



The *Defense Organizational Climate Survey (DEOCS)* is a tool that provides commanders and other Department of Defense (DoD) leaders with important feedback about the current climate within their unit or organization. This guide provides survey administrators with instructions on accessing and registering a *DEOCS*.<sup>1</sup>

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<sup>1</sup> For more information about the roles different personnel assume for the *DEOCS*, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under *DEOCS*, Manage Users and Permissions, click on the document titled “User Roles and the DEOCS Process.”

## How to Register a New Survey in the DEOCS Portal

This section provides survey administrators with step-by-step instructions to register their DEOCS.<sup>2</sup>

### Enter DEOCS Request Details

To access the DEOCS Portal, follow these steps:

- **Step 1 – Log in to the DEOCS Portal** (<https://www.drcedirect.com/all/eca-portal-v2-ui/#/login/>). For best results, use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari.

- **Step 2 – Select “Create New Survey Request.”**

<sup>2</sup> This section will use information previously gathered by survey administrators in preparation for registration. To view a description of the information needed to register a DEOCS, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under DEOCS, Create a New DEOCS Request, open the document titled “Preparing to Register a DEOCS.”

- **Step 3 – If the roster for this DEOCS request is classified, click to view the special instructions for classified rosters.**
  - If the roster is not classified, skip to Step 5.

Survey Details
Participant List

To register your DEOCS, you must fill out all required fields and select the Register button located at the top of the page. Once you select Register, your survey will automatically be sent to your unit commander or organization leader who must review and approve the survey. After your commander or organization leader approves the survey, you will receive an email with further instructions. You can also select Save as Draft and return to fill out the remaining information at any time.

\* Indicates registration fields that must be completed in order to register your DEOCS.

If your roster is classified, please select the special instructions for classified rosters.

- **Step 4 – Review the instructions for classified rosters.**
  - If applicable to the unit or organization requesting the DEOCS, click the check box and then click “Confirm.”
  - If not applicable to the unit or organization requesting the DEOCS, click “Cancel.”

Classified Rosters
×

Per guidance from the Human Capital Management Office in the Office of the Under Secretary of Defense for Intelligence & Security, in most cases, unit rosters are not classified. Units in the Intelligence Community or other units with sensitive personnel assigned may use information found in the Defense Civilian Personnel Data System (DCPDS) and other DoD unclassified business systems to create DEOCS rosters.

If you have personnel in your unit whose identity is classified that are not in DCPDS or other DoD unclassified business systems, you may opt to administer a completely anonymous DEOCS by checking the box below. When you check this box:

- You will not be required to upload a roster.
- You have the option to indicate if you would like subgroups.
- You will indicate the number of people in your unit and each subgroup, if applicable.
- You will receive a single password for the entire unit, or each subgroup if applicable, that you will need to distribute.

By checking this box, I certify that my unit/organization's roster is classified and requires the legacy log-in method.

By selecting **Confirm**, any data or participants you might have already added for this survey

Cancel
Confirm

- **Step 5 – Enter the Registration Name.**

- The registration name defaults to the survey administrator’s last name and current date (example: “Smith 08.15.2023”). Users can also create a unique name for their *DEOCS*.
- The registration name will be saved in the *DEOCS* Registration Portal and will act as an identifier for this *DEOCS* administration.

Registration Name \*

DEOCS Team 04.20.2023

- **Step 6 – Select “Save as Draft.”**

- Survey administrators should save their registration regularly. Any work saved will remain available in the system if the user is either intentionally or accidentally logged out of the *DEOCS* Portal.

Survey Administrator: Alyssa McHoes  
Survey Commander: John Smith

Done Preview Survey Save as Draft Register

Survey Details Participant List

- **Step 7 – Upload *DEOCS* Participant Roster.**

- Click “Browse” underneath participant import and locate the roster or drag and drop the file into the space provided.
- All *DEOCS* requests require a roster of all individuals who are eligible to participate in the unit’s/organization’s *DEOCS*. This roster identifies all unit or organization participants that should receive a *DEOCS*.<sup>3</sup>

Participant Import \*

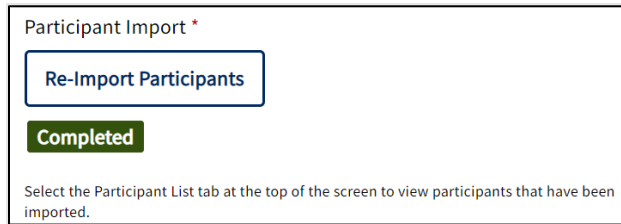
Browse

Select the Participant List tab at the top of the screen to view participants that have been imported.

<sup>3</sup> For more information about creating a roster for your *DEOCS*, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under *DEOCS*, Create a New *DEOCS* Request, click on the document titled “Preparing to Register a *DEOCS*.”

- **Step 8 – Select “Start Import” button.**

- If the roster did not contain any formatting errors, a green “Completed” message will be displayed underneath the “Participant Import” section.

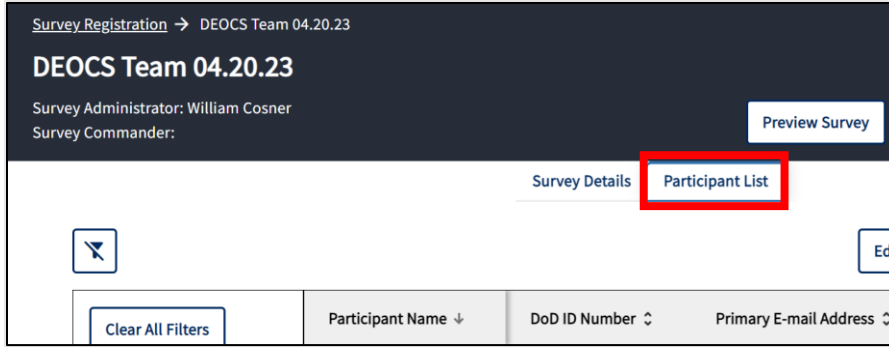


- If the roster import was unsuccessful, follow the instructions in the error message to correct the roster and re-upload. Common errors include:
  - **Duplicate DoD ID, e-mail address, or phone number.** Ensure that all participants have unique DoD IDs, e-mail addresses, or phone numbers.
  - **Missing DoD ID, e-mail address, or phone number.** Ensure that a DoD ID, e-mail address, or phone number is listed for each participant.
  - **Fewer than five participants per subgroup.** Ensure that each subgroup contains at least five participants.
  - **Missing participant name.** Ensure that all participants have both a first and last name assigned to the appropriate rows.
  - **Invalid e-mail address.** Ensure that the e-mail address is properly formatted and that there is not an extra space at the end of the address.
  - **Invalid header rows.** Ensure that each header row matches those in the roster template.<sup>4</sup>

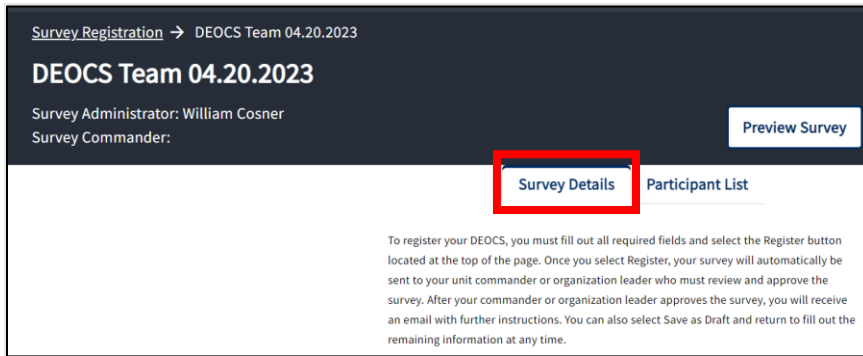
- **Step 9 – Select “Participant List” to verify the roster accuracy.**

- Once the roster import is successful, click on the “Participant List” tab to verify the information uploaded looks correct.
- For information on editing the Participant List, refer to the [Edit a DEOCS Request](#) section later in this document.

<sup>4</sup> To download the roster template, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under DEOCS, Create a New DEOCS Request, click on the document titled “Roster Template.”



- **Step 10 – Select “Survey Details.”**  
This will bring the user back to the survey registration page.



- **Step 11 – Select the Service Component.**
  - Select the unit’s/organization’s Service component from a drop-down menu that includes Joint Service, DoD, the Military Service Academies (MSA) and MSA Preparatory Schools, as well as active duty and Reserve options for the Army, Navy, Marine Corps, Air Force, Space Force, and Coast Guard.
  - This information is used to pull appropriate language and Service-specific questions into the DEOCS.

Service Component \*

Select

DoD

Joint Service

[ACTIVE DUTY] US Army (USA)

[ACTIVE DUTY] US Navy (USN)

[ACTIVE DUTY] US Marine Corps (USMC)

[ACTIVE DUTY] US Air Force (USAF)

[ACTIVE DUTY] US Space Force (USSF)

[ACTIVE DUTY] US Coast Guard (USCG)

National Guard (Army/Air/Joint)

[RESERVE] US Army Reserve (USAR)

- **Step 12 – Select the Command Level (if applicable).**
  - This drop-down menu will present a list of command structures specific to the Army, Navy, Marine Corps, Air Force, Space Force, and National Guard.
  - This information is used to help capture the structure and composition of units and organizations taking the *DEOCS*.

Command Level \*

Select

Army Group

Field Army

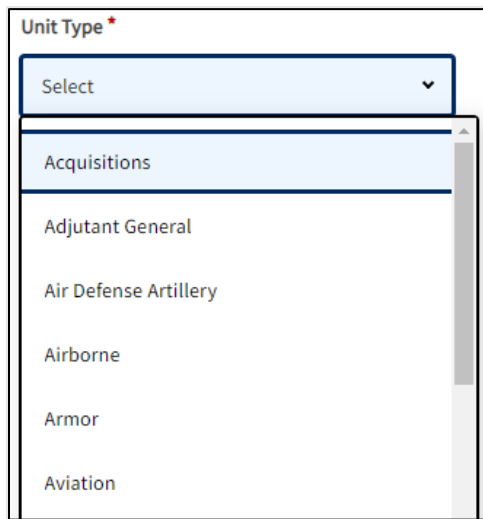
Corps

Division

Brigade

Battalion

- **Step 13 – Select the Unit Type (if applicable).**
  - This drop-down menu will present a list of unit types specific to each Service and will only be displayed for those who select DoD, Joint Service, Army, Navy, Marine Corps, Air Force, Space Force, and Coast Guard.
  - This information is used to help capture the structure and composition of units and organizations taking the *DEOCS*.



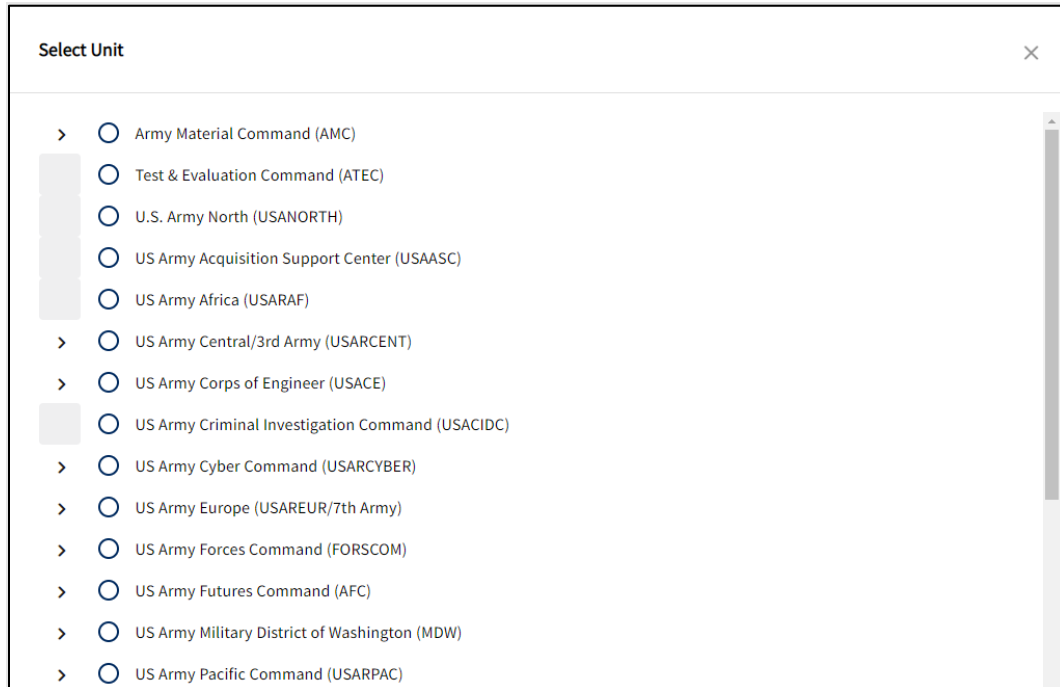
The image shows a screenshot of a web form field labeled "Unit Type \*". The field is a dropdown menu with a light blue border and a downward-pointing arrow on the right side. The current selection is "Select". Below the dropdown, a list of unit types is displayed, with "Acquisitions" highlighted in light blue. The other visible options are "Adjutant General", "Air Defense Artillery", "Airborne", "Armor", and "Aviation".

Unit Type
Select
Acquisitions
Adjutant General
Air Defense Artillery
Airborne
Armor
Aviation



• **Step 14 – Select the Unit (if applicable).**

- This pop-out menu will present a list of units specific to each Service, with the exceptions of MSAs and MSA Prep School.
- This information is used to help capture the structure and composition of units and organizations taking the *DEOCS*.



• **Step 15 – Enter the Unit/Organization Identification Code (Unit Identification Code (UIC), Reporting Identification Code (RUC), Personal Accounting Symbol (PAS), or Operational Facilities Code (OPFAC)).**

- UIC is for the Army, Navy, and the DoD.
- RUC for Marine Corps.
- PAS is for the Air Force and Space Force.
- OPFAC is for the Coast Guard.
- This information is used for trending *DEOCS* results over time and downloading past *DEOCS* results.

Unit/Organization Identification Code (UIC/RUC/PAS/OPFAC) \*

There are many ways in which units and organizations are identified. In this field, enter the UIC, RUC, PAS, or OPFAC code that identifies the level at which you are registering your unit or organization's DEOCS. Use the full 5- or 6-digit UIC code, 5-digit RUC, 8-digit PAS code, or 5-digit OPFAC code assigned to your unit or organization.

If needed, [more Service-specific instructions are available.](#)

- **Step 16 – Type the Installation, Base, Ship, or Location for the unit or organization.**
  - The searchable dropdown will display options as you type, and you can select an item once found. If the installation, base, ship, or location you are looking for is not on the list, you can manually add it by typing the full, official name directly into the field.
  - Include the name of the installation, base, ship, or location where the majority of the *DEOCS* participants work. For example, Fort Bragg, Pentagon, or Whiteman Air Force Base.
  - For National Guard, Reserve, or other (e.g., recruiting station) surveys where most survey participants are not located at a military installation, base, ship, or location, please search and select “Does not apply.”

**Installation/Base/Ship/Location \***

Use the searchable drop-down menu below to identify the installation, base, ship, or other location where the majority of your survey participants currently work. You can search by entering text into the field or view all options by clicking on the field and scrolling through the list. If your installation, base, ship, or location is **not** listed, manually add it by typing the full, official name directly into the field or select “Does not apply” if applicable. Do not use acronyms. For National Guard, Reserve, or other (e.g., recruiting stations) units/organizations where the majority of your survey participants are not located at a military installation or base please search and select “Does not apply”.

Click to view all or start typing to search ▼

- **Step 17 – Type the Unit’s or Organization’s Title.**
  - This field will be used throughout the *DEOCS* to keep participants oriented to thinking about their specific unit/organization, so ensure that this item is entered exactly as it should appear.
  - For example, a military unit that enters their Unit/Organization Title as “First Armored Division,” will be shown within the survey as follows: “Overall, how would you rate the current level of morale in your unit, First Armored Division?”

**Unit/Organization Title \***

Your unit or organization title will appear in your survey as entered here. For example, a military unit that enters their Unit/Organization Title as *ABC123*, will be shown within the *DEOCS* as follows: *Overall, how would you rate the current level of morale in your unit, ABC123?*

- **Step 18 – Enter the Unit’s or Organization’s City, State, and Zip Code.**
  - This information should reflect the location where the majority of the DEOCS participants work.

Unit/Organization City \*

Unit/Organization State \*

Unit/Organization Zip \*

- **Step 19 – Select the unit’s or organization’s deployment status.**
  - This field is only applicable for Army, Navy, Marine Corps, Air Force, Space Force, National Guard, and Coast Guard. Please select “No” if not applicable for your Service component or if your unit or organization is not deployed.

Is Your Unit Deployed? \*

Yes

No

- **Step 20 – Enter the Unit Commander’s or Leader’s Information for the unit or organization requesting a DEOCS and the date the commander or leader assumed command or their leadership role.**

### Commander/Leader’s Information

The unit commander or organizational leader name will appear in DEOCS documents (such as emails and the survey instrument), so please ensure the rank/title and name are written exactly as they should appear.

Service \*

Select ▼

First Name \*

Last Name \*


E-mail \*

Phone Number \*

Date Commander Assumed Command \*

Choose a date 

- **Step 21 – Enter the Unit Commander’s or Leader’s Supervisor’s Information for the unit or organization requesting a DEOCS.**

### Commander/Leader’s Supervisor's Information

The unit commander or organizational supervisor leader name will appear in emails, so please ensure the rank/title and name are written exactly as they should appear.

Service \*

First Name \*

Last Name \*

E-mail \*

Phone Number \*

- **Step 22 – Enter the Equal Opportunity Advisor’s (EOA) or Command Climate Specialist’s (CCS) Information for the unit or organization requesting a DEOCS.**
  - If the survey administrator is the EOA/CCS for the unit or if the unit does not have an EOA/CCS, click the check box.

### Equal Opportunity Advisor (EOA)/Command Climate Specialist (CCS) Information

If you are the EOA/CCS for this unit or this unit *does not* have an EOA/CCS, please click the box below. If you are not the EOA/CCS for this unit, please include the EOA/CCS's information below. This name will appear in emails, so please ensure the rank/title and name are written exactly as they should appear.

I am the EOA/CCS for this unit or this unit *does not* have an EOA/CCS

Service \*

First Name \*

Last Name \*

E-mail \*

Phone Number \*

- **Step 23 – Enter the Senior Non-Commissioned Officer’s (NCO) or Senior Enlisted Leader’s (SEL) information for the unit or organization requesting a DEOCS.**
  - If the unit or organization does not have a Senior NCO or SEL, click the check box.

### Senior Non-Commissioned Officer (NCO)/Senior Enlisted Leader's (SEL) Information

If this unit *does not* have a Senior Non-Commissioned Officer (NCO) or Senior Enlisted Leader (SEL), please click the box below. If your unit does have a Senior NCO/SEL, please include the Senior NCO/SEL's information below. This name may appear in your survey as entered here, so please ensure the rank/title and name are written exactly as they should appear.

This unit *does not* have a Senior NCO/SEL.

Service \*

First Name \*

Last Name \*

E-mail \*

Phone Number \*

- **Step 24 – Select the Start Date and End Date for the *DEOCS* in the “Survey Window” section.**
  - The annual fielding window for the *DEOCS* is from August 1<sup>st</sup> to November 30<sup>th</sup> and surveys must begin by October 31<sup>st</sup> per DoD Instruction 6400.11, DoD Integrated Primary prevention Policy for Prevention Workforce and Leaders. The start date will default to one week from the date the survey is being registered, but this date may be changed as needed.
  - When selecting a start date, ensure that adequate time is allowed for commander or leader review and approval of the survey request. The survey will not start until the commander or leader of the unit or organization has approved it. The commander or leader must approve the survey either from the e-mail they receive from the *DEOCS* system or by logging directly into the Portal.
  - The end date will default to four weeks from the start date, but this date may be changed as needed. Survey administrators can update the end date once a survey has started.
    - However, a survey cannot be re-opened once it has closed, so it is important to monitor response rates while the survey is still open and pro-actively extend the end date, if necessary.<sup>5</sup>
  - Start and end dates/times align with the North American Central Time Zone. Account for time differences when selecting start and end dates.

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<sup>5</sup> For more information about monitoring a survey in the field, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under *DEOCS*, *DEOCS* Promotion and Participation, click on the document titled “Monitoring Response Rates and Survey Outreach.”




### Survey Window


The annual fielding window for the DEOCS is between August 1st and November 30th, and the latest a DEOCS should start is October 31st. If the unit/organization is completing the survey outside of the annual fielding window, a justification must be provided below.

Additionally, the DEOCS start date and end date times are based on the North American Central Time Zone (CT). Therefore, due to differences in time zones, please allow additional time as needed when selecting start and end dates.

**Start Date \***  
The survey will become available at 12:01 A.M. Central Time.


08/01/2023 

**End Date \***  
The survey will close at 11:59 P.M. Central Time.

08/29/2023 

- **Step 25 – Select a reason for requesting a DEOCS outside of the annual fielding window.**
  - This field is displayed when the survey window start date falls outside of that of the official annual fielding window. Selecting “Other” will generate a write-in response box where you can enter justification for your survey request date falling outside of the annual fielding window.

Why is this DEOCS being conducted outside of the annual fielding window? \*

Select 

Due to deployment

Due to the unit/organization training schedule

Due to operational demands

Other

- **Step 26 – Enable or disable the Survey Window Automatic Extension.**
  - The DEOCS system has an automatic extension feature that, if selected during survey registration, will automatically extend the end date of the survey if the response rates are low. If you select this option, three days before your scheduled end date, if the response rate is less than 30% or fewer than 16 participants have taken the survey, the system will

automatically extend the survey end date by one week. This automatic extension can happen up to two times.

- To enable the automatic extension feature, leave the check box blank.
- To disable the automatic extension feature, click the “Automatic extension opt out” check box.
- The survey must field for at least 4 days to use the Survey Window Automatic Extension.

### Survey Window Automatic Extension

Automatic extension opt out

The system will monitor response rates for your survey. Three days before your scheduled end date, if your response rate is less than 30% or there are less than 16 participants, the system will automatically extend your survey end date by one week. This automatic extension will happen up to 2 times. Click here if you DO NOT want your survey to automatically extend. Please note you cannot reopen your survey once it closes.

- **Step 27 – Customize the DEOCS with closed-ended questions (LDQ) or open-ended questions (SAQ).**
  - Due to historical naming conventions, closed-ended questions are referred to as LDQs and open-ended questions are referred to as SAQs.
  - This optional step allows survey administrators to add additional questions to the *DEOCS*.<sup>6</sup> To customize the *DEOCS*, click “Add Custom Questions” and continue to Step 30. If you do not want to customize the *DEOCS*, skip to Step 37.
  - These are questions developed by the Office of People Analytics in accordance with stakeholders from the Service branches. Questions cover a wide variety of workplace and organizational climate topics.

### Customize the DEOCS

All survey participants will receive the base survey. If needed, additional questions may be added by the survey administrator.

Add Custom Questions

- **Step 28 – Click the “Create New List” button.**
  - If you have already created and saved a list of custom questions for this administration or a previous administration, it will be displayed in the example table below under “Question List Name.” To use an existing list,

<sup>6</sup> To view a full listing of the items available to add as custom questions, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under *DEOCS*, Create a New *DEOCS* Request, select the document titled “*DEOCS* Custom Question Bank.”

click the check box next to the list's name, click "Add List to Survey," and skip to Step 36.

Registration → Question Lists

### Customize the DEOCS

You can customize the DEOCS by choosing additional questions to ask. You can choose up to 10 multiple-choice format questions and 5 short-answer format questions. To create a new list of custom questions, click the "Create New List" button and choose questions from the bank. Your previously created lists will be displayed in the table below. Lists can be edited or deleted while in draft status. You can select a published list and assign it to your current DEOCS but it cannot be edited. Archived forms cannot be assigned to a new DEOCS. You can clone any question list. Click the list name to view or edit that list.

Search Question Lists  Status: Published ▾ Clear Go Back Create New List

- **Step 29 – Enter a Question List Name.**
  - Type in a name for the list to be created. It is recommended that an informative, descriptive name is used. Click “Save.” Question lists cannot be saved or added to a survey without a name.

Registration → Question Lists → Create New Question List

DEOCS Training List Draft

Total LDQ: 0 | Total SAQ: 0

Go Back Save Publish

Details LDQ List SAQ List

Edit Details

Question List Name \*

DEOCS Training List

- **Step 30 – Navigate to the LDQ List tab.**
  - Custom closed-ended questions can be added in this tab. To skip the addition of LDQs, skip to Step 33.

Registration → Question Lists → Create New Question List

DEOCS Training List Draft

Total LDQ: 0 | Total SAQ: 0

Go Back Save Publish

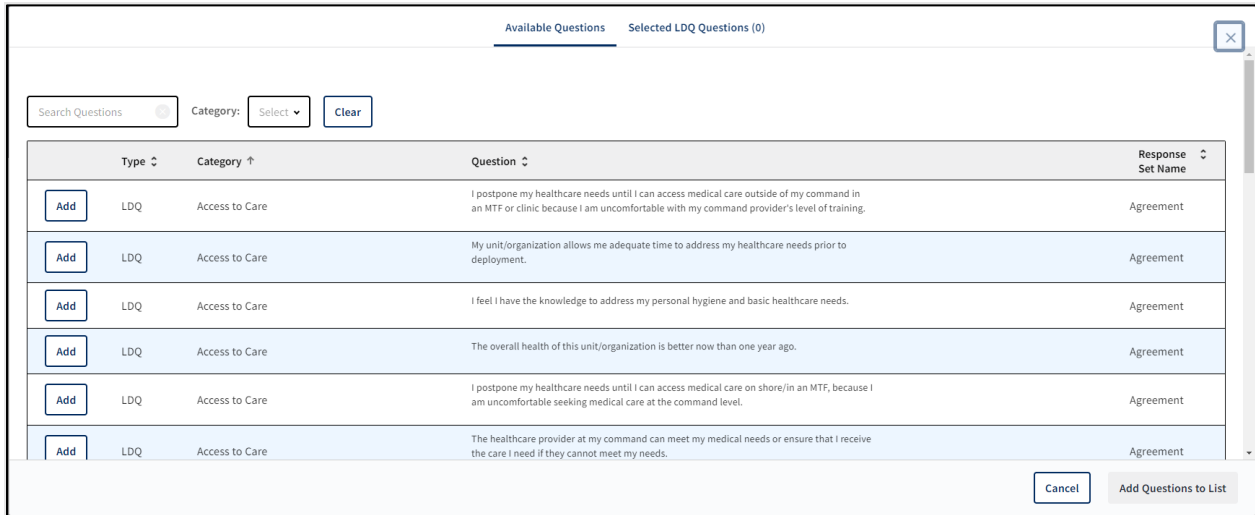
Details **LDQ List** SAQ List

Total LDQ Questions (0 / 10)

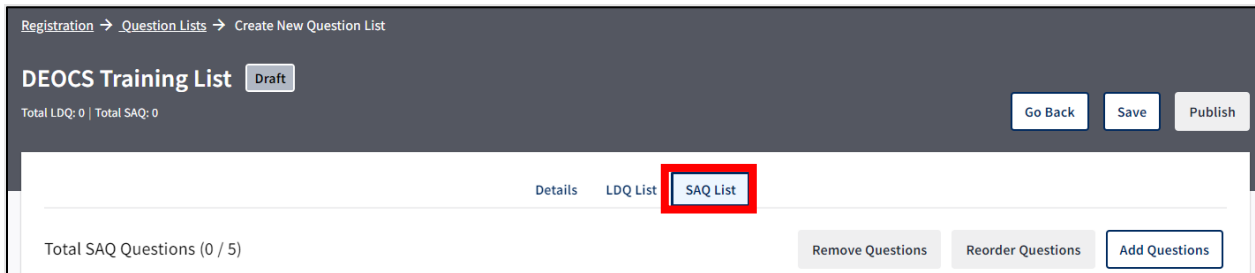
Remove Questions Reorder Questions Add Questions

- **Step 31 – Add closed-ended questions.**
  - Clicking the “Add Questions” button displays a pop-up menu with a list of LDQs.
    - Survey administrators may browse the questions by scrolling, search the questions by entering keywords into the “Search Questions” field, or filter the questions by category using the “Category” drop-down menu. You can clear any filters and searches by using the “Clear” button.
    - You can select up to ten LDQs by using the “Add” button to the left of each question. The number of LDQs currently selected will be displayed in the header next to “Selected LDQ Questions.” This header can be clicked on to view the selected questions.
    - You can remove LDQs by navigating to the “Selected LDQ Questions” tab and clicking the “Remove” button to left of each question.
    - Click “Add Questions to List” after selecting the desired LDQs.

- LDQs will be administered to DEOCS participants in exactly the order displayed here. To reorder their presentation, click “Reorder Questions” and use the arrow buttons or edit the number beside each question.
- If the maximum number of ten LDQs has been exceeded, a warning message will appear in red in the header and the list will not be able to be saved, published, or have additional questions added until the appropriate number of questions has been removed.

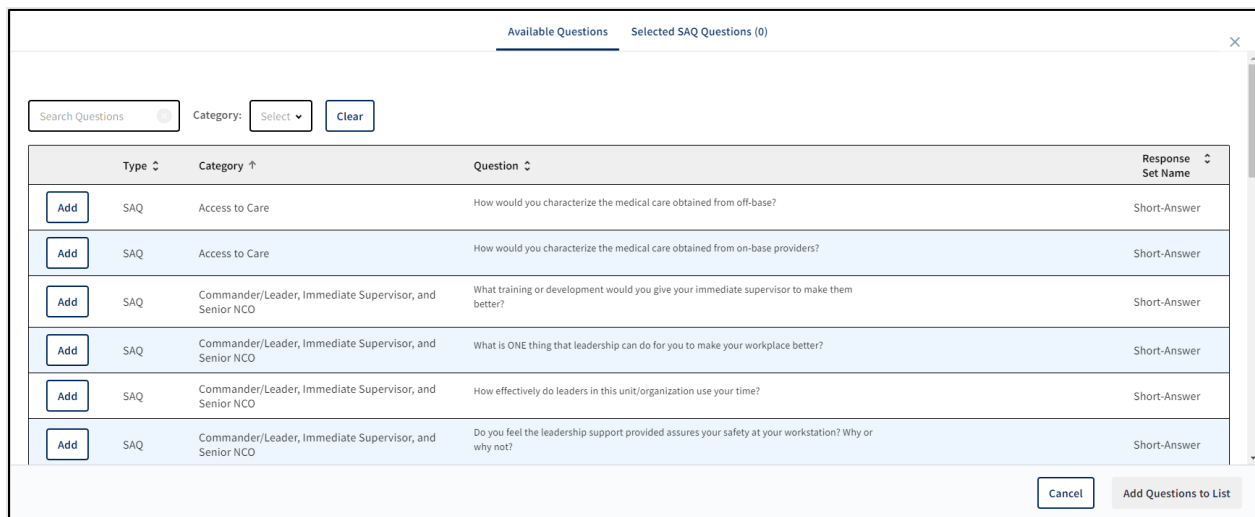


- **Step 32 – Navigate to the SAQ List tab.**
  - Custom open-ended questions can be added in this tab. To skip the addition of SAQs, skip to Step 35.



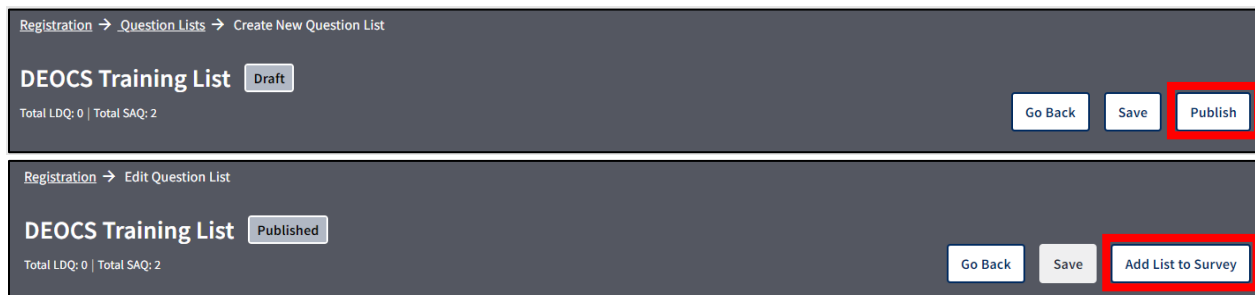
- **Step 33 – Add open-ended questions.**
  - Clicking “Add Questions” displays a pop-up menu with a list of SAQs.
    - Survey administrators may browse the questions by scrolling, search the questions by using keywords in the “Search Questions” field, or filter the questions by category using the “Category” drop-down menu. You can clear filters and searches by using the “Clear” button.

- You can select up to five SAQs by using the “Add” button to the left of each question.
- You can remove SAQs by navigating to the “Selected SAQ Questions” tab and clicking the “Remove” button to left of each question.
- Click “Add Questions to List” after selecting the desired SAQs.
- SAQs will be administered to *DEOCS* participants in exactly the order displayed here. To reorder their presentation, click “Reorder Questions” and use the arrow buttons or edit the number beside each question.
- If the maximum number of five SAQs has been exceeded, a warning message will appear in the header and the list will not be able to be saved, published, or have additional questions added until the appropriate number of questions has been removed.

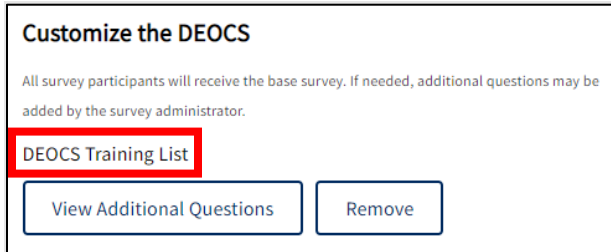


**Step 34 – Publish the list.**

- When finished adding custom questions, click “Publish” and then “Add List to Survey.” To save the list for inclusion at a later time without adding the list to the current registration, click “Save”. Custom question lists must be published before they can be added to a *DEOCS* registration.



- **Step 35 – Verify the Custom Question List was added to the survey.**
  - Scroll to the bottom of the *DEOCS* registration screen. The custom question list created at the end of Step 30 should be displayed directly above the “View Additional Questions” button. If the custom question list name is not displayed here, conduct Steps 30-36 once more.



- **Step 36 – Review the *DEOCS* registration for accuracy.**
  - Take a moment to review the registration, verifying that all information, including the participant list, is accurate.
- **Step 37 – Preview the survey questions.**
  - Click on the “Preview Survey” button to view what the *DEOCS* will look like for survey participants.



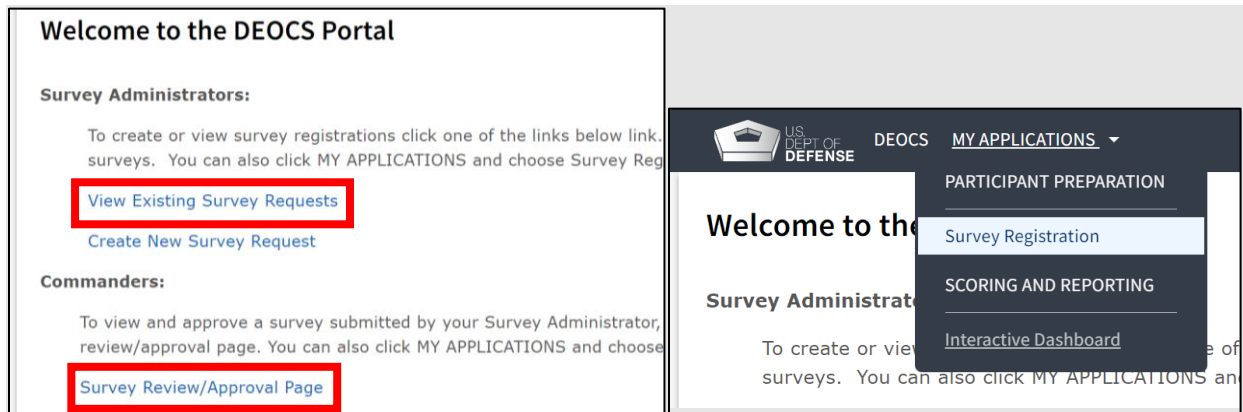
- **Step 38 – Register the *DEOCS*.**
  - Once the registration is finalized, click “Register.”



## View Current and Previous Survey Requests

The “Survey Registration” page allows survey administrators, commanders, leaders, and supervisors to view all current and previous survey requests under their purview. This section provides users with an overview of this page.

To access the “Survey Registration” page, from the home page, click “View Existing Survey Requests” if you are a survey administration, “Survey Review/Approval Page” if you are a commander or leader, or use the top menu bar and go to “My Applications > Survey Registration.”



Filters can be applied using the filter pane at left, allowing users to narrow their search by Service component, survey status, registration name, administrator, commander, and/or survey start and end dates. Users can also search by keyword. Clicking on a survey row opens the “Survey Details” page for that request. A new *DEOCS* request can also be created from this page by clicking “Create a new *DEOCS*.”

ROSTER IMPORT STATUS	DEOCS ID	REGISTRATION NAME	ADMINISTRATOR	COMMANDER	SURVEY WINDOW	PARTICIPANTS	SURVEY STATUS
Complete	5032dc01	Proxy Forced Anon 5032dc01	Hunter PEEBLES hpeebles@forsmarshgroup.gov	Peebles, Hunter	01/26/2022 to 02/23/2022	50	Approved
Complete	5bd5c863	Test	Hunter PEEBLES hpeebles@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	19	Ready for Approval
Complete	82df8cbe	Proxy Commander Test 2 82df8cbe	A MCHOES amchoes@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	20	Approved
Complete	9b290a6a	Proxy Admin Test 4	A MCHOES amchoes@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	17	Rejected
Complete	afde4920	Proxy Admin Test 3 afde4920	A MCHOES amchoes@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	18	Approved



## Edit a DEOCS Request

Depending on the status of the survey request, survey administrators can edit certain fields in the “Survey Details” tab (see table below). This section provides survey administrators with an overview of which information can be edited and when. To edit a DEOCS request survey administrators should follow these steps:

- **Step 1 – Navigate to the “View Existing Survey Requests” page.**
- **Step 2 – Locate the appropriate DEOCS.**
  - Using the filters at left, locate the DEOCS to be edited. Click anywhere on the DEOCS registration to be taken to the Survey Details page.
- **Step 3 – Use the table below to guide edits.**
  - The table describes which fields can be edited during each survey status type. Once finished, click the “Done” button to return to the main page and view other surveys if needed.

Survey Request Status	Editable Information
<b>Draft:</b> The survey request is being created or edited by the survey administrator.	<ul style="list-style-type: none"> <li>• Modify the roster by adding or removing participants, changing identifying information, or changing subgroup information.</li> <li>• Re-import a new roster.</li> <li>• Edit all fields on the “Survey Details” tab.</li> </ul>
<b>Ready for Approval:</b> The survey request has been submitted by the survey administrator and is waiting for approval or denial from the commander or leader.	<ul style="list-style-type: none"> <li>• Modify the roster by adding or removing participants, changing identifying information, or changing subgroup information.</li> <li>• Re-import a new roster.</li> <li>• Edit all fields on the “Survey Details” tab except Commander’s/Leader’s Information and Commander/Leader’s Supervisor’s Information.</li> </ul>
<b>Denied:</b> The survey request has been reviewed and denied by the commander or leader.	<ul style="list-style-type: none"> <li>• Modify the roster by adding or removing participants, changing identifying information, or changing subgroup information.</li> <li>• Re-import a new roster.</li> <li>• Edit all fields on the “Survey Details” tab except Commander’s/Leader’s Information and Commander/Leader’s Supervisor’s Information.</li> </ul>
<b>Approved and Not Started:</b> The survey request has been reviewed and approved by the commander or leader and the survey window is not open.	<ul style="list-style-type: none"> <li>• Modify the roster by adding or removing participants, changing identifying information, or changing subgroup information.</li> <li>• Edit the survey start date and end date.</li> </ul>

<p><b>Approved and Started:</b> The survey request has been reviewed and approved by the commander or leader and the survey window is open</p>	<ul style="list-style-type: none"> <li>• Add participants to the roster.</li> <li>• Edit the survey end date.</li> </ul>
<p><b>Completed:</b> The survey has closed.</p>	<ul style="list-style-type: none"> <li>• Edits may not be made to completed surveys.</li> </ul>

- **Step 4 – Make any necessary edits.**
  - Scroll to the appropriate location in the *DEOCS* registration make the required edits.
- **Step 5 – Click the “Done” button.**
  - You will return to the main page to view other surveys, if needed.

## Cancel a *DEOCS* Request

Survey administrators may cancel a *DEOCS* at any time **before the start date**. This section will provide an overview of when a *DEOCS* may be canceled, as well as step-by-step instructions for canceling a *DEOCS*.

### Survey Status and Cancellation

- **If a *DEOCS* is in “Ready for Approval” status:** A survey administrator can cancel the *DEOCS*. If the commander or leader tries to approve the survey without knowledge that it has been cancelled by the survey administrator, the commander or leader will receive a message saying the survey can no longer be approved because it was cancelled.
- **If a *DEOCS* is in “Approved” status:** A survey administrator can cancel the *DEOCS* any time before the start date. The “cancel survey” button will only appear before the start date has been reached.
- **If a *DEOCS* is in “Denied” status:** No action is needed to cancel the *DEOCS*. The survey will not start until it has been approved by the commander or leader.
- **If a *DEOCS* has already started:** A *DEOCS* that is already started cannot be cancelled, but a new end date can be selected to close a *DEOCS* early. To close a *DEOCS*, survey administrators can change the end date to today’s date in the Survey Details tab (noted in step 24). The survey system will continue to allow participants to take the survey until the end of the day and will then close out the survey.

### Steps to Cancel a DEOCS

- **Step 1 – Log in to the DEOCS Portal (<https://www.drcedirect.com/all/eca-portal-v2-ui/#/login/deocs>) and Select “Survey Registration.”**
  - This page can be accessed from two locations: in the main body of the page under “Survey Administrator” and in the top menu under “My Applications.”
  - For best results, use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari.
- **Step 2 – Locate the appropriate DEOCS.**
  - Using the filters at left, locate the DEOCS to be edited. Click anywhere on the DEOCS registration of interest. This will bring up the Survey Details page that contains all the registration information.

The screenshot shows the 'Survey Registration' page in the DEOCS portal. At the top, there is a search bar and a 'Create a new DEOCS' button. Below the search bar is a table with the following columns: ROSTER IMPORT STATUS, DEOCS ID, REGISTRATION NAME, ADMINISTRATOR, COMMANDER, SURVEY WINDOW, PARTICIPANTS, and SURVEY STATUS. On the left side of the table, there are several filter dropdown menus: 'Clear All Filters', 'Service Component', 'Survey Status', 'Registration Name', and 'Administrator'. The table contains six rows of registration data.

ROSTER IMPORT STATUS	DEOCS ID	REGISTRATION NAME	ADMINISTRATOR	COMMANDER	SURVEY WINDOW	PARTICIPANTS	SURVEY STATUS
Complete	5032dc01	Proxy Forced Anon 5032dc01	Hunter PEEBLES hpeebles@forsmarshgroup.gov	Peebles, Hunter	01/26/2022 to 02/23/2022	50	Approved
Complete	5bd5c863	Test	Hunter PEEBLES hpeebles@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	19	Ready for Approval
Complete	82df8cbe	Proxy Commander Test 2 82df8cbe	A MCHOES amchoes@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	20	Approved
Complete	9b290a6a	Proxy Admin Test 4	A MCHOES amchoes@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	17	Rejected
Complete	afde4920	Proxy Admin Test 3 afde4920	A MCHOES amchoes@forsmarshgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	18	Approved
Complete	ad12bcb5	Peebles 01.25.2022 ad12bcb5	Hunter Peebles peebhlhm@sewanee.edu	Peebles, Hunter	02/01/2022 to 03/01/2022	17	Approved

- **Step 3 – At the top right on the Survey Details page, click the “Cancel Survey” button and then “Submit.”**
  - The survey request will now be cancelled and cannot be reactivated.

The screenshot shows the 'Survey Details' page for 'Cosner 04.20.2023'. At the top, it says 'Survey Registration → Cosner 04.20.2023'. Below that, the survey administrator is listed as 'Willie Cosner' and the survey commander as 'William Cosner'. At the bottom right, there are three buttons: 'Done', 'Preview Survey', and 'Cancel Survey'. The 'Cancel Survey' button is highlighted with a red box.

## Next Steps after Registering a New Survey

This section provides a brief overview of the next steps in the *DEOCS* process and associated resources (in footnotes).

- After successfully registering a *DEOCS*, user accounts are automatically created for the commander or leader of the unit or organization and their supervisor. The commander or leader and their supervisor will also receive an automated e-mail letting them know about the request. The commander or leader will need to approve the *DEOCS* request before the survey can start.<sup>7</sup>
- Once the commander or leader has approved a survey request, the survey administrator will receive an e-mail with information and instructions on how potential participants can access the survey. If the commander or leader rejects the survey, the survey administrator will be sent an e-mail with the reason for the denial. The survey administrator can then edit any survey details as needed and resubmit it for approval.
- While the survey is in the field, it is important to monitor response rates and conduct survey outreach, if necessary.<sup>8</sup>
- When the survey closes, *DEOCS* results will be made available in the *DEOCS* Interactive Dashboard within two weeks. The survey administrator, commander or leader, and their supervisor will receive an e-mail notification when the results are ready.

## Contacting the *DEOCS* Help Desk

If you have questions or have any problems requesting a *DEOCS*, please contact our help desk at:

- [DEOCS@datarecognitioncorp.com](mailto:DEOCS@datarecognitioncorp.com)
- 1-833-867-5674

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<sup>7</sup> For more information about commander's and leader's roles during the *DEOCS*, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under *DEOCS*, Review/Approve a *DEOCS* Request, click on the document titled "Commander and Leader Roles in the *DEOCS* Process."

<sup>8</sup> For more information about monitoring response rates and survey outreach, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under *DEOCS*, *DEOCS* Promotion and Participation, click on the document titled "Monitoring Response Rates and Survey Outreach."