Quick Start Guide for VOAD Officers and Coordinators
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

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:

- 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.
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.

Review/Update Your Organization’s Information

Next, review your organization’s information to ensure that it is accurate and complete. To do this, select Update a Service Provider as described in the next section and update your organization’s record as needed.
Add, Update, and Delete Service Providers

The functions for adding, updating, and deleting service providers are very similar. They are listed as separate menu options for the sake of simplicity. Note that each organization’s disaster resource listing is contained on the tab, Step 4. Services & Resources. Government agencies are considered service providers; they are distinguished by the type of service that they provide.

To update a service provider:

- Click Organizations > Service Providers > Update a Service Provider.

A searchable list of organizations will be displayed, as shown below.

- Use the search fields if desired to find the organization whose record you want to update.
- Click the “edit” icon next to an organization’s name to display its record.
• Review the information on all four tabs as shown below and update as needed.

• Click the Update this record button to save the changes.

Approve New Organizations

When a new user registers, he or she can also create a record for a new organization. Both the user and the organization will be assigned a “Pending” status until they are reviewed and approved by a local or state-level VOAD coordinator. To review and approve recently added organizations:

• Click Organizations > Service Providers > Update a Service Provider as shown in the previous section. The approval status of each organization is listed in the column on the far right.
• Select an organization, review the information on all four tabs, and update as needed.
• Consult with other VOAD officers as needed to determine whether the organization should be included in the Cal VOAD IMS database.
• In the lower left corner of the Step 1. Organization tab, select the appropriate status, as shown on the right, to reflect the decision that has been made.
• Click the Update this record button to save the changes.
Approve New Users

When new users register, they are assigned a “Pending” Status until their records are reviewed and approved by a registered Local VOAD Coordinator or State VOAD Coordinator. Their status must be changed to “Active” in order for them to be able to use the system. To do so:

- Select People > Update a User.

A searchable list of registered users will be displayed, with each user’s approval status shown in the far right column, as shown below.

- Use the fields at the top of the page to filter the list if desired and click the Search button.
- Click the Sort icon at the top of the Status column icon if desired to re-order the list by Status.
- Click the Edit icon to the left of a person’s name to display his or her record.
• Review the information on all four tabs and update if needed.
• Update the user’s status on the Step 3. User Status tab, as explained in the next section.

Add, Update, and Delete Users

The functions for adding, updating, and deleting service providers are very similar. They are listed as separate menu options for the sake of simplicity. It is good practice to ask people who want to become users to submit the online registration form at www.calvoad.org/ims/app_register. However, from time to time you may want to add a user to the system yourself. To add a new user:

• Select People > Add a User.
• Add information on all three tabs. Pay special attention to the Step 3. User Status tab, shown below.

Be sure to select the correct User Group.
Set the User Status to Active.
Do not select a Service Area, unless the user is a VOAD Coordinator or Emergency Manager.
• Click the Add a New Person button at the bottom of the page.

Continue →
This person will immediately be added as a registered user, but he or she will not yet be authorized to edit an organization’s record. To **enable this person to edit the record of the organization with which he or she is affiliated**:

- Follow the instructions in the “Add, Update, and Delete Service Providers” to display the organization’s record.
- Select the person’s name in the **Authorized Record Editors** block on the **Step 1. Organization** tab, as shown below.

  ![Authorized Record Editors](image)

- Click the **Update this Record** button at the bottom of the page.

**Find Resources**

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.)

  ![Find Resources](image)

 *Continue ➔*
• 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.

Review Your Organization’s Resource Listing

As a VOAD officer or coordinator, you are probably also a representative of a service provider. 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 follow the instructions in the above section, “Find Resources,” to view the record for your organization. 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 for your organization.
Print a Disaster Resource Directory

It is strongly recommended to periodically print the Disaster Resource Directory for your area, since you may not have access to the Internet in a disaster. 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.

Store the printed version where you will be able to access it in an emergency.

Submit a Resource Request for an Organization

Organization in your service area may anticipate running out of a resource required to provide disaster services. You should encourage a registered user from any organization anticipating a resource shortfall to submit a resource request online. However, from time to time you may need to submit a resource request on behalf of an organization. Once the resource request has been submitted, registered users who are representatives of the agency, VOAD coordinators, and emergency managers can 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 on behalf of an organization:

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

Continue →
• Select the **Step 2. Resources Requested** tab shown below and enter the information requested.

![Submit a Resource Request](image)

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 a resource request has been submitted, 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 in your area will be displayed on your screen.

• Filter the list if desired and the select the **Resource Request** that you want to work on.

*Continued →*
• You can now update the **Status** of the request and review and add entries to the **Action Log**, as shown below.

![Diagram of Action Log](image)

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.

Submit a Status Report for an Agency

To ensure that the summary status reports are timely and complete, you may decide to contact service providers, obtain the necessary information, and submit status reports on their behalf. To do so:

- Click Status Reports > Prepare Reports > Submit a Status Report for an Agency.
- Enter the information requested on Steps 1, 2, and 3.
• Click the **Save/Update this Report** button to begin adding services delivered by the organization, as shown below.

![Submit a Status Report](image)

To enter a service that the organization has provided during this reporting period:

• Click the **Add New Service** button on Step 3.
• Select the **type of service**.
• 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.
• Click the **Save/Update this Report** button.

![Submit a Status Report](image)
To include comments about operating problems, unmet community needs, new resources that the organization has recently acquired, or any other issues of concern:

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

**Update and Delete Status Reports**

You can use the Update a Status Report and Delete a Status Report functions to manage reports that have been submitted by organizations in your service area.
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 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.