Quick Start Guide for Emergency Managers
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Quick Start Guide
for Emergency Managers
California VOAD Information Management System

Contents
Executive Overview.................................................................................................................. 1
Why Use It? ................................................................................................................................. 1
Getting Started............................................................................................................................ 2
   As a VOAD ............................................................................................................................... 2
   As an Individual ....................................................................................................................... 2
How to Get Help............................................................................................................................ 2
Procedures .................................................................................................................................... 3
   Review Your Personal Profile ................................................................................................. 3
   Print a Disaster Resource Directory ...................................................................................... 4
   Follow up on a Resource Request ......................................................................................... 5
   View Summary Status Reports ............................................................................................... 7
   Add and Update Incidents ....................................................................................................... 8
Quick Start Guide for VOAD Officers and Coordinators
California VOAD Information Management System

Executive Overview
The California VOAD Information Management System (Cal VOAD IMS) is a set of secure online tools that enables disaster service providers, VOADs, 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:

- Provides instant access to the latest information in the Disaster Resource Directory for your area so you can quickly locate:
  - Disaster services and resources available from all the service providers in your area.
  - Multiple methods to contact service providers in an emergency.

- Makes it easier to coordinate services throughout your area by generating Agency Status Report Summaries that list:
  - The services that have been provided, the delivery locations, and the number of clients served.
  - Unmet community needs and other issues of concern.
  - The number of volunteers mobilized and the hours spent in response and recovery activities.

- Enables you to review and track Resource Requests from service providers to avoid shortfalls that could prevent them from providing much needed services to clients.
Getting Started

As a VOAD
To successfully implement the Cal VOAD IMS, it is recommended that the local VOAD Executive Committee or other leadership group:

- Appoint an officer or trusted volunteer to take on the role of a VOAD Information Coordinator and take responsibility for implementing the system.
- Ask each member agency to appoint an IMS Liaison.
- Meet with local emergency managers to review reporting procedures and to offer access the Cal VOAD IMS as deemed appropriate.

As an Individual
To get started as an individual:

1. Apply to become a registered user if you have not done so already.
   - Go to 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.)

2. Use the practice version of the system to learn about the capabilities of the system.
   - Go to 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.

3. When you receive your sign-in credentials for the live version of the system:
   - Go to 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.

Click the Help icon to display useful information about a field
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 your organization from the drop-down list in the Organization field. If it is not on this drop-down list:
  - Click the Update this Record button to save any changes that 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.

In a disaster, you may need to track down resources offered by service providers in your area. To do so:

- Click Resources > Find Resources > List by Organization or List Resource Details. (You can use either option to display resource records.)
• Use the search fields if desired to narrow your search for resources and click the Search button, as shown below.

• Click the name of a service provider to view its resource listing.

If you want to update the information included in the resource record:

• Click Organizations > Service Providers > Update a Service Provider and follow the instructions in the section “Add, Update, and Delete Service Providers” above to update the information.

**Print a Disaster Resource Directory**

It is strongly recommended to periodically print the Disaster Resource Directory for your area and store it where you will be able to access it in an emergency. To do so:

• Click Resources > Print Local Resource Directory.
• Follow the prompts on your screen to download a PDF version of the directory
• Use the print controls in your browser or PDF client to print the directory.
Follow up on a Resource Request

When organizations in your service anticipate resource shortfalls, they can use the Cal VOAD IMS to submit resource requests. Once resource requests have been submitted, registers users who are emergency managers and VOAD officers or coordinators can list them, view individual requests, and add entries to an activity log associated with each request as they make progress towards filling it.

This tool supplements existing procedures used in the EOC or Operational Area to track, prioritize, and manage logistics by providing a shared, confidential mechanism for streamlining communication and improving collaboration among service providers, VOAD coordinators, and emergency managers without requiring the EOC to provide access to its information management systems to people who are not certified staff members.

You can periodically review the list of resource requests, identify the status of each request, and document actions that have been taken to fill a request. To do so:

- Click **Resources > Resource Requests > Follow Up on a Resource Request** to display a searchable list of resource requests submitted in your area will be displayed on your screen.
- Filter the list if desired and select the **Resource Request** that you want to work on.
- You can now update the **Status** of the request and review and add entries to the **Action Log**, as shown below.

Continued →
### Follow up on a Resource Request

**Organization & Person Making the Request**
- **Name of Person Making Request**: 
- **Sample Agency Representative**
- **Telephone / Ext.**: (555) 444-1234
- **Email**: sam@sampleagency.org

**Organization**
- **Sample Service Provider**
- **Deliver-to Address**: 1234 State Street, Santa Barbara CA 93105

**Resource Requested**
- **Description**: 12-oz bottles of drinking water
- **Quantity**: 600
- **Date Needed**: 09/24/2012
- **Request Status**: In Progress

**Instructions**
- **To document actions** taken to follow up on this resource request:
  - Click the Record New Action button below, record your actions and the result, and click the Next button.
  - Update an existing log entry, edit the log entry as desired and click the Save button.
  - Update the Request Status field above as needed, and then click the Save button at the bottom of this page.

**To change or delete a request**
- Contact the appropriate person(s) listed below, inform them of the change, and click the Record New Action button to document the changed request.
- If the requested resource is no longer needed, click Request Status above and select Request Cancelled once you have informed the person(s) listed below.
- Click the Save button at the bottom of this page.

**Action Log**

<table>
<thead>
<tr>
<th>Date Time *</th>
<th>Your Name / Organization *</th>
<th>How to Contact You *</th>
<th>Who You Contacted &amp; What You Did</th>
<th>Result *</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/23/2012 10:15</td>
<td>Valerie Vasquez / Sample Agency</td>
<td>(555) 444-1234 or <a href="mailto:valerie@sample.org">valerie@sample.org</a></td>
<td>I called the VOAD Liaison at the EOC and notified her of our request.</td>
<td>Request submit ser...</td>
</tr>
</tbody>
</table>

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1. Click to begin adding your entry.
2. Update the status of the request and indicate the result of your action.
3. Click the up arrow to finish adding your entry to the log.
View Summary Status Reports

It is recommended that each local VOAD require its member agencies to submit Agency Status Reports after a disaster on a regular schedule determined in consultation with the local Office of Emergency Management. The individual reports are automatically collated into summary reports that can be filtered by incident, county, and reporting period. Reviewing these reports makes it much easier to get a comprehensive view of response and recovery activities, thereby facilitating more efficient coordination of services throughout the area. To view a summary status report:

- Click **Status Reports > View Reports** and then click one of the following:
  - **Services Delivered in Your Area.** The services that have been provided, the delivery locations, and the number of clients served.
  - **Needs and Resources in Your Area.** Unmet community needs, newly acquired resources, and other issues of concern.
  - **Volunteers Mobilized in Your Area.** The number of volunteers mobilized and the hours spent in response and recovery activities.
Add and Update Incidents

Each Agency Status Report must be linked to a specific incident. Linking the status reports to incidents makes it possible to obtain a comprehensive view of the disaster response and recovery activities related to a specific incident. You should therefore add an incident that triggers the activation of your VOAD as soon as possible after the incident occurs. Registered users who are either VOAD Coordinators or Emergency Managers are able to add and update incidents. To do so:

- Click Incidents > Update an Incident to view the list of incidents already in the system. If the incident in question is already listed, you of course do not need to add it. However, you can update it with any new information, such as an official declaration number.
- If the incident has not yet been added, click Incidents > Add an Incident to display the Add a New Incident page, as shown below.

- Enter the official name of the incident, if it has been determined. If not, enter a working name, which you can update later.
- Enter the date the incident started, not the date of the disaster declaration. (This also can be updated later in necessary.)
- The declaration type and number are optional and can be added when announced at a later date.
- Click the Save button to add the incident to the database.