The Defense Organizational Climate Survey (DEOCS) and the Defense Organizational Climate Pulse (DOCP) are two survey tools that provide commanders and other Department of Defense (DoD) leaders with important feedback about the current climate within their unit or organization. This document describes each DEOCS and DOCP user role including associated capabilities/privileges. It also provides instructions for transferring a DEOCS or DOCP administration from one user to another and for designating a proxy for a specific DEOCS or DOCP administration.

Table of Contents

DEOCS and DOCP User Roles

This section outlines DEOCS and DOCP user roles and their responsibilities.

Registration User Roles

Every DEOCS or DOCP administration involves four roles: (1) the survey administrator, (2) the unit's/organization's commander or leader, (3) the unit commander's or leader's supervisor, and (4) the survey participant. Expectations and/or responsibilities of each are outlined below.

Survey Administrator

Survey administrators play a critical role in the survey process. For a new DEOCS or DOCP to be launched, a survey administrator must first create and register it.[1] While a survey is open, the survey administrator is responsible for monitoring the survey's response rate, keeping the requesting unit/organization commander/leader informed of the survey's progress, and extending the survey end date as needed.[2]

After a survey has closed, the survey administrator should work with their commander/leader and any other CCA leaders to interpret the results of the survey and identify next steps. This may include additional information gathering efforts (i.e., sensing sessions, interviews, the collection of observational data, or the review of archival records) to further contextualize the survey findings. Additionally, the survey administrator works with the commander or leader who initiated the survey request to develop and execute a Comprehensive Integrated Primary Prevention (CIPP) Plan to improve the command climate of the unit or organization.[3]

Unit/Organization Commander or Leader

Commanders and leaders should work closely with survey administrators throughout the DEOCS or DOCP process. Before the survey begins, commanders and leaders must review the previous DEOCS and assess progress in implementing action items from the CIPP Plan. It is the commander's or leader's responsibility to review and approve or deny a survey that is newly registered by a survey administrator. Granting approval indicates that the commander or leader provides consent for the survey administration to begin, whereas the denial option affords the commander or leader the opportunity to further discuss or make additional adjustments to the survey prior to its launch.[4]

While a survey is open, the commander or leader should work closely with the survey administrator to ensure that the survey is being effectively marketed to all members of

---

[1] For an overview of the information required for the DOCP registration, navigate to https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/ and under DOCP, Create a New DOCP Registration, click on the document titled "Registering a DOCP Training Video." For an overview of the information required for a DEOCS registration, navigate to the above website and under DEOCS, click on the document titled "Preparing to Register a DEOCS."

[2] For an overview of how to monitor response rates and conduct DEOCS/DOCP 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."

[3] For more information about steps to take after a DEOCS/DOCP has closed, navigate to https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/ and view the documents under Viewing DEOCS Reports, Interpreting DEOCS Results, Briefing DEOCS Results, and Interpreting DOCP Results.

[4] For an overview of a commander's or leader's role in the DEOCS registration process, 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."

the unit or organization. This may require additional outreach to encourage participation, such as a survey kickoff events, daily announcements, and e-mail outreach.[5]

After a DEOCS or DOCP survey has closed, the commander or leader should work with the survey administrator to interpret and conduct additional information gathering efforts (i.e., focus groups, interviews) to further contextualize the survey findings. The commander or leader is also responsible for briefing their supervisor on the survey results, working with the survey administrator and Integrated Primary Prevention Workforce (IPPW) personnel to develop or update a CIPP Plan, and executing the CIPP Plan to improve the unit's or organization's command climate.[6]

Unit/Organization Commander's or Leader's Supervisor

Commanders' and leaders' supervisors should provide oversight and mentorship throughout the survey process; however, specific actions are not required of them. A supervisor will receive notifications when a DEOCS or DOCP survey has been registered and when its results are ready to be viewed in the Office of People Analytics Defense Climate Portal (OPA DCP). The requesting commander or leader will brief their supervisor on the survey results from their unit or organization once they have worked with the survey administrator to interpret and validate the results. Commanders and leaders are expected to keep their supervisors informed throughout the CCA.

Additional User Roles

There are four additional roles that users may hold within the OPA DCP: IPPW personnel, Equal Opportunity Advisor (EOA)/Command Climate Specialist (CCS), Service Administrator, and Service Manager. These types of users do not have a formal role in the survey process, although they may act as survey administrators, unit commanders and leaders, or commander and leader supervisors, if needed. This section will outline these user roles.

Integrated Primary Prevention Workforce

The IPPW personnel should provide oversight over survey administration. Once survey results are received by the command, the IPPW personnel should analyze and interpret the results with the command and update action items and progress on the CIPP Plan accordingly. For the DOCP survey, the IPPW listed on the registration will have access to the DOCP registration and any results reports. For DEOCS, the IPPW will have to be

---

[5] For an overview of how commanders and leaders can conduct 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".

[6] For more information about steps to take after a DEOCS or DOCP has closed, navigate to https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/ and view the documents under Viewing DEOCS Reports, Interpreting DEOCS Results, Briefing DEOCS Results, and Interpreting DOCP Results.

added as a proxy survey administrator to gain access to the results. For more information on designating a proxy, review the "Designating a Proxy for a DEOCS or DOCP Registration" section later in this document.

Equal Opportunity Advisor/Command Climate Specialist

The EOA/CCS personnel listed on the survey registration will have a user account created for them if they do not already have one. This will allow the EOAs/CCSs to view the survey registration, monitor the survey while it is in the field, and download results. If an EOA/CCS wants access to previous survey results, they will need to be added as a proxy survey administrator for any registration they wish to view. See the "Designating a Proxy for a DEOCS or DOCP Registration" section below for steps to assign a proxy user to a registration.

Service Administrator

Service Administrators act as Service-wide OPA DCP users and can view results for any previous or ongoing surveys and edit registrations within their Service component that are available on the OPA DCP. A Service Administrator can also create new OPA DCP users within their Service component, as well as assign new roles and permissions to existing users within their Service component.[7] A Service Administrator might also be a survey administrator, a commander or leader, or a commander's or leader's supervisor.

Service User

The role of Service Users is similar to that of Service Administrators; however, Service Users may only view survey registrations and results within their Service component. Unlike Service Administrators, Service Users may not create new users or assign new roles to existing users within the OPA DCP.[8] Like Service Administrators, though, a Service User might also be a survey administrator, a commander or leader, or a commander's or leader's supervisor.

---

[7] For an overview of user management processes, 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 "DEOCS User Management."

[8] For an overview of user management processes, 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 "DEOCS User Management."

Transferring a DEOCS or DOCP Registration

When survey administrators, commanders or leaders, or their supervisors transfer posts or duty locations, they may wish to reference past survey results to gain a better understanding of any challenges facing their new unit or organization. The OPA DCP allows Service Administrators to transfer a survey registration from one user to another. This functionality grants access to the prior DEOCS or DOCP surveys to the incoming personnel and revokes access from the outgoing personnel. This section provides a step-by-step overview of the process involved for Service Administrators to transfer a survey registration.

- **Step 1 – Log in to the OPA Defense Climate Portal (www.drcedirect.com/all/eca-portal-v2-ui/#/login/DEOCS).**
  - For the best results, use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Safari. Internet Explorer is not a supported browser at this time.
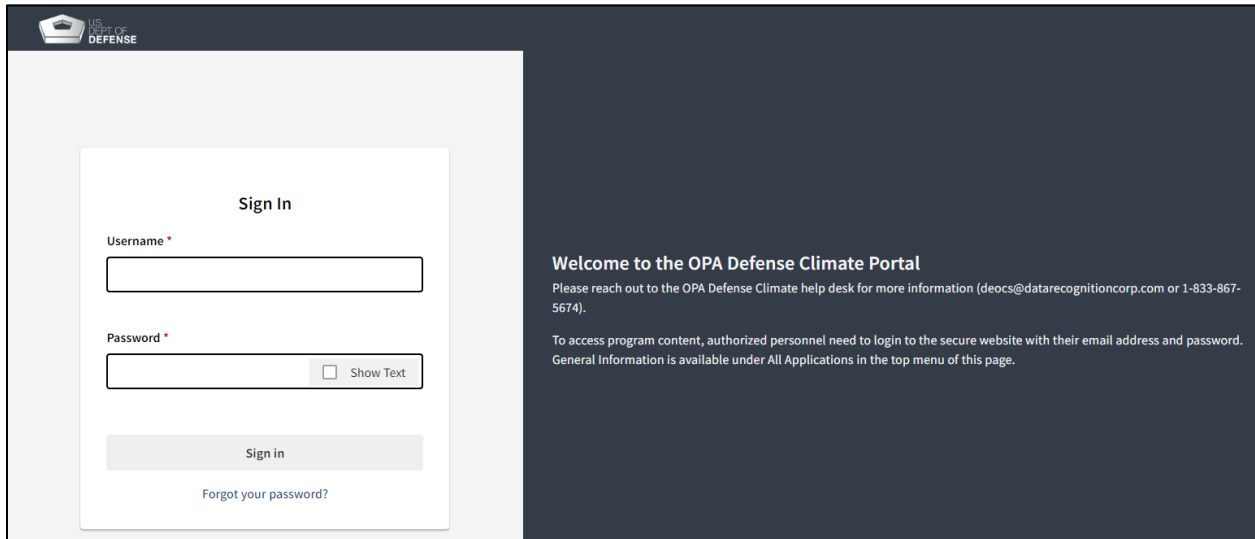
- **Step 2 – Navigate to the appropriate System page.**
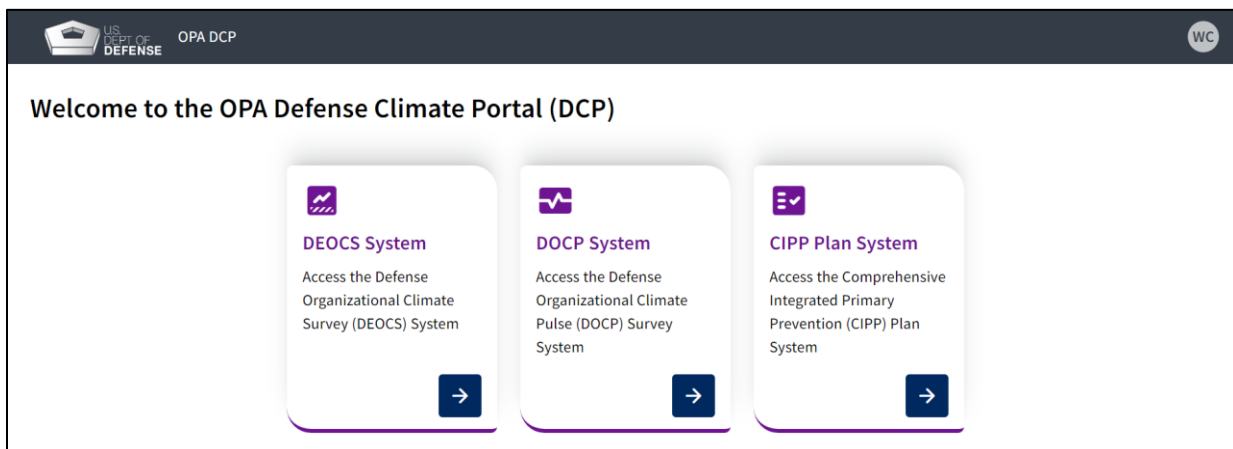
- **Step 3a – For DEOCS, select "View Existing DEOCS Requests."**

Welcome to the DEOCS System

View Existing DEOCS Requests

Create a New DEOCS Registration

Review/Approve a DEOCS Request

View Response Rates and Reports

- **Step 3b – For DOCP, select "View Existing DOCP Requests."**

Welcome to the DOCP

View Existing DOCP Requests

Create a New DOCP Request

Review/Approve a DOCP Request

View DOCP Reporting Dashboard
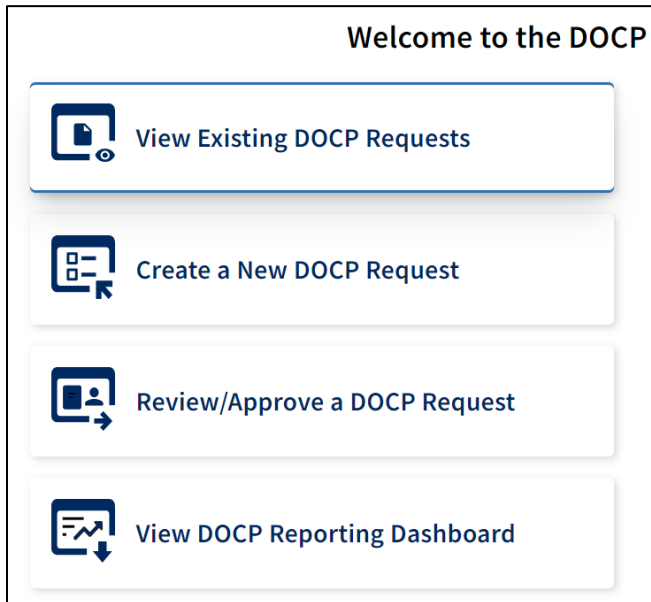
- **Step 4 – A list of available surveys will be shown in the middle of the screen. Click anywhere on the survey to be transferred.**
  - This will lead to a new page with more information about the survey**.**

- **Step 5a – For DEOCS, navigate to the "Responsibility Management" tab**.

- **Step 5b – For DOCP, navigate to the "Leadership Information" section and click on the "Manage User Access" tab.**

- **Step 6 – Click on the corresponding tab to select the type of user (survey administrator, commander/leader, or supervisor) associated with the selected survey to be changed.**

Survey Administrator's Information

First Name
William

Last Name
Cosner

E-mail
william.p.cosner.ctr@mail.mil

[**Change Administrator**]

Survey Administrator Proxies

- Dwayne Beebe - dwayne.d.beebe.ctr@mail.mil

Commander/Leader's Information

Commander/Leader's Supervisor's Information

- **Step 7 – Click "Change Administrator," "Change Commander/Leader" or "Change Commander/Leader Supervisor," as appropriate.**

- **Step 8 – Locate the new survey administrator, commander/leader, or commander's/leader's supervisor using the "User Selection" pop-up window. Click "Select" on the new personnel.**
  - The "User Selection" screen allows for search by name or e-mail address.

User Selection ☒

Name	E-mail	Select
test test	test@test1.mil	Select
Test Test	Test.mil@mail.mil	Select
Test Test	test1.mil@mail.mil	Select
Test Test	test.1.civ@mail.mil	Select
Testing Test	Test123@mail.mil	Select
Test Testerson	test.testerson@mail.mil	Select
test guy	Test@mail.mil	Select

- **Step 9 – Review the "Responsibility Management" tab to ensure that the newly assigned individual is displayed in the appropriate user role.**

Survey Administrator's Information
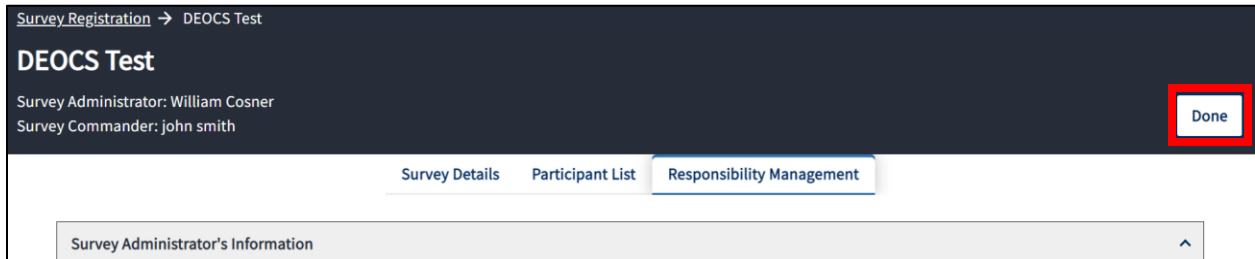
First Name
Joe

Last Name
Smith

E-mail
jsmith@mail.mil

Change Administrator

Survey Administrator Proxies

- Dwayne Beebe - dwayne.d.beebe.ctr@mail.mil

Commander/Leader's Information

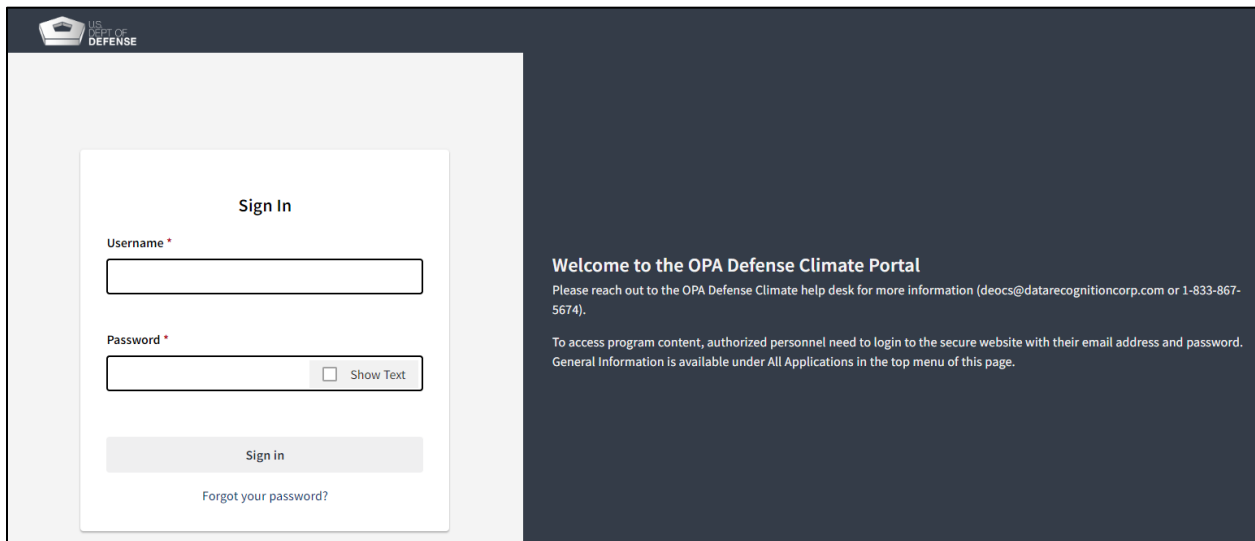**Commander/Leader's Supervisor's Information**

- **Step 10 – At the top of the page, click the "Done" button.**
  - o The new user will immediately have the appropriate level of access to the transferred survey.
  - o Note that the original user will immediately lose their access to the survey.
  - o Surveys must be transferred individually—that is, on a survey-by-survey basis.

Survey Registration → DEOCS Test

DEOCS Test

Survey Administrator: William Cosner
Survey Commander: john smith

Done

Survey Details   Participant List   **Responsibility Management**

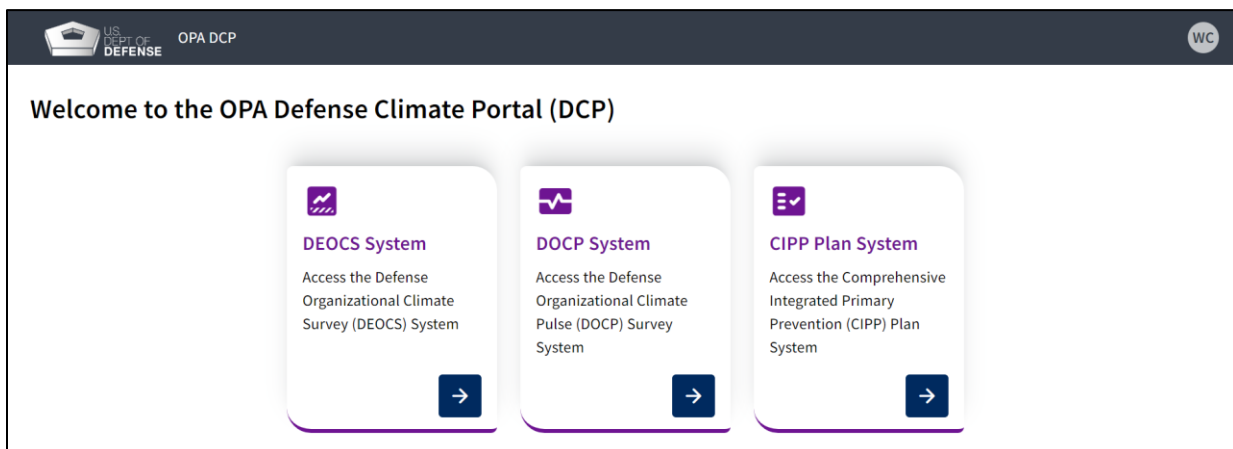Survey Administrator's Information   ∧

Designating a Proxy for a DEOCS or DOCP Registration

Incoming commanders or leaders must have the ability to review the previous commander's or leader's surveys and assess the progress of the CIPP Plan. Some units and organizations conduct DEOCS and DOCP administrations as a team, with multiple survey administrators, EOAs/CCSs, or commanders/leaders involved in a single survey. In these cases, it is beneficial for these users to be able to manage or otherwise access a survey registration and subsequent results. This section will provide step-by-step instructions for survey administrators, and commanders/leaders to designate proxies for their registrations, allowing up to three proxies (four users, total) per role to access a given registration.
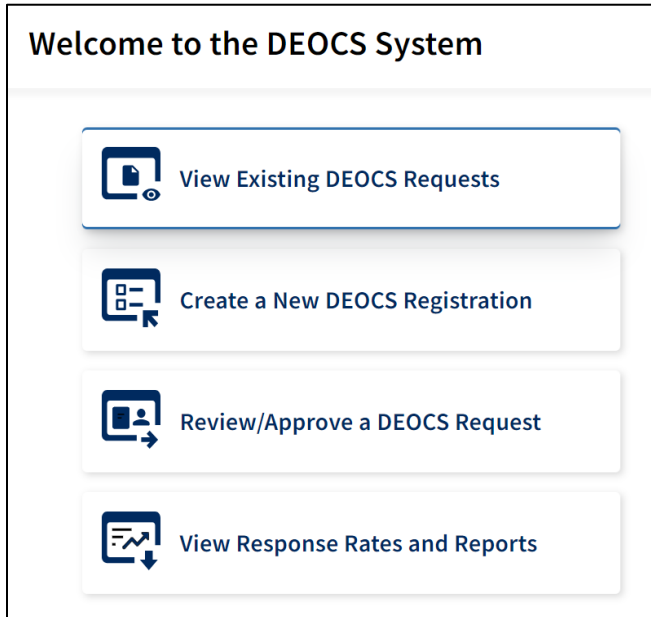
- **Step 1 – Log in to the OPA Defense Climate Portal (www.drcedirect.com/all/eca-portal-v2-ui/#/login/DEOCS).** For the best results, use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari.
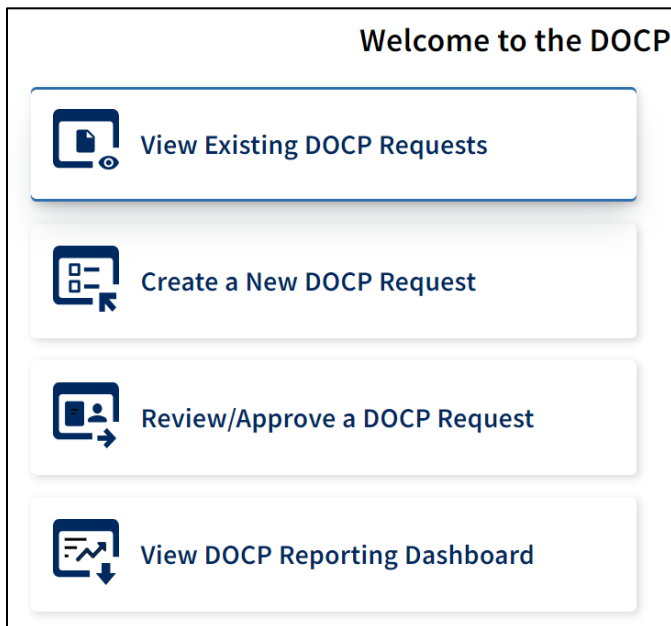

- **Step 2 – Navigate to the appropriate System page.**

- **Step 3a – For DEOCS, select "View Existing DEOCS Requests."**

Welcome to the DEOCS System

- View Existing DEOCS Requests
- Create a New DEOCS Registration
- Review/Approve a DEOCS Request
- View Response Rates and Reports

- **Step 3b – For DOCP, select "View Existing DOCP Requests."**

Welcome to the DOCP

- View Existing DOCP Requests
- Create a New DOCP Request
- Review/Approve a DOCP Request
- View DOCP Reporting Dashboard

- **Step 4 – A list of available surveys will be shown in the middle of the screen. Click anywhere on the survey that requires a proxy.**
  - Clicking here will lead to a new page with more information about the survey.

- **Step 5a – For DEOCS, navigate to the "Responsibility Management" tab.**

- **Step 5b – For DOCP, navigate to the "Leadership Information" section and click on the "Manage User Access" tab.**

- **Step 6 – Click on the corresponding tab to add proxies for either the survey administrator or commander/leader roles.**
    - Up to three proxies may be designated for each role.
    - Users may only designate proxies for their role. For example, a survey administrator may only designate survey administrator proxies, not commander/leader proxies.
    - If a user is adding an EOA/CCS as a proxy to registrations prior to December 2022, add them as a survey administrator.
    - Proxies for commander's/leader's supervisors may not be designated.

- **Step 7 – Click "Add Proxy" under the appropriate tab.**

Survey Administrator's Information

First Name
William

Last Name
Cosner

E-mail
william.p.cosner.ctr@mail.mil

Survey Administrator Proxies

Designate up to three proxies in the event the above is absent

No proxies have been added.

Add Proxy

Commander/Leader's Information

Commander/Leader's Supervisor's Information

- **Step 8 – Using the "User Selection" pop-up window, type in the full e-mail address associated with the proxy's OPA DCP account. Click "Select" on the user's account.**
  - If the user has an account, their account will appear in the search results.
  - If the user does not have an account, they will need to create one before they can be designated as a proxy.[9]

- **Step 9 – Review the "Responsibility Management" tab to ensure that the new proxy is displayed in the appropriate user role.**

---

[9] For instructions for creating an OPA Defense Climate Portal account, navigate to https://www.prevention.mil/Climate-Portal/Defense-Climate-Portal-Survey-Resource-Center/ and under DEOCS, click on the document titled "How to Request a DEOCS Portal Account."

- **Step 10 – At the top of the page, click the "Done" button.**
  - o The new proxy user will now receive all new system e-mails associated with this survey.
  - o Note that both the original survey administrator, commander/leader, and the proxy survey administrator or commander/leader will have the same access to the survey.

Survey Registration → DEOCS Test

DEOCS Test

Survey Administrator: William Cosner
Survey Commander: john smith

Done

Survey Details   Participant List   **Responsibility Management**

Survey Administrator's Information   ⌃
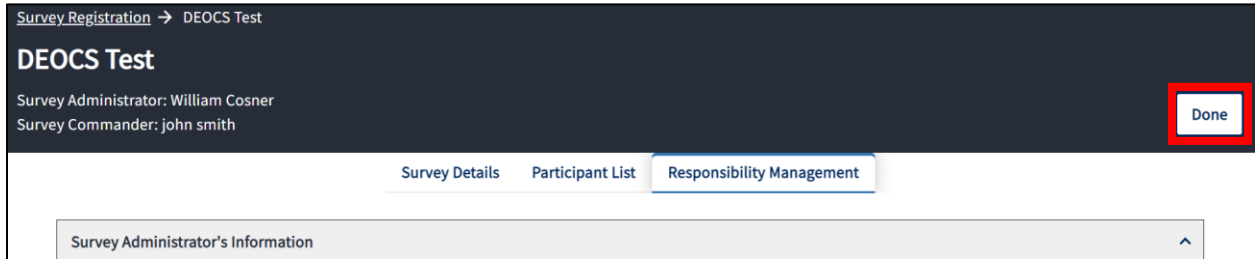
Contacting the Help Desk

If you have questions or any problems designating a proxy or transferring a DEOCS or DOCP survey, please contact our help desk at:

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