



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. The *DEOCS* Portal was designed with all potential user roles in mind. This document describes each role and its capabilities/privileges. It also provides instructions for transferring a *DEOCS* from one user to another and for designating a proxy for a specific *DEOCS* administration.

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DEOCS User Roles

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

Registration & Reporting User Roles

Every *DEOCS* 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. The expectations and/or responsibilities of each are outlined below.

Survey Administrator

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

After a *DEOCS* has closed, the survey administrator should work with their commander, leader, and any other command action team leaders to interpret the results of the survey and identify next steps. This includes additional information gathering efforts (i.e., focus groups, interviews, the collection of observational data, or the review of archival records) to further contextualize the *DEOCS* findings. Additionally, the survey administrator works with the commander or leader who initiated the *DEOCS* request to develop and execute a Comprehensive Integrated Primary Prevention (CIPP) plan to improve the climate of the unit or organization.

Unit/Organization Commander or Leader

Commanders and leaders should work closely with survey administrators throughout the *DEOCS* process. Before the survey begins, incoming commanders and leaders must review the previous *DEOCS* and assess progress in implementing action items from the CIPP plan. For an incoming commander or leader to be granted access to a previous *DEOCS*, they must be added as a proxy user. See the "[Designating a Proxy for a DEOCS Registration](#)" section later in this document for more information. It is the commander's or leader's responsibility to review and approve or deny a *DEOCS* that is newly registered by a survey administrator. Granting approval indicates that the commander or leader provides consent for the survey administrator to distribute the

¹ For an overview of the information required for the *DEOCS* Registration Portal, click [here](#), and under step 1, "Prepare," click on the document titled "Preparing to Register a DEOCS."

² For an overview of how to monitor response rates and conduct *DEOCS* outreach, click [here](#), and under step 2, "Conduct," click on the document titled "Monitoring Response Rates and Survey Outreach."

survey, 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.³

While a *DEOCS* 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 the unit or organization. This may require additional outreach to encourage participation, such as a *DEOCS* kickoff event, daily announcements, and e-mail outreach.⁴

After a *DEOCS* has closed, the commander or leader should work with the survey administrator to interpret and, if needed, conduct additional information gathering efforts (i.e., focus groups, interviews) to further contextualize the *DEOCS* findings. The commander or leader is also responsible for briefing their supervisor on the results of the survey and working with the survey administrator to develop and execute a CIPP plan to improve the climate of the unit or organization.⁵

Unit/Organization Commander's or Leader's Supervisor

Commanders' or leaders' supervisors should provide oversight and mentorship throughout the *DEOCS* process, however, specific actions are not required of them. A supervisor will receive notifications when a *DEOCS* has been registered and when its results are ready to be viewed in the Interactive Dashboard. The requesting commander or leader will brief their supervisor on the *DEOCS* results from their unit or organization once they have worked with the survey administrator to interpret the results. Commanders and leaders are expected to keep their supervisors informed throughout the *DEOCS* process.

Survey Participant

Survey participants do not have access to the *DEOCS* Portal. They are designated on the roster that the survey administrator creates prior to registering a *DEOCS* and access the survey by following a link that is automatically e-mailed to them through the *DEOCS* system. They log in to the survey by using either their e-mail address, phone number, or DoD ID—whichever information was provided on the roster.⁶

³ For an overview of a commander's or leader's role in the registration process, click [here](#), and under step 1, "Prepare," click on the document titled "Commander and Leader Roles in the DEOCS Process."

⁴ For an overview of how commanders and leaders can conduct *DEOCS* outreach, click [here](#), and under step 2, "Conduct," click on the document titled "Monitoring Response Rates and Survey Outreach."

⁵ For more information about steps to take after a *DEOCS* has closed, click [here](#), and view the documents under step 3, "Interpret," step 4, "Develop," and step 5, "Execute."

⁶ For information that can be used to help participants who are having trouble accessing the survey, click [here](#), and under step 2, "Conduct," click on the document titled "Participant FAQ."

Additional User Roles

There are three additional roles that users may hold within the *DEOCS* Portal: Equal Opportunity Advisor/Command Climate Specialist, Service administrator, and Service manager. These types of users do not have a formal role in the *DEOCS* 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.

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

As of December 2022, on new *DEOCS* registrations, if applicable, the EOA/CCS listed on the registration will have a user account created for them. This will allow the EOA/CCS to view the *DEOCS* registration, monitor the survey while it is in the field, and download results in the Interactive Dashboard. If an EOA/CCS wants access to previous *DEOCS* results, they will need to be added as a proxy survey administrator for any *DEOCS* registration they wish to view. See the “[Designating a Proxy for a DEOCS Registration](#)” section later in this document for steps to assign a proxy user to a registration.

Service Administrator

Service administrators act as Service-wide *DEOCS* Portal users and are able to view the registration and results for any past or current *DEOCS* within their Service component that is available on the Portal. A Service administrator can also create new Portal 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 unit/organization 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 *DEOCS* registrations and results from their own command and subordinate units that fall under their administrative control. For example, one Army Service user may oversee the *DEOCS* administrations in the First Army, whereas another oversees the *DEOCS* administrations for the Eighth Army. Unlike Service administrators, Service users may not create new Portal users or assign new roles to existing users.⁸ Like Service administrators, though, a Service user might also be survey administrator, unit/organization commander or leader, or a commander’s or leader’s supervisor.

⁷ For an overview of user management processes, click [here](#), and under step 1, “Prepare,” click on the document titled “DEOCS User Management.”

⁸ For an overview of user management processes, click [here](#), and under step 1, “Prepare,” click on the document titled “DEOCS User Management.”

Transferring a *DEOCS* Registration

When survey administrators, commanders or leaders, or their supervisors transfer posts or duty locations, they may wish to reference past *DEOCS* results to gain a better understanding of any issues facing their new unit or organization. The *DEOCS* Portal allows Service administrators to transfer a *DEOCS* registration from one user to another. This functionality grants access to the prior *DEOCS* to the incoming individual and revokes access from the outgoing user. Not all user roles have the permission to transfer a *DEOCS* registration. This section provides a step-by-step overview of the process involved for Service administrators to transfer a *DEOCS* registration.

- **Step 1 – Log in to the DEOCS Portal** (www.drcedirect.com/all/eca-portal-v2-ui/#/login/deocs).
 - Please use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Internet Explorer is not a supported browser at this time.

- **Step 2 – Click on the “View Existing Survey Requests” page.**

- **Step 3 – A list of available surveys will be shown in the middle of the screen. Click anywhere on the survey to be transferred.**
 - Clicking here will lead to a new page with more information about the survey.

Role: Other

Survey Registration

Search Showing all available results 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@forsmar shgroup.gov	Peebles, Hunter	01/26/2022 to 02/23/2022	50	Approved
Complete	5bd5c863	Test	Hunter PEEBLES hpeebles@forsmar shgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	19	Ready for Approval
Complete	82df8cbe	Proxy Commander Test 2 82df8cbe	A MCHOES amchoes@forsmar shgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	20	Approved
Complete	9b290a6a	Proxy Admin Test 4	A MCHOES amchoes@forsmar shgroup.gov	Peebles, Hunter	02/01/2022 to 03/01/2022	17	Rejected

- **Step 4 – Navigate to the “Responsibility Management” tab at the top.**

DEOCS Test

Survey Administrator: William Cosner
Survey Commander: john smith

Done

Survey Details Participant List **Responsibility Management**

Survey Administrator's Information

- **Step 5 – Click on the corresponding tab to select the type of user (survey administrator, commander/leader, or supervisor) associated with the selected DEOCS to be changed.**

Survey Details Participant List **Responsibility Management**

Survey Administrator's Information

Commander/Leader's Information

Commander/Leader's Supervisor's Information

- **Step 6 – Click “Change Administrator,” “Change Commander/Leader” or “Change Commander/Leader Supervisor,” as appropriate.**

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 – 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 user.**
 - The “User Selection” screen allows for search by name or e-mail address.

User Selection

test

×

Q

Name	E-mail	Select
test test	test@test1.mil	Select
Test Test	Test.mil@mail.mil	Select
Test Test	test1.mil@mail.mil	Select

- **Step 8 – Review the “Responsibility Management” tab to ensure that the new user 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 9 – At the top of the page, click the “Done” button.**
 - The new user will immediately have the appropriate level of access to the survey transferred.
 - Note that the original user will immediately lose their access to the survey.
 - *DEOCS* 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* Registration

Incoming commanders or leaders must review the previous commander's or leader's *DEOCS* and assess the progress in implementing action items. Along with this requirement, some units and organizations conduct *DEOCS* administrations as a team, with multiple survey administrators, EOAs/CCSSs, commanders, or leaders involved in a single *DEOCS*. In these cases, it is beneficial for these users to be able to manage or otherwise access a *DEOCS* registration and subsequent results. This section will provide step-by-step instructions for survey administrators, commanders, and leaders to designate proxies for their registrations, allowing up to three proxies (four users, total) per role to access a given registration. Keep in mind that a user can only designate a proxy for the role they are assigned on a specific *DEOCS*. For example, a survey administrator can only designate a proxy survey administrator.

- **Step 1 – Log in to the DEOCS Portal (<http://www.drcdirect.com/all/eca-portal-v2-ui/#/login/deocs>).**
 - Please use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Internet Explorer is not a supported browser at this time.

Sign In

Username *

Password *

☐ Show Text

Sign in

[Forgot your password?](#)

Welcome to the DEOCS Portal

Please reach out to the DEOCS help desk for more information (deocs@datarecognitioncorp.com or 1-833-867-5674)

To access program content, authorized personnel need to login to the secure website with their email address and password. General information is available under All Applications in the top menu of this page.

ATTENTION: Due to system maintenance, the download reporting capabilities of this system will be unavailable on 4/21/23 starting at 11:30pm CT. This outage is expected to last through 6:00am on 4/22/23. All other system functionality will be available during this time.

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- **Step 2 – Click on the “View Existing Survey Requests” page.**

Welcome to the DEOCS Portal

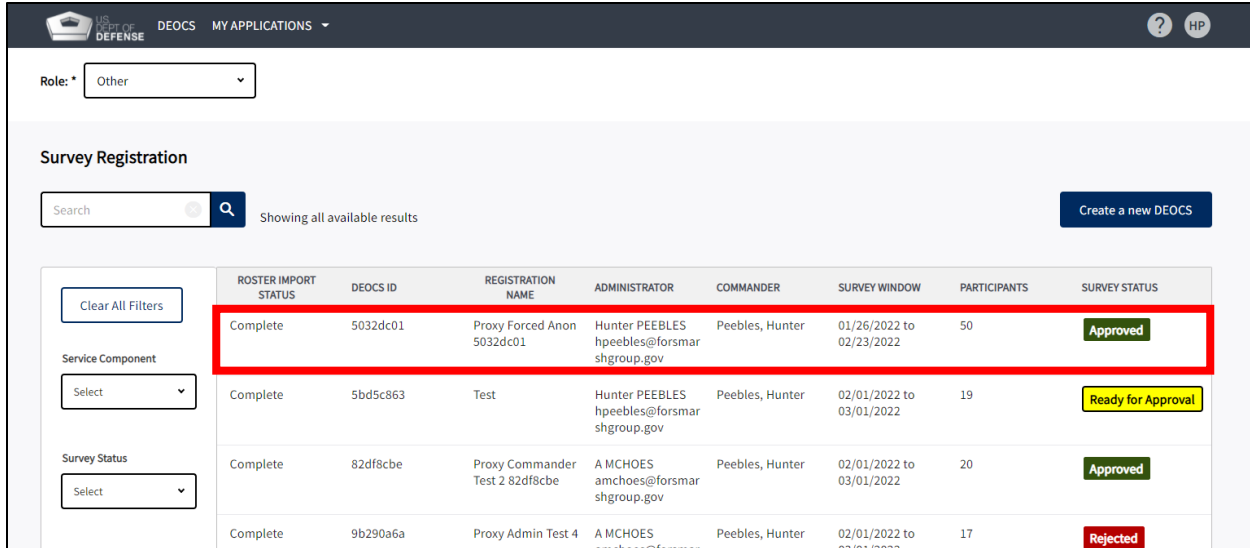
Survey Administrators:

To create or view survey registrations click one of the links below link. They will take you to a screen where you can create and manage your surveys. You can also click MY APPLICATIONS and choose Survey Registration under the Participant Preparation Menu.

[View Existing Survey Requests](#)

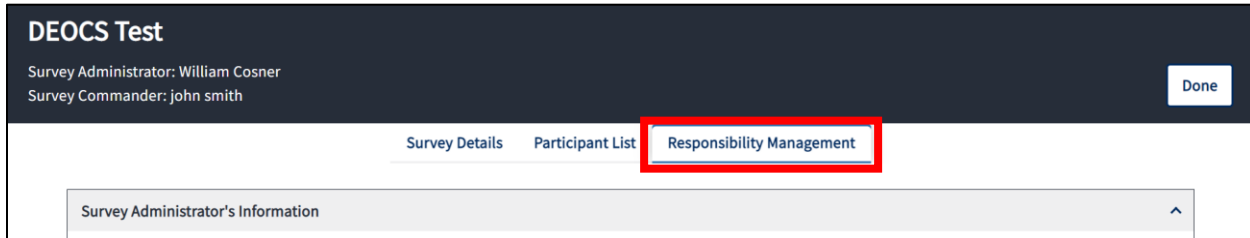
[Create New Survey Request](#)

- **Step 3 – 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.



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

- **Step 4 – Navigate to the “Responsibility Management” tab at the top.**



DEOCS Test

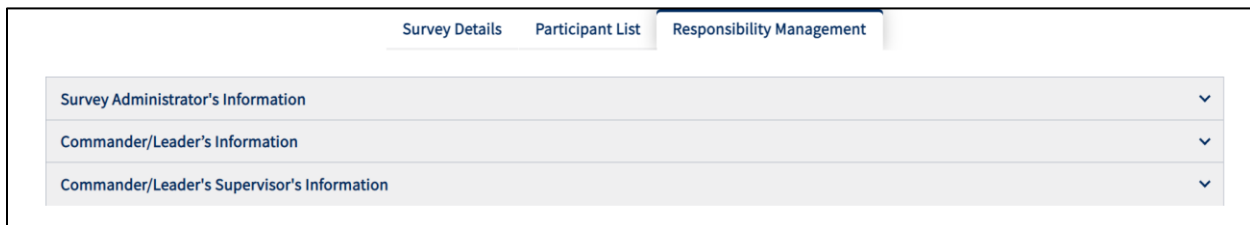
Survey Administrator: William Cosner
Survey Commander: john smith

Done

Survey Details Participant List **Responsibility Management**

Survey Administrator's Information

- **Step 5 – 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.



Survey Details Participant List **Responsibility Management**

Survey Administrator's Information

Commander/Leader's Information

Commander/Leader's Supervisor's Information

- **Step 6 – 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 7 – Using the “User Selection” pop-up window, type in the full e-mail address associated with the proxy’s DEOCS Portal account and click “Select.”**
 - If the user has a Portal account, their account will appear in the search results.
 - If the user does not have a Portal account, they will need to create one before they can be designated as a proxy.⁹

User Selection

Full e-mail address

dwayne.d.beebe.ctr@n

×

Q

Name	E-mail	Select
Dwayne Beebe	dwayne.d.beebe.ctr@mail.mil	Select

⁹ For instructions for creating a DEOCS Portal account, click [here](#), and under step 1, “Prepare,” click on the document titled “How to Request a DEOCS Portal Account.”

- **Step 8 – Review the “Responsibility Management” tab to ensure that the new proxy is displayed in the appropriate user role.**

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

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

Add Proxy

Commander/Leader's Information

Commander/Leader's Supervisor's Information

- **Step 9 – At the top of the page, click the “Done” button.**
 - The new proxy user will now receive all past system e-mails associated with this survey and will also be included on any additional future e-mails.
 - Note that both the original survey administrator, commander, or leader and the proxy survey administrator, commander, or 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 DEOCS Help Desk

If you have questions or any problems throughout the DEOCS process, while transferring a DEOCS, or adding a proxy, please contact our help desk at:

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