



The Defense Organizational Climate Survey (DEOCS) and Defense Organizational Climate Pulse (DOCP) are two survey tools that provide commanders and Department of Defense (DoD) leaders with important feedback about the current climate within their unit or organization. During survey registration, the survey administrator must upload a roster of all unit or organization members who are eligible to participate. This document provides an overview on creating a survey roster for a DEOCS or a DOCP.

Table of Contents

Creating a Roster	1
Next Steps.....	4
Contacting the Help Desk.....	5

Creating a Roster

This section provides step-by-step instructions for creating a survey roster.

Roster Requirements

Rosters must be created outside of the DEOCS and DOCP systems. The Office of People Analytics (OPA) recommends that survey administrators build their roster from the template on the Prevention.mil Survey Resource Center website.¹ It is also recommended that survey administrators regularly update roster files between survey administrations with changes to staffing or personnel contact information. Doing so will help to streamline subsequent survey administrations for the unit or organization.

Personnel

There must be at least 16 personnel included on the roster to register a DEOCS or DOCP. It is important to keep in mind that if fewer than 16 people respond to the survey, results will not be available in the DEOCS or DOCP systems. Only one roster may be uploaded per survey registration. The roster can be modified by adding or removing participants, changing identifying information, or changing subgroup information up until the survey start date. Once the survey starts, only additional participants can be added.

¹ To view a DEOCS roster template, 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 “Roster Template.”

The roster must contain the first and last name of each member and at least one additional piece of information—i.e., DoD ID or primary or secondary e-mail address (preferably .mil for their primary address). If a phone number is included, either DoD ID or an e-mail address must also be provided. Providing as much information as you have for each unit/organization member will aid in a smoother login process for participants. Additional information about these fields is provided below:

- **First Name (required).**
- **Last Name (required).**
- **DoD ID.** The unique 10-digit number associated with each member. This is an optional field if an e-mail is already provided. For individuals that do not have an e-mail address, include their DoD ID.
- **Primary E-mail Address.** It is preferable to use an individual's .mil, .gov, or .edu e-mail, but you may also use a personal e-mail if a valid work e-mail is not available. Do not use group, listserv, or distribution list e-mails that are not specific to a participant.
- **Secondary E-mail Address.** It is preferable to use an individual's .mil, .gov, or .edu e-mail, but you may also use a personal e-mail if a valid work e-mail is not available. Do not use group, listserv, or distribution list e-mails. It is not required to enter a secondary e-mail address.
- **Mobile Phone Number.** An entered phone number must be at least 7-digits. You are not required to enter a phone number for any individuals on the roster. If phone number is included, DoD ID or an e-mail address must also be listed.
- **Subgroup Name (if subgroup breakouts are desired).** If you would like your DEOCS or DOCP reports to include subgroup breakouts beyond demographics, use this column to identify which subgroup individual participants belong to. For example, if you choose to group by organizational function (i.e., department, division) within a command, the subgroup names entered would be the title of each relevant section within the unit linked to each rostered member. A roster can have up to 50 different subgroups. Each subgroup must have at least five individuals take the survey for *factor scores* to be reported broken out by that subgroup, and at least 16 participants for *comments* broken out by that subgroup. If you do not wish to designate subgroups for your survey, simply leave this column blank. The same participant cannot be included in multiple subgroups, and it is not possible to have nested subgroups (e.g., organizational function subgroups within subgroups based on company/squadron information). Subgroups should not be used to identify demographic groups (such as females), as DEOCS and DOCP results will automatically be broken out by demographic groups (e.g., race/Hispanic origin, sex, rank/paygrade).

Formatting

Make sure the column headings in row 1 of your roster are formatted and ordered exactly as shown in the image below and as in the template.² If they are not, you will receive an error message when trying to upload the roster in the DEOCS or DOCP system. For example, if the fifth column header is “Secondary Email” instead of “Secondary E-mail Address” you will not be able to successfully upload the roster.

Example of a roster with correct column headings:



	A	B	C	D	E	F	G
1	First Name	Last Name	DoD ID Number	Primary E-mail Address	Secondary E-mail Address	Mobile Phone Number	Subgroup Name
2	John	Smith	1234567890	JohnSmith@mail.mil	JohnSmith@email.com	123-456-7890	Subunit A
3	Jane	Doe	1234567891	JaneDoe@mail.mil	JaneDoe@email.com	123-456-7891	Subunit B
4	Anna	Miller	1234567892				Subunit B
5	Matt	Johnson		MattJohnson@mail.mil			Subunit A
6	Maria	Garcia	1234567893			123-456-7892	Subunit A
7	Olivia	Carter	1234567894	OliviaCarter@mail.mil			Subunit B
8	Blake	Lee		BlakeLee@mail.mil	BlakeLee@email.com		Subunit B

Example of a roster with incorrect column headings:



	A	B	C	D	E	F	G
1	First Name	Last Name	DoD ID Number	Primary E-mail Address	Secondary Email	Mobile Phone Number	Subgroup Name
2	John	Smith	1234567890	JohnSmith@mail.mil	JohnSmith@email.com	123-456-7890	Subunit A
3	Jane	Doe	1234567891	JaneDoe@mail.mil	JaneDoe@email.com	123-456-7891	Subunit B
4	Anna	Miller	1234567892				Subunit B
5	Matt	Johnson		MattJohnson@mail.mil			Subunit A
6	Maria	Garcia	1234567893			123-456-7892	Subunit A
7	Olivia	Carter	1234567894	OliviaCarter@mail.mil			Subunit B
8	Blake	Lee		BlakeLee@mail.mil	BlakeLee@email.com		Subunit B

File Type

The roster must be a CSV file. You will not be able to upload an Excel document (.xlsx, .xls), text file (.txt), or other type of file. If your roster is an Excel or text file, click “File” and “Save as.” After selecting where you would like to save your file and the file name, in the file type drop-down menu, choose “CSV (Comma delimited) (*.csv).”

CSV (Comma delimited) (*.csv)

Unsupported

Roster Limitations

The OPA Defense Climate Portal (DCP) allows you to upload a roster with **up to 12,000 individuals**. If your unit/organization has more than 12,000 individuals, you will need to create multiple registrations. When planning how to divide individuals into multiple registrations, keep in mind that you will only receive one overall report per registration

² To view a DEOCS roster template, 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 “Roster Template.”

and one report for each subgroup in a registration. With recent updates to the “Response Rates and Reports” section of the DEOCS System, users can combine DEOCS reports they have access to. Overall survey reports for units and organizations cannot currently be combined for the DOCP. For more information on creating combined DEOCS reports, review the instructions in the “Combined Results” tab in the DEOCS Response Rates and Reports section of the DEOCS System. For assistance with setting up multiple survey registrations, contact the help desk at DEOCS@datarecognitioncorp.com or 1-833-867-5674.

Who to Include

The roster should contain all Service members, DoD civilians, and foreign nationals (with the exception of those specified in the following section) in the unit or organization administering the DEOCS or DOCP. It is important that the roster is as complete and accurate as possible as it will affect the accuracy of your results.

Who to Exclude

Per DoD policy, your roster should not include DoD contractors or any non-Service members under the age of 18 (Service members of all ages, however, should be included). In addition, do not include the commander or leader or the commander’s or leader’s supervisor in the roster.

Next Steps

After creating your survey roster and gathering the information needed to register a DEOCS or DOCP, you may need to register for an OPA DCP account. Go to the link below to register for an account and begin the process of registering your survey.³

- To register for an OPA Defense Climate Portal account, navigate to <https://www.drceirect.com/all/eca-user-management-ui/#/registration/deocs>, input the requested information, and then click “Register”⁴
- If you already have an OPA Defense Climate Portal account, navigate to <https://www.drceirect.com/all/eca-portal-v2-ui/#/login/DEOCS> and sign in with your username and password.

³ For details on how 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, click the document or video titled “How to Register a DEOCS.”

⁴ For step-by-step instructions on registering for an OPA DCP account, navigate to <https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/> and under DEOCS, Create a New DEOCS Request, click the document titled “How to Request an OPA DCP Account.”

Contacting the Help Desk

If you have questions or any problems while registering a DEOCS or DOCP, please contact our help desk at:

- OPA_DCP@datarecognitioncorp.com
- 1-833-867-5674