



# **Volunteer Mobilizer 4.4**

## **Administrator Guide**

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## Welcome

Welcome to your ESAR-VHP (EMRegistry / EMCredential / Volunteer Mobilizer) solution.

This is a comprehensive, secure web-based solution for the advance registration and credentialing of healthcare volunteers. Intermedix EMSystems' EMRegistry / EMCredential / Volunteer Mobilizer solution meets and exceeds the Assistant Secretary for Preparedness and Response (ASPR) standards for the Emergency System for the Advance Registration of Volunteer Health Professionals (ESAR-VHP). It is available 24/7/365 from wherever Internet connection exists.

This multi-functional volunteer registration solution offers the combination of proven track record, industry expertise, strong partnerships, and numerous statewide implementations.


Our solution supports ESAR-VHP administrators and their response partners through its intuitive registration, searching and reporting, credential verification, alerting, and customizable features. The numerous tasks associated with managing healthcare volunteers are the focus of our system, ensuring administrators have an efficient and effective tool prior to and during a response.

This solution supports the qualification and management of volunteer care providers across jurisdictional lines. Information is aggregated into a secure statewide database, where health professionals' credentials are verified, updated, and assigned the appropriate ESAR-VHP emergency credentialing levels. During public health emergencies, the solution allows for access of volunteer data onsite or from a staging area in order to verify professionals' identity and credentials.

## Get Started

The flexible and efficient design of your ESAR-VHP system meets the continually changing needs of the coordinators and volunteers responsible for planning for and responding to large- and small-scale disasters/incidents.

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 The features that are visible and available to you within the application depend on your role. For example, a group administrator will have access to more features (such as volunteer administration) than a volunteer. In this Help system, you may see information on features and functions that you do not have access to. For information on roles and access, see [User Roles and Rights](#).

---

Read through the topics in this section to learn how to:

- [Log in](#)
- [Log out](#)
- Interpret [page elements](#)
- Understand the [Home page](#)
- [Navigate](#)
- Work with the [calendar](#)

In addition, read the following:

- [Volunteer Registration Basics](#)
- [Participants](#) and [Components](#)
- [Administer Application](#)
- [Help system](#)

## Log In

Use your username and password to log in to the application.

### To log in

- 1 Open your browser
- 2 In the browser address bar, type the Web address (URL) of the application.
- 3 Press **ENTER** or click your browser's **Go to** button.

The *Login* page opens.

- 4 Enter your **Username**.
- 5 Enter your **Password**.
- 6 Click **Login**.

The application's *Home* page opens.

## Log Out

When you are done using the application, you can log out and close your browser window.

## To log out

In the upper right corner of the application, click **Log Out**.

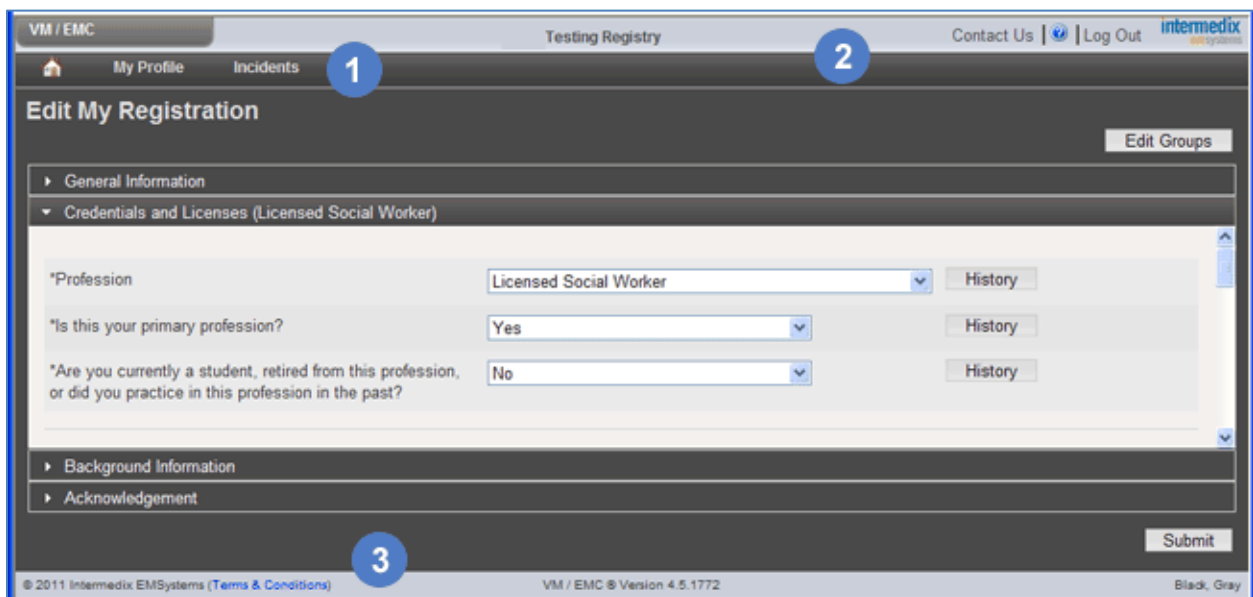
You are logged out of the application. The *Login* page re-opens.

## Page Elements

The system is designed so that you can easily navigate throughout the application and readily locate the information you need or the task page you want. While each page contains information specific to your task, the basic layout of each page remains constant so that you can become familiar with the application in a short period of time.

See also [Home Page](#).

Using this example of the page from the application, look for the following standard elements:



Number	Description
1	The main navigation bar provides access to key information and tasks for working with your profile and volunteer information (if you are an administrator). Hover over an area/option in the menu bar; a drop-down menu opens. Select an option to open that area.
2	The upper right area of the page provides access to the following: <ul style="list-style-type: none"> <li>The <b>Contact Us</b> link opens the <i>Contact Information</i> dialog box, which contains the contact information your administrator specified for your State or division. This can include an email address link.</li> <li>Click the <b>Help</b> icon to open the volunteer registry <a href="#">Help system</a> in a new window. This comprehensive system includes a detailed Table of Contents and Index, as well as a Search feature, so that you can readily find the information you need.</li> <li>Click <b>Log Out</b> to <a href="#">log out</a> of the application.</li> </ul>
3	Click <b>Terms &amp; Conditions</b> in the page footer to view the Intermedix EMSystems <i>Terms and Conditions of Use</i> for this application. This document opens in a new browser window.

## Home Page

When you first log in to the application, the *Home* page opens, showing a summary of your Groups and Profession(s) at the top, and a variety of other information that applies to you or to a group you have joined. Group information is available in this page after you have been approved for the group.

See also [Page Elements](#).

Use the following illustration and table to view and learn about *Home* page standard elements:

Number	Description
1	<b>Group and Profession Information</b> - Your name appears in this section on the left side of the page. The left panel displays the groups you have joined and have requested to join. Click a group name to view group details, including contact information. The right panel shows your profession(s) and your credential level for each.
2	<b>Messages</b> - This section displays messages your administrator(s) have sent to all volunteers or to the group(s) you have joined. Click a message to read its content. The <i>Details</i> dialog opens, showing you the title, type, and details of the message. Click <b>Close</b> to close the dialog box.

Number	Description
3	<p><b>Tasks</b> - Any tasks assigned to you appear in this section. Tasks are grouped by category, and the second column may indicate the number of tasks within the category. The table also indicates when the task was generated in the system. Clicking the row for the task takes you to the appropriate page in the application where you can work on and complete the task.</p> <p>For example, when a volunteer's credential is nearing expiration, the <b>Update Expiring Dates</b> task appears in their <b>Tasks</b> section. When the volunteer clicks the task, their <i>Edit My Registration</i> page opens, where they can make the appropriate <a href="#">changes</a> and submit them for review. For expired credentials, the <b>Update Expired Dates</b> task appears in the queue.</p>
4	<p><b>Calendar</b> - Activities that apply to the group(s) you joined appear in the calendar on the right side of the page. See <a href="#">Work with the Calendar</a> for more information.</p>

## Navigation and Features

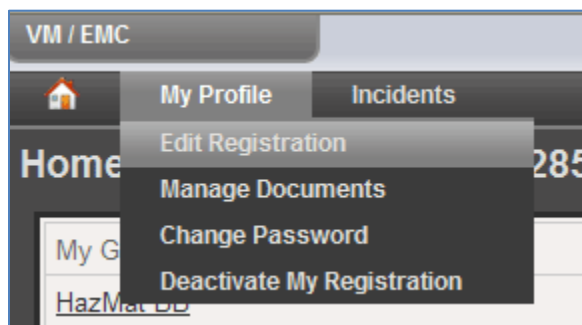
This topic highlights and describes various aspects of [navigation](#) in your volunteer registration application. In addition, certain [features](#) are common to all or many of the pages within the application.

See also [Page Elements](#), [Home Page](#), and [Work with the Calendar](#).

### Navigation

#### Menu bar

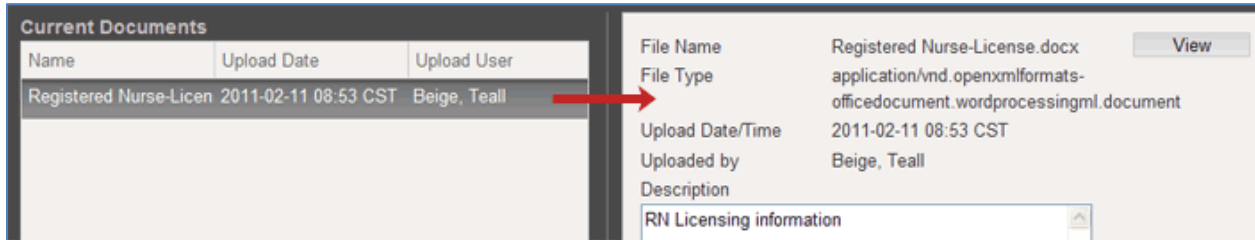
The main navigation bar provides access to key tasks, such as updating your profile and registration information or managing your documents.



Click an option in the navigation/menu bar, or hover over an option to open a drop-down menu. Select a menu option to open that area. In the example, the user opened the **My Profile** menu, and is about to select **Edit Registration**.

## Panes

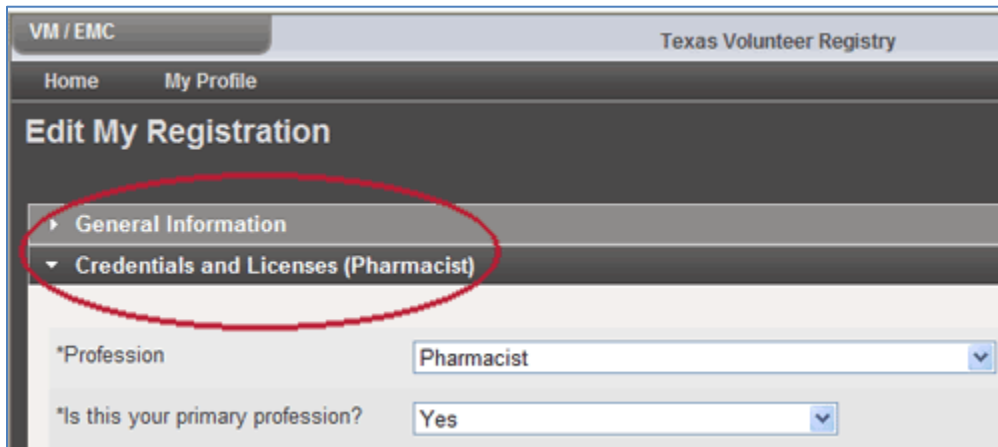
Some pages within the application have multiple panes. The example below is from the **My Profile > Manage Documents** area.



Generally, the left pane shows summary information on an item. When you click the item in the left pane, the right pane shows details for the selected item.

## Drawers

Some areas contain a great deal of information and/or a number of types of related information. The information is organized into "drawers."

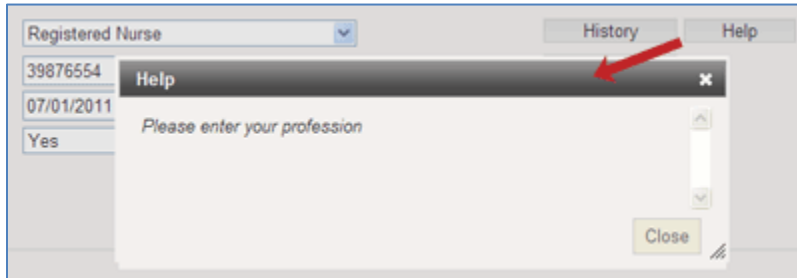


This is an example of a volunteer's profile; the information appears in two drawers. Clicking the drawer opens it. In this case, the **Credentials and Licenses** drawer is currently open.

## Features

### Field/question Help

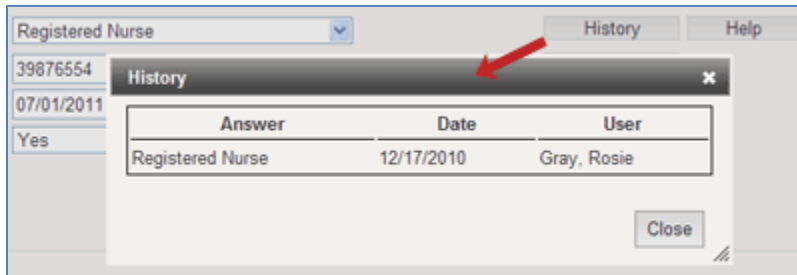
When your administrator configured the fields or questions in the registration pages, they may have opted to include a brief description or set of instructions for that question. This information is available to the user via the **Help** button next to the question. Clicking the button opens the *Help* dialog box.



Click **Close** to close the dialog box.

### Field/question History

You can also view the history of changes to a field or question. For example, after you enter a profession and save your changes, the **History** button appears next to that field. Clicking the button opens the *History* dialog box containing information on when the information was entered or changed and by whom.



Click **Close** to close the dialog box.

### Required fields

Some questions/fields require a value before the registrant or volunteer can proceed with their task. Required fields are marked with an asterisk (\*).

### Registration - Edit

▼ General Information

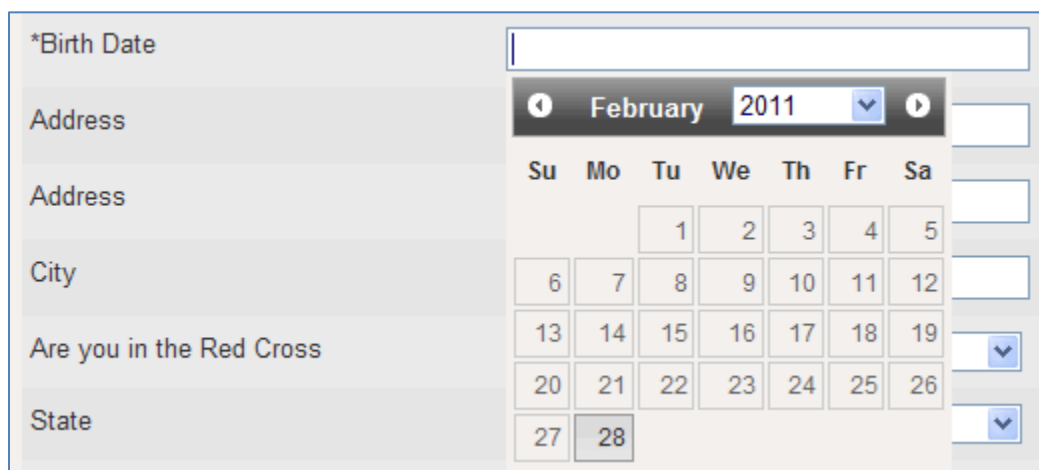
**Personal Information**

\*First Name

\*Last Name

## Calendar tool

When you need to specify a date, click in the field. The calendar tool opens.

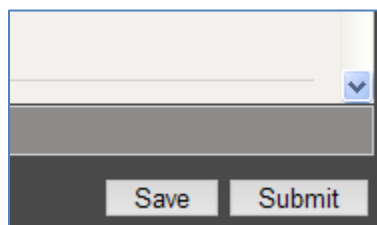


The screenshot shows a form with several fields: \*Birth Date, Address, City, Are you in the Red Cross, and State. A calendar tool is open over the \*Birth Date field, displaying the month of February 2011. The calendar grid shows days from 1 to 28, with the 28th highlighted. The calendar tool has navigation arrows and a year selection dropdown.

By default, the calendar shows the current month, with the current day in a slightly darker shade. Use the arrows on the right and left to scroll through the months. Use the drop-down field at the top to select a year. Select the date. The calendar closes and the date appears in the field.

## Action buttons/options

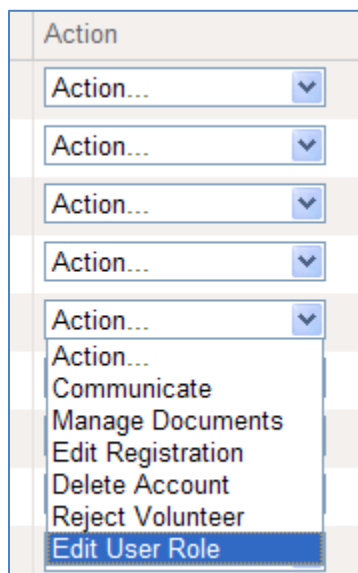
Depending on the area of the application, various action buttons may be available. For example, when you are entering contact information and/or volunteering for a group, the **Save** and **Submit** buttons may be available.



The screenshot shows a form with a dropdown menu and two buttons: Save and Submit. The Save button is highlighted.

Clicking **Save** saves the information you entered or selected. Clicking **Submit** saves the information and also submits it to the application (and, potentially, your administrator) for review.

Actions may also be available via an **Action** column in a table, as shown below:



In this example, an administrator is going to edit a volunteer's role.

## Work with the Calendar

Your volunteer *Home* page includes a **Calendar** of activities. Your administrator(s) adds activities to this calendar, and those that apply to you and your group(s) appear on your *Home* page. You can view the details for any activity you see in the calendar.

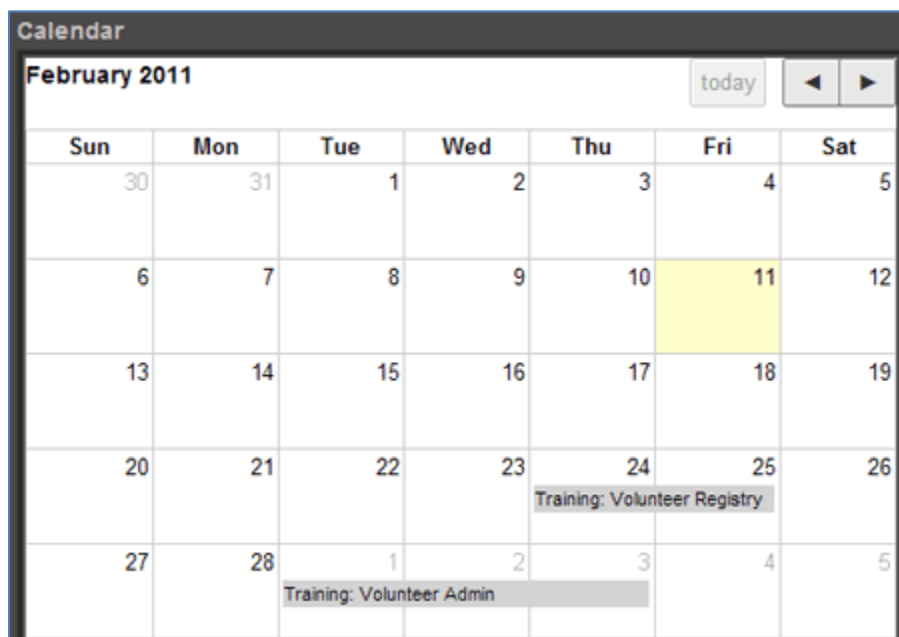
### To navigate the calendar

By default the current month appears in the *Home* page when you first log in. The current date appears in a different color.

You can navigate within the calendar as follows:

- Click the arrows in the upper right corner of the calendar to move from month to month.

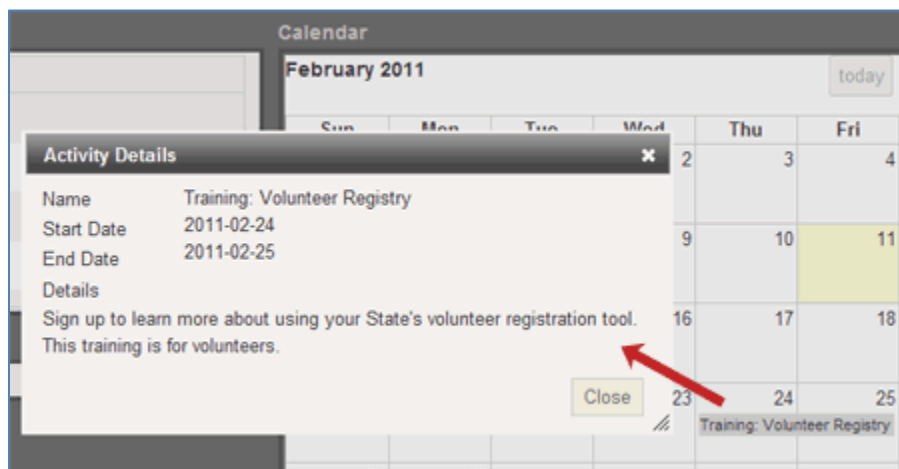
- To return to the current date, click **today**.



### To see activity details

Each activity in the calendar is a link to its detail.

Click the activity. The *Activity Details* dialog box opens, showing the activity's name, description, and start and end dates.



Click **Close** to close the dialog box.

## Forgotten Username or Password

You need two items to log in to your ESAR-VHP application: username and password.

This topic covers what to do if you:

- [Forget your username](#)
- [Forget your password](#)

### Forgot Username?

If you forget your user name, do the following:

- 1 Go to the login page.
- 2 Click the **forgot username?** link.  
The *Look Up Username* page opens.
- 3 Enter your **Email Address**.
- 4 Click **Submit**.  
The *Maintenance - Message* page opens, indicating your username has been sent to the email address provided.
- 5 Click **OK**.
- 6 Check your email.  
The email message contains your username as well as a link to the login page of the application.
- 7 Click the link in the email.  
The login page opens.
- 8 Enter your **Username** and **Password**.
- 9 Click **Log In**.

### Forgot Password?

If you forget your password, do the following:

- 1 Go to the login page.
- 2 Click the **forgot password?** link.  
The *Reset Password* page opens.
- 3 Enter your **Username**.
- 4 Click **Submit**.  
The *Information* page opens, indicating an email message has been sent to you.
- 5 Click **OK**.
- 6 Check your email.
- 7 Click the link in the email.  
The *Verify Identity* page opens.
- 8 Enter your security challenge answer in **Your answer**.

9 Click **Submit**.

The *Set Up Password* page opens.

10 Enter your **New Password**, and enter it again in **Verify Password**.

11 Click **Submit**.

A confirmation page opens.

12 Click **OK**.

The login page re-opens.

13 [Log in](#) to the application.


## Volunteer Registration Basics

Your ESAR-VHP solution (EMRegistry / EMCredential / Volunteer Mobilizer) is a comprehensive, secure web-based system for the advance registration and credentialing of healthcare (and nonhealthcare) volunteers. It is available 24/7/365 from wherever Internet connection exists.

This system is designed around the following two key roles and their tasks:

- Volunteer - registering to be a volunteer; requesting to join one or more groups; updating their profile (contact, profession, license) information
- Administrator - validating, communicating with, and deploying volunteers; customizing the application to meet the needs of their volunteers and groups

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 Incidents require additional roles, with specific sets of rights. See [User Roles and Rights](#) for more information.

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The flexible and efficient design of our volunteer registration and management system meets the continually changing needs of coordinators and volunteers alike.

### What is ESAR-VHP?

Our ESAR-VHP product meets and exceeds the Assistant Secretary for Preparedness and Response (ASPR) standards for the Emergency System for the Advance Registration of Volunteer Health Professionals (ESAR-VHP).

ESAR-VHP is a U.S. Department of Health and Human Services program established at the State level to support efforts to recruit, organize, and manage healthcare volunteers. The program emphasizes verifying the credentials of health professionals as part of emergency preparation, so that volunteers can be deployed quickly at the time of an actual incident.

For more information, see the [ESAR-VHP website](#).

### More Information

See also:

- [Registration](#)
- [Volunteer Administration](#) (including validation of credentials)

### Registration

Emergency response effort begins with the recruitment and registration of a broad selection of healthcare and nonhealthcare volunteers. This application's self-registration process is designed to accommodate a wide range of volunteers with multiple types of skills and qualifications, thus allowing a State, region, or jurisdiction to create an extensive selection of volunteers.

Read the following sections to learn more about:

- [Form](#)
- [Registration process overview](#)

## Form

Building a well-rounded collection of volunteers is simplified with the system's customizable, intuitive, and interactive registration form. Customizing the form for each type of volunteer reduces the amount of time it takes to register while increasing the validity of the information.

In addition, the solution supports "on-the-fly" creation of unique questions. This allows administrators to instantaneously adapt the solution to the specific nature of the incident.

See [Forms](#) for details.

## Process Overview

The more complete a volunteer's registration form, the more efficiently that individual can be identified and deployed for an incident.

All too often volunteers enter the system, start the registration process, and then do not complete it. For a volunteer, completing the required ESAR-VHP questions, determining which group(s) to join, and figuring out exactly what is meant by a question can be an overwhelming experience.

To reduce the obstacles volunteers face, strategically placed guidance appears throughout the system. Some of the directions are hard coded, while others can be added at an administrator's discretion.

In addition, the application allows administrators to search for and contact those volunteers who have not completed their registration, thereby decreasing the number of volunteers who do not complete their form.

When a volunteer submits their registration form, they wait to hear whether they have been approved as a volunteer and accepted into one or more groups. At this stage, they have access to the application, but not to the group(s) they specified. Once accepted, their *Home* page shows their groups and related information, such as informational and emergency messages, tasks they need to complete, and a calendar listing activities or training sessions. From here they have the ability to edit their registration form or group membership.

## Volunteer Administration

Your ESAR-VHP application is designed to decrease the time administrators spend in managing the system while increasing the validity of volunteer data. The application:

- Supports administrators and volunteers during an incident
- Provides the tools administrators need to plan for incidents, customize registration forms, and maintain the system

The application's built-in flexibility and user-friendly features facilitate administrator tasks, enabling them to:

- Organize response efforts for emergency incidents of all sizes
- Locate the correct volunteers for the type and size of incident (quick, robust searching methods)
- Communicate with volunteers quickly and efficiently
- Easily enter data (pre-incident and real-time), verify credentials, and approve group membership
- Quickly adapt the application to present and future needs (customization)

## Validation Overview

Hospital, local, regional, and State Emergency Management Coordinators will not use volunteers whose credentials are not up to date. Therefore, validated volunteer credentials are essential. This ESAR-VHP solution provides all required components for validating credentials, as well as additional automated features for validating a volunteer to a Level One.

Validation begins the moment a volunteer clicks **Submit** in their registration form. The system immediately sends the credentials off to the appropriate databases, already set up through a web service or flat file interface.

The automation of credentialing significantly reduces the amount of time required to check and verify records. Furthermore, the system can automatically reverify credentials prior to their required six-month review, eliminating the need for manually reviewing all volunteers on a bi-annual basis.

Administrators do not have to determine the credential level of each volunteer; the system uses an algorithm to automatically determine the level. If needed, an administrator has the power to override the credential level.

See also [Trusted Sources](#) and [Validation](#).

## Participants

Your ESAR-VHP compliant volunteer registration and management system is comprised of the following participants:

Participant	Description
<a href="#">Administrator</a>	User of the system assigned to administer and oversee the maintenance of the system and/or manage collections, groups, group filters, and users
Volunteer	Individual whose registration and credentials have been accepted (validated) and who has been accepted into one or more groups (group approval)
Registrant	Individual who has accessed the application, but has not yet completed their registration (this individual is not yet a volunteer) and has not been approved for at least one group
<a href="#">Group</a> and <a href="#">Filter</a>	Organizational units, usually made up of volunteers with similar roles or from the same general location
<a href="#">Collection</a>	Organizational unit; set of groups for the purpose of controlling the number of groups a volunteer belongs too
<a href="#">Roles</a>	Combination of a certain level of rights or permissions, defining what the volunteer or administrator can view and perform within the application

Volunteers can submit their credentials for review and approval, and request to join one or more groups. Administrators can have a variety of rights within the system, including validating volunteer credentials and approving their group requests.

Groups are organized into collections. For each collection, the administrator specifies how many groups the volunteer must or can attempt to join, the information and credentials the volunteer must provide, and so forth.

The system provides both volunteers and administrators with a number of tools for [collaboration](#), such as:

- Notifications, messages
- Interactive calendar
- Document management

## Administrators

Administrators manage volunteers and oversee the maintenance and use of the system, including approving volunteer credentials, posting group *Home* page content, and sending communications. Based on the level of support an individual administrator needs to provide, you can assign the appropriate role and management rights for performing these tasks.

This application provides three levels of administration: collection, group, and group filter. Each administrator can view the *Home* page and volunteer profile details for each group they have permission to manage.

Collection administrators can perform administrative tasks for all volunteers and volunteers groups in their collection. Group and filter administrators can perform functions relevant to the groups and filters

they manage. A higher ranking administrator can delegate certain tasks by assigning group and/or filter administrators to manage those tasks.

In addition to the predefined administrator roles, authorized administrators can create new [roles](#) with unique sets of rights and permissions.

Your ESAR-VHP compliant volunteer registration and management system:

- Involves a number of [participants](#), including registrants, volunteers, and administrators.
- Is comprised of a number of [components](#) that aid in communication, collaboration, and administration.

## Collections and Groups

ESAR-VHP administrators can organize their volunteers as best fits their needs. The group configuration model supports local policies and classification, and reflects unique State or local needs. States can create collections and groups of volunteers based on their location, qualification, or skills.

As an administrator creates additional groups, they can also assign an administrator to the group either by creating a new user or selecting a user who is already in the system.

Read the following sections to learn more about:

- [Administration](#)
- Collection and group [hierarchy](#)

See also [Group Filters](#).

### Administration

Any administrator can view and access tasks and information in the application related to the collections, groups, and/or group filters that administrator manages.

If authorized to do so, administrators can configure group collections as well as create and edit groups. Collections allow your organization/entity to control the number of groups a volunteer can belong to.

Each group must belong to a group collection, and can belong to only one collection.



Your organization may have set up a "general" collection for groups that do not intrinsically belong with any other groups.

---

Collections are either:

- Restricted - a volunteer can join only a specified number of groups in the collection
- Unrestricted - there are no restrictions on the number of groups a volunteer can join within the collection

In addition:

- A collection can be required. That is, a registrant must register for at least one group in the collection.
- Volunteers can join groups from multiple collections.
- Each group should have at least one group administrator.

## Hierarchy

The *Manage Group Collections* page shows the existing collections, including their names and the groups in each collection.

The area displays collections and the groups within them in a hierarchical format. **Collections** appears at the top of this hierarchy. Click the arrow to the left of this heading to open up the next level, which shows the collections that have been established. From this level you can edit a collection or open it up to view and work with its groups. The hierarchy also provides access to the administrator(s) assigned to each collection or group.

If desired, you can also create a level below **Groups**, called **Group Filters**. A collection can contain one or more groups, and each group can contain zero, one or multiple [group filters](#).

## Group Filters

Authorized administrators can identify zero to many filters within groups in the collections they manage.

Group filters allow you to build "subgroups" based on information your volunteers provide in their profiles. These are not groups that the volunteer or registrant signs up for directly from your organization's registration form. Rather, they are built on dependencies your State administrator identified. In this way, volunteers are not necessarily confined to the groups for which they registered.

## Example

Your State has been divided into four regions: Northeast, Southeast, Southwest, and Northwest, and you have the list of counties that fall into each region.

As State volunteer administrator, you want to identify available volunteers in your state's HazMat (Hazardous Materials) group based on these regions.

Within your HazMat group you establish those four regional filters. You base each of these (make them dependent) on counties in your state, and specify those counties for each filter. Automatically, volunteers in your HazMat group who reside in counties A, B, C, or D are "members" of the Northeast group filter, because their counties fall into that filter. Likewise, any new registrants who are approved to join the HazMat group are automatically part of one of these filters based on the county they specified in their profile.

As an administrator, you can easily find all HazMat volunteers in any of these regions via a simple search.

Finally, you can assign one or more administrators to a filter in order to delegate management tasks for all volunteers who fall into that filter.

## User Roles and Rights

A user of this application must have one (and only one) role. When a new user (registrant or volunteer) comes into the system, they are automatically assigned the **Volunteer** role. An administrator can change a user's role, either through that user's profile or when assigning that user as an administrator of a collection, group, or group filter.

Each role has a certain level of rights or permissions associated with it. For a volunteer, this may be as simple as being able to edit their own profile information and documents. For an administrator, the capabilities can range from validation and approval tasks to developing and editing registration forms to managing information in this application.

The topic covers the following:

- [Incident roles](#)
- [Level of visibility](#)
- [Rights](#)
- [Default roles](#)
- Example of a [new role](#)

## Incident Roles

Incidents and events call for specific roles and access, based on tasks and assignments. Users are assigned these roles for a specific event.

See [Incident Roles and Security](#) for more information.

## Level of Visibility

A user's role/rights are further limited by that user's position (level of visibility) in the collection and group hierarchy.



Role, group, and group filter names in the following examples are fictional.

**Example 1:** You have been assigned the customized "FormAdmin" role, which has the Manage Forms right. If you manage a collection, you can manage the registration form for the collection as well as individual groups within the collection. If you administer a group, you can manage the form for that group; you cannot manage forms for other groups or for the collection.

**Example 2:** You have been assigned to be the administrator of the "Northeast" [group filter](#) of the "HazMat" group. You have also been assigned the "FilterAdmin" role, which has the Approve Group Requests right. You can approve requests to join the "HazMat" group. However, since you only have visibility to the members of that group who are also in your "Northeast" filter, you can only approve requests from those group members who fall into that filter.

## Rights

The following table shows all application rights that can be granted to roles:

Right	Description
Edit Personal Profile, Groups, and Documents	Base level of permissions granted to most users of your system (volunteers); volunteers can edit their profile information, view and request group membership, and upload and manage their documents
Division Administration Rights	Manage division-level settings, such as registration instructions, the division's contact information ( <b>Contact Us</b> link), and content for various email messages (templates)
Edit Registrations	Register (create) a volunteer and edit volunteers' registration forms

Right	Description
Manage Groups and Collections	Add and edit collections, groups, and group filters
Manage Group Administrators	Add, edit, and remove administrators for collections, groups, and group filters
Manage Forms	Manage registration forms, including adding sections, questions, and form answer lists
Manage Calendar Activities	Add, edit, and delete activities in a group's calendar
Manage Messages and Send Communications	Manage messages that appear to volunteers on their <i>Home</i> page, and send messages to volunteers in the group
Manage Roles and Rights	Add and edit roles and the rights associated with each; view rights associated with default roles
Approve Group Requests	Approve registrants' and volunteers' requests to join a group
Validate Forms	Validate a registrant's or a volunteer's registration form, including reviewing results of automated processes and performing manual validation of the individual's credentials; validation results in a credential level for the volunteer
Delete Account	Delete a user's account from the system
Reject Volunteer	Reject a registrant's or volunteer's request to be a volunteer (associated with Validate Forms right); reject a registrant's or volunteer's request to join a group (associated with Approve Group Requests right)

## Related Rights

Rights are designed to address "bundles" of tasks. For example, if you assign the Manage Forms right to a role, the administrator with that role can add sections and questions to their group's registration form and also create form answer lists to be used in their form.


Likewise, you can give a role full validation rights, which allows them to approve/reject volunteer credentials and also approve (or reject) requests to join the groups they manage. To do so, you assign three rights to that role: Validate Forms, Approve Group Requests, and Reject Volunteers. If you want a role that can approve forms and group requests, but cannot reject a volunteer, you do not include Reject Volunteers in the rights for that role.

## Default Roles

The system offers three default roles: **Administrator**, **Limited Administrator**, and **Volunteer**. Each of these roles has a certain defined set of rights and, thereby, access to certain portions of the application. By default, all roles have access to their own volunteer profiles (**My Profile** menu).



You also have a State/Division Administrator. This role was established when your volunteer management system was put into place.

 An administrator who can manage roles and rights can view the rights associated with these default roles but cannot change them. If you want an administrator to have a different set of rights than specified in the default roles, you will need to create a [new role](#).

When a user is assigned to be an administrator of a group (with an appropriate administrative role), they can search for volunteers they manage and run a report on volunteers' professions. The **Volunteers** menu provides access to these features.

The three default roles have the following rights and, thereby, access to specified areas and menu options and their associated tasks:

### Role: Group Administrator

Rights	Home Page, Tasks	Volunteers Menu	Search Results Page	Administration Menu
Manage Messages and Send Communication			Communicate	Messages
Manage Calendar Activities				Calendar
Approve Group Requests	Group Approval			
Validate Forms	Form Validation	Validation		
Reject Volunteer			Reject Volunteer	

### Role: Limited Administrator

Rights	Search Results Page	Administration Menu
Manage Messages and Send Communication	Communicate	Messages
Manage Calendar Activities		Calendar


### Role: Volunteer

A volunteer has access to their own profile, registration information, groups, and documents.

### New Role Example

If you have the appropriate administrative right (Manage Roles and Rights), you can set up roles with any combination of the [rights](#) listed above. For example, if you want an administrator to be able to manage groups and administrators, you can [add a new role](#). You assign the same six rights listed above for the [default Administrator role](#), and then add the following to your selections:

- [Manage Collections and Groups](#)
- [Manage Administrators](#)


 A role you add is considered administrator level if you assign administrative rights to it.

## Components

Your volunteer registration and management system is comprised of a number of components and tools to aid volunteers and administrators in [collaboration](#) and communication, both internally and externally. Internal (application user) tools include:

- Notifications, messages
- Interactive calendar
- Document management

Other components include the following:

 Your ESAR-VHP system is highly [customizable](#) and adaptable. The management of many of the following components and settings is in the hands of the administrator(s).

Component	Description
<a href="#">Forms</a>	Flexible and robust tool ( <b>Form Builder</b> ) for customizing registration forms in order to tailor the forms to the needs of their State, collection, group, and/or group filter; see also <a href="#">Questions and Answers</a>
<a href="#">Searches</a>	Robust method for finding the appropriate volunteers based on any information in volunteers' profiles
<a href="#">Trusted sources</a>	Interfaces with federal and state entities to automatically verify volunteer registration information (credentials, licenses) with official databases
<a href="#">Settings</a>	Various other application and division settings, including registration instructions and email templates
<a href="#">Validation</a>	Robust tools for validating volunteers' credentials and managing and approving membership in groups

## Collaboration

Administrators can communicate easily with their volunteer populations in a number of ways, including:

- [Messages](#)
- [Notifications](#)
- [Calendar](#)
- [Document Management](#)

### Messages

Authorized administrators can post informational and emergency messages for the collections and groups they manage. These messages appear in the **Messages** area of the volunteer's *Home* page. The volunteer can click the message to view its details.

If the administrator adds the message at the collection level, the systems displays the message to every volunteer in any group in the collection. If they post it for a specific group, only volunteers in that group see the message.

## Notifications

When administrators perform specific actions or complete certain tasks within the application, the system automatically sends an email message to the appropriate participants. For example, when the administrator finishes validating a volunteer's credentials, the system automatically sends an email notification to the volunteer.

Administrators with the appropriate rights can also manually send notifications to volunteers. The workflow begins with a search for the types of volunteers needed. From there the administrator can send the communication to this set of volunteers via email.

See [Automated Notifications](#) for more information.

## Calendar

Authorized administrators can manage the calendars and entries (activities) for groups they manage. This includes adding, editing, and deleting activities.

Volunteers can use the calendar to view details about activities related to the group(s) they join. Any volunteer in that group can view their group's activities via the calendar on their *Home* page, and click an activity to view its details.

Calendar						
January 2011						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6 Business Continuity Planning	7	8
9	10 Volunteer Admin Training	11	12	13	14	15
16	17	18	19	20 Semi-annual Drill	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

When viewing the current month, the current date is lightly shaded in the calendar.


## Document Management


Volunteers can upload and store documents related to their registration and profile. For example, the volunteer can upload an image of a professional license. This information is also available to the volunteer's administrator.

In addition, administrators can upload files and documents to the volunteer's profile. These might include training and informational documents.

### Automated Notifications

When administrators perform specific actions or complete certain tasks within the application, the system automatically sends an email message to the appropriate participants. The following table lists the emails that the system sends automatically:

 Authorized administrators can revise the messages in each of these templates by accessing **Settings** (under the **Administration** menu).

 For the two expiration notifications mentioned in this table, the system also adds a task to that volunteer's **Tasks** section of the *Home* page.

Action	Subject (default email text)	Setting
Registrant submits a completed registration form Administrator enters all or part of a registrant's information in the form (including selecting at least one group for the registrant)	Thanks for Volunteering	New Volunteer
Administrator approves a registrant/volunteer's request to join a group Administrator rejects a registrant/volunteer's request to join a group Registrant or volunteer submits a request to join a group that does not require approval	Group Application Status	Approvals and Denials
Administrator enters all or part of a registrant's information in the form (including an email), and then invites the volunteer to access the application to review and/or complete the information	Please register as a user in our system	Invite Admin Managed Volunteer
A volunteer's credentials are nearing expiration (that is, 30 days prior to the date the volunteer specified)	Volunteer Credentials Nearing Expiration	Volunteer Credentials Nearing Expiration
A volunteer's credentials reach the expiration date	Volunteer Credentials Are Expired	Volunteer Credentials Are Expired
Administrator rejects a registrant or volunteer's registration form	Your Volunteer Account has been rejected	Reject Volunteer

## Customization

The nature of an emergency preparedness solution requires flexibility to handle the unknown circumstances and issues that arise during disasters. For this reason, your volunteer registration and management solution is highly customizable, placing control in the hands of your administrators.

### Registration

Each group can customize the information they collect so volunteers do not need to spend time sorting through questions that do not apply to their specific profession, skills, and credentials. This feature allows administrators to collect more detailed information while cutting down on the amount of time it takes volunteers to register, thereby simplifying the process for everyone involved.

See also [Registration](#) and [Forms](#).

### Local Control

All emergencies are local; it is when resources are exhausted that it becomes a State or a Federal emergency. With this in mind, the system clearly defines the actions that should be shared with external entities and participants, and those that should be exclusive to the application administrator(s).

The configuration options are based on the activities that are likely to vary from one region to another and change over time. These options include:

- Controlling numbers of [groups](#) and requirements for each group
- Customizing [forms](#) and questions unique to particular volunteers or groups, which also enhances [searching](#) for volunteers
- Building [messages and notifications](#)
- Configuring a variety of other [settings](#)

See also [Participants](#) and [Components](#).

## Forms

The application's **Form Builder** was designed as a flexible tool that can be used prior to and during emergency response efforts for planning, training, vulnerability assessment, and decision support.

Registration forms:

- Are [interactive](#)
- Can be [customized](#)

Furthermore, customization enhances [searching capabilities](#).

See also [Questions and Answers](#).

### Interactive

The registration process is interactive; the form displays questions based on the volunteer's selection of a groups they want to join, their specified profession, and their answers to previous questions.

For example, selecting the profession *Physician* exposes additional questions specific to that profession. Likewise, selecting a nonhealthcare profession, such as *Law Enforcement*, triggers the system to ask only those questions that are applicable to that profession.

## Customization

Administrators can customize their volunteer registration sites and processes for the groups they manage.

An administrator with the proper rights can tailor the registration form to the needs of their State, region, and/or group. This can reduce the amount of time it takes to register and increase the validity of the volunteer's information.

An administrator can also add questions to the form "on the fly" to answer needs that arise during management of an incident.

The administrator can do the following:

- Add sections and questions (fields) to the general information and profession-specific parts of their registration forms
- Limit a section/question to certain groups
- Specify the text (label) for each question
- Change the order of questions
- Specify whether the volunteer must answer a specific question
- Indicate whether a change to the answer forces the registration form to go through revalidation

In addition, an administrator can easily add a **Help** button to any question, so they can provide additional information or instruction. This can aid the registrant in providing complete and accurate information.

## Search

All customized questions can be included in searches for volunteers. For example, if an administrator wants to contact volunteers who are in the Red Cross, they can add the question and have volunteers respond to it. They can then perform a search to find those volunteers who indicate they are in the Red Cross.

See also [Customization](#).

## Questions and Answers

Your group's or organization's forms are highly customizable. The following sections provide information and hints on defining questions and their answers.

When adding a question:

- The administrator must associate the question to a specific collection or group.
- If adding the question at the group level, the administrator can add it to only one group at a time.
- The question is available on the registration form for any registrant attempting to join that group.

Read this topic to learn about:

- Question [attributes](#)
- [Types](#) of questions (and answers)
- [ESAR-VHP](#) questions

## Attributes

Setting up a new question requires defining the following attributes:

Field	Description
Label	Field label for the question that will appear on the registration form
Result Column Label	Column label when the field's question and value appear in a table; a shorter label consisting of one or two words
Help	Short description or set of instructions; user can click this to obtain additional information on the question/field
Required	Registrant or volunteer is required to answer this question in order to submit their registration
Initiates Validation	If an administrator or the user changes this question's value, the system automatically submits the volunteer's profile to the queue for validation
Validation Only	Field appears only to the administrator when they are validating the volunteer and verifying credentials  For example, the administrator needs to know whether an automated validation process failed or succeeded. The associated <b>Status</b> field appears in the volunteer's profile during the validation process. The registrant or volunteer does not see this field or its value. In addition, the administrator only needs to know this information during validation.

## Type

The options that are available to the registrant depend on the type of question you define. When entering a new question, the first step you take is to identify the type.

### Text or Date

If you specify:

- **Text Field**, a text field appears in the registration form, and the registrant can enter any text they want up to the maximum number of characters.
- **Date Field**, the field in the registration form allows the registrant to enter the date or select it from a calendar tool; the tools opens when the user clicks the question/field.

### Select and Answers

If you specify a **Select Field** or **Multi-Select Field**, you need to set up the answers (selections) for the question.


A registrant or volunteer can select one answer when you set up a **Select Field** question. They can select multiple answers when you set it up as a **Multi-Select Field**.

Your organization can [set up standard form answer lists](#). For example, for questions that require only **Yes** or **No**, your organization may have set up a standard "Yes-No" list that contains only those values.

As you define answers for **Select** and **Multi-Select** fields:

- You can select more than one list of predefined answers.
- You can select a defined **Answer List** and then add customized answers to it. For example, you select your standard "Yes-No" list and then add the answer **Uncertain**.
- You can specify the [order](#) of your customized answers in a **Select Field**. That is, if you specify three answers, you can indicate the order of those three answers. To specify the order of answers in a predefined list, see [Construct and Manage Form Lists](#).

---

 If a field/question does not have an **Up** and/or **Down** button next to it, you cannot change the order in which it appears in the form.

---

### Preferred

If you want an answer/value to appear at the top of the list of answers, select the **Preferred** check box next to it. This comes in handy when you know that most of your registrants are likely to pick from one or two specific answers.

For example, most of your registrants are residents of Valencia or Windsor counties. You select these counties as **Preferred** so they appear toward the top of the list of counties. In this way, registrants do not have to search through a long list to find the answer they are most likely to select. The balance of answers appear below the preferred options in alphabetical order.

### Default Form Lists

There are several default form lists, such as the default list of States. You cannot view these lists and their answers from the *Form Lists* administration page. Also, you cannot delete answers from these lists. However, when you add one of these lists to your question, you can specify answer preferences.

### ESAR-VHP

Your volunteer management and registration application is fully compliant with ESAR-VHP (Emergency System for Advance Registration of Volunteer Health Professionals). Compliance requires that certain questions, fields, and options be present in volunteer registration forms. In some cases, your volunteers are required to answer these questions before they can submit their registration.

Such questions include the volunteer's personal information, such as their first and last names and birth date. The base registration form also includes the following ESAR-VHP related items:

- Healthcare professions the registrant can choose from and the default questions associated with the profession they identify, including credentials, licenses, and degree information.
- The complete **Fit for Duty Survey**.

- Statements the volunteer must acknowledge and/or agree to, such as granting consent to the State to use the submitted registration information.

Only State administrators of this application can change this level of question in your registration form(s).

Authorized administrators can add Help text to these question. They can also add answers to the question. For example, the administrator may want to add one or more options to the **Profession** field. However, administrators cannot remove ESAR-VHP questions or the default answers within them.

## Incidents and Events

Within this system, "incidents" refers to both unplanned and planned incidents or events. When an administrator creates an incident, they must specify the type; these [types](#) include unplanned incident, planned event, and more.

A divisional administrator can view and work with incidents throughout the division. Group administrators can work with incidents with which their group has been associated.

## Searches and Results

Quickly finding the right volunteers during an emergency is critical for an effective response.

The application's robust searching feature gives administrators the freedom to search on any content in volunteers' profiles. Search criteria can be any combination of detail that volunteers have entered, including virtually any of the questions/fields and values their State or other administrator added to the registration profile/profession form. This allows administrators' searches to be as broad or as granular as needed.

The breadth of your search and its results depend on your level of administrative permissions:

- State/division administrator - View and search on all questions and answers for all groups
- Collection administrator - View and search on all questions and answers administered at the State level (name, birth date), and all questions and answers for the collection(s) they manage
- Group administrator - View and search on all questions and answers administered at the State level (name, birth date), and all questions and answers for the group(s) they manage

Read this topic to learn about:

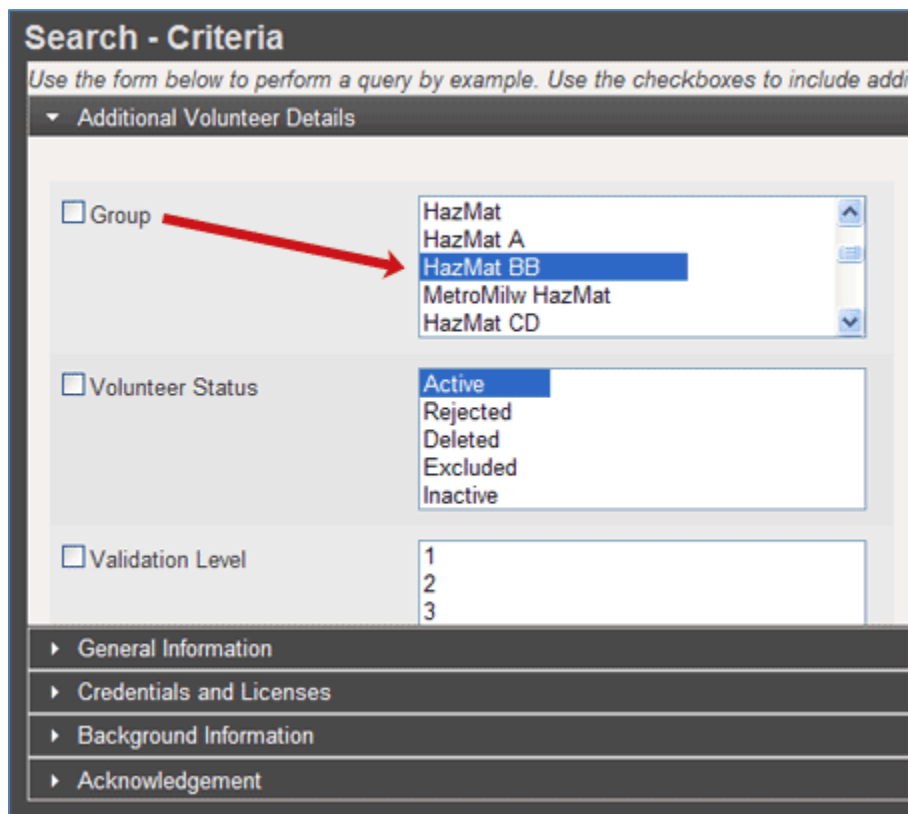
- Search [criteria](#)
- Search [results](#)
- Records with [expiring or expired credentials](#)

## Criteria

In addition to specifying criteria on which to search, you can specify the profile or profession data that should be included in the search results. That is, the information included in the results does not have to be limited to the criteria on which you searched. See the following examples for details.

## Example 1

By default, all collections and groups will be included in your search. In the following example, you want to search by a specific group. Select the group you want in the **Group** field.



The screenshot shows the 'Search - Criteria' form. At the top, it says 'Use the form below to perform a query by example. Use the checkboxes to include additional criteria.' Below this is a section titled 'Additional Volunteer Details' with a dropdown arrow. There are three main sections, each with a checkbox and a list of options:

- Group: A dropdown menu is open, showing the following options: HazMat, HazMat A, HazMat BB (highlighted in blue), MetroMilw HazMat, and HazMat CD. A red arrow points from the 'Group' checkbox to the 'HazMat BB' option.
- Volunteer Status: A dropdown menu is open, showing the following options: Active (highlighted in blue), Rejected, Deleted, Excluded, and Inactive.
- Validation Level: A dropdown menu is open, showing the following options: 1, 2, and 3.

At the bottom of the form, there are four expandable sections, each with a right-pointing arrow:

- General Information
- Credentials and Licenses
- Background Information
- Acknowledgement

Your search will be confined to the volunteers in **HazMat BB**.

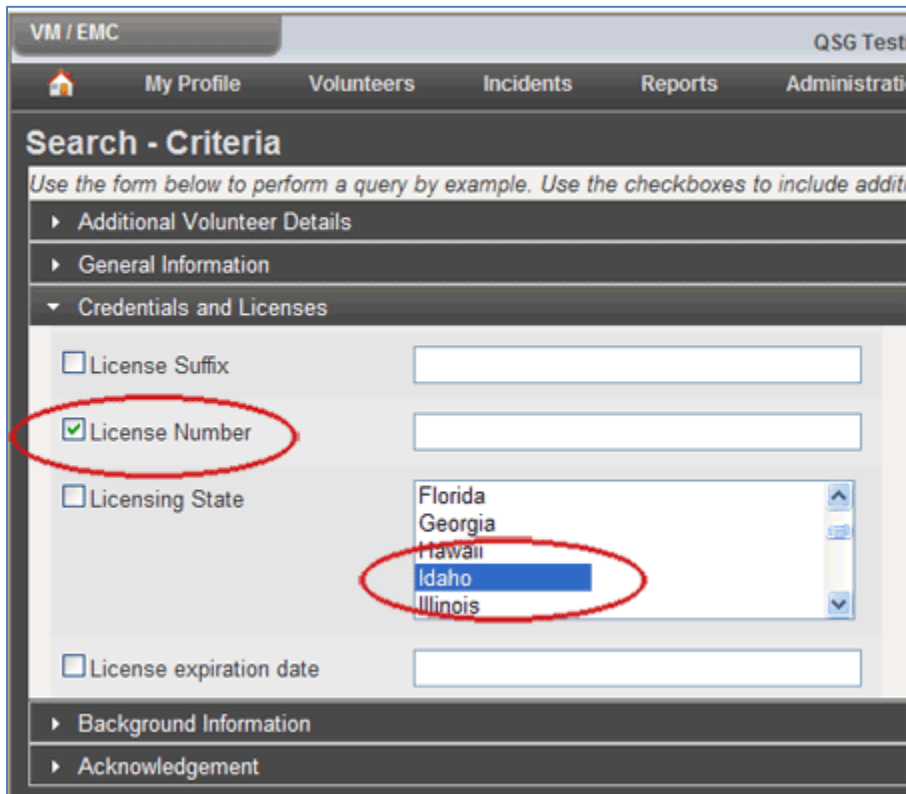
## Example 2

In this example, you want to search for volunteers who answered **Idaho** to the question **Licensing State**. You also want the search results to show you the **License Number**. That is, you **do not** want to confine your search to a license number, but you **do** want to include that number in your results. The results will include a column for the license number.

In this case, you:

- 1 Open the **Credentials and Licenses** drawer in the *Search - Criteria* page.
- 2 Select the check box to the left of the **License Number** field, which will include the information in the results.

### 3 Select **Idaho** in **Licensing State**.



VM / EMC QSG Test

My Profile Volunteers Incidents Reports Administration

## Search - Criteria

Use the form below to perform a query by example. Use the checkboxes to include additional criteria.


- ▶ Additional Volunteer Details
- ▶ General Information
- ▼ Credentials and Licenses
  - License Suffix
  - License Number
  - Licensing State
    - Florida
    - Georgia
    - Hawaii
    - Idaho**
    - Illinois
  - License expiration date
- ▶ Background Information
- ▶ Acknowledgement

Then click **Search**.

## Results

By default, the volunteer's name (first and last), professions/credential levels, groups, and volunteer status make up the columns in the *Search - Results* page. The **Action** column provides access to tasks you can perform for each volunteer.

---

 The volunteers that appear in your results depend on your role. For example, if you administer a collection, you will see more volunteers than an individual who administers one group within that collection.

---

The following illustration show the results of searching for volunteers whose **Licensing State** is **Idaho** and including their license numbers (Example 2, above) in the results. Review this illustration and the following table to learn more about the *Search - Results* page:

<input checked="" type="checkbox"/>	Name	Professions	Groups	Vol Status	License Number	Licensing State	Action
<input checked="" type="checkbox"/>	Amarillo, Gold	Physician [3]	E1,REG1,REG2,REC	ACTIVE	7837377373	Idaho	Action...
<input checked="" type="checkbox"/>	Navy, Blue	Registered Nurse [1]	HazMat BB,HazMat	ACTIVE	8888888	Idaho	Action...
<input checked="" type="checkbox"/>	Black, Gray	Licensed Social Work	HazMat BB,HazMat	ACTIVE	3344555	Idaho	Action...
<input checked="" type="checkbox"/>	Rojo, Blanca	Pharmacist [1]	HazMat A,REG1,REC	ACTIVE	3838383883	Idaho	Action...

Navigation: Page 1 of 1, 25 results per page, Total: 4

Number	Description
1	<p>In addition to the default columns, each criterion you search on will have a column in the results. In this example, you searched for volunteers based on the State of Idaho issuing the license, so the results include the <b>Licensing State</b> column.</p> <p>Furthermore, each question/field you did not search on but chose to include in the results will appear in a separate column. In this case, the results include the validation status (<b>License Number</b> column).</p> <p>You can sort the information by clicking any column header.</p>
2	<p>The page also includes buttons that allow you to perform a task based on all results that appear in the page. These include:</p> <ul style="list-style-type: none"> <li>• <b>Communicate With All</b> - Communicate with all volunteers in your search results. An email template opens, allowing you to specify the subject and message of the email.</li> <li>• <b>Refine</b> - Refine your search. The <i>Search</i> page re-opens and shows the criteria you selected previously. Add to or change your criteria and click <b>Search</b> again.</li> <li>• <b>As Excel</b> - Export your search results to a Microsoft® Excel file.</li> </ul>
3	<p>The options available to you in the <b>Action</b> column primarily depend on your role and its rights. That is, if you have been granted permission to validate volunteers you will see more options in the drop-down menu than someone whose rights include only communicating with volunteers.</p> <p>See also <a href="#">Navigation and Features</a>.</p>
4	<p>If your search yields more than a certain number of volunteer records, your results appear in multiple pages. Use the controls at the bottom of the page to:</p> <ul style="list-style-type: none"> <li>• Page through your results (arrows or enter the page you want).</li> <li>• Change the number of results that appear in a page.</li> </ul>

## Nearing Expiration/Expired

An administrator (with the appropriate level of rights) can easily search for volunteers who have expired credentials and those whose credentials will expire within a certain number of days from the current date.

Choose a value(s) in the **Expiring Dates Within** field in the **Additional Volunteer Details** drawer on the *Search - Criteria* page. Then click **Search**. The results will include any volunteer record that contains fields/questions that require validation and that will expire within the specified number of days. Furthermore, the results will show volunteers whose records contain already expired credentials.

Your volunteer management system also automatically lets you know about volunteers who have expired or soon-to-expire credentials. The system:

- Sends each volunteer an appropriate email message indicating the volunteer should review their registration information (30 days prior to expiration).
- Adds a task to the volunteer's task queue (*Home* page).
- Adds the appropriate task to the queue of that volunteer's administrator (*Home* page).

The system automatically recalculates the credential level for volunteers with expired credentials. These volunteers should not be deployed to events or incidents until their credentials have been revalidated.

## Settings

Depending on your level of permissions, you may be able to manage some or all of the following application/division settings:

Category	Setting Name	Description
Volunteer Help	Registration Instructions	Instructions that appear to registrants after they have entered their preliminary profile information.
	Welcome Message	Message that appears to registrants after they choose a Division to volunteer for.
	Rejection Message	Message that appears to a user who has been rejected (from volunteering or group membership) and attempts to log in to the application.
Divisional Setting	Contact Us Address	Hyperlink the registrant or volunteer can click to send an email message to the administrator. This hyperlink appears in the <i>Contact Information</i> dialog box (described below).
	Contact Information	Information that appears in the <i>Contact Information</i> dialog box when the registrant or volunteer clicks the <b>Contact Us</b> link in the upper right corner of the application page.
	Email Signature	Email signature that is appended to each email message the system or an administrator generates and sends to volunteers.
Email Template	Invite Admin Managed Volunteer	Message the administrator can send to a potential volunteer inviting them to register.
	New Volunteer	Message thanking the new volunteer for registering.

Category	Setting Name	Description
	Approvals and Denials	Message notifying the volunteer that their registration has been evaluated and providing the decision for each group (approval or rejection).
	Answers Nearing Expiration	Message indicating that an element (potentially a license) in the volunteer's profile is nearing expiration, and asking the volunteer to update their profile.
	Answers Expired	Message indicating that an element (potentially a license) in the volunteer's profile has expired.

## Trusted Sources

Your volunteer management solution currently verifies federal trusted source information automatically through the following databases:

- Drug Enforcement Agency (DEA)
- American Board of Medical Specialties (ABMS)
- Inspector General Status (IGO)
- American Osteopathic Association (AOA).

In addition, the system connects to numerous State sources, including nursing, physician, and pharmacy boards. For State trusted sources, you can choose to connect through a flat-file interface or through a web service interface.

Intermedix EMSystems staff will work with you to create and implement these interfaces.

## Validation

When a volunteer registers, administrators must validate their credentials and approve their request to join one or more groups.

An administrator's validation workflow can consist of the following two tasks:

- Validate registration form/credentials (profile, profession, license information) when:
  - Individual registers to be a volunteer and submits professional credentials
  - Volunteer registers for a new profession
  - Volunteer's credentials are about to expire or have already expired
- Approve/deny group membership when:
  - New registrant registers for a group
  - Existing volunteer registers for an additional group

Depending on your administrative role and rights, the **Form Validation** and **Group Approval** tasks can appear in the **Tasks** section of your *Home* page. This section indicates the number of registrants/volunteers that are queued up for each task, as well as the date of the most recent addition to the queue. When you access the task, you have the option to view both the registration information and the group requests.

## Administration


A different administrator may be responsible for form validation than for group approval. Therefore, registrants can be approved for a group before their credentials have been validated. If this occurs, that registrant is not yet a credentialed volunteer within the profession(s) they specified.

These individuals cannot serve in their specified profession since they are not yet credentialed. In other words, they can be assigned to transport casualties, but cannot serve as a physician until their credentials have been validated.

## Overview

The validation process includes the following key steps:

---

 The registrant/volunteer must specify an email address in their profile to receive the notifications listed in this process.

---


- Upon submitting their registration form, the volunteer's information goes into the validation queue. The system automatically sends an email notification to the registrant thanking them for registering. The email message includes a link and asks the registrant to click it to verify that this is their correct email address.
- Upon verification by trusted sources and completion of the administrator's review, the system calculates the volunteer's credential level. An authorized administrator can override this value and must provide a reason for doing so.
- When an administrator approves (or rejects) the volunteer's request to join a group, the system automatically notifies the volunteer via email.

## Revalidation/Reverification

When an existing volunteer does any of the following, their information goes into the validation queue for verification/reverification:

- Edits any portion of their profile that requires validation

---

 Administrators are responsible for indicating whether the fields/questions they add to the registration form will trigger revalidation when changed.

---

- Submits registration information for a new profession
- Submits a request to join a new group

The information goes back into the queue when an administrator edits any portion of the volunteer's profile that requires validation and/or approval.

## Validate Volunteers

An administrator's validation workflow can consist of the following steps:


- Validate registration form/credentials (profile, profession, license information)
- Approve/deny group membership
- View and/or update license/registration dates nearing expiration

Depending on your administrative role and rights, one or more of these validation tasks can appear in the **Tasks** section of your *Home* page:

- [Form Validation](#):
  - Individual registers to be a volunteer; review and validate/reject that volunteer's credentials
  - Volunteer registers for a new profession
- [Group Approval](#):
  - New registrant registers for a group you manage
  - Existing volunteer registers for an additional group, which you manage

The **Tasks** section may indicate the number of registrants/volunteers that are queued up for each task, as well as the date of the most recent addition to the queue. When you access the task, you have the option to view each individual's registration information and group requests.

---

 Since different administrators may be responsible for form validation than for group approval, registrants can be approved for a group before their credentials have been validated. If this occurs, that registrant is not yet a credentialed volunteer within the profession(s) they specified. These individuals can be deployed to an incident; however, they cannot serve in their specified profession until their credentials have been validated. In other words, they can be assigned to transport casualties, but cannot serve as a physician until their physician credentials have been validated.

---

## Validate: Volunteer Credentials

As an administrator, your [validation workflow](#) may consist of reviewing and validating (or rejecting) a volunteer's credentials. If you have the role/rights for this form of validation, the **Form Validation** task appears in your **Tasks** section on your *Home* page. In addition, when a volunteer's credential is about to expire, you will see the **Update Expired Dates** task in your queue.

The **Tasks** section indicates the number of registrants/volunteers that are queued up for credential validation, as well as the date of the most recent addition to the queue. When you access the task, you have the option to view both the volunteer's registration information and their group membership request(s).

Depending on your role, you may also have access to [group membership approval](#) tasks.

### To validate credential information

- 1 In the **Tasks** section of your *Home* page, click **Form Validation**.

The *Task Queue* page opens.


-or-

In the navigation bar, click **Volunteers > Validation**.

The *Task Queue* page opens.

- 2 In the left pane, click the registrant's row.  
The registrant's form opens in the right pane.
- 3 In the **General Information** drawer, review, edit, and/or verify the volunteer's personal and contact information.
- 4 Click the **Credentials and Licenses** drawer.


---

 Most standard sections within this drawer contain a **Notes** field in which the administrator can record relevant information, such as the individual who verified employment and so forth.

---

- a In each appropriate section, select the **Status**, and enter **Notes**, if appropriate.

---

 The **Status** for each credential must be set to **Success** for the volunteer to be assigned a credential Level 1.

---

- b Click **Save**.
  - c Repeat these steps for any additional drawers.
- 5 Click **Next**.  
The **Approvals for (registrant/volunteer)** pane opens on the right. The top section displays the system's automatically calculated credential **Level** for the volunteer.
  - 6 In the top section:
    - a Select the **Approve** check box to approve the registration form.
    - b If appropriate, override the system-calculated credential **Override Level**.
    - c If you overrode the level, enter a **Reason**.
  - 7 If you have the group approval right, you can proceed with that [task](#) by selecting the appropriate **Status** for each group.
  - 8 Click **Save Approvals**.

## Validate: Group Membership

As an administrator, your [validation workflow](#) may consist of reviewing and approving (or rejecting) a volunteer's requests for group membership. If you have the role/rights for this form of validation, the **Group Approval** task appears in your **Tasks** section on your *Home* page.

The **Tasks** section indicates the number of registrants/volunteers that are queued up for group membership approval, as well as the date of the most recent addition to the queue. When you access the task, you have the option to view both the volunteer's registration information and their group membership request(s).

Depending on your role, you may also have access to [volunteer credential validation](#) tasks.

### To approve/reject a volunteer for group membership

- 1 In the **Tasks** section of your *Home* page, click **Group Approval**.  
The *Task Queue* page opens.

- 2 In the left pane, click the volunteer's row.  
The volunteer's form opens in the right pane.
- 3 If appropriate, review, edit, and/or verify the volunteer's **General Information** and other information.
- 4 Click **Next**.  
The **Approvals for (registrant/volunteer)** pane opens on the right.
- 5 In the second section, approve or deny the registrant for each group by selecting the appropriate **Status** for each.
- 6 Click **Save Approvals**.

## Reject a Volunteer

An authorized administrator can reject a volunteer's:

- Registration (credentials and/or licenses)
- Group membership request

In addition to rejecting a volunteer during [validation/approval processes](#), you can search for a volunteer and reject their registration at any time, as outlined in the following procedures.


When you reject a volunteer in this way, they will no longer appear in any search results, and that individual will no longer be able to log into the application.

### To search for volunteers

You must first find the volunteer you want to reject.


- 1 Click **Volunteers > Search**.  
The *Search - Criteria* page opens.
- 2 Select or enter your search criteria in one or more drawers on the page.

---

 If you select options in a drop-down box, click outside the box to close it.

---
- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.

---

 You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---
- 4 Click **Search**.  
The *Search - Results* page opens.

### To reject a volunteer's registration

To reject the volunteer:

- 1 In the *Search - Results* page, click **Reject Volunteer** in the volunteer's **Action** column.  
The *Reject Volunteer* page opens. The page asks you to confirm that you want to reject the user account/registration for the volunteer.

- 2 Enter the **Reason**.
- 3 Click **Reject Volunteer**.  
Your *Home* page opens.


## Manage Volunteers/Users


One of the primary volunteer-related tasks is validating volunteer registrations. Validation includes validating a new registration (professional and credential information) and approving the volunteer for the group(s) they registered for. See [Validate Volunteers](#) for more information.

Many other management tasks begin with searching for the volunteers/application users. See the following procedures for instructions in these areas.

- [Search for volunteers](#)

---

 In general, the actions you can take are available in the **Action** column of the table in the *Search Results* page.

 For details on this application's powerful search feature, see [Searches and Results](#).

---

- [Edit a volunteer's profile](#)
- [Edit a volunteer's groups](#)
- [Manage a volunteer's documents](#)
- [Communicate with volunteers](#)
- [Invite a registrant or volunteer](#)
- [Edit a user's role](#)
- [Reject a volunteer](#)
- [Delete a user's account](#)

You can also:

- [Add a new volunteer](#)
- [Generate a Volunteer Summary Report](#)

## Create a Volunteer

While an individual can submit registration on their own, there may be occasions when an administrator needs to add the volunteer into the system. In general, the workflow is the same as the registrant experiences.


### To select groups

- 1 In the navigation bar, click **Volunteers > Create**.

The *Create New Registrant* page opens, as does the *Select Groups for New Registrant* dialog box.

- 2 As appropriate, select one or more groups in each **Collection**.


---


 Some collections may limit you to selecting only one group or allow the volunteer to join several. Other collections may require the volunteer to join at least one group.

---

- 3 Click **Save Groups**.

The dialog box closes.

 If you select a group that does not require validation of credentials, the registrant will receive an email indicating they are a member of that group. Keep in mind that an administrator still needs to approve that registrant's information before that individual becomes a volunteer.

 The application is highly customizable. Therefore, the sections and questions that appear in this page depend on your organization's configuration.


---

### To create a registrant with minimal information

You can enter **minimal information for the registrant**, rather than completing each step in the personal and professional information procedures below. Then you can invite the registrant to access the application in order to create their user account and complete their registration.

To do so:

- 1 In the *Create New Registrant* page, enter the registrant's first and last name.
- 2 Enter the registrant's email address.


 This is required for the invitation process.

---

- 3 Click **Submit**.
- 4 Go to the [invitation procedure](#), below.

### To enter personal and contact information

- 1 In the *Create New Registrant* page, click the **General Information** drawer.
- 2 Enter or select the registrant's **Birth Date**.
- 3 Answer the set of questions in the **Personal Information** section.

 At a minimum, you must supply the registrant's first and last name. If you want to invite the registrant to access the application, you must also supply an email address.

---


- 4 In the **Contact Emails** section, enter an **Email** address.
- 5 Complete any other sections.
- 6 Click **Save** if you are going to enter profession information for the registrant; otherwise, click **Submit**.

### To enter professional information

- 1 In the *Create New Registrant* page, click the **Credentials and Licenses** drawer.
- 2 Select a **Profession**.

The profession appears in the drawer header. If the profession calls for additional information, the page refreshes to show these fields.


- 3 Complete the appropriate sections on the page.

 If your selections call for additional information, the page refreshes to show the appropriate questions/fields.

---

- 4 Click **Save**.
- 5 To add another profession:
  - a Click **Add Another** at the bottom of the drawer.  
A new **Profession Information** drawer opens.
  - b Select a **Profession**.
  - c Complete the appropriate sections in this drawer.
- 6 If you want to add another profession, repeat the steps in 5, above.
- 7 If the page contains other profession-related drawers, click each and enter the appropriate information.
- 8 Open the **Background Information** drawer and complete the appropriate fields and section.

---


 This drawer contains the **Fit for Duty Survey** questions.

---
- 9 Open the **Acknowledgement** drawer and provide the appropriate answers and information.
- 10 Click **Submit**.  
The *Registration - Invite* page opens.

### To invite the volunteer to the system

In the preceding steps, you did not set up a username and password, and you may have entered minimal or no profession information. It is up to the individual volunteer to enter this information and thereby complete the submittal process. Therefore, the next step in the process is for you to invite the volunteer to the system.

---

 If you choose to bypass this step at this time, you can send the invitation at another time via the search results page.


---

- 1 In the *Registration - Invite* page, click **Invite**.  
The *Manage Documents* page for the volunteer opens.  
The system automatically sends an invitation to the volunteer to access the application.
- 2 If you have documents to upload for the volunteer, see [Manage a Volunteer's Documents](#).  
-or-  
Click **Done**.  
The *Home* page opens.

### Search for Volunteers

Several key tasks you perform as an administrator require that you first find the volunteer(s) that you need to manage.

You can [search for volunteers](#) using virtually any of the fields and values in their profiles, including those your organization added to the registration profile/profession form. In addition, you can easily [refine your search](#).

 The **Search** feature is a powerful tool that can point you to a specific volunteer's record or provide you with a complete list based on criteria in volunteers' profiles. See [Searches and Results](#) to learn more.

---

### To search for volunteers

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.


- 2 Select or enter your search criteria in one or more drawers on the page.
- 



If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.
- 

 You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To refine your search

You can easily refine your search from the *Search - Results* page. This comes in handy when your results are not quite what you expected, or you determine that you need to narrow or widen the scope of your search.

- 1 From the *Search - Results* page, click **Refine** toward the top of the page.

The *Search - Criteria* page re-opens, showing the criteria you selected for the search.

- 2 In each drawer, add to, remove, or change your selections, as appropriate.
- 3 Click **Search**.

The *Search - Results* page re-opens showing your refined results.

## Change a Volunteer's Password

An administrator can change/reset passwords for the volunteers they manage.

### To search for the volunteer

You must first find the volunteer.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.
- 




If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.

---

 You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To change a volunteer's password

- 1 In the *Search - Results* page, click **Change Password** in the volunteer's **Action** column.

The *Edit Change Password* page opens.

- 2 Enter the **New Password** and then enter it again in **Verify Password**.

- 3 Click **Save**.

A confirmation page opens indicating the password was changed successfully.

## Edit a Volunteer's Profile

Editing a volunteer's profile can include their contact information, profession and license details, and managing their documents (stored with their profile).

### To search for volunteers

You must first find the volunteer(s) you need to manage.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.


- 2 Select or enter your search criteria in one or more drawers on the page.
- 



If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.
- 

 You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To edit a volunteer's profile

- 1 In the *Search - Results* page, open the **Action** menu for the volunteer and click **Edit Registration**.

The *Edit Registration for (name)* page opens.

- 2 Make your changes within each drawer, as appropriate.

- 3 When you are done editing the profile, click **Submit**.

The volunteer's *Manage Documents* page opens.

If you want to upload or delete documents as part of your changes, see [Manage a Volunteer's Documents](#). Click **Done** if you want to skip this step.

The volunteer's record goes into the validation queue for revalidation of professional credentials.

You can also [edit a volunteer's groups](#).

## Edit a Volunteer's Groups

Editing a volunteer's groups can include removing the volunteer from a group or submitting a request for the volunteer to join a new group.

### To search for volunteers

You must first find the volunteer(s) you need to manage.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.
- 



If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.
- 



You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To edit a volunteer's groups

- 1 In the *Search - Results* page, click **Edit Registration** in the volunteer's **Action** column.

The *Edit Registration for (name)* page opens.

- 2 Click **Edit Groups**.

The *Edit Groups for (name)* dialog box opens.

- 3 Do one or both of the following, as appropriate:

- To add a group, select one or more groups in the collections.
- To remove the volunteer from a group, clear the selection.

- 4 Click **Save Groups**.

The dialog box closes.

- 5 Make your additions and changes within each drawer of the *Edit Registration* page, as appropriate.

- 6 When you are done editing groups, click **Submit**.

The volunteer's *Manage Documents* page opens.

If you want to upload or delete documents as part of your changes, see [Manage a Volunteer's Documents](#). Click **Done** if you want to skip this step.

The volunteer's record goes into the validation queue for validation of professional credentials and group approval.

You can also [edit a volunteer's profile](#) (without making any changes to their groups).

## Manage a Volunteer's Documents

You can view and manage a volunteer's documents, which are stored with the volunteer's profile.

### To search for volunteers

You must first find the volunteer(s) you need to manage.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.
- 



If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.
- 



You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To view and manage a volunteer's documents

- 1 In the *Search - Results* page, click **Manage Documents** in the volunteer's **Action** column.

The volunteer's *Manage Documents* page opens. The bottom left pane shows all documents uploaded to the volunteer's profile. It includes the file name, the date it was uploaded, and the user who uploaded it.

- 2 To view more detail, select the document in the bottom left pane.

The detail pane opens on the bottom right. Additional detail includes the file type and the document's description (if any).

- 3 To upload a document to the volunteer's profile:

- a In the top section of the *Manage Documents* page, click the **Browse** button.

The *Choose File to Upload* dialog box opens.

- b Locate the file you want to upload, and click **Open**.

The dialog box closes. The path to the file you selected appears in the **Choose File to Upload** field.

- c If appropriate, enter a **Description** for the file you are uploading.

- d Click **Upload**.


The page refreshes and the bottom panel shows the file you just uploaded, including its name and the date of upload.

- e To upload another file, repeat these steps.
- 4 To open a document:
  - a Select the document in the bottom left pane.  
The detail pane opens on the bottom right.
  - b In the right pane, click **View**.  
The document/file opens in the appropriate application.
- 5 When finished, click **Done**.

## Invite a Registrant or Volunteer

Registrant/volunteer information can be entered into this system (**Volunteers > Create**) without creating an application user account for that individual. Administrators (with the appropriate rights) can invite the registrant/volunteer to create a user account; they can do this when [entering that registrant's or volunteer's information](#), or at any time thereafter via the search results page. This topic covers the latter.

---

 An email address must be specified for the registrant in order for the administrator to have access to the invitation feature.


---

### To search for registrants/volunteers

You must first find the registrant in order to extend the invitation.


- 1 Click **Volunteers > Search**.  
The *Search - Criteria* page opens.
- 2 Select or enter your search criteria in one or more drawers on the page.

---

 If you select options in a drop-down box, click outside the box to close it.

---
- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.

---

 You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.  
The *Search - Results* page opens.

### To invite the registrant/volunteer to create a user account


To invite the registrant from your search results, in the *Search - Results* page, click **Invite** in the registrant's **Action** column.

The system sends the invitation to the registrant.

## Communicate with Volunteers

The application's search features helps you to identify the volunteers with whom you want to communicate. From the *Search - Results* page, you can communicate with a [single volunteer](#) (**Action** column) or [all volunteers appearing in your results](#). An example of the latter would be to search for all volunteers in a specific group; you can then easily communicate with members of that group by sending the message to your entire result set.

---

 Communications appear on the volunteer's *Home* page. If the volunteer has an email address, they will also receive the message via email.

---

### To search for volunteers

You must first find the volunteer(s) you want to communicate with.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.




If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.

---

 You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To communicate with a set of volunteers

To send an email message to all the volunteers in your search results:

- 1 In the *Search - Results* page, click **Communicate With All** toward the top of the page.

The *Communicate With Volunteers* page opens.

- 2 Enter the **Subject** of your message.
- 3 Enter the **Body**.
- 4 If appropriate, specify the **End Date**.



To set a message to "expire," set its **End Date** to the date you want the system to remove it from the volunteers' *Home* page.

---

- 5 Click **Submit**.

The system sends the email message to all volunteers in your search results list.

### To communicate with a single volunteer

- 1 In the *Search - Results* page, click **Communicate** in the volunteer's **Action** column.

The *Communicate With Volunteers* page opens.

- 2 Enter the **Subject** of your message.
  - 3 Enter the **Body**.
  - 4 If appropriate, specify the **End Date**.
- 



To set a message to "expire," set its **End Date** to the date you want the system to remove it from the volunteers' *Home* page.

---

- 5 Click **Submit**.

The system sends the email message to the specified volunteer.

## Edit a User's Role

An authorized administrator can change a [user's role](#) within the application. The following procedures describe how to perform this task by searching for and accessing the user's profile information.

---



You can also edit a user's role when [assigning that user or volunteer to be an administrator](#) for a group, collection, or filter.

---

### To search for volunteers

You must first find the volunteer whose role you want to edit.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.
- 



If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.
- 



You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To edit a volunteer's role

To edit a volunteer's role from your search results:

- 1 In the *Search - Results* page, click **Edit User Role** in the volunteer's **Action** column.

The *Edit User Role* page opens.

- 2 Select the role in the **Select a role for (user name)** field.
- 



The menu contains the three default [roles](#) (**Volunteer, Administrator, Limited Administrator**) as well as any that authorized administrators have added.

---

- 3 Click **Save**.

A confirmation page opens.

- 4 Click **OK**.

The *Home* page opens.

## De-activate a Volunteer's Account

There may come a time when you need to de-activate a volunteer registration and, thereby, their account. This can be due to a number of factors, such as the volunteer has indicated they have relocated to another State.

In these cases, you can de-activate the volunteer's account quite easily. Once you do this, the volunteer can no longer access this ESAR-VHP application.

### To search for the volunteer

You must first find the volunteer you want to de-activate.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.



If you select options in a drop-down box, click outside the box to close it.

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.



You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

- 4 Click **Search**.

The *Search - Results* page opens.

### To de-activate a volunteer's registration

- 1 In the Search - Results page, locate the volunteer and select **Deactivate** from the **Action** column.

The *Deactivate Volunteer* page opens, asking you to confirm this action.

- 2 Enter a **Reason**.

- 3 Click **Deactivate**.

A confirmation page opens. The system automatically sends an email to the volunteer informing them of the de-activation.

You can easily [reactivate the volunteer's account](#).

## Re-activate a Volunteer's Account

You can re-activate a volunteer's registration and application account. A volunteer may have de-activated their own account due to personal or professional concerns that prevented them from

volunteering for a time. When one of your de-activated volunteers contacts you, you can easily re-activate them.

### To search for the volunteer

You must first find the volunteer you want to re-activate.



When specifying search criteria, be certain to select **Inactive** in the **Volunteer Status** field (**Additional Volunteer Details** drawer).

---

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.
- 



If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.
- 



You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To re-activate a volunteer account

To send an email message to all the volunteers in your search results:

- 1 In the *Search - Results* page, click **Re-activate** in the volunteer's **Action** column.

The *Re-activate Volunteer* page opens. The page lists the reason the account was de-activated and asks you to confirm re-activation.

- 2 Click **Re-activate**.

A confirmation page opens. The system automatically sends an email to the newly re-activated volunteer.

## Delete a User's Account

An administrator who has been granted the appropriate right can delete a volunteer's/user's account in this application. Thereafter, that user cannot be deployed to an incident and no longer has access to the application.

### To search for volunteers

You must search for the user (volunteer) before you can delete their account.

- 1 Click **Volunteers > Search**.

The *Search - Criteria* page opens.

- 2 Select or enter your search criteria in one or more drawers on the page.



If you select options in a drop-down box, click outside the box to close it.

---

- 3 If you want the search results to include particular profile details, select the check box to the left of each field label.
- 



You can include questions/fields in the search results page without including those questions/fields as search criteria. See [Searches and Results](#).

---

- 4 Click **Search**.

The *Search - Results* page opens.

### To delete the account

- 1 In the *Search - Results* page, click **Delete Account** in the volunteer's **Action** column.

The *Delete User Account* page opens; the page contains a warning that, if you proceed, the user/volunteer will no longer have access to the application.

- 2 To continue, click **Delete**.

## Generate Volunteer Summary Report

Authorized administrators can generate a summary report of volunteers. In the report, the top pane shows the breakdown by profession, credential level in that profession, and registration status. The bottom pane summarizes all professions by credential level and status.

Click a column header to sort by that column.

### To generate summary by profession report

- 1 In the navigation bar, click **Reports > Summary by Profession**.

The *Volunteer Summary Report - Choose Groups* page opens.

- 2 Select one or more **Groups**.

The default is all groups.

- 3 Click **Next**.

The *Volunteer Summary Report - Results* page opens.

### To export the report

To export the report:

- 1 After generating the report, click **As PDF** or **As Excel**.

The *File Download* dialog box opens.

- 2 Click **Open** or **Save**, as appropriate.

- If you clicked **Open**, the report opens in a new window.
- If you clicked **Save**, the *Save As* dialog box opens so you can specify a location and name for the exported report.

## Generate Summary By Choice Report

Authorized administrators can generate a summary report based on the choices their volunteers made in various registration form questions/fields. In the report, the top pane shows the breakdown by profession. Each possible answer to the question or available option for this field appears in its own column. The answer/option columns show the number of volunteers in each profession who selected that option.



If there are a number of options/choices for the question/field, the report may contain a horizontal scroll bar you can use to view all columns and options.

---

The bottom pane summarizes the number of volunteers that chose each option (from all professions).

Click column headers to sort the list.

### To generate a summary by choice report

- 1 In the navigation bar, click **Reports > Summary by Selected Field**.  
The *Volunteer Summary By Choice Report - Make Selections* page opens.
- 2 Select one or more **Groups**.  
The default is all groups.
- 3 Select the appropriate value in **Choice Field**.



You can choose from virtually any field in the registration form. The section or drawer in which the field resides appears before the field or question.

---

- 4 Click **Next**.  
The *Volunteer Summary By Choice Report - Results* page opens.

### To view volunteers

To view the volunteers in that profession, click the profession's name in the first column (in the table on top) or **All Professions** (in the summary table at the bottom). The *Search Results* page opens to show the volunteers in that profession or all professions.

The number in each option column is a link to a list of the volunteers in that profession who chose that option. To view these volunteers, click the number in the option column. The *Search Results* page opens to show the volunteers in that profession/all professions who chose that specific option.



For the column to be a link to a list of volunteers, the value must be greater than zero.

---

### To export the report

To export the report:

- 1 After generating the report, click **As Excel**.  
The *File Download* dialog box opens.
- 2 Click **Open** or **Save**, as appropriate.
  - If you clicked **Open**, the report opens in a new window.

- If you clicked **Save**, the *Save As* dialog box opens so you can specify a location and name for the exported report.

## Manage an Incident

After creation of an incident, the incident dashboard is available to authorized personnel for viewing the current status, and for viewing recent incidents, modifying details, and managing volunteers, locations, and files. This dashboard provides access to tasks your staff may need to perform throughout the duration of the incident.

If you just created the incident, upon clicking **Create Incident** you will be viewing the incident's dashboard. Otherwise, you can access the incident's dashboard from any page by clicking **Incidents > Incidents**. Locate and select the incident, and click **View Details**.

The dashboard provides access to a number of tabs, each of which provides access to views, features, and functions you may need throughout the incident. For more information, see [Incident Dashboard](#).



Press **F5** to refresh information in the incident dashboard. This reloads the information for this incident without refreshing the entire application.

---

### Summary Tab

This tab shows the details for the incident, such as its name, type, site, and more. Much of this information was specified when an authorized user created the incident in this application. You can [edit some of this detail](#). You can also [end the incident](#) from this pane.

### Features

This part of the volunteer management Help system provides a number of procedures that are or can be part of managing an incident. As managing an incident can involve many tasks, the application offers them grouped by the tabs that appear toward the top of this dashboard. Click the tab name to view its features and information:

- [Incident Dashboard](#) - Provides access to various tabs and features, including locations and volunteers.
- [Locations](#) - View and add locations for the incident, such as parking, triage centers, and temporary housing.



The incident **Site** is the general site of the incident itself, such as a multiple car pile-up at **Junction of Highways X and Y**. **Locations** for the incident would be areas to which volunteers can be assigned, such as **Check in, Triage, First Aid**, and so forth.



When an incident is created, a default location is created with the name **Unassigned**. The system automatically assigns this location to a volunteer when they indicate they are en route to the incident. Upon checking the volunteer in, the administrator or designated volunteer can change the location, as appropriate.

---

- [Volunteers](#) - View volunteers associated with this incident by their current status.
- [Files](#) - View files associated with the incident.


- [Check In/Out](#) - Check a volunteer in to the incident (they are onsite), and check them out (they have worked their shift and/or the incident is over).


## View Incidents and Events

Volunteers who have been associated with an incident will see a notification in the **Messages** section of their *Home* page. Clicking the incident opens a summary.

In addition, volunteers and administrations can view a list of current and ended incidents/events at any time via the **Incidents** menu. The *Incidents and Events* page shows each [incident's type](#) (such as unplanned incident or drill), name, site or location, and the date it started.

---

 Multiple incidents/events can have the same name. To distinguish between incidents, view each incident's summary and/or details.

 You can only view incidents with which you are (or have been) associated on some level.

---

### To view from the Home page

Click the message in the **Messages** section.

A dialog box opens, showing a summary of the event. The information in this dialog will be essentially the same as the associated notification (email) you received.

### To view via the Incidents menu

- 1 In the navigation bar, click **Incidents > Incidents**.  
The *Incidents and Events* page opens, showing the list of current (in progress) incidents and events.
- 2 To include the incidents and events that have ended, select the **Show all ended events** check box.  
The page refreshes; the left pane shows all current and ended incidents and events.
- 3 To view a summary of an incident or event, in the left pane locate and select it.  
The right pane shows a summary of the incident.  
The top portion shows the incident **Type**, its site, and start date and time. The **Volunteers by Status** section shows the numbers of volunteers currently in the indicated states.
- 4 To view and print a [record of your participation](#) in this incident:
  - a Click **My Incident History**.  
The record opens in a new browser.
  - b If appropriate, click **Print**.
  - c Close the browser window.
- 5 If you are an administrator, you can click **View Details** in the right pane to [open the incident's dashboard](#).

## Incidents/Events List

You can view a list of incidents and events with which you are associated. For example, if a group you joined is associated with an incident, it will appear in the *Incidents and Events* page.

To view this page, point to **Incidents** in the navigation bar and select **Incidents** from the drop-down menu.

See the following sections for details on the [list](#) (left pane) and [summary](#) (right pane) in this page. The list section also provides details on incident [types](#).

## List

The left pane shows the list of incidents:


Status	Type	Name	Site	Start Date
●	Incident	Tornado	Cunningham Road	25 May 2011
●	Incident	Fire	AAA Medical Center	25 May 2011

Show all ended incidents Create Incident...

Note the following about the features in this pane:

- The **Status** column indicates the incident is active (green ball) or ended (red ball).
- When an individual creates an incident they must specify a **Type**. The following table lists and describes the available types:

Type	Description
Incident Unplanned incident	Emergency or disaster occurred for which actionable response is required
Event Planned event	Event that occurs on a specific date(s) for which volunteers can be mobilized, such as marathons, Mardi Gras celebrations, and so forth
Drill	Planned event at which administrators and volunteers (usually a designated set) exercise their emergency response and volunteer mobilization processes; these can range from a walk-through of an evacuation route to full-scale exercises, simulating an incident as closely as possible
Training	Regularly scheduled sessions to train administrators and volunteers on mobilization processes; training can include drills

 For each type that is created, the volunteer management system creates an [incident dashboard](#) for tracking purposes.

- The **Incident Site** is the general site of the incident itself.

For example, a multiple car accident at **Junction of Highways X and Y**. The site is comprised of one or more [locations](#), which are specific areas to which volunteers can be assigned, such as **Check in, Triage, First Aid**, and so forth.

- Select the **Show all ended incidents** check box to view both active and ended incidents in the list.
- Click **Create Incident** to [start a new incident](#).

Click a column header to sort by that information. For example, clicking **Name** will sort the list alphabetically (in ascending order) by **Name**. Click the header again to sort by **Name** in descending order.

## Summary

Click an incident in the left pane to show its summary in the right pane:



The screenshot displays the summary for an incident titled "Fire". At the top right is a "View Details" button. Below the title, a green circle indicates the incident is "Active". The summary includes the following details:

- Type: Unplanned Incident
- Group: QSG Division Group
- Incident Site: AAA Medical Center
- Start: 25 May 2011 11:56 CDT
- End:
- Contact: Verde Greene (414-555-0005)

A description of the incident follows: "Fire has broken out on the fifth floor of the Center". Below this is a "My Incident History" button. At the bottom, a section titled "Volunteers by Status" shows the following counts:

Volunteers by Status	
0 Response Pending	0 On Duty
0 Accepted	0 Off Duty
0 Confirmed	0 Active
0 Stand by	

The top portion shows the incident **Type**, its site, and start date and time. The **Volunteers by Status** section shows the numbers of volunteers currently in the indicated states.

You can also:

- Click **View Details** to view the [incident's dashboard](#).
- Click **My Incident History** to view a record of your participation in this incident.

See [View Incidents and Events](#) for more information.

## Create an Incident

Divisional and group administrators can create incidents, including unplanned incidents and planned events, such as drills, exercises, and training sessions. A divisional administrator can create incidents throughout the division. Group administrators can create incidents for their group(s).

Upon creating the incident, a dashboard opens. Administrators use this to manage the Incident or event. It includes tabs for **Locations**, **Files** to associate with the incident, and the ability to check volunteers in and out of the incident or event.

### To create an incident

- 1 In the navigation bar, click **Incidents > Create Incident**.

-OR-

Point to **Incident** in the navigation bar, click **Incidents**, and then click the **Create Incident** button.

The *Create Event* page opens.

- 2 Enter the **Name** of the incident or event.
- 3 Select the incident **Type**.



See [Incidents/Events List](#) for more information.

---

- 4 Select a **Group** for the incident.
- 5 Enter the **Incident Site**.



The **Incident Site** is the general site of the incident itself, such as a multiple car accident at **Junction of Highways X and Y**. The site is comprised of one or more **Locations**, which are specific areas to which volunteers can be assigned, such as **Check in, Triage, First Aid**, and so forth.

---

- 6 Indicate the **Time Zone** in which the incident or event is occurring or will occur.
- 7 Enter or select the **Start Date** and **Time**.
- 8 If available, enter a **Contact Name** and **Contact Phone**.
- 9 If appropriate, enter a **Description**.
- 10 Click **Create Incident**.

The incident dashboard opens.

See [Manage an Incident](#) for more information on using the tabs in the dashboard.

## Open an Incident Dashboard

To open an existing incident's dashboard, do the following:

- 1 In the navigation bar, click **Incidents > Incidents**.

The *Incidents and Events* page opens, showing the list of current (in progress) incidents and events.

- 2 Locate and select the incident in the left pane.

The right pane shows a summary of the incident.

- 3 Click **View Details**.

The incident's dashboard opens.

## Incident Dashboard

When you first enter the incident's dashboard, the **Summary** tab is in focus.



Press **F5** to refresh information in the incident dashboard. This reloads the information for this incident without refreshing the entire application.

---

The dashboard provides access to a number of tabs, each of which provides access to views, features, and functions you may need throughout the incident. You and your staff may not need to use all tabs/tasks for every incident or event.

Read the following sections to learn about:

- [Summary tab - administrator](#)
- [Summary tab - volunteer](#)
- [Panels](#)

For details on the other tabs in the dashboard, see the following:

- [Locations](#)
- [Volunteers](#)
- [Files](#)
- [Check In/Out](#)



Volunteers who are assigned [supervisor or check-in registrar roles](#) have access to more features than a volunteer with basic access.

---

## Summary Tab - Administrator

In the **Summary** tab, each pane shows a different set of information about the incident. See the illustration and table below for more information. This illustration shows an administrator's view of the incident dashboard.

Number	Description
1	<b>Incident Summary</b> - The top of the left pane shows the name of the incident, and also provides access to editing the details of the incident, and ending the incident.
2	<b>Incident Summary</b> - The left pane also shows the summary information for this incident, including its <a href="#">type</a> (unplanned or planned), the site, its start date and time, and contact information.
3	<b>Volunteers by Status</b> - This section shows volunteer metrics--that is, the number of <a href="#">volunteers by their status</a> . That is, it will tell you at a glance how many potential volunteers you are waiting to hear from (about their availability), how many are confirmed (the administrator confirmed their mobilization) how many are on and off duty, and more.  This is not available for volunteers with <a href="#">basic incident access</a> .  Each number/status is a link. Clicking a link opens the <b>Volunteers</b> tab to show you the volunteers currently in the selected status.
4	<b>My Incident Status</b> - This section shows your own status for this incident, including your contact information and location.

## Summary Tab - Volunteer

The following illustration shows the **Summary** tab for a volunteer. Volunteers with basic incident access does not see tabs and features that they do not need during the incident.

## Left and Right Panes

Other dashboard tabs contain a left and right pane. In general, the left pane contains a list. Clicking an item in the list shows its details in the right pane.

For example, click the **Volunteers** tab in the dashboard. The left pane shows the volunteers in the currently selected **Status** at the indicated **Location**; it includes the volunteer's name, profession / credential level, and their ETA (estimated time of arrival). Clicking a volunteer in the list shows that volunteer's details in the right pane, as shown below:

Use the buttons in the right pane to perform related actions.

## Locations

When working in the incident dashboard, you can add or change locations associated with the incident or event, as well as add, edit, or delete assignments associated with each location. An authorized administrator or supervisor can:

- View a [location's details](#)
- View a location's current [staffing](#)
- [Add](#) a location
- [Edit](#) a location



To deactivate a location and make it unavailable for this incident, clear the **This location is active** check box when you edit the location. You cannot deactivate a location to which volunteers have been assigned.

- 
- Work with [assignments](#) (add, edit, delete)



The incident **Site** is the general site of the incident itself, such as a multiple car pile-up at **Junction of Highways X and Y**. **Locations** for the incident would be areas to which volunteers can be assigned, such as **Check in, Triage, First Aid**, and so forth.



When an incident is created, a default location is created with the name **Unassigned**. The system automatically assigns this location to a volunteer when they indicate they are en route to the incident. Upon checking the volunteer in, the administrator or designated volunteer can change the location, as appropriate.

---

## Access

Go to the incident's dashboard and click the **Locations** tab.

## Features

### To view location details

When you first open the **Locations** tab, the left pane shows all locations specified for this incident. To include inactive locations in the list, select the **Show inactive** check box in the left pane.

To view a location's details, select it in the left pane and then select the **Location Details** drawer in the right pane. The details include the location's type and address, and whether the location is active.

### To view location staffing

Click the **Location Staffing** drawer (in the right pane) to view current assignments, whether the assigned volunteers are on or off duty, the number needed (requested) for the assignment, and the number unfilled. The system automatically updates these numbers as volunteers are checked in and out and assigned or unassigned. The tab allows you to add, edit, and delete assignments for this location.

## To add a location

To add a location to this incident:

- 1 In the left pane, click **Add Location**.  
The *Add Location* dialog box opens.
  - 2 Enter the location **Name**.
  - 3 Select its **Type**.
  - 4 Enter its address.
  - 5 Select or clear the **This location is active** check box, as appropriate.
- 



To be able to assign volunteers to the location, this check box must be selected.

---

- 6 Click **Save**.  
The dialog box closes and the new location appears in the left pane.

## To edit a location

To edit an existing location:

- 1 In the left pane, select the location you want to edit.
  - 2 Click the **Location Details** drawer.  
The right pane shows the location's details.
  - 3 In the right pane, click **Edit Details**.  
The *Location Details* dialog box opens.
  - 4 Make your changes.
- 



To deactivate a location and make it unavailable for this incident, clear the **This location is active** check box. You cannot deactivate a location to which volunteers have been assigned.

---

- 5 Click **Save**.

## To work with assignments

To work with assignments for the location:

- 1 In the left pane, select the location.  
Its details appear in the right pane.
- 2 Click the **Location Staffing** drawer.
- 3 To add an assignment:
  - a Click **Add Assignment**.  
The *Create Location Assignment* dialog box opens.
  - b Select the **Assignment**.  
-or-  
Select **new** in **Assignment** and then enter the **New Assignment** name.

- c Enter the number of volunteers needed for this assignment (**# of Requested Volunteers**).
- d Click **Save**.

The dialog box closes and the right pane shows the new assignment.

- 4 To edit an assignment:
  - a Select the location in the **Location Staffing** drawer.
  - b Click **Edit Assignment**.

The *Edit Location Assignment* dialog box opens.

- c Make your changes.
- d Click **Save**.

- 5 To delete an assignment:

- a Select it in the drawer.
- b Click **Delete Assignment**.

A dialog box opens asking you to confirm the deletion.



You cannot delete an assignment if any volunteers are assigned to it.

---

- c Click **Yes**.

## Volunteers

Authorized administrators and Staff Supervisors can easily view the volunteers associated with the incident or event, including those on and off duty, on standby, and more.

### Access

Go to the incident's dashboard and click the **Volunteers** tab.

### Features

#### To view volunteers

When you first open the **Volunteers** tab, the left pane shows the volunteers who meet the criteria specified at the top of the tab. Use the **Status** and **Location** fields to specify the set of volunteers you want to view for this incident or event. For example, to view all volunteers currently on standby for the incident, select:

- **Stand by** in **Status**, and
- **All Locations** from the **Location** field.

For more information on statuses, see [Volunteer/Incident Status](#).

The left pane shows the volunteers who meet the criteria you specified. It lists their names and professions.

If this yields a large number of volunteers, use the page controls at the bottom of the pane to page through the list.

To view a volunteer's details, select their row in the left pane. The right pane shows the volunteer's status, location, and check in/out status.

## Other Actions

Use the buttons in the right pane to do the following:

- [Generate a participation report](#)
- [Accept or decline the mobilization request](#)
- [Edit a volunteer's contact information](#)
- [Confirm a volunteer](#) or [place the volunteer on standby](#)
- [Deny the volunteer or cancel the mobilization request](#)
- [Check a volunteer in or out or change their duty status](#)
- [Change a volunteer's location/assignment](#)

## Files

You can associate files with an incident or event, and then view or delete these files.

### Access

[Open the incident's dashboard](#) and click the **Files** tab.

### Features

#### To view files

When you first open the **Files** tab, the left pane shows the files associated with this incident. To view details of the file, click it in the left pane. The details appear in the right pane.

#### To add a file

- 1 In the left pane, click **Add File**.  
The *Add file* dialog box opens.
- 2 Enter the path and file name in **Choose File to Upload**.  
-OR-
  - a Click **Browse**.  
The *Choose File to Upload* dialog box opens.
  - b Locate and select the file.
  - c Click **Open**.  
The *Choose File to Upload* dialog box closes.
- 3 If appropriate, enter a **Description**.
- 4 Click **Save**.  
The *Add file* dialog box closes and the file appears in the Files tab.

#### To open or save a file

To view a file:

- 1 In the left pane, select the file.

The right pane shows its details.

- 2 Click **View**.
- 3 Select **Open** or **Save**, as appropriate.

### To delete a file

To delete a file:

- 1 In the left pane, select the file.  
The right pane shows its detail.
- 2 Click **Delete File**.  
A dialog box opens asking you to confirm the deletion.
- 3 Click **Yes**.

### Check In/Out

You can use the **Check In/Out** or **Volunteers** tab in the incident's dashboard to check volunteers in to and out of the incident.

The individual serving as the Check-In Registrar may find it easier to use the **Check In/Out** tab, especially if there is no other volunteer information they need to change for the volunteer.

When you check in a volunteer, the system changes their status from **Confirmed** to **On Duty**, if you put the volunteer on duty immediately, or **Off Duty** if you did not.

### Access

[Open the incident's dashboard](#) and click the **Check In/Out** or **Volunteers** tab.

Use the following procedures to:

- [Check volunteers in](#)
- [Change a checked in volunteer's status to on or off duty](#)
- [Check volunteers out](#)

### Features


#### To check in volunteers

- 1 Click the **Check In/Out** tab and enter the name or ESAR-VHP ID of the volunteer you are checking in (the **Enter Volunteer name or ESAR-VHP ID** field), and click **Search**.  
-OR-
  - a Click the **Volunteers** tab.  
The tab opens.
  - b Select **Confirmed** in **Status**.
  - c Select **All Locations** in **Location**.
  - d In the left pane, select the volunteer.
  - e In the right pane, click **Check In**.

The *Check In Volunteer* dialog box opens. The volunteer's name appears toward the top of the dialog box. The current date and time appear in the **Arrived on scene** and **Time** fields.

- 2 Enter the time the volunteer left their home based in **Time** (to the right of the **Departed home base** field).

---


 ETA stands for estimated time of arrival. Enter the time in 24-hour (also known as military format). For instance, 10 AM is 10:00, and 3:00 PM is 15:00 (12 hours + 3 hours).

---

- 3 If you need to, change the date and time of arrival (**Arrived on scene** and **Time**).
- 4 Enter the volunteer's contact information.
- 5 Clear or select the **Put volunteer on duty immediately** check box, as appropriate.
- 6 To assign the checked in volunteer (or change the volunteer's assignment):
  - a Click **Change Assignment/Status**.

The *Change Volunteer Location/Assignment* dialog box opens.
  - b Select the level of authorization for the volunteer for this incident (**Incident Permissions**).

---

 This does not affect the volunteer's permission level in the application as a whole. It applies to this incident only.

---

- c Select the appropriate **Location/Assignment** row in the table.
- d Click **Save**.

The *Change Volunteer Location/Assignment* dialog box closes. The assignment information changes in the *Check In Volunteer* dialog box.

- 7 Click **Check In**.

The *Check In Volunteer* dialog box closes. A confirmation message appears briefly in the **Check In/Out** tab, and then disappears so that you can check in the next volunteer.

### To change a checked in volunteer's status

To put a volunteer on duty or put them in an off duty status, do the following:

- 1 Click the **Volunteers** tab.

The tab opens.
- 2 Select **Confirmed** or **On Duty** in **Status**.
- 3 Select **All Locations** in **Location**.
- 4 In the left pane, select the volunteer.
- 5 In the right pane, click **On Duty** or **Off Duty**.

The volunteer's status changes.

### To change a checked in volunteer's status

To check out a volunteer from the incident:

- 1 Enter the name or ESAR-VHP ID of the volunteer you are checking out (the **Enter Volunteer name or ESAR-VHP ID** field), and click **Search**.

-OR-

- a Click the **Volunteers** tab.

The tab opens.

- b Select **Confirmed** or **On Duty** or **Off Duty** in **Status**.
- c Select **All Locations** in **Location**.
- d In the left pane, select the volunteer.
- e In the right pane, click **Check Out**.

The *Check Out Volunteer* dialog box opens. The volunteer's name appears toward the top of the dialog box. The current date and time appear in the **Check out date** and **Time** fields.

- 2 Enter/change the date and time the volunteer checked out of the incident (**Check out date** and **Time**).
- 3 Click **Check Out**.

## Mobilize Volunteers

An authorized administrator can easily mobilize volunteers from anywhere in the incident dashboard. You can mobilize a set of volunteers or an individual. First, you search for the volunteers, using any criteria from their registration information, as well as additional information, such as groups, status, and validation level.

The **Mobilize Volunteers** button appears toward the top of the dashboard on the right side of the page.



If you mobilize a volunteer more than once for the same incident, any previous mobilization requests that have a **Response Pending** [status](#) will be canceled.

---

See the following for information on [mobilizing volunteers](#) and also mobilizing volunteers who are currently [on standby](#).



**Search** facilitates mobilization. You can pinpoint a set of volunteers based on virtually any information in their profiles. For example, in the **Acknowledgment** drawer, you can select **up to 100 miles** in **Travel Distance Preference** and click **Search**. The results will show volunteers who indicated they would prefer to travel no more than 100 miles for an incident.

---

### To mobilize volunteers

- 1 [Open the incident's dashboard](#).
- 2 Click the **Mobilize Volunteers** button.

The search page opens, allowing you to search for the particular volunteer or set of volunteers you want to mobilize.
- 3 Select your criteria in one or more drawers of the search page.
- 4 Click **Search**.

The search results page opens. By default, all volunteers who match your search criteria are selected.



If your results are not what you wanted or expected, you can click **Refine** to go back to the search page to add or change your search criteria.



When searching for volunteers to mobilize, the results will not include those who are already at the incident. It will also exclude any volunteers who have not been validated and approved.

- If appropriate, add or change volunteers to mobilize by clearing or selecting their check boxes (first column).



Select the check box in the table header (first column) to clear or select all volunteers in your search results.

- Click **Next**.

The *Select options for mobilizing volunteers* page opens.

- As appropriate, do one or more of the following:

Check box / field	Description
Request "estimated time of arrival" (ETA) from Volunteers	Select to request an estimated time of arrival (ETA) from the volunteer; this appears in the mobilization request. If you do not want to know an ETA, clear this check box.
Mobilization Criteria	Enter any additional information the volunteer may need to know when they make their decision about their availability. For example, specify that their tetanus shot must be up to date.
Special Instructions for Volunteers	Enter any special instructions, such as the location to check in, tools or supplies to bring, and so forth.

- Click **Send Mobilization**.

The incident dashboard re-pens. The system sends an email message to each volunteer requesting their availability for the incident. This message contains the mobilization criteria and/or special instructions you entered (if any) and a link to the page where the volunteer can [indicate their availability](#).

### To mobilize volunteers on standby

You can easily mobilize a volunteer who is on standby for this incident.

See also [Volunteer/Incident Status](#).

- [Open the incident's dashboard](#).
- Click the **Volunteers** tab.  
The tab opens.
- Select **Stand by** in **Status**.
- Select **All Locations** in **Location**.
- In the left pane, select the volunteer.

The right pane shows an overview of the volunteer.

- 6 In the right pane, click **Confirm**.

The system changes the volunteer's status of **Confirmed**.

## Respond to Mobilization Request

When a volunteer receives the mobilization request, they can click the link in the email message, which opens a page where they can immediately indicate their availability for this incident. The volunteer can also respond by clicking the appropriate **Task** link on their *Home* page.

The page shows the summary of the incident in the left pane, and then lists the options the volunteer has for responding in the right pane.

You can respond:

- Directly via the [email message](#)
- From within the [application](#)

### To respond via the request message

- 1 Click the link in your email message.

The *Respond to Mobilization Request* page automatically opens in your browser.


- 2 In the **Volunteer Response** pane, do one of the following:

If you are not available, select **No**.

-OR-

- a If you are available, select **Yes**.
- b Enter your **ETA Date** and **ETA Time**.

---

 ETA stands for estimated time of arrival. Enter the time in 24-hour (also known as military format). For instance, 10 AM is 10:00, and 3:00 PM is 15:00 (12 hours + 3 hours).



The time zone in which the incident is occurring appears next to the **ETA Time** field.

---

- 3 Click **Submit**.

The confirmation page opens informing you that you are to wait for further instructions before taking any action.

- 4 To [log in](#) to the application, click the **Click here to log into...** link.

### To respond from the application

You can also accept or decline from within this application. The administrator or Staffing Supervisor can accept or decline for the volunteer using these steps.

- 1 [Open the incident's dashboard](#).
- 2 Click the **Volunteers** tab.
- 3 Select **Mobilized** or **Response Pending** in the **Status** field.
- 4 Select **All Locations** in **Location**.
- 5 Find your name and click it in the left pane.

The right pane shows an overview of your status and contact information.

- 6 Click **Accept** or **Decline** in the right pane.

## Edit Incident Details

Divisional administrators can edit the details of an incident or event occurring anywhere in their division. A group administrator can edit incidents with which their group is associated.

Details you can edit include the incident's contact information, type, and description.

### To edit an incident's details

- 1 In the navigation bar, click **Incidents > Incidents**.  
The *Incidents and Events* page opens, showing the list of current (in progress) incidents and events.
- 2 To include the incidents and events that have ended, select the **Show all ended incidents** check box.  
The page refreshes; the left pane shows all current and ended incidents and events.
- 3 To view a summary of an incident or event, in the left pane locate and select it.  
The right pane shows a summary of the incident.
- 4 To view all details for the selected incident or event, click **View Details** in the right pane.  
The incident/event dashboard opens.
- 5 Click **Edit Details**.  
The *Incident Details* dialog box opens.
- 6 Make your changes, and click **Save**.  
The dialog box closes.



For details on the fields, see [Create an Incident](#).

---

## Confirm Volunteer

You can easily confirm a volunteer for this incident once they have accepted the request for mobilization and indicated their estimated time of arrival (ETA).


See also [Volunteer/Incident Status](#).

### To confirm a volunteer

- 1 [Open the incident's dashboard](#).
- 2 Click the **Volunteers** tab.  
The tab opens.
- 3 Select **Accepted** in **Status**.
- 4 Select **All Locations** in **Location**.
- 5 In the left pane, select the volunteer.  
The right pane shows an overview of the volunteer.
- 6 In the right pane, click **Confirm**.

The *Confirm Volunteer* dialog box opens.

- 7 Select the level of authorization for the volunteer for this incident (**Incident Permissions**).

 This does not affect the volunteer's permission level in the application as a whole. It applies to this incident only.

---

- 8 Select the **Location**.
- 9 Click **Save**.

The volunteer's **Status** changes to **Confirmed** and the system automatically sends an email to the volunteer.

## Place Volunteer on Standby

You can easily place a volunteer on standby for this incident. You can do this after the volunteer has accepted the request for mobilization.

See also [Volunteer/Incident Status](#).

### To place a volunteer on standby

- 1 [Open the incident's dashboard](#).
- 2 Click the **Volunteers** tab.
- 3 Select **Accepted** in **Status**.
- 4 Select **All Locations** in **Location**.
- 5 In the left pane, select the volunteer.

The right pane shows an overview of the volunteer.

- 6 In the right pane, click **Stand By**.

The system changes the volunteer's status of **Stand By**.

From here you can mobilize the volunteer ([Confirm Volunteer](#)) or, if the volunteer is no longer needed for the incident, cancel the mobilization request ([Deny or Cancel a Volunteer](#)).

## Deny or Cancel a Volunteer

An authorized administrator or Staffing Supervisor can deny a volunteer's service for this incident, or cancel the request to mobilize a volunteer.

See also [Volunteer/Incident Status](#).

### To deny or cancel a volunteer

- 1 [Open the incident's dashboard](#).
- 2 Click the **Volunteers** tab.
- 3 Select **Accepted** in **Status**.
- 4 Select **All Locations** in **Location**.
- 5 Select the volunteer in the left pane.

The right pane shows an overview of the volunteer's status and contact information.

- 6 Click **Deny/Cancel**.

The volunteer will still appear in your **Mobilized (Status)** list, but can no longer be called for this incident.

## Edit a Volunteer's Contact Information

An authorized administrator or Staffing Supervisor can edit a volunteer's contact information from within the incident's dashboard.

See also [Volunteer/Incident Status](#).

### To edit contact information

- 1 [Open the incident's dashboard](#).

- 2 Click the **Volunteers** tab.

The tab opens.

- 3 Select the appropriate **Status**.

- 4 Select **All Locations** in Location.

- 5 Select the volunteer in the left pane.

The right pane shows an overview of the volunteer's status and contact information.

- 6 Click **Edit**.

The *Change Contact Info* dialog box opens.

- 7 Enter or change the **Mobile phone**, **Pager**, and/or **Radio**.

- 8 Click **Save**.

The right pane shows the new or changed information.

## Change a Volunteer's Location/Assignment

In general, the volunteer receives their location/assignment when they check in at the incident. You can easily change a volunteer's location or assignment from within the incident's dashboard.

### To change a volunteer's location/assignment

- 1 [Open the incident's dashboard](#).

- 2 Click the **Volunteers** tab.

The tab opens.


- 3 Select **Accepted** in **Status**.

- 4 Select **All Locations** in **Location**.

- 5 In the left pane, select the volunteer.

The *Change Volunteer Location/Assignment* dialog box opens.

- 6 Select the [role and level of authorization](#) for the volunteer for this incident (**Incident Permissions**).

 This does not affect the volunteer's permission level in the application as a whole. It applies to this incident only.

---

- 7 Select the appropriate **Location/Assignment** row in the table.
- 8 Click **Save**.

## Generate a Participation Report

A volunteer can access and print a report of their participation in the incident. The administrator can also generate and print this report for any volunteer.

### To generate and print the report


- 1 [Open the incident's dashboard](#).
- 2 Click the **Volunteers** tab.  
The tab opens.
- 3 Select the appropriate **Status**.
- 4 Select **All Locations** in Location.
- 5 Select your name (or the volunteer's name) in the left pane.  
The right pane shows an overview of the volunteer's status and contact information.
- 6 Click **Participation Report**.  
The Incident Participation report opens in a new browser window. It contains a summary of incident details and a summary of the volunteer's involvement in the incident.
- 7 Click **Print**.

## End an Incident

Authorized administrators (divisional and associated group) can end an incident.

When you end an incident, the system will automatically:

- Change the incident's status to "ended."
- Check out (and demobilize) volunteers who are still checked in to the incident.
- Send an email to all volunteers (associated with the incident) indicating the incident has ended.

 You cannot "undo" this action. Nor can you reactivate an ended incident.

---

### To end an incident

- 1 In the navigation bar, click **Incidents > Incidents**.  
The *Incidents and Events* page opens, showing the list of current (in progress) incidents and events.
- 2 To view a summary of an incident or event, in the left pane locate and select it.  
The right pane shows a summary of the incident.
- 3 To view all details for the selected incident or event, click **View Details** in the right pane.

The incident/event dashboard opens.

4 Click **End Incident**.

The *End Incident* dialog box opens.

5 Indicate the **Incident End Date** by selecting one of the following:

- Use the current date and time
- Set a previous date and time

6 If you choose to set a previous date, enter the **End Date** and **Time**.

7 Click **End Incident**.

## Incident Roles and Security

Incidents and events call for specific roles and access, based on tasks and assignments. Users are assigned these roles for a specific event. That is, a user who acts as Staffing Supervisor in one incident will not necessarily have that same role (and rights) for another incident.


When an administrator confirms a volunteer for an incident, they assign one of the following roles:


- Incident Basic Access (mobilized volunteer)
- Check-in Registrar
- Staffing Supervisor
- Incident Administrator

The following table lists these incident-specific roles and the tasks they can accomplish in this application:

Role / Task	Mobilized Volunteer	Check-in Registrar	Staffing Supervisor	Incident Admin
View incident summary	x	x	x	x
View incident files	x	x	x	x
View incident locations	x	x	x	x
Accept / deny mobilization request	x*	x	x	x
Change volunteer's incident-specific contact information	x*	x	x	x
View incident metrics		x	x	x
View incident volunteers and staffing needs		x	x	x
View volunteer locations and assignments		x	x	x
Check volunteers in / out		x	x	x
Change volunteer's incident status		x**	x	x
Mobilize volunteers (in group associated with incident)			x	x
Confirm volunteers			x	x
Maintain incident staffing needs			x	x

Role / Task	Mobilized Volunteer	Check-in Registrar	Staffing Supervisor	Incident Admin
Assign volunteers to locations and assignments			X	X
Change volunteer's security role			X***	X***
Maintain incident summary				X
Maintain incident files				X
Maintain incident locations				X
End event				X
* Volunteer can change only their own information				
** Check-in Registrar can change status to only checked in, checked out, on duty, or off duty				
*** Incident Administrator can make a volunteer an Incident Administrator; a Staffing Supervisor cannot change the role of an Incident Administrator or change a volunteer to an Incident Administrator				

 Volunteers whose status is **Declined** (volunteer indicated they were not available) or **Canceled** (an administrator canceled the mobilization request) cannot view details of the incident.

 Security (access to tasks) applies to the entire incident. Access cannot be assigned to specific locations within an incident.

The **State/Division Administrator** can create an event and associate it with the division, or a collection or group within a division. By default, the Division Administrator has the same rights as the Incident Administrator (in table, above). Furthermore, the Division Administrator can mobilize and confirm volunteers for any event in the division.

A **Group Administrator** can perform the following for the group(s) they manage:

- Can create an incident (associated with their group)
- Is automatically an Incident Administrator for an event associated with their group
- Can mobilize and confirm volunteers in their group

The Group Administrator can also view summaries and details (incident dashboard) for incidents associated directly with their group or with their group's collection and division. They can also view summaries of other incidents in the division, but cannot view details or metrics for these incidents.

**Volunteers** cannot view incidents to which they have not been mobilized or requested to mobilize (request for availability). If a volunteer declines the request for mobilization, they cannot view details of the incident (that is, they do not have access to the incident dashboard).

## Volunteer/Incident Status

As the process of creating and managing an incident occurs, volunteers proceed through a series of statuses depending on the volunteer's response and the actions the incident administrator takes.

There are two types of status:

- [Notification](#)

- [Mobilization](#)


Administrators and Staffing Supervisors (SS) can take actions that change a volunteer's status. Designated individuals can check volunteers in and out, but cannot otherwise change a volunteer's status. See the following sections for details on these statuses, and for an [example](#) of the changes in a volunteer's status.

## Notification

The system tracks the volunteer's status from the moment the volunteer is invited to participate in a particular incident (mobilization request).

The following table lists and describes statuses of this type, and the actions that cause a change in status. The **Actor** uses this application to take the **Action** listed.

Actor	Action	Status	Comment
Administrator	Mobilizes the volunteer	Response Pending	Volunteer retains this status until they respond to the request or the administrator chooses not to deploy the individual
Volunteer	Responds to the request	Accepted / Declined	If volunteer accepted, administrator has not yet confirmed volunteer, or Volunteer declined request
Administrator	Confirms volunteer's involvement	Confirmed	Volunteer accepted request and the administrator confirmed
Administrator	Puts volunteer on standby	Stand By	Volunteer accepted request; administrator put them on standby
Administrator	Decided not to deploy (confirm) the individual	Canceled	Volunteer accepted request; administrator canceled the mobilization request for this volunteer

 When sending the mobilization request, if the administrator did not indicate that confirmation is necessary, when the volunteer accepts their status changes to **Confirmed**. If the administrator indicated confirmation is required, the status of the volunteer who accepts changes to **Accepted**, and they are instructed to await further information. Only when the administrator confirms them, do they move to the **Confirmed** status.

## Mobilization

The system tracks the volunteer's participation in the incident, from the moment they depart their "home base" to the moment they arrive safely back at their home base after the incident ends or their involvement ends.

The following table lists and describes statuses of this type. The **Actor** uses this application to take the **Action** listed.

Actor	Action	Status	Comment
Check-in Registrar	Checks the volunteer in to the incident	On Duty	Volunteer is currently on duty

Actor	Action	Status	Comment
Check-in Registrar	Indicates the volunteer is not currently working	Off Duty	Volunteer is still checked in, but is currently off duty
Check-in Registrar	Checks the volunteer out of the incident	Checked Out	Volunteer has not yet indicated they have returned safely to home base
Volunteer	Indicates they have returned to their home base	Demobilized	

In addition, the administrator and supervisors for the incident can view all volunteers they **Mobilized** (to whom they sent the request for availability), and all **Active** volunteers (those checked in, whether on duty or off).

### Example

The following table shows the flow from one status to the next for a volunteer who is invited to participate, accepts the invitation, and is mobilized.

SS is the Staffing Supervisor and CR is the Check In/Out Registrar.

Actor	Action	Volunteer's Status Change
Administrator / SS	Requests mobilization of the volunteer	Response Pending
Volunteer	Accepts request	Accepted
Administrator / SS	Confirms the volunteer's involvement, indicating the volunteer should make their way to the incident	Confirmed
Administrator / SS / CR	Checks the volunteer in to the incident upon their arrival	On Duty
Administrator / SS	Indicates the volunteer is currently off duty (but still mobilized)	Off Duty
Administrator / SS / CR	Checks the volunteer out of the incident; it is likely the volunteer will not be called again for this incident	Checked Out
Volunteer	Indicates they have safely return to their home base	Demobilized

## Manage Your Profile

As a volunteer, you can manage the information and documents in your profile at any time. In addition, you can easily submit requests to join volunteer groups (if available). These options are available under **My Profile** in the navigation bar.

You can:

- [Edit your registration](#) - includes editing or adding to your contact, profession, and license information; changes to certain fields and additions to your professions/licenses will place your volunteer registration into your administrator's queue for review and revalidation
- [Edit your groups](#) - includes editing the groups you currently belong to; from here you may be able to request to join additional groups
- [Manage your documents](#) - includes viewing existing documents, and adding and deleting documents
- [Change your password](#)
- [De-activate your registration and account](#) - due to a number of circumstances, you may choose to de-activate your registration

### Edit Your Registration Information

When you first access the ESAR-VHP application, you set up certain portions of your volunteer profile. You can edit this information at any time.

To edit your profile, point to **My Profile** in the navigation bar, and then select **Edit Registration**. The *Edit My Registration* page opens.



If one of your credentials has expired or is nearing expiration, an appropriate task appears in the **Task** section on your *Home* page. Click it to access the *Edit My Registration* page.


---


Editing your profile can involve one or more of the following:

- Adding to or editing your personal and contact information (**General Information** drawer)
- Editing existing profession information (**Credentials and Licenses** drawer)
- Adding professions and licenses (**Credentials and Licenses** drawer)
- Adding or editing **Background Information**
- Acknowledging your deployment and travel distance preferences and supplying your consent to use your volunteer information (**Acknowledgment** drawer); some of these acknowledgements are required for you to be available as a volunteer

See the following procedures for step-by-step instructions.

Adding a profession can result in drawers being added to your profile that are specific to the profession you select. For example, if you select **Law Enforcement** as the **Profession**, the page may refresh to show the **Law Enforcement Only** drawer.

 Required questions/fields are marked with an asterisk (\*). If you try to submit your registration before completing all required questions/fields, the application displays the required fields in red and highlights the associated drawer header.

 The application is highly customizable. Therefore, the sections and questions that appear in this page depend on your organization's configuration.


---

### To edit personal and contact information


- 1 In the *Edit My Registration* page, click the **General Information** drawer.  
Certain fields prefill with information you entered previously.
- 2 Complete the **Personal Information** section.
- 3 In the **Contact Emails** section, if you want to add another email address:
  - a Click **Add Another**.  
Another **Contact Emails** section opens.
  - b Enter the next **Email** address.
  - c Repeat for each additional email address you want to add.
- 4 Complete any other sections and required fields in the **General Information** drawer.
- 5 Click **Submit** if you are done with your changes.  
-or-  
Move on to the profession-related drawers, such as **Credentials and Licenses**.

### To edit professional information

- 1 In the *Edit My Registration* page, click the **Credentials and Licenses** drawer.  
Some professional information may prefill from previously completed registration forms.
- 2 Edit or add to the information for your current profession(s).

 If your selections call for additional information, the page refreshes to show the appropriate questions/fields.

---

- 3 To add another profession:
    - a Click **Add Another** at the bottom of the drawer.  
A new **Profession Information** drawer opens.
    - b Select a **Profession**.
    - c Complete the appropriate sections in this drawer.
  - 4 If you want to add another profession, repeat the steps in 3, above.
  - 5 If the page contains other profession-related drawers, click each and enter the appropriate information.
  - 6 Open the **Background Information** drawer and complete the appropriate fields and section.  
 This drawer contains the **Fit for Duty Survey** questions.
  - 7 Open the **Acknowledgement** drawer and provide the appropriate answers and information.
-

- 8 Click **Submit**.

-or-

Click **Save** to save your work.

If you want to upload or delete documents as part of your profile changes, see [Manage Your Documents](#). Click **Done** if you want to skip this step.

You are returned to the *Home* page.

## Edit Your Groups

Editing your groups can involve changing information associated with the groups you have already joined and/or submitting a request to join another group(s).

### To edit your groups

- 1 Point to **My Profile** in the navigation bar, and then select **Edit Registration**.


The *Edit My Registration* page opens.

- 2 Click **Edit Groups**.

The *Edit Groups* dialog box opens.

- 3 As appropriate, select one or more groups in each collection.

---


 Some collections may limit you to selecting only one group or allow you to join several. Other collections may require you to join at least one group; if you are required to join at least one, an asterisk (\*) appears next to the collection name.


---

- 4 Click **Save Groups**.

The dialog box closes.

---

 If you select a group that does not require validation of credentials, you will receive an email indicating you are a member of that group.

 The application is highly customizable. Therefore, the sections and questions that appear in this page depend on your organization's configuration.

---

### To edit personal and contact information

- 1 In the *Edit My Registration* page, click the **General Information** drawer.

Certain fields prefill with information you entered previously.

- 2 Complete the **Personal Information** section.

- 3 In the **Contact Emails** section, if you want to add another email address:

- a Click **Add Another**.

Another **Contact Emails** section opens.

- b Enter the next **Email** address.

- c Repeat for each additional email address you want to add.

- 4 Complete any other sections and required fields in the **General Information** drawer.

- 5 Click **Submit** if you are done with your changes.


-or-

Move on to the profession-related drawers, such as **Credentials and Licenses**.

### To edit professional information

- 1 In the *Edit My Registration* page, click the **Credentials and Licenses** drawer.  
Some professional information may prefill from previously completed registration forms.
- 2 Edit or add to the information for your current profession(s).

---

 If your selections call for additional information, the page refreshes to show the appropriate questions/fields.

---

- 3 To add another profession:
  - a Click **Add Another** at the bottom of the drawer.  
A new **Profession Information** drawer opens.
  - b Select a **Profession**.
  - c Complete the appropriate sections in this drawer.
- 4 If you want to add another profession, repeat the steps in 3, above.
- 5 If the page contains other profession-related drawers, click each and enter the appropriate information.
- 6 Open the **Background Information** drawer and complete the appropriate fields and section.

---

 This drawer contains the **Fit for Duty Survey** questions.

---

- 7 Open the **Acknowledgement** drawer and provide the appropriate answers and information.
- 8 Click **Submit**.

-or-

Click **Save** to save your work.

If you want to upload or delete documents as part of your changes, see [Manage Your Documents](#). Click **Done** if you want to skip this step.

You are returned to the *Home* page.

## Manage Your Documents

Your ESAR-VHP application allows you to upload and store documents related to your volunteer registration. For example, you can upload an image of your professional license(s). This information is available to your administrator along with your registration information.

To manage your documents, click **My Profile** in the navigation bar, and then select **Manage Documents**. The *Manage Documents* page opens. If you were just editing your registration or groups, when you submit your information this page opens automatically.

From here you can:

- [Upload a document](#) to your profile
- [View uploaded documents](#)

- [Open an uploaded document](#)
- [Edit a document's description](#)
- [Delete a document](#)

When you are done managing documents, click **Done**.

### To upload a document

- 1 In the top section of the *Manage Documents* page, click the **Browse** button.  
The *Choose File to Upload* dialog box opens.
- 2 Locate the file you want to upload, select it, and click **Open**.  
The dialog box closes. The path to the file you selected appears in the **Choose File to Upload** field.
- 3 If appropriate, enter a **Description** for the file you are uploading.
- 4 Click **Upload**.  
The page refreshes. The fields in the top panel clear and the bottom panel shows the file you just uploaded, including its name and the date of upload.
- 5 To upload another file, repeat these steps.
- 6 When finished, click **Done**.

### To view uploaded documents

The bottom left pane shows all documents uploaded to your profile. It includes the file name, the date it was uploaded, and the user who uploaded it.

To view more detail, select the document in this pane. The detail pane opens on the bottom right. Additional details include the file type and the document's description (if any).

### To open a document

- 1 Select the document in the bottom left pane.  
The detail pane opens on the bottom right.
- 2 In the right pane, click **View**.  
The document/file opens in the appropriate application.

### To edit a document's description

- 1 Select the document in the bottom left pane.  
The detail pane opens on the bottom right.
- 2 In the right pane, make your changes to the **Description**.
- 3 Click **Save**.

### To delete a document

- 1 Select the document in the bottom left pane.  
The detail pane opens on the bottom right.
- 2 In the right pane, click **Delete**.  
The document is deleted.

## Change Your Password

You can change your password at any time from within the application.

### To change your password

- 1 Point to **My Profile** in the navigation bar, and then select **Change Password**.  
The *Change Password* page opens.
- 2 Enter your new **Password**, and then confirm it by entering it again in **Verify Password**.
- 3 Click **Save**.

A confirmation page opens.

Click **Home** in the navigation bar to return to that page.

## De-activate Your Registration

There may come a time when you need to de-activate your volunteer registration and, thereby, this application account. This can be due to a number of factors, such as you are relocating to another State or personal and/or professional circumstances limit your availability or prevent your participation.

In these cases, you can de-activate your volunteer registration account quite easily. Once you do this, you will no longer be able to access this ESAR-VHP application.

### To de-activate your registration

- 1 Point to **My Profile** in the navigation bar, and then select **Deactivate My Registration**.  
The *Deactivate My Account* page opens, asking you to confirm this action.
- 2 Click **Deactivate**.

If you want to re-activate at some point, contact your volunteer administrator.

## Administer Application

The **Administration** menu provides access to a number of areas of the application that aid you in customizing and managing your volunteer management application.

Forms and instructions relate directly to the pages registrants see during the registration process. Collections, groups, and group administrators govern the groups that are available to registrants to join.

There are a couple of ways to create relationships between a group and the user (or users) you assign to administer that group. After you access the collection or group, you can assign an administrator either by:

- Searching for an existing user
- Creating a new user/administrator account

Administering the application involves the following procedures:

- [Build and Configure Forms](#)
- [Construct and Manage Form Lists](#)
- [Manage Collections and Groups](#)
- [Manage Administrators](#)
- [Manage the Calendar](#)
- [Manage Messages](#)
- [Manage Settings](#)
- [Manage Roles and Rights](#)

You can also learn more about:

- [Participants](#) and [Components](#)
- [Collections and Groups](#)
- [Collaboration](#) and [Automated Notifications](#)
- [Customization](#)
- [Settings](#)
- [Roles and Rights](#)

## Build and Configure Forms

Registrants complete a form during the registration process. Volunteers, too, complete the registration form when they add a profession to their profiles, edit their current profile, or register for another group.


This volunteer management application provides collection and group administrators with the tools they need to customize their volunteer registry sites and processes for the collections and/or groups they manage. As an administrator (with the appropriate [rights](#)), you can add sections. You can add questions. You can enter the text for each question, specify the order of questions, and even add a short Help statement for each.

Certain parts of a registration form contain base sections and fields that you cannot remove, such as the first and last name in the **Personal Information** section.

In general, the creator of a section/question is its "owner." The owner can edit or add to the item, such as adding an answer to a question. Administrators at a higher level in the hierarchy also have add/edit access to that section/question. For example, if a group administrator added a question, the collection administrator can edit it. An administrator at the same level as the owner may have some or no access to the question, depending on their [role's rights](#).

See also [Customization](#).

---

 See [Questions and Answers](#) for information about the attributes and characteristics you can define.

---

### To access forms

- 1 In the navigation bar, click **Administration > Forms**.  
The *Form Builder* page opens.
- 2 Select the **Group**.  
The left pane shows the sections and fields/questions currently used within this group's form, organized into the same drawers that the registrant sees.
- 3 From here you can:
  - [Add a section](#)
  - [Add a text or date field question to a section](#)
  - [Add a select \(or multi-select\) field question to a section](#)
  - [Edit a question](#)
  - [Change the order of values in a select field](#)
  - [Change the order of questions](#)


### To add a section

- 1 Select the drawer you want to change.
- 2 Click the **Add section to (drawer name)** button.  
The right pane shows the attribute(s) you need to specify.
- 3 Enter the section **Label**.
- 4 Click **Save**.  
The page refreshes and the section appears in the form/drawer.

### To add a text or date field question

- 1 Select the drawer you want to add a question to, and navigate to the appropriate section.
- 2 Click the associated **Add question to (section name)** button.  
The new question pane opens on the right.
- 3 In **Question Type**, select **Text Field** or **Date Field**.

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 See the [next procedure](#) for steps on creating a **Select** or **Multi-Select** field.

---

- 4 Click **Next**.


The next editing page opens.

- 5 Enter the **Label** and **Result Column Label**.
- 6 If appropriate, enter the **Help** for the question.
- 7 Select the following [attribute](#) check boxes, as appropriate:
  - Required
  - Initiates Validation
  - Validation Only
- 8 Click **Save**.

The question appears in the appropriate section of the drawer.

### To add a select or multi-select field question


---

 A **Select** field allows the registrant/volunteer to select only one option from the list of answers. A **Multi-Select** field allows the registrant/volunteer to select multiple options from the list.

---

- 1 Select the drawer you want to add a question to, and navigate to the appropriate section.
  - 2 Click the associated **Add question to (section name)** button.


The new question pane opens on the right.
  - 3 In **Question Type**, select **Select Field** or **Multi-Select Field**.
- 

 See the [previous procedure](#) for steps on creating a **Text** or **Date** field.

---

- 4 Click **Next**.

The next editing page opens.
  - 5 Enter the **Label** and **Result Column Label**
  - 6 If appropriate, enter the **Help** for the question.
  - 7 Select the following [attribute](#) check boxes, as appropriate:
    - Required
    - Initiates Validation
    - Validation Only
  - 8 To use one or more predefined sets of answers, select the list or lists from **Answer Lists**.
- 

 For information about predefined form/answer lists, see [Construct and Manage Form Lists](#).

---

- 9 To add answers:
  - a Click **Add Answer**.

A field opens.
  - b Enter a value.
  - c Select the **Preferred** check box if you want this value to appear at the top of the list of values in the **Select Field**.

- d Repeat these steps to add more answers to the field/question.
- 10 Click **Save**.

The question appears in the appropriate section of the drawer.

---



If you want to apply a new order to the answers in the field, see the procedure [below](#).

---

### To edit a question

- 1 Select the drawer that contains the question you want to edit.
- 2 Click the question's **Edit** button.  
The right pane displays the question's details.
- 3 Make your changes.
- 4 Click **Save**.

### To change the order of values in a select field

- 1 Select the drawer that contains the question (**Select Field**) you want to edit.
- 2 Click the question's **Edit** button.

The right pane shows the fields details.

---



If an answer does not have an **Up** and/or **Down** button next to it, you cannot change the order in which it appears in the form.

---

- 3 In the **Answer Text** area, click the **Up** and **Down** buttons to specify the order of answers in the field.
- 4 Click **Save**.

### To change the order of questions

- 1 Select the drawer that contains the question(s) you want to re-order.



If a field/question does not have an **Up** and/or **Down** button next to it, you cannot change the order in which it appears in the form.

---

- 2 In the left pane, click the question's **Up** or **Down** button, as appropriate.  
The page refreshes to show your changes.

## Construct and Manage Form Lists

Your organization can set up standard answer (form) lists. For example, for questions that require only **Yes** or **No**, your State may have set up a standard "Yes-No" list that contains only those values.

---



See [Questions and Answers](#) for information about the attributes and characteristics you can define.



There are several [default form lists](#) that you cannot view in the *Form Answer Lists* page.

---

### To access form lists

In the navigation bar, click **Administration > Form Answer Lists**.

The *Form Answer Lists* page opens. The left pane shows established lists.

### To add a form list

- 1 Click **Add List**.

The right pane shows the fields to complete.

- 2 Enter the **Label** for the list.



---

It is recommended that you avoid giving two lists the same **Label** (name).

---

- 3 To add answers to the list:

- a Click **Add Answer**.

A field opens.

- b Enter the answer text.

- c Repeat these steps to add another answer.

- 4 Click **Save**.

### To edit a form list

- 1 In the left pane, locate the list you want to edit.

- 2 Click its **Edit** button.

- 3 Make your changes.

- 4 To add answers to the list:

- a Click **Add Answer**.

A field opens.

- b Enter the answer text.

- c Repeat these steps to add another answer.

- 5 Click **Save**.

## Manage Collections and Groups


As an administrator, you can add and otherwise manage a collection of groups. When a potential volunteer registers, they will see this collection, and will be able to (or required to) submit registration for one or more [groups in the collection](#), depending on the collection's configuration.

The **Manage Group Collections** area displays collections and the groups within them in a hierarchical format. If desired, you can also create a level below **Groups**, called **Group Filters**.

If you have the appropriate authorization, you can:

- [Add a new collection](#) , which includes adding one or more [groups](#) to the collection. The process can also include adding [filters](#) to groups and setting the maximum number of groups a volunteer can join.

---

 Group filters allow you to build "filters" based on information your volunteers provided in their profiles. In this way, volunteers are not necessarily confined to the groups for which they registered. See [Group Filters](#) for more information.

---

- Manage a collection and the groups and filters within it. This includes [editing collections, groups, and filters](#) and/or [changing the maximum number of groups](#) a volunteer can join in a collection.
- [Manage collection, group, and filter administrators](#).

## To access collections and groups

In the navigation bar, click **Administration > Groups**.

The *Manage Group Collections* page opens. The left pane shows the existing collections to which you have access, organized in a directory tree structure. Click the arrow in front of an item to expand it and show its content.

## Add a Collection


The process of adding a new collection involves the following procedures:

- [Add the new collection](#)
- [Add groups to the collection](#) and, if appropriate, [add filters to your groups](#)
- [Set the maximum number of groups](#) a volunteer can join

## To add a new collection

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens. The left pane shows the existing collections to which you have access, organized in a directory tree structure.
- 2 In the left pane, click **Add Collection**.  
The right pane displays the fields to complete for the collection.
- 3 Enter the **Collection Name**.
- 4 As appropriate, enter the collection's **Description** and **Contact Info**.

---

 The **Description** appears next to the collection name in the registration pages. You may want to use this to indicate the number of groups the registrant can or should select in this collection.

---

- 5 If you want to require each registrant to join at least one group in the collection, select the **Required** check box.
- 



For new collections, you cannot set a **Group Maximum** greater than zero until you have [added groups](#) to the collection. Thereafter, you can [set the maximum number of groups a volunteer](#) can join in that collection.

---


- 6 Click **Save**.  
The system saves the new collection. In the left pane, expand the **Collections** level to view the new collection.

## To add a group to a collection

Repeat this procedure for every group you want to add to your new collection.

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens. The left pane shows the existing collections to which you have access, organized in a directory tree structure.
- 2 In the left pane, expand the hierarchy to locate the collection you want to add a group to, and select the collection.
- 3 Click **Add Group** in the right pane.  
The pane refreshes to show the fields to complete.
- 4 Enter the **Group Name**.
- 5 As appropriate, enter the group's **Description** and **Contact Info**.
- 6 If appropriate, select the **Approval Not Required** check box.

---

 Select the **Approval Not Required** check box only when joining the group does not require any verification of credentials.

---

- 7 Click **Save**.  
The system saves the new group. In the left pane, expand the **Collections** and **Groups** levels to view the new group.



After adding groups to a collection, you can [set or change the maximum number of groups](#) a volunteer can join in that collection.

---

## To add a filter to a group

As part of new collection creation, you can also add filters to groups.

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens. The left pane shows the existing collections to which you have access, organized in a directory tree structure.
- 2 In the left pane, expand the hierarchy to locate the group you want to add a filter to, and select the group.
- 3 Click **Add Group Filter** in the right pane.  
The pane refreshes to show the fields to complete.
- 4 Enter the **Filter Name**.
- 5 As appropriate, enter the filter's **Description**.
- 6 Specify the group's **Condition**.  
The pane refreshes to show the **Selection** field.
- 7 Specify the **Selection**.



This is where you specify the conditions on which the filter is based. For example, if you want to create a filter that includes only volunteers who reside in Lincoln county, choose **County** from the **Condition** field, and then specify **Lincoln** in the **Selection** field.

---

- 8 Click **Save**.

The system saves the new filter group. In the left pane, expand the **Collections** and **Groups** levels to view the new filter.

### To set a maximum number of groups

For any collection, you can specify the maximum number of groups a volunteer can join. Leaving the count at zero indicates the volunteer can join zero, one, or more.

- 1 In the left pane, locate and select the collection.  
The right pane shows the collection's details.
- 2 In the right pane, select the number in **Group Maximum**.



This sets a limit on the number of groups a volunteer can join within this collection. Setting the count to zero indicates the volunteer can join zero, one, or more.

---

- 3 Click **Save**.

### Add a Group

An authorized administrator can add one or many groups to a collection.

#### To add a group to a collection

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens. The left pane shows the existing collections to which you have access, organized in a directory tree structure.
- 2 In the left pane, expand the hierarchy to locate the collection you want to add a group to, and select the collection.
- 3 Click **Add Group** in the right pane.  
The pane refreshes to show the fields to complete.
- 4 Enter the **Group Name**.
- 5 As appropriate, enter the group's **Description** and **Contact Info**.
- 6 If appropriate, select the **Approval Not Required** check box.



Select the **Approval Not Required** check box only when joining the group does not require any verification of credentials.

---

- 7 Click **Save**.

The system saves the new group. In the left pane, expand the **Collections** and **Groups** levels to view the new group.

---



After adding groups to a collection, you can [set or change the maximum number of groups](#) a volunteer can join in that collection.

---

### Add a Group Filter

Authorized administrators can create filters within groups in the collections they manage.

Filters allow you to group volunteers based on detail in their profiles. Registrants and volunteers do not sign up directly for these subgroups. Rather, they are built on dependencies your State administrator identified.

For example, you have a group that is specific to seven counties in the northern part of your State. You want an easy way to view only those volunteers in the group who reside in two specific counties. You would set up a filter in that group that includes only those two counties.

In this way, volunteers are not necessarily confined to the groups for which they registered.

For more information and examples, see [Group Filters](#).

### To add a filter to a group

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens. The left pane shows the existing collections to which you have access, organized in a directory tree structure.
- 2 In the left pane, expand the hierarchy to locate the group you want to add a filter to, and select the group.
- 3 Click **Add Group Filter** in the right pane.  
The pane refreshes to show the fields to complete.
- 4 Enter the **Filter Name**.
- 5 As appropriate, enter the filter's **Description**.
- 6 Specify the group's **Condition**.  
The pane refreshes to show the **Selection** field.
- 7 Specify the **Selection**.



This is where you specify the conditions on which the filter is based. For example, if you want to create a filter that includes only volunteers who reside in Lincoln county, choose **County** from the **Condition** field, and then specify **Lincoln** in the **Selection** field.

---

- 8 Click **Save**.  
The system saves the new filter group. In the left pane, expand the **Collections and Groups** levels to view the new filter.

### Edit a Collection, Group, or Filter

An authorized administrator can edit details for a collection, group, and/or group filter.

#### To edit a collection, group, or group filter

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens. The left pane shows the existing collections to which you have access, organized in a directory tree structure.
- 2 In the left pane, expand the hierarchy to locate and select the collection, group, or group filter you want to edit.  
The right pane shows the item's detail.

- 3 Make your edits in the right pane.
- 4 Click **Save**.

### Set or Change Group Maximum

For any collection, you can specify the maximum number of groups a volunteer can join, or indicate there is no limit.

- 1 In the left pane, locate and select the collection.  
The right pane shows the collection's details.
- 2 In the right pane, select the number in **Group Maximum**.



This sets a limit on the number of groups a volunteer can join within this collection. Setting the count to zero indicates the volunteer can join zero, one, or more.

---

- 3 Click **Save**.

### Manage Administrators

You can create or assign an administrator in a couple of ways. If the individual already exists in the system as a user, you can search for that user and assign them as administrator of one or more collections/groups. If the individual is not in your system, you can create a new user account and then assign them to one or more collections/groups.

To work with collection, group, and group filter administrators, click **Administration > Groups**.

The *Manage Group Collections* page opens. From here, you can:

- [Create a new administrator](#)
- [Assign an existing user as administrator](#)
- [Remove an administrator](#)



When you assign someone as an administrator, it is recommended that you change that individual's role to an [administrator level role](#). If you leave the individual's role as **Volunteer**, they will not have access to any administrative tasks.

---


### To create a new administrator

To add a new user to the system and assign that user as an administrator:

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens.
- 2 In the left pane, expand the hierarchy to locate the collection, group, or group filter and select the **Admins for...** folder for the item.  
The right pane shows the administrators for that item.
- 3 In the right pane, click **Create Admin**.  
The right pane shows the fields to complete for the new user/administrator.
- 4 Enter the administrator's **First Name** and **Last Name**.

- 5 Enter the administrator's **Username**.
- 6 Enter the administrator's **Password**, and then enter it again in **Verify Password**.
- 7 Select the **Password Challenge**, and enter the **Challenge Answer**.


---

 If the user forgets their password at some point, this is the question that the application displays. Entering the correct answer will help verify the individual's identity as an application user.

---

- 8 If appropriate, enter the administrator's **E-mail** address.

---

 This is required if you want to correspond with the administrator and to grant them access to the application.

---

- 9 Click **Next**.

The right pane shows the *Group Admin Confirmation* page.

- 10 Select an [administrator-level role](#) for the new administrator (**Select a role**).
- 11 Click **Save**.

The system saves the assignment. In the left pane, expand the tree structure to view the administrator.

### To assign an existing user as administrator

To assign an existing user as an administrator:

- 1 In the navigation bar, click **Administration > Groups**.

The *Manage Group Collections* page opens.

- 2 In the left pane, expand the hierarchy to locate the collection, group, or group filter and select the **Admins for...** folder for the item.

The right pane shows the administrators for that item.

- 3 In the right pane, click **Search for User**.

The right pane shows the fields and drawers where you can specify your search criteria.

- 4 Select or enter your [search criteria](#) in one or more drawers on the page.

- 5 Click **Search**.

The right pane displays the search results.

- 6 Click **Choose** in the **Action** column for the appropriate user.



You may need to scroll to the right to see the **Action** column.

---

The **Group Admin Confirmation** appears in the right pane.

- 7 Select an [administrator-level role](#) for the new administrator (**Select a role**).



If you have just assigned a volunteer to be a collection, group, or filter administrator, you will want to assign an administrator-level role to the user at this time.

---

- 8 Click **Save**.

The system saves the assignment. In the left pane, expand the tree structure to view the administrator.

### To remove an administrator

To remove an administrator:

- 1 In the navigation bar, click **Administration > Groups**.  
The *Manage Group Collections* page opens.
- 2 In the left pane, expand the hierarchy to locate the collection, group, or group filter and select the **Admins for...** folder for the item.  
The right pane shows the administrators for that item.
- 3 In the right pane, click **Remove Admin** in the **Action** column.  
A confirmation page opens in the right pane.

## Manage Calendar

Administrators can manage the calendars and entries (activities) for groups they manage. This includes adding, editing, and deleting activities.


Any volunteer in that group can view their groups' activities on their *Home* page, and click an activity to view its details.

To navigate within the calendar:

- Click the arrows in the upper right corner of the calendar to move from month to month.
- To return to the current date, click **today**.

The current date is a different color in the calendar.

---

 If you add an activity to a month that is not currently displayed in this page (or change an existing activity to another month), you will not see the activity when you click **Save**. You must move to the appropriate month to see the activity.

---

### To access calendar entries


- 1 In the navigation bar, click **Administration > Calendar**.  
The *Manage Calendar Entries* page opens.
- 2 Select the **Group**.  
The left pane shows the current calendar for the selected group.
- 3 From here you can:
  - [Add a new activity](#)
  - [Edit an existing activity](#)
  - [Delete an activity](#)

### To add an activity

- 1 Click **Add Activity**.  
The right pane shows the detail to complete for the activity.

- 2 Enter the **Name**.
- 3 Enter or select the **Start Date**.
- 4 If appropriate, enter or select the **End Date** for the activity.

---

 These values dictate the number of days on the calendar this activity will span. If you do not specify an **End Date**, it defaults to the same date as the **Start Date**.

---

- 5 Enter the **Details**.
- 6 Click **Save**.

The activity appears in the calendar in the left pane.

### To edit an activity

- 1 In the left pane, click the activity in the calendar.

The right pane shows the details of the activity.
- 2 Make your changes.
- 3 Click **Save**.

### To delete an activity

- 1 In the left pane, click the activity in the calendar.

The right pane shows the details of the activity.
- 2 Click **Delete**.

The activity is removed from the calendar.

## Manage Messages


Administrators can manage the messages the system displays to members of the collections and groups they manage. This includes adding, editing, and deleting messages.

If added at the collection level, the systems displays the message to every volunteer in any group in the collection. If added for a specific group, only volunteers in that group see the message. Messages appear on the *Home* page. The volunteer can click the message to view its details.

Use a message's start and end dates to control its availability, as follows:

- If you want a message to appear at a future date, specify that as the **Start Date**.
- To schedule the removal of a message from volunteers' *Home* pages, you can set an appropriate **End Date**. When the date is reached, the message no longer appears to volunteers.

---

 If you want to remove the message from the system (that is, from both the *Home* page and **Administration**), [delete](#) it.

---

### To access message entries

- 1 In the navigation bar, click **Administration > Messages**.

The *Manage Messages Entries* page opens.
- 2 Select the **Group**.

The left pane shows the current messages for the selected group.


- 3 From here you can:
  - [Add a message](#)
  - [Edit a message](#)
  - [Delete a message](#)

### To add a message

- 1 Click **Add Message**.

The right pane shows the detail to complete for the message.
- 2 Select the **Type**.
- 3 Enter a **Title** for the message.
- 4 Enter or select the **Start Date**.
- 5 If appropriate, enter or select the **End Date** for the message.

---

 You do not have to specify an **End Date** for the message. If you do not, the message remains on the volunteers' *Home* page until you set an end date or delete the message.

---


- 6 Enter the **Details**.
- 7 Click **Save**.

### To edit a message

- 1 In the left pane, locate and select the message.

The right pane shows the message details.
- 2 Make your changes.

---

 To "expire" a message, set its **End Date** to the date you want the system to remove it from the volunteers' *Home* page.

---

- 3 Click **Save**.

### To delete a message


- 1 In the left pane, locate and select the message.

The right pane shows the detail to complete for the message.
- 2 Click **Delete**.

The message is deleted. If the message was current, it no longer appears on the volunteers' *Home* page.

## Manage Settings

Administrators with the appropriate permission level can manage a number of [settings](#) for the application and their division, including the application's registration instructions and welcome message, as well as a variety of email templates.

 If you change any of these settings, the next time you access the setting the lower pane contains the **Restore System Default** button. Click it to revert to the default value(s) for this setting.

### To access division settings

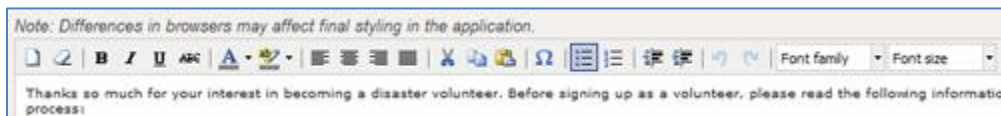
- 1 In the navigation bar, click **Administration > Settings**.  
The *Manage Division Settings* page opens showing each setting's name, description, and category/type.
- 2 Click anywhere in the setting's row in the top pane.  
The bottom pane shows the current information.
- 3 From here you can work with:

Volunteer Help	<a href="#">Registration instructions</a> The application's <a href="#">Welcome message</a> The application's <a href="#">Rejection message</a>
Divisional Settings	<a href="#">Contact information</a> <a href="#">Email signature</a> <a href="#">Validation expiration</a>
Email Templates	<a href="#">Email templates</a>

See [Automated Notifications](#) for information on when the system uses these email templates.

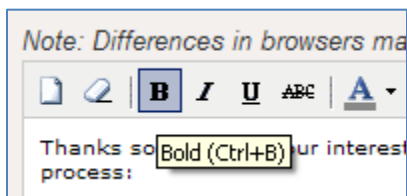
### Formatting Text

For messages, you can format the text. The bottom pane contains the formatting toolbar:



Use these tools to change the text style (bold, italic, underline), change the text color and font and size, cut and paste text, indent text, and more. Hover the cursor over a tool to see its "tooltip"--a brief description of the tool.

**Example:** Highlight the text in a paragraph and click the **Bold** button to change to bold text style:



## Volunteer Help

### To work with registration instructions

As an administrator, you can change the instructions the application displays when the registrant begins the registration process. Instructions can include guidance for volunteering in this region/area, information on licenses, and the approximate time it will take to complete registration.

You can also apply a number of formats to the text, such as making text bold, specifying a font family and size, and applying a color to some or all of the text.

- 1 Click **Registration Instructions** in the top pane.
- 2 Enter or edit the instructions.
- 3 Apply [formatting](#).
- 4 Click **Save**.

### To work with the Welcome message

You can add or change your organization's **Welcome** message. The bottom pane includes a number of formatting options.

- 1 Click **Welcome Message** in the top pane.
- 2 Enter or edit the message.
- 3 Apply [formatting](#).
- 4 Click **Save**.

### To work with the rejection message

You can enter or edit the information or instructions a rejected registrant sees when they attempt to log in to the application. The system displays the message only when the registrant has been rejected for every group they attempted to join.

- 1 Click **Reject Volunteer**.
- 2 Enter or edit message.
- 3 Apply [formatting](#).
- 4 Click **Save**.

## Divisional Settings

### To specify contact information

The **Contact Us Address** and **Contact Information** settings allow you to specify the details the registrant or volunteer sees when they click the **Contact Us** link in the application.

- 1 Click **Contact Us Address** or **Contact Information**.
- 2 In each area, enter the appropriate contact information.
- 3 Click **Save**.

### To specify an email signature

You can specify the information that will appear as a signature on every email that you generate or the system generates.

- 1 Click **Email Signature**.
- 2 Enter the appropriate signature information.
- 3 Click **Save**.

### To specify validation expiration

You can specify the number of days at which volunteers' credentials must be revalidated. For example, you specify 90 days. When 90 days have elapsed since a volunteer's last validation, their credentials must be revalidated.

- 1 Click **Validation Expiration Days**.
- 2 Enter the number of days.
- 3 Click **Save**

### Email Templates

You can change the templates on which [system-generated email messages](#) are based. This includes the following templates:



Many of these messages contain automated placeholders. This text appears [in brackets]. **Do not remove these placeholders.** Each holds the place for information that the system automatically inserts into the message, such as for a hyperlink to the application, detail on approval or denial of a request to join a group, information on a credential nearing expiration or that has expired, and so forth.

If you accidentally remove one of these placeholders and have saved your changes, you can click the **Restore System Default** button in the bottom pane. This will restore the default text within the template, including placeholders. Keep in mind that this will also override any other changes you made in the template.

Invite a potential volunteer to register in the system	Provide a link to the application for volunteer's who forgot their password
Thank a new volunteer for registering	Send a request to mobilize the volunteer for an incident
Inform the volunteer about their request to join a group (approval/denial)	Confirm a volunteer for an incident and send instructions
Notify a volunteer that a license or credential is nearing expiration	Check the volunteer out of the incident
Reject of a volunteer's registration	Notify the volunteer that their user account has been deleted
Notify a volunteer that a license or credential has expired	Notify the volunteer that their user account has been deactivated
Send the volunteer their forgotten username	Notify the volunteer that their user account has been reactivated

### To work with email templates

- 1 Click **Name of the Email Template (Category)** you want to change.

- 2 Enter or edit the **Subject**.
- 3 Enter or edit the **Body**.
- 4 Click **Save**.

## Manage Roles and Rights

Authorized administrators can create and edit roles and [assign the rights](#) associated to each role.


### To access roles and rights

- 1 In the navigation bar, click **Administration > Roles and Rights**.

The *Manage Roles* page opens.

- 2 From here you can:
  - [Add a role](#)
  - [Edit a role](#)
  - [Add or change rights](#) for a role
  - [Delete a role](#)

---

 The application contains three default roles: **Volunteer**, **Limited Administrator**, and **Group Administrator**. You cannot change the details of these default roles. However, this page lets you view these roles and the rights assigned to each so that you can determine whether you need to create new role(s) with different [sets of rights](#).

---

### To add a role

- 1 Click **Add Role**.
- The right pane shows the fields to complete for the new role.
- 2 Enter the **Name** and **Description** for the role.
  - 3 Open the **Rights** field and select one or more activities that you are authorizing this role to perform.
  - 4 Click **Save**.

The left pane shows the role you just added.

### To edit a role

- 1 In the left pane, select the role you want to edit.

The right pane shows its detail.
- 2 Change the **Name** and **Description** for the role, as appropriate.
- 3 Open the **Rights** field and select or change the activities that you are authorizing this role to perform.
- 4 Click **Save**.

### To add or change rights


- 1 In the left pane, select the role you want to edit.

The right pane shows its detail.

- 2 Open the **Rights** field and select or changes the activities that you are authorizing this role to perform.
- 3 Click **Save**.

### To delete a role

---

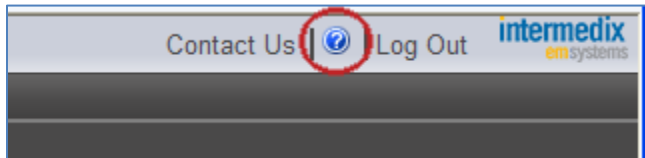
 You cannot delete the system's default roles.

---

- 1 In the left pane, select the role you want to delete.  
The right pane shows its detail.
- 2 In the right pane, click **Delete**.  
A message opens asking you to confirm the deletion.
- 3 Click **Delete**.  
A confirmation page opens.
- 4 Click **OK**.

## Help System

Your **Help system** is available to you from every page within your volunteer management application via the **Help** icon located in the upper right corner of each page of the application, as shown below:



When you click the icon, the Help system opens in a new browser window.

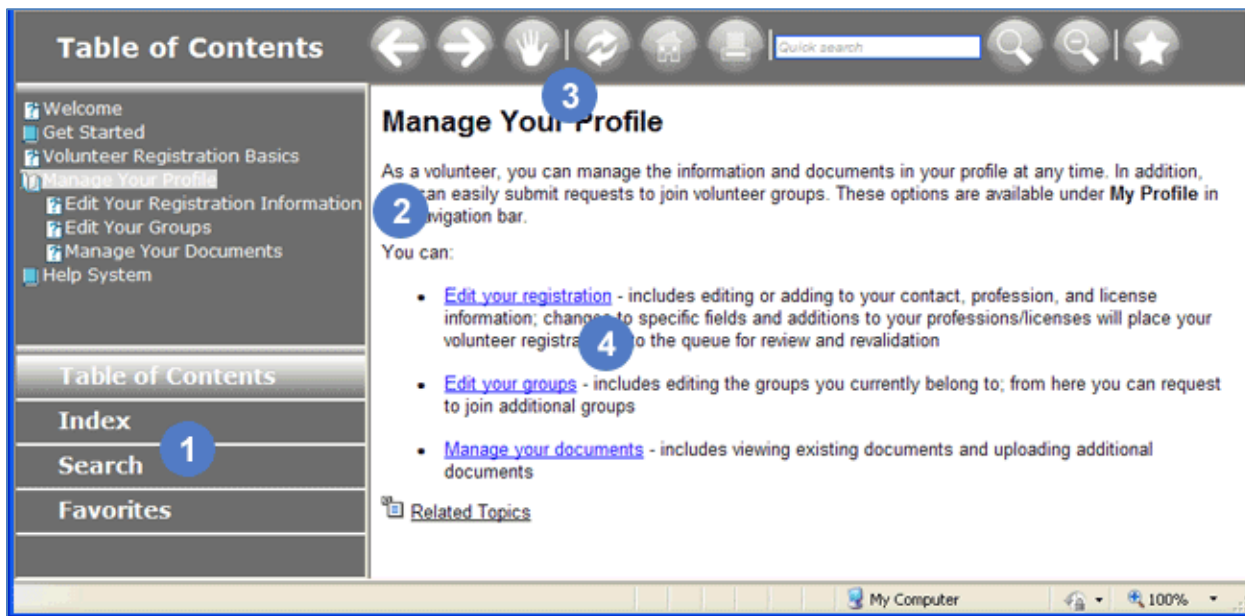
This topic includes the following:

- Help system [elements](#)
- [Contextual](#) Help

Take a few moments to peruse the [Get Started](#) topics to gain an understanding of this application and its various elements.

## Elements

Use the following illustration and table to learn about navigating through the Help system and finding the information you need:

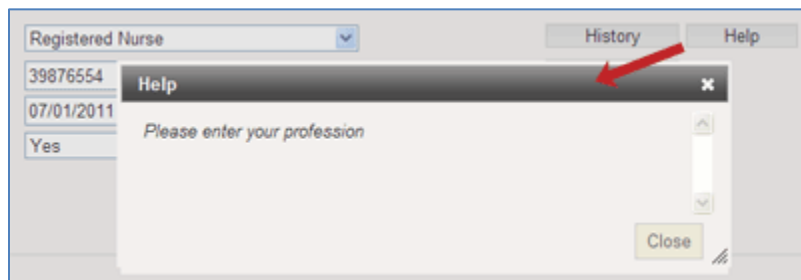


Number	Description
1	<p>This Help system contains step-by-step instructions for using your volunteer management application. The left pane is for navigation and provides three easy ways to locate information quickly:</p> <ul style="list-style-type: none"> <li>• Detailed, expandable <b>Table of Contents</b></li> <li>• Extensive <b>Index</b></li> <li>• Content <b>Search</b> feature</li> </ul> <p>You can also create a list of your <b>Favorites</b>. These can be topics or searches that you want to refer to or use again. To add a topic to this list, locate it and click the star icon in the Help toolbar (see #3, below).</p>
2	<p>The right pane displays the content of the item you select in the left pane. In this example, the user clicked <b>Manage Your Profile</b> in the <b>Table of Contents</b> in the left pane.</p>
3	<p>The Help toolbar contains a number of tools you might find useful for navigating through the Help. Hover over an icon to see a "tooltip" - a brief description of the tool. Use these tools to add a topic to <b>Favorites</b>, print the content of a topic, search for specific text, browse through the topics you've viewed, and more.</p>
4	<p>Throughout the content you will find links to cross-referenced information and related topics. In this example, clicking the links in the list moves you to the indicated topic.</p>

## Contextual Help

Some areas of the application contain brief descriptions of the page and/or the steps you can take within the page.

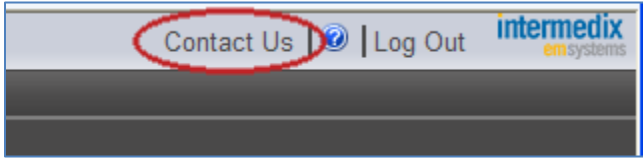
In addition, your administrator can add Help to most of the questions or fields in the registration pages. When you click the **Help** button next to the question, a dialog box opens with information regarding that question.



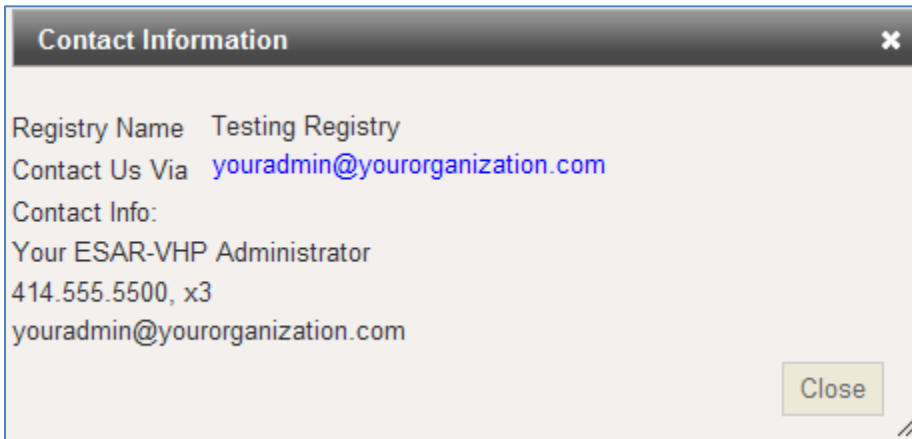
See also [Navigation and Features](#).

## Contact Us

If you have trouble with your ESAR-VHP solution or want to provide feedback on the application, you can contact your administrator. The easiest method is to click the **Contact Us** link in the upper right corner of the application page.



Clicking the link opens the *Contact Information* dialog box.



Click the email link to generate an email message to your administrator. Click **Close** to close the dialog box.