Quick Start Guide
for Agency Representatives
The development of this software program and supporting documentation was supported by a grant from CaliforniaVolunteers with funds provided by the U.S. Department of Homeland Security. Grant # 2009-0019, Cal EMA ID 000-92297. The fiscal sponsor for this grant was Lutheran Social Services of Northern California. Points of view or opinions expressed in this document are those of the authors and do not necessarily represent the official position or policies of FEMA's Grant Programs Directorate or the U.S. Department of Homeland Security.
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California VOAD Information Management System

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Executive Overview
The California VOAD Information Management System (Cal VOAD IMS) is a set of secure online tools that enables disaster service providers, VOAD officers and coordinators, and emergency managers to quickly and easily share information about needs, resources, and activities in order to improve outcomes for people who have been affected by disasters. If you have basic computer skills, you will find that Cal VOAD IMS is easy to learn and simple to use.

Why Use It?
The Cal VOAD IMS:

- Makes the **Disaster Resource Directory** for your area is instantly accessible to registered users when needed and includes up-to-date information about your organization so the people coordinating disaster response and recovery activities will know:
  - The types of disaster services that you provide.
  - How to reach you in an emergency.

- Enables you to quickly generate **Agency Status Reports** that will help VOAD coordinators and emergency managers plan the optimal delivery of disaster services throughout the area by summarizing:
  - The services that have been provided, the delivery locations, and the number of clients served.
  - Unmet community needs that are outside your organization’s mission or exceed its capacity.
  - The number of volunteers mobilized and the hours spent in response and recovery activities.

- Tracks **Resource Requests** to help your organization avoid shortfalls that could prevent it from providing much needed services to clients.
Getting Started

1. Contact the **VOAD that coordinates activities in your service area** to confirm that it is implementing the Cal VOAD IMS.
   - Look up current contact information at [www.calvoad.org/find-your-voad](http://www.calvoad.org/find-your-voad).
   - Contact an officer of either NorCal VOAD or SoCal VOAD if:
     - There is no VOAD for your service area.
     - You are located outside California or provide services in multiple California counties.

2. Apply to become a **registered user** of the Cal VOAD IMS if you have not done so already.
   - Go to [www.calvoad.org/ims/app_register/](http://www.calvoad.org/ims/app_register/)
   - Enter information on all four tabs and click the Submit button. You may add a record for your organization during the registration process if one does not already exist.

3. Use the **practice version** of the system to learn about the capabilities of the system.
   - Go to [www.calvoad.org/cal-voad-ims](http://www.calvoad.org/cal-voad-ims) and click **Sign in to the practice version**.
   - Sign in using the sample credentials for your user group listed on the sign-in page.
   - Follow the instructions in the **Procedures** section beginning on the next page to familiarize yourself with the system. Feel free to add and modify the information in the practice version, since it uses a different database than the live version. Please do not delete records that you do not create, so others can also use them.

4. When you receive your sign-in credentials for the **live version** of the system:
   - Go to [www.calvoad.org/cal-voad-ims](http://www.calvoad.org/cal-voad-ims) and click **Sign in to the live version**.
   - Review your personal profile and update it as needed.
   - Review your organization’s contact and resource information and update it as needed if you have the authority to do so.

How to Get Help

The Cal VOAD IMS is simple and easy to use.

- For guidance with procedures, refer to the **Procedures** section beginning on the next page.
- For guidance with a specific field, click the **Help button** next to it, as shown below.
Procedures

Review Your Personal Profile

As a first step, review the information in your personal profile and update it as needed.

- Click People > Update Your Profile.
- Update the information on all three tabs as needed so it is accurate and complete.
- If you are not already linked to an organization on the Step 2. Organizational Information tab, select it from the drop-down list in the Organization field. If your organization is not on this drop-down list:
  - Click the Update this Record button to save any changes you have made.
  - Click the Edit button next to the Organization field.
  - Add a record for your organization.
  - Come back to this page and select your organization in the Organization field.
  - Click the Update this Record button to save the changes.

Review/Update Your Organization’s Information

Next, review your organization’s information to ensure that it is accurate and complete.

- Click Organizations > Service Providers > Update Your Organization’s Contact and Resource Information.

  Note: Even though you are a registered user, you may not be authorized to update your organization’s record. If you are unable to view your organizations record when you select this option and believe you should be authorized to do so, get in touch with your organization’s primary VOAD contact or a VOAD representative to discuss this matter.
Review the information on all four tabs as shown below and update as needed.

Add Users

It is recommended that each organization have more than one registered user authorized to update its information as needed, especially during a disaster. To add a user:

- Click People > Manage Your Organization’s Users > Add a User.
- Add the information requested on Step 1. Personal Information.
- Take care to select the person’s local VOAD affiliation on Step 2. Organizational Information, as shown below.
• Click the **Add a New Person** button.

This person will immediately be added as a registered user, but he or she will not yet be authorized to edit your organization’s record. To **enable this person to edit your organization’s record**:

• Follow the instructions in the “Review/Update Your Organization’s Information” section above.
• Select the person’s name in the **Authorized Record Editors** block.

**Review Your Organization’s Resource Listing**

It important for your organization’s resource record to be accurate and complete. To view how your organization’s resource record will appear to VOAD coordinators and emergency managers:

• Click **Resources > View Your Organization’s Resource Record**.

To change the information included in the resource record:

• Click the **Edit this Record** button at the bottom of the page.
• Update as needed the information on all four tabs.
• Click the **Update this Record** button to save the changes.
Submit a Resource Request

You can submit a Resource Request if your organization anticipates running out of a resource required to provide disaster services. Then registered VOAD coordinators and emergency managers will be able to update the activity log associated with the request as they make progress towards filling it. This provides a single, confidential tool to streamline communication and improve collaboration. To submit a resource request:

- Click Resources > Resource Requests > Submit a Request for Your Organization.
- Enter the requested information on the Step 1. Requesting Organization tab shown below.

- Enter the information requested on the Step 2. Resources Requested tab shown below.
When describing the resource:

- Include the type, kind, size, unit of measure, source, or other characteristics to define the resource or service as precisely as possible.
- If it is a request for a recurring service, such as janitorial services, specify the frequency and estimated duration.

When you have finished entering the description, quantity, and date needed:

- Click the Submit Request button.

**Follow up on a Resource Request**

Once you have submitted a resource request, you can periodically check progress and add your own notes about actions taken to fill it. To do so:

- Click Resources > Resource Requests > Follow Up on a Resource Request.

A searchable list of resource requests submitted by your organization will be displayed on your screen.

- Filter the list as desired and then select the Resource Request that you want to work on.
- You can now update the Status of the request, review the Action Log, and add your own log entries, as shown below.
Submit a Status Report

Submitting regular Agency Status Reports helps VOAD coordinators and emergency managers see the “big picture,” so they can plan the optimal delivery of disaster services throughout the area. To submit a status report for your agency:

- Click Status Reports > Prepare Reports > Submit a Status Report.
- Enter the information requested on the Tabs 1, 2, and 3.
- Click the Save/Update this Report button to begin adding services delivered by your organization, as shown below.
To enter a service that your organization has provided during this reporting period:

- Click the **Add New Service** button on Step 3; select the type of service; and enter the service address, client count, and any comments.
- Click the **up arrow** next to the new entry to add it to the report, as shown below.
To include comments about operating problems, unmet community needs, new resources that your organization has recently acquired, or any other issues:

- Click the **Step 4: Needs & Resources** tab, enter your comments, and click the **Save/Update this Report** button, as shown below.

**Updating and Deleting Status Reports**

You can use the **Update a Status Report** and **Delete a Status Report** functions to manage reports that have been generated for your organization.