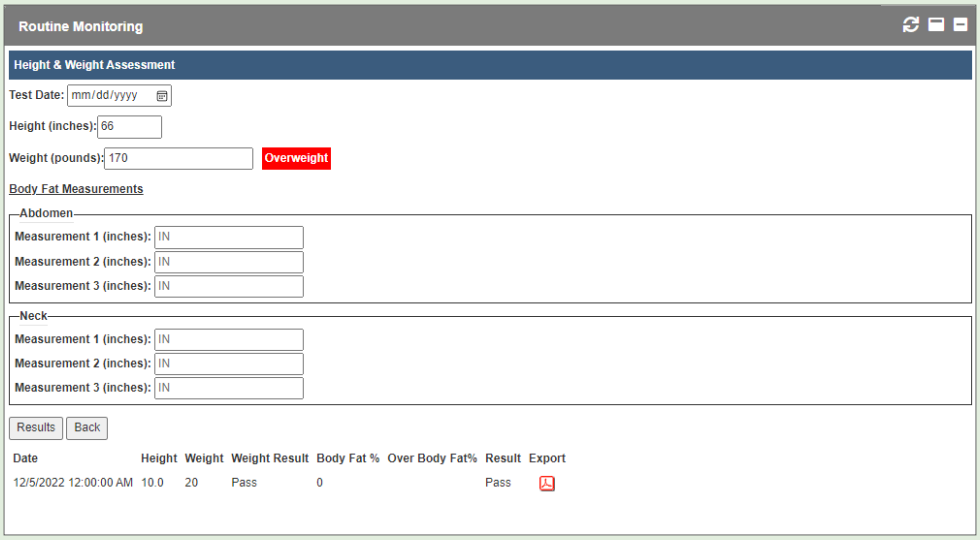
8.2.1.3 Height & Weight Screening

1. Click **Go** next to *Height & Weight Screening* in the fourth panel *Routine Monitoring* tab.

▶ The *Height & Weight Assessment* screen loads.

2. Click the **date picker** icon beside the *Test Date* field.
3. Select the *Test Date*.
4. Enter the correct number in inches in the *Height* field.
5. Enter the correct number in pounds in the *Weight* field.

Note - If the number entered in the *Weight* field is calculated as overweight, *Overweight* appears beside the field once the number is typed, and *Body Fat Measurements* appear below.

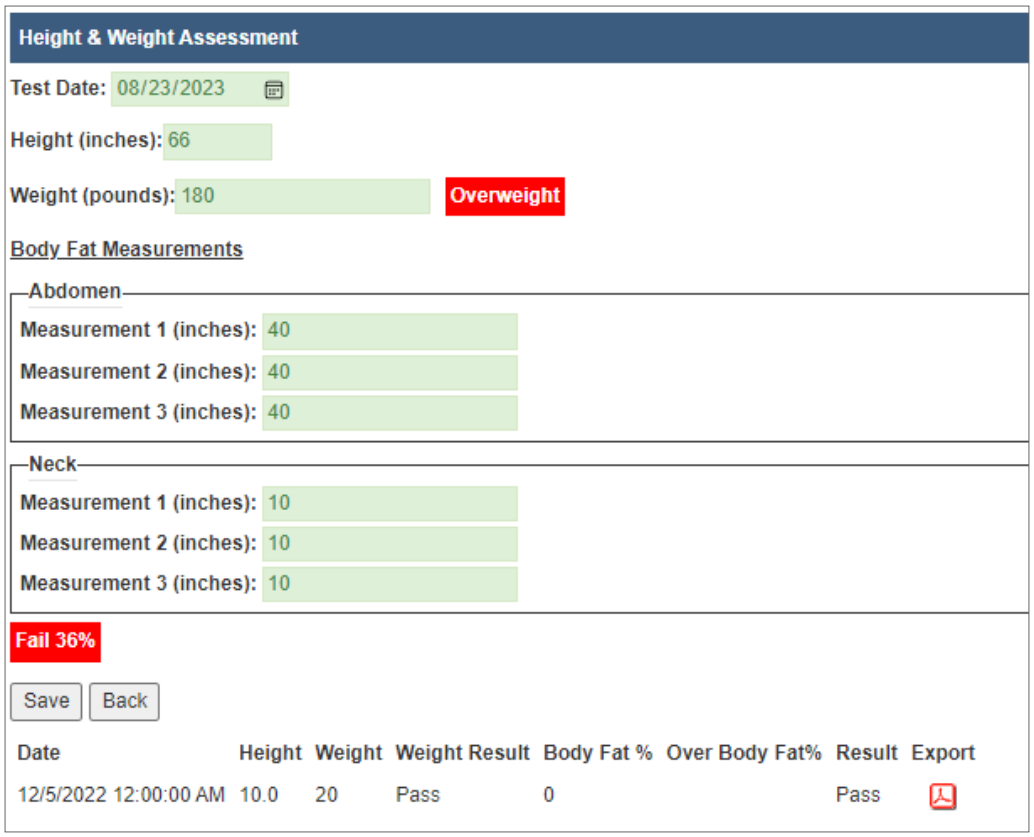


6. If *Overweight* is displayed, enter each measurement in the appropriate field:

a. Measure the Soldier's abdomen at the level of the navel and round down to the nearest 0.5 inch.
b. Repeat two more times.
c. Measure the Soldier's neck just below the level of the larynx and round up to the nearest 0.5 inch.
d. Repeat two more times.
e. For females, measure the Soldier's hips at the widest level and round down to the nearest 0.5 inch.
f. Repeat two more times.

7. Click **Results**.

▶ The *Pass* or *Fail* results are displayed, the body fat percentage appears next to the measurement fields, and the *Results* button becomes a *Save* button.

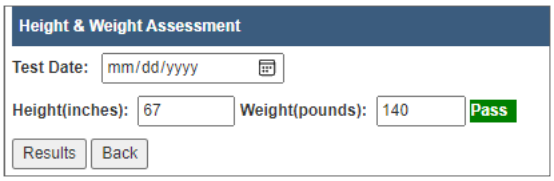


8. Click **Save**.

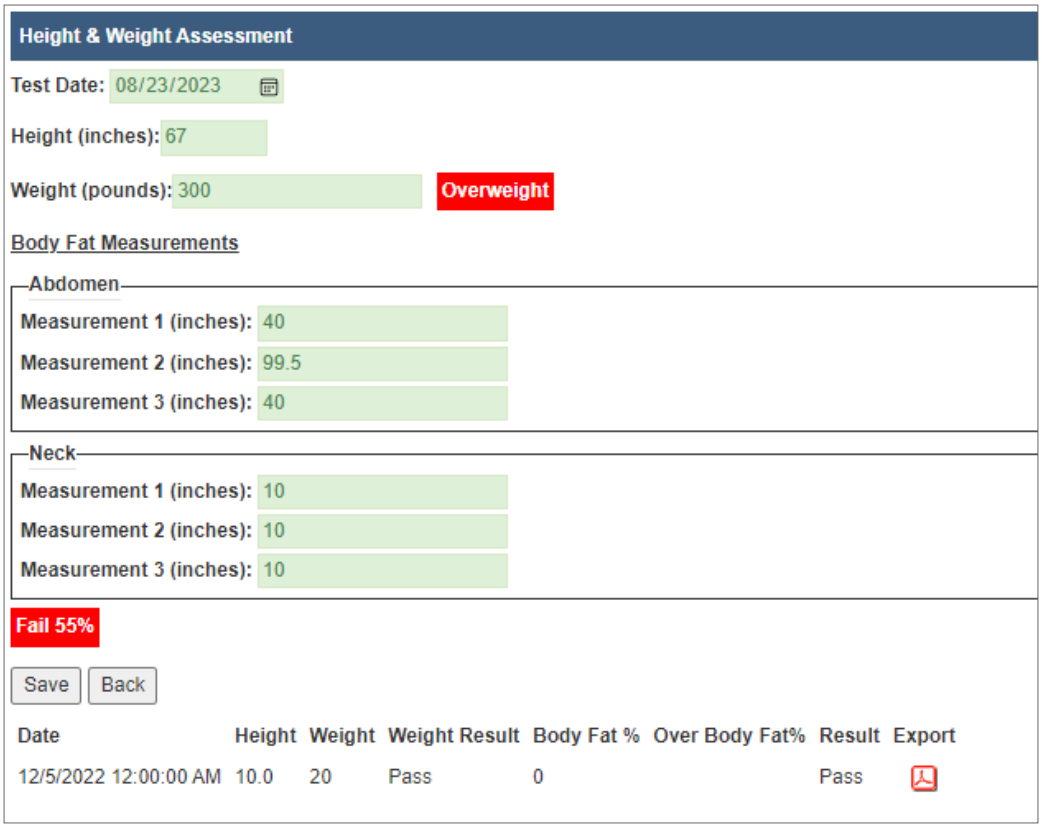
▶ A confirmation message appears.

9. If the Soldier passed, the Height and Weight Assessment results appear in the *Height & Weight*

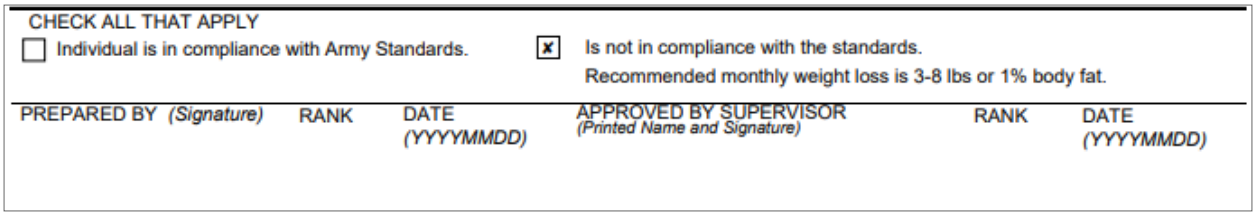
Assessment grid and *Pass* appears beside the *Weight* field.



10. If Body Fat Measurements were entered, *Pass* or *Fail* and the body fat percentage appears beside the Body Fat Measurements, and the Height and Weight Assessment results appear in the *Height & Weight Assessment* grid.



11. Click the **PDF** icon in the *Export* column to open a PDF of the Body Fat Content Worksheet (DA Form 5500 for males or DA Form 5501 for females) populated with the Soldier's test results.
12. Verify the information, save a copy, print, sign under *PREPARED BY*, and submit to your supervisor.



13. Click **Back** to return to the *Routine Monitoring Items* screen.

8.2.2 STRM Course Completion

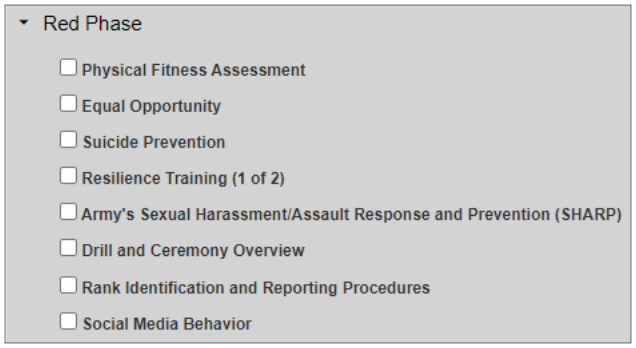
1. Click **Go** next to *STRM Course Completion* in the fourth panel *Routine Monitoring* tab.

2. The *STRM Course Completion* screen loads.

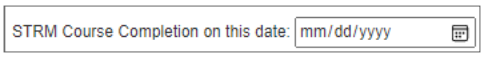
> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

> **Note -** See **STRM Course Completion Phases** on the next page for descriptions of the phases.

3. Expand **Red Phase**, if applicable.
   - The *Red Phase* checklist loads.



4. Select the check boxes as they are completed.
5. Enter the course completion date by clicking the **date picker** icon beside the *STRM Course Completion on this date* field at the bottom of the screen.



6. Click **Save**.
   - A confirmation message appears.

7. You are returned to the *Routine Monitoring Items* screen.
8. Repeat for the other phases during the allotted time.
9. Click **Back** to return to the *Routine Monitoring Items* screen.

8.2.2.1 STRM Course Completion Phases

See the table below for descriptions of the Soldier Training Readiness Modules (STRM) Course Completion phases for Routine Monitoring cases.

Phase	Description
White Phase	White Phase training is designed to train and test the Soldiers on basic skills required for success at Basic Combat Training.
Red Phase	Red Phase training is designed to be conducted during the Soldier's first two drills at the RSP.
Blue Phase	The Blue Phase provides Cadre with the opportunity to complete Soldier preparations for success at BCT.
Green Phase	The Green Phase is for split-path Soldiers who have completed Basic Training and are awaiting Advanced Individual Training.
Gold Phase	The Gold Phase is the final phase for returning MOSQ Soldiers and is also the final drill with the RSP before transitioning into their unit of assignment.
Quick Shipper Phase	Quick-Ship Soldiers have only one RSP Drill weekend prior to shipping to BCT, combining Red and Blue Phase functions.

Red Phase

1. Expand **Red Phase**, if applicable.
   - The *Red Phase* checklist loads.
   - ☐
2. Select the check boxes as they are completed.

White Phase

1. Expand **White Phase**, if applicable.
   - The *White Phase* checklist loads.
   - ☐
2. Select the check boxes as they are completed.

Blue Phase

1. Expand **Blue Phase**, if applicable.
   - The *Blue Phase* checklist loads.
   - ☐
2. Select the check boxes as they are completed.

Green Phase

1. Expand **Green Phase**, if applicable.
   - The *Green Phase* checklist loads.

2. Select the check boxes as they are completed.

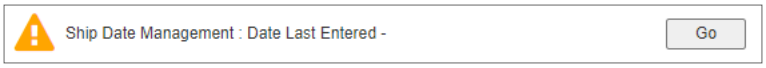
Gold Phase

1. Expand **Gold Phase**, if applicable.
   - The *Gold Phase* checklist loads.

2. Select the check boxes as they are completed.

8.2.3 Ship Date Management

1. Click **Go** next to *Ship Date Management* in the fourth panel *Routine Monitoring* tab.

2. The *Ship Date Management* screen loads.

   Tip - At any time, click **Back** to return to the *Routine Monitoring Items* screen.

   Note - Links to reference documents are available toward the bottom of the screen.

3. Change the first selection to **Yes** if the Soldier is fully ready to ship earlier than scheduled and has been counseled about the ship date.
   - The *What is the earliest Ship Date* and *Comments* fields are enabled.

4. Click the **date picker** icon.
5. Select the earliest Ship Date.
6. Enter comments in the *Comments* field.
7. After the Soldier has received Ship Date Counseling, click the **date picker** icon beside the *Ship Date Counseling occurred on this date* field.

8. Select the correct Ship Date Counseling date.
9. Click **Save**.
   - You are returned to the *Routine Monitoring Items* screen.

8.2.4 Tattoo Screening

1. Click **Go** next to *Tattoo Screening* in the fourth panel *Routine Monitoring* tab.

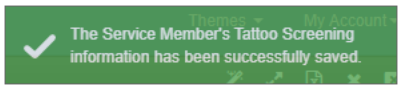
2. The *Tattoo Screening* window loads.

> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

3. Select **Does** or **Does Not** regarding whether the Service Member has tattoos that are either visible while wearing the Class A uniform, or are considered extremist, indecent, sexist or racist.

> **Note -** Click the **AR 670-1** and **SMOM 12024: Enlistment Eligibility Concerning Extremist Organizations, Gangs, Tattoos/brands, and Body Mutilations** links to view the Army Regulations regarding tattoos in a new window.

4. Click the **date picker** icon.
5. Select the date the Service Member was screened for prohibited tattoos.
6. Click **Save**.
   - A confirmation message appears.



7. You are returned to the *Routine Monitoring Items* screen.

> **Note -** An entry is recorded in the *Tattoo Screening* chart.

Screening Date	Violates Policy?
20220407	Does Not

8.2.5 Personal Data Verified

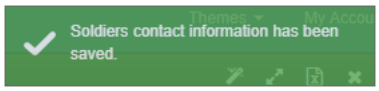
1. Click **Go** next to *Personal Data Verified* in the fourth panel *Routine Monitoring* tab.

   - The *Verify Personal Data* screen loads.

> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

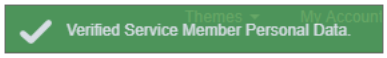
2. Click **Edit** in the *Soldier Contact Information* section.
   - The fields become editable.

3. Edit the contact information as needed.
4. Click **Save**.
   - A confirmation message appears.



5. Your edits appear in the *Soldier Contact Information* section.
6. Click the **date picker** icon beside the *Personal Data was verified on this date* field at the bottom of the screen.
7. Select the verification date.
8. Select **Yes** or **No** beside *Personal Data is correct?*

9. Click **Save**.
   - A confirmation message appears.



10. You are returned to the *Routine Monitoring Items* screen.

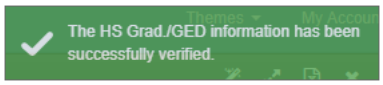
8.2.6 HS Grade/GED Verified

1. Click **Go** next to *HS Grade/GED Verified* in the fourth panel *Routine Monitoring* tab.

- The *Verify High School Degree or Completed GED* screen loads.

> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

2. Select the option that applies to the Service Member.
   - A **date picker** icon and field appears when one of the options is selected.
3. Click the **date picker** icon beside your selection.
4. Select the correct date.
5. Click the **date picker** icon beside the *Verification happened on this date* field.
6. Select the verification date.
7. Click **Save**.
   - A confirmation message appears.



8. You are returned to the *Routine Monitoring Items* screen.

8.2.7 Pre-Ship Counseling

1. Click **Go** next to *Pre-Ship Counseling* in the fourth panel *Routine Monitoring* tab.

   - The *Pre-Ship Counseling* screen loads.

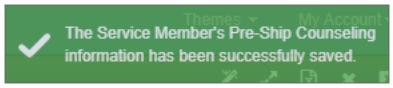
> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

2. Select **Yes** or **No** to answer the question, *Have you administered a Pre-Ship briefing to this Soldier?*

> **Note -** Click the links for **RSP Form 08-01**, **RSP Form 08-01-A**, and **RSP Form 08-02** to open the Army regulation documents in new windows.

3. Click the **date picker** icon beside the *Date of Counseling* field.
4. Select the counseling date.

5. Click **Save**.
   - A confirmation message appears.



6. You are returned to the *Routine Monitoring Items* screen.

8.2.8 Stripes for Skills

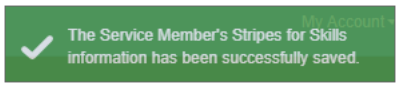
1. Click **Go** next to *Stripes for Skills* in the fourth panel *Routine Monitoring* tab.

   - The *Stripes For Skills* screen loads.

> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

2. Check the box next to the *Promote to E2* field.
   - A *date picker* icon appears in the *E2 Effective Date* field.

3. Click the **date picker** icon.
4. Select an appropriate date.
5. Click **Save**.
   - A confirmation message appears.



6. You are returned to the *Routine Monitoring Items* screen.

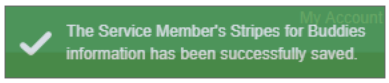
8.2.9 Stripes for Buddies

1. Click **Go** next to *Stripes for Buddies* in the fourth panel *Routine Monitoring* tab.

   - The *Stripes For Buddies* screen loads.

> **Tip -** At any time, click **Back** to return to the *Routine Monitoring Items* screen.

2. Check any applicable boxes.
   - A *date picker* icon appears in the *E2 Effective Date* field.
3. Click the **date picker** icon.
4. Select an appropriate date. Repeat this process as needed.
5. Click **Save**.
   - A confirmation message appears.



6. You are returned to the *Routine Monitoring Items* screen.

8.2.10 BAH Capture

1. Click **Go** next to *Basic Allowance for Housing (BAH) Form* in the fourth panel *Routine Monitoring* tab.

   - The *Basic Allowance for Housing (BAH) Form* opens in Panel 4.
2. Fill in the form with the appropriate information and click **Create PDF**.

- The BAH form is downloaded to your computer and opens in a new tab.

BASIC ALLOWANCE FOR HOUSING (BAH)
AUTHORIZATION AND DEPENDENCY DECLARATION
For use of this form, see AR 637-1. The proponent agency is DCS, G-1.

PRIVACY ACT STATEMENT

AUTHORITY: 37 USC 403, Basic allowance housing; Army Regulation 637-1, Army Military Compensation and Entitlement Policy.

PRINCIPAL PURPOSE: To start, adjust or terminate a Soldier's entitlement to basic allowance for housing (BAH) and to verify a Soldier's dependency status. For additional information see the System of Records Notice A0600-8-104 APS http://www.federalregister.gov/documents/2019/07/18/2019-15242/privacy-act-of-1974-system-of-records.

ROUTINE USES: To the Internal Revenue Service for tax purposes. To the U.S. Government Accountability Office for statistical management To the members of Congress for inquiries. To U.S. state courts and various law enforcement agencies by subpoena only.

DISCLOSURE: Voluntary; however, form will not be processed without your DoD ID for pay purposes and nondisclosure may result in discrepancies with your BAH.

1. Name *(Last, First, MI)*	2. DOD ID Number	3. Grade
ALEXIS, ELFATIH E		PFC

4. Member's Physical Address *(Street, City, State, and Zip Code)*	5. Duty Location *(Unit Location or City, State, and Zip Code)*
419 Eccles Ave POTTSTOWN, PA 19464	PAARNG R&R DET-DET2 ALLENTOWN

6. Effective Date Of Action

7. Type Of Action *(Select Only One)* ☐ Start ☐ Change ☐ Stop ☐ Recertify

8. BAH Type *(Select Only One)* ☐ With Dependents ☐ Without Dependents ☐ Differential

9. Marital Status *(Select Only One)* ☐ Single ☐ Married ☐ Divorced ☐ Legally Separated ☐ Widowed

10. Spouse's Name *(Last, First, MI)*

11. Spouse's Physical Address *(Street, City, State, and Zip Code)*

Has your spouse or former spouse ever served in a branch of the Uniformed Services? *(If Yes, complete blocks a, b, c & d)* ☐ YES ☐ NO

a. Spouse's DOD ID Number

b. Spouse's Branch Of Service

c. Date Spouse Last Entered Service

d. Date Spouse Last Separated Service

12. Other Dependent Information *(Children and Secondary Dependents)*. Additional Dependents Will Be Listed On Additional Forms

Name	Physical Address	Relationship	Date Of Birth	Custody	
				Physical	Legal

13. Certification of Dependent Support

____ Read and Initial: I understand that the legal purpose of a housing allowance on behalf of a dependent is to partially reimburse a Service Member for the expense of providing a private sector residence for the dependents when Government Quarters are not provided. I further understand that a housing allowance for a dependent is not a bonus merely for the technical status of being married or a parent.

____ Read and Initial: I understand that I am required to provide adequate support to those dependents on whose behalf I am receiving a housing allowance and if I fail to provide adequate support, the housing allowance that I received for that dependent will be recouped for nonsupport or inadequate support periods.

____ Read and Initial: I understand that a legal separation agreement, court decree, judgment, or order that does not state the dependent support amount, or absolves me of my dependent support responsibility, does not of itself affect my housing allowance. I further understand that if I am authorized a housing allowance on behalf of a dependent that I must contribute to my dependent's support in an amount that is not less than the applicable BAH-DIFF rate.

____ Read and Initial: I understand that if there is a court order or legal separation agreement stating the support amount, I must contribute to the dependent's support the amount specified therein, but in no case may the support payments be less than the applicable BAH-DIFF rate.

____ Read and Initial: I certify that I provide or am willing to provide adequate support to the above named dependents.

I certify ALL information regarding this authorization is correct. I will immediately notify the servicing Finance/Personnel Office of any changes in the information above, due to divorce, marriage, death, living in government quarters etc., which could affect my BAH entitlement.

IMPORTANT: Making a false statement or claim against the US Government is punishable by courts-martial. The penalty for willfully making a false claim or a false statement in connection with claims is a maximum fine of $10,000 or imprisonment for 5 years, or both.

14. Member's Signature	15. Date	16. Commander's Signature	17. Date

DA FORM 5960, JAN 2022 PREVIOUS EDITIONS ARE OBSOLETE. APD AEM v1.00ES

3. Alternatively, you can uncheck the *Create PDF* box if you do not want to generate a PDF.

☐ Create PDF

- The fields in the *Routine Monitoring* section disappear.

☐

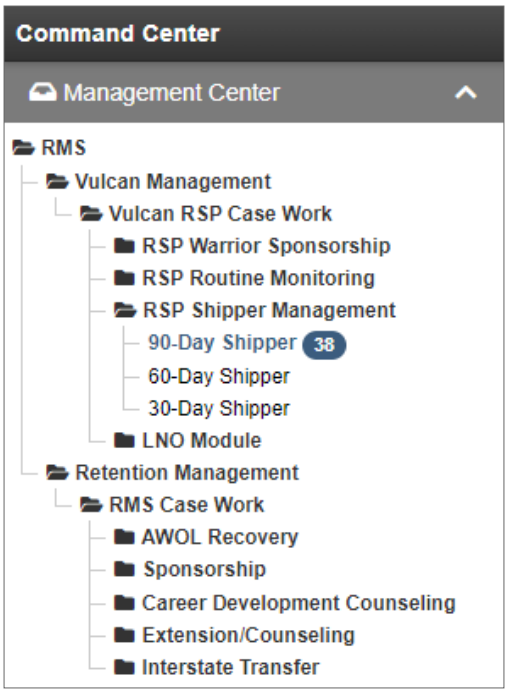
4. Click **Save** to verify the check instead of generating a PDF.

8.3 Shipper Management

The last stage in the RSP process is completing the *RSP Shipper Management* case, which ensures readiness tasks are performed as the Soldier nears his or her training ship date.

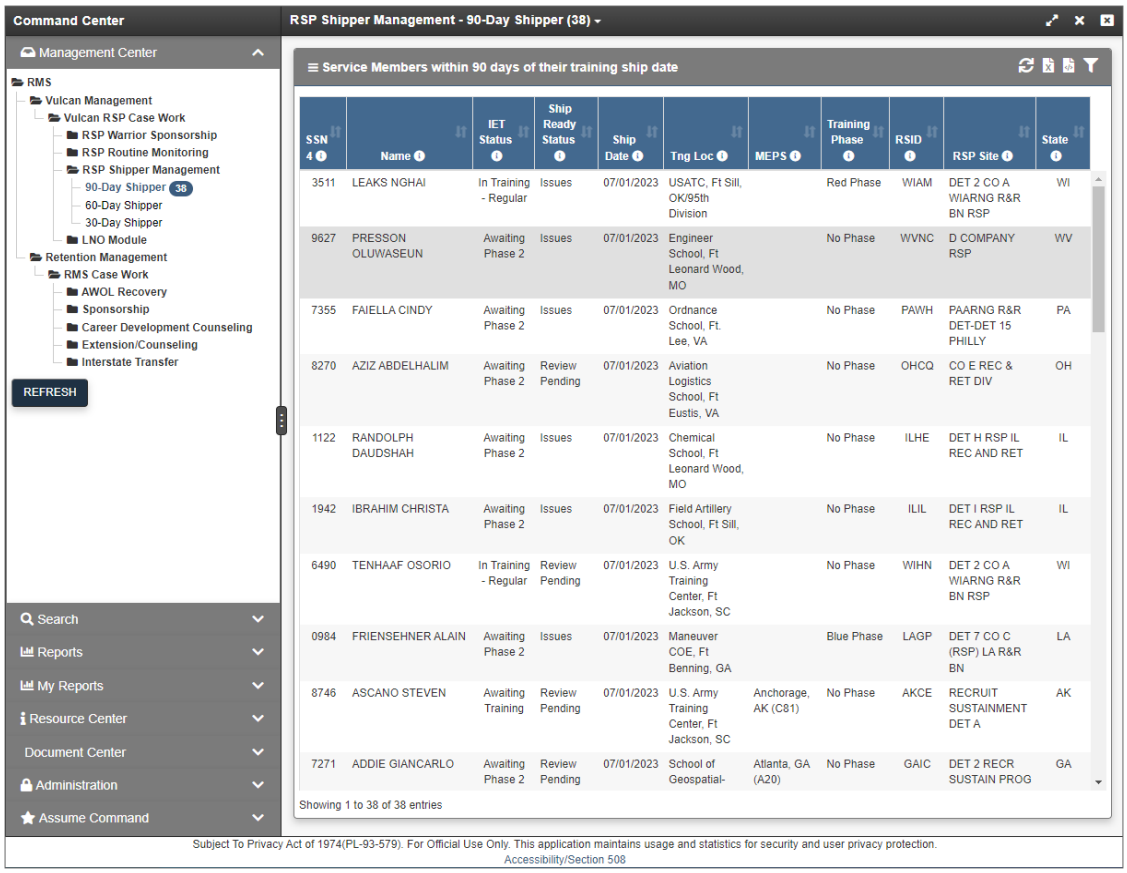
RSP Shipper Management work buckets correspond to time windows until the Soldier ships to training. Shipper Management input resulting in completion of RSP Form 08-02 is required in each applicable time window. Each *RSP Shipper Management* work bucket functions in the same way. (See **Work Buckets** on page 64 for descriptions of the work buckets.)

1. Within the *Command Center*, open the *Management Center* tab and expand the **RSP Shipper Management** folder within the *Vulcan RSP Case Work* folder.



2. Click one of the available work buckets.

- The Case Roster loads in the second panel.

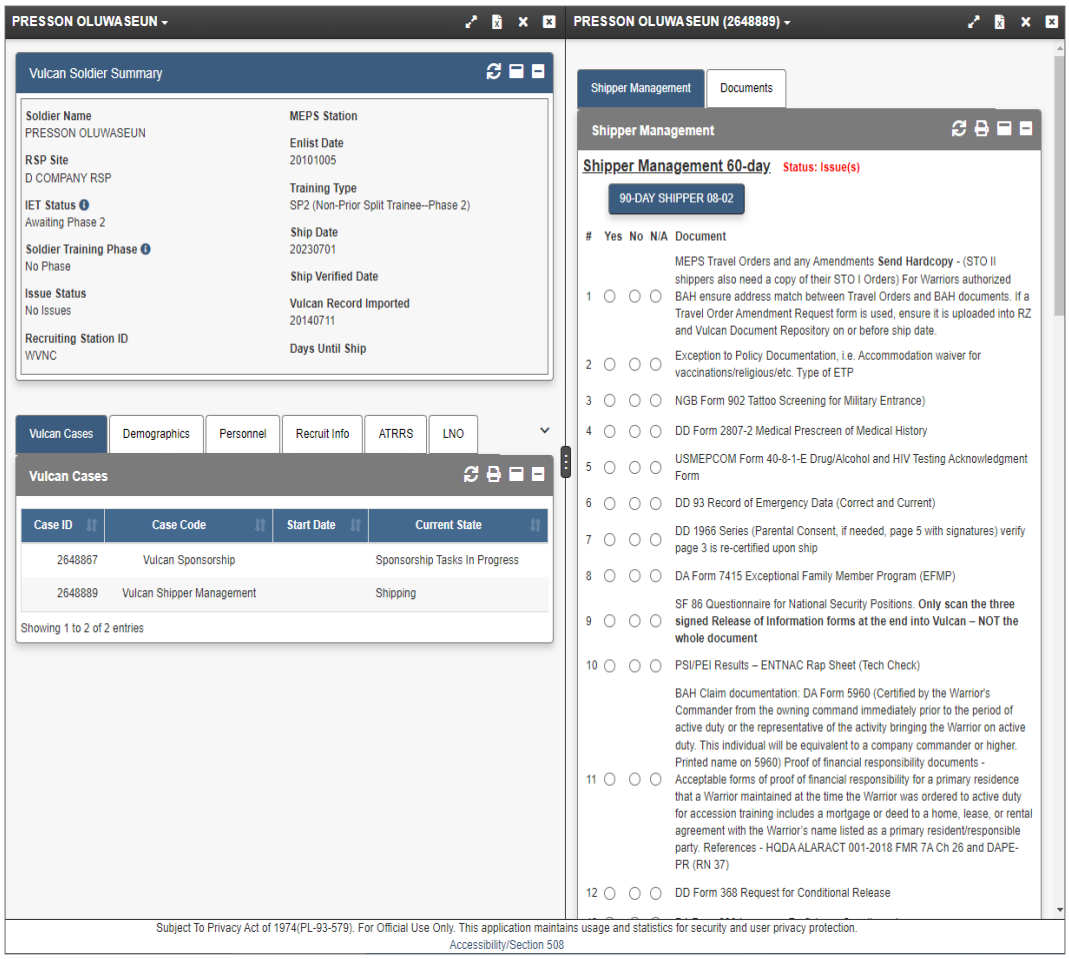


SSN 4	Name	IET Status	Ship Ready Status	Ship Date	Tng Loc	MEPS	Training Phase	RSID	RSP Site	State
3511	LEAKS NGHAI	In Training - Regular	Issues	07/01/2023	USATC, Ft Sill, OK/95th Division		Red Phase	WIAM	DET 2 CO A WIARNG R&R BN RSP	WI
9627	PRESSON OLUWASEUN	Awaiting Phase 2	Issues	07/01/2023	Engineer School, Ft Leonard Wood, MO		No Phase	WVNC	D COMPANY RSP	WV
7355	FAIELLA CINDY	Awaiting Phase 2	Issues	07/01/2023	Ordnance School, Ft. Lee, VA		No Phase	PAWH	PAARNG R&R DET-DET 15 PHILLY	PA
8270	AZIZ ABDELHALIM	Awaiting Phase 2	Review Pending	07/01/2023	Aviation Logistics School, Ft Eustis, VA		No Phase	OHCQ	CO E REC & RET DIV	OH
1122	RANDOLPH DAUDSHAH	Awaiting Phase 2	Issues	07/01/2023	Chemical School, Ft Leonard Wood, MO		No Phase	ILHE	DET H RSP IL REC AND RET	IL
1942	IBRAHIM CHRISTA	Awaiting Phase 2	Issues	07/01/2023	Field Artillery School, Ft Sill, OK		No Phase	ILIL	DET I RSP IL REC AND RET	IL
6490	TENHAAF OSORIO	In Training - Regular	Review Pending	07/01/2023	U.S. Army Training Center, Ft Jackson, SC		No Phase	WIHN	DET 2 CO A WIARNG R&R BN RSP	WI
0984	FRIENSEHNER ALAIN	Awaiting Phase 2	Issues	07/01/2023	Maneuver COE, Ft Benning, GA		Blue Phase	LAGP	DET 7 CO C (RSP) LA R&R BN	LA
8746	ASCANO STEVEN	Awaiting Training	Review Pending	07/01/2023	U.S. Army Training Center, Ft Jackson, SC	Anchorage, AK (C81)	No Phase	AKCE	RECRUIT SUSTAINMENT DET A	AK
7271	ADDIE GIANCARLO	Awaiting Phase 2	Review Pending	07/01/2023	School of Geospatial-	Atlanta, GA (A20)	No Phase	GAIC	DET 2 RECR SUSTAIN PROG	GA

> **Note -** *Ship Ready Status* column values change based on input in Shipper Management. Values include: *Review Pending*, *No Issues*, and *Issues*.

3. Select a case from the Case Roster.

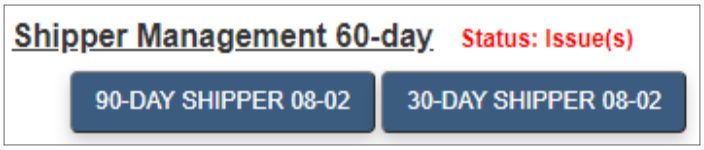
- Soldier Details open in the third panel. The Shipper Management tab opens in the fourth panel.

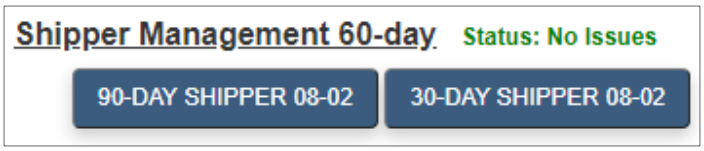


4. Select **Yes**, **No**, or **N/A** for each document listed in the *Shipper Management* tab to indicate whether the document is included in the Soldier's files.
   - Your selections auto-populate RSP Form 08-02, which lists the same documents as listed on the *Shipper Management* tab.
5. Scroll down to the bottom of the screen and click **Save** to save your progress.

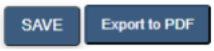
> **Note -** Any *No* input results in a status of *Shipper Issue(s)*.
> A confirmation message appears.
>
>
>

6. The status at the top of the screen is updated to either *No Issues* or *Issue(s)*.





7. When finished, click **EXPORT TO PDF** at the bottom of the screen.



8. The *RSP Recruit Pre-Ship Packet Checklist Hardcopy Documents* file is downloaded to your Downloads folder.
9. Upload the *RSP 08-02* form to the documents repository in the *Documents* tab. (See **Documents** on page 186 for more information.)

8.4 LNO Module

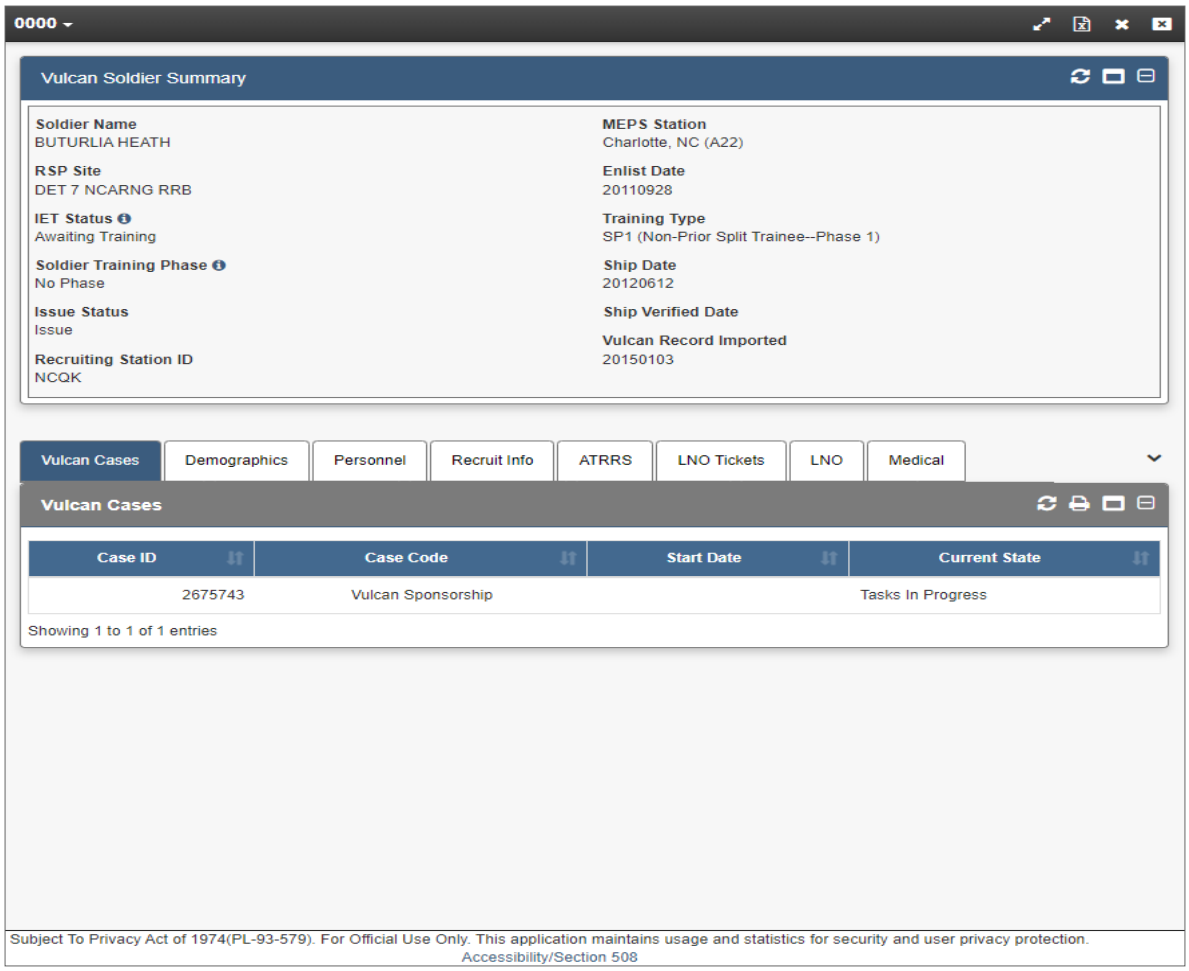
The LNO Module provides for the communication and resolution of issues that may arise while a Soldier is at training. ARNG Training Liaison Officers (LNO) can create LNO tickets in Vulcan, which the state and/or detachment RSP respond to, in order to have the issues resolved as quickly as possible.

8.4.1 Create an LNO Ticket

Only users with the LNO role can create LNO tickets.

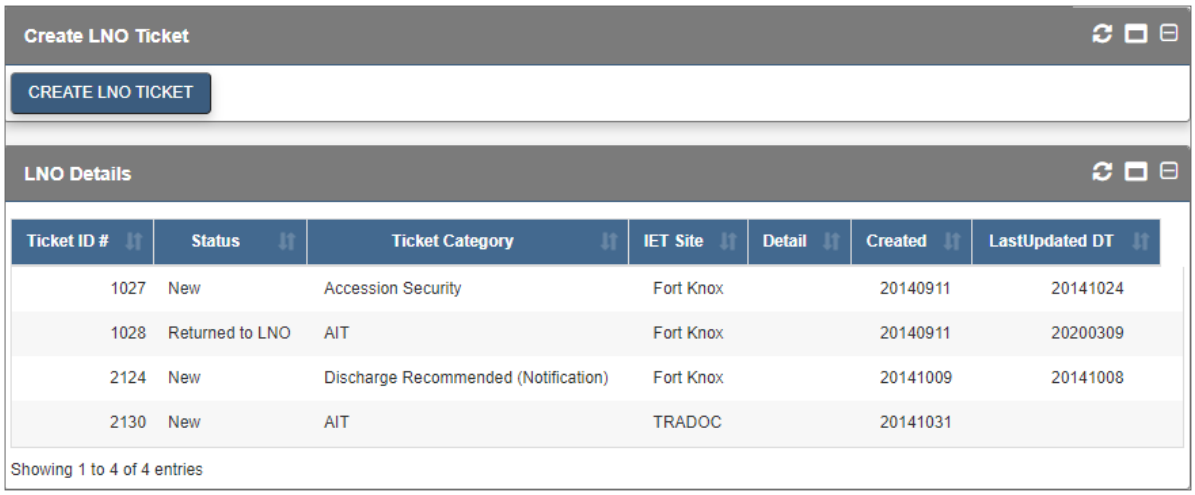
1. Search for a Soldier who requires an LNO ticket. (See **Vulcan Soldier Search** on page 203.)
2. Select a Soldier from the Search Results panel.

- The Soldier Details panel opens.



3. Click the **LNO** tab.

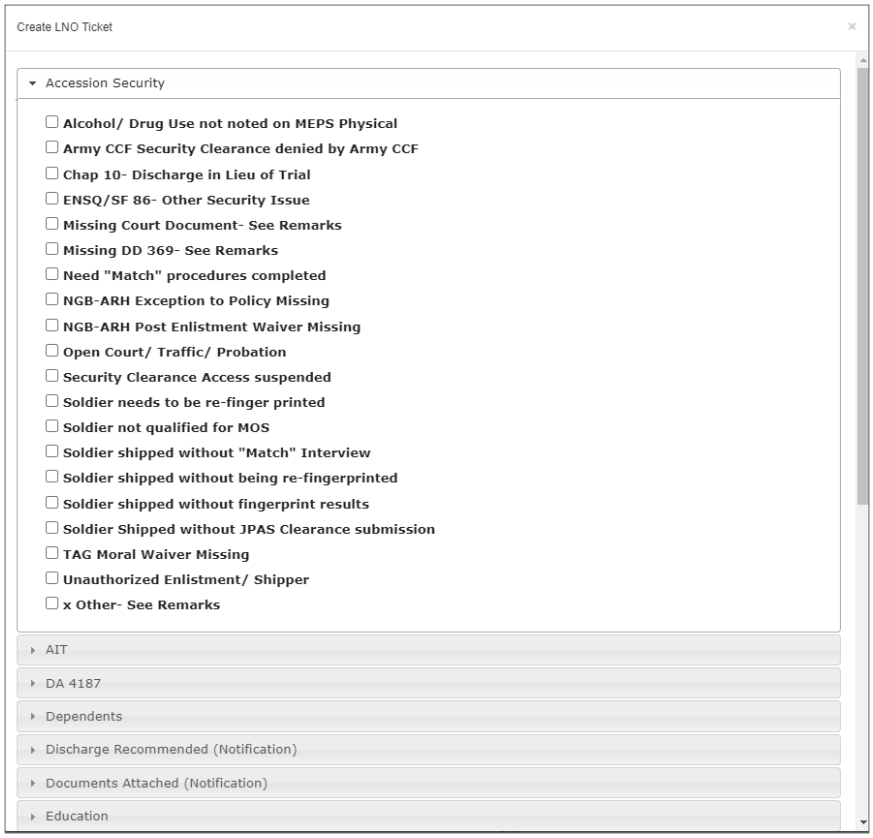
- The *LNO* tab opens.



Note - Any previous LNO tickets are displayed in the *LNO Details* section.

4. Click **CREATE LNO TICKET**.

   ▶ The *Create LNO Ticket* screen opens in a new window.



Note - Scroll down to see all options. Categories followed by *(Notification)*, such as *Discharge Recommended (Notification)*, are for communication only and do not necessarily indicate a problem.

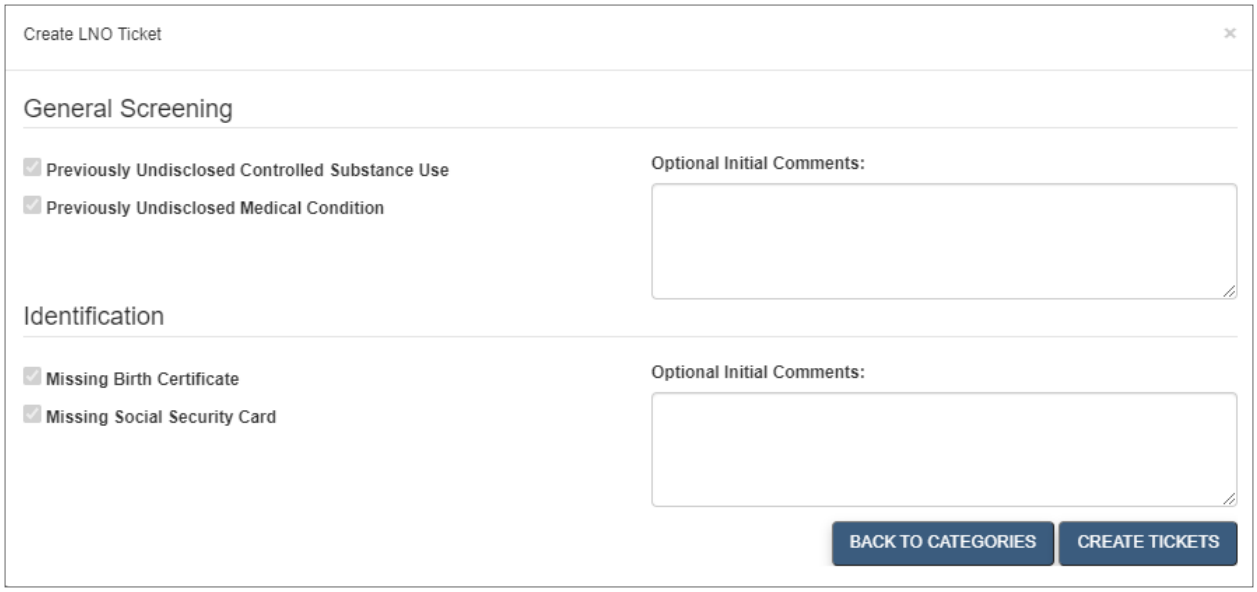
Note - You can create custom categories/subcategories for LNO Tickets from the *Administration* blade. See **Category Manager** on page 255

5. Click the ▸ icon to expand each category and view the detail-ticket reasons within each category.

6. Select the check box of each item that applies to the Soldier.

Note - A separate ticket is created for each LNO category that has items selected.

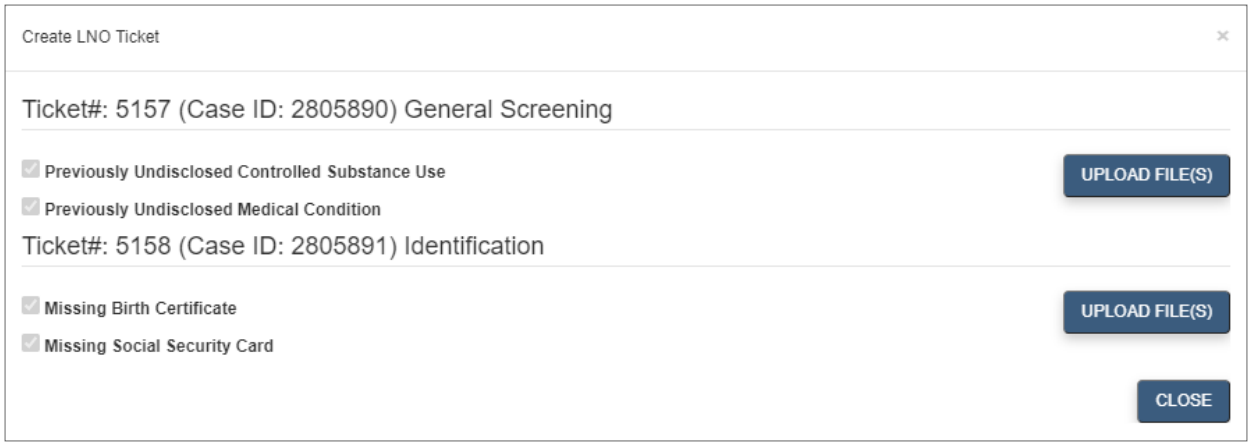
7. Click **SUBMIT CATEGORIES** at the bottom of the screen.
   - The panel refreshes to display your selections separated by category.



8. Optionally, add comments to each section in the *Optional Initial Comments* field(s).

Tip - Click **Back to Categories** to edit your selections.

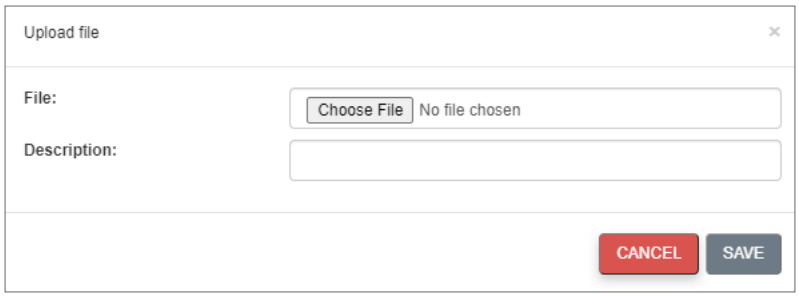
9. Click **CREATE TICKETS**.
   - The panel refreshes to display the new ticket(s).



Note - An email notification is sent to each state user listed in the *State Email Config* editor for each new ticket created. State admin users can add and remove email addresses to receive new LNO ticket emails. (See **State Email Config** on page 1 for more information.)

10. Optionally, click **UPLOAD FILE(S)** to upload any supporting documents.

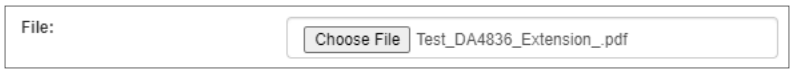
- The *Upload file* window opens.



11. Click **Choose File**.
12. Navigate to the folder in your documents that contains the file(s) supporting the issue in the ticket.

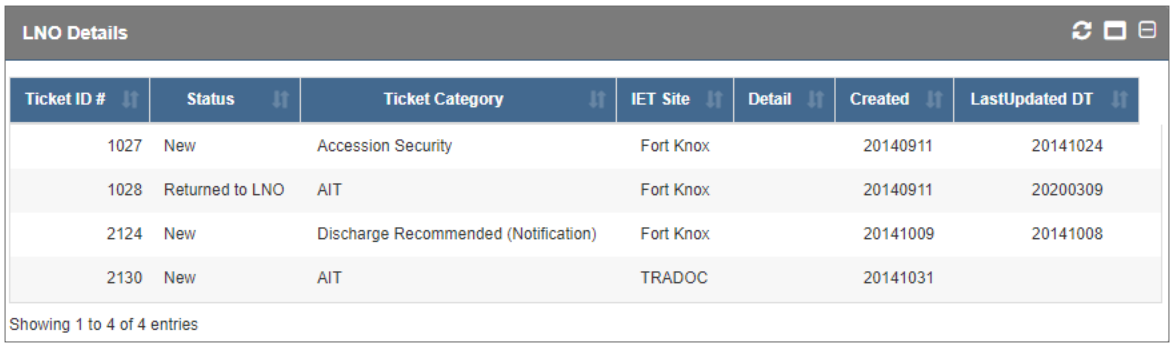
> **Tip -** Control-click to select more than one file to upload.

13. Click **Open**.
    - The file name appears in the *File* field.



14. Optionally, enter a description in the *Description* field.

15. Click **SAVE**.
    - The file(s) are uploaded to the ticket.
16. Optionally, repeat steps 11-18 for each ticket.
17. Click **CLOSE**.
18. Click **Refresh** .
    - The ticket(s) you created are added to the third panel *LNO Details* section.



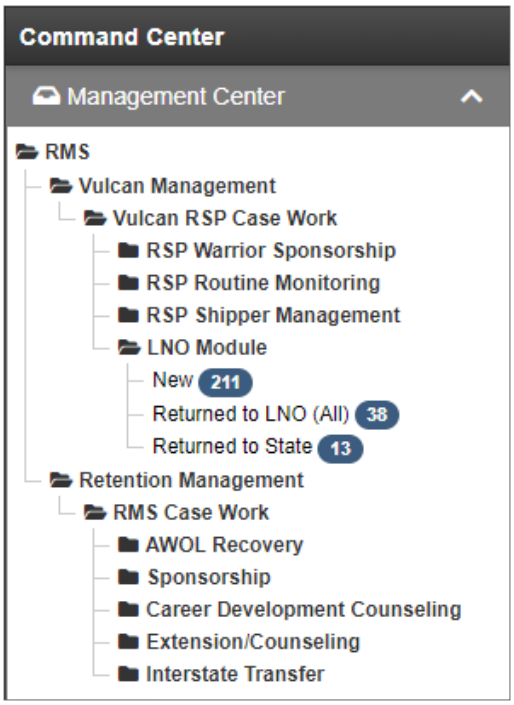
Ticket ID #	Status	Ticket Category	IET Site	Detail	Created	LastUpdated DT
1027	New	Accession Security	Fort Knox		20140911	20141024
1028	Returned to LNO	AIT	Fort Knox		20140911	20200309
2124	New	Discharge Recommended (Notification)	Fort Knox		20141009	20141008
2130	New	AIT	TRADOC		20141031	

> **Tip -** You can click a ticket in the *LNO Details* section to open it in the fourth panel and view its status and supporting documents.

8.4.2 View and Respond to New LNO Tickets

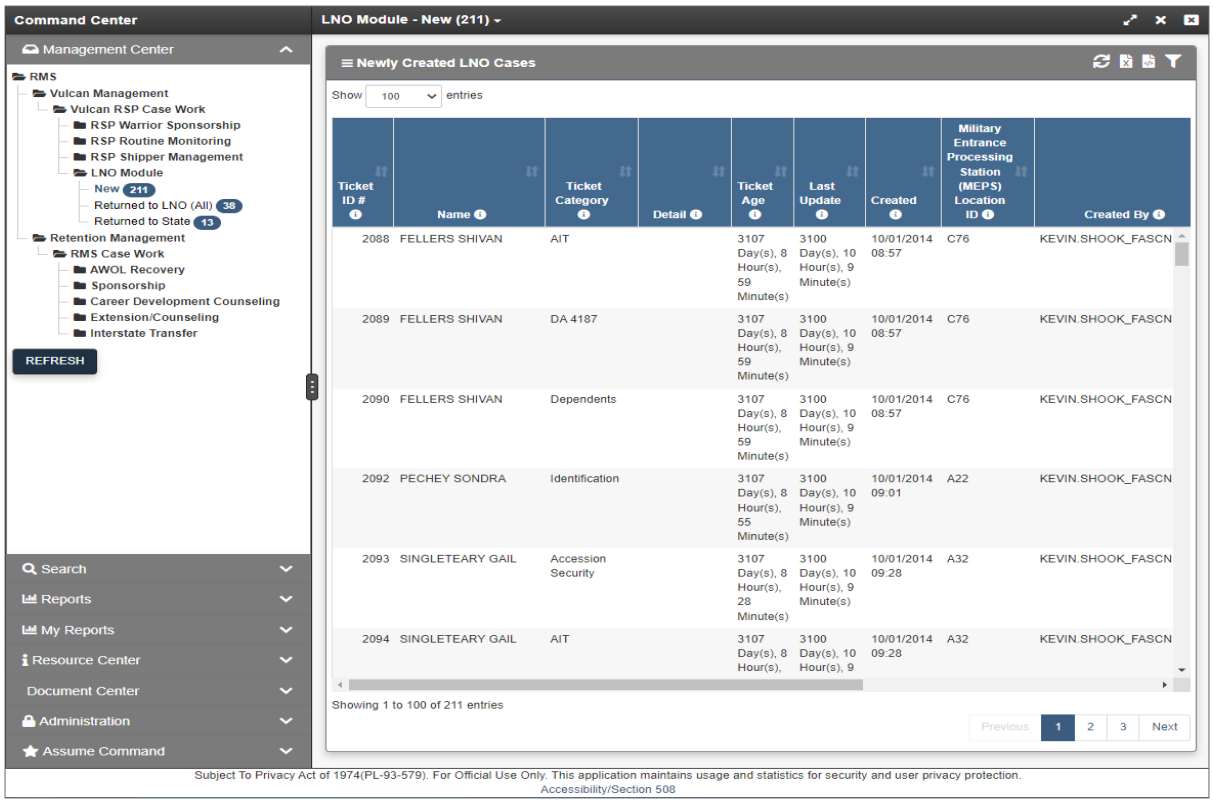
State and RSP Site users can view LNO tickets and respond as needed. (See **State Email Config** on page 1 for information about modifying the email distribution list for new LNO ticket notifications.)

1. Within the *Command Center*, open the *Management Center* tab and expand the **LNO Module** folder within the *Vulcan RSP Case Work* folder.



2. Click the **New** work bucket.

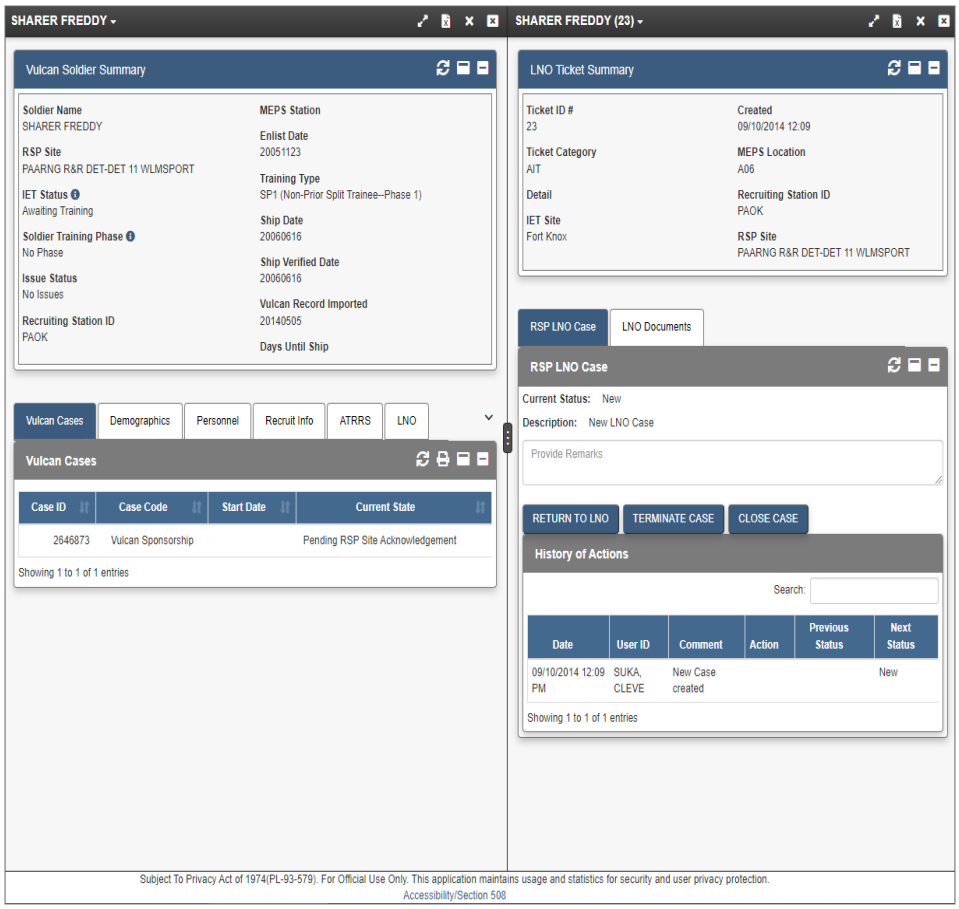
▶ The Case Roster loads in the second panel.



Tip - You can also find LNO tickets using Search. (See **Vulcan Ticket Search–LNO** on page 205 for more information.)

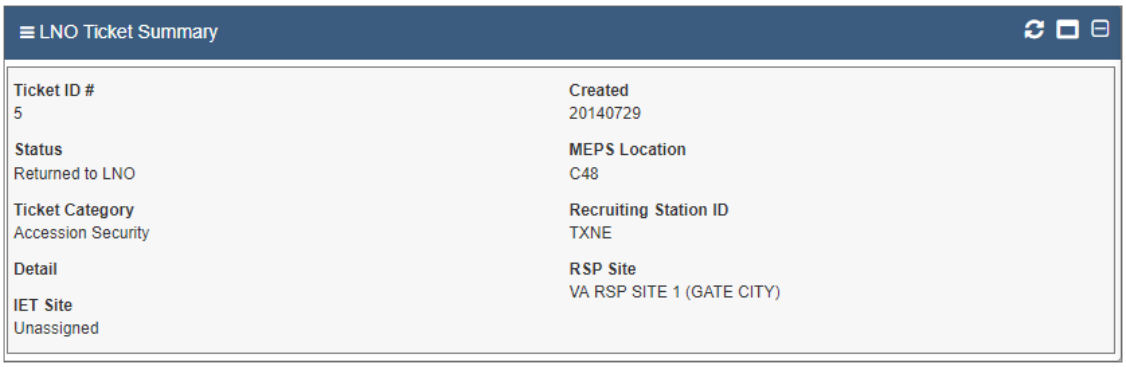
3. Select a ticket from the Case Roster.

- Soldier Details and Case Details open in the third and fourth panels.



> **Note -** Only the buttons your user role has permission to see are visible at the bottom of the fourth panel. (See **LNO ticket buttons** on page 170 for more information.)

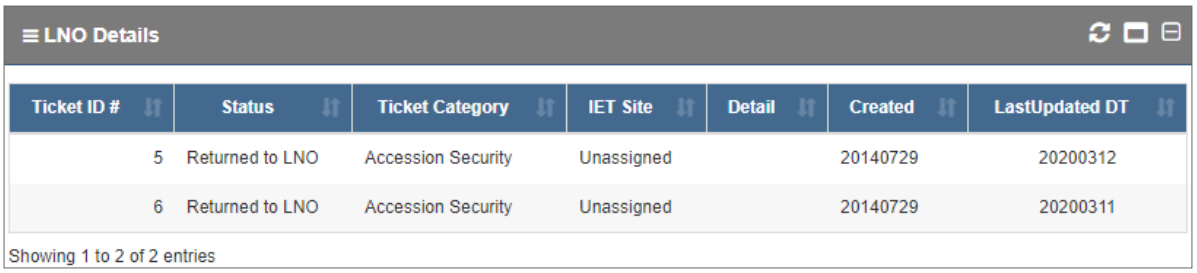
4. Review the *LNO Ticket Summary* section in the fourth panel.



> **Note -** You can also view and download any supporting documents available for the ticket in the *Documents* tab. (See **Documents** on page 186 for more information.)

> **Tip -** Open the *LNO* tab in the third panel to view the full list of the Soldier's LNO tickets. Click a ticket in the *LNO Details* section to open it in the fourth panel.

5. In the panel 3 *LNO* tab, click a ticket in the *LNO Details* section to open it in panel 4.



Ticket ID #	Status	Ticket Category	IET Site	Detail	Created	LastUpdated DT
5	Returned to LNO	Accession Security	Unassigned		20140729	20200312
6	Returned to LNO	Accession Security	Unassigned		20140729	20200311

Showing 1 to 2 of 2 entries

6. Enter comments about the ticket in the *Provide Remarks* field.

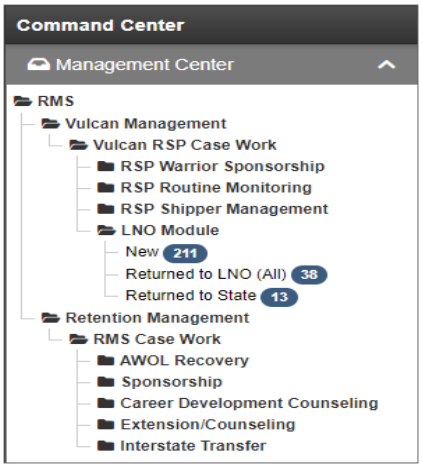
7. Click **SAVE COMMENTS**.
8. If necessary, open the *LNO Documents* tab to upload any required documents. (See **Documents** on page 186 for more information.)
9. Once the ticket is resolved, click **Return to LNO**.
   - A confirmation box appears.

10. Click **YES**.
    - An email is sent to the LNO who created the ticket, and the ticket is moved to that user's *Returned to LNO* work bucket.

8.4.3 Respond to LNO Tickets Returned to LNO

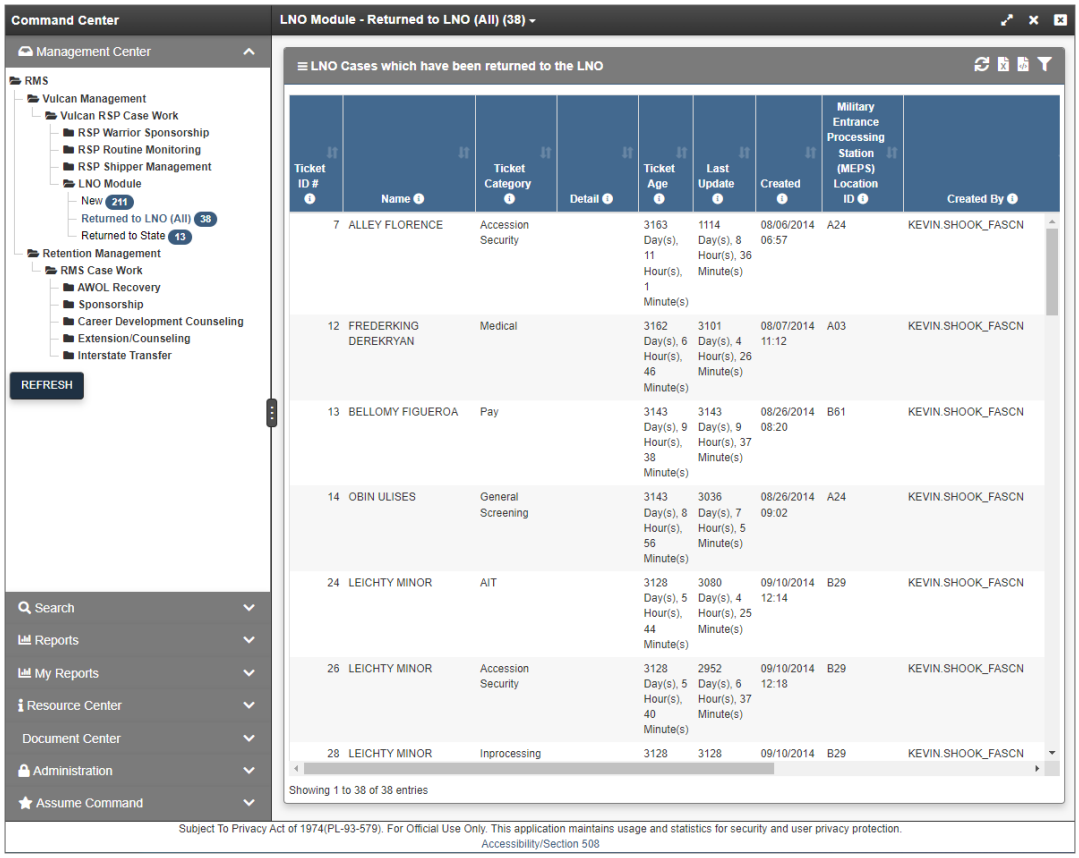
The LNO user who created a ticket is sent an email notification when a state user returns the ticket to the LNO. The LNO user can then return the ticket to the state, or close or terminate the case.

1. Within the *Command Center*, open the *Management Center* tab and expand the **LNO Module** folder within the *Vulcan RSP Case Work* folder.



2. Click the **Returned to LNO (All)** work bucket.

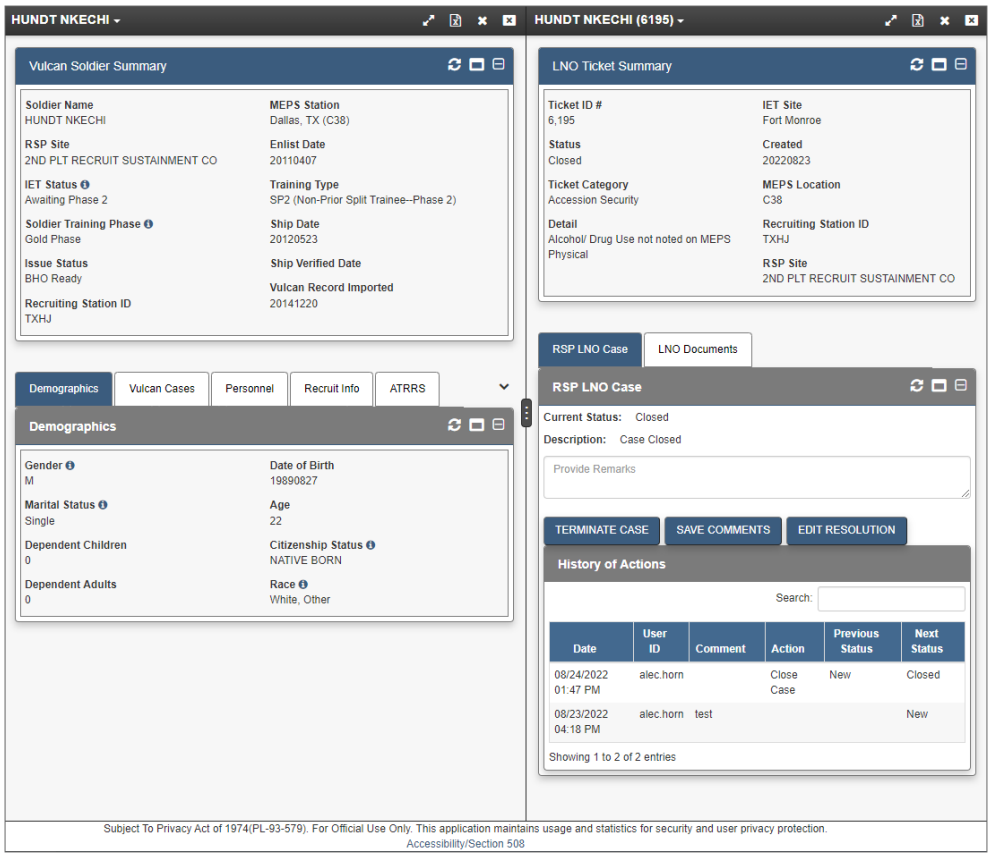
   ▶ The Case Roster loads in the second panel.



> **Tip -** You can also find LNO tickets using Search. (See **Vulcan Ticket Search–LNO** on page 205 for more information.)

3. Select a ticket from the Case Roster.

- Soldier Details and Case Details open in the third and fourth panels.



4. Review any comments added by a state user in the fourth panel *RSP LNO Case* tab.
5. Check for new documents in the *Documents* tab.
6. Enter comments about the ticket in the *Provide Remarks* field.

7. Click **SAVE COMMENTS**.

8.4.3.1 Return to State

If the LNO user who created the ticket determines that the state's response to the ticket is insufficient, it can be returned to the state.

1. Click **Return to State**.
   - A confirmation box appears.

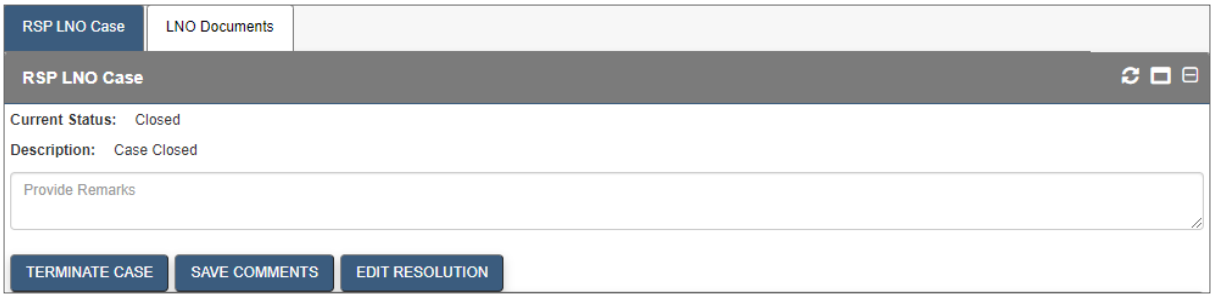
2. Click **YES**.
   - An email notification is sent to each state user listed in the state's *State Email Config* distribution list, and the ticket is moved to the *Returned to State* work bucket for a state user to review. (See **State Email Config** on page 1 for more information on LNO distribution lists.)

8.4.3.2 Close Case

If the ticket has been successfully resolved, an LNO user can close the case.

1. Click **CLOSE CASE**.
   - A confirmation box appears.

2. Select a remark from the drop-down list.
3. Click **YES**.
   - The case is closed.
4. You can edit a resolution to a closed ticket by selecting a closed ticket (either from the LNO tab or from the LNO Ticket Search) and clicking the **EDIT RESOLUTION** button.



5. The *Edit Resolution* window opens where you can change what the original resolution was. Click **YES**.
   - The resolution is changed and captured in the *History of Actions* section.

> **Note -** You can create custom resolution options that will appear in the remark drop-down from the *Resolution* module in the *Administration* blade. See **Resolution** on page 259.

8.4.3.3 Terminate Case

Only users in the Vulcan NGB Administrator role can terminate an LNO ticket case, and only when it has been determined that the ticket has been created in error.

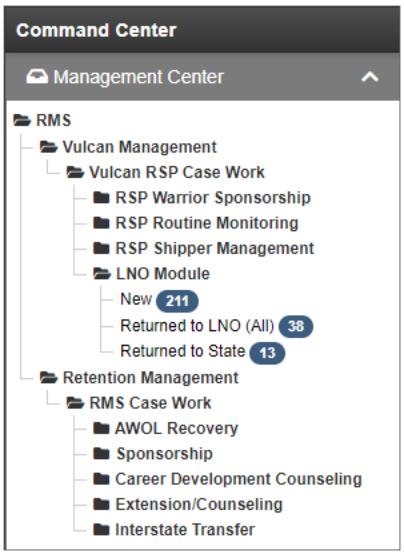
1. Click **TERMINATE CASE**.
   - A confirmation box appears.
2. Click **YES**.
   - The *RSP LNO Case* tab refreshes.
3. Enter remarks in the *Provide Remarks* field.
4. Click **SAVE COMMENTS**.
   - A confirmation box appears.

5. Click **YES**.
   - The case is terminated.

8.4.4 Respond to LNO Tickets Returned to State

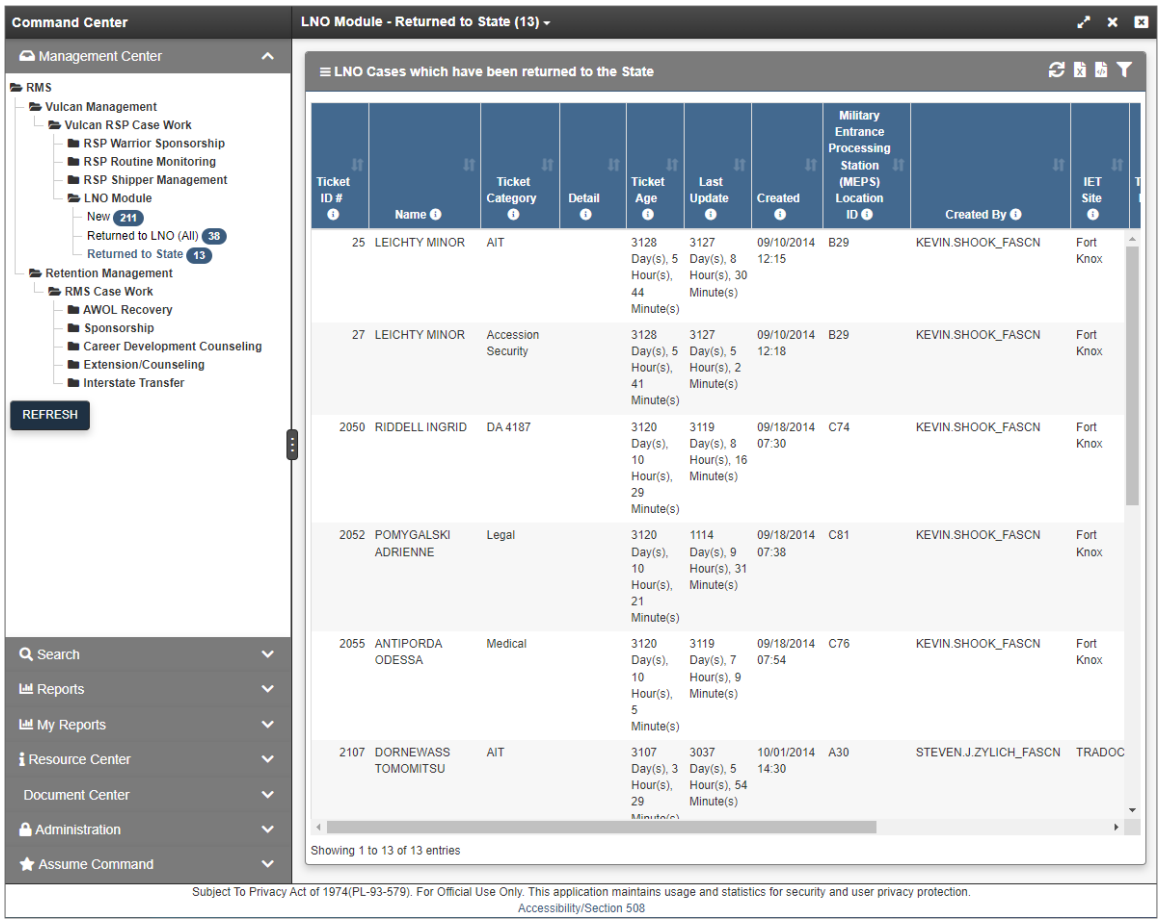
State users receive an email notification if the LNO user who created the ticket determines that the state's response to the ticket is insufficient and returns it to the state.

1. Within the *Command Center*, open the *Management Center* tab and expand the **LNO Module** folder within the *Vulcan RSP Case Work* folder.



2. Click the **Returned to State** work bucket.

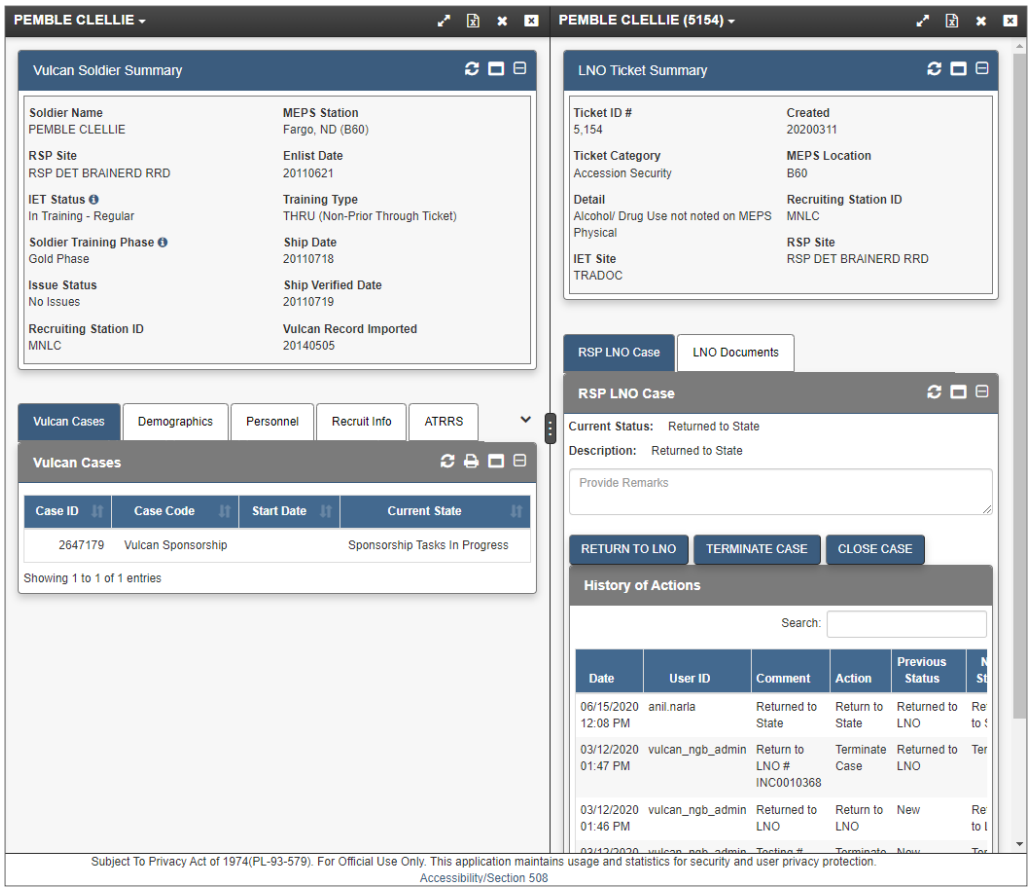
▶ The Case Roster loads in the second panel.



Tip - You can also find LNO tickets using Search. (See **Vulcan Ticket Search–LNO** on page 205 for more information.)

3. Select a ticket from the Case Roster.

- Soldier Details and Case Details open in the third and fourth panels.



4. Review any comments added by the LNO in the fourth panel *RSP LNO Case* tab.
5. Check for new documents in the *Documents* tab and upload any required documents. (See **Documents** on page 186 for more information.).
6. Enter comments about the ticket in the *Comments* field.

7. Click **SAVE COMMENTS**.
8. Click **RETURN TO LNO**.
   - A confirmation box appears.

9. Click **YES**.
   - An email is sent to the LNO who created the ticket, and the ticket is moved to that user's *Returned to LNO* work bucket.

8.4.5 LNO ticket buttons

See the table below for descriptions of the buttons on the fourth panel of LNO ticket cases.

Button	Applicable To	Action
Save Comments	Users, LNOs, and Administrators	Saves any comments that have been typed into the *Comments* field.
Return to LNO	State and Site RSPs	When the RSP has responded to an LNO ticket and believes the issue is resolved, this button returns the ticket back to the LNO who created the ticket, for review and closure.
Close Case	LNOs	When the LNO is satisfied that the ticket has been resolved, this button closes the ticket.
Return to State	LNOs	If an LNO ticket has been returned back to the LNO and the LNO feels that further action on the part of the RSP is required, this button returns the ticket back to the RSP for additional action.
Edit Resolution	LNOs	When a LNO ticket is in the closed status, users can edit the Resolution.
Terminate Case	NGB Administrators	RESTRICTED: The *Terminate Case* button is used to remove a ticket that was created in error. This button is available only to the Vulcan NGB Administrator. Requests to have tickets deleted must be forwarded to the Vulcan NGB Administrator.

9 Transition Services Module

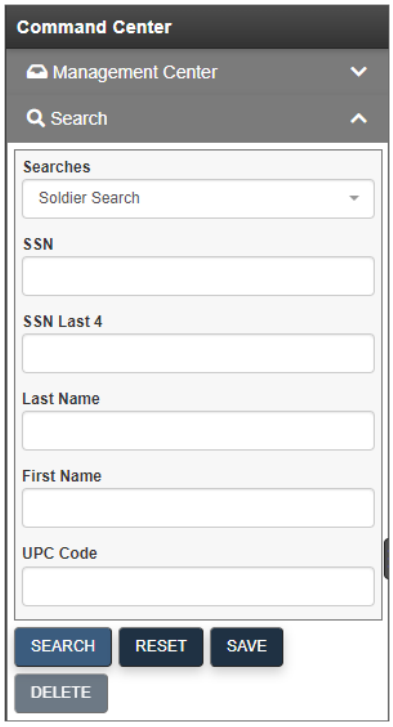
The Transition Services module assists unit leaders in tracking their Soldiers from enlistment to ETS to help prepare them for the transition into the civilian workforce. The module creates a case for each phase of the transition: Initial Phase, Service Phase, Budget Review, Transition Phase, and Transition Counselor Signoff. Each case includes a checklist corresponding with the items on DD Form 2958 (Service Member Career Readiness Standards/Individual Transition Plan Checklist) that apply to that phase. Unit leaders complete, sign, and submit the form through the Transition Services module.

9.1 Create a Transition Services Case

RMS automatically creates a Transition Services case in the *Initial Phase* work bucket after a Soldier's enlistment has been confirmed. Cases for existing Soldiers assigned to a unit can be created manually; these cases will be put into the *Service Phase* work bucket.

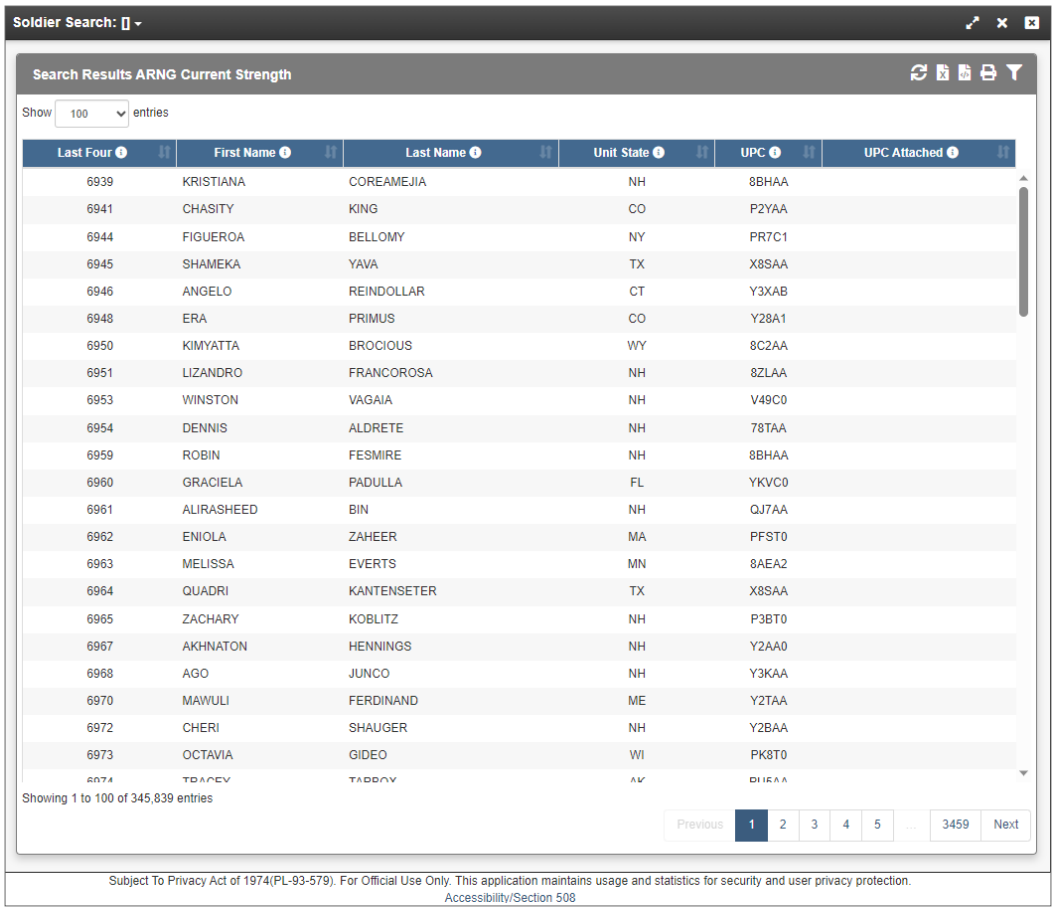
To manually create a Transition Services case:

1. Click the **Search** tab within the Command Center panel.
   - The *Search* screen opens.



2. Enter information into any of the available fields—*SSN*, *SSN Last 4*, *Last Name*, or *First Name*.
3. Click **Search**.

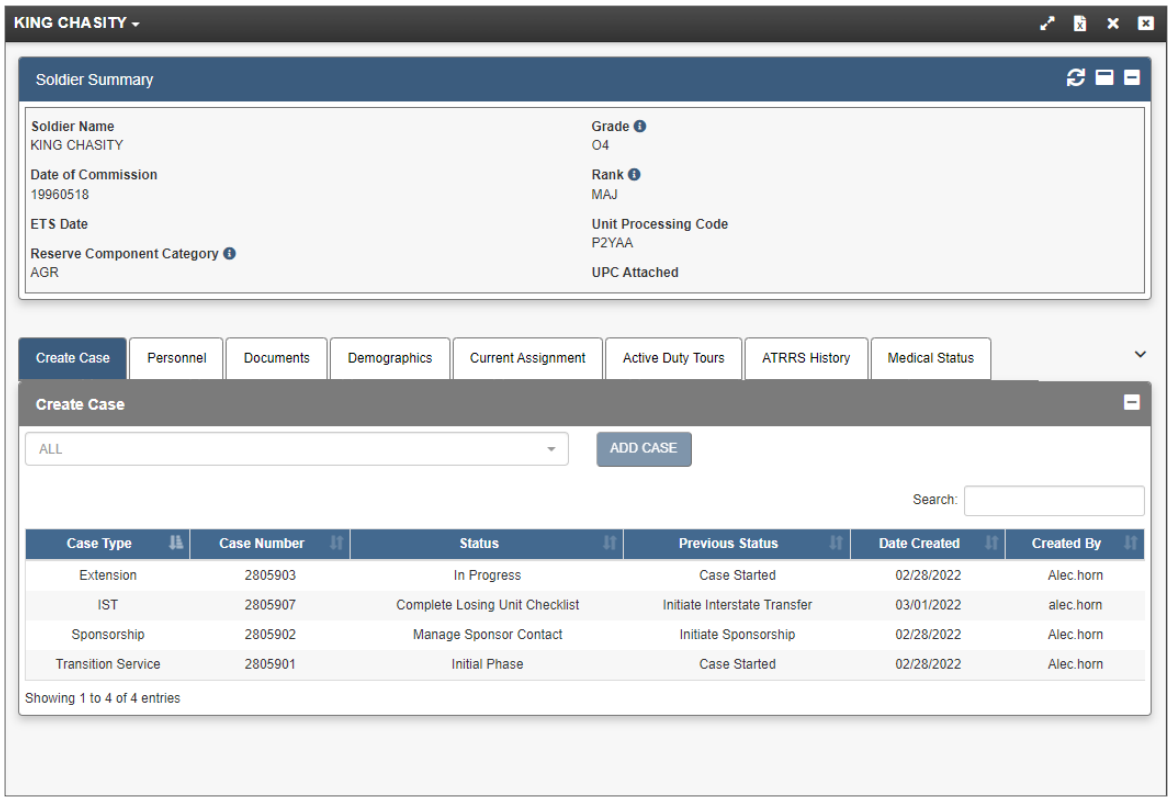
- The second panel displays a list of Soldiers matching your search criteria.



Last Four	First Name	Last Name	Unit State	UPC	UPC Attached
6939	KRISTIANA	COREAMEJIA	NH	8BHAA	
6941	CHASITY	KING	CO	P2YAA	
6944	FIGUEROA	BELLOMY	NY	PR7C1	
6945	SHAMEKA	YAVA	TX	X8SAA	
6946	ANGELO	REINDOLLAR	CT	Y3XAB	
6948	ERA	PRIMUS	CO	Y28A1	
6950	KIMYATTA	BROCIOUS	WY	8C2AA	
6951	LIZANDRO	FRANCOROSA	NH	8ZLAA	
6953	WINSTON	VAGAIA	NH	V49C0	
6954	DENNIS	ALDRETE	NH	78TAA	
6959	ROBIN	FESMIRE	NH	8BHAA	
6960	GRACIELA	PADULLA	FL	YKVC0	
6961	ALIRASHEED	BIN	NH	QJ7AA	
6962	ENIOLA	ZAHEER	MA	PFST0	
6963	MELISSA	EVERTS	MN	8AEA2	
6964	QUADRI	KANTENSETER	TX	X8SAA	
6965	ZACHARY	KOBLITZ	NH	P3BT0	
6967	AKHNATON	HENNINGS	NH	Y2AA0	
6968	AGO	JUNCO	NH	Y3KAA	
6970	MAWULI	FERDINAND	ME	Y2TAA	
6972	CHERI	SHAUGER	NH	Y2BAA	
6973	OCTAVIA	GIDEO	WI	PK8T0	

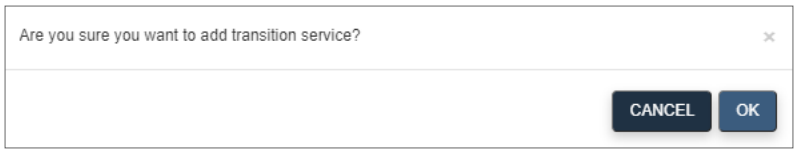
4. Click the name of the Soldier requiring a Transition Services case.

- The *Soldier Details* panel displays for the selected Soldier with the *Create Case* tab selected.



5. Select **Transition Service** from the available drop-down list.

6. Click **ADD TRANSITION SERVICE**.
   - A dialog box appears.



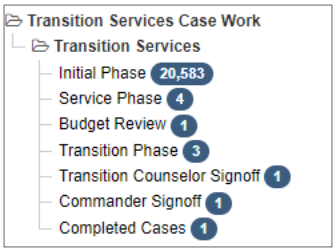
7. Click **OK**.
   - A Transition Service case is created for the Soldier. You can open the case from the Case List or navigate to the case from the *Service Phase* work bucket in the *Management Center* tab. (See **Management Center** on page 63.)

> **Note -** The case creation is also listed in the fourth panel *Action History* tab. (See **Action History** on page 195.

9.2 Access an Existing Case

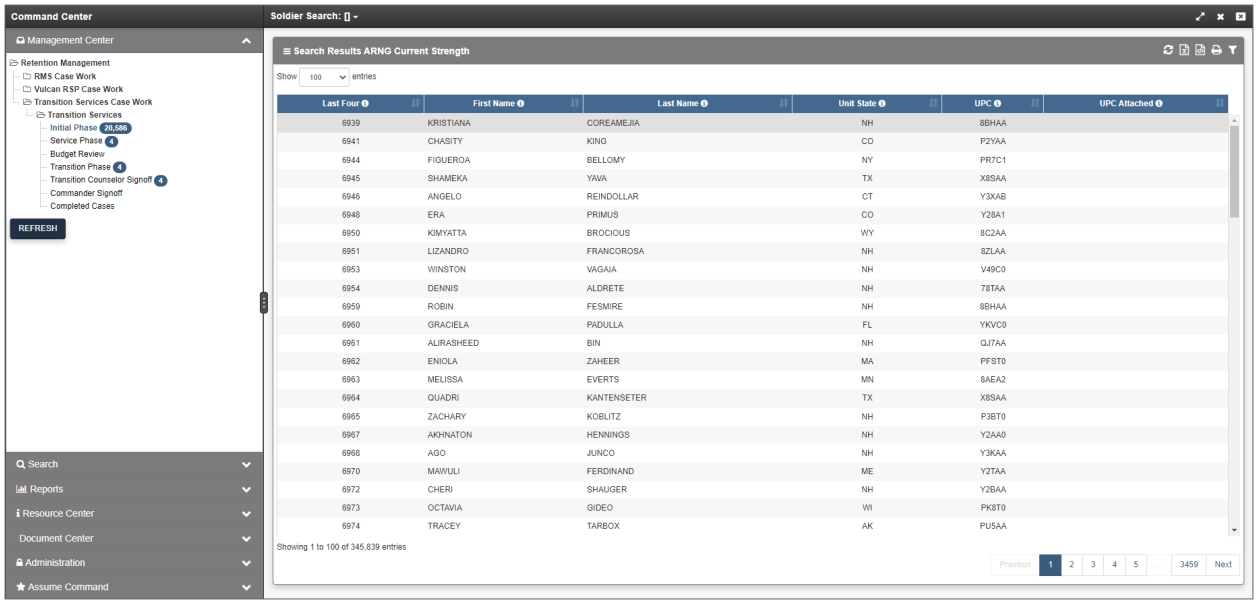
To open an existing Transition Services case:

1. Open the **Management Center** within the *Command Center* in the first panel.
2. Expand the **Transition Services** folder within the *Transition Services Case Work* folder.



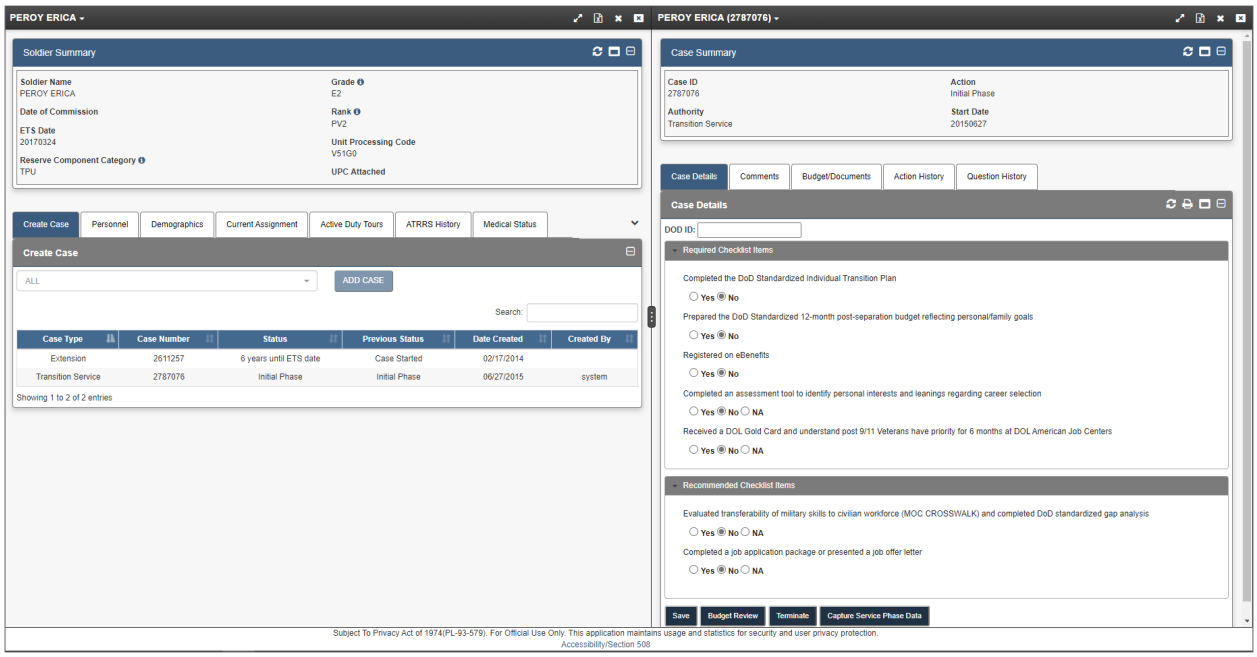
3. Click one of the available work buckets to display its Soldier Roster in the second panel.

   ▶ See **Work Buckets** on page 64 for descriptions of the work buckets.



4. Select a Soldier from the Soldier Roster.

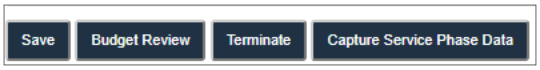
- Soldier Details open in the third panel. Case Details open in the fourth panel.



9.2.1 Terminate a Case

Users with the appropriate permission can terminate a case in any phase.

1. Click the **Terminate** button at the bottom of the fourth-panel *Case Details* tab.



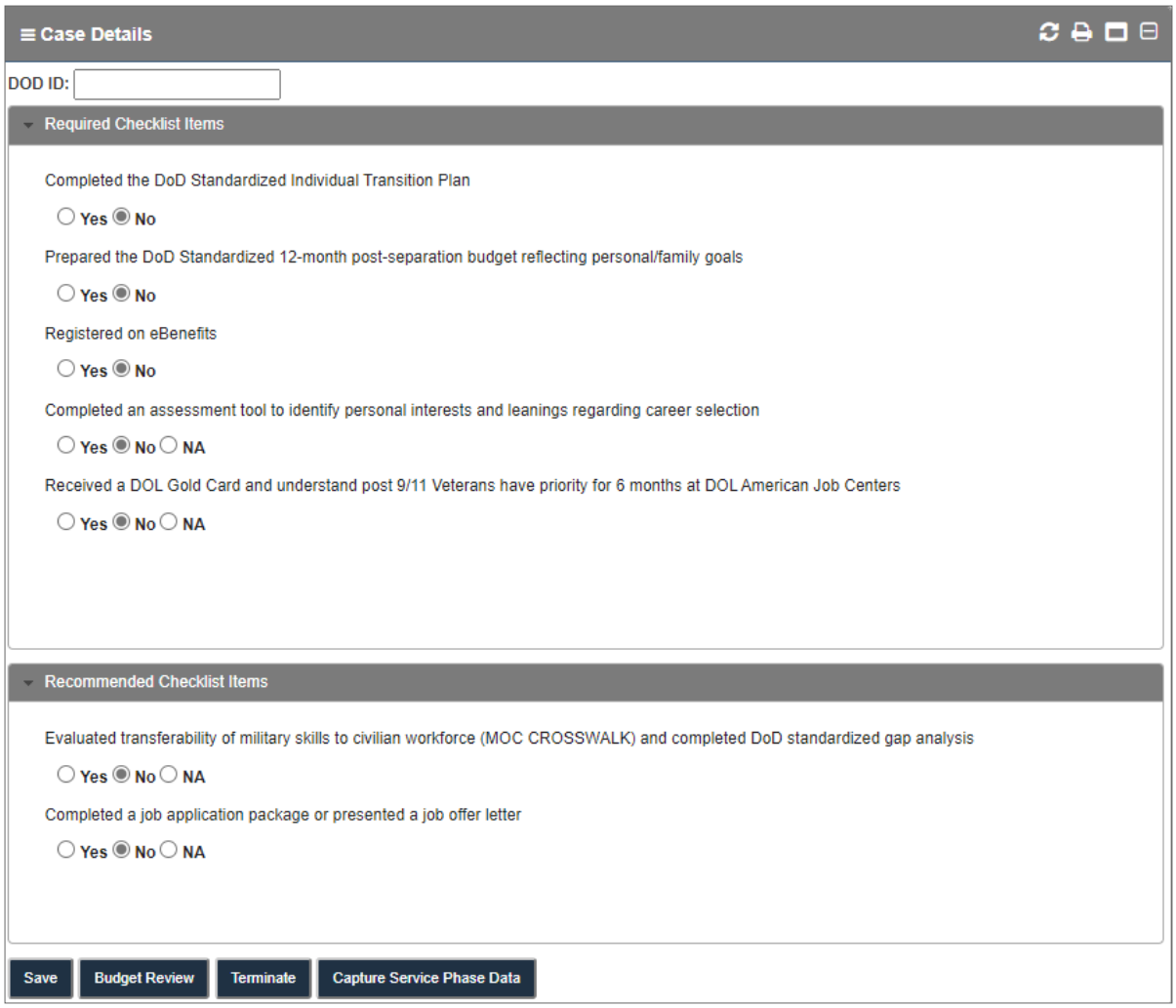
2. Click **OK**.
   - The case is terminated.

9.3 Initial Phase

The Initial Phase begins when a Soldier's enlistment is confirmed. The case remains in this phase until completion of basic training.

1. Open a case in the *Initial Phase* work bucket. (See **Access an Existing Case** on the previous page.)

- The fourth-panel *Case Details* tab displays a checklist of required and recommended tasks to complete for the Soldier.



2. Select the **Yes** check box for each item as it is completed.
   - The *Date Completed* field appears with today's date selected after a *Yes* check box is selected.

     Date completed: 01/12/2022

     a. If the default date is not correct, use the *Date Picker* to select the correct date.

     > **Tip -** If a checklist item is not applicable to the Soldier, select the **NA** check box.

3. At any time, click **Save** to save your changes.
4. When you are finished with the checklist, click **Capture Service Phase Data** to send the case to the Service Phase.
5. Click **OK**.

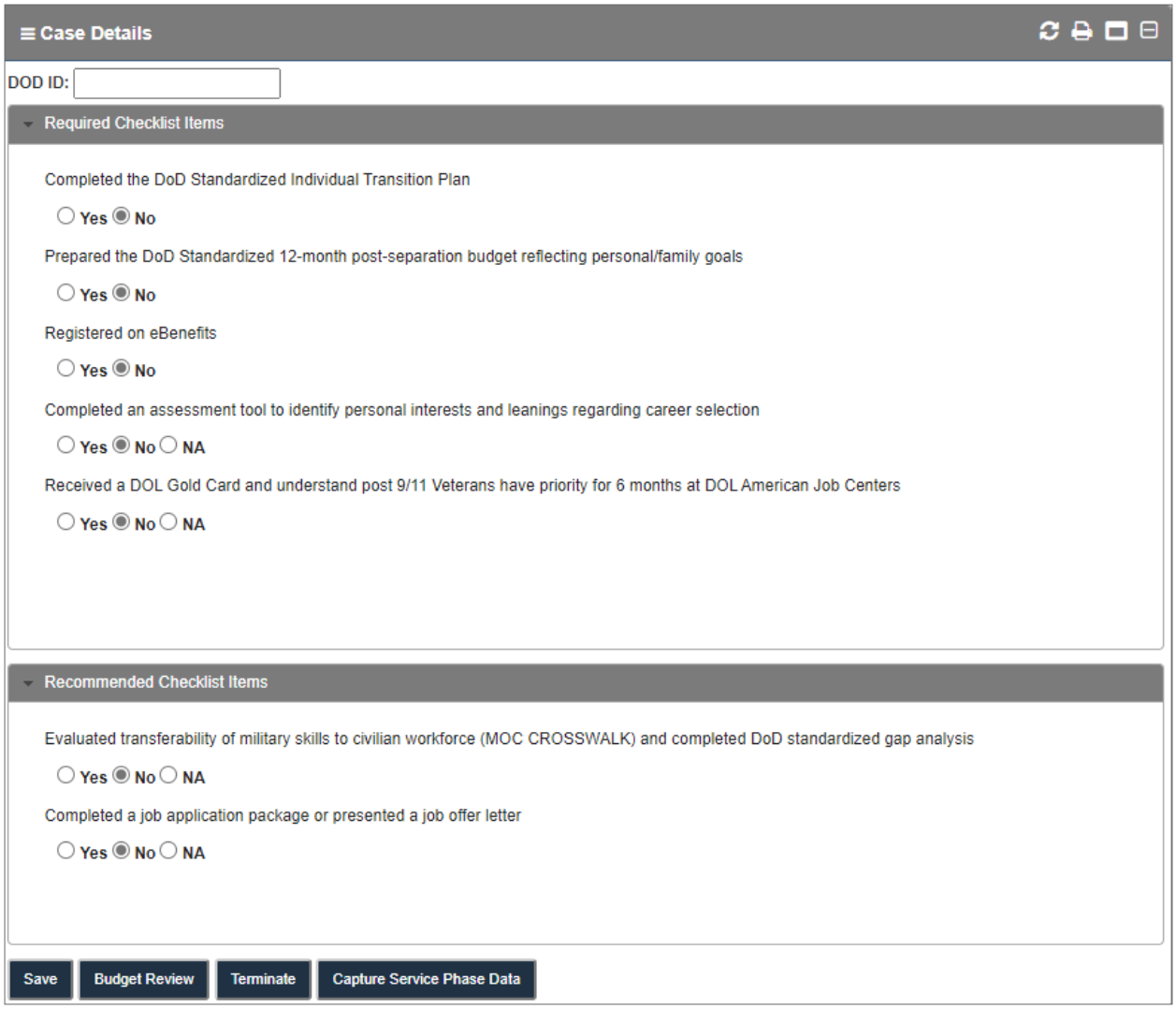
- The screen is refreshed and the case is moved to the *Service Phase* work bucket.

9.4 Upload Budget

The Soldier's budget can be uploaded at any phase in the Transition Services module. Budget approval is a required step in the Transition Services process.

When the checklist item for creating the Soldier's budget is marked complete, the user is prompted to upload the budget.

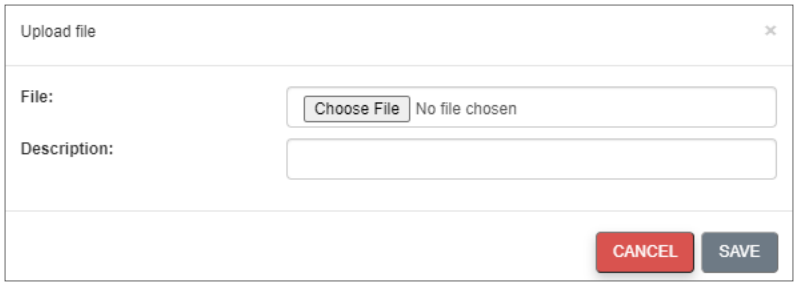
1. Open a case in the *Initial Phase*, *Service Phase*, or *Transition Phase* work bucket. (See **Access an Existing Case** on page 174.)
   - The fourth-panel *Case Details* tab displays a checklist of required and recommended tasks to complete for the Soldier.



2. Select **Yes** for *Prepared the DoD Standardized 12-month post-separation budget reflecting*

personal/family goals.

- The *Upload file* window appears.



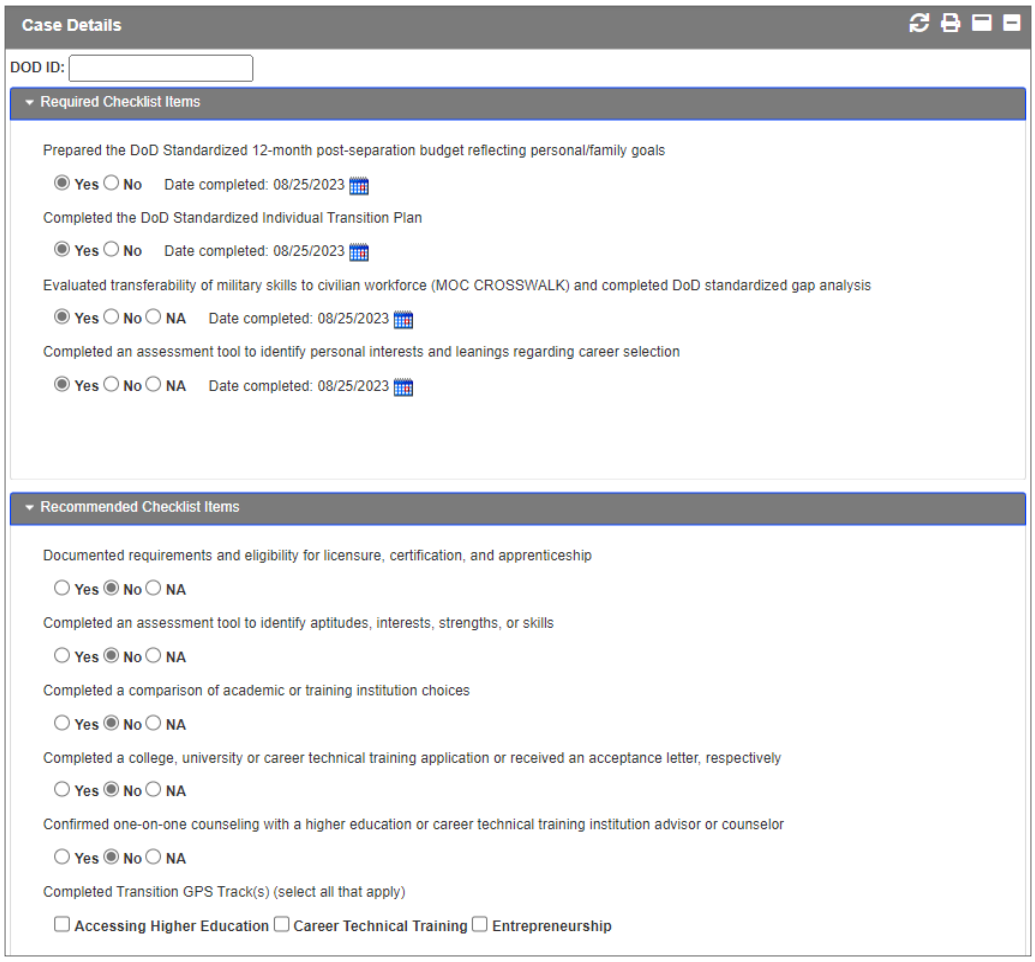
3. Click **Choose File**.
   - The *Select file to upload* window opens.
4. Navigate to the folder where the Soldier's budget is saved and select the file.
5. Click **Open**.
6. Optionally, enter a description in the *Description* field.
7. Click **SAVE**.
   - The budget is uploaded and can be accessed from the *Budget/Documents* tab.
8. Click **Budget Review** at the bottom of the screen.
9. The page is refreshed and the case is moved to the *Budget Review* work bucket for approval. (See **Budget Review** on page 180.)

9.5 Service Phase

The Service Phase begins when a Soldier is assigned to a unit.

1. Open a case in the *Service Phase* work bucket. (See **Access an Existing Case** on page 174.)

- The fourth-panel *Case Details* tab displays a checklist of required and recommended tasks to complete for the Soldier.



> **Note -** If any answers were selected for the checklist in a previous phase, the input is carried over to the next phase.

2. Select the **Yes** check box for each item as it is completed.
   - The *Date Completed* field appears with today's date selected after a *Yes* check box is selected.

     Date completed: 01/12/2022

     a. If the default date is not correct, use the *Date Picker* to select the correct date.

     > **Tip -** If a checklist item is not applicable to the Soldier, select the **NA** check box.

3. Upload the Soldier's budget, if available. (See **Upload Budget** on page 177.)
4. At any time, click **Save** to save your changes.
5. When you are finished with the checklist, click **Capture Transition Phase Data** to send the case to

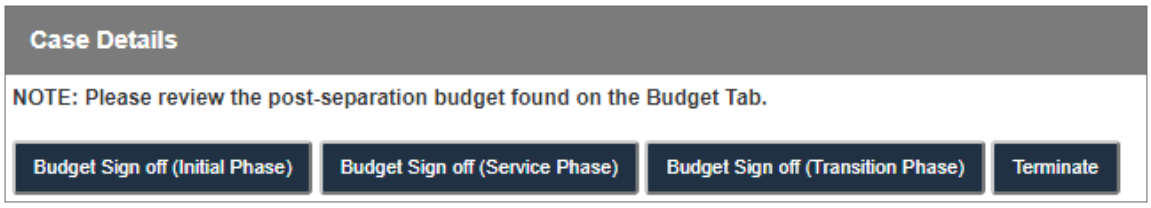
the Transition Phase.

6. The screen is refreshed and the case is moved to the *Transition Phase* work bucket.

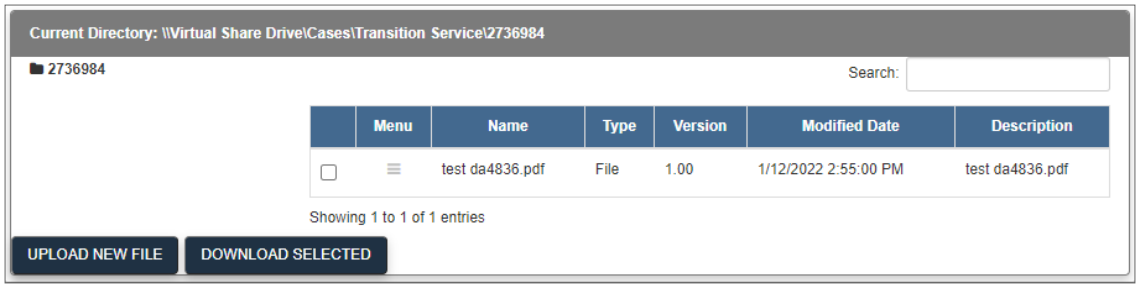
9.6 Budget Review

The Budget Review begins after the Soldier's post-separation budget is uploaded and the unit leader clicks the *Budget Review* button in the fourth panel.

1. Open a case in the *Budget Review* work bucket. (See **Access an Existing Case** on page 174.)
   - The fourth-panel *Case Details* tab displays options the *Budget Sign off* and *Terminate Case* buttons.



2. Review the Soldier's budget by downloading it from the *Budget/Documents* tab.
   a. Click the **Budget/Documents** tab.
      - The *Budget/Documents* tab opens.

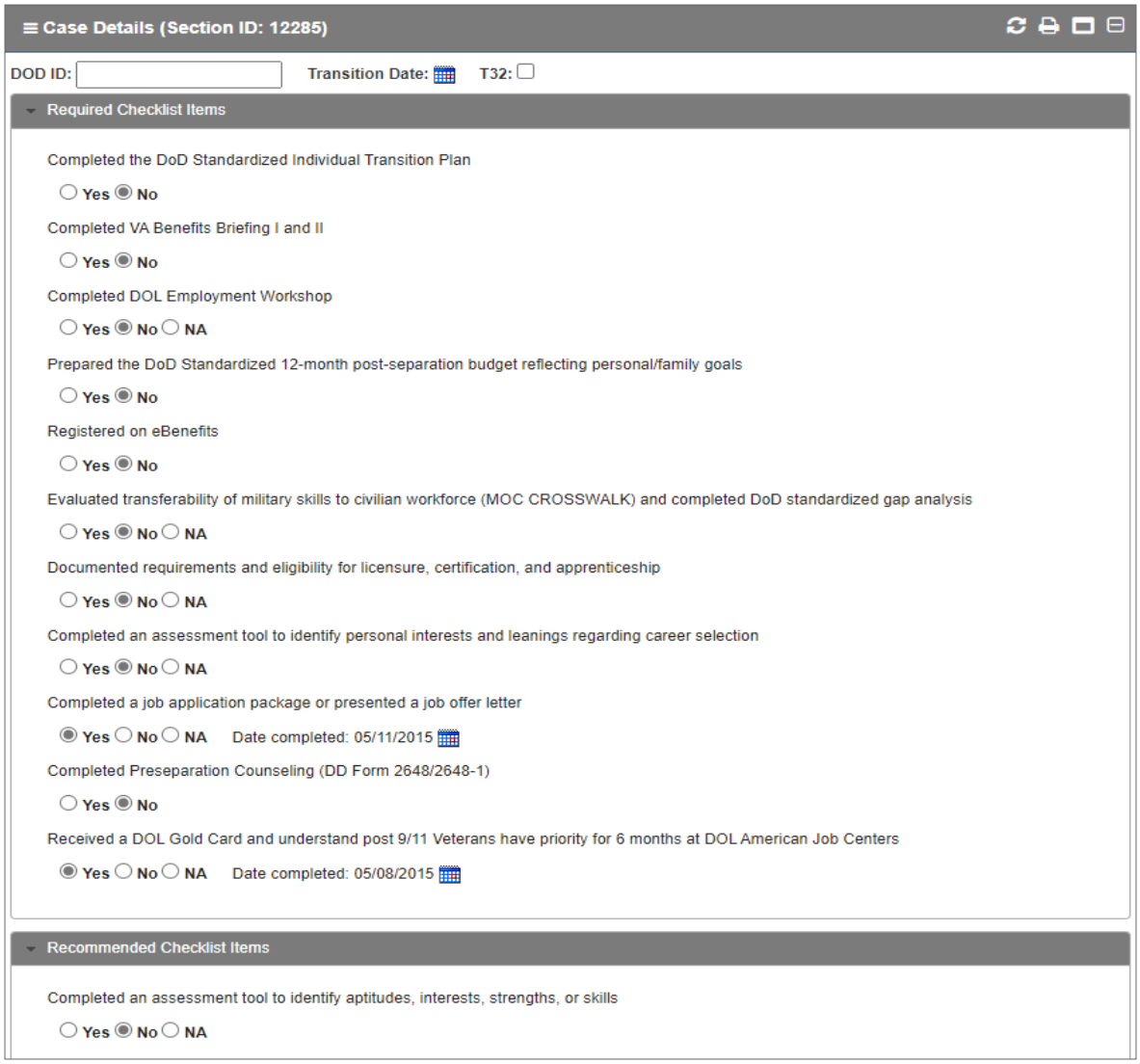


   b. Select the check box for the Soldier's post-separation budget document.
   c. Click **DOWNLOAD SELECTED** at the bottom of the screen.
   d. Follow the prompts to open or save the document.
3. When you are finished reviewing the budget, click the **Case Details** tab.
4. Click **Budget Sign off** to approve the budget.
5. The case is returned to the work bucket of the Soldier's current phase (Initial Phase, Service Phase, or Transition Phase).

9.7 Transition Phase

The Transition Phase begins when a Soldier is within 12 months of ETS or has between 24 months and 20 years of experience in the National Guard.

1. Open a case in the *Transition Phase* work bucket. (See **Access an Existing Case** on page 174.)
   - The fourth-panel *Case Details* tab displays a checklist of required and recommended tasks to complete for the Soldier.



> **Note -** Scroll down to view all checklist items.

> **Note -** If any answers were selected for the checklist in a previous phase, the input is carried over to the next phase.

2. Select the **Yes** check box for each item as it is completed.

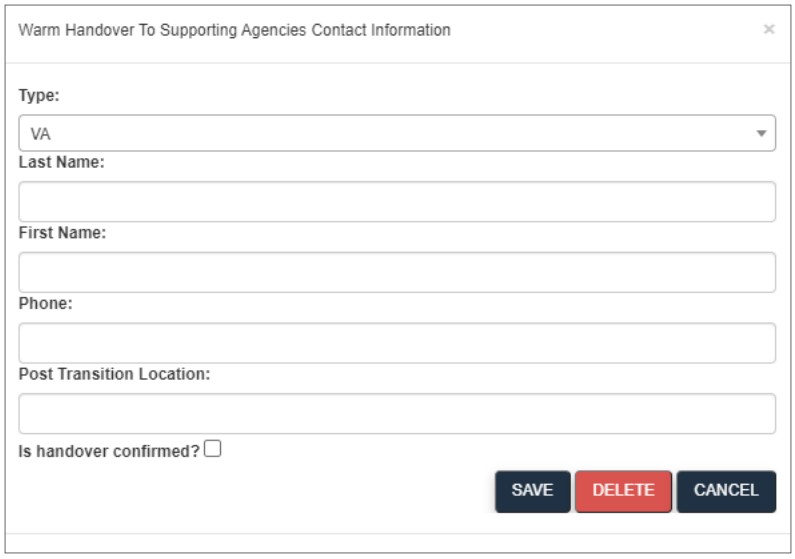
- The *Date Completed* field appears with today's date selected after a *Yes* check box is selected.

  Date completed: 01/12/2022

  a. If the default date is not correct, use the *Date Picker* to select the correct date.

  > **Tip -** If a checklist item is not applicable to the Soldier, select the **NA** check box.

3. Upload the Soldier's budget, if available. (See **Upload Budget** on page 177.)
4. At any time, click **Save** to save your changes.
5. Scroll down and click **Add Contact** in the *Warm Handover To Supporting Agencies Contact Information* section.
   - The *Warm Handover To Supporting Agencies Contact Information* window appears.

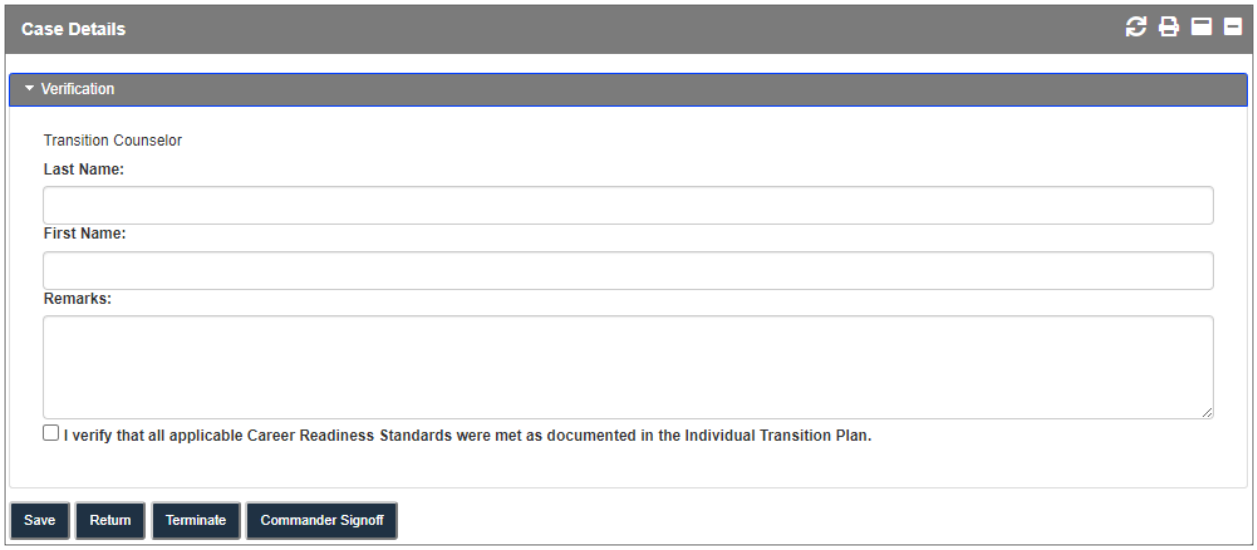


   a. Select the *Type* from the available drop-down list.
   b. Enter the *Last Name*, *First Name*, *Phone*, and *Post Transition Location* in the available fields.
   c. Select the *Is handover confirmed?* check box if applicable.
   d. Click **SAVE**.
      - The information you entered appears in a grid below the *Add Contact* button.
6. When you are finished with the checklist, click **Sign off** to send the case to the Transition Counselor for sign off.
7. The screen is refreshed and the case is moved to the *Transition Counselor Signoff* work bucket.

9.8 Transition Counselor Signoff

The Transition Counselor Signoff begins after all checklist items are completed and the unit leader clicks the *Sign off* button in the fourth panel.

1. Open a case in the *Transition Counselor Signoff* work bucket. (See **Access an Existing Case** on page 174.)
   - The fourth-panel *Case Details* tab displays fields for the names and remarks of the Transition Counselor and Commander.



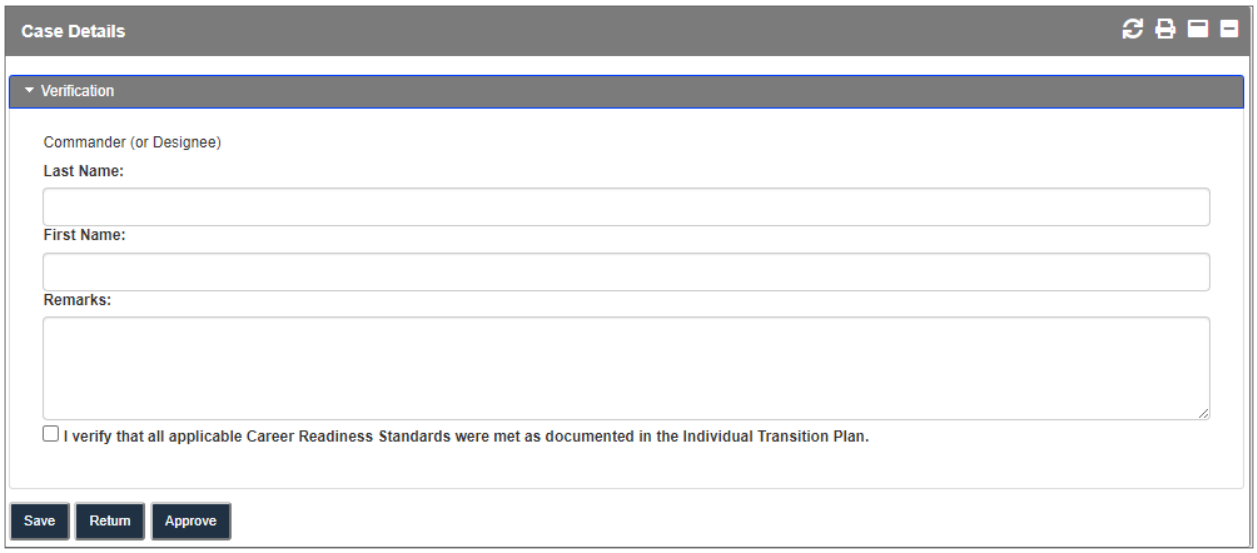
2. Enter the names and remarks of the Transition Counselor.
3. Select the check box for *I verify that all applicable Career Readiness Standards were met as documented in the Individual Transition Plan*.
4. At any time, click **Save** to save your changes.
5. Click **Commander Signoff** to send the case to the Commander for sign off.
6. The screen is refreshed and the case is moved to the *Commander Signoff* work bucket.

9.9 Commander Signoff

Commander Signoff begins after all checklist items are completed and the case is sent to the Commander for sign off.

1. Open a case in the *Commander Signoff* work bucket. (See **Access an Existing Case** on page 174.)

- The fourth-panel *Case Details* tab displays fields for the names and remarks of the Transition Counselor and Commander.



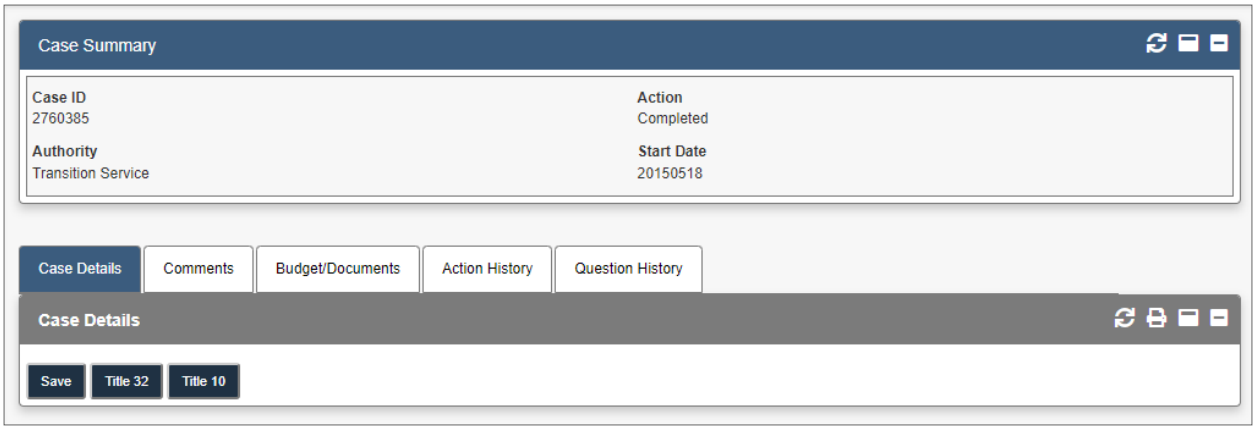
2. Enter the names and remarks of the Commander or Designee.
3. Select the check box for *I verify that all applicable Career Readiness Standards were met as documented in the Individual Transition Plan*.
4. At any time, click **Save** to save your changes.
5. Click **Approve** to approve the case.
6. The case is closed and is moved to the *Completed Cases* work bucket.

9.9.1 Return a Case to Transition Phase

1. Click the **Return** button at the bottom of the fourth-panel *Case Details* tab.
2. The case is returned to the *Transition Phase* work bucket.

9.10 Completed Cases

This work bucket houses cases that have been signed off by the Commander.



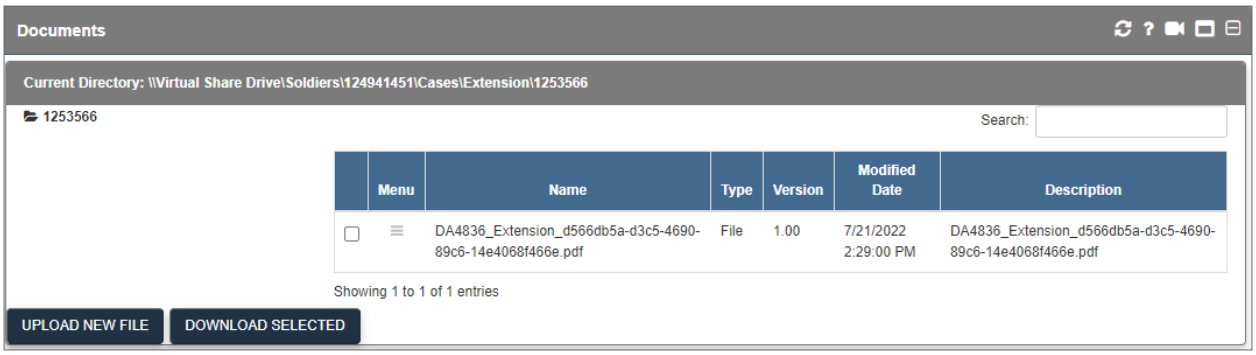
The Case Details section contains three buttons. They are the *Save*, *Title 32*, and *Title 10* buttons.

10 Additional Actions

The fourth panel contains a number of other tabs. The tabs that appear here are different depending on what module you are in.

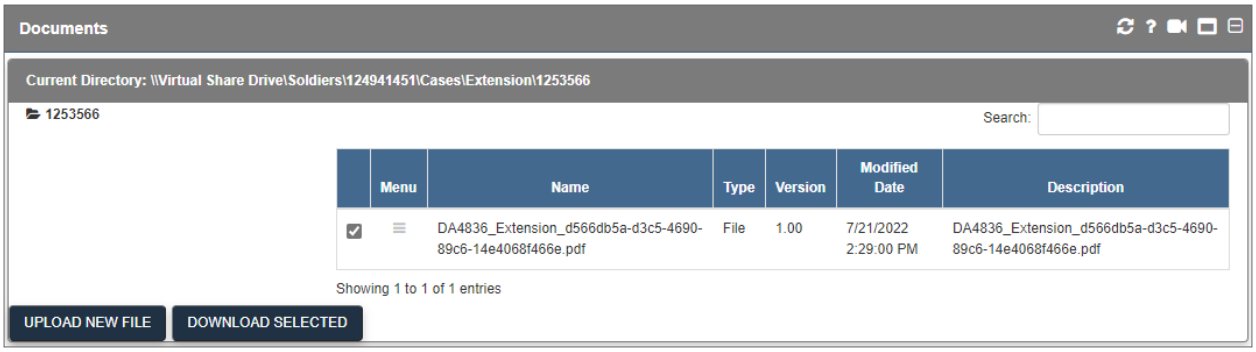
10.1 Documents

The *Documents* tab appears for every RMS module. It allows you to filter, download, and upload files pertaining to the selected Soldier.



10.1.1 Download a File

1. From the *Documents* tab, check the check box(es) of the file(s) that you want to download.

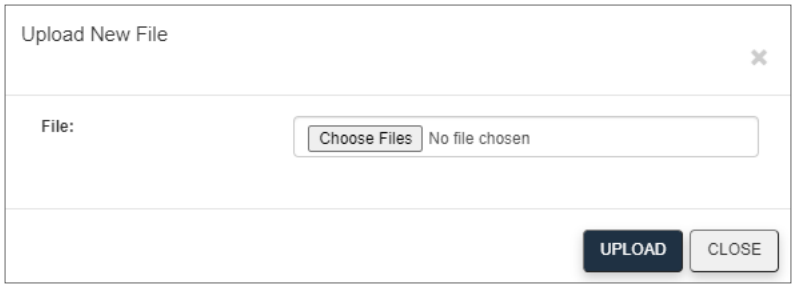


> **Note -** If more than one file is selected, the files are downloaded as a zip file.

2. Click **DOWNLOAD SELECTED** at the bottom of the screen. The file(s) are downloaded.

10.1.2 Upload a File

1. Click **UPLOAD NEW FILE**.
   - The *Upload New File* dialog box opens.



2. Click **Choose Files**.
3. Navigate to the file, and click **Open**.
   - The *File* field is populated with the name of the file.

   > **Note -** You can upload multiple files at a time by simply selecting more than one file before clicking **Open**.

4. Click **UPLOAD**.
   - The file is uploaded.

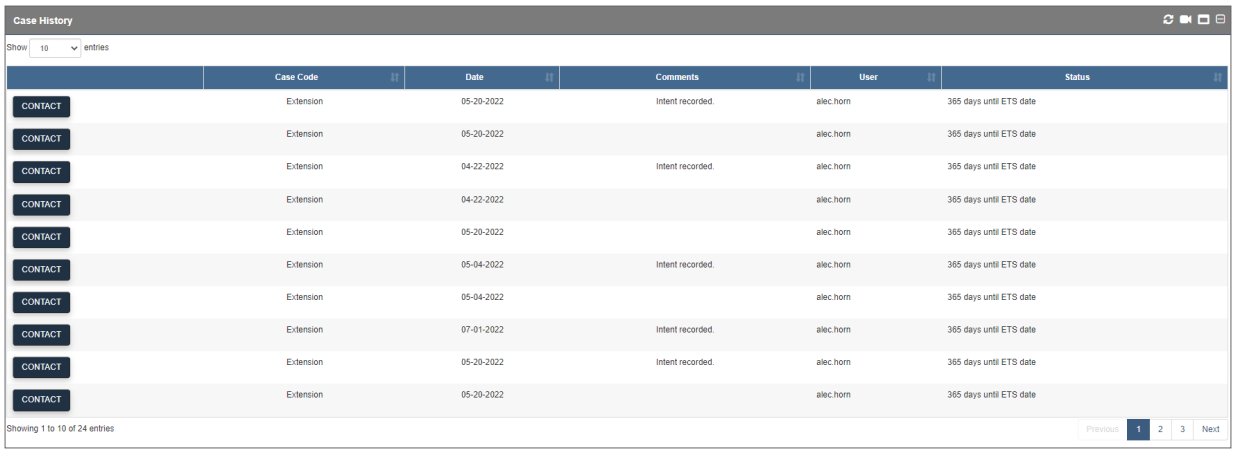
   > **Note -** Any documents uploaded in the 4th panel will be available in the *Documents* tab in Panel 3 where all documents uploaded to the Soldier's case are consolidated.

10.2 Case History

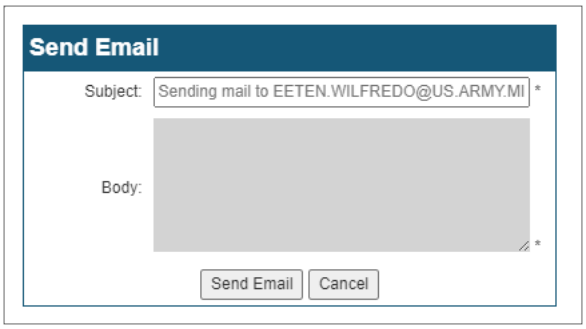
The *Case History* tab appears in Panel 4 for every RMS module except for Transition Services cases.

1. Click the **Case History** tab.

- The *Case History* tab opens, displaying information about previous actions completed for the Soldier.



2. To contact the Soldier, click **CONTACT** to open the *Send Email* window.



3. Compose the email and click **Send Email**.
   - A copy of the sent email will be sent to you (the user) as well.

10.3 Extension Additional Actions

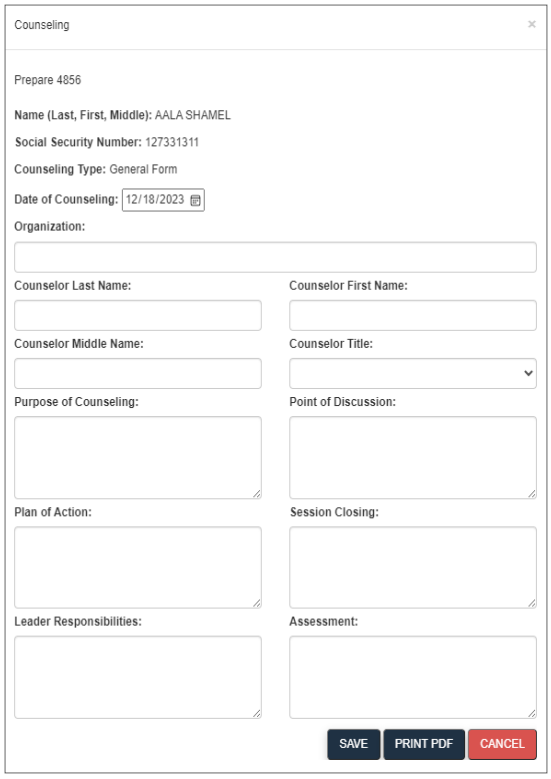
The following additional actions are available for Extensions cases.

10.3.1 Counseling

1. Click the **Counseling** tab in the *Case Details* (fourth) panel.

- The tab opens, showing information about previous counseling sessions completed with the Soldier.

2. Click a row to view more information about the counseling entry.
   - The *Counseling* pop-up window opens.



3. If you created the original counseling record for the entry, you can edit the information in the *Counseling* pop-up window.
4. Click **SAVE**. Or to exit without saving, click **CANCEL**.
5. Click **PREPARE NEW 4856 COUNSELING** at the bottom of the *Counseling* tab window to enter a new counseling session. The *Prepare New 4856 Counseling* button is also located on the first page of the *Case* tab of the *Soldier Intent* screen.

10.3.2 Incentive Contracts

The *Incentive Contracts* tab displays all incentive contracts associated with the Soldier. Any prior incentive contracts and ones that are currently in effect or being applied for are included in the *Incentive Contracts* tab.

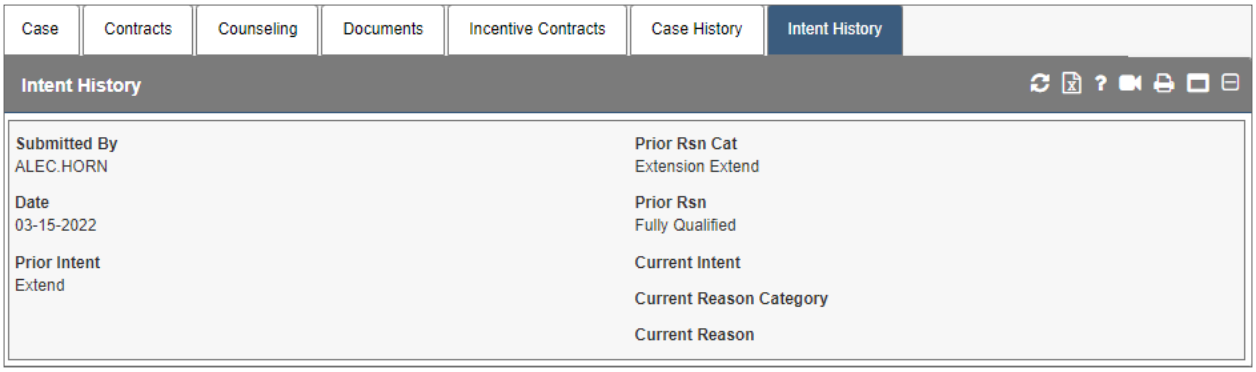
Incentive Contracts

Search:

Contract ID	Control Number	Contract Type	Rate Code	Contract Amount	Current Status	Contract Issue Date
730325	A21060001GANGB	EAB	MSEA	$0.00	Waiting for Uploading Manual Contract Documents	20210625
730563	S21110001GANGB	RE	MLRE2	$50,000.00	Contract Initiated	20211104
730567	S21110001GANGB	RE	MLRE2	$50,000.00	Contract Initiated	20211104
730568	S21110001GANGB	RE	MLRE2	$50,000.00	Contract Initiated	20211104
730569	S21110001GANGB	RE	MLRE2	$50,000.00	Contract Initiated	20211104

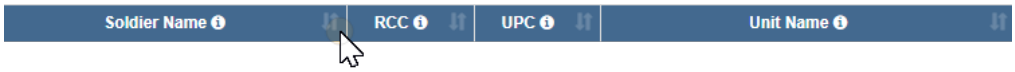
10.3.3 Intent History

Click the **Intent History** tab in the *Case Details* (fourth) panel.
The tab opens, showing a list of every change to a case's intent that was previously recorded in the *Case* tab.



10.3.3.1 Filtering

You can filter by clicking on the arrow icons in each column title. Doing so sorts the information by ascending or descending order.



10.4 IST Additional Actions

The following additional actions are available for IST cases.

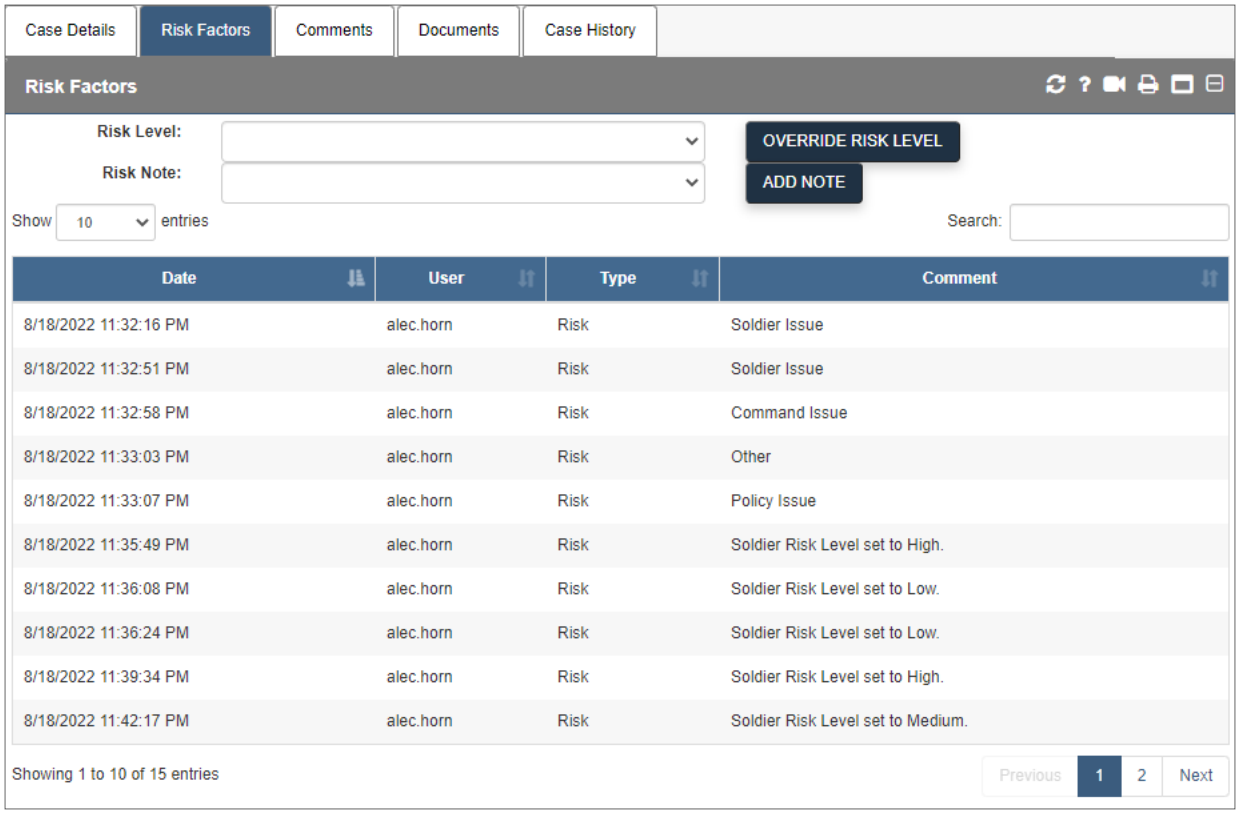
10.4.1 Risk Factors

IST uses a risk code to communicate the potential stress the Interstate Transfer may put on the Soldier. Any IST user can add a risk note to a case from the *Risk Factors* tab in the *Case Details* (fourth) panel; IST Help Desk Admin users can also override a risk level from the *Risk Factors* tab.

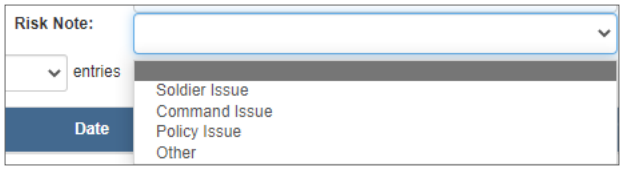
10.4.1.1 Risk Notes

Adding a risk note to a case automatically increases the case's risk level to medium.

1. In the *Case Details* (fourth) panel, click the **Risk Factors** tab.
   - The *Risk Factors* tab opens, displaying previously entered Risk Factors.



2. To add a new note, open the *Risk Note* drop-down menu and select an option.



3. Click **ADD NOTE**.
   - The note is added to the grid table and the screen is refreshed.

10.4.1.2 Risk Levels

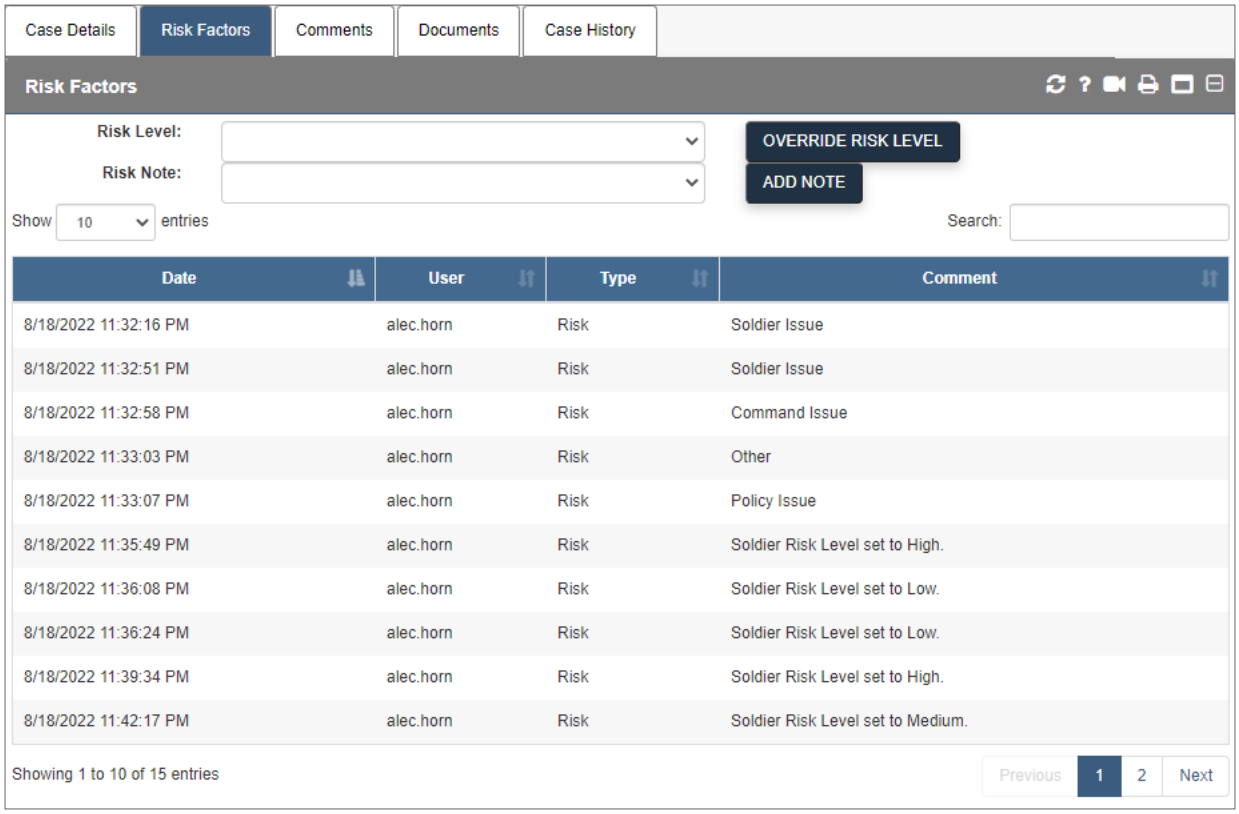
There are three risk codes that indicate the level of risk involved with a given Soldier's interstate transfer: no risk (green), medium risk (amber), and high risk (red). While the criteria that determines each risk level can depend on multiple factors, an example of a high-risk transfer is an unemployed Soldier or if the transfer is uncoordinated. If the case has been open for more than 45 days, the risk level is automatically set to medium.

Medium Risk Rules	High Risk Rules
Case is over 45 days old	*Uncoordinated* radio button is selected
Case Risk Notes exist	New Address is not completed
	Work Contact Name is null or *Unemployed* is selected
	Case is inactive for over 30 days
	Case is over 60 days old

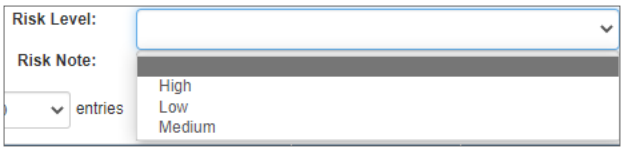
Override Risk Levels

IST Help Desk Admin users are able to override a risk level from the *Risk Factors* tab.

1. In the *Case Details* (fourth) panel, click the **Risk Factors** tab.
   - The *Risk Factors* tab opens, displaying previously entered Risk Factors.



2. Select a new *Risk Level* from the drop-down menu.



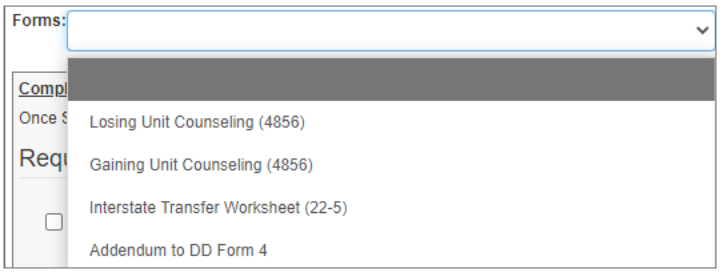
Note - You cannot override the risk level if the case has been open for more than 60 days.

3. Click **OVERRIDE RISK LEVEL**.
   - The risk level is updated and added to the risk history table; the screen is refreshed.

10.4.2 Forms

You can view and complete certain forms from within the RMS User Guide case. Form data is composed of Soldier data, data collected for the IST case, and user input. All form data can be saved within the IST case. The form data can also be viewed, saved, and printed in PDF format.

1. Select the desired form from the *Forms* drop-down list at the top of the *Case Details* tab.



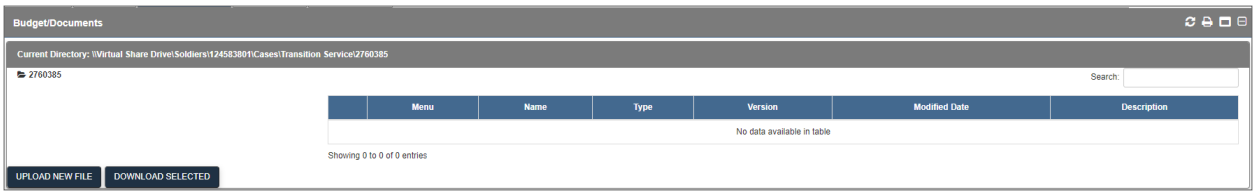
2. Click **VIEW FORM**.
   - The form content opens in a new window.
3. Fill out the form with the appropriate information and click **PRINT PDF**.
   - The selected form can be opened or saved to your Downloads folder as a PDF.

10.5 Transition Services Additional Actions

The following additional actions are available for Transition Services cases.

10.5.1 Budget/Documents

The *Budget/Documents* tab allows you to filter, download, and upload files pertaining to the selected Soldier. It also contains any of the Soldier's budget documents previously uploaded.



10.5.1.1 Download a File

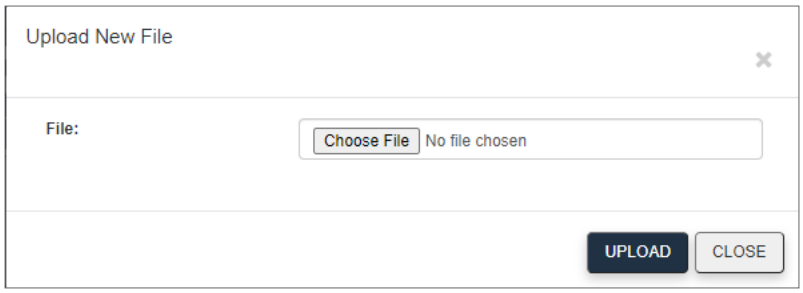
1. Check the check box(es) of the file(s) that you want to download.

> **Note -** If more than one file is selected, the files are downloaded as a zip file.

2. Click **DOWNLOAD SELECTED** at the bottom of the screen. The file(s) are downloaded.

10.5.1.2 Upload a Single File

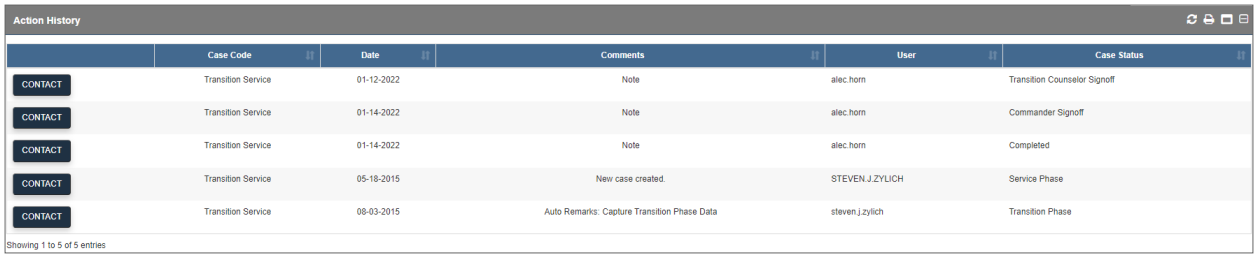
1. Click **UPLOAD NEW FILE**.
   - The *Upload File* dialog box opens.



2. Click **Choose File**.
3. Navigate to the file, and click **Open**.
   - The *File* field is populated with the name of the file.
4. Click **UPLOAD**.
   - The file is uploaded.

10.5.2 Action History

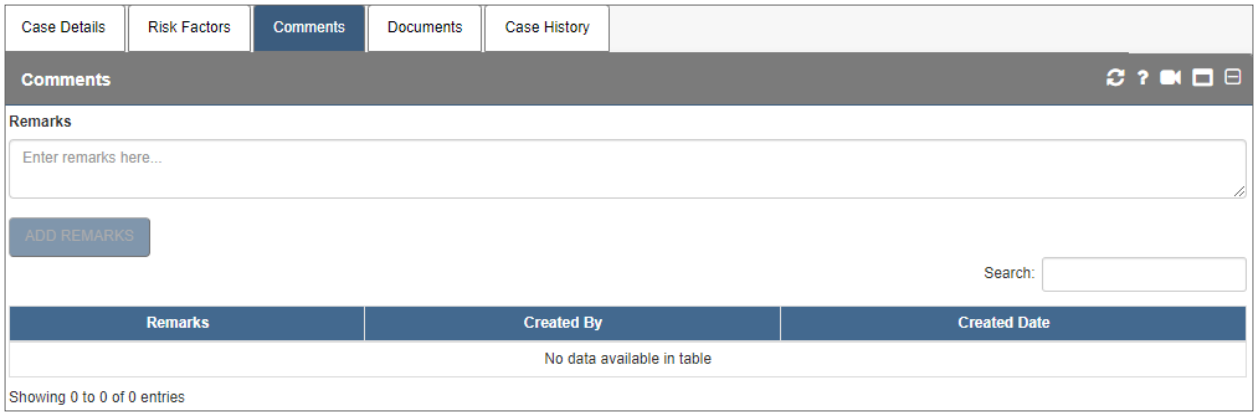
1. In the *Case Details* (fourth) panel, click the **Action History** tab.
   - The *Action History* tab opens, displaying information about previous actions completed for this Soldier.



10.6 Comments

The *Comments* tab appears for IST and Transition Services cases.

1. Click the **Comments** tab in the *Case Details* (fourth) panel.
   - The tab opens, displaying any comments previously entered about the case.



2. Enter comments in the *Remarks* field.
3. Click **ADD REMARKS**.
   - The comment is displayed at the bottom of the tab.

10.7 Sponsorship Additional Actions

The following additional actions are available for Sponsorship cases.

10.7.1 Case Remarks

The *Case Remarks* tab stores and displays remarks related to the case.

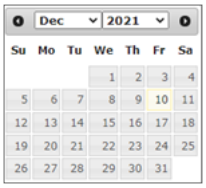
1. To add a remark, enter text in the *Remarks* field and click **ADD REMARKS**.
2. The grid at the bottom of the tab is updated with the entered remark.

10.7.2 Sponsor Contact

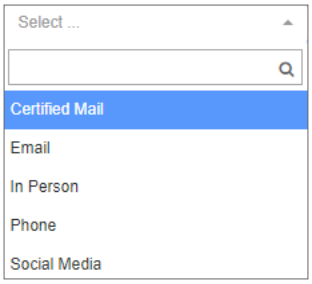
You can add new sponsor contact information to the case from this tab.

1. Click the **Add** icon.
   - The *Add Sponsor Contact* window opens.

2. If the date of contact was not today, select a date by clicking the calendar icon .



3. Select the method of contact from the *Contact Type* drop-down list.



4. Describe the contact in the *Comment* text box.
5. Click +**ADD**.

11 Contacting the Help Desk

You can contact the Help Desk in one of two ways:

1. Call 1-855-249-9311.
2. Email mailto:ng.ncr.arng.mbx.rcms-g@mail.mil

When contacting the Help Desk, please include the name of the module and a brief description of what you were doing before receiving an error message within the module.

12 Glossary of Icons

These are all of the icons encountered throughout the RMS User Guide product.

Case Management Icons	Function
	Refresh
	Show/hide the filter fields above the columns
	Print
	Export to CSV
	Export to Excel
	Closes the current panel
	Closes all tabs currently open for just the selected panel
	Toggle section
	Toggle full screen
	Maximize section
	Displays the look up values for a particular field
	Show DEI
	Help
	Video

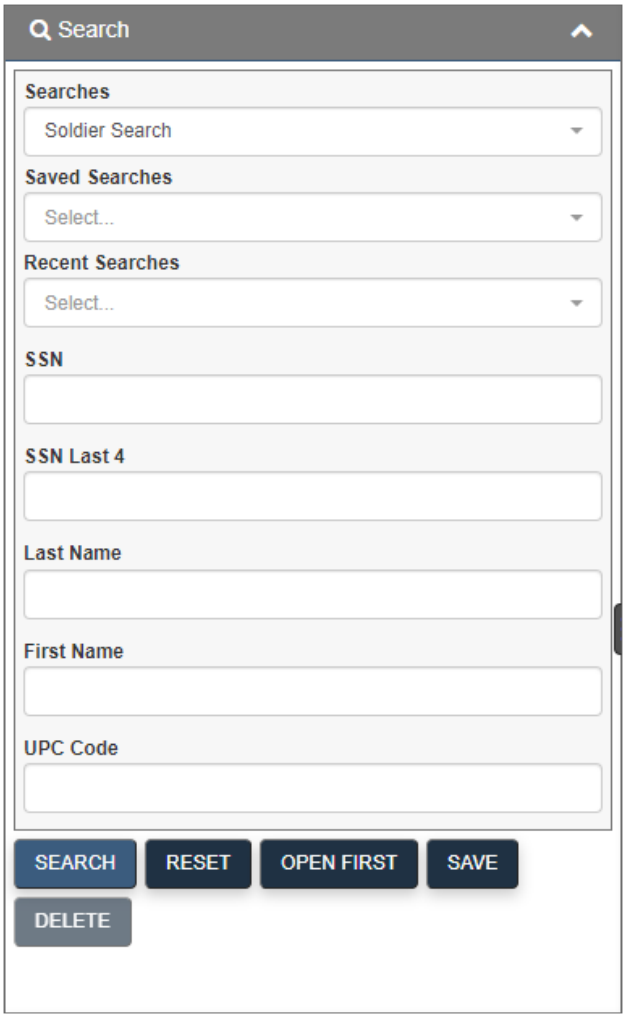
13 Additional Tools

Additional Tools explains additional functionality included within RMS, including the *Search* and *Reports* sections.

13.1 Search

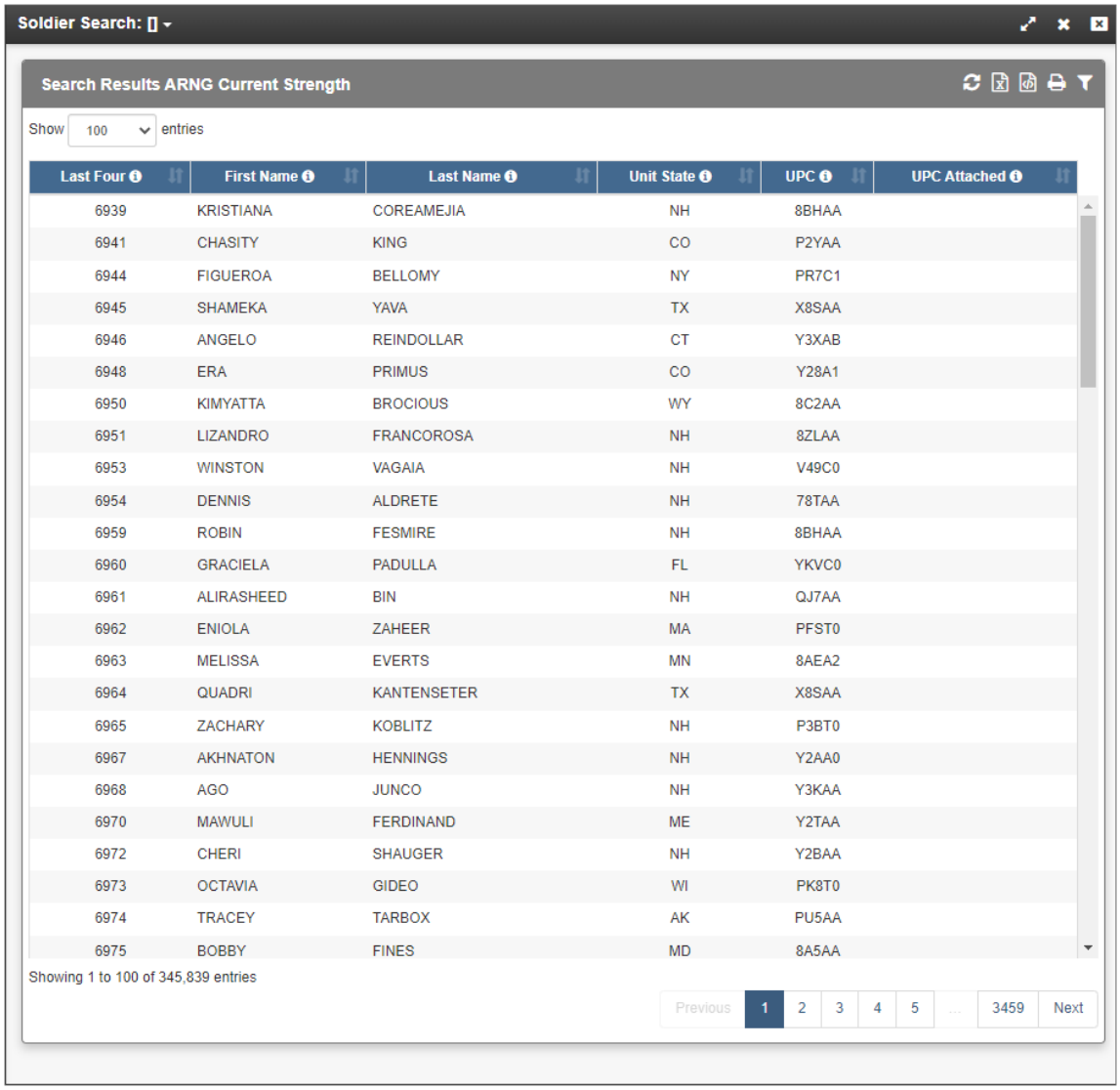
You can search for Soldiers within the module by selecting the *Search* tab from the *Command Center*, and then choosing the appropriate *Search Type*. (See **Soldier Roster Tools** on page 68 for more information about options in the search results panel.)

13.1.1 Soldier Search



1. Enter information into any of the available fields—*SSN*, *SSN Last 4*, *Last Name*, *First Name*, or *UPC Code*.

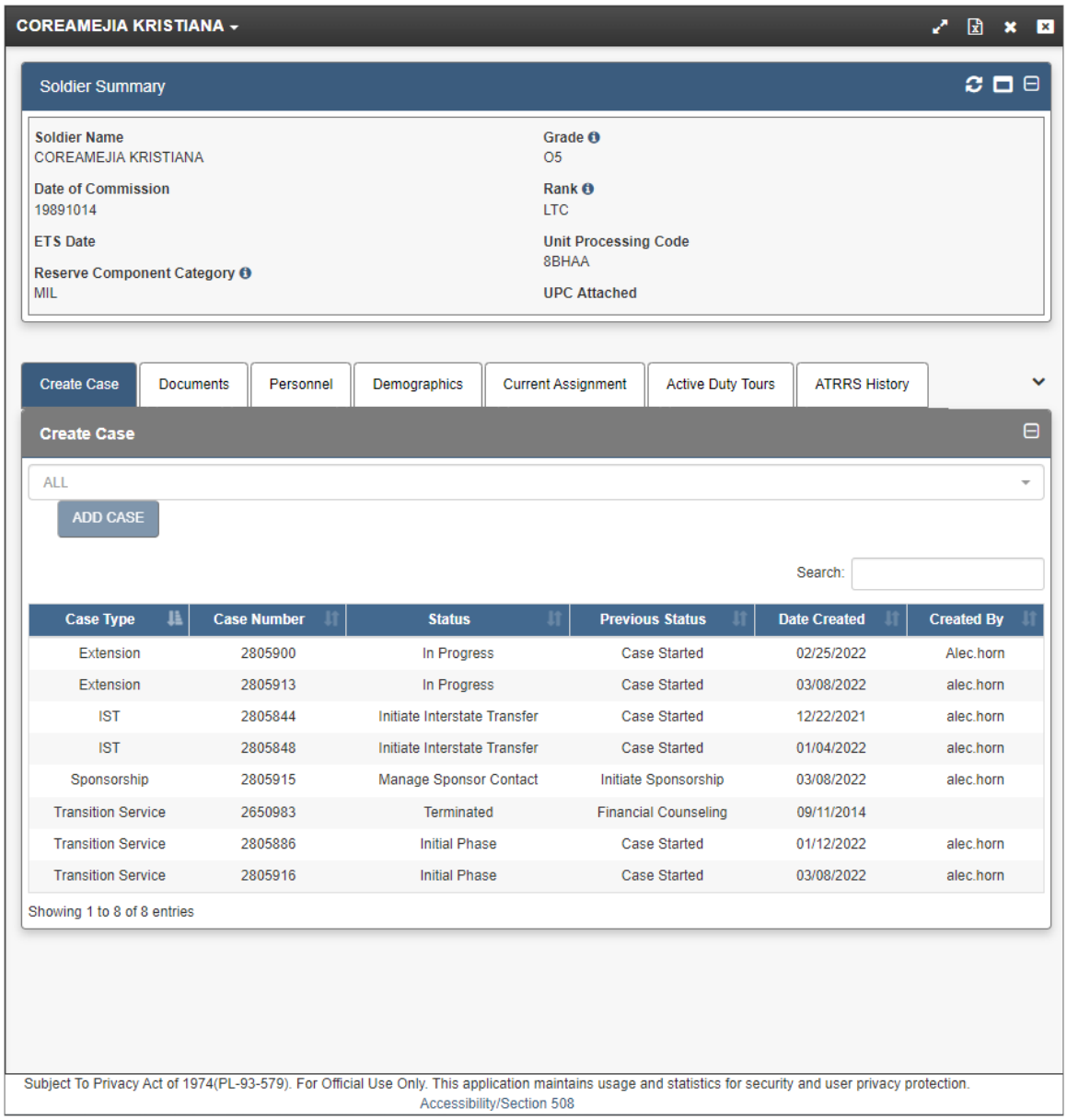
2. Click **SEARCH**.
   - The second panel displays a list of Soldiers matching your search criteria.



Last Four	First Name	Last Name	Unit State	UPC	UPC Attached
6939	KRISTIANA	COREAMEJIA	NH	8BHAA	
6941	CHASITY	KING	CO	P2YAA	
6944	FIGUEROA	BELLOMY	NY	PR7C1	
6945	SHAMEKA	YAVA	TX	X8SAA	
6946	ANGELO	REINDOLLAR	CT	Y3XAB	
6948	ERA	PRIMUS	CO	Y28A1	
6950	KIMYATTA	BROCIOUS	WY	8C2AA	
6951	LIZANDRO	FRANCOROSA	NH	8ZLAA	
6953	WINSTON	VAGAIA	NH	V49C0	
6954	DENNIS	ALDRETE	NH	78TAA	
6959	ROBIN	FESMIRE	NH	8BHAA	
6960	GRACIELA	PADULLA	FL	YKVC0	
6961	ALIRASHEED	BIN	NH	QJ7AA	
6962	ENIOLA	ZAHEER	MA	PFST0	
6963	MELISSA	EVERTS	MN	8AEA2	
6964	QUADRI	KANTENSETER	TX	X8SAA	
6965	ZACHARY	KOBLITZ	NH	P3BT0	
6967	AKHNATON	HENNINGS	NH	Y2AA0	
6968	AGO	JUNCO	NH	Y3KAA	
6970	MAWULI	FERDINAND	ME	Y2TAA	
6972	CHERI	SHAUGER	NH	Y2BAA	
6973	OCTAVIA	GIDEO	WI	PK8T0	
6974	TRACEY	TARBOX	AK	PU5AA	
6975	BOBBY	FINES	MD	8A5AA	

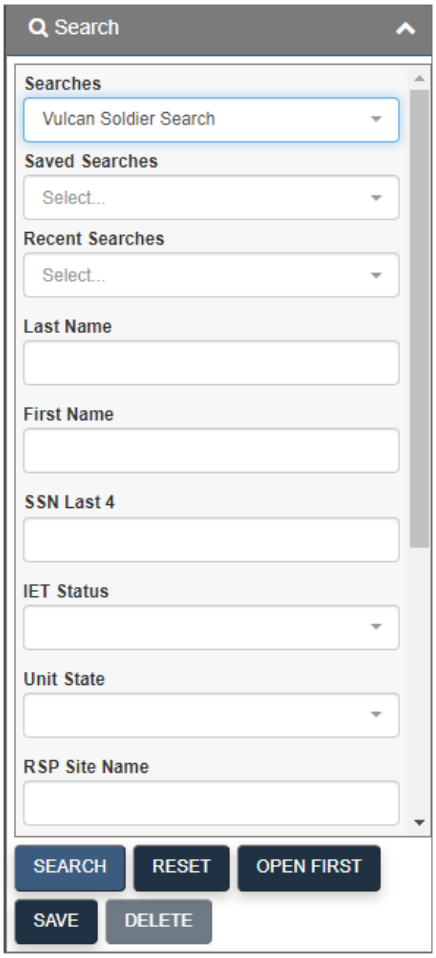
3. Click a Soldier's name to view more information about the Soldier.

- The third panel opens.



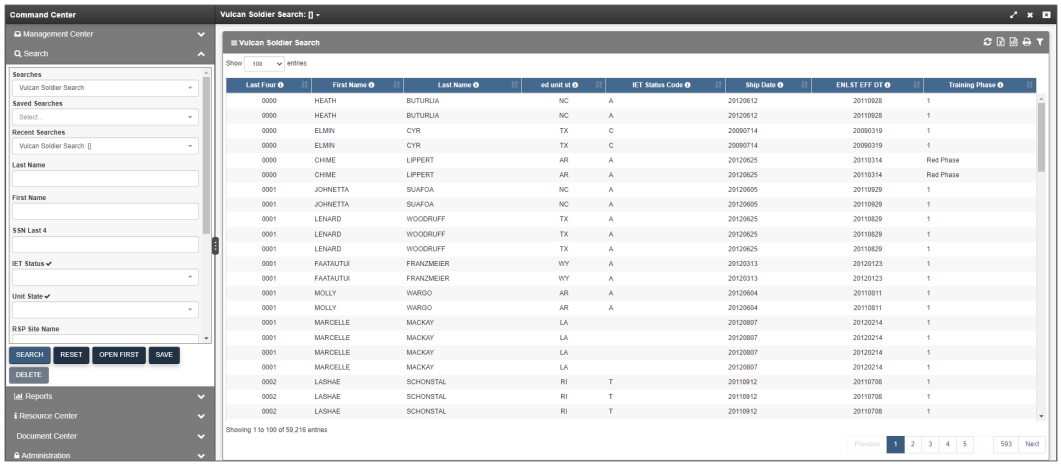
Note - Some tabs may be hidden when the panel opens. Click the arrow icon to view them.

13.1.2 Vulcan Soldier Search

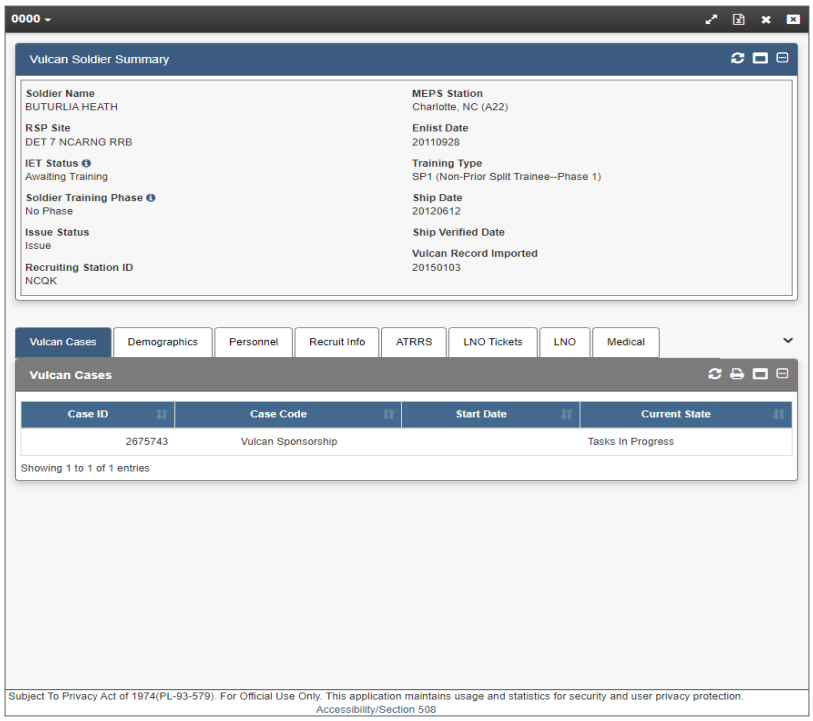


1. Enter information into any of the available fields and drop-down lists—*Last Name*, *First Name*, *SSN Last 4*, *IET Status*, *Unit State*, *RSP Site Name*, *Soldier Issue Status*, *RSID*, *Disposition*, *RSP Site UPC CD*, or *Training Phase*.
2. Click **SEARCH**.

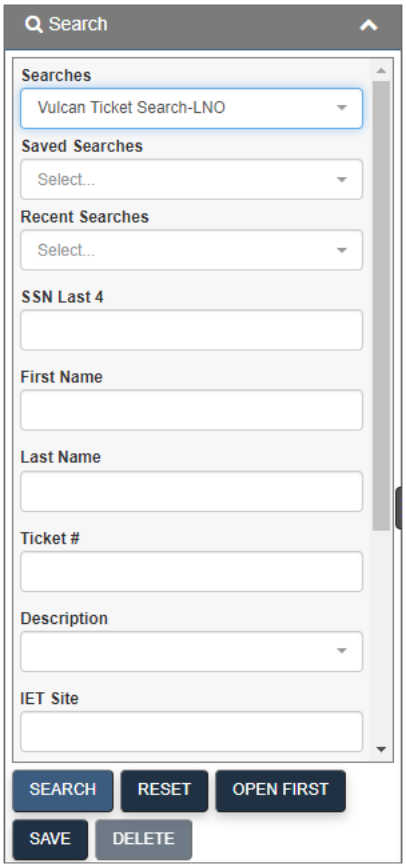
- The second panel displays a list of Soldiers matching the input parameters.



3. Click a Soldier's name to view more information about the Soldier.
   - The third panel opens.

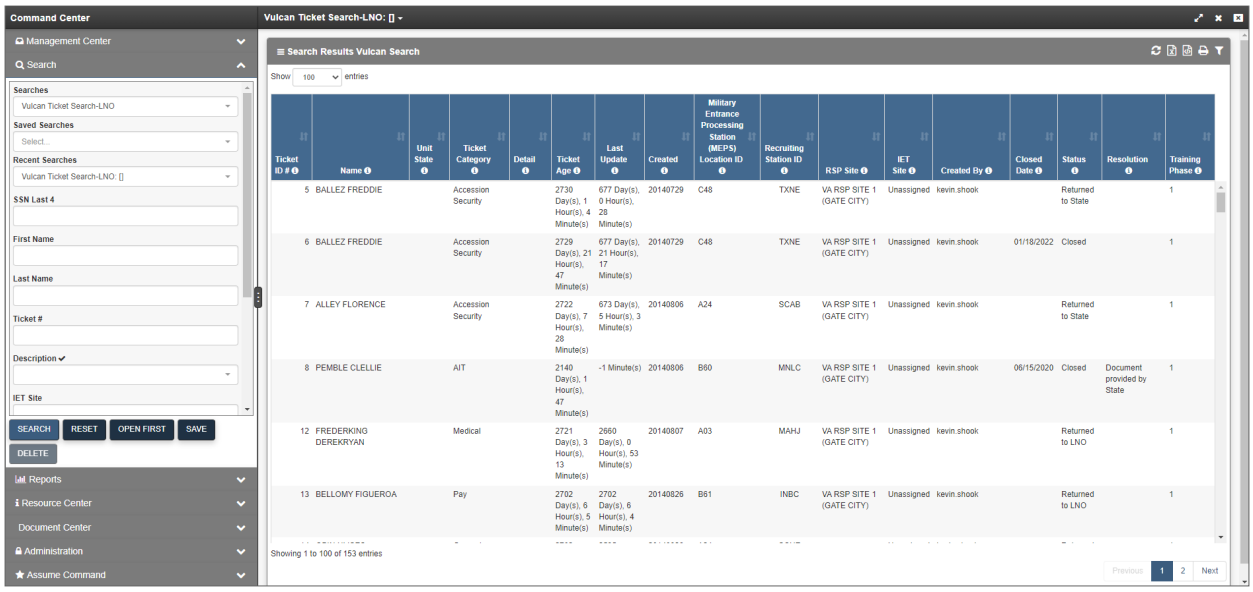


13.1.3 Vulcan Ticket Search-LNO

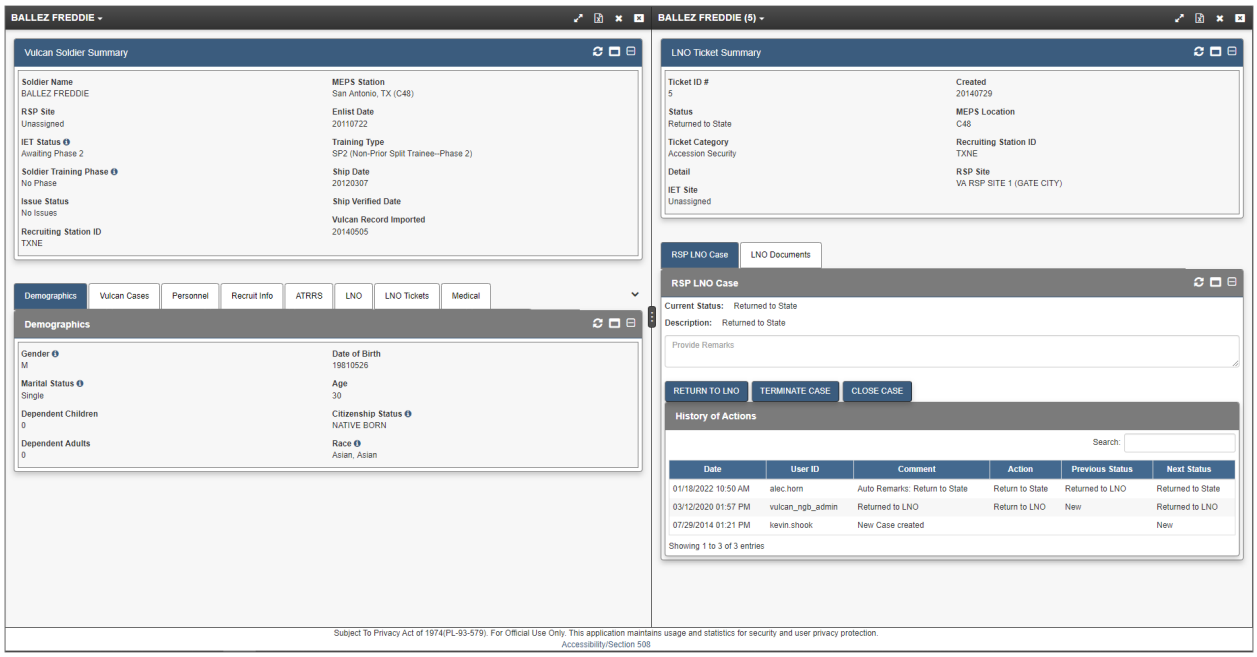


1. Enter information into any of the available fields and drop-down lists—*SSN Last 4*, *First Name*, *Last Name*, *Ticket #*, *Description*, *IET Site*, *Created By*, *Closed Status*, *Date Created*, or *Unit State*.
2. Click **SEARCH**.

- The second panel displays a list of Soldiers matching the input parameters.



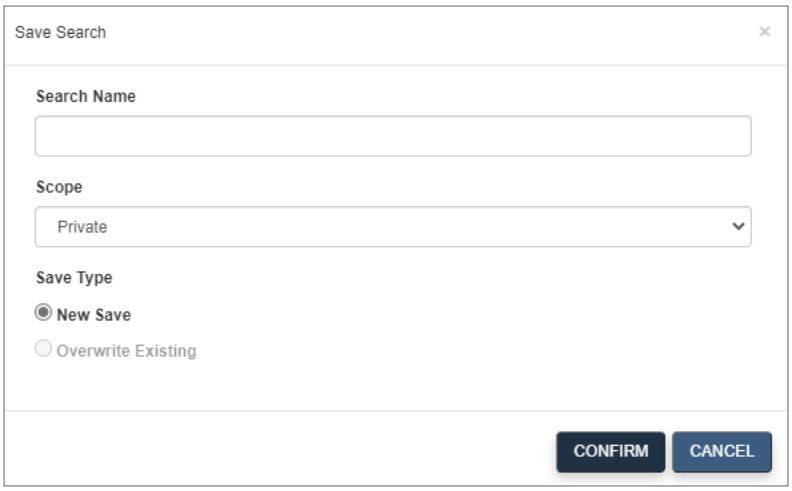
3. Click a Soldier's name to view more information about the Soldier and the LNO ticket.
   - The third and fourth panels open.



Tip - See **LNO Module** on page 154 for more information about LNO tickets.

13.1.4 Save a Search

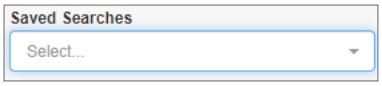
1. Click **SAVE** after entering search parameters to save a search for later use.



2. Enter a name for the search.
3. Choose the *Scope* for the search, either Private or Public.
4. Choose to overwrite an existing save, or save the search as something entirely new.
5. Click **CONFIRM**.
   - The search is saved and can be used again by clicking the *Saved Searches* drop-down menu.

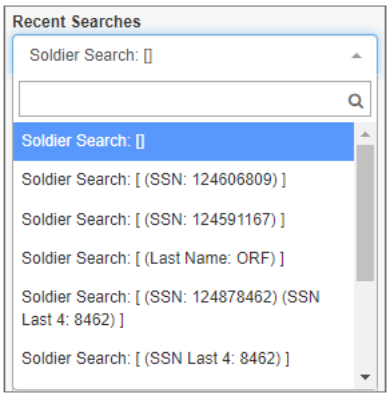
13.1.5 View Saved Searches

From the *Saved Searches* drop-down menu, you can choose to view the criteria for any previously saved search.



13.1.6 Recent Searches

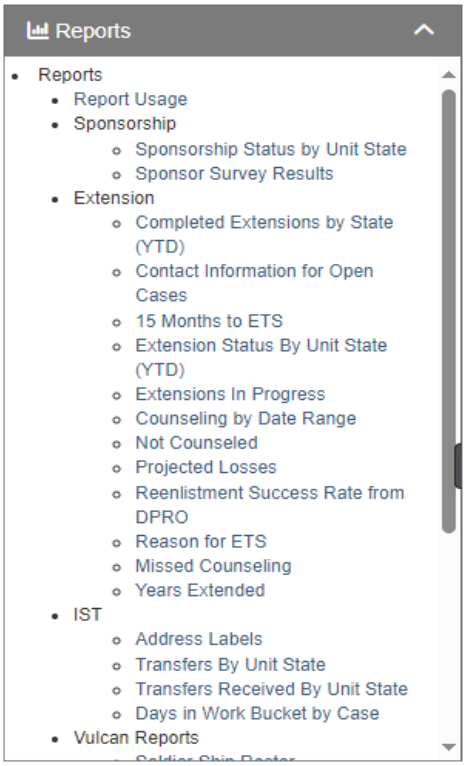
From the *Recent Searches* drop-down menu, you can view the search criteria from your recent searches.



13.2 Reports

Reports are a central tool in RMS User Guide. They display data in a tabular format and provide many options for customization. In general, reports allow you to view information tailored to your needs at the scope that makes sense for your subject of interest. They provide a user-friendly way to access detailed information on nearly any data used in RMS User Guide.

You can view reports within the module by selecting the *Reports* tab from the Command Center, and then choosing the appropriate folder.



13 Additional Tools

This section of the user guide explains how to navigate and work within a report. The functions described here are available for all reports, regardless of how they were generated.

13.2.1 The Reports Screen

At the top of every report screen you can find the **APPLIED FILTERS, DIMENSION INFORMATION,** and **MEASUREMENT INFORMATION** buttons. These give information about the report and options for modifying it. The report itself occupies the remainder of the screen.

13.2.2 Data Marts

Reports can run directly against a data mart or can link directly to a data mart. All reports either represent a portion or portions of data mart data. A data mart is a central source for data pertaining to a certain focus. Each data mart defines the dimensions and measurements available to you as well as the roll-up definitions (table joins) that derive the information. Data marts pull their data from select source tables, which define how a user or report queries against them.

13.2.3 Report Information

The section at the top-left side of Panel 2 contains the title of the report and a short description of the information contained therein. The *MEASUREMENT INFORMATION* section describes the numeric values being presented (e.g., Assigned Strength), usually as columns in the report. The *DIMENSION INFORMATION* section identifies the other field elements being displayed in the report, often grouped as row values (e.g., Unit State) and/or filters (e.g., Run Date).

> **Tip -** See **Measurements** below or **Dimensions** below for more information.

13.2.3.1 Measurements

Measurements are fields that represent a numeric count (e.g., a sum total) or mathematical function (e.g., an average value or the percentage of a population) of something being analyzed. They are typically derived from information stored as binary (yes/no) values in the Data Store at the individual record level-of-detail.

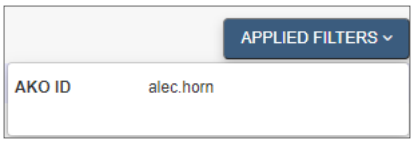
Examples of data stored as measurements include total assigned strength, total gains over a given period of time, MOS-qualified personnel, average age, and an organization's loss rate.

13.2.3.2 Dimensions

Dimensions are fields with values that are typically grouped to form a basis of comparison (e.g., male vs. female), or are used to filter or parse data (e.g., unit state = Virginia). Since they are not typically represented with binary "Yes/No" values, dimensions cannot be directly summed; rather, they are used in combination with various measurements (e.g., total missions, etc.) to produce your result matrix. For example, consider "gains" (measurement) by "unit state," or "assigned strength" (measurement) by "gender" (dimension). Dimension values are typically represented as rows in a given report, although they can also appear as columns in a cross-tab report.

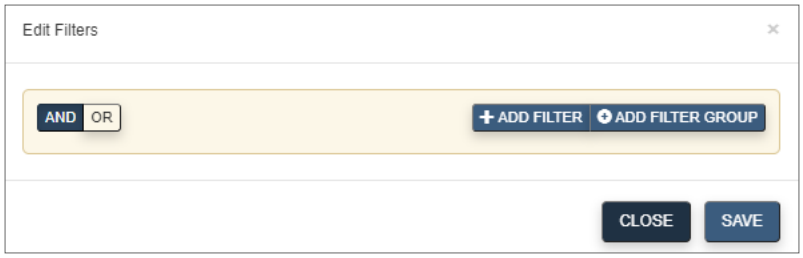
13.2.4 Applied Filters

The **APPLIED FILTERS** button displays the current filter on the report, if applicable. Any additional filters you apply appear when you click it, as do any drill-down criteria you add.



13.2.4.1 Editing a Filter

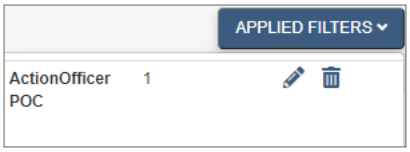
1. Click the **Edit Filters** button to change the parameters of one of the filters.
   - The *Edit Filter* screen appears. Click **ADD FILTER**. A drop-down menu appears.



2. To update the filter, select an operator from the drop-down list.
3. Next, select the value by which to filter the report.
4. Click **SAVE** to confirm your selections.
   - The updated report appears.

13.2.4.2 Deleting a Filter

Click the **Delete Filter** icon under **APPLIED FILTERS.** Then click **DELETE** in the confirmation window.



- The updated report appears.

Note - This option is not available for the *Run Date* filter, which must appear on all reports.

13.2.5 Report Tools

Report tools are displayed at the top of the panel beneath the report information buttons. They include various options for editing, saving, and viewing a report.

The following table explains each of the icons that can be found in the *Reports* blade. Icons with complex functions are explained in greater depth in their own section of the user guide.

Note - Available icons may vary among products.

Button	Result
	A *Save Report* dialogue screen appears.
	The report is emailed to the email account associated with your profile.
	A pop-up window appears with options for subscribing to the report.
	A pop-up window appears with basic options for editing an aggregate report.
	A pop-up window appears with in-depth options for editing an aggregate report.
	The base report appears.
	A collection of dashboards appear, displaying the information from your report.
	A pop-up window appears with instructions for exporting the report data to a Microsoft Excel spreadsheet.
	A pop-up window appears with instructions for exporting the aggregate and base reports as separate tabs in a Microsoft Excel spreadsheet.
	View advanced options for sorting the report.
	A pop-up window appears with instructions for exporting the report data to a Microsoft Excel Comma Separated Values File.
	The *Report Builder* screen appears. It allows you to select specific measurements, dimensions, and filters to include within the base report.
	A pop-up window appears displaying Formation View for the selected metric and POD or UPC.
	A chart displaying the information from your report appears.

	View the report's data.
	Print the report.
	A pop-up window appears with *Dimensions* and *Measurements* panels explaining the data in your report.
	A pop-up window appears with an email to send to all Soldiers returned by a base report. For more, see **Report Email Notification** on page 1. This icon is only available to specific users.
	A pop-up window appears displaying the SQL code.
	A pop-up window appears displaying Xml code.

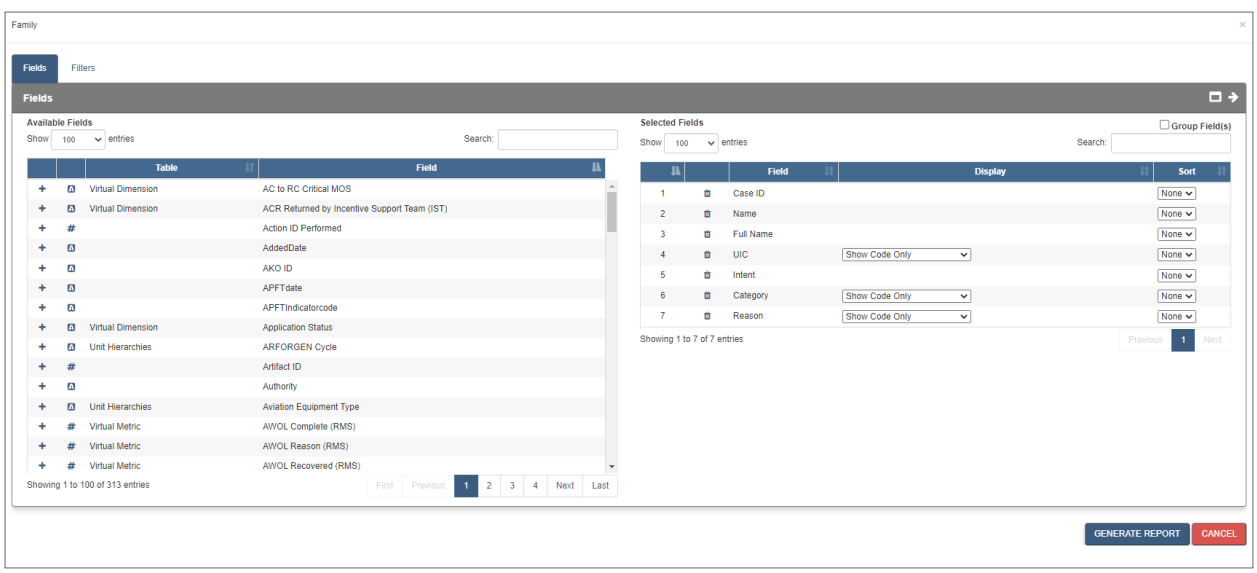
13.2.5.1 Report Builder

The *Report Builder* tool allows you to modify base reports (see **Aggregate and Base Reports** on page 218) with customized dimensions, measurements, and filters.

> **Note -** In RMS User Guide, filters determine what data you see and how it is configured in any given report, dashboard, or view.

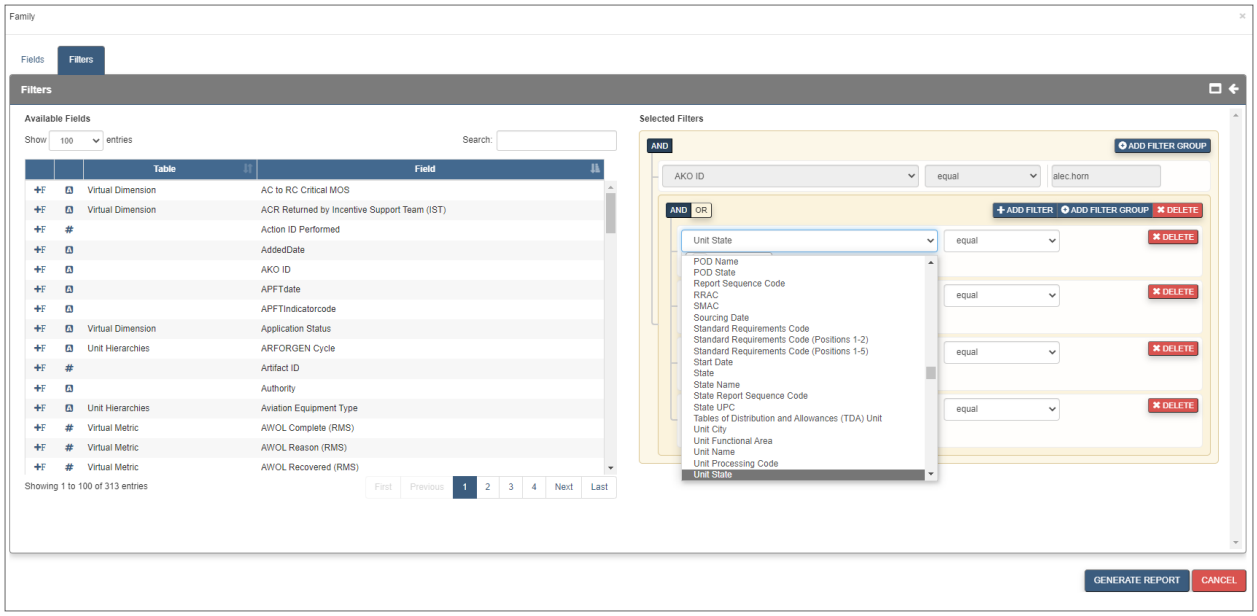
Building a Report with Report Builder

1. From within a base report, click the **Edit Base Report** button .
   - The *Report Builder* appears.

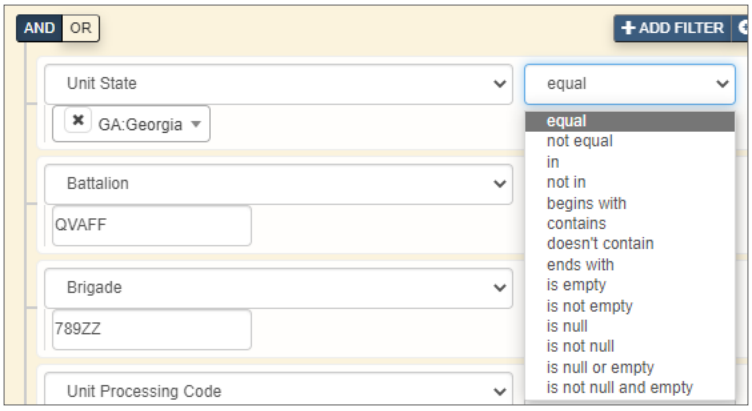


Note - The **Edit Base Report** button is not available in all base reports.

2. Optionally, view more information and filter the metrics and dimensions displayed in the *Fields* panel.
   - Type a metric or dimension name into either of the *Fields* text boxes. The list is now sorted to include only items that match your entry.
3. Add any element from the *Fields* panel to the *Selected Fields* panel to add it as a column in your report.
   - Click the + icon on an element in the *Fields* panel to add it to the *Selected Fields* panel.
   - Click the *Remove* icon on an element in the *Selected Fields* panel to remove it.
   - Change the *Sort* order of any field to ascending, descending, or none.
   - Change the primary, secondary, and additional sorts as needed by adjusting the number fields in the *Sort* column.
4. Add any element from the *Fields* list to the *Selected Filters* panel from the *ADD FILTER* drop-down to filter which results are returned in the report.
   - The *Select Operation* menu appears.



5. Choose an option from the *Select Operation* menu.



- If applicable, type a value in the text field that appears to complete adding this filter.

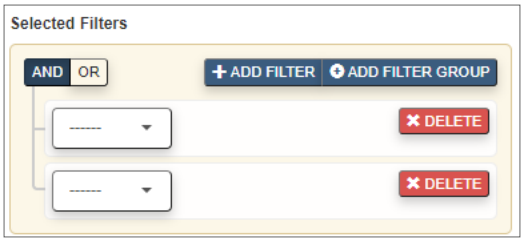
6. Repeat steps two through four as necessary.
7. Click **GENERATE REPORT**.
   - The report appears.

Grouping Filters

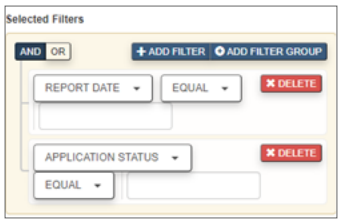
Adding a second filter groups the two filters together with a single operator (*And*/*Or*). Additional filters can be added to the group or to create a subgroup with a separate operator.

Note - The *Run Date* filter is not grouped with any other filters.

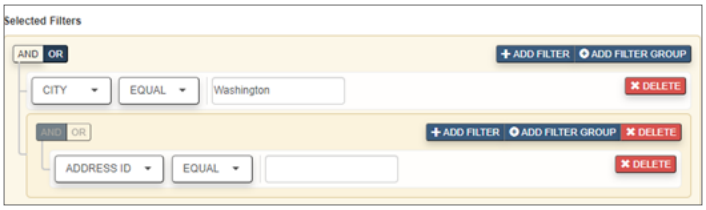
1. Click **ADD FILTER** to add an additional filter at the bottom of the *Selected Filter(s)* panel.



   - The filters are grouped with a single operator.



2. Click **ADD FILTER GROUP** to add an additional filter on top of another filter to create a subgroup.



- The subgroup is created with a separate operator.

Other Report Builder Actions

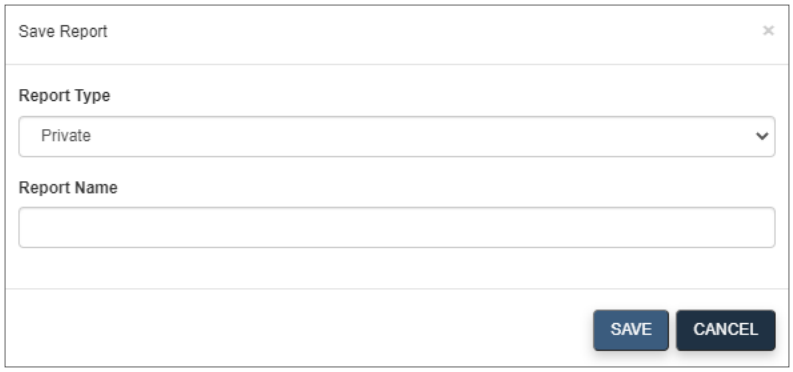
Task	Action
Delete an element from the *Selected Field(s)* or *Selected Filter(s)* panel	Click the **Remove** icon or click **DELETE**
Exit *Report Builder*	Click **Cancel**.

13.2.5.2 Sort the Report

To sort a report, click the header of the column by which you want to sort. Clicking the header more than once toggles between sorting in ascending order and descending order.

13.2.5.3 Save the Report

1. Click the **Save as New Report** icon .
   - The *Save Report* window opens.



> **Tip -** Saving a report saves the report specifications, including any preferences or filters you set for the report. When a saved report is opened, the report is populated with the latest data available.

2. In the *Report Type* drop-down list, select either **Private** or **Shared**. *Private* is for reports that only you can see and *Shared* are reports that everyone can see.
3. Enter a name in the *Report Name* text box and click **SAVE** to save the report.

13.2.5.4 Subscriptions in RMS User Guide

RMS User Guide provides access to many products and presentations through a subscription service that automatically sends the selected item(s) to your .milEnterprise email account.

Daily subscriptions are sent out every day between 8 p.m. and 6 a.m.

Weekly subscriptions are sent Monday through Friday between 6 p.m. and 6 a.m. (Monday's subscription email contains Friday data). If there are still weekly subscriptions in the queue after 6 a.m., they will be sent the following day(s) until all jobs have processed.

Monthly subscriptions are sent to the users beginning the first of each month and continue until all subscriptions are sent (meaning some users may receive their subscription on the second or third of the month or later). Monthly subscriptions contain end of month data for the previous month. If a user creates this type of subscription in the middle of the month they will receive one subscription immediately containing the data for the previous month. The job will then be scheduled as a normal Monthly subscription.

> **Note -** No new subscriptions will be generated on holidays and/or weekends, but any subscriptions that are still pending from the previous day will be sent out.

Subscribing from Reports

1. Select the desired report.
2. Drill down to the necessary level of detail, or click the **Go to Base Report** icon to view Soldier-level data.

   > **Tip -** Click the **Home** link to return to the unfiltered report.
   >
   > Home / Unit State : AK / POD :

3. Click the **Subscriptions** icon in the *Report Tools* section to open a *Subscriptions* menu.
4. Change the *Subscription Name*, *Frequency*, and *Output Format* of the subscription as necessary.
5. Click **SAVE**.

13.2.6 Drilling Down

Drilling down in a report allows you to view information at any scope, from the NGB to the Soldier level.

An example of drilling down in a report is listed below.

1. From any non-base report (see **Aggregate and Base Reports** below) click a link from the left-most column to drill down one level.

Case Type Code	Case Type Code - Description	Submitted	In-Progress	Completed	All Count
AA-AER	AA - Academic Evaluation Report (AER)	2	10	24	36
AA-AGR	AA - AGR	1	2	13	16
AA-BONUS	AA - Bonus	1	13	33	47
AA-DESP	AA	0	4	5	9
AA-DISCH	AA	1	6	4	11
AA-DOR	AA - DOR Adjustment	1	4	9	14
AA-LOD	AA - LODs	0	2	1	3
AA-MEB	AA - Request to be seen by MEB	0	0	2	2
AA-MGIB	AA - MGIB	0	4	1	5
AA-MOB	AA - Adjustment to MOB Report Date	0	2	1	3
AA-NCOER	AA - Noncommissioned Officer Evaluation Report (NCOER)	1	3	14	18
AA-OER	AA - Officer Evaluation Report (OER)	0	1	7	8
AA-OMPF	AA - Request for document removal from OMPF	0	5	2	7

Click a link from the left-most column.

   - The report reloads, filtered to show data for the selected group.
2. From here, click a specific Division to drill into information about the Brigadees in the chosen Division.
   - The report reloads, filtered to show data for the selected Division grouped by Brigade.
3. Continue to drill down in this way until the report is a roster of Soldiers.
   - The report is now a base report. For more information about base reports, see **Aggregate and Base Reports** below.

Note - Not all reports have the same drilling order. The order depends on how the current report is configured. This general procedure, however, is accurate for drilling on any report.

13.2.7 Aggregate and Base Reports

Aggregate Reports

Aggregate reports are created when a set of values has a mathematical operation performed against it. Any report level above a Base Report is an aggregate report, particularly marked by multiple rows of data combined into a single row on a report, thus providing counts. Raw counts may represent a minimum, maximum or average. You see aggregated data as you drill down through the levels of a report until you arrive at the base report, at which point one row of data in the base report corresponds to one row of data in the database.

Unit State	Unit State - Description	Family	Education	Job	Medical	Financial	Legal	Transportation	Expectations Not Met	Communication	Morale	Religion	Flagged	Other
GA	Georgia	0	0	0	0	0	0	0	0	0	0	0	1	0
IA	Iowa	0	1	0	0	0	0	0	0	0	0	0	0	0
KS	Kansas	0	0	0	0	0	0	0	0	1	0	0	0	0
MA	Massachusetts	0	0	0	0	0	0	0	0	0	0	0	1	0
MI	Michigan	0	0	0	0	0	0	0	0	1	0	0	0	0
NY	New York	1	0	0	0	0	0	0	0	0	0	0	1	0
VA	Virginia	0	2	0	0	0	0	0	1	1	0	0	0	0
	Total	1	3	0	0	0	0	0	1	3	0	0	3	0

Base Reports

A base report, the lowest drilling level for any report, is a roster of items that make up the aggregate counts for all higher-level reports. There are two ways to access base reports directly from any report where you have permission to access it:

- Click the **Go To Base Report** icon .
- Click any of the blue numbers to the right of the column listing States.

> **Note -** If there is no further level of aggregate information to drill into, you cannot click on the value.

From within a base report, the *Report Tools* panel features a *Report Builder* icon instead of the standard *Basic Edit* and *Advanced Edit* icons associated with aggregate reports. For more information on Report Builder, see **Report Builder** on page 213.

13.2.8 Reports Glossary

See the table below for explanations of report terminology.

Term	Explanation
Aggregate Report	Aggregate reports are created when a set of values has a mathematical operation performed against it. Any report level above a Base Report is an aggregate report, particularly marked by multiple rows of data combined into a single row on a report, thus providing counts. Raw counts may represent a minimum, maximum or average. You see aggregated data as you drill down through the levels of a report until you arrive at the base report, at which point one row of data in the base report corresponds to one row of data in the database.
Base Report	The lowest drilling level for any report, a base report is a roster of the individual items that make up the aggregate counts for all higher-level reports. See **Aggregate and Base Reports** on the previous page.
Data Mart	Reports can run directly against a data mart or can link directly to a data mart. All reports either represent a portion or portions of data mart data. A data mart is a central source for data pertaining to a certain focus. Each data mart defines the dimensions and measurements available to you as well as the roll-up definitions (table joins) that derive the information. Data marts pull their data from select source tables, which define how a user or report queries against them.
Dimension	Dimensions are any field that's not measuring something. They are values stored as text codes in the Data Store. Since they do not represent binary "Yes/No" values, dimensions cannot be directly summed; however, in some instances, it may be possible to convert a dimension into a measurement for summing. Dimensions can be used to filter or group results. They can also be columns in any report. Examples of data stored as dimensions include age, civilian education level, gender, grade, rank,

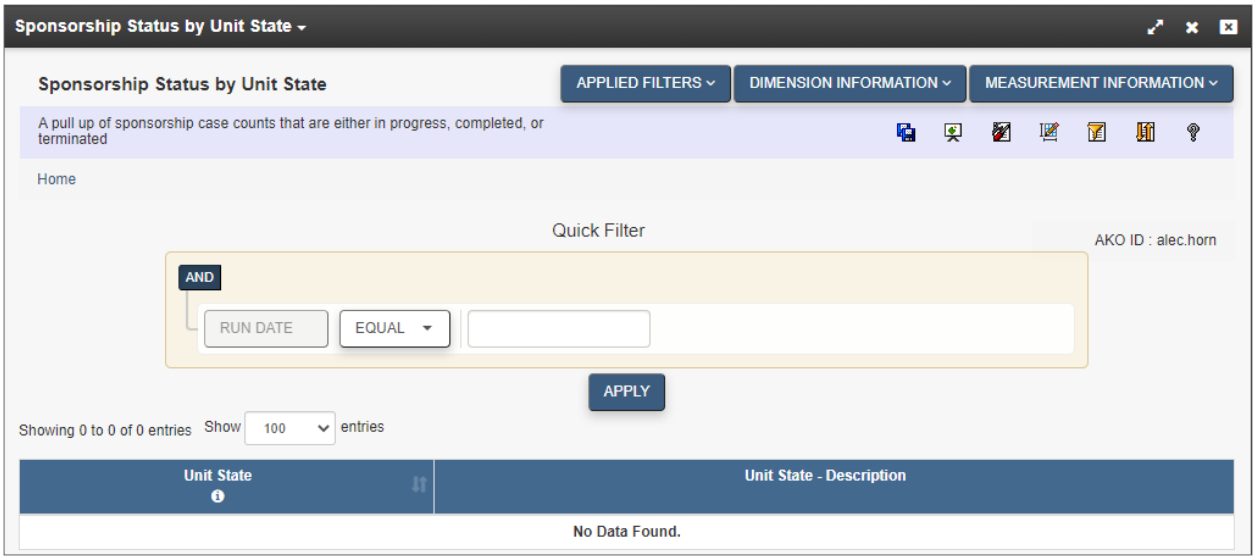
Term	Explanation
	and years in service.
Drill Down	Drilling down refers to clicking a link in the left-most column of a report to view the report's information at the level below. Users can continue to drill down until the report is a base report, which is usually a roster of items. Not all reports have the same drilling order. The order depends on how the current report is configured.
Field	Fields are all the available pieces of information around which you build your report. Any field can act as a selected field, a selected filter, or both. A selected field displays beside the Soldiers as a column in the report. A selected filter limits the items included in the report based on what you typed in the *Search* box.
Filter	Filters are any criteria used to limit the population of the report. Filters consist of a field or piece of metadata, along with a logical operator and a value on which to filter. You can apply any number of filters to any report, and only data that matches all filters is represented. Examples of filters include primary MOS equals 11B and run date is less than 20121015. Respectively, these filters limit your search to Soldiers coded as 11B and to data collected prior to October 15, 2012.
Measurement	Measurements define a count of an item to be analyzed. They are sums and rates derived from information stored as binary "Yes/No" values in the Data Store. Examples of data stored as measurements include assigned strength, total losses, and MOS qualified.
Metric	A metric is anything that can be counted. Metric and measurement can be used interchangeably.

13.3 Extension Reports

An overview of each report available for Extension is listed below.

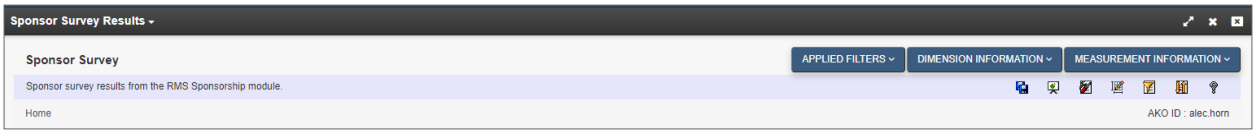
13.3.1 Sponsorship Status by Unit State

This report displays the number of Sponsorship cases in each status by state (in progress, completed, or terminated).



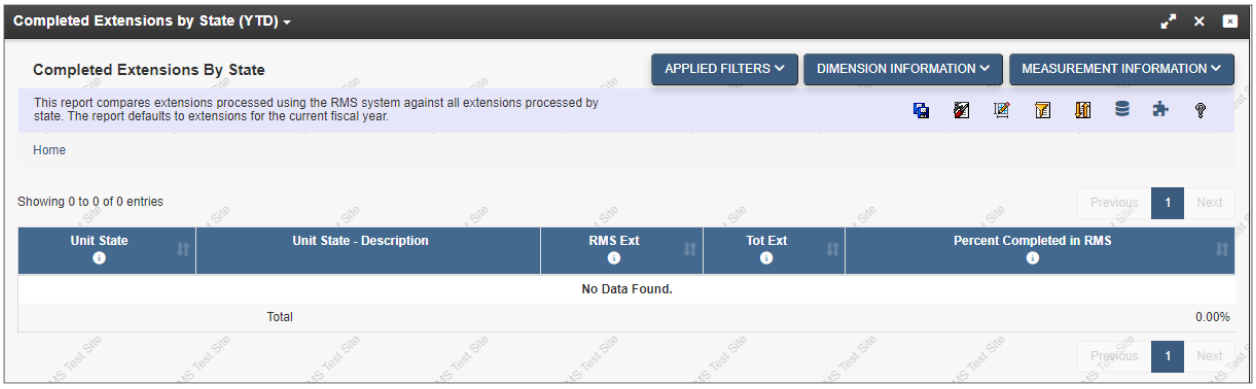
13.3.2 Sponsor Survey Results

This report displays the results of the Sponsor survey.



13.3.3 Completed Extensions by State (YTD)

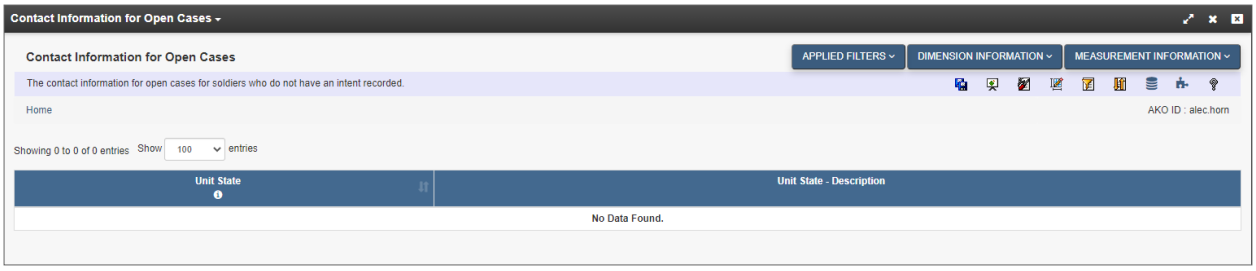
This report displays the number of extensions processed in each state through RMS, compared with the total number of extensions processed in each state. It includes a percentage column showing the percent completed in RMS.



13.3.4 Contact Information for Open Cases

This report displays the contact information for open cases for soldiers who do not have an intent recorded. You can click any number or state abbreviation to drill down to a roster of every case in that work bucket

status or state.



13.3.5 15 Months to ETS

This report displays by state the number of Soldiers who are eligible to extend and are within 0 to 450 days of their ETS date, the number of Soldiers ineligible to extend, and the total number of extension cases. Cases that are completed, currently waiting for signatures, or being reviewed by the Battalion, Brigade,

State, or IPPS-A are excluded from the report.

15 Months to ETS

15 Months to ETS Report

APPLIED FILTERS | DIMENSION INFORMATION | MEASUREMENT INFORMATION

RMS Eligible by ETS Date Datamart

Home

Showing 1 to 54 of 54 entries

Previous 1 Next

Unit State	Unit State - Description	Extension Eligible to Extend (RMS)	RMS Extension InEligible To Extend	Extension 0-450 Days (RMS)
AK	Alaska	0	354	354
AL	Alabama	0	1,908	1,908
AR	Arkansas	0	1,089	1,089
AZ	Arizona	0	1,246	1,246
CA	California	1	3,485	3,486
CO	Colorado	0	958	958
CT	Connecticut	0	562	562
DC	District of Columbia	0	223	223
DE	Delaware	0	317	317
FL	Florida	0	1,811	1,811
GA	Georgia	0	1,967	1,967
GU	Guam	0	260	260
HI	Hawaii	0	630	630
IA	Iowa	0	1,480	1,480
ID	Idaho	0	689	689
IL	Illinois	0	1,773	1,773
IN	Indiana	0	2,336	2,336
KS	Kansas	0	1,183	1,183
KY	Kentucky	0	1,396	1,396
LA	Louisiana	1	2,318	2,319
MA	Massachusetts	0	1,499	1,499
MD	Maryland	0	1,092	1,092

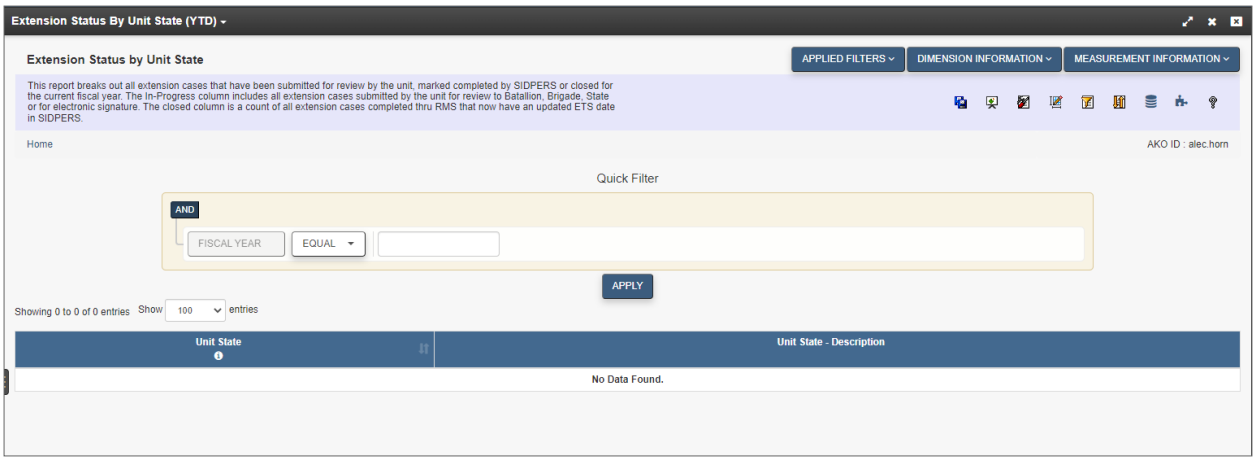
rivacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.

Accessibility/Section 508

13.3.6 Extension Status by Unit State (YTD)

This report displays by state the number of extension cases that have been submitted for review by the unit, the number awaiting action by IPPS-A, the number marked completed by IPPS-A, and the number closed for the current fiscal year. Each status has an accompanying percentage column, showing the user what

percentage of that state's cases are in that status.



13.3.7 Extensions in Progress

This report shows all the extensions that are currently being processed. Extensions being processed are extensions that are being reviewed by the Battalion, Brigade or State, extensions that are waiting for Soldier or Officer signatures, extensions waiting to be entered into IPPS-A and extensions that have been completed using RMS that are waiting for the IPPS-A feed to update their ETS date and move the case to

the closed work bucket.

Extensions In Progress

RMS Extensions in Progress

APPLIED FILTERS | DIMENSION INFORMATION | MEASUREMENT INFORMATION

This report shows all the extensions that are currently being processed. Extensions being processed are extensions that are being reviewed by the Battalion, Brigade or State, extensions that are waiting for Soldier or Officer signatures, extensions waiting to be entered into SIDPERS and extensions that have been completed using RMS that are waiting for the SIDPERS feed to update their ETS date and move the case to the closed workbucket.

Home

Show 100 entries

Showing 1 to 28 of 28 entries

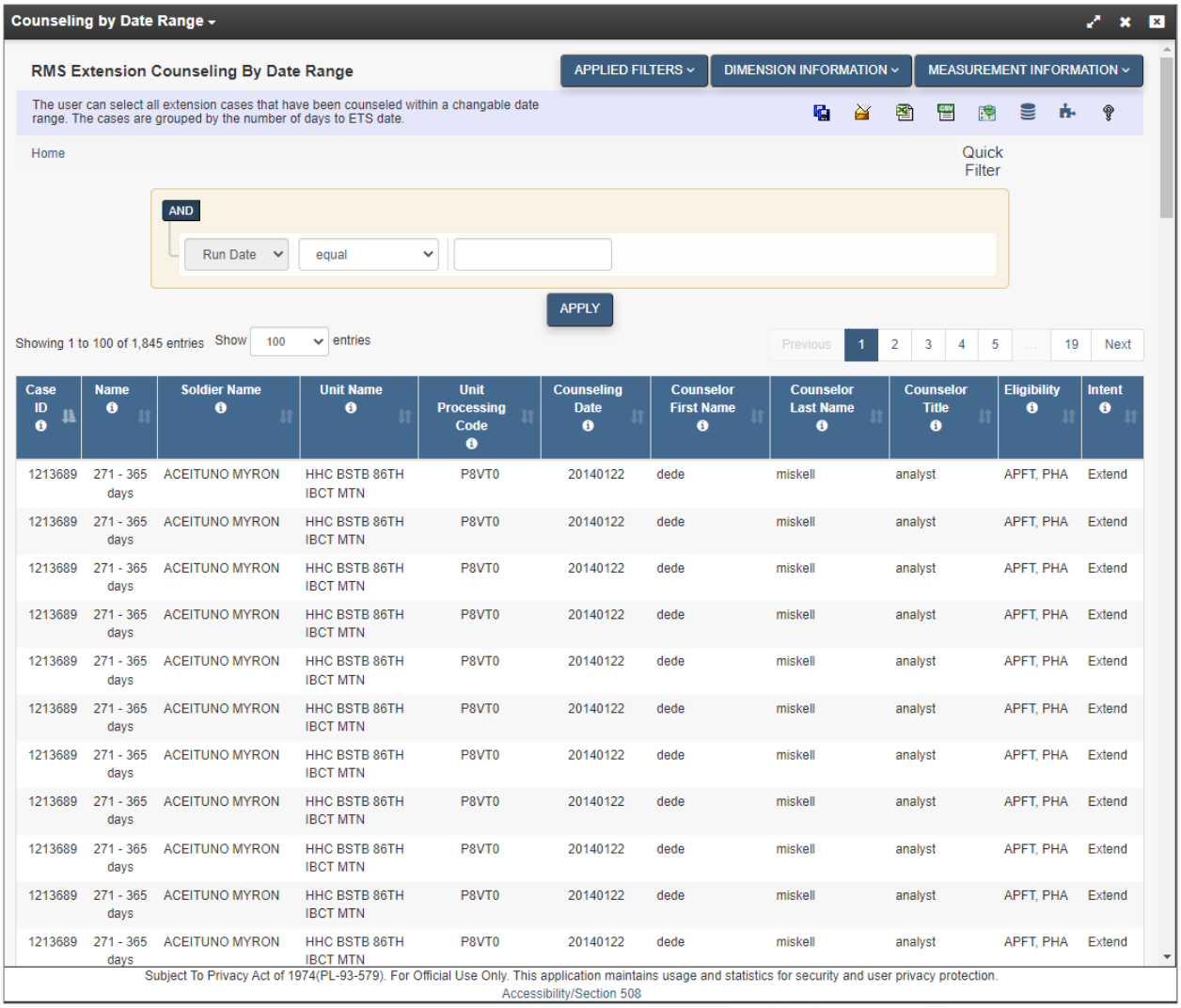
Unit State	Unit State - Description	BN	BDE	St	SIDPERS	Compl	Tot
AL	Alabama	42	0	0	0	38	80
CA	California	39	0	0	0	0	39
CT	Connecticut	0	40	0	0	0	40
FL	Florida	0	0	0	0	38	38
GA	Georgia	0	0	36	0	78	114
IL	Illinois	0	38	0	0	39	77
KS	Kansas	41	0	37	37	0	115
KY	Kentucky	38	0	0	0	0	38
LA	Louisiana	0	0	0	0	121	121
MA	Massachusetts	0	36	0	0	0	75
MD	Maryland	43	0	0	0	41	84
MN	Minnesota	0	0	0	0	38	38
MO	Missouri	0	0	39	0	0	39
MS	Mississippi	0	0	0	0	78	78
ND	North Dakota	0	0	41	0	37	78
NH	New Hampshire	0	0	0	0	38	38
NJ	New Jersey	38	0	0	0	0	38
NY	New York	0	0	0	0	38	38
OK	Oklahoma	0	0	37	0	0	37
OR	Oregon	36	0	0	0	0	36
PA	Pennsylvania	0	0	0	0	44	44
PR	Puerto Rico	0	36	0	0	0	36
SC	South Carolina	0	0	0	0	38	38

Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.

Accessibility/Section 508

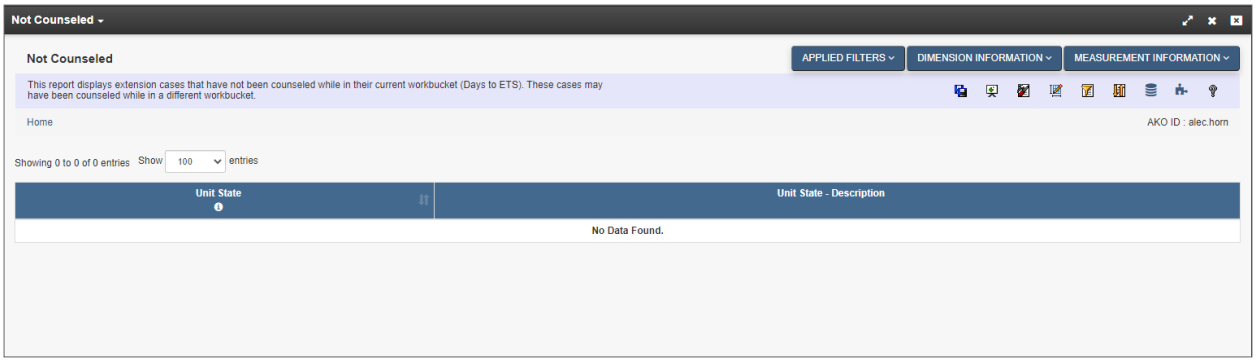
13.3.8 Counseling by Date Range

This report displays all extension cases that have been counseled within an adjustable date range, grouped by the number of days to ETS date.



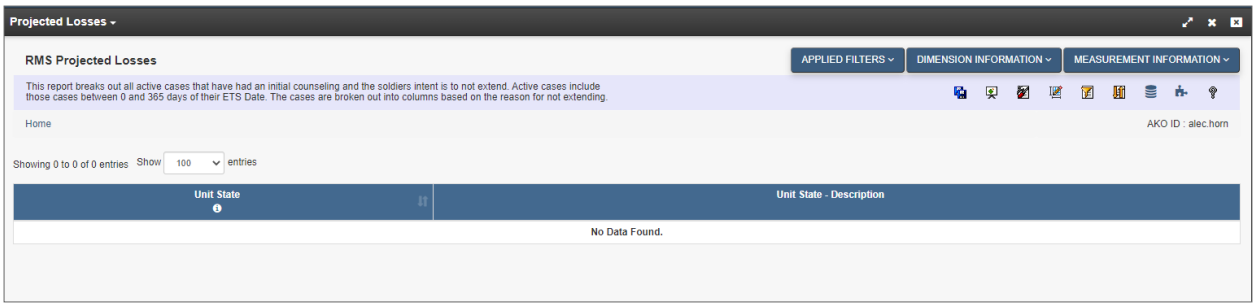
13.3.9 Not Counseled

This report displays by state the number of extension cases that have not been counseled while in their current work bucket, determined by the number of days to ETS. These cases may have been counseled while in a different work bucket.



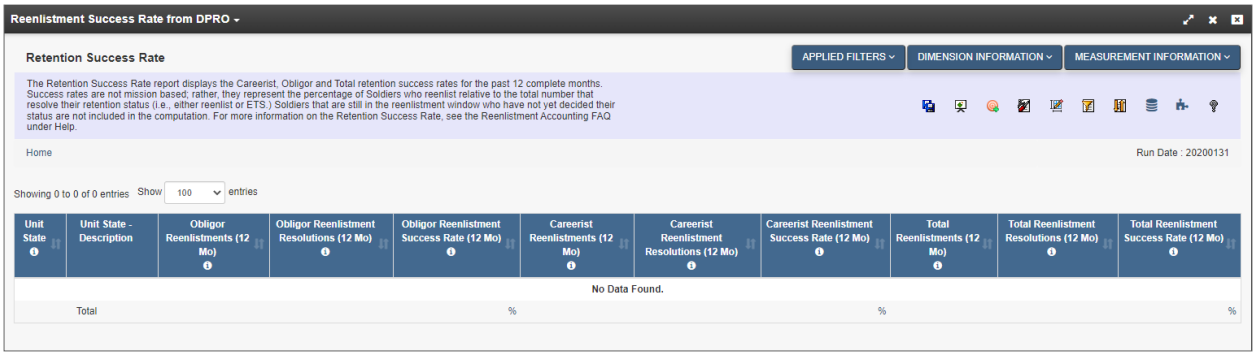
13.3.10 Projected Losses

This report shows the number of cases in each state that are projected losses. The columns in the report display the reason for why the Soldier is not extending and the total number of losses projected by that state.



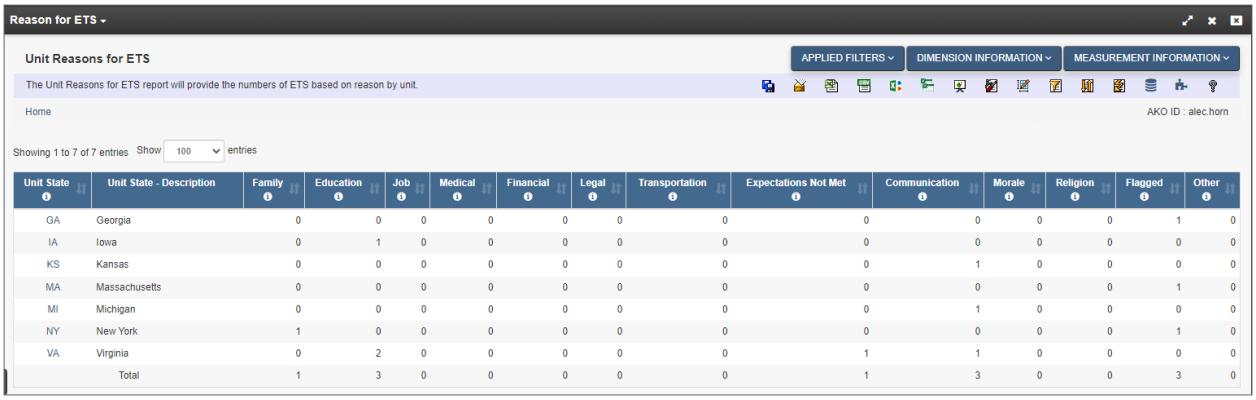
13.3.11 Reenlistment Success Rate from DPRO

This report displays the Careerist, Obligor and Total retention success rates for the past 12 complete months. Success rates are not mission based; rather, they represent the percentage of Soldiers who reenlist relative to the total number that resolve their retention status (i.e., either reenlist or ETS.) Soldiers that are still in the reenlistment window who have not yet decided their status are not included in the computation.



13.3.12 Reason for ETS

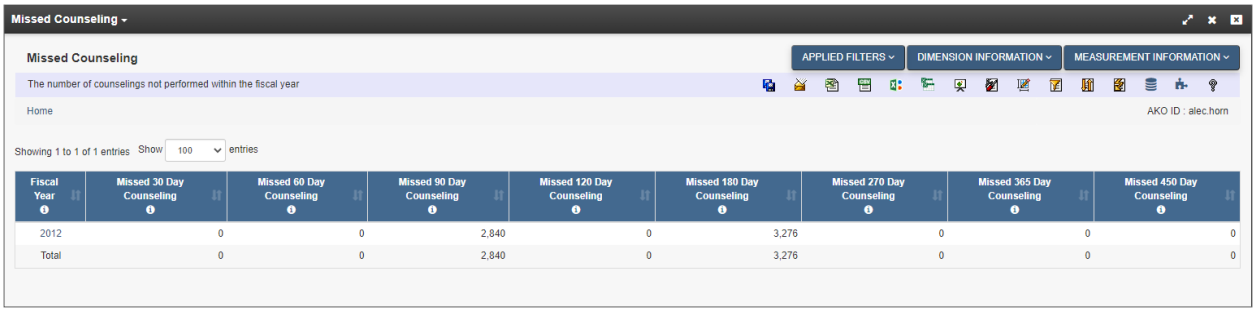
This report displays the numbers of ETS by unit based on reason category.



Unit State	Unit State - Description	Family	Education	Job	Medical	Financial	Legal	Transportation	Expectations Not Met	Communication	Morale	Religion	Flagged	Other
GA	Georgia	0	0	0	0	0	0	0	0	0	0	0	1	0
IA	Iowa	0	1	0	0	0	0	0	0	0	0	0	0	0
KS	Kansas	0	0	0	0	0	0	0	0	1	0	0	0	0
MA	Massachusetts	0	0	0	0	0	0	0	0	0	0	0	1	0
MI	Michigan	0	0	0	0	0	0	0	0	1	0	0	0	0
NY	New York	1	0	0	0	0	0	0	0	0	0	0	1	0
VA	Virginia	0	2	0	0	0	0	0	1	1	0	0	0	0
	Total	1	3	0	0	0	0	0	1	3	0	0	3	0

13.3.13 Missed Counseling

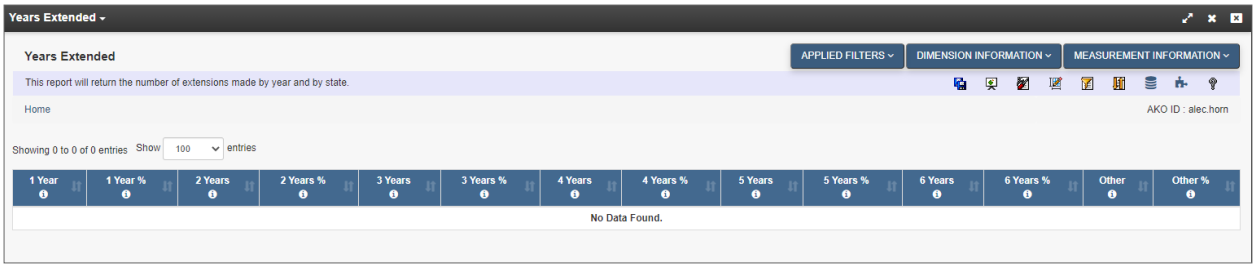
This report displays the numbers of counselings not performed within the fiscal year.



Fiscal Year	Missed 30 Day Counseling	Missed 60 Day Counseling	Missed 90 Day Counseling	Missed 120 Day Counseling	Missed 180 Day Counseling	Missed 270 Day Counseling	Missed 365 Day Counseling	Missed 450 Day Counseling
2012	0	0	2,840	0	3,276	0	0	0
Total	0	0	2,840	0	3,276	0	0	0

13.3.14 Years Extended

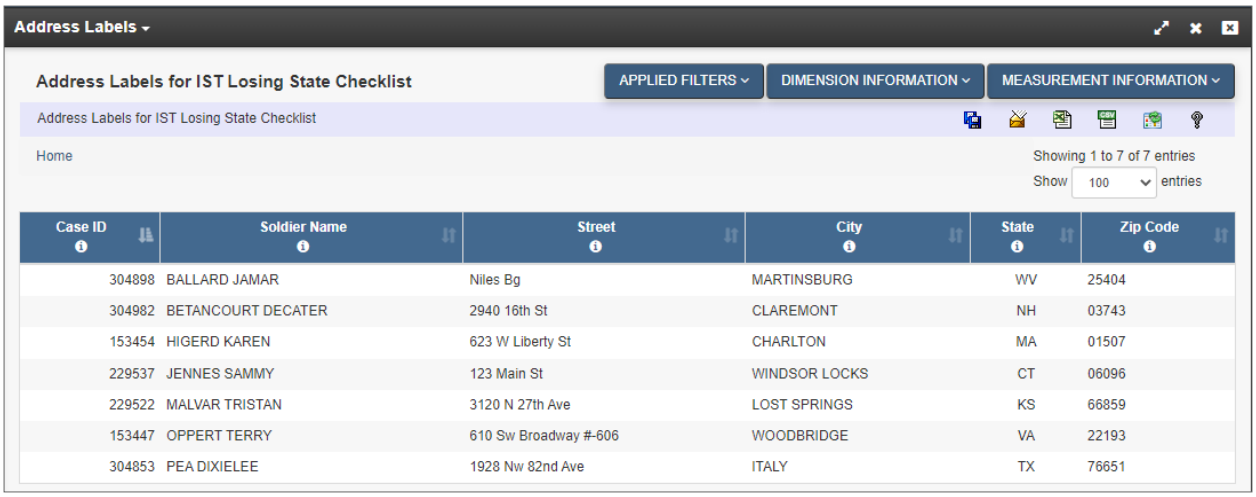
This report displays the numbers of extensions made by year and by state.



1 Year	1 Year %	2 Years	2 Years %	3 Years	3 Years %	4 Years	4 Years %	5 Years	5 Years %	6 Years	6 Years %	Other	Other %
No Data Found.													

13.3.15 Address Labels

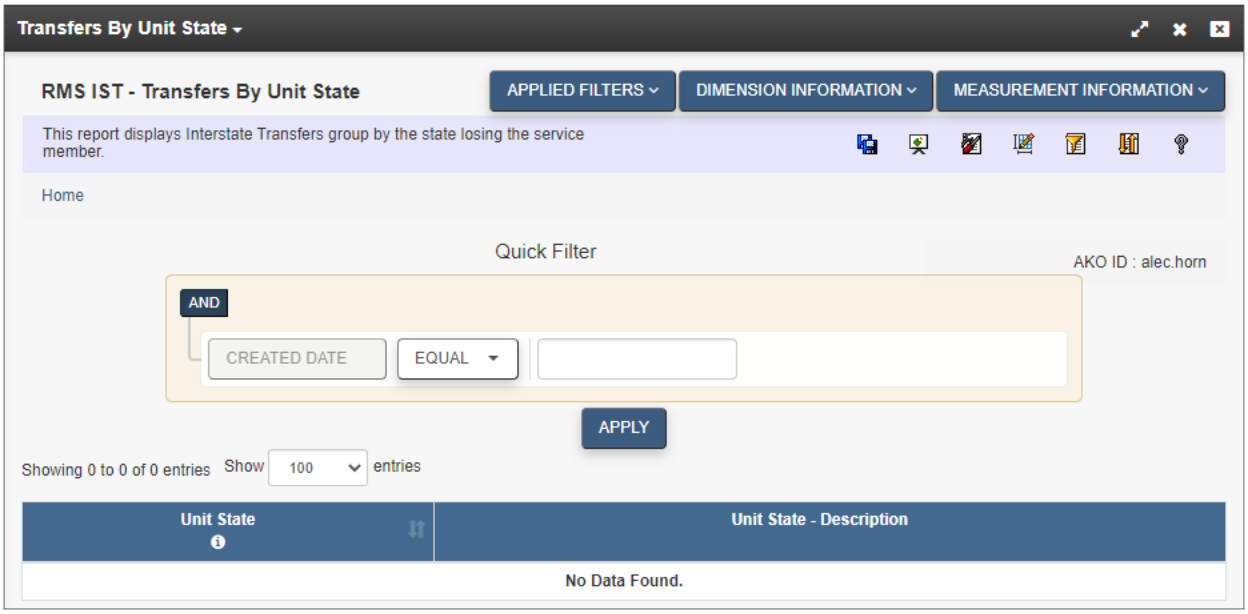
This report displays the contact information needed for address labels for cases in the Complete Losing State Checklist work bucket in the Interstate Transfer folder.



Case ID	Soldier Name	Street	City	State	Zip Code
304898	BALLARD JAMAR	Niles Bg	MARTINSBURG	WV	25404
304982	BETANCOURT DECATER	2940 16th St	CLAREMONT	NH	03743
153454	HIGERD KAREN	623 W Liberty St	CHARLTON	MA	01507
229537	JENNES SAMMY	123 Main St	WINDSOR LOCKS	CT	06096
229522	MALVAR TRISTAN	3120 N 27th Ave	LOST SPRINGS	KS	66859
153447	OPPERT TERRY	610 Sw Broadway #-606	WOODBRIDGE	VA	22193
304853	PEA DIXIELEE	1928 Nw 82nd Ave	ITALY	TX	76651

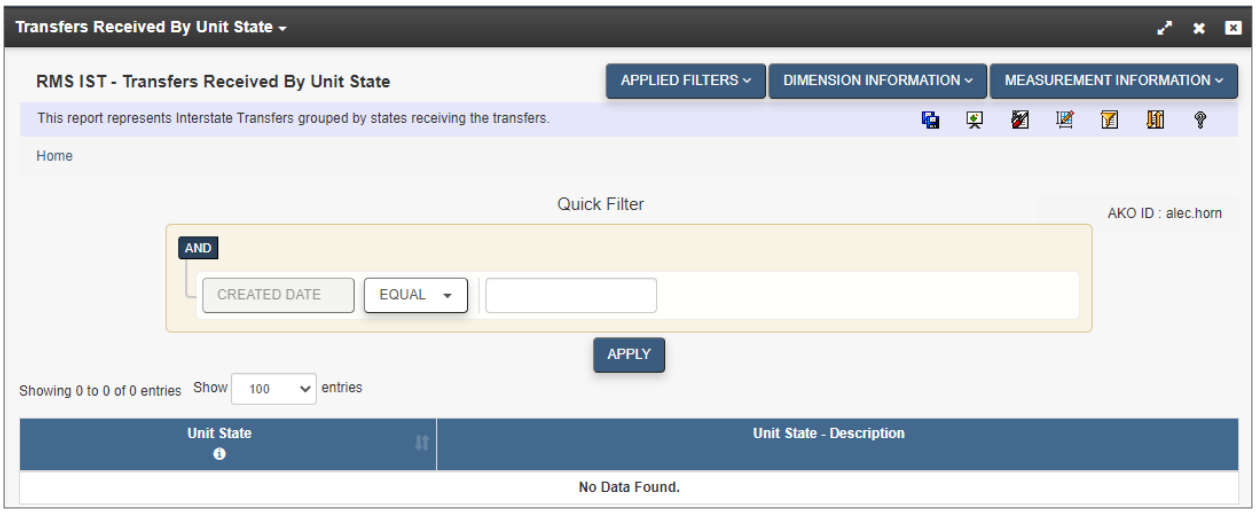
13.3.16 Transfers by Unit State

This report displays the number of Interstate Transfers grouped by the state losing the service member. Each status has an accompanying percentage column, showing the user what percentage of that state's cases are in that status.



13.3.17 Transfers Received by Unit State

This report represents the number of Interstate Transfers grouped by the state receiving the service member. Each status has an accompanying percentage column, showing the user what percentage of that state's cases are in that status.



13.3.18 Days in work bucket by case

Days in Work Bucket by Case

Days in work bucket by case

APPLIED FILTERS | DIMENSION INFORMATION | MEASUREMENT INFORMATION

Home

Showing 1 to 52 of 52 entries

Previous 1 Next

Unit State	Unit State - Description	Case Count
AK	Alaska	6
AL	Alabama	10
AR	Arkansas	7
AZ	Arizona	13
CA	California	17
CO	Colorado	14
CT	Connecticut	22
DE	Delaware	2
FL	Florida	26
GA	Georgia	13
HI	Hawaii	2
IA	Iowa	7
ID	Idaho	4
IL	Illinois	2
IN	Indiana	6
KS	Kansas	10
KY	Kentucky	7
LA	Louisiana	12
MA	Massachusetts	65
MD	Maryland	17
ME	Maine	550
MI	Michigan	11

13.3.19 Soldier Ship Roster

This report provides the number of Soldiers in each state who have upcoming ship dates within 1-30 days, 31-60 days, 61-90 days, and the total (within 1-90 days).

Soldier Ship Roster

Soldier Ship Roster

APPLIED FILTERS | DIMENSION INFORMATION | MEASUREMENT INFORMATION

The Soldier Ship Roster report provides the number of soldiers within each group before shipment.

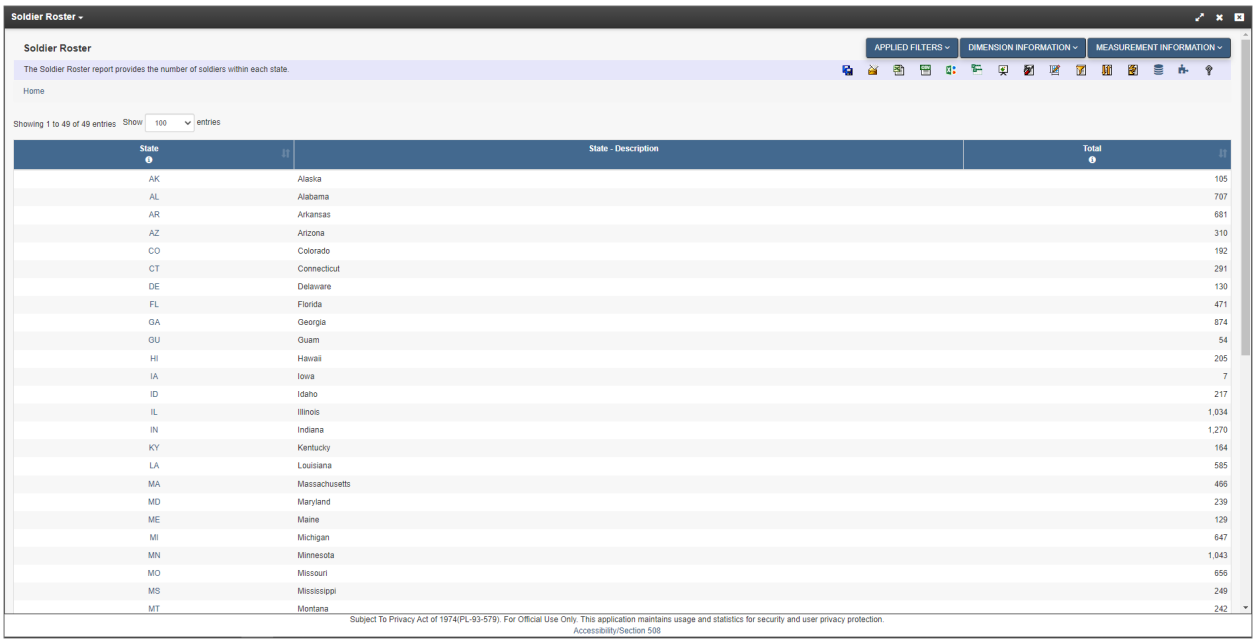
Home

Showing 0 to 0 of 0 entries Show 100 entries

State	State - Description	1 - 30 Days	31 - 60 Days	61 - 90 Days	Total
No Data Found.					
	Total	0	0	0	0

13.3.20 Soldier Roster

This report provides the number of Soldiers within each state.



Soldier Roster

APPLIED FILTERS | DIMENSION INFORMATION | MEASUREMENT INFORMATION

The Soldier Roster report provides the number of soldiers within each state.

Home

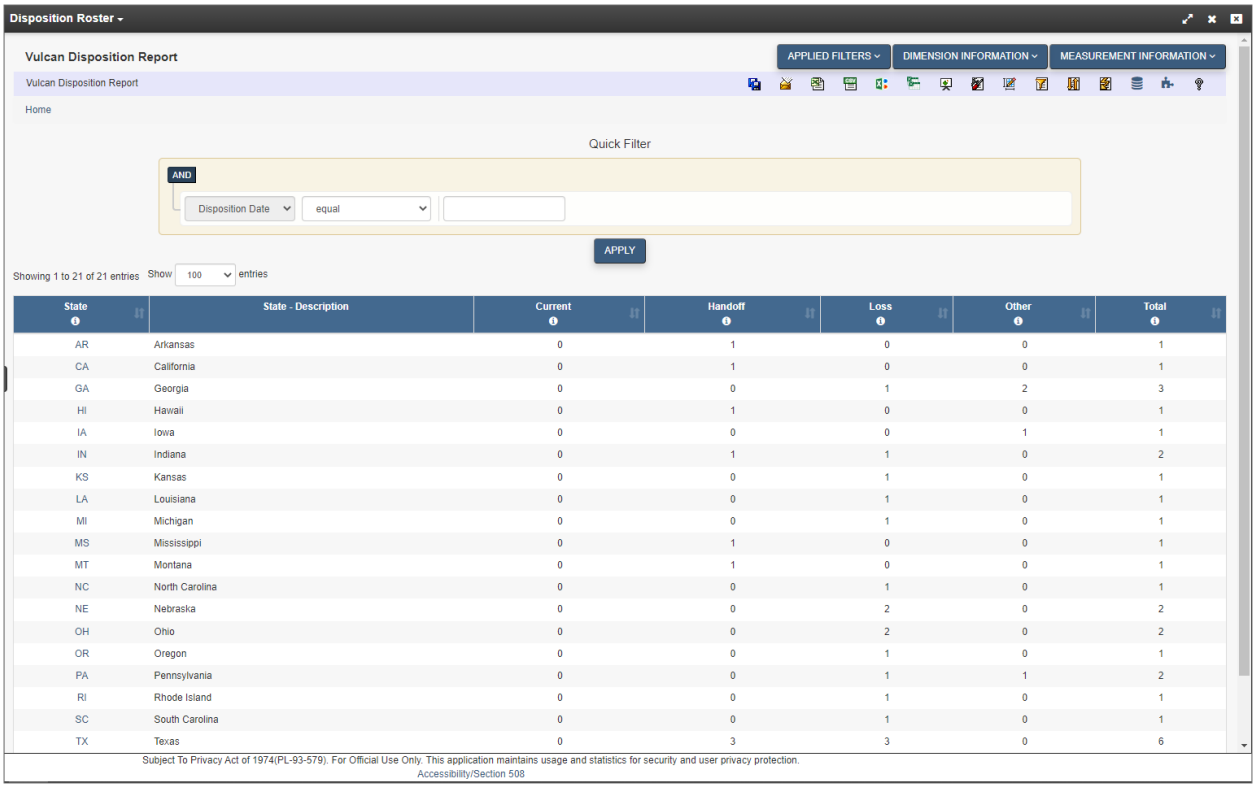
Showing 1 to 49 of 49 entries Show 100 entries

State	State - Description	Total
AK	Alaska	105
AL	Alabama	707
AR	Arkansas	681
AZ	Arizona	310
CO	Colorado	192
CT	Connecticut	291
DE	Delaware	130
FL	Florida	471
GA	Georgia	874
GU	Guam	54
HI	Hawaii	205
IA	Iowa	7
ID	Idaho	217
IL	Illinois	1,034
IN	Indiana	1,270
KY	Kentucky	164
LA	Louisiana	585
MA	Massachusetts	466
MD	Maryland	239
ME	Maine	129
MI	Michigan	647
MN	Minnesota	1,043
MO	Missouri	656
MS	Mississippi	249
MT	Montana	242

Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.
Accessibility/Section 508

13.3.21 Disposition Roster

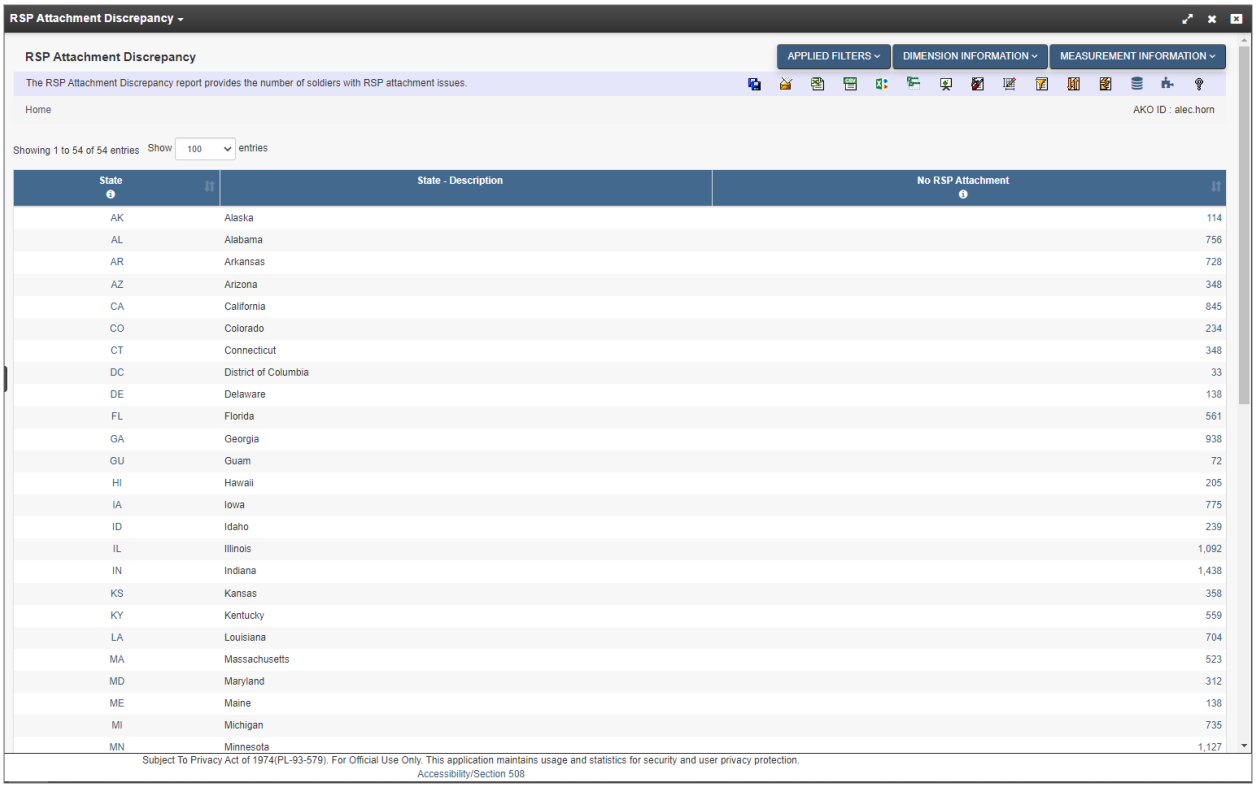
This report allows users to filter Soldiers by Disposition Date or Warrior Disposition ID.



State	State - Description	Current	Handoff	Loss	Other	Total
AR	Arkansas	0	1	0	0	1
CA	California	0	1	0	0	1
GA	Georgia	0	0	1	2	3
HI	Hawaii	0	1	0	0	1
IA	Iowa	0	0	0	1	1
IN	Indiana	0	1	1	0	2
KS	Kansas	0	0	1	0	1
LA	Louisiana	0	0	1	0	1
MI	Michigan	0	0	1	0	1
MS	Mississippi	0	1	0	0	1
MT	Montana	0	1	0	0	1
NC	North Carolina	0	0	1	0	1
NE	Nebraska	0	0	2	0	2
OH	Ohio	0	0	2	0	2
OR	Oregon	0	0	1	0	1
PA	Pennsylvania	0	0	1	1	2
RI	Rhode Island	0	0	1	0	1
SC	South Carolina	0	0	1	0	1
TX	Texas	0	3	3	0	6

13.3.22 RSP Attachment Discrepancy

This report displays the number of Soldiers with no RSP attachment or an invalid RSP attachment, generated by discrepancies between the Soldier's Attachment UPC and IPPS-A data. A discrepancy indicates either there is an error in the Soldier's records or a unit needs to be designated as an RSP Site. (See **RSP Site Setup** on page 261 for information about adding RSP Sites.)



RSP Attachment Discrepancy

RSP Attachment Discrepancy

APPLIED FILTERS | DIMENSION INFORMATION | MEASUREMENT INFORMATION

The RSP Attachment Discrepancy report provides the number of soldiers with RSP attachment issues.

Home

AKO ID : alec.horn

Showing 1 to 54 of 54 entries Show 100 entries

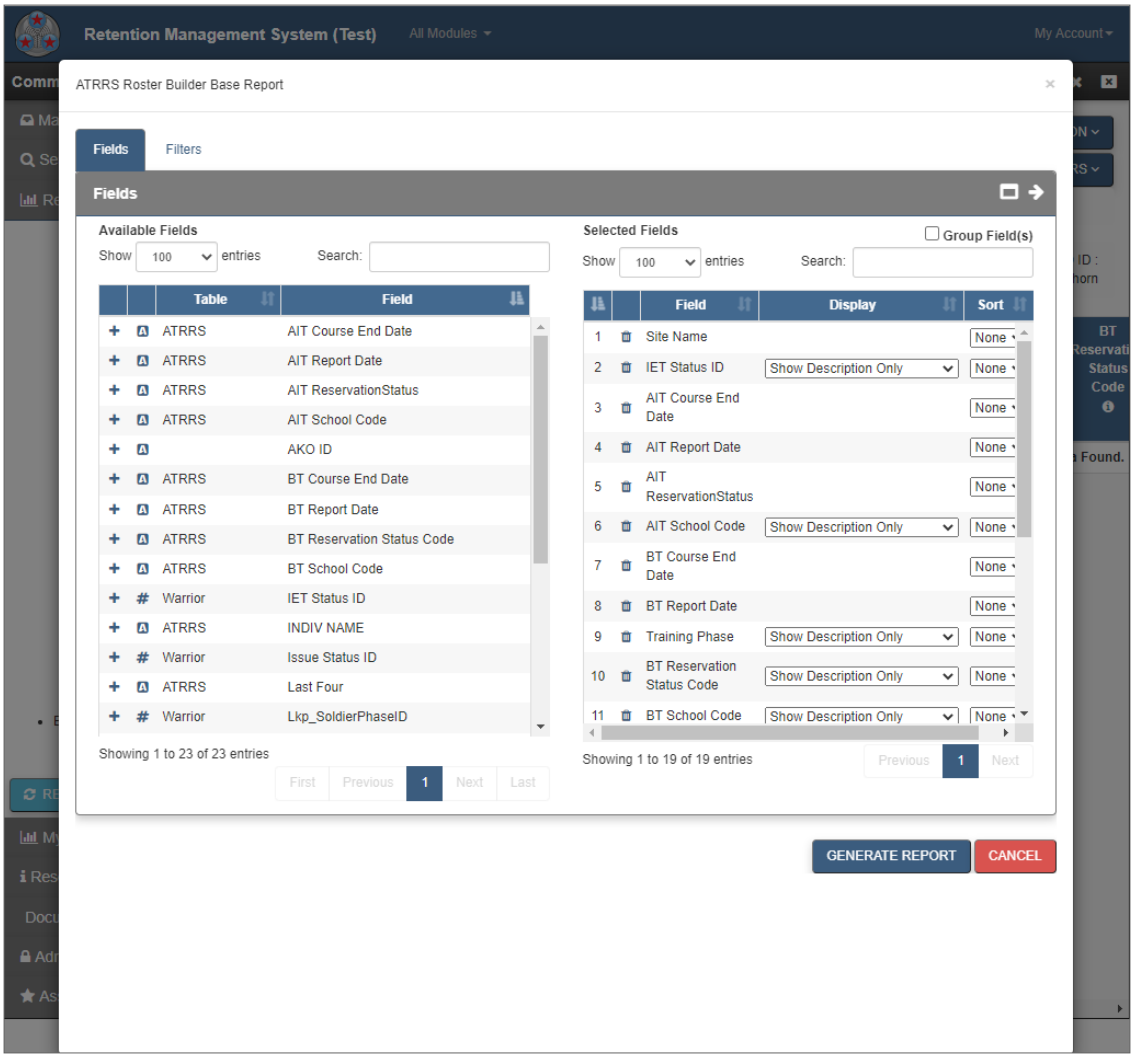
State	State - Description	No RSP Attachment
AK	Alaska	114
AL	Alabama	756
AR	Arkansas	728
AZ	Arizona	348
CA	California	845
CO	Colorado	234
CT	Connecticut	348
DC	District of Columbia	33
DE	Delaware	138
FL	Florida	561
GA	Georgia	938
GU	Guam	72
HI	Hawaii	205
IA	Iowa	775
ID	Idaho	239
IL	Illinois	1,092
IN	Indiana	1,438
KS	Kansas	358
KY	Kentucky	559
LA	Louisiana	704
MA	Massachusetts	523
MD	Maryland	312
ME	Maine	138
MI	Michigan	735
MN	Minnesota	1,127

Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.

Accessibility/Section 508

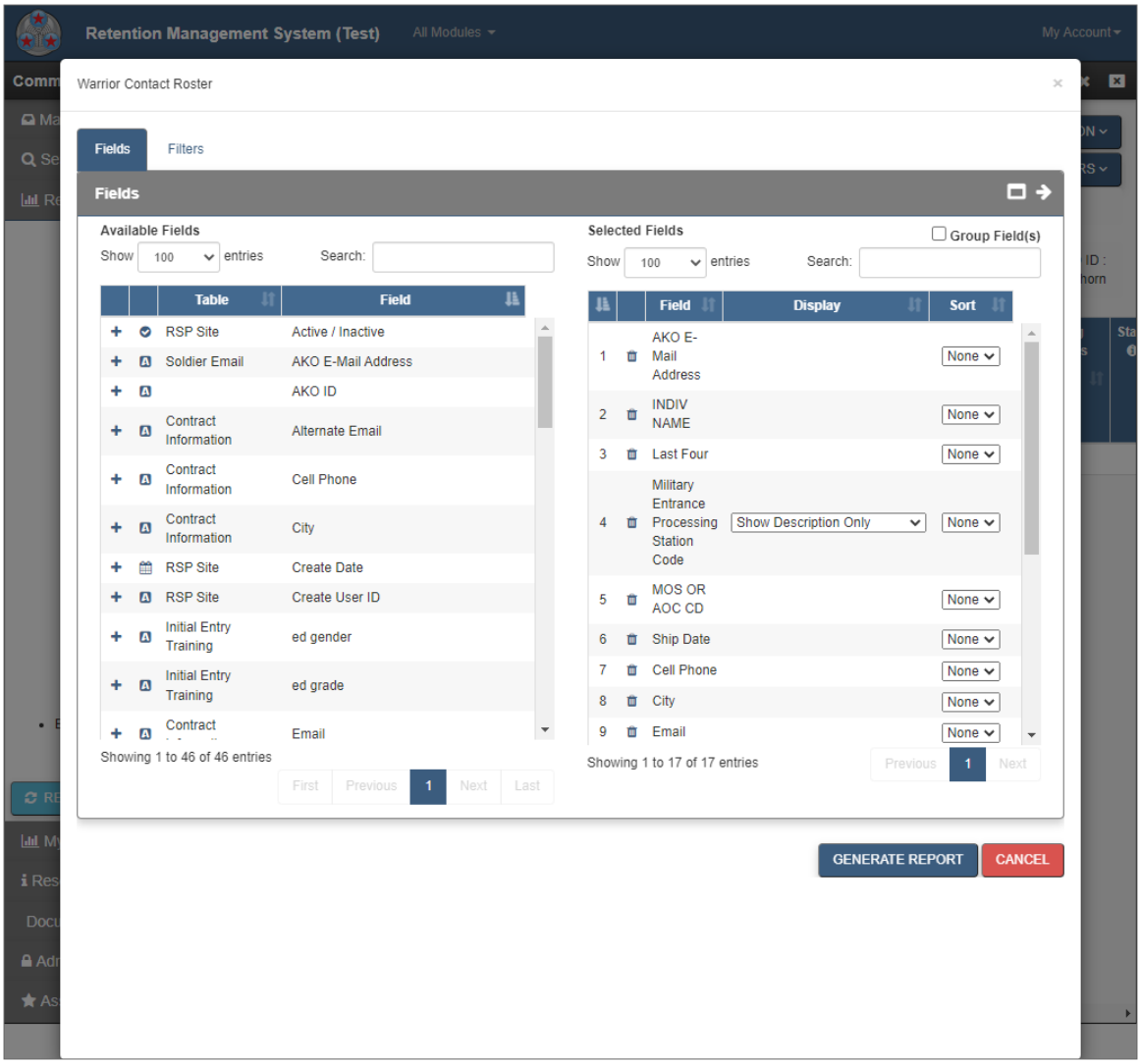
13.3.23 ATTRS Training Roster

This report allows the user to build customized reports with data from the Army Training Requirements and Resources System.



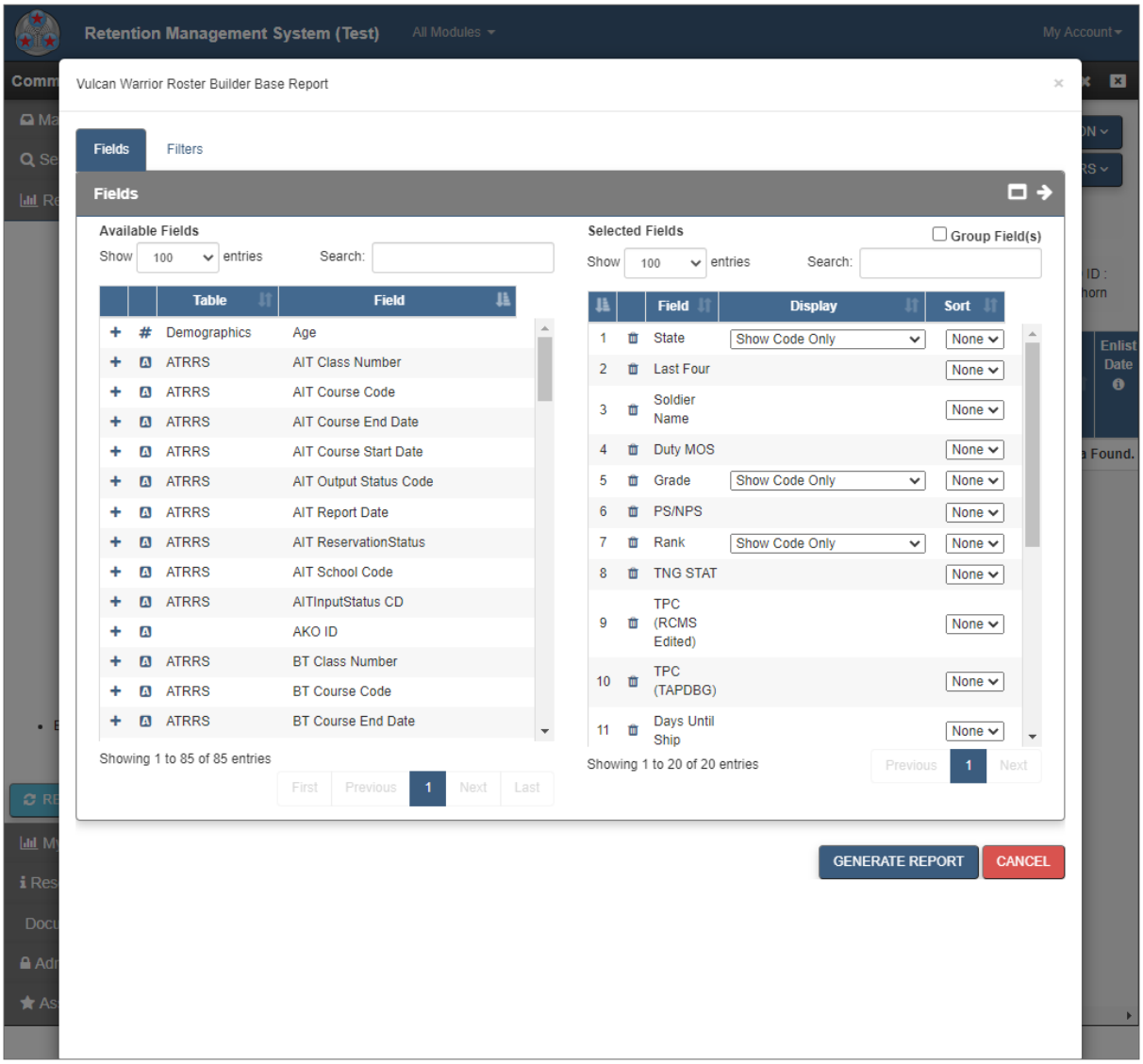
13.3.24 Warrior Contact Roster

This report allows the user to build customized reports by entering contact information.



13.3.25 Warrior Roster Builder

Vulcan Warrior Roster Builder allows user to build customized reports.

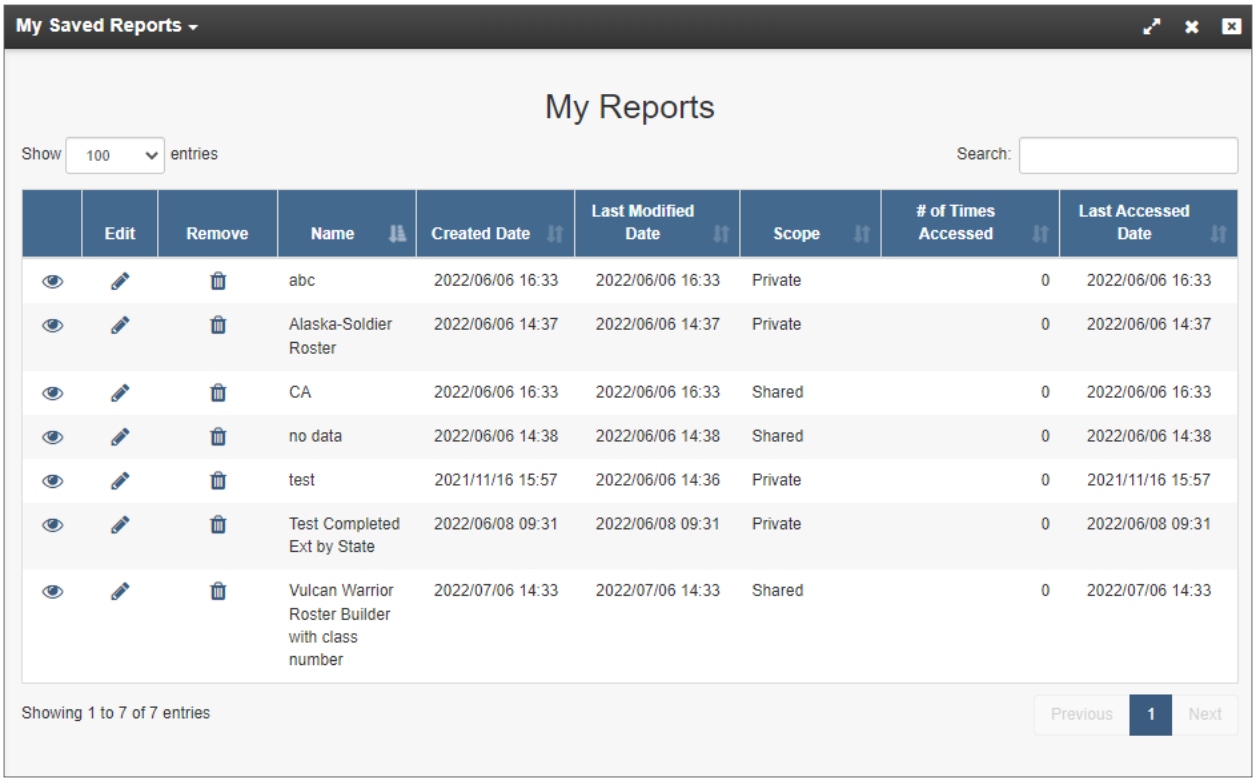


13.4 My Reports

This blade stores reports specific to the user and contains the *My Reports*, *Private*, and *Shared* reports folders.

13.4.1 My Reports Folder

This folder stores reports associated with the user in the *My Reports* grid.

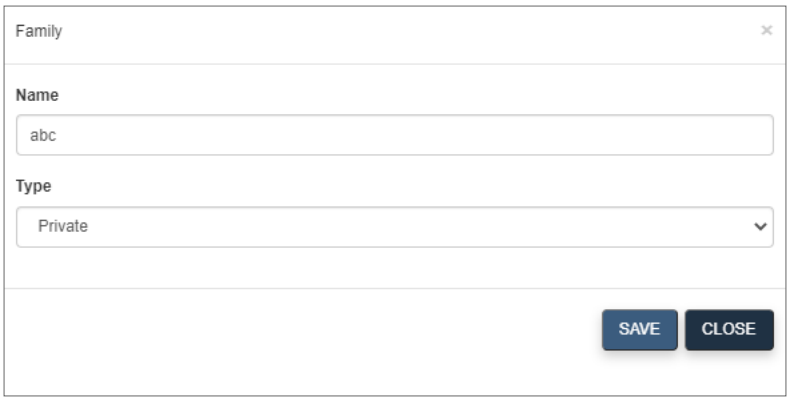


	Edit	Remove	Name	Created Date	Last Modified Date	Scope	# of Times Accessed	Last Accessed Date
			abc	2022/06/06 16:33	2022/06/06 16:33	Private	0	2022/06/06 16:33
			Alaska-Soldier Roster	2022/06/06 14:37	2022/06/06 14:37	Private	0	2022/06/06 14:37
			CA	2022/06/06 16:33	2022/06/06 16:33	Shared	0	2022/06/06 16:33
			no data	2022/06/06 14:38	2022/06/06 14:38	Shared	0	2022/06/06 14:38
			test	2021/11/16 15:57	2022/06/06 14:36	Private	0	2021/11/16 15:57
			Test Completed Ext by State	2022/06/08 09:31	2022/06/08 09:31	Private	0	2022/06/08 09:31
			Vulcan Warrior Roster Builder with class number	2022/07/06 14:33	2022/07/06 14:33	Shared	0	2022/07/06 14:33

Click the **View** icon to open the saved report.

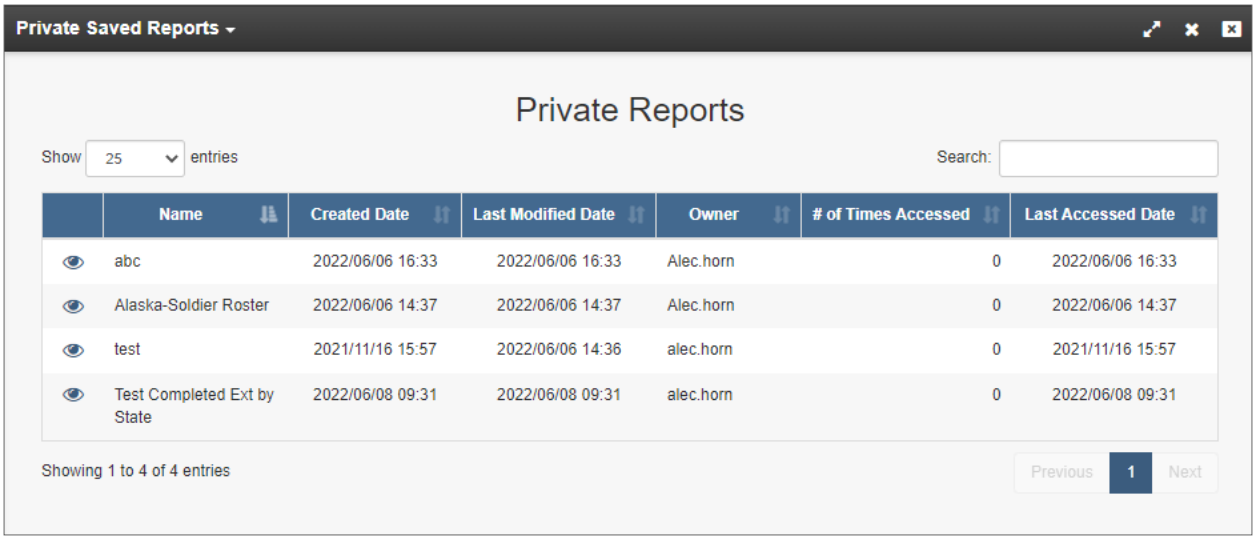
Click the **Delete** icon to remove the report from the *My Reports* folder.

Click the **Edit** icon to open the *Edit Report Details* window and change the report name and type.



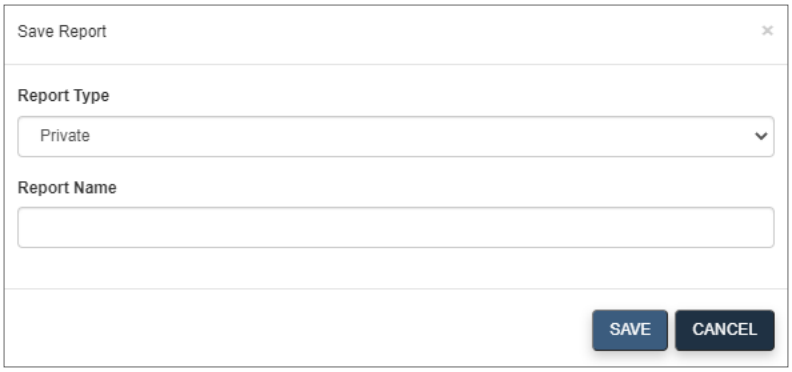
13.4.2 Private Reports

This folder contains private reports saved by the user. Reports saved to this folder are displayed in the *Private Reports* grid.

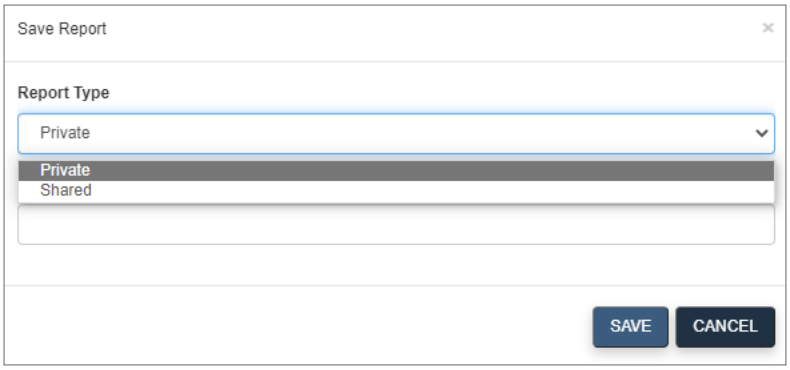


To save a report to this folder:

1. Open a report from the *Reports* blade.
2. Click the **Save** icon from among the report tools.
3. The *Save Report* window opens.



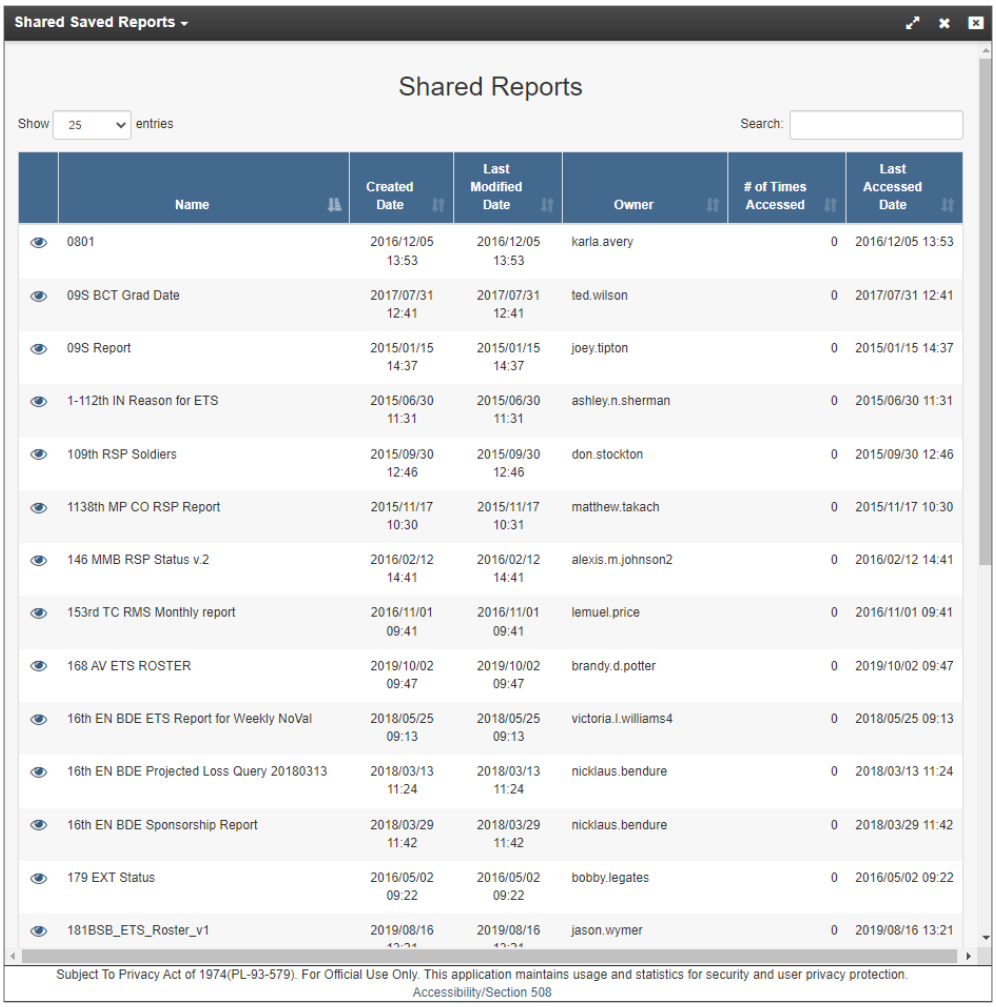
4. Choose the **Private** report type from the drop-down and give the report a name.



5. Click **SAVE**.
   - The report is saved to the *Private Reports* folder.

13.4.3 Shared Reports

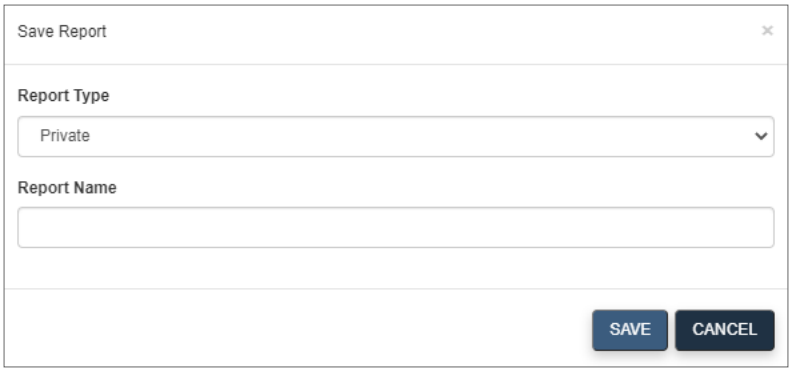
This folder contains shared reports saved by the user. Reports saved to this folder are displayed in the *Shared Reports* grid.



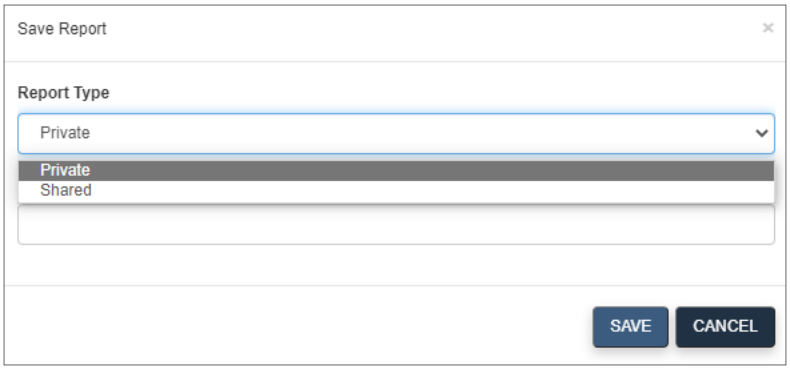
Name	Created Date	Last Modified Date	Owner	# of Times Accessed	Last Accessed Date
0801	2016/12/05 13:53	2016/12/05 13:53	karla.avery	0	2016/12/05 13:53
09S BCT Grad Date	2017/07/31 12:41	2017/07/31 12:41	ted.wilson	0	2017/07/31 12:41
09S Report	2015/01/15 14:37	2015/01/15 14:37	joey.tipton	0	2015/01/15 14:37
1-112th IN Reason for ETS	2015/06/30 11:31	2015/06/30 11:31	ashley.n.sherman	0	2015/06/30 11:31
109th RSP Soldiers	2015/09/30 12:46	2015/09/30 12:46	don.stockton	0	2015/09/30 12:46
1138th MP CO RSP Report	2015/11/17 10:30	2015/11/17 10:31	matthew.takach	0	2015/11/17 10:30
146 MMB RSP Status v.2	2016/02/12 14:41	2016/02/12 14:41	alexis.m.johnson2	0	2016/02/12 14:41
153rd TC RMS Monthly report	2016/11/01 09:41	2016/11/01 09:41	lemuel.price	0	2016/11/01 09:41
168 AV ETS ROSTER	2019/10/02 09:47	2019/10/02 09:47	brandy.d.potter	0	2019/10/02 09:47
16th EN BDE ETS Report for Weekly NoVal	2018/05/25 09:13	2018/05/25 09:13	victoria.l.williams4	0	2018/05/25 09:13
16th EN BDE Projected Loss Query 20180313	2018/03/13 11:24	2018/03/13 11:24	nicklaus.bendure	0	2018/03/13 11:24
16th EN BDE Sponsorship Report	2018/03/29 11:42	2018/03/29 11:42	nicklaus.bendure	0	2018/03/29 11:42
179 EXT Status	2016/05/02 09:22	2016/05/02 09:22	bobby.legates	0	2016/05/02 09:22
181BSB_ETS_Roster_v1	2019/08/16	2019/08/16	jason.wymer	0	2019/08/16 13:21

To save a report to this folder:

1. Open a report from the *Reports* blade.
2. Click the **Save** icon from among the report tools.
3. The *Save Report* window opens.



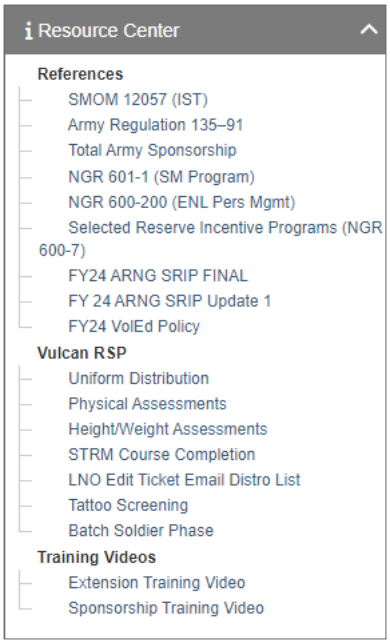
4. Choose the **Shared** report type from the drop-down and give the report a name.



5. Click **SAVE**.
   - The report is saved to the *Shared Reports* folder.

13.5 Resource Center

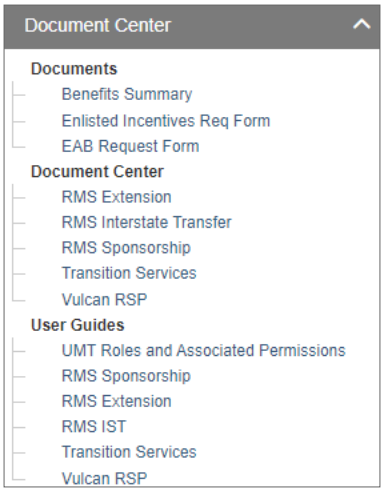
The *Resource Center* blade includes reference documents, user guides, and training videos for the application.



Clicking a link opens the item in a new window.

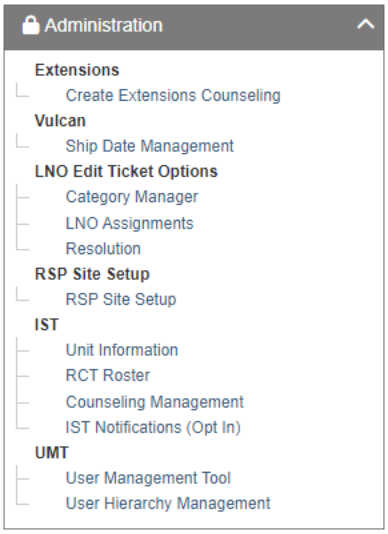
13.6 Document Center

The *Document Center* blade contains user guides and other module specific documentation.



13.7 Administration

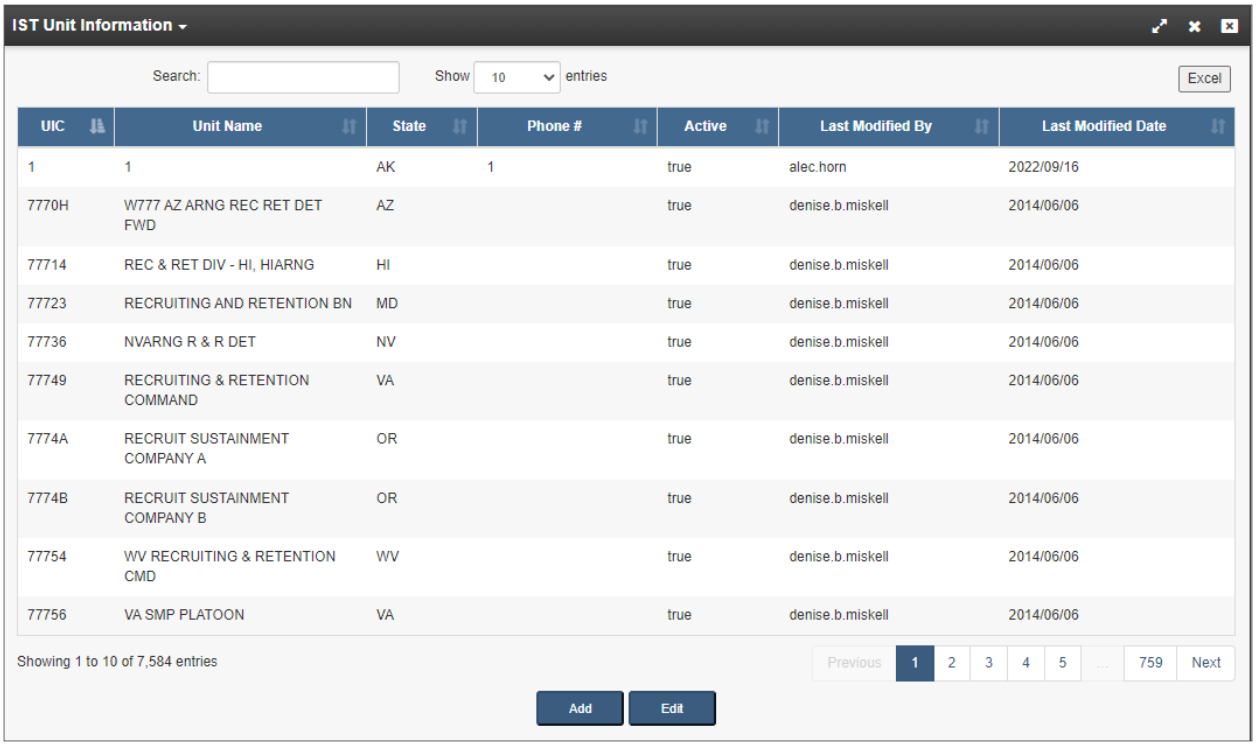
The *Administration* tab contains tools used for administrative action. Open the *Administration* tab in the Command Center to view the tools available to you.



13.7.1 IST Unit Information

Development Note - This section is still under development.

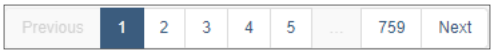
1. Click **Unit Information** in the *Administration* blade.
2. *IST Unit Information* opens in Panel 2. *Unit Information* displays information about units that may need to be contacted for IST cases.



UIC	Unit Name	State	Phone #	Active	Last Modified By	Last Modified Date
1	1	AK	1	true	alec.horn	2022/09/16
7770H	W777 AZ ARNG REC RET DET FWD	AZ		true	denise.b.miskell	2014/06/06
77714	REC & RET DIV - HI, HIARNG	HI		true	denise.b.miskell	2014/06/06
77723	RECRUITING AND RETENTION BN	MD		true	denise.b.miskell	2014/06/06
77736	NVARNG R & R DET	NV		true	denise.b.miskell	2014/06/06
77749	RECRUITING & RETENTION COMMAND	VA		true	denise.b.miskell	2014/06/06
7774A	RECRUIT SUSTAINMENT COMPANY A	OR		true	denise.b.miskell	2014/06/06
7774B	RECRUIT SUSTAINMENT COMPANY B	OR		true	denise.b.miskell	2014/06/06
77754	WV RECRUITING & RETENTION CMD	WV		true	denise.b.miskell	2014/06/06
77756	VA SMP PLATOON	VA		true	denise.b.miskell	2014/06/06

Navigation

1. Navigate to other pages in the report using the *Previous*, *Next*, and number buttons beneath the report table.



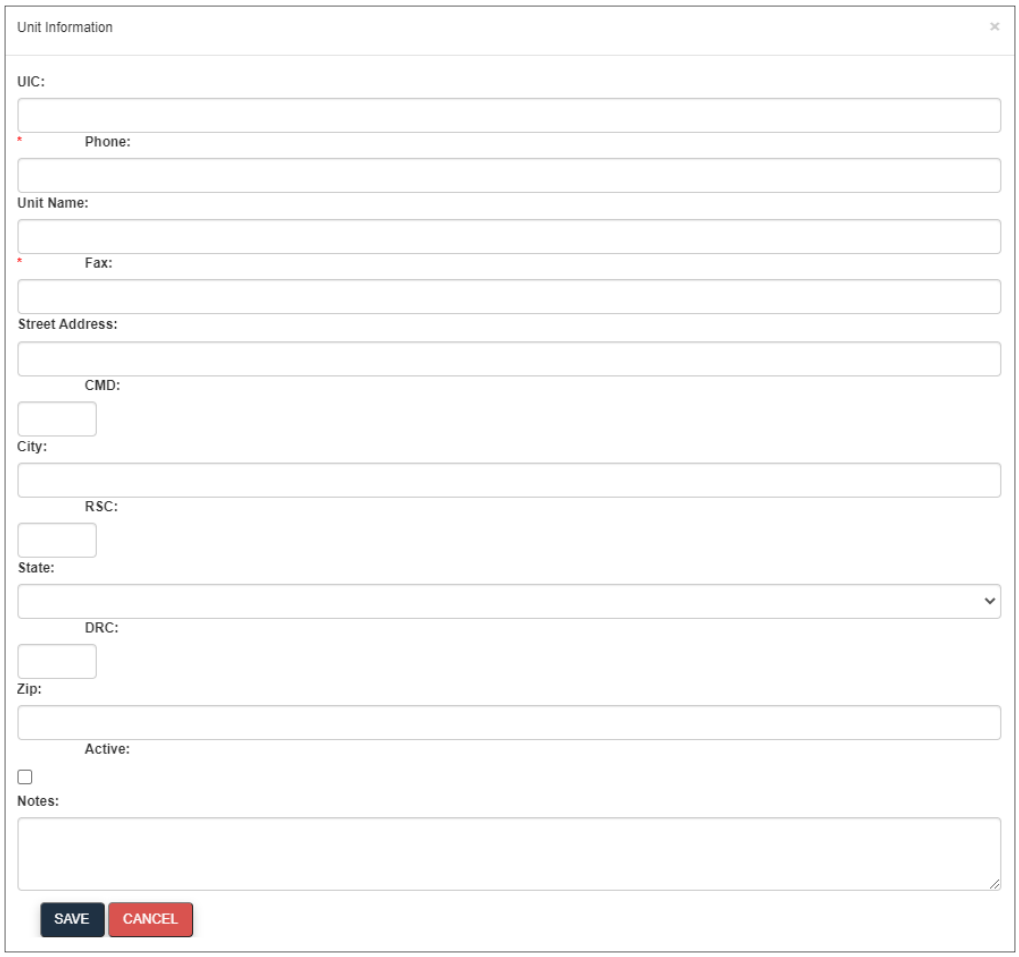
2. You can also search for specific information using the *Search* bar at the top of the screen. The results update automatically as you type.

Filtering the Report

1. Filter the report by clicking within the column filter fields.

Add a Unit

1. Click **Add** below the table.
   - The *Unit Information* window opens.



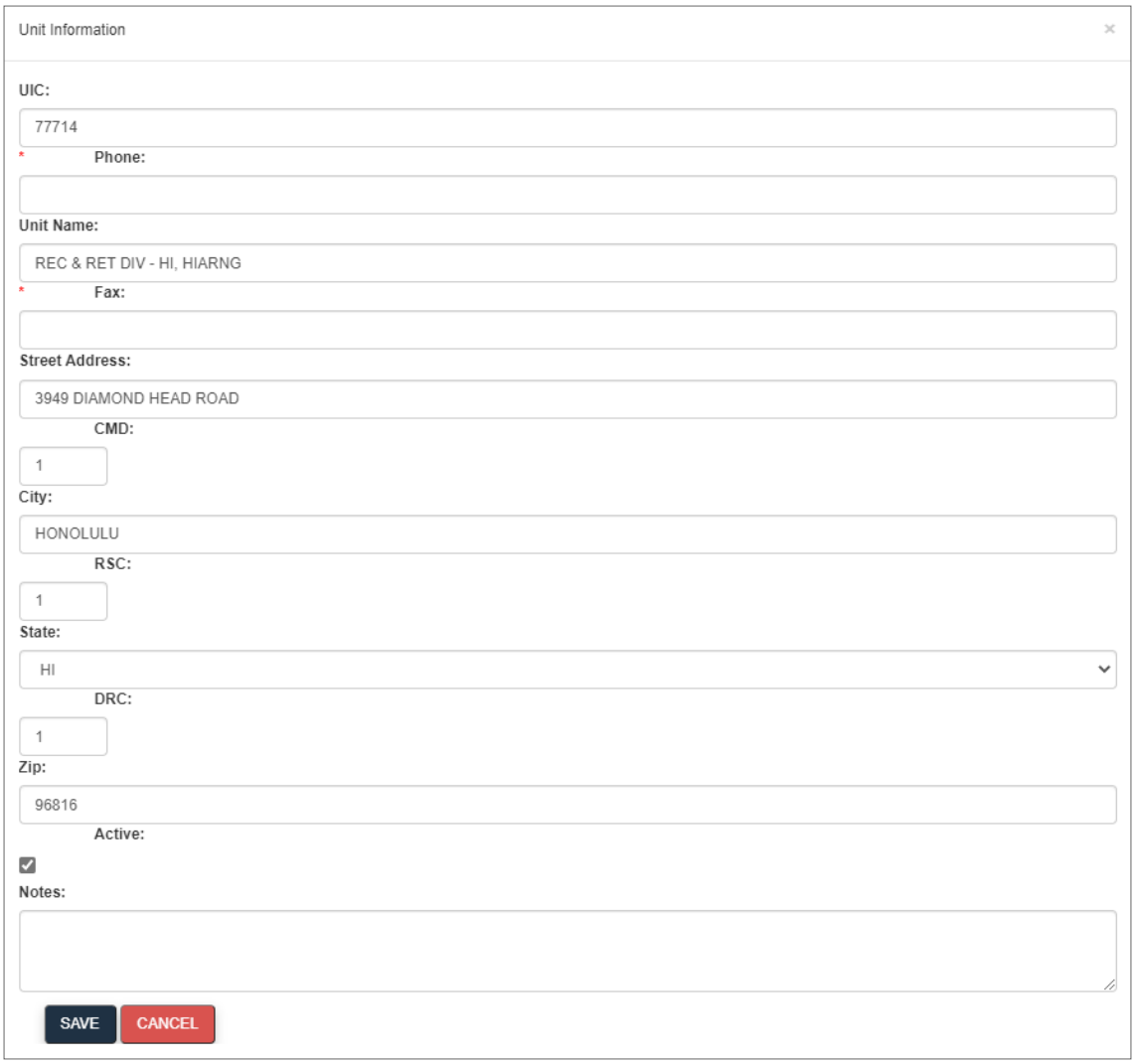
2. Enter information into the fields as needed.
3. Click **SAVE**.
   - The unit is added.

Edit Unit Information

1. Click the row of the unit to edit.
   - The selected row is highlighted blue.

UIC	Unit Name	State	Phone #	Active	Last Modified By	Last Modified Date
1	1	AK	1	true	alec.horn	2022/09/16
7770H	W777 AZ ARNG REC RET DET FWD	AZ		true	denise.b.miskell	2014/06/06
77714	REC & RET DIV - HI, HIARNG	HI		true	denise.b.miskell	2014/06/06
77723	RECRUITING AND RETENTION BN	MD		true	denise.b.miskell	2014/06/06

2. Click **Edit** below the report.
3. The *Unit Information* window opens. Edit the information as needed.



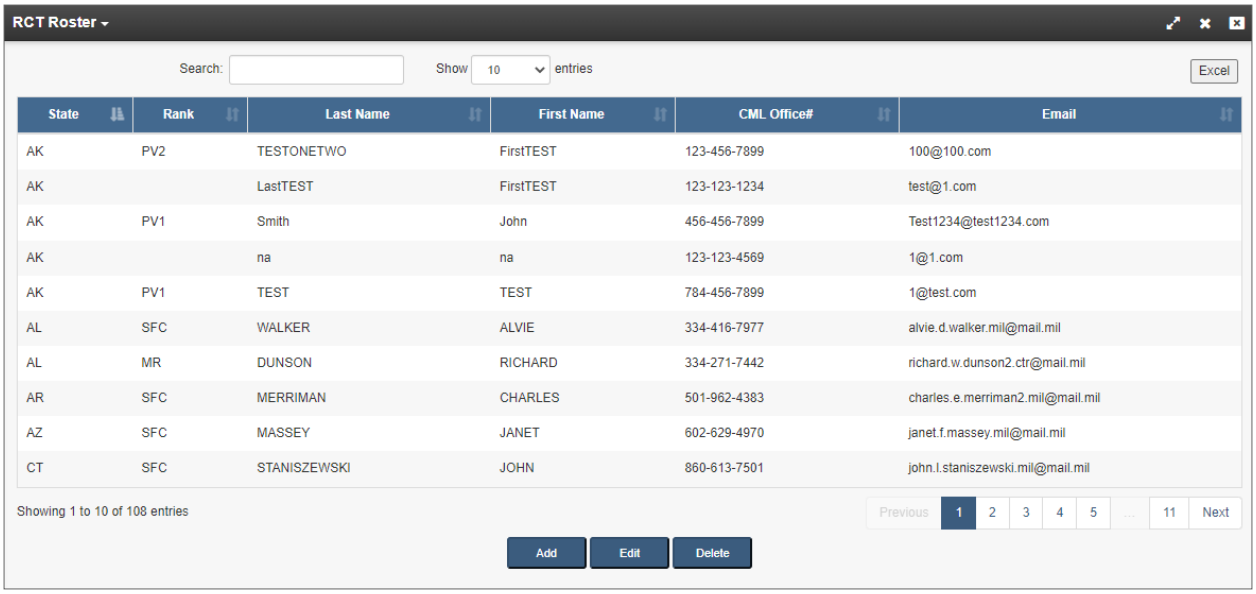
4. Click **SAVE**.
   - Your edits are saved.

13.7.2 RCT Roster

Development Note - This section is still under development

The RCT Roster provides a way for IST Admin users to maintain unit contact information. It displays the IST points of contact for each of the 54 states and territories in a table format.

1. Click **RCT Roster** within the *Administration* tab.
2. The *RCT Roster* opens in the second panel.



State	Rank	Last Name	First Name	CML Office#	Email
AK	PV2	TESTONETWO	FirstTEST	123-456-7899	100@100.com
AK		LastTEST	FirstTEST	123-123-1234	test@1.com
AK	PV1	Smith	John	456-456-7899	Test1234@test1234.com
AK		na	na	123-123-4569	1@1.com
AK	PV1	TEST	TEST	784-456-7899	1@test.com
AL	SFC	WALKER	ALVIE	334-416-7977	alvie.d.walker.mil@mail.mil
AL	MR	DUNSON	RICHARD	334-271-7442	richard.w.dunson2.ctr@mail.mil
AR	SFC	MERRIMAN	CHARLES	501-962-4383	charles.e.merriman2.mil@mail.mil
AZ	SFC	MASSEY	JANET	602-629-4970	janet.f.massey.mil@mail.mil
CT	SFC	STANISZEWSKI	JOHN	860-613-7501	john.l.staniszewski.mil@mail.mil

Navigation

1. Navigate to other pages in the roster using the *Previous Page* and *Next Page* icons below the roster.
2. You can also search for a specific case using the *Search* field at the top of the screen.

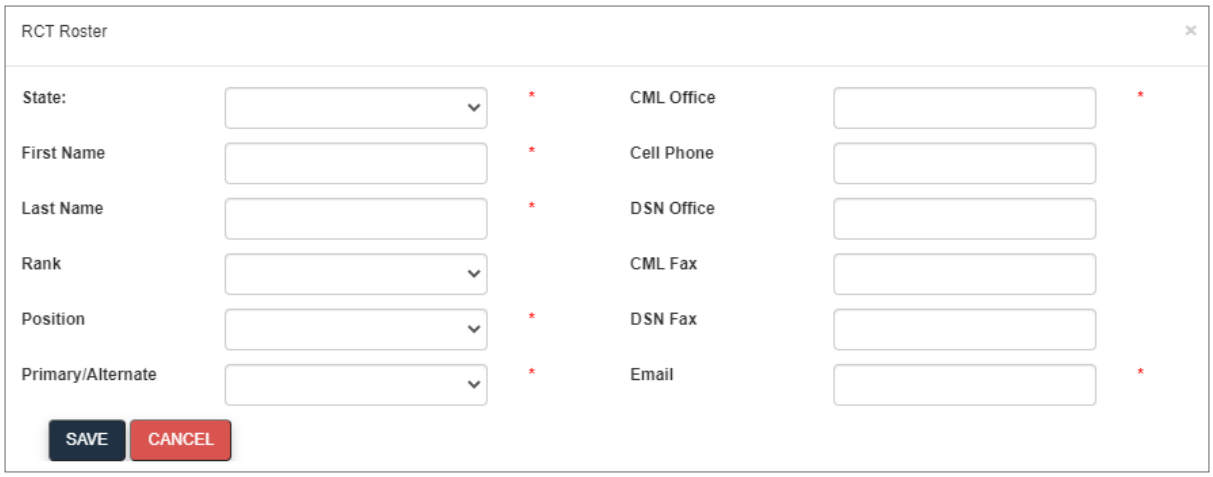
More Options

1. To export to Excel, click **Excel** at the top right of the screen.

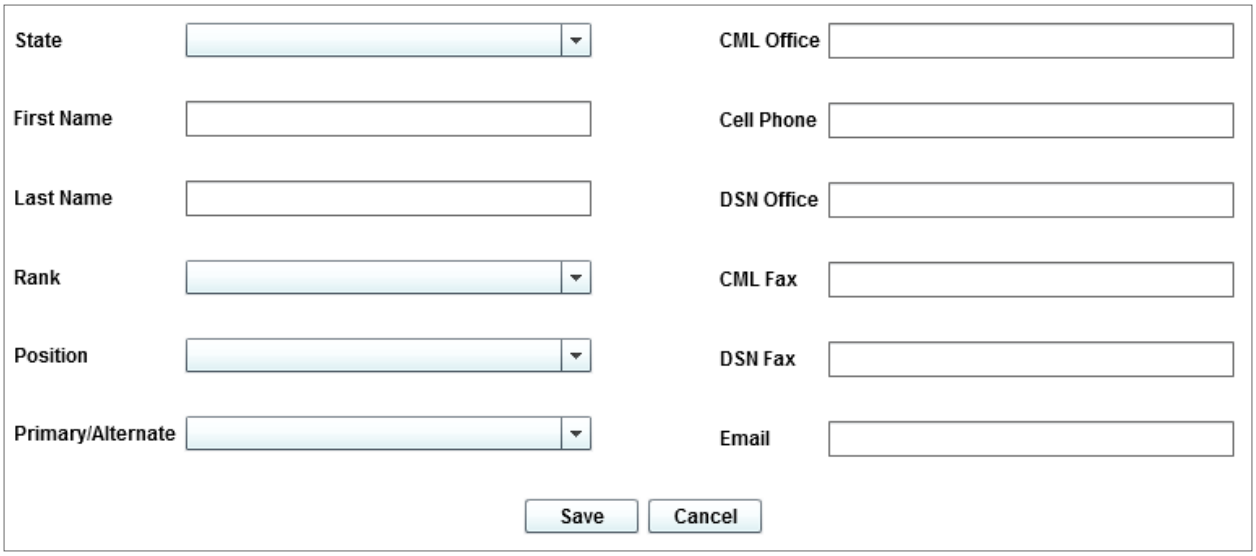
2. The roster is downloaded as an excel file.

Add an IST contact

1. Click **Add** below the roster.
   - The *RCT Roster* window opens.



2. Select options from the drop-down menus and enter information into the fields as needed. Fields marked with a red asterisk are required fields.



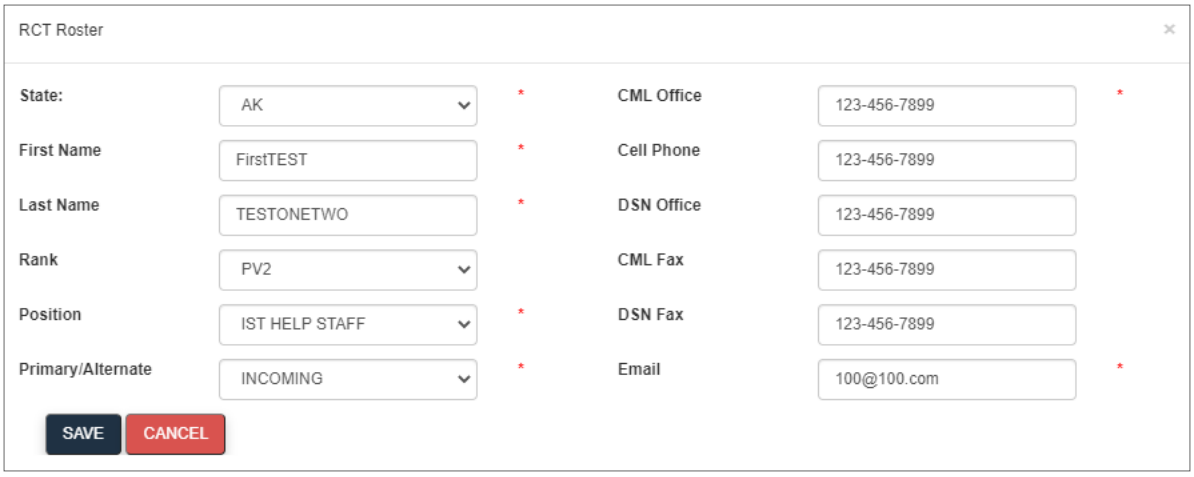
3. Click **SAVE**.
   - The contact is added.

Edit an IST contact

1. Click the row of the contact to edit.
   - The selected row is highlighted blue.

State	Rank	Last Name	First Name	CML Office#	Email
AK	PV2	TESTONETWO	FirstTEST	123-456-7899	100@100.com
AK		LastTEST	FirstTEST	123-123-1234	test@1.com

2. Click **Edit** below the roster.
   - The *RCT Roster* window opens.
3. Edit the options from the drop-down menus and information in the fields as needed.



4. Click **SAVE**.
   - Your edits are saved.

Delete an IST contact

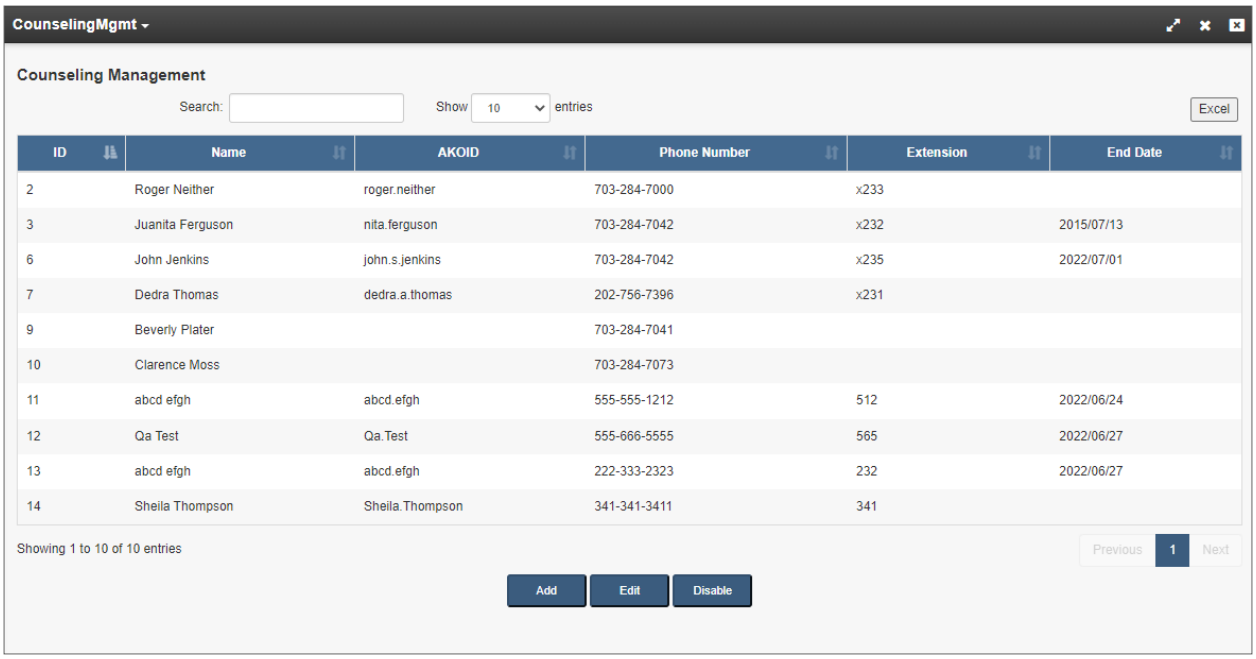
1. Click the row of the contact to delete.
   - The selected row is highlighted blue.

State	Rank	Last Name	First Name	CML Office#	Email
AK	PV2	TESTONETWO	FirstTEST	123-456-7899	100@100.com
AK		LastTEST	FirstTEST	123-123-1234	test@1.com

2. Click **Delete** below the roster.
   - The contact is deleted.

13.7.3 Counseling Management

1. Click **Counseling Management** within the *Administration* tab.
2. The *Counseling Management* screen opens in the second panel.



Navigation

1. Navigate to other pages in the roster using the *Previous Page* and *Next Page* icons below the roster.
2. You can also search for a specific case using the *Search* field at the top of the screen.

More Options

1. To export to Excel, click **Excel** at the top right of the screen.

2. The roster is downloaded as an excel file.

Add an LNO User

1. Click **Add** below the roster.
   - The *LNO User* window opens.

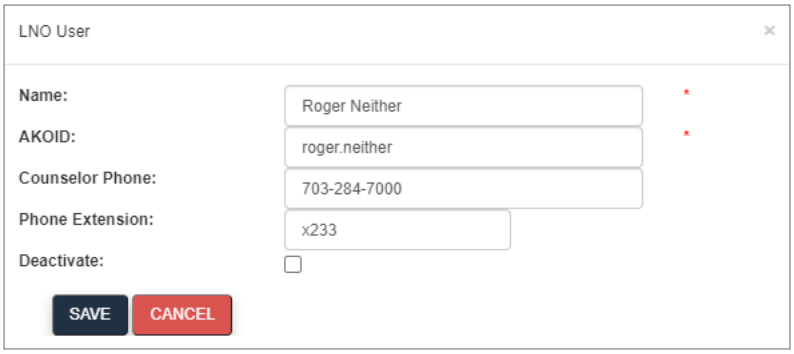
2. Fill in the appropriate information in the fields. Fields marked with a red asterisk are required fields.
3. Click **SAVE**.
   - The user is added.

Edit an LNO User

1. Click the row of the user you want to edit.
   - The selected row is highlighted blue.

ID	Name	AKOID	Phone Number	Extension	End Date
2	Roger Neither	roger.neither	703-284-7000	x233	
3	Juanita Ferguson	nita.ferguson	703-284-7042	x232	2015/07/13

2. Click **Edit** below the roster.
   - The *LNO User* window opens.
3. Edit information in the fields as needed.



4. Click **SAVE**.
   - Your edits are saved.

Delete an IST contact

1. Click the row of the user you want to delete.
   - The selected row is highlighted blue.

ID	Name	AKOID	Phone Number	Extension	End Date
2	Roger Neither	roger.neither	703-284-7000	x233	
3	Juanita Ferguson	nita.ferguson	703-284-7042	x232	2015/07/13

2. Click **Delete** below the roster.
   - The user is deleted.

13.7.4 IST Notifications (Opt In)

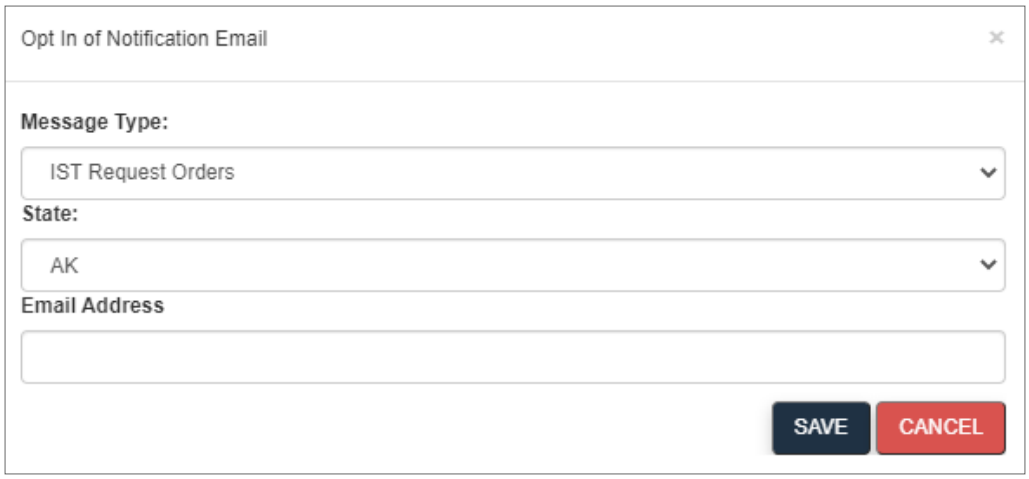
The *IST Notifications (Opt In)* screen allows Admin users to add email addresses to receive email notifications that are only sent to State users by default.

Opening IST Notifications (Opt In)

1. Click **IST Notifications (Opt In)** in the *IST* folder of the *Administration* blade.
2. *IST Notifications (Opt In)* opens in the second panel.

Add an email

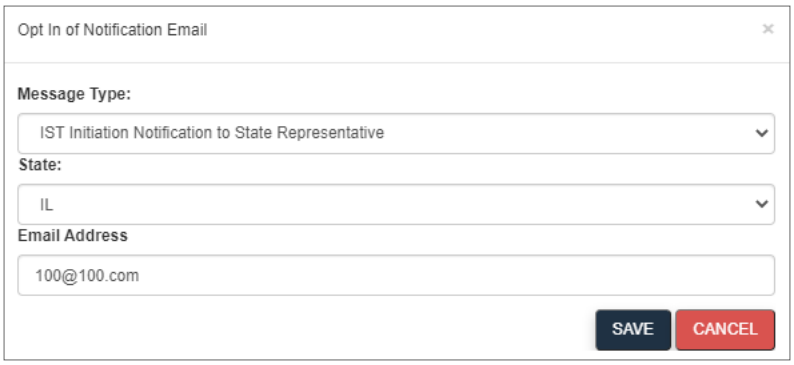
1. Click **Add** below the table.
   - The *Opt In of Notification Emails* window opens.



2. Select a *Message Type* from the drop-down list.
3. Select a *State* from the drop-down list.
4. Enter the user's email address in the provided field.
5. Click **SAVE**.
   - Your input is saved.

Edit a Notification

1. Click the notification you wish to edit.
2. Click **Edit** below the roster.
   - The *Opt In of Notification Email* window opens.
3. Edit information in the fields as needed.



4. Click **SAVE**.
   - Your edits are saved.

Delete an IST contact

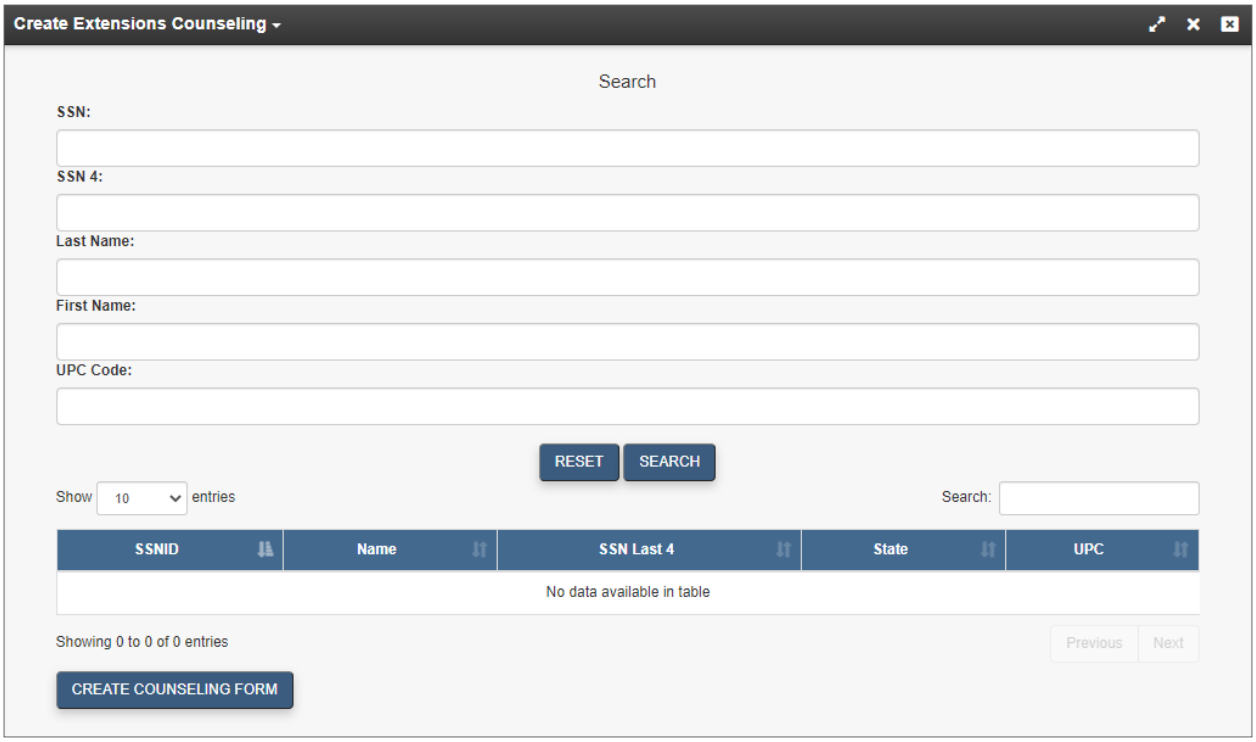
1. Click the row of the user you want to delete.
   - The selected row is highlighted blue.
2. Click **Delete** below the roster.
   - Click **YES** in the confirmation window.

13.7.5 Create Extensions Counseling

The *Create Extensions Counseling* tool allows Admin users to print prepopulated DA Form 4856 extension counseling forms for multiple Soldiers.

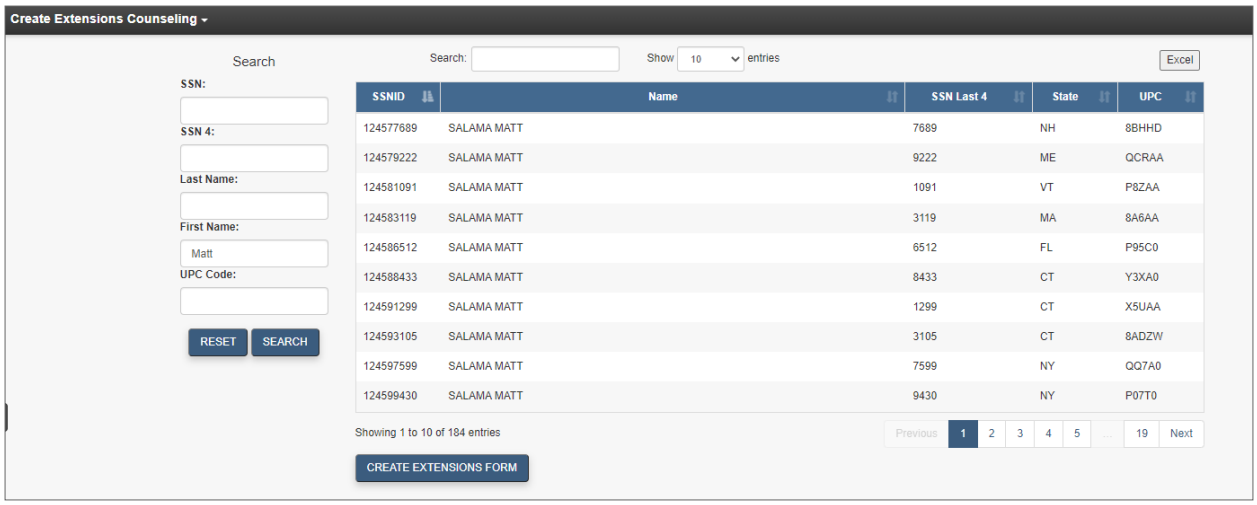
1. Expand the *Administration* folder in the *Administration* accordion tab of the *Command Center* panel.
2. Click **Create Extensions Counseling** in the *Extensions* folder.

3. *Create Extensions Counseling* opens in the second panel.



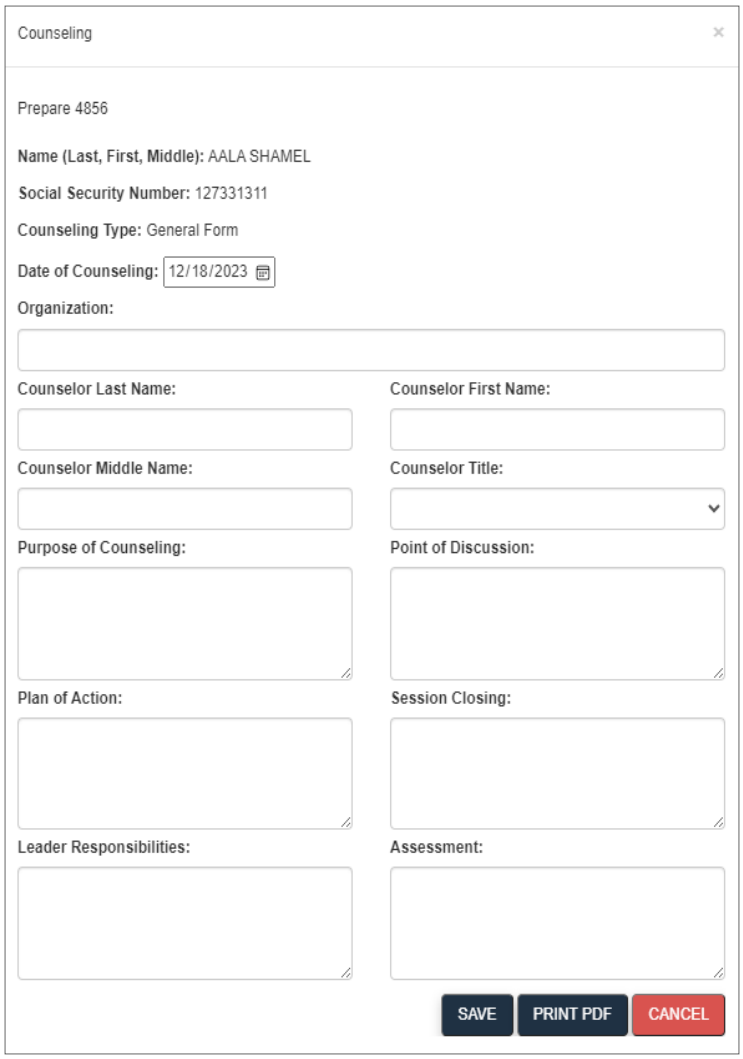
4. Enter information into any of the available fields in the *Search* panel and click **SEARCH**.

- Soldiers matching your search criteria appear in the roster.



5. Click **CREATE COUNSELING FORM**.

- The *Counseling* window opens.

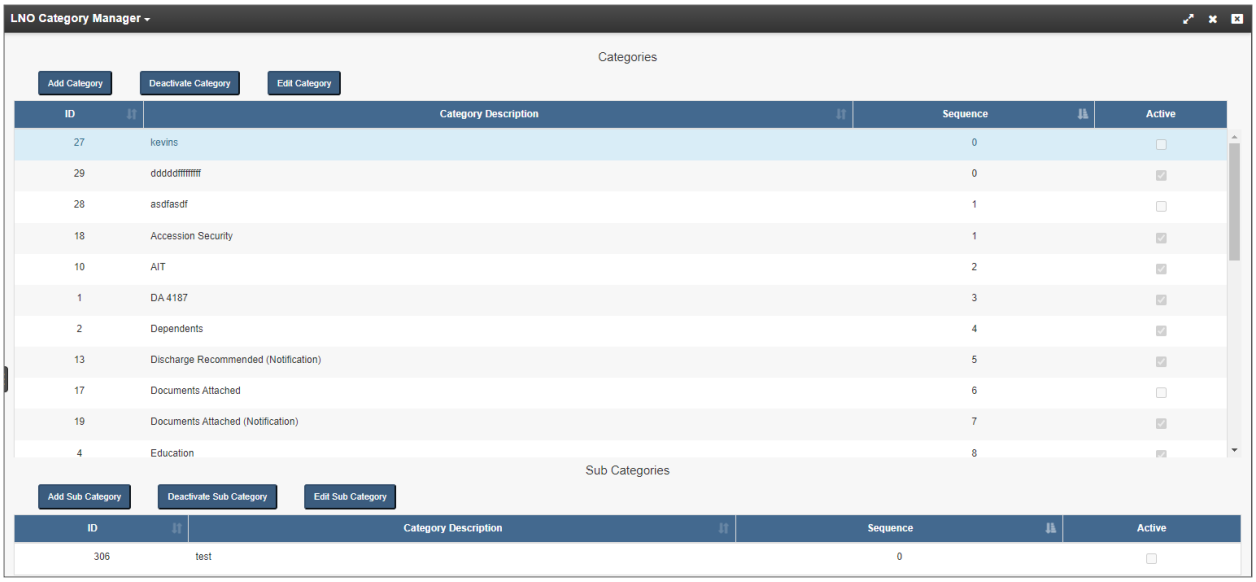


6. Fill out the appropriate information.
7. Click **PRINT PDF**.
   - A PDF of the DA Form 4856 opens in a new window populated with your input.
8. Edit the PDF input fields as needed.
9. Optionally, click the signature fields to enter CAC-authenticated digital signatures of the individual counseled and the counselor.

13.7.6 Category Manager

NGB Admin users can change the LNO ticket categories available for LNOs to choose from when creating LNO tickets. Changes apply at the national level.

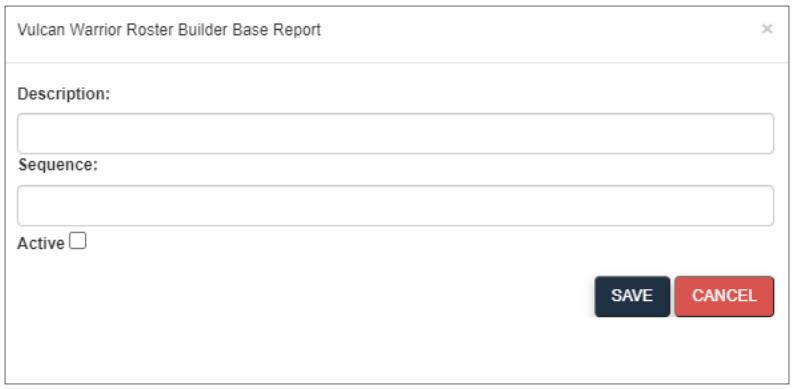
1. Click **Category Manager** in the *LNO Edit Ticket Options* folder of the *Administration* blade.
2. The *Category Manager* opens in the second panel.



13.7.6.1 Add A Category

1. Click **Add Category**.

   ▶ The *Add Category* window opens.



2. Add the category description in the *Description* field.
3. Add the category sequence in the *Sequence* field to select where in the list the new category appears.
4. Optionally, select the **Active** check box to have the new category appear among the category options in the LNO Module.
5. Click **Save**.
6. Select the new category from the *Categories* table.
7. Click **Add Sub Category**.

> **Note -** Subcategories are the items with check boxes that LNOs can select to create a ticket

for that category.

8. Repeat steps 2-5 for each subcategory.

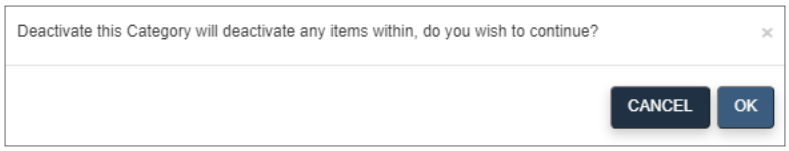
13.7.6.2 Edit A Category

1. Select a category from the list.
2. Click **Edit Category**.
   - The *Edit Category* window opens, populated with the category's settings.

3. Edit the category description in the *Description* field.
4. Edit the category sequence in the *Sequence* field to select where in the list the category appears.
5. Select or clear the **Active** check box to change whether the category appears among the category options in the LNO Module.
6. Click **SAVE**.
7. Optionally, repeat steps 2-5 for each subcategory.

13.7.6.3 Deactivate A Category

1. Click **Deactivate Category**.
   - A warning message appears.

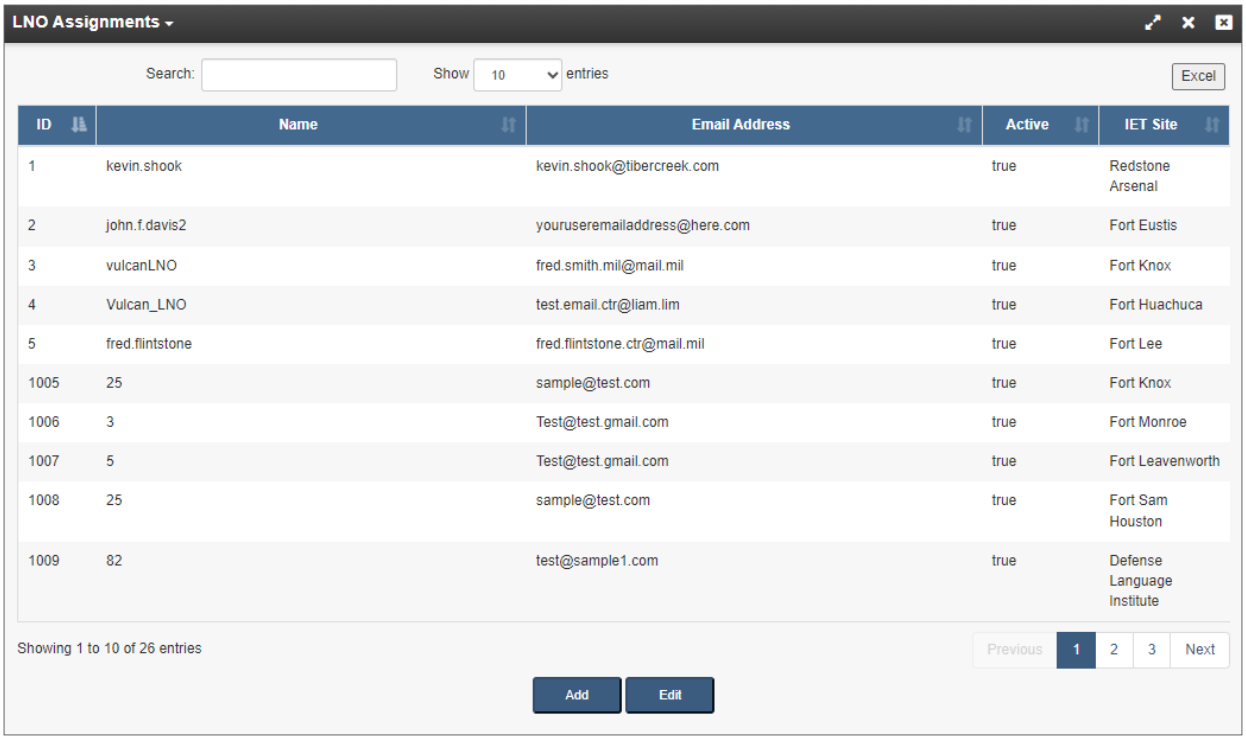


2. Click **OK**.
   - The *Active* check boxes for the category and its subcategories are cleared.

13.7.7 LNO Edit Ticket Options

NGB Admin users can use the LNO Assignments editor to view a list of every user in the UMT with the LNO role and edit those users' email addresses and IET Site association.

1. Click **LNO Assignments** within the *LNO Edit Ticket Options* folder of the *Administration* blade.
2. The *LNO Assignments* table opens in the second panel.

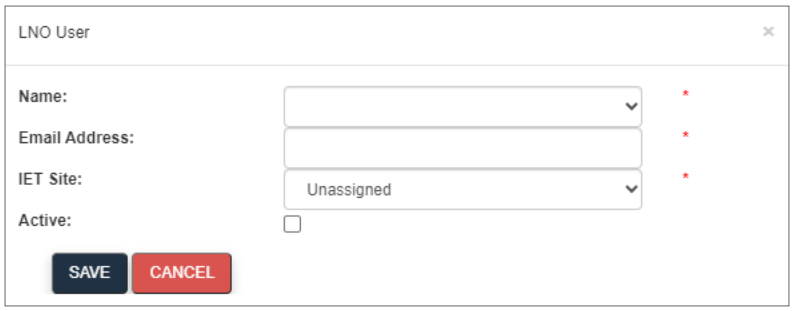


ID	Name	Email Address	Active	IET Site
1	kevin.shook	kevin.shook@tibercreek.com	true	Redstone Arsenal
2	john.f.davis2	youruseremailaddress@here.com	true	Fort Eustis
3	vulcanLNO	fred.smith.mil@mail.mil	true	Fort Knox
4	Vulcan_LNO	test.email.ctr@liam.lim	true	Fort Huachuca
5	fred.flintstone	fred.flintstone.ctr@mail.mil	true	Fort Lee
1005	25	sample@test.com	true	Fort Knox
1006	3	Test@test.gmail.com	true	Fort Monroe
1007	5	Test@test.gmail.com	true	Fort Leavenworth
1008	25	sample@test.com	true	Fort Sam Houston
1009	82	test@sample1.com	true	Defense Language Institute

> **Tip -** To view the *LNO Assignments* table in an excel spreadsheet, click the Excel button to the top right. The excel spreadsheet is downloaded to your device.

13.7.7.1 Add an LNO User

1. Click **Add**.
   - The *LNO User* window opens.

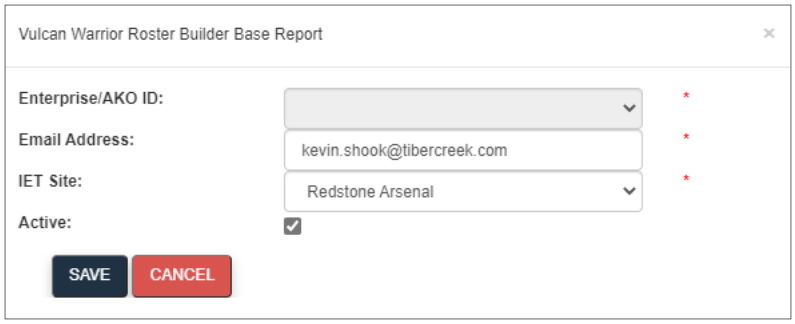


2. Choose the Enterprise/AKO ID from the drop-down.
3. Enter the user's email address.
4. Choose an IET Site from the drop-down.

5. Optionally, select the **Active** check box.
6. Click **SAVE**.

13.7.7.2 Edit an LNO User

1. Click **Edit**.
   - The *LNO User* window opens, populated with the user's settings.

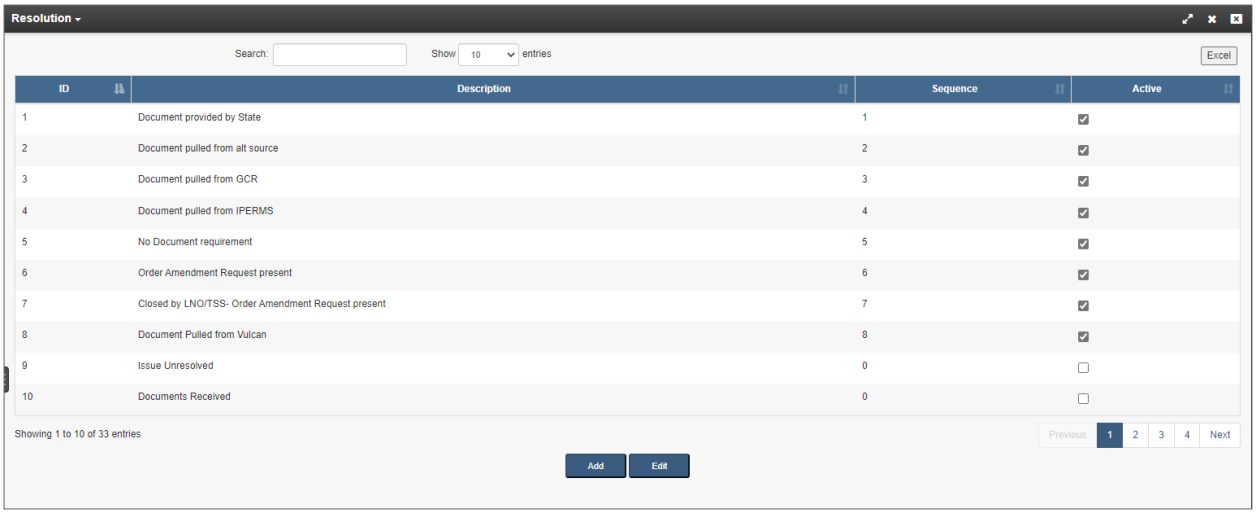


2. Edit the necessary fields and click **SAVE**.

13.7.8 Resolution

NGB Admin users can use the Resolution editor to add or remove options that appear in the *Choose Resolution of LNO Ticket* window that appears when LNOs close a case.

1. Click **Resolution** in the *LNO Edit Ticket Options* folder of the *Administration* blade.
2. The *Resolution* editor opens in the second panel.



13.7.8.1 Add A Resolution

1. Click **Add** at the bottom of the screen.
   - The *LNO Resolution* window opens.

2. Add the description in the *Description* field.
3. Add the sequence in the *Sequence* field to select where in the list the new resolution appears.
4. Optionally, select the **Active** check box to have the new resolution appear among the options in the *Resolution* window.
5. Click **SAVE**.
   - The resolution is added.

13.7.8.2 Edit A Resolution

1. Select an item from the list.
2. Click **Edit** at the bottom of the screen.
   - The *LNO Resolution* window opens, populated with the item's settings..

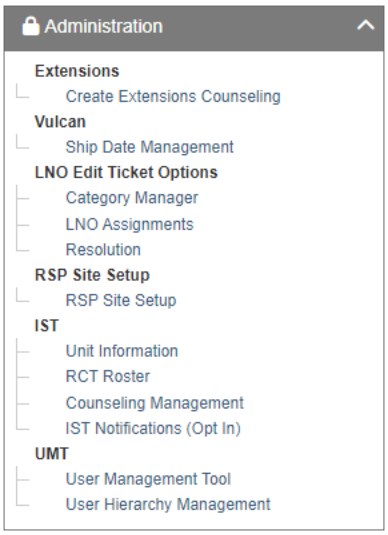
3. Edit the description in the *Description* field.
4. Edit the sequence in the *Sequence* field to select where in the list the resolution appears.
5. Select or clear the **Active** check box to change whether the resolution appears among the options in the *Resolution* window.

6. Click **SAVE**.
   - Your edits are saved.

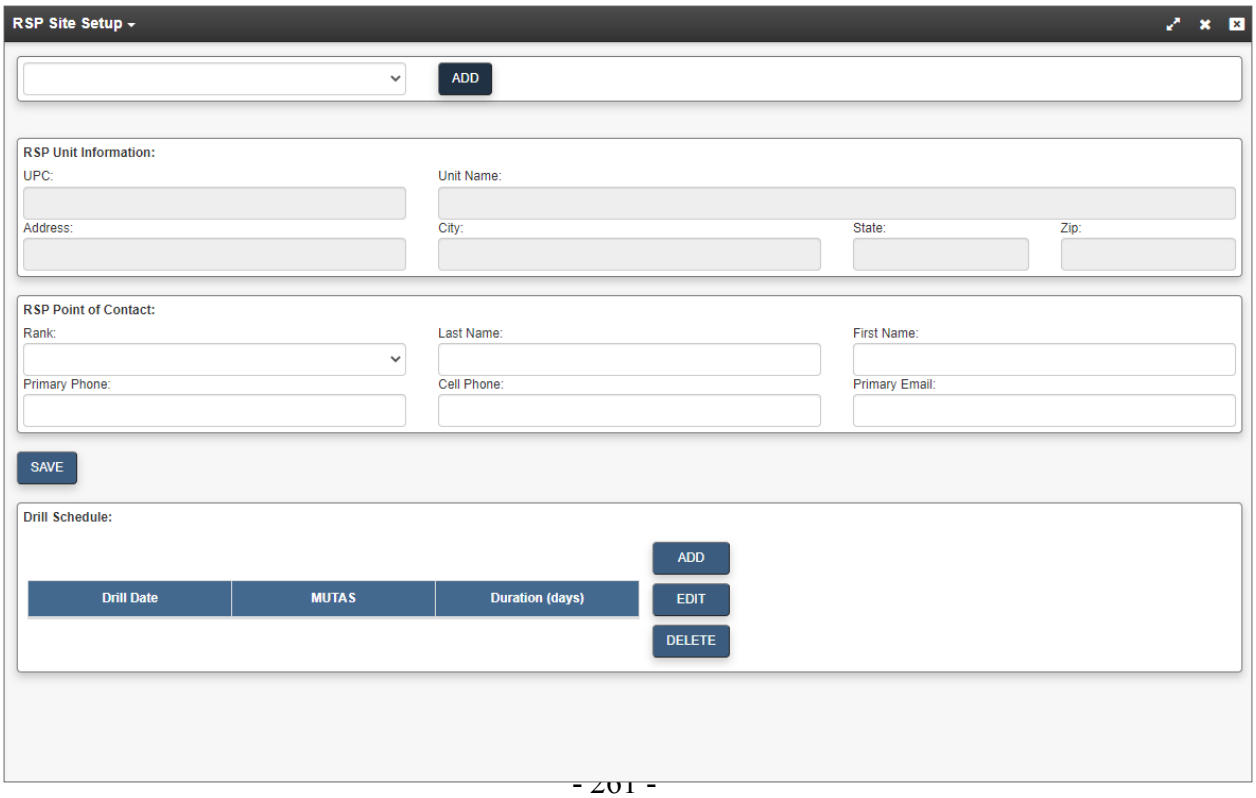
13.7.9 RSP Site Setup

Vulcan NGB and State Administrators can add new or edit existing RSP Sites with point of contact details and drill schedules.

1. Click **RSP Site Setup** in the *Administration* blade.

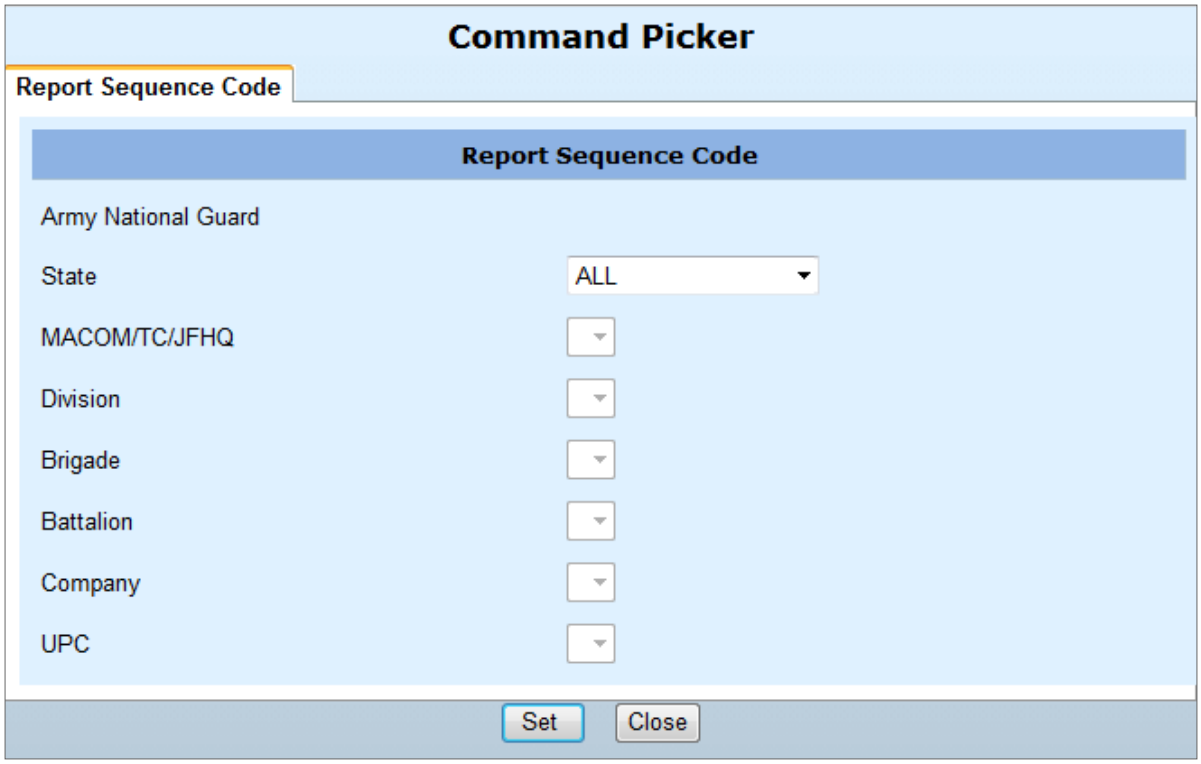


2. *RSP Site Setup* opens in the second panel.



13.7.9.1 Add an RSP Site

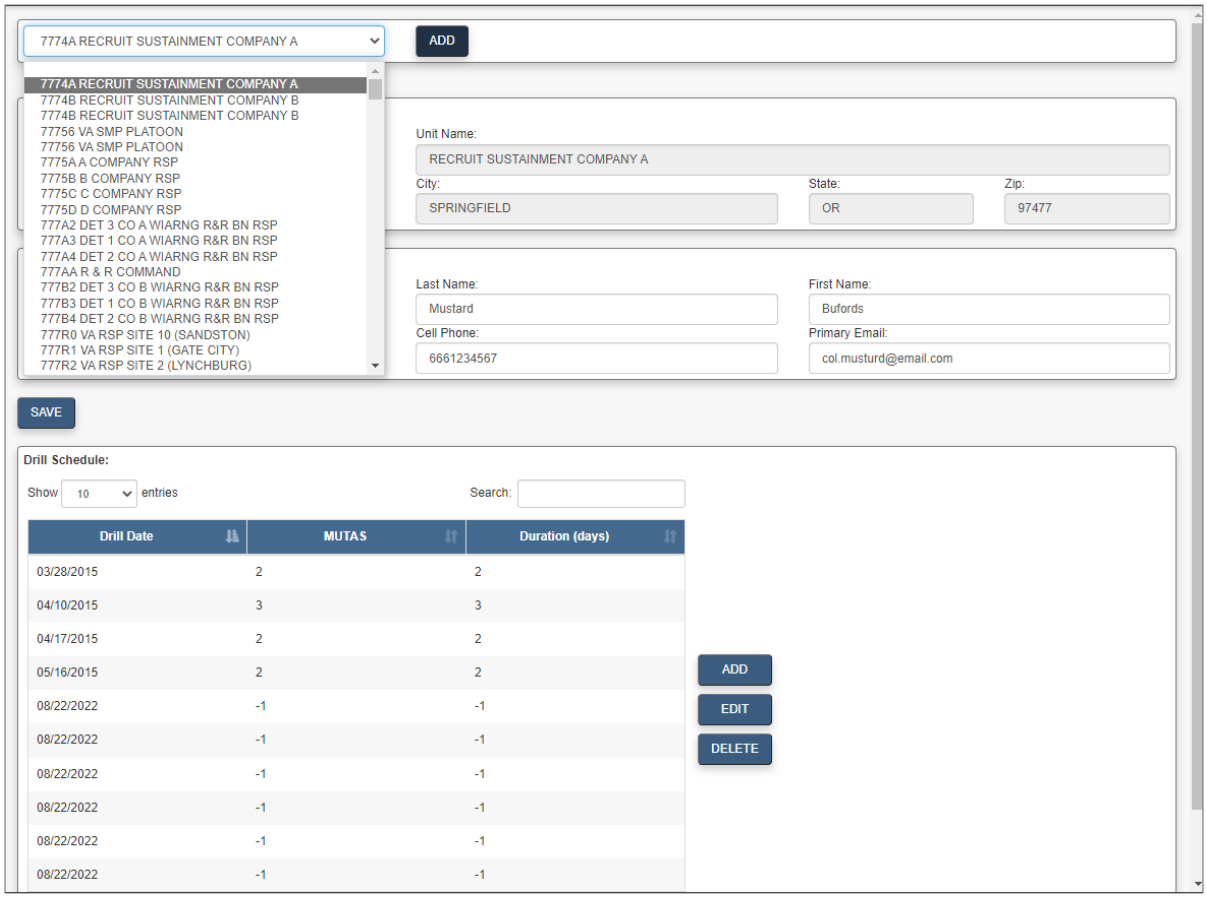
1. Click **Add**.
   - The *Command Picker* opens in a new window.



2. Navigate to the appropriate command.
3. Click **Set**.
   - The *RSP Site Setup* screen refreshes with the *RSP Unit Information* section populated with the site's information.
4. Enter contact information for the RSP Point of Contact in the applicable fields.
5. Click **SAVE**.
   - The RSP Site is added to the options in the drop-down menu.

13.7.9.2 Edit an RSP Site

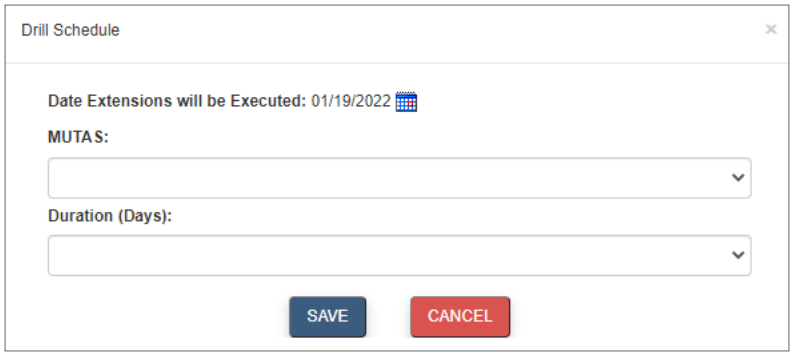
1. Open the drop-down menu and select an RSP Site to edit.
   - The *RSP Unit Information* section is populated with the site's information.



2. Edit contact information for the RSP Point of Contact in the applicable fields.
3. Click **SAVE**.

13.7.9.3 Add a Drill Date

1. Click **ADD** in the *Drill Schedule* section.
   - The *Drill Schedule* pop-up window opens.



2. Click the **Select a date** icon and select a date.
3. Click the **MUTAS** drop-down menu.
4. Select a number of Multiple Unit Training Assemblies.
5. Click the **Duration (Days)** drop-down menu.
6. Select the appropriate number of days.
7. Click **SAVE**.
   - Your selections appear in the *Drill Schedule* table.

13.7.9.4 Edit a Drill Date

1. Select a Drill Date from the *Drill Schedule* table.
   - The selected Drill Date row is highlighted blue.
2. Click **EDIT**.
   - The *Drill Schedule* pop-up window opens with the Drill Date information populated.
3. Edit the *Date*, *MUTAS*, and *Duration (Days)* fields as needed.
4. Click **SAVE**.
   - Your edits of the Drill Date appear in the *Drill Schedule* table.

13.7.9.5 Delete a Drill Date

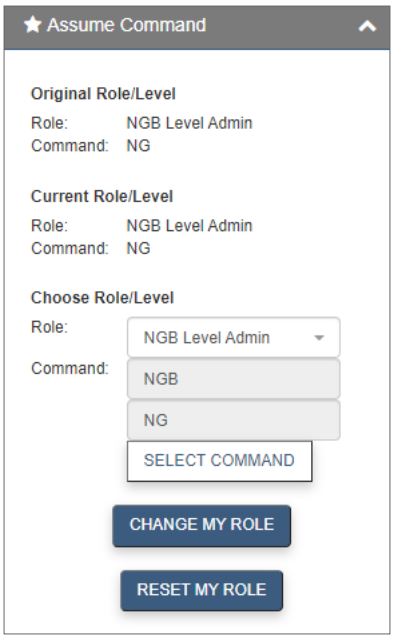
1. Select a Drill Date from the *Drill Schedule* table.
   - The selected Drill Date row is highlighted blue.
2. Click **DELETE**.

- A warning box appears asking you to confirm.

3. Click **YES**.
   - The Drill Date is deleted from the *Drill Schedule* table.

13.8 Assume Command

Assume Command is located in the Command Center panel. This functionality is available to NGB-level users and state administrators. Assume Command allows you to emulate different roles as a training tool to view RMS from lower hierarchy levels. It also grants or restricts access to actions and content based on your role.



Everyone with access to NGB view or State view can change their command level to see Vulcan RSP data from another perspective as long as that perspective is within their original command level. For example, NGB users can view Vulcan from any State or RSP Site view, while State users can view data only from different RSP Sites within their states.

13.8.1 Original Role

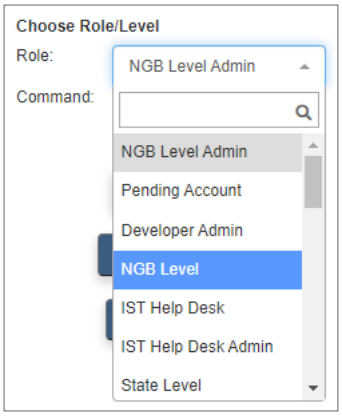
You can see your assigned role within the Assume Command tab in the *Original Role/Level* section.

RMS is equipped with the ability to change your role in order to view RMS through the eyes of a different user—as long as that user role you assume command for does not have greater permissions than your original role. This functionality allows you to see the screens that another user would see, which can help with troubleshooting any problems other users are having.

13.8.2 Change Role

If your role is IST Help Desk Admin, NGB Level Admin, or State Level Admin, you can change your command level to one of the 54 states and territories.

1. Click the **Role** drop-down menu to select a preset role.

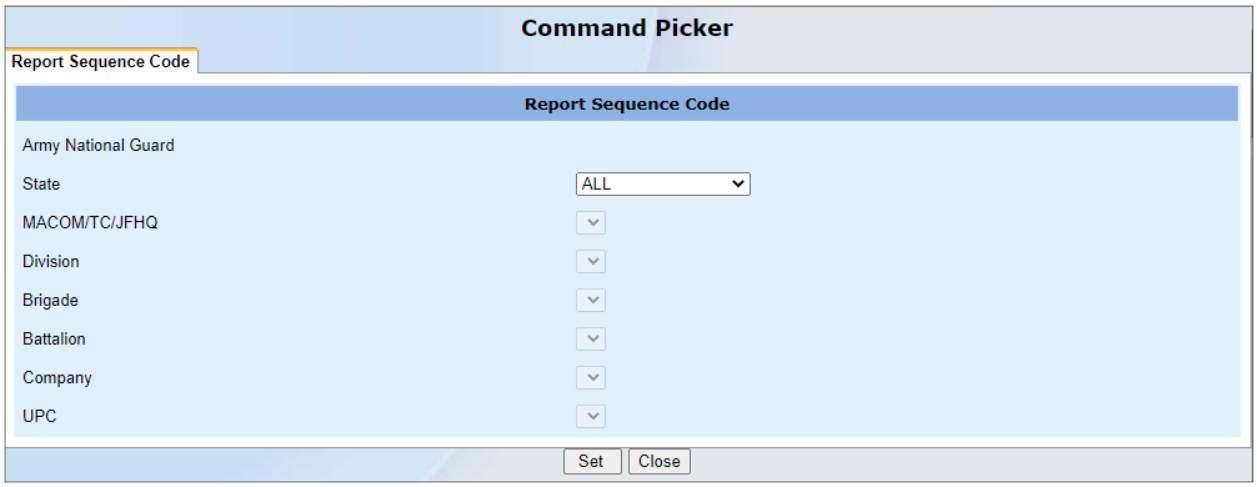


2. Select the desired role and click **CHANGE MY ROLE**.

   - Your role is changed and you are taken back to the Management Center section of the Command Center. The next time you visit the Assume Command tab, your changed role is reflected in the *Current Role/Level* box.

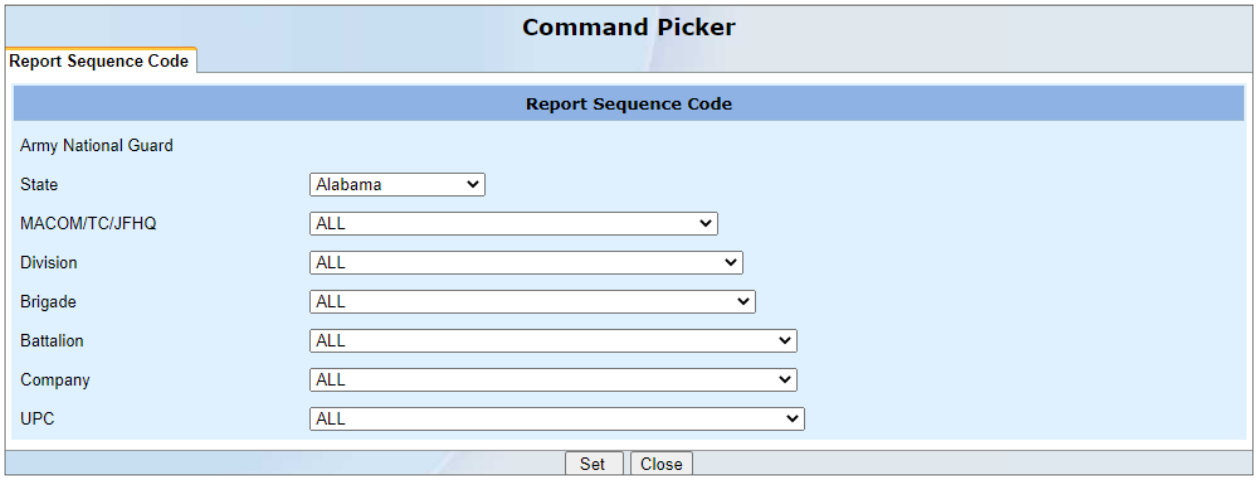
3. Click **Select Command**.

▶ The Command Picker window opens.



4. Choose a state from the drop-down list.

▶ The drop-down lists for the other fields become available.



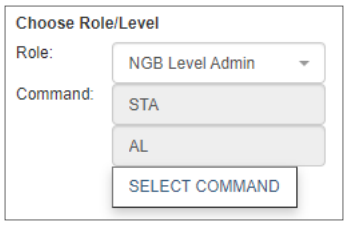
Note - The default choice is ALL for the Command Picker. Optionally, by selecting a specific state, MACOM, division, etc, the system filters the work buckets, limiting the number of Soldiers you see.

5. Select the necessary information from each list.
   Each piece of information limits what can be selected from the following drop-down list.

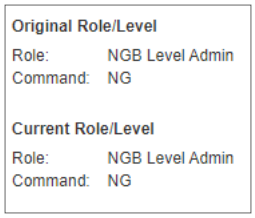
Note - The information selected affects what cases are visible in your work buckets.

6. Click **Set** when finished.

- The command level is automatically updated.

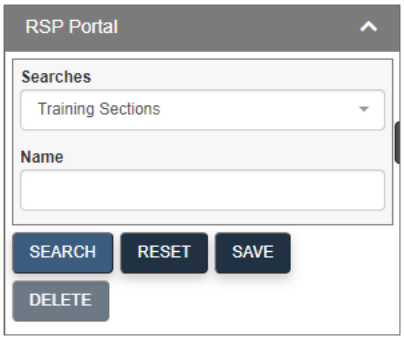


7. To return to your original role and level, click **RESET MY ROLE**.
   - Your role is reset and you are taken back to the Management Center section of the Command Center. The Assume Command tab now shows matching entries for *Original Role/Level* and *Current Role/Level*.



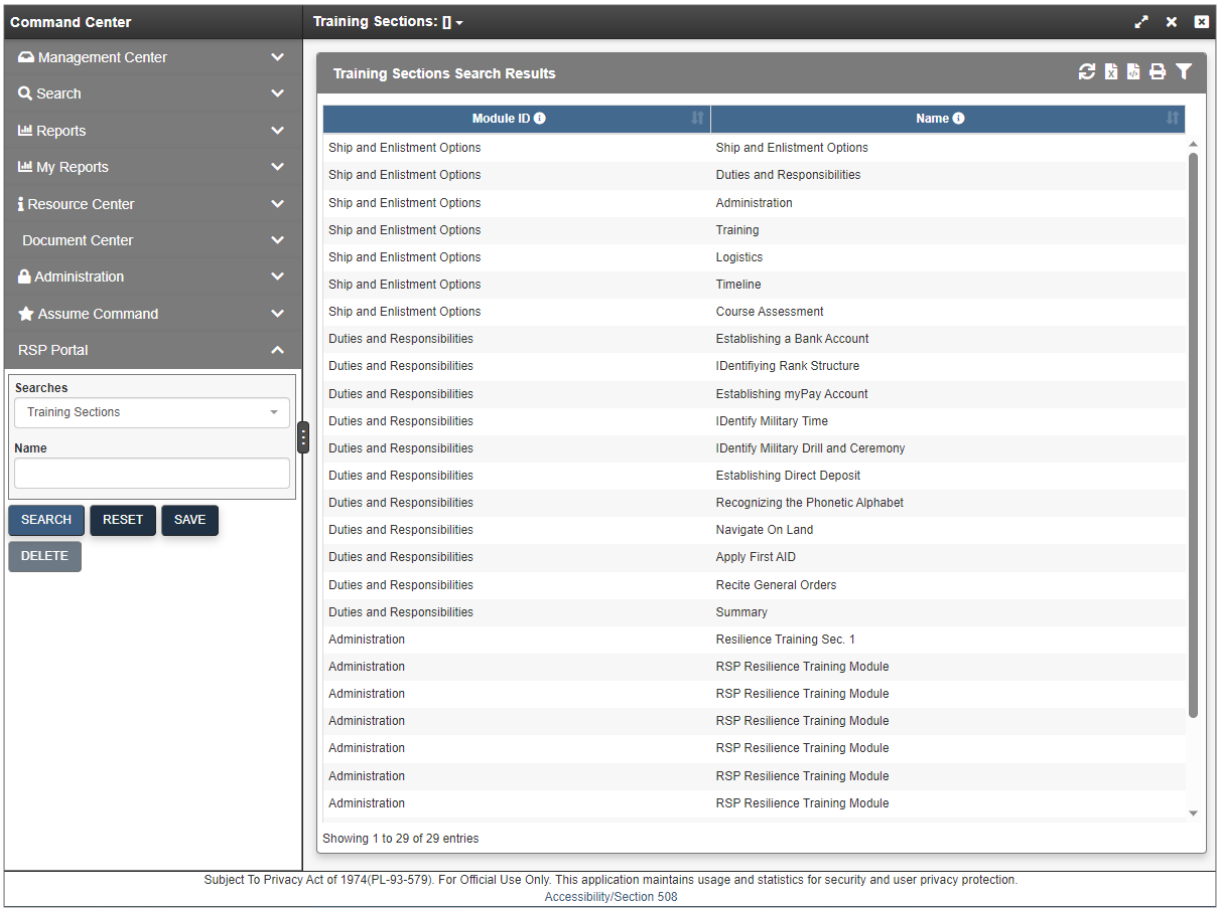
13.9 RSP Portal

The *RSP Portal* blade is located at the bottom of the Command Center and can be used to access training resources housed in the Recruit Sustainment Portal (RSP).

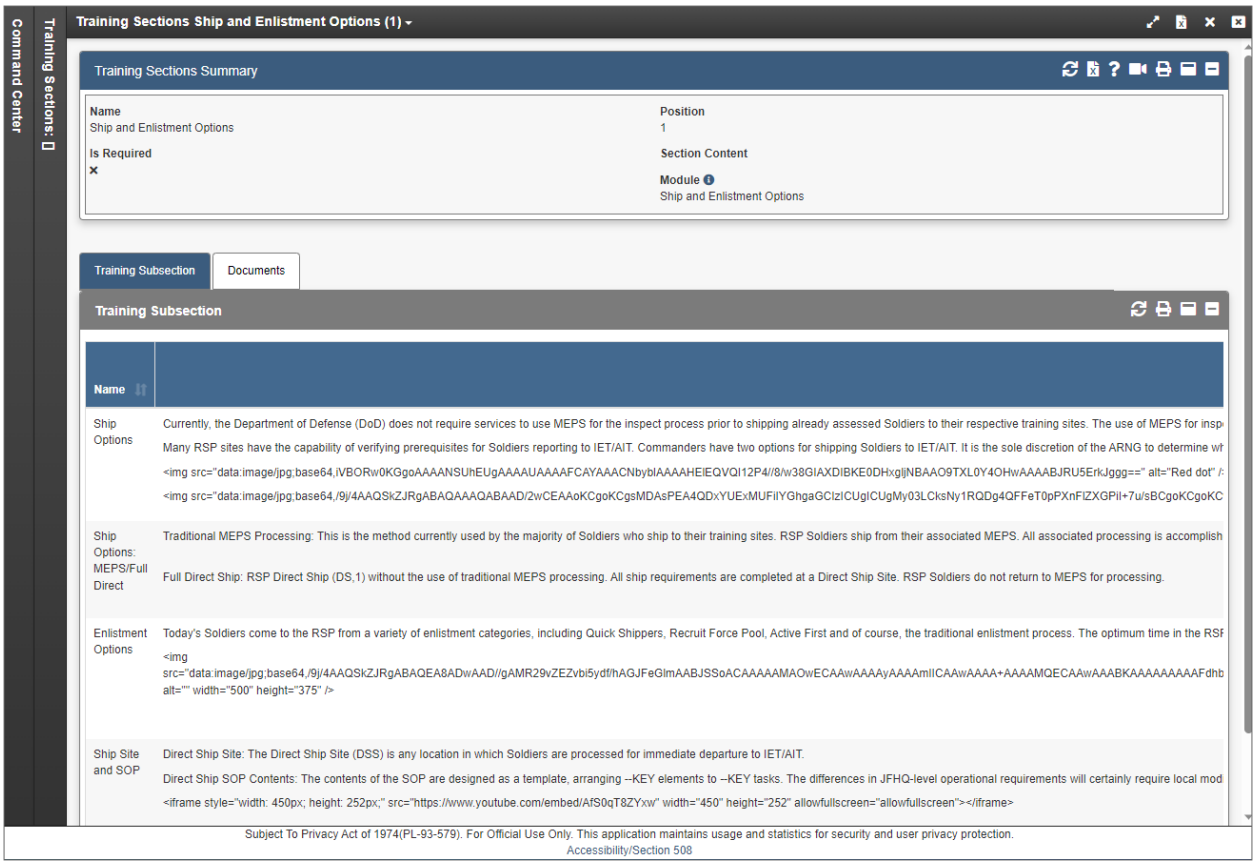


13.9.1 Training Sections

The blade opens with *Training Sections* preselected in the *Searches* field. You can enter a specific name in the *Name* field or simply click **SEARCH** to see all results.

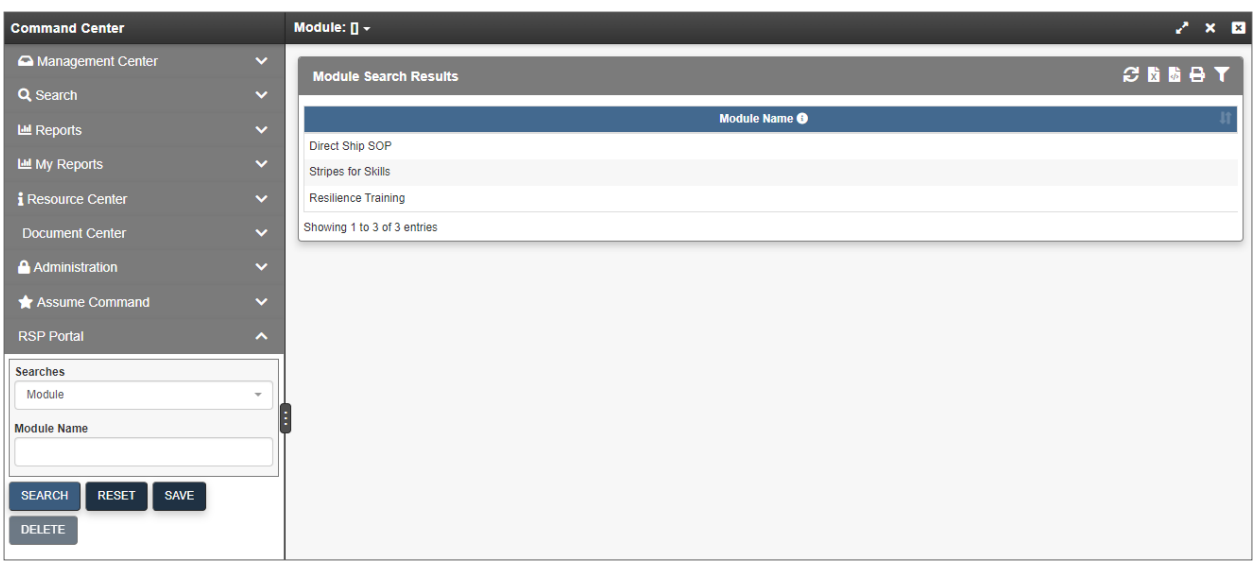

Command Center
Training Sections: []
Management Center
Search
Reports
My Reports
Resource Center
Document Center
Administration
Assume Command
RSP Portal
Searches
Training Sections
Name
SEARCH
RESET
SAVE
DELETE
Training Sections Search Results
Module ID
Name
Ship and Enlistment Options | Ship and Enlistment Options
Ship and Enlistment Options | Duties and Responsibilities
Ship and Enlistment Options | Administration
Ship and Enlistment Options | Training
Ship and Enlistment Options | Logistics
Ship and Enlistment Options | Timeline
Ship and Enlistment Options | Course Assessment
Duties and Responsibilities | Establishing a Bank Account
Duties and Responsibilities | IDentifiying Rank Structure
Duties and Responsibilities | Establishing myPay Account
Duties and Responsibilities | IDentify Military Time
Duties and Responsibilities | IDentify Military Drill and Ceremony
Duties and Responsibilities | Establishing Direct Deposit
Duties and Responsibilities | Recognizing the Phonetic Alphabet
Duties and Responsibilities | Navigate On Land
Duties and Responsibilities | Apply First AID
Duties and Responsibilities | Recite General Orders
Duties and Responsibilities | Summary
Administration | Resilience Training Sec. 1
Administration | RSP Resilience Training Module
Administration | RSP Resilience Training Module
Administration | RSP Resilience Training Module
Administration | RSP Resilience Training Module
Administration | RSP Resilience Training Module
Administration | RSP Resilience Training Module
Showing 1 to 29 of 29 entries
Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.
Accessibility/Section 508

Click a training module to open its details in Panel 3.



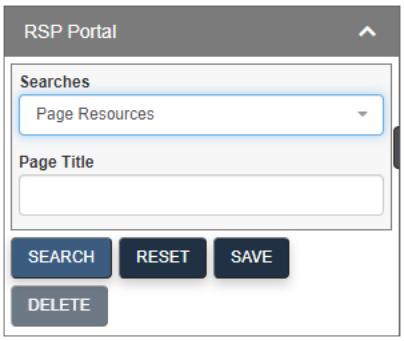
13.9.2 Module

Selecting **Module** in the *Searches* drop-down allows you to search for RSP training modules. You can also search by *Module Name*.



13.9.3 Page Resources

Selecting **Page Resources** in the *Searches* drop-down allows you to search for RSP resources. You can also search by *Page Title*.



13.10 User Management Tool

The User Management Tool (UMT) is the RMS User Guide common access management product. UMT's main purpose is to provide authorized National Guard administrators the ability to grant access and permissions to other users. Users with Common Access Cards (CACs) can request access to products, and administrators can review these requests, granting or denying them access, through UMT. Administrators validate the requested command settings, assign users one of the product's predefined roles, provide access to specific permissions within the role, and establish the member's product expiration date.

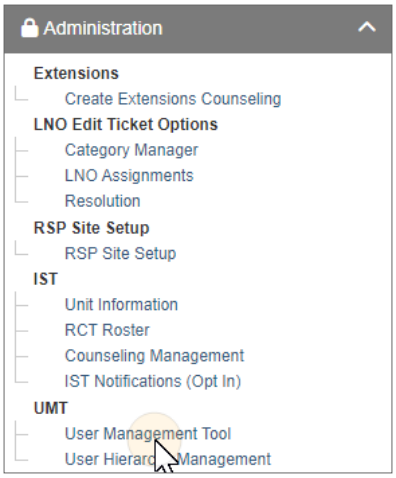
After a request has been approved, users can request role or permission changes, request a change to their command setting, or annually revalidate their access requirements through their application's "Upgrade/Revalidate" tool. Administrators use UMT to approve or deny these changes as well.

UMT also allows administrators to produce reports concerning their users, their roles and permissions, and various other product statistics.

13.11 Accessing UMT

Only users with administrative privileges can access UMT.

To access UMT, select the **Administration** blade in the *Command Center* then click **User Management Tool**.



13.12 UMT Overview

If you have experience with the multi-panel case management format used in many SIMS applications, the UMT interface will be familiar to you. This chapter covers both basic and in-depth information about how to use UMT.

Managing a user's access to RMS User Guide always follows the same basic steps:

1. In the *Command Center*, open one of the work buckets or perform a search.
   ➢ Panel 2 displays one or more names (unless the work bucket is empty or the search found no results).
2. Click a name from the list in Panel 2.
   ➢ Panel 3 opens, and the other panels are minimized.
3. Review the information provided in Panel 3 and update it as needed.
4. Select the appropriate action to allow or deny access.

The following user guide sections contain basic information for new users and detailed reference information.

Understanding the Case Management Framework on the next page

- How UMT organizes cases (users) into work buckets
- How actions work, including how actions and work buckets are connected

Navigating the UMT Panels on page 279

- Using the *Command Center* to find users via work buckets and Search

- Using Panel 2
- Using Panel 3

Controlling User Roles and Permissions in Panel 3 on page 283

In addition to a detailed explanation of the *Access Details* tab of Panel 3, you can find information on:

- Setting roles and permissions for a user
- RMS User Guide roles
- RMS User Guide available permissions
- Mapping roles to permissions

Automatic Notifications on page 299

Describes notifications that are automatically generated by the system.

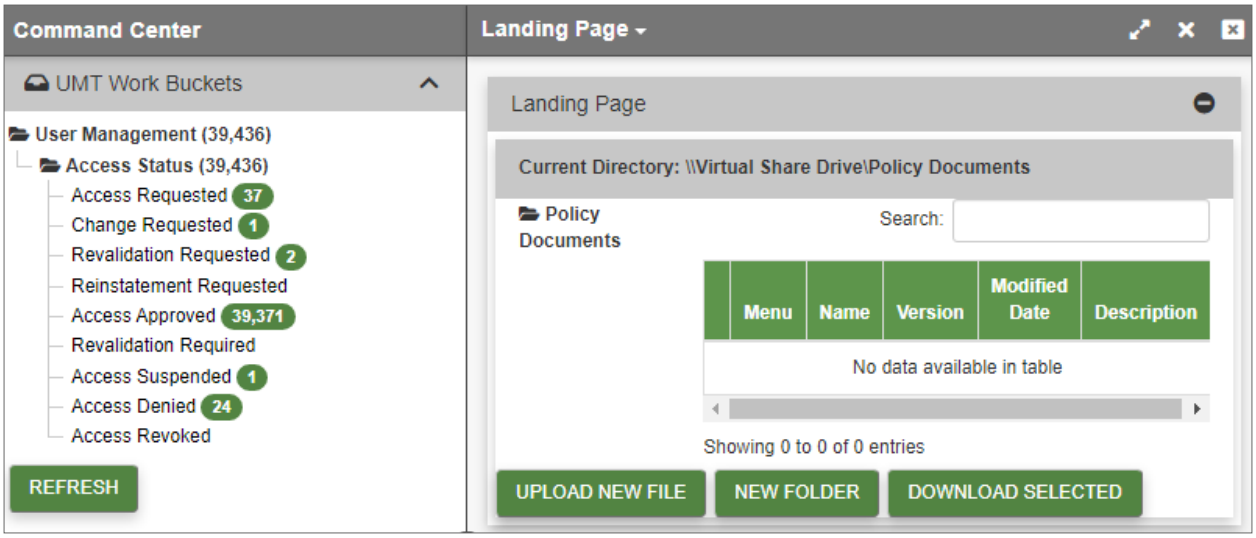
UMT Reports on page 297

Describes reports available in UMT.

13.13 Understanding the Case Management Framework

UMT leverages Case Management, a user interface that incorporates multiple panels which each perform a different function, allowing users to work on multiple items at once. Panels can be opened on top of one another without needing to close them out, and different panels can be opened side-by-side. This section covers the basics of navigating the three-panel layout of UMT.

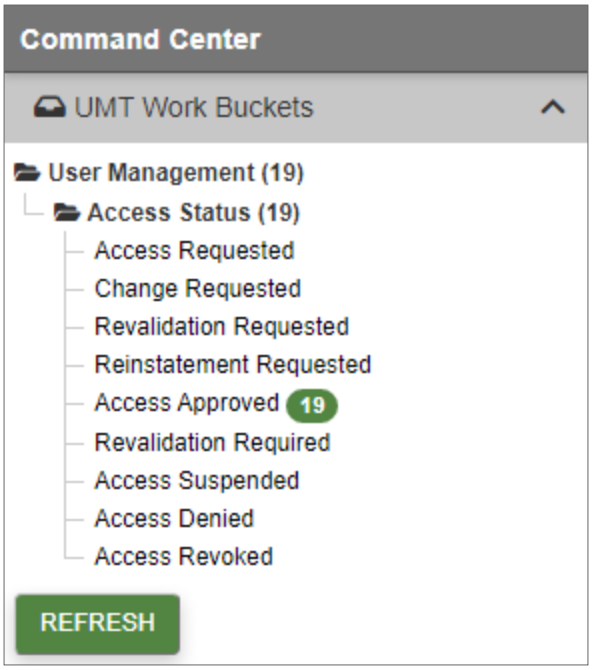
Upon accessing UMT, the first two panels appear. These are the *Command Center* (Panel 1), which provides access to your work buckets, search tools, and reports, and the *Landing Page* (Panel 2), which displays policy documents related to system access.



13.13.1 Understanding Work Buckets

UMT contains several work buckets from which Administrators manage access. These work buckets represent current states of cases and appear in the *UMT Work Buckets* blade under the *Command Center*.

Users' command settings and role levels act as constraints on which records they can manage. These constraints are applied as filters that reduce the number of records (or cases) that appear in the Administrators' work buckets. For example, if you are a Brigade Administrator, you only see those who requested brigade, battalion, or company/detachment access within your brigade.



Records also appear in work buckets based on what unit the user requested; if a user requests the wrong unit, the right administrator won't be able to see it. The number of cases you can access in each work bucket appears to the right of each work bucket label.

For a description of each work bucket, see **Mapping Manual Actions to Begin-State Work Buckets** on page 276.

If a user has requested access but you cannot see the request, please contact the Help Desk so we can review and correct the user's request, if possible.

13.13.2 Understanding Actions

The transition of records between work buckets occurs in one of two ways:

- A user or Administrator within UMT performs a manual action (for example, approving an access request).
- An automated, time-based event moves the record (for example, a user's access has expired).

For more on automated events, see **Time-Based State Transitions** on page 278.

Manual actions are initiated by clicking action buttons that appear throughout the tool, such as those illustrated below:

The system typically performs validation tests prior to performing an action, and the transition is instantaneous once the validation test is successfully completed.

> **Tip -** After clicking an action button, you may need to click **REFRESH** (underneath the work buckets) to see the updated work bucket counts. REFRESH

Following is a complete list of all manual actions that appear in UMT for RMS User Guide:

Action	Description	Account Type
Approve Access	Approve an applicant's request for access through the SAAR expiration date.	Admin
Approve Change	Approve changes requested by a member to their role or permissions, or to the duration or scope of their access.	Admin
Approve Revalidation	Approve a member's revalidation request, returning them to Access Approved until their new Account Expiration date.	Admin
Cancel Request	Cancel your request for access to the application.	User
Deny Access	Deny an applicant's request for access. The stated reason for denial is included in an automatically generated email.	Admin
Deny Change	Deny changes requested by a member to their role or permissions, or to the duration or scope of their access.	Admin
Extend Access	Extend a member's access for a short period of time while their revalidation action is pending.	Admin
Reinstate Access	Reinstate a suspended member's access, moving them back to Access Approved or to Revalidation Required (if Account Expiration is imminent).	Admin
Request Access	Submit your request for access to the application. Ensure that all required forms and requested content have been provided.	User

Action	Description	Account Type
Request Change	Submit your request for a change to your role or permissions, or to the duration or scope of your access.	User
Request Reinstatement	Request reinstatement to the application after being suspended.	User
Request Revalidation	Submit your request to extend/revalidate your access to the application. Ensure that all required forms and requested content have been provided.	User
Return for Correction	Return a member's revalidation request for rework prior to granting approval.	Admin
Revalidate Temporarily	Move a suspended user to the Revalidation Required state to facilitate a request for revalidation.	Admin
Revoke Access	Revoke a member's access to the application. Reentry after revocation requires a new access request by the user.	Admin
Suspend Access	Suspend a member's access to the application for a short period of time, after which their access is automatically revoked unless the member's access is reinstated.	Admin

13.13.2.1 Mapping Manual Actions to Begin-State Work Buckets

The manual actions are mapped to each work bucket as identified in the following table.

Work Bucket	Description	Admin Actions	User Actions
Access Requested	Users whose access requests have been submitted, and who are waiting for a review and approval of these requests by an administrator.	• Approve Access • Deny Access	Cancel Request
Change Requested	Users who have requested changes to their access parameters (i.e., command, role, permissions and/or expiration date), and who are waiting for a review and approval of these requests by an administrator.	• Approve Change • Deny Change	[None]
Revalidation Requested	Users who have requested revalidation of their access parameters (i.e., command, role, permissions and/or expiration date), and who are waiting for a review and approval of these requests by an administrator.	• Approve Revalidation • Extend Access • Return for Correction • Suspend	[None]

Work Bucket	Description	Admin Actions	User Actions
		Access • Revoke Access	
Reinstatement Requested	Previously approved users whose access has been suspended (due to non-use, an expiration of their account, or administrative action), whose access requests have been submitted, and who are waiting for a review and approval of these requests by an administrator.	• Reinstate Access • Revoke Access	[None]
Access Approved	Users who have been approved for system access through their account expiration date, within the scope of their command setting, role and permissions.	• Suspend Access • Revoke Access	Request Change
Revalidation Required	Revalidation is required for user to maintain system access. User must submit a revalidation request for administrator review.	• Extend Access • Suspend Access • Revoke Access	Request Revalidation
Access Suspended	Previously approved users whose access has been suspended due to non-use, an expiration of their account, or administrative action. Users in this category must submit a reinstatement request to reobtain access.	• Revalidate Temporarily • Reinstate Access • Revoke Access	Request Reinstatement
Access Denied	Users whose access requests have been denied by an administrator. Users in this category may submit a new access request to obtain access.	• Approve Access	Request Access
Access Revoked	Previously approved users whose access has been revoked. Users in this category must submit a new access request to reobtain access.	• [None]	Request Access

Users (i.e., members or prospective members) can impact the state of a case, even without access to the UMT tool, through actions in the *Access Request* or *Upgrade/Revalidate* tools. For example, a new user can cancel a request, removing the case from the *Access Requested* work bucket.

13.13.2.2 Mapping Manual Action Transitions to End-State Work Buckets

The following table lists whether a case is moved between work buckets, added, or removed based on its current state and the action taken.

Action	Resulting End State
Approve Access	Case is moved from Access Requested to Access Approved by Admin.
Approve Change	Case is moved from Change Requested to Access Approved.
Approve Revalidation	Case is moved from Revalidation Requested to Access Approved.
Cancel Request	Case is removed from Access Requested (by user).
Deny Access	Case is removed from Access Requested.
Deny Change	Case is moved from Change Requested to Access Approved.
Extend Access	Case is not moved, but the user's Expiration Date is extended.
Reinstate Access	Case is moved from Access Suspended to Accessed Approved or Revalidation Required.
Request Access	Case is added to Access Requested.
Request Change	Case is moved from Access Requested to Change Requested (by user).
Request Reinstatement	Case is moved from Access Suspended to Reinstatement Requested (by user).
Request Revalidation	Case is moved from Revalidation Required to Revalidation Requested (by user).
Return for Correction	Case is moved from Revalidation Requested to Revalidation Required.
Revalidate Temporarily	Case is moved from Access Suspended to Revalidation Required.
Revoke Access	Case is removed from all relevant work buckets.
Suspend Access	Case is moved from all relevant work buckets to Access Suspended.

Most actions that occur in UMT result in automatic notifications that alert both users and Admins of the changes.

13.13.2.3 Time-Based State Transitions

A small number of state transitions occur as the result of the passage of time, as opposed to a manual action taken by an Administrator or user. Time-base transitions include:

- Suspensions for non-use or failure to re-validate
- Auto-denials due to inaction on requests by Administrators

- Revocations after a period of suspension

13.14 Navigating the UMT Panels

UMT uses a three-panel layout, with each panel serving a different function:

- **Panel 1:** The *Command Center,* which allows users to view lists of records and reports
- **Panel 2:** The *Landing Page,* which displays results from work buckets in the Command Center
- **Panel 3:** The *Interactive User Managements Functions* page, where users perform most management activities

13.14.1 Panel 1: The Command Center

The *Command Center* lets you access information through sections referred to as blades. Depending on how your application is configured, your *Command Center* view may include up to three blades: *UMT Work Buckets*, *UMT Searches*, and *Reports*, as seen below.

Select a blade to view records, search for records, or view reports. Performing a search or selecting a work bucket or report displays relevant information in Panel 2.

For more information on UMT work buckets, see **Understanding Work Buckets** on page 274.

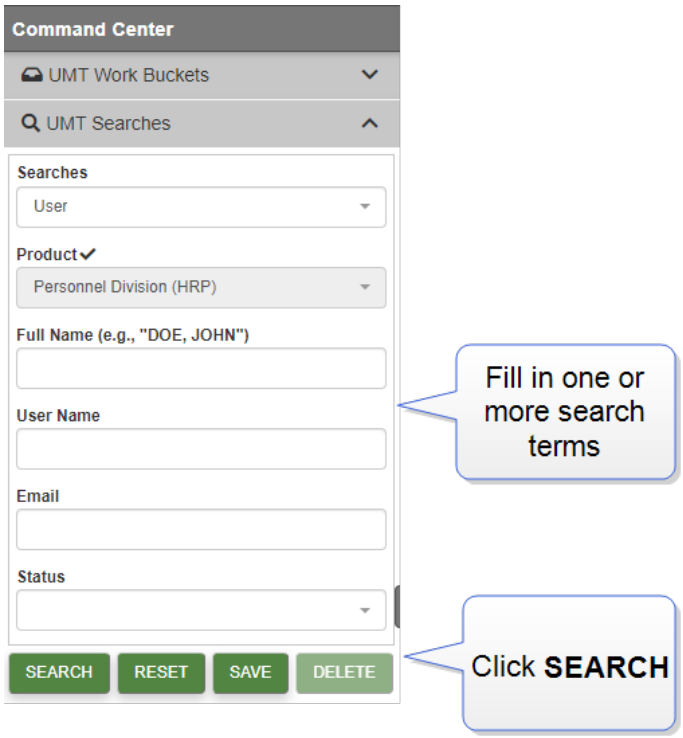
For more information on Reports, see **UMT Reports** on page 297.

For more information on UMT searches functionality, see **UMT Searches** below.

13.14.1.1 UMT Searches

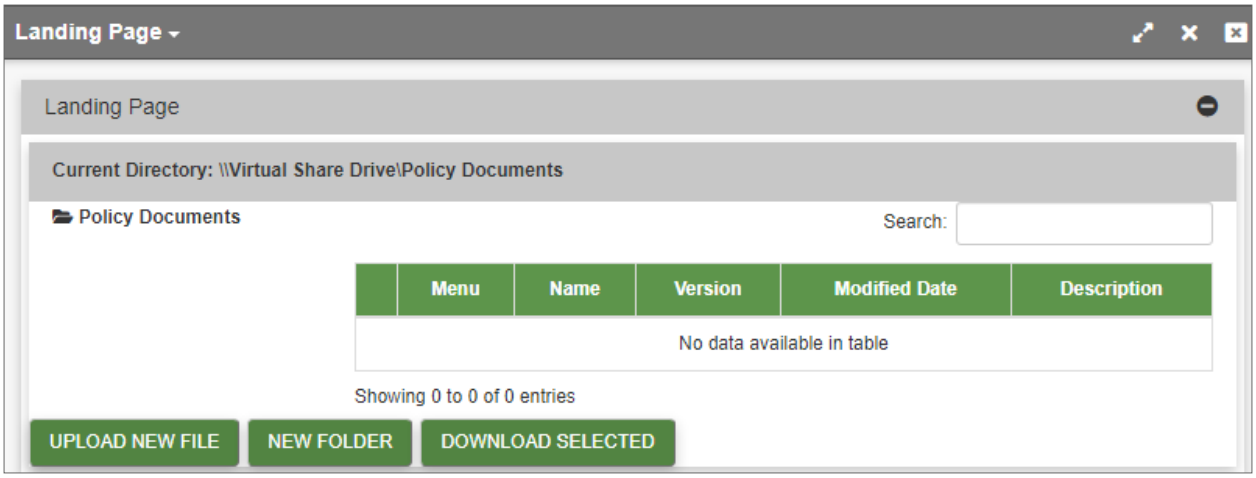
If you have the necessary permissions, you can perform a search for a user or set of users.

To perform a search, choose the search type in the Searches box, enter one or more search terms, and click **SEARCH**. There is also an option to **SAVE** your search if it's one that you use often. The **RESET** button removes all the search terms you've entered.



13.14.2 Panel 2: Landing Page and Results Display

When you initially access UMT, Panel 2 opens to the *Landing Page*. This page initially displays a Virtual Share Drive directory containing policy and procedure documents concerning user access. To download a particular document, select the box(es) in column 1 and click **DOWNLOAD SELECTED**.



Any time you select something in the *Command Center* – for example, open a work bucket or perform a search – the results appear in Panel 2. UMT displays work bucket contents and search results as lists.

Access Status - Access Approved (13)

Full Name	FASC-N	Email Address	Role	Status	Days in Status	Rank	Command Level	Command Value	Hierarchy Type
RandoLstnm, anil.narla	anil.narla	AKO.EnterpriseEmail	NGB Admin	Access Approved	701		NGB	NG	GEOG
[NLN], [NFN]	FR_User_NSCU		NGB Suicide CIMS User	Access Approved	625		NGB	NG	GEOG
[NLN], [NFN]	FR_User_NWS		NGB Watch SIR	Access Approved	625		NGB	NG	GEOG
[NLN], [NFN]	FR_User_SSCU		State Suicide CIMS User	Access Approved	625		STA	VT	GEOG
[NLN], [NFN]	christopher.gerber		NGB Admin	Access Approved	615		NGB	NG	GEOG
[NLN], [NFN]	jags.putchala	AKO.EnterpriseEmail	NGB Admin	Access Approved	615		NGB	NG	GEOG
[NLN], [NFN]	myesha.dubose		NGB Admin	Access Approved	615		NGB	NG	GEOG
[NLN], [NFN]	neil.deabreu		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	nuzhat.sanwar		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	penny.doss		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	rod.stuart		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	test.user	AKO.EnterpriseEmail	State Suicide CIMS User	Access Approved	442		STA	AR	TRAD
[NLN], [NFN]	Test_SSCU_Nuz		State Level Read - Only User	Access Approved	442		STA	NH	GEOG

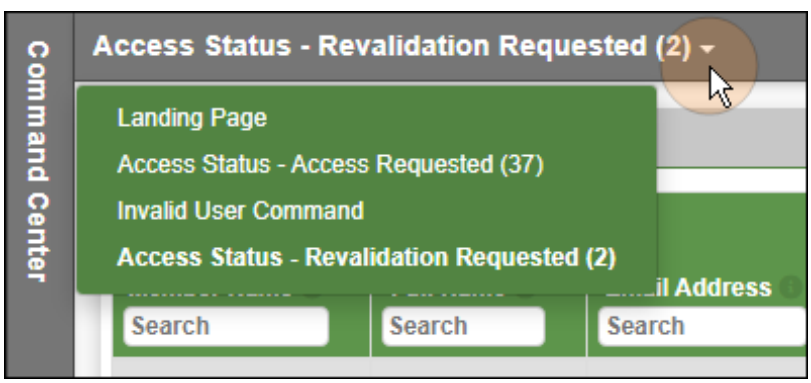
Showing 1 to 13 of 13 entries

Tip - You can filter the list by clicking the **Filter** icon. You can sort the list by clicking at the top of the column you want to sort by (for example, name or command).

Selecting a record from the list in Panel 2 opens it in Panel 3.

The Panel Bar

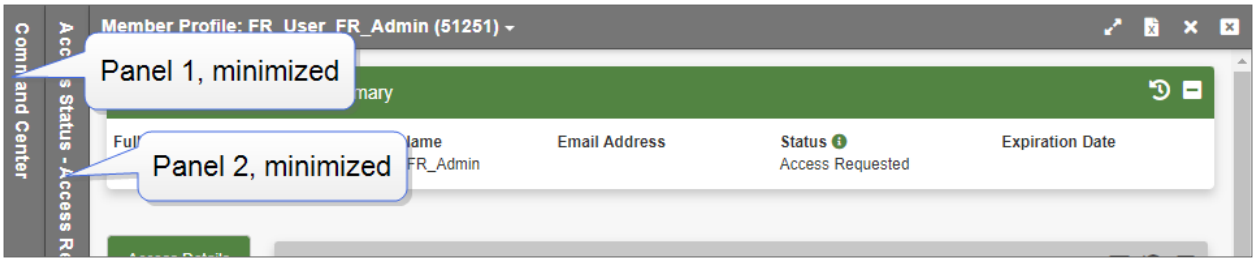
The *Landing Page* is always accessible in Panel 2 from the drop-down list across the top of the panel. Any page that the user does not manually close also remains accessible through this drop-down until the user closes the tool itself.



Note - In Panel 3, the panel bar works the same way it does in Panel 2.

Minimizing Panels

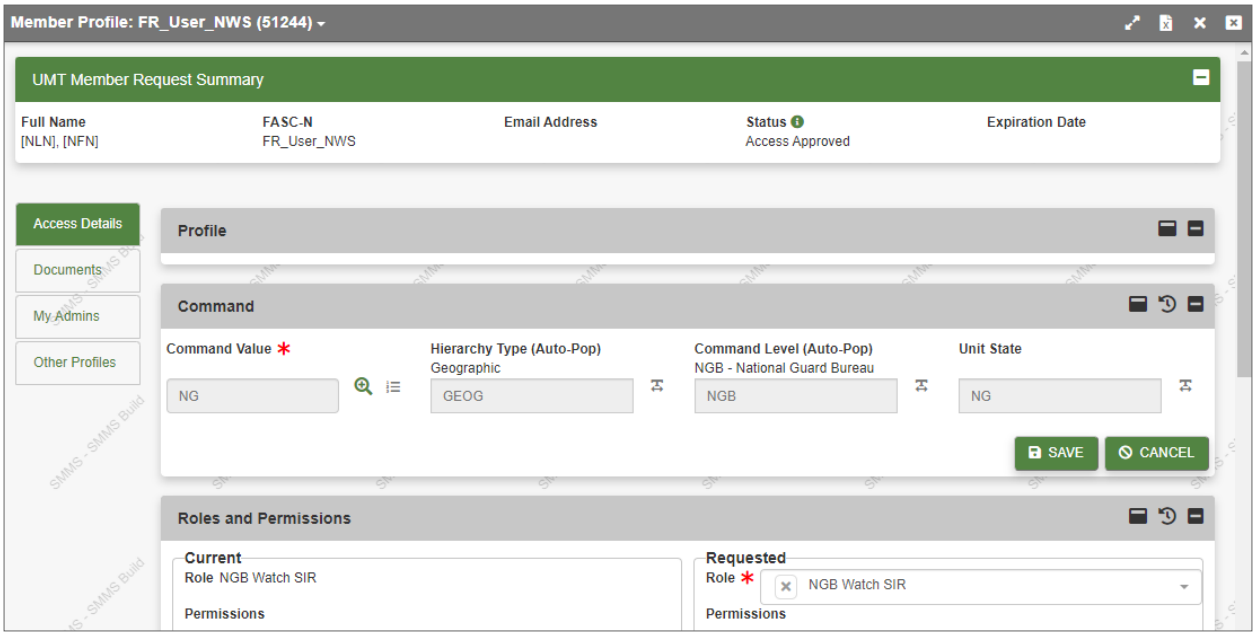
When you select a record in Panel 2, Panel 3 opens as Panels 1 and 2 minimize on the left. You can easily navigate back to Panel 1 or Panel 2 by clicking the minimized panels.



The top right corner of each panel bar contains several different icons, including tools to Refresh, Export, or Filter information. Hovering the cursor over an icon opens a tool tip describing the icon's function.

13.14.3 Panel 3: User Management Functions

Panel 3 displays information about your users and their access settings. From here you can manage their roles and permission, as well as the scope and duration of their access. This panel includes a *Summary* section at the top and navigational tabs that appear on the left side immediately beneath the *Summary*. These tabs include *Access Details, Documents*, *My Admins*, and *Other Profiles*.



The *Access Details* page opens by default. Clicking one of the other tabs opens relevant information pertaining to that tab.

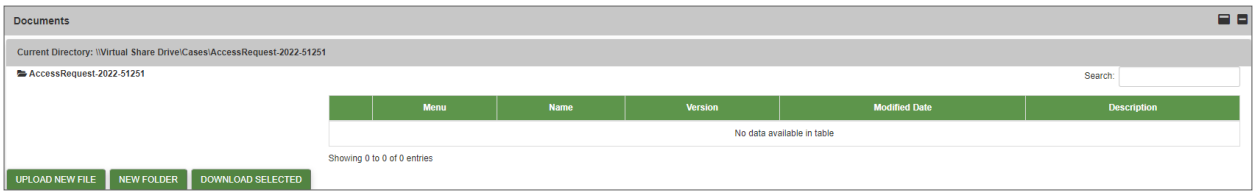
Access Details Tab

Access Details contains the command information and most of the possible actions for a case. It is described here: **Controlling User Roles and Permissions in Panel 3** on the next page.

Documents Tab

UMT allows the user to upload and download a member's System Authorization Access Request (SAAR) as part of the registration process. An Administrator may occasionally request (or a user may supply)

additional supporting documentation to justify the user's access request. These additional documents are managed under the *Documents* tab, shown below:



To upload a new document, click **UPLOAD NEW FILE**. A pop-up window appears and prompts you to upload a file. Click **Choose File** and select a file to upload, enter a File Name and Description, and click **UPLOAD**.

> **Note -** For RCMS products, the file type must have one of these extensions: pdf, tiff, tif, xps, xls, xlsx, png, doc, or docx.

To download existing documents, select one or more check boxes in the left-most column, then click **DOWNLOAD SELECTED**. The document appears in a .zip file at the bottom of the screen and is added to your *Downloads* folder.

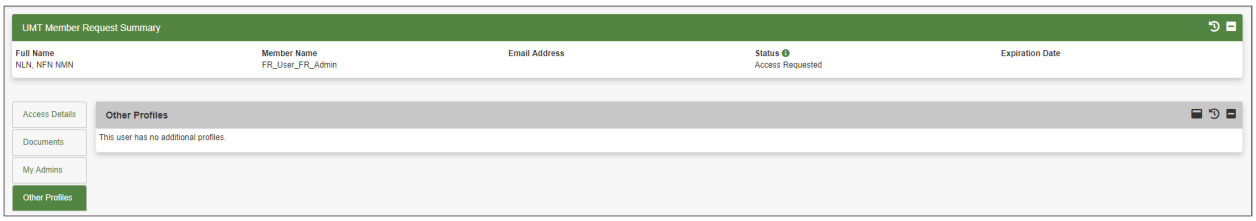
To create a new folder for uploaded documents, click **NEW FOLDER**. A pop-up window appears and prompts you to create a folder name. After you do, click **CREATE**.

My Admins Tab

My Admins shows a list of relevant administrators, including name, rank, email address, command value, and command level.

Other Profiles Tab

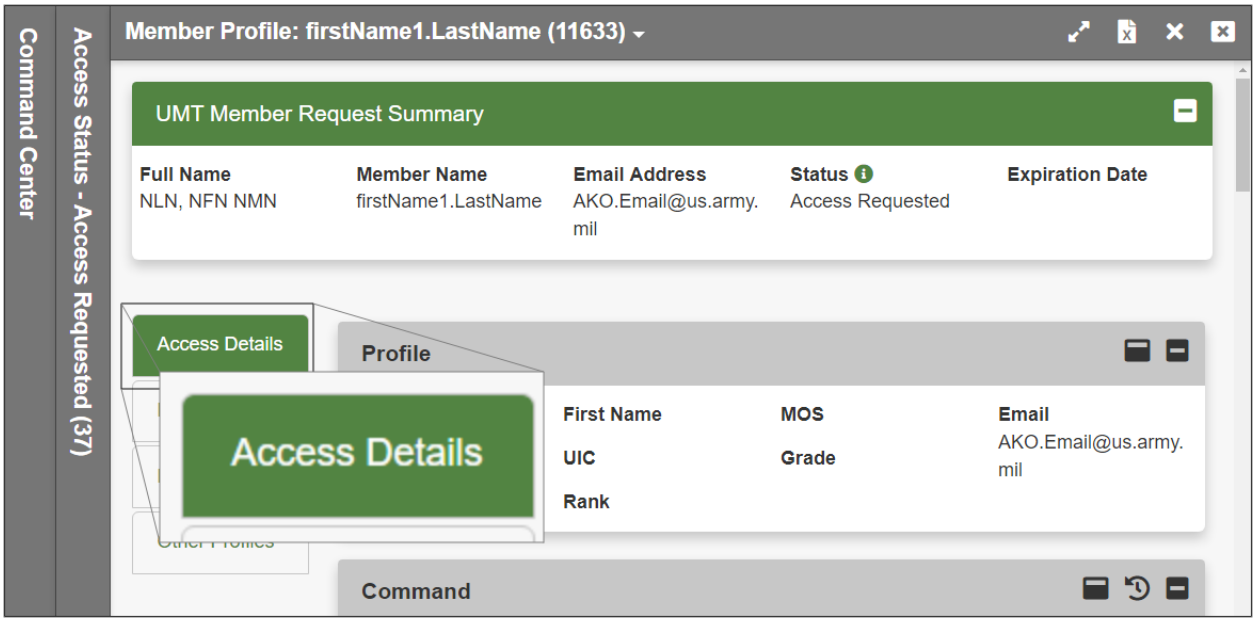
The *Other Profiles* tab provides access to a report listing all GuardOne products to which a member has ever requested access. This report contains the product name, the member's role and current status, the date that the member last accessed the product, and the date that the member's access to the product expires.



> **Note -** This report is for informational purposes only. If you are an administrator for multiple products, you must access UMT through each product individually to manage the user accounts for that product.

13.14.4 Controlling User Roles and Permissions in Panel 3

The *Access Details* section of Panel 3 is the main work area where you review and manage the cases in your work buckets.



Access Details includes several sub-sections:

- The user's profile: **Profile** below
- A section for the user's command setting: **Command** on the next page
- A section used to establish the user's role and permissions: **Roles and Permissions** on page 286
- A section where you execute actions to move the case across work buckets (e.g., approve, deny, return for re-work, etc.): **Submit** on page 294
- A read-only section where you can view all actions taken on a user's account: **History of Actions** on page 296

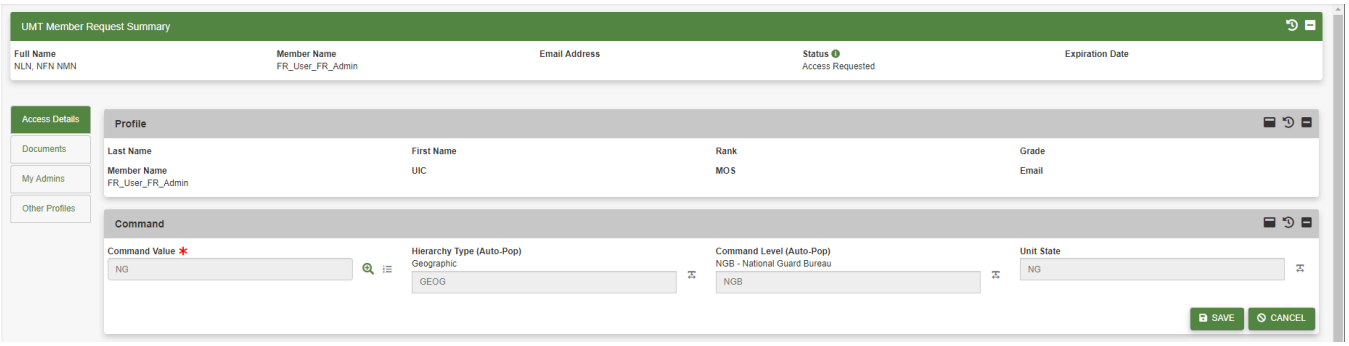
While the contents of each section are similar, they may vary slightly based on the work bucket selected. For example, a new access request only shows the prospective member's *requested* command, while a change request for an existing member shows both their *current* and *requested* command in order to help you assess the change. Sections may also vary in their editability based on the work bucket selected. For example, a case in the *Access Revoked* state displays most of its data as read-only, since that case cannot be re-opened or changed.

13.14.4.1 Profile

The *UMT Profile* is the first section that appears under *Access Details*. In RMS User Guide, the *Profile* is a non-editable section containing information mostly extracted from the user's Common Access Card, including Last Name, First Name, Rank, Grade, Member Name, UIC, MOS, and Email. These are all common fields that are considered as part of the approval process. Fields that are not applicable to a given member are left blank. Any desired changes to these field values must be addressed at the source – fields cannot be edited by RMS User Guide administrative personnel.

13.14.4.2 Command

The *Command* section displays the command access level requested by a prospective member or previously assigned to an existing member's account. Command access governs the detailed records that are visible to that member (e.g., Soldier-level), and the entry level at which they access RMS User Guide.



Existing members accessing the UMT Command section typically see read-only values above Command Value, Hierarchy Type, and Command Level fields, which represent approved values. If a change is requested, the newly requested values appear in the editable text boxes, and the user has the ability to override these fields as needed. To make these edits, click **Search** to the right of the Command Value field, select the correct values by navigating through the C2 structure drop-downs in the pop-up window that appears (the Command Picker), and click **SET** to return to the original screen. Modifications made through this single dialog are extended to all three edit boxes. Click **SAVE** to save changes and finish.

Command Edit Log

To see past changes to the user's command, click **Edit Log**. The edit log shows when specific changes were made, and by whom.

Edit Log

Search:

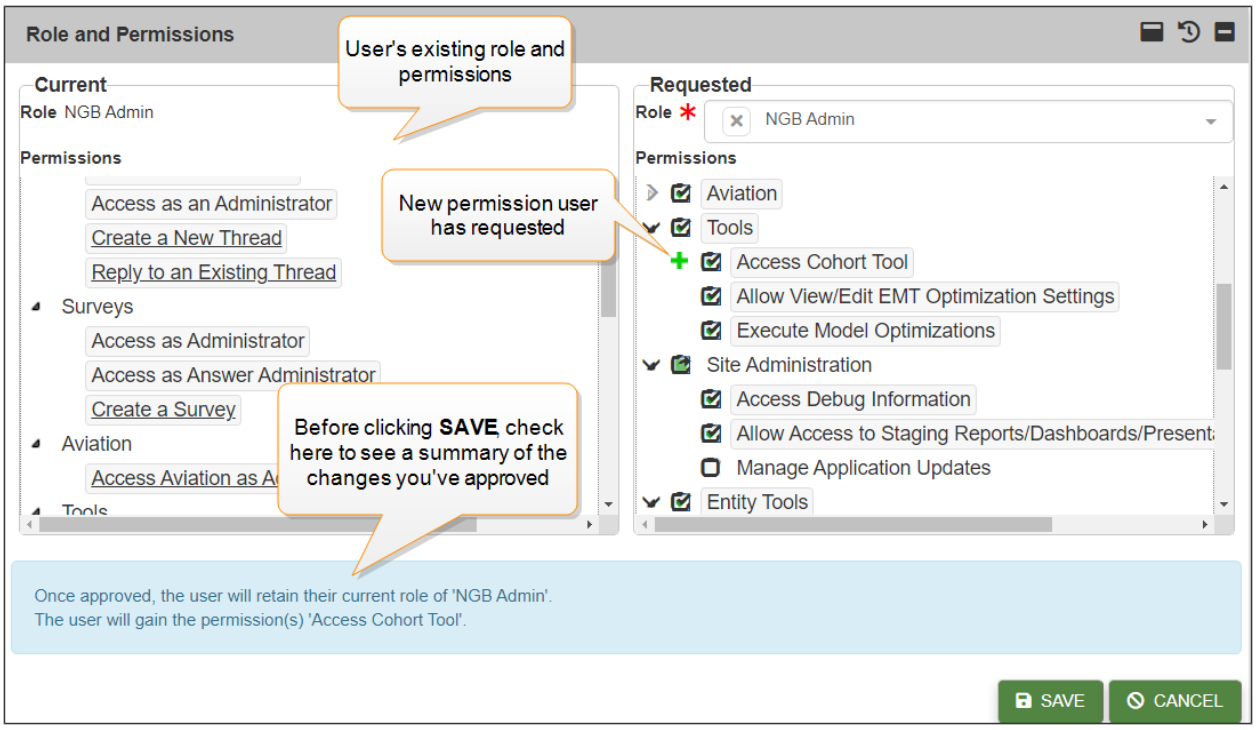
Label	Previous Value	Updated Value	Updated On	Updated By
Command Level (Auto-Pop)	NGB - National Guard Bureau	STA - State	2022-08-19T18:15:51.363	anil.narla
Command Value	NG	AK	2022-08-19T18:15:51.363	anil.narla
Hierarchy Type (Auto-Pop)			2022-08-19T18:15:51.363	anil.narla
Unit State	NG	AK	2022-08-19T18:15:51.363	anil.narla

Showing 1 to 4 of 4 entries

13.14.4.3 Roles and Permissions

The next section is the *Roles and Permissions* section, where the administrator manages items including which internal tools members can access and the level of data visible to users.

> **Note -** The following screenshot is an example not specific to RMS User Guide. It illustrates what an administrator sees when a user has requested a new permission.



Available roles and permissions vary by product and appear within functionally defined permission groups that can be collapsed or expanded by clicking on the chevron (›) to the left of each group. For existing members, *Current* roles and permissions are displayed on the left and *Requesting* roles and permissions are displayed on the right.

Each role is associated with one or more permissions, which are either included in the role by default or are optionally added by the administrator. Permissions included in the role by default are considered *Default*, and those that can be added manually are considered *Non-Default*. On the *Requested* side, *Default* permissions are underlined and appear before *Non-Default* permissions within each group.

Administrators can change a user's role and can add or revoke individual permissions as required. To change a role, click on the drop-down box under *Requesting*, and select the new role. To change permissions, toggle them on or off by checking the check boxes next to each one.

When a role is changed, *Default* permissions associated with the new role are added to the user's permissions and any *Default* permissions associated exclusively with the old role are removed. *Non-Default* permissions are preserved. A summary at the bottom of the page appears listing all changes.

Click **SAVE** to finalize all changes and finish.

Roles and Permissions Edit Log

To see past changes to the user's role and permissions, click **Edit Log**. The edit log shows when specific changes were made, and by whom.

RMS User Guide User and Administrator Roles

All users in RMS User Guide are assigned a role which determines what they can access, view, and manage. Each role includes various associated *permissions* that define the specific functions, activities, and products to which a member may have access within the application.

UMT is designed to give administrators control over what each user can do. Each role has a default set of permissions and optional permissions. It is possible to add or remove specific permissions for each individual user.

> *Example: A role provides access to an* optional *permission allowing users to view system debug information. Having this role does not guarantee that the user has access to this debug information, however, since the permission is optionally granted.*

It is also important to note that roles (and/or permissions) that are associated with administrative functions (such as "Granting Permissions") provide a given user with access to UMT through the ribbon menu. Users without an administrative role (or relevant permission) do not see this link.

The ability to approve roles is based upon the *level* of an administrative user. Levels are assigned to each role and range from 0 (the highest level) to 99 (the lowest level). As a general rule, administrative users can only view and approve UMT functions for members assigned a role at a lower level. Administrators assigned a role at level 0 can see and perform actions on all members.

> **Note -** An Administrator assigned the top-level role, 0, can approve all other roles. Any role with a level below 0 can only approve roles below than that level (e.g., a level 1 role can approve any level 2 or below; a level 4 role can approve any level 5 or below).

RMS User Guide Role	Description	Level	Administrative Role?
IST Help Desk Admin	Can complete any IST action for any state, including approve users in UMT. IST Help Desk Admin have access to the *Administration* tab functions for IST.	0	Yes
Vulcan NGB Level Admin	Can view the status of RSP in all states in the nation. They can see statistics summarizing the status of RSP in each state, view many reports, and complete all tasks that State Administrators and Users can complete.	0	Yes
Vulcan State Level Admin	Can view all the RSP Sites within a particular state. They can see statistics summarizing the status of the RSP in each of the existing RSP sites, identify units	0	Yes

RMS User Guide Role	Description	Level	Administrative Role?
	that are RSP site, view many reports, and complete many other essential tasks.		
State Level Admin	Can do everything in RMS for their own state, including approve user requests in UMT.	0	Yes
State Level Super Admin	Can view and complete everything in RMS, including adding Admin users and approving user requests in UMT. They have access to the *Override Eligibility* button on the fourth-panel *Extension Eligibility* screen to bypass all eligibility rules.	0	Yes
NGB Level	Can view all data but cannot edit anything.		No
IST Help Desk	Can complete any IST action for any state.		No
State Level	Can view all data for their own state, but cannot edit anything.		No
State IST Coordinator	Can complete losing or gaining state actions and approvals for Soldiers in their state.		No
IPPS-A	Can click the *Entered into IPPS-A* button to complete an Extension case in the IPPS-Awork bucket, or click *Return to Unit* to request corrections.		No
Battalion Level	Can view all data for their own battalion, but cannot edit anything.		No
Brigade Level	Can view all data for their own brigade, but cannot edit anything.		No
Sponsor	Can log attempts to contact a Soldier and track sponsorship activities on the *Manage Checklist* screen.		No
Vulcan LNO	Training Liaison Officers at the various IET Sites can open and maintain LNO Tickets and have read-only access to other Soldier information.		No
Vulcan User	Users with access to the RSP Site level can view all the Soldiers assigned to a particular RSP Site. They can see statistics summarizing the status of the Site, define a Site Drill Schedule, update Soldier information in bulk, and complete many other essential tasks.		No
Vulcan Read Only	Users with NGB, State, and RSP Site level roles can also be restricted to read-only access.		No
Financial	User can send a case for and sign-off on a case		No

RMS User Guide Role	Description	Level	Administrative Role?
Counselor	Budget. Work buckets are displayed, allows users to view a case budget and report.		
Transition Counselor	Users are allowed to approve a case, effectively closing a case. Work buckets are displayed and allow a user to perform duties of a Transition Counselor such as sign DD2958 as a Transition Counselor, view Reports, and ability to upload files to the VSD Library.		No
Unit Level	Can complete actions for any unit they have been granted access to in UMT.		No

Permissions

RMS User Guide has a list of permissions associated with one or more role.

Group	Permission	Description
Administration	Approve and disapprove roles	
NGB Admin	Process renewals	
RSB User	Adjudicate and require approval permissions	
RRB Commander	View Restricted Data	
RRB S1	Navigate and manage packets with first level signatory "action" abilities	
RRNCO User	Initiate case and complete preparatory information	Restricted to own case information only in read capacity
RRB User	Edit at state level. Cannot sign as other RRB roles.	

Permission	Description
AWOL: Display work buckets	Ability to display AWOL work buckets.
AWOL Close AWOL Case	Ability to terminate an AWOL case.
AWOL Complete Case	Ability to complete 4856 counseling and close the case.
AWOL Contact Soldier	Ability to contact an AWOL soldier and record their information.
AWOL Counsel Soldier	Ability to counsel a soldier from an AWOL case.
AWOL Edit Case	Ability to edit AWOL cases.
AWOL Update Contact Info	Ability to update contact

Permission	Description
	information on a AWOL case.
Document Center: Delete	Ability to delete files from a Soldier's document center.
Document Center: Upload	Ability to upload files to a Soldier's document center.
Document Center: Vulcan RSP	Ability to view Vulcan RSP from a Soldier's document center.
Extension: Battalion Review	Ability to review Extension cases in the Battalion work bucket.
Extension: Brigade Review	Ability to review Extension cases in the Brigade work bucket.
Extension: Display work bucket's	Ability to display Extension work buckets.
Extension: IPPS-A Review	Ability to review Extension cases in the IPPS-A work bucket.
Extension: State Review	Ability to review Extension cases in the State work bucket.
Extension Counseling	Ability to conduct counseling for Extension cases.
Extension Enter into IPPS-A	Ability to enter an extension in IPPS-A and complete it.
Extension Enter Override	Ability to override data value for Soldier's in Extension cases.
Extension Issue Incentive Contract	Ability to issue a bonus contract for Extension cases.
Extension Override Eligibility	Ability to override eligibility for Extension cases.
Extension Process 4836	Ability to complete and upload document 4836 to the case.
IST: Display work bucket's	Ability to display IST work buckets.
IST: Help Desk	Ability to access the IST Help Desk.
IST: Help Desk Admin	Grants IST Help Desk access to users.
IST: Override Risk Level	Ability to override risk levels for IST cases.

Permission	Description
IST: Reject Para/Line	Ability to reject assigned Paragraph/Lines for IST cases.
IST: Reopen Case	Ability to reopen IST cases.
IST: Reset Case	Ability to reset IST cases.
IST: State Level User	Grants state level access to the user for IST cases.
IST: Terminate Case	Ability to terminate IST cases.
IST: Unit Level User	Grants unit level access to the user for IST cases.
IST: Update Contact Info	Ability to update contact information on an IST case.
IST: Verify Orders	Ability to verify cases and orders for IST cases.
NGB Admin	Grants NGB Administrator access to user.
Process: Vulcan LNO; Action: Case Closed; Current: New; To: Closed	Ability to close Vulcan LNO cases from the New work bucket.
Process: Vulcan LNO; Action: Case Closed; Current: Returned to LNO; To: Closed	Ability to close Vulcan LNO cases from the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Case Closed; Current: Returned to State; To: Closed	Ability to close Vulcan LNO cases from the Returned to State work bucket.
Process: Vulcan LNO; Action: Case Terminated; Current: New; To: Terminated	Ability to terminate Vulcan LNO cases from the New work bucket.
Process: Vulcan LNO; Action: Case Terminated; Current: Returned to LNO; To: Terminated	Ability to terminate Vulcan LNO cases from the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Case Terminated; Current: Returned to State; To: Terminated	Ability to terminate Vulcan LNO cases from the Returned to State work bucket.
Process: Vulcan LNO; Action: Return to LNO; From: Returned to State; To: Returned to LNO	Ability to move Vulcan LNO cases from the Returned to State work bucket to the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Returned to LNO; Current: New; To: Returned to LNO	Ability to move Vulcan LNO cases from the New work bucket to the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Returned to State; Current: Returned to LNO; To: Returned to State	Ability to move Vulcan LNO cases from the Returned to

Permission	Description
	LNO work bucket to the Returned to State work bucket.
Sponsorship: 1st Drill Orientation	Grants 1st Drill Orientation sponsor access.
Sponsorship: 1st Line Leader	Grants 1st Line Leader sponsor access.
Sponsorship: 1st Sergeant	Grants 1st Sergeant sponsor access.
Sponsorship: Commander	Grants Commander sponsor access.
Sponsorship: Display work bucket's	Ability to display Sponsorship work bucket's.
Sponsorship: Initial Contact Prior to 1st Drill	Ability to access Initial Contact Prior to 1st Drill.
Sponsorship: Readiness NCO	Grants Readiness NCO access.
Sponsorship: Supply Sergeant	Grants Supply Sergeant access.
Sponsorship Add Note	Ability to add a note to a Sponsorship case.
Sponsorship Assign Sponsor	Ability to assign a sponsor to a Sponsorship case.
Sponsorship Close Sponsorship	Ability to mark a Sponsorship case as closed.
Sponsorship Complete Checklist	Ability to complete the checklist for a Sponsorship case.
Sponsorship Contact Soldier	Ability to contact a Soldier about their Sponsorship case.
Sponsorship Contact Sponsor	Ability to assign and contact a sponsor to a Sponsorship case.
Sponsorship Print Checklist	Ability to print a checklist for a Sponsorship case.
Sponsorship Reassign Sponsor	Ability to reassign a sponsor for a Sponsorship case.
Sponsorship Return Checklist	Ability to return a checklist to the sponsor for a Sponsorship case.
Sponsorship Terminate Case	Ability to terminate a Sponsorship case.
Sponsorship Update Contact Info	Ability to update contact information on a Sponsorship case.

Permission	Description
State Admin	Grants State Admin access to the user.
Transition Service: Approve Case	Allows user to approve a case effectively closing it.
Transition Service Budget Review	Allows user to send a case for budget review.
Transition Service Budget Sign Off	Allows user to sign off on a case budget.
Transition Service Commander Sign	Allows user to sign DD2958 as a Commander.
Transition Service Display	Ability to display Transition Display work bucket's
Transition Service Terminate Case	Allows user to terminate a case.
Transition Service: Transition Counselor	Allows user to perform duties of a Transition Counselor.
Transition Service: Transition Counselor Signoff	Allows user to sign DD2958 as a Transition Counselor
Transition Service: View Budget	Allows user to view a case budget.
Transition Service: View Question History Tab	Allows user to view the question history tab.
View Reports	Ability to access and view the Reports blade.
View Vulcan	Ability to view Vulcan work bucket's.
VSD Delete Files	Ability to delete files from VSD library.
VSD Upload Files	Ability to upload files to the VSD library.
Vulcan Can Edit	Ability to edit Vulcan cases.
Vulcan Edit Closed Ticket	Ability to edit closed Vulcan tickets.
Vulcan LNO: Terminate Case	Ability to terminate Vulcan LNO cases.
Vulcan NGB Admin	Grants Vulcan NGB Admin access to user.
Vulcan View Document Tab	Ability to view the Document tab in the 3rd and 4th panels of the Vulcan work bucket.
Vulcan Add Comments	Ability to add comments in Vulcan work buckets.
Vulcan Disposition Override	Ability to override disposition

Permission	Description
	for Vulcan cases no matter the IET status.
Vulcan VSD Delete Files	Ability to delete files from the Vulcan VSD library.
Vulcan VSD Upload Files	Ability to upload files to the VSD library.
Admin: Receive Notifications	Ability for administrators to receive notifications.
Extension: Display Career Development Counseling	Ability to display Career Development Counseling work buckets
Vulcan LNO	Grants Vulcan LNO access to user.
Vulcan Read Only	Grants Vulcan Read Only access to user.
Vulcan State Admin	Grants Vulcan State Admin access to user.
Vulcan User	Grants Vulcan User access to user.

Mapping of Roles to Permissions

Each role has a corresponding list of default and optional permissions that control what the user can do. The chart below displays a cross-tab of roles (across the top) and permissions (down the side). Items shown with a "D" (in green) are *Default* permissions, meaning the user obtains this permission by default at the time they are awarded the role. Items shown with an "O" (in gray) are optional permissions, meaning these permissions are available to be assigned, but not assigned by default.

See Appendix A.

13.14.4.4 Submit

The *Submit* section allows the user to record remarks and perform actions that result in a change of status.

Entering a remark before clicking an action button provides a narrative that is stored with the action you take. Remarks are frequently transmitted to users or administrators as a component of the automated notification system. Remarks are mandatory for all actions with a RED action button, and optional but recommended for actions with a GREEN action button. In the example above, approval of the access request does not require a remark, but denial does require a remark explaining the reason, which is transmitted back to the user.

Selecting an action moves a case from one state (work bucket) to another. In the example above, the member's case resides in the *Access Requested* work bucket until the user clicks either **APPROVE ACCESS** or **DENY ACCESS**. Once one of these actions is performed, the case moves to the appropriate work bucket. Changes might include a modified command setting, a new role, or changes to permissions.

Action Validations

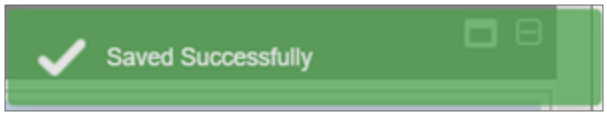
When you click an action button, the system first asks for confirmation of the action and then performs validation tests to ensure that all required entries have been completed. Below is a screen shot of the confirmation pop-up. To confirm and continue, click **YES**. To return to your case and not continue, click **NO**.

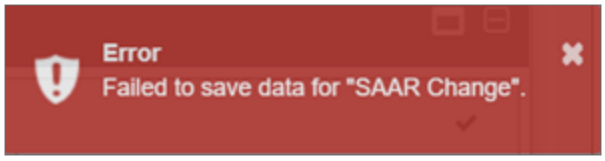
Automated validation tests typically check for three required entries:

- Has a Command value been selected (for those applications configured to require this selection)?
- Have Role and Permission values been selected?
- Has a SAAR been uploaded, has that form been certified, and has an expiration date up to one year in the future been entered?

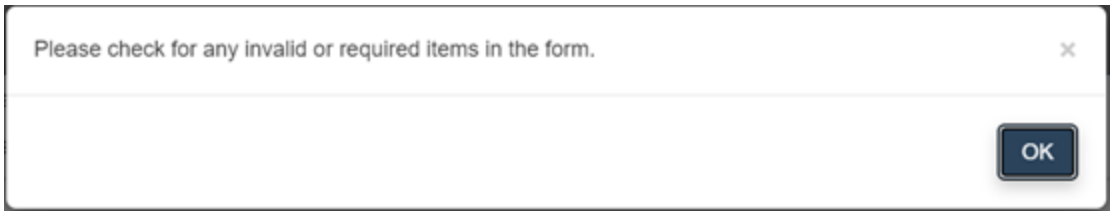
When validation tests are performed, a corresponding message appears:

- Red or green colored messages indicate whether the action was successful. Green messages indicate success, and automatically close after a few seconds. Red messages indicate that an issue was encountered and must be manually closed by clicking **Close** ✖.



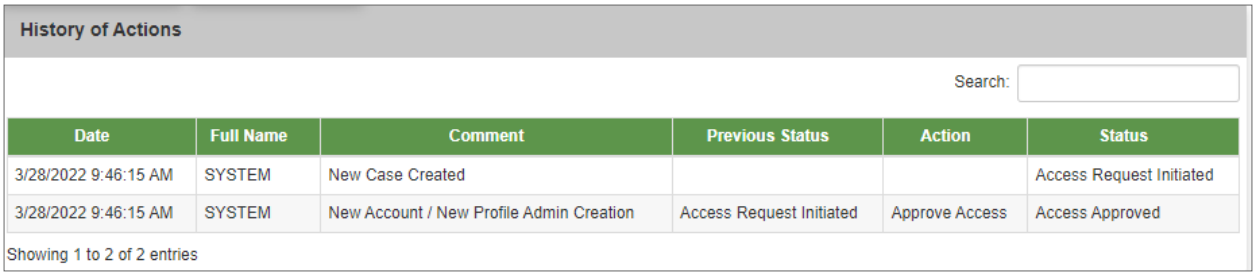


- Pop-up messages generally provide clearer explanations of what you must do to proceed with your action. An example is “Please check for any invalid or required items in the form.”



13.14.4.5 History of Actions

The *History of Actions* table within the *Submit* section displays all actions which have previously been taken on a user’s account, either by an Administrator or by automated processes. This section lists actions chronologically, with the most recent at the top. The *Search* box allows the user to search for a specific historical action if the number of actions makes finding one difficult.

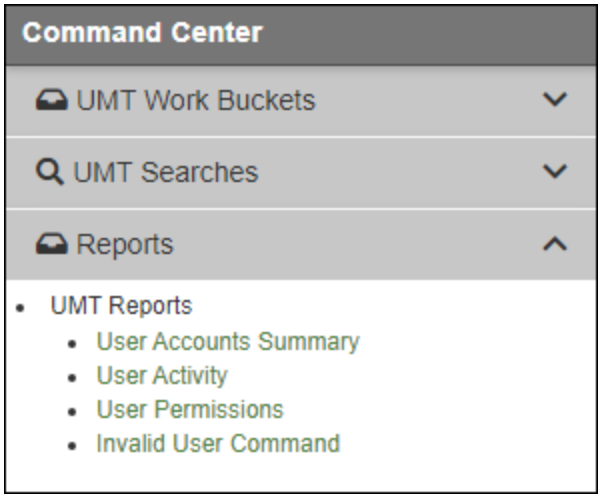


The table below lists each field displayed in the *History of Actions* section:

Field	Description
Date	The date and time the particular action was taken.
Full Name	The name of the individual or process that performed the action.
Comment	Remarks provided by the administrator or automated function that concern the action performed.
Previous Status	The state (or work bucket) the account was in prior to the action being performed.
Action	The event that caused a change in status.
Status	The state (or work bucket) the account is in after the completion of the action.

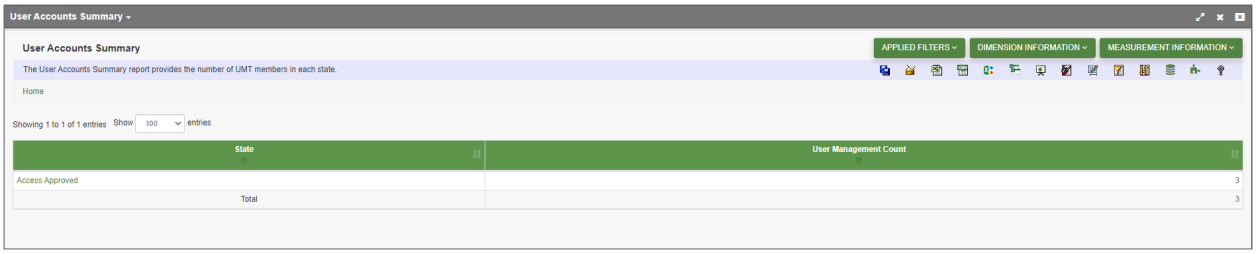
13.15 UMT Reports

Reporting is accessed via the *Reports* blade in the Command Center. Users can view the *User Accounts Summary*, *User Activity*, *User Permissions*, and *Invalid User Command* reports from there.



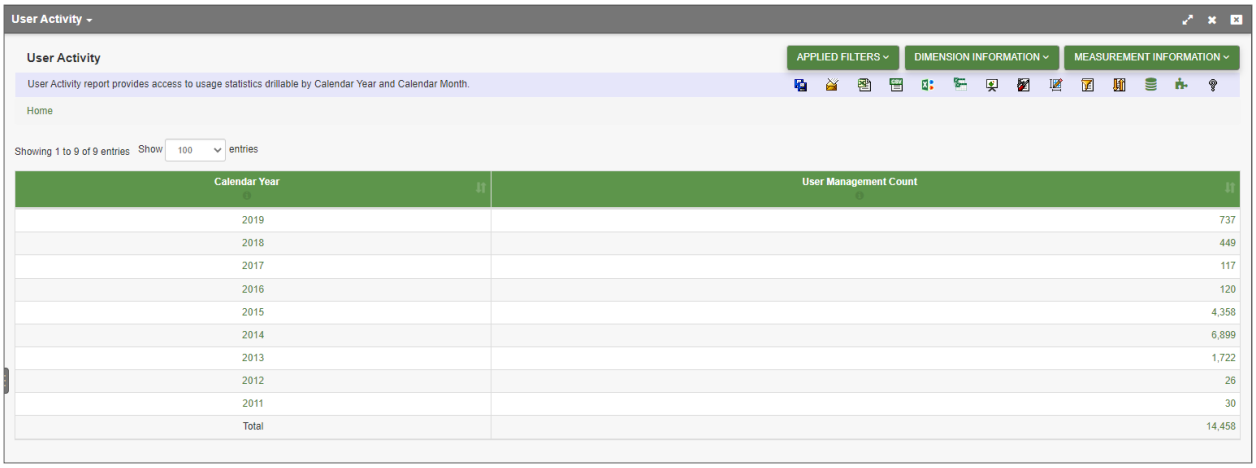
13.15.1 User Accounts Summary

This report provides the number of UMT members in each state.



13.15.2 User Activity

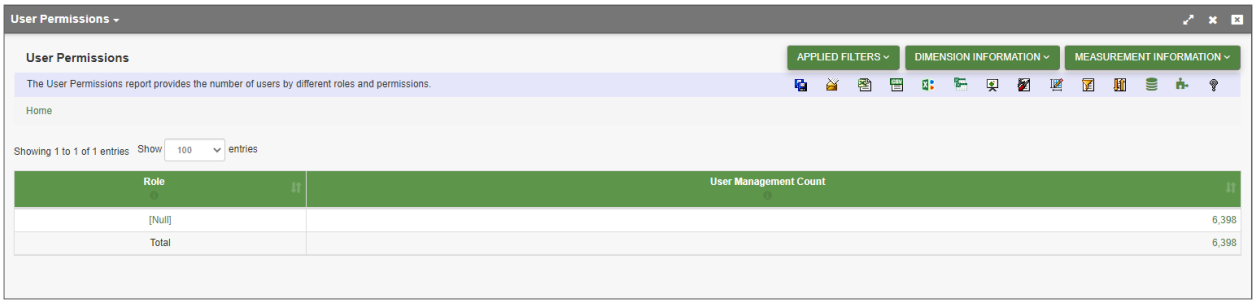
This report provides access to usage statistics drillable by Calendar Year and Calendar Month.



Calendar Year	User Management Count
2019	737
2018	449
2017	117
2016	120
2015	4,358
2014	6,899
2013	1,722
2012	26
2011	30
Total	14,458

13.15.3 User Permissions

This report provides the number of users by different roles and permissions.



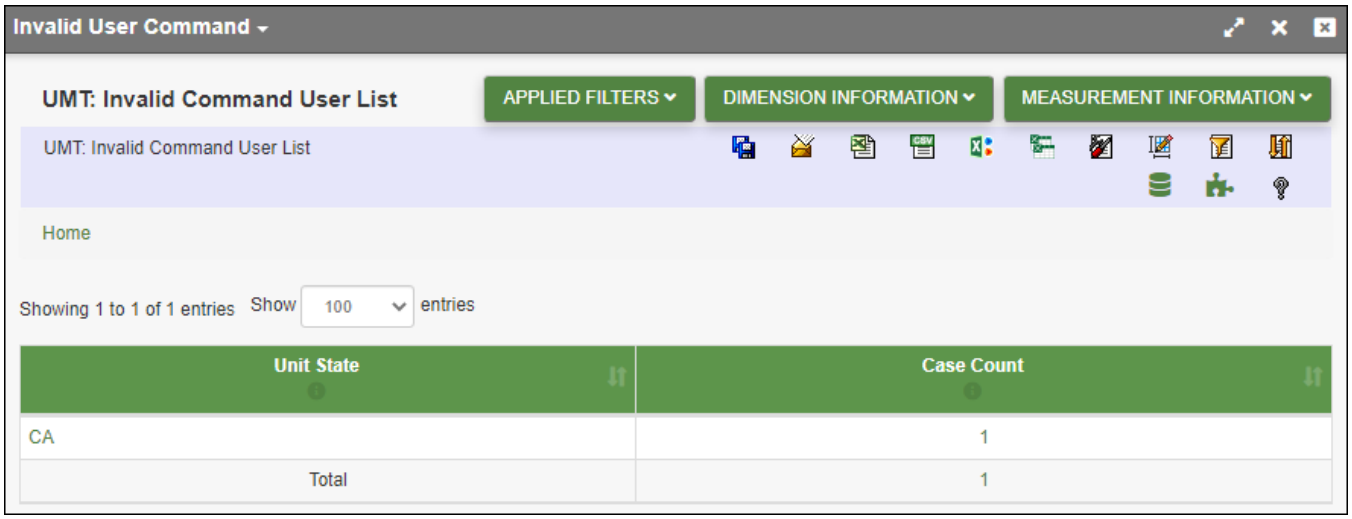
Role	User Management Count
[Null]	6,398
Total	6,398

13.15.4 Invalid User Command

This report identifies, for any module that requires a Command Hierarchy selection, those users whose Command Level/Command Value settings are no longer valid. These users will have problems using the module until these values are updated.

> *Example: BDE/XYZAA is now converted to BDE/ABCAA or DIV/XYZAA. The user's setting of BDE/XYZAA needs to be updated.*

This report helps identify these users.



13.16 Automatic Notifications

UMT provides both state-driven and time-driven notifications. Depending on the state or time, notifications are sent to either the User, Admin, or both, and may or may not include remarks entered by the User or Admin in the User Interface. In general, remarks that are "Required" fields are included in the emails.

The following chart summarizes by action who receives the notifications, whether the notification includes remarks, and whether the notification is driven by a state change or time-base event.

Action	Sent to User	Sent to Admin	Includes Remarks	State-Driven	Time-Driven
Access Requested	x			x	
Access Requested		x		x	
Access Request Canceled	x			x	
Access Approved	x			x	
Access Denied	x		x	x	
Access Extended (Revalidation Required)	x			x	
Access Extended (Revalidation Requested)	x			x	
Access Revoked	x		x	x	
Access Suspended (Administrator Action)	x		x	x	
Access Suspended (Unapproved Revalidation)	x		x	x	
Access Suspended (Non-Revalidation)	x		x		x
Access/Change Request Auto-Denied	x		x		x

Action	Sent to User	Sent to Admin	Includes Remarks	State-Driven	Time-Driven
Access/Change Request Auto-Denied		x	x		x
Change Approved	x			x	
Change Denied	x		x	x	
Change Requested	x			x	
Change Requested		x		x	
Non-Use Warning	x				x
Profile Command (Auto-Modified)	x				x
Reinstatement Requested	x				
Reinstatement Requested		x	x		
Reinstatement Approved	x			x	
Reinstatement Approved (Revalidation Required)	x			x	
Reinstatement Request Approved (Revalidation Required)	x			x	
Reinstatement Denied	x		x		
Revalidation Requested	x			x	
Revalidation Requested		x		x	
Revalidation Approved	x			x	
Revalidation Request Returned	x		x	x	
Revalidation Requested Warning	x				x
Revalidation Required	x				x
Revalidation Required (Warning)	x				x

13.16.1 State-Driven Notifications

State-driven notifications occur automatically when an action results in a change of the member's status (or state). State changes are typically associated with a change to the number of records that appear in a given work bucket. For example, as shown in the chart above, when a request for access is submitted and that member is moved into the *Access Requested* work bucket, both the user and Admin receive automated notifications.

13.16.2 Time-Based Notifications

Some notifications are driven by the passage of time, rather than a change in state. For example, after an extended period of non-use, the system sends a notification of account suspension if the application is not accessed within a predefined number of days.

The following chart lists that thresholds for time-based notifications:

Event	Event Description	Days
Access/Change Request	Number of consecutive days in an Access Requested state before approval is automatically denied	90
Warning for Non-Usage	Number of consecutive days of non-usage before being warning of a pending move into a Suspended state	90
Suspension for Non-Usage	Number of consecutive days of non-usage before being placed into a Suspended state	120
Revalidation Required (Entry)	Number of days prior to the SAAR expiration date that a case is moved into a Revalidation Required state	45
Revalidation Required (1st Warning)	Number of days prior to being Suspended while in Revalidation Required state that a 1st reminder email sent	15
Revalidation Required (2nd Warning)	Number of days prior to being Suspended while in Revalidation Required state that a 2nd reminder email sent	7
Revalidation Required Non-Action Warning	Number of days after being placed into a Revalidation Requested state that a reminder email of pending Suspension is sent	15
Extension (SAAR Expired)	Number of calendar days access can be extended by the Administrator if the SAAR expiration date has expired	30
Extension (SAAR Active)	Number of additional days of access that can be granted by the Administrator if the SAAR expiration date has not expired	30
Revocation after Reinstatement Request	Number of consecutive days allowed in a Reinstatement Request state before access is automatically Revoked	30
Revocation after Suspension	Number of consecutive days allowed in a Suspended state before access is automatically Revoked	30
Removal after Revocation	Number of consecutive days in a Revoked state before case is removed from all work-buckets	90