MARYLAND
Department of Health

Maryland Responds Medical Reserve Corps

Volunteer Registry – Administrator Protocols

Version 4.0

2019

MARYLAND
Department of Health
Office of Preparedness and Response

medical
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CHAPTER 1: INTRODUCTION

A. Guide to the Administrator Protocols

Audience: This heading under each section will answer the question, "Who does this apply to?" Sections may apply solely to Unit Administrators or may contain useful instructions that can be shared with volunteers.

1. The Maryland Responds Registry Management System (the Registry), is a system that is obtained by a contract between the Maryland Department of Health, Office of Preparedness & Response and the current vendor, Juvare (www.juvare.com)

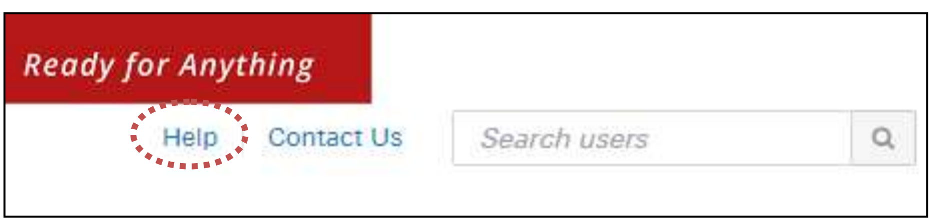
2. For these Administrator Protocols, major topics of relevance to the Registry were identified for Unit Administrators of the Maryland Responds Medical Reserve Corps (MDRMRC)

3. Tailored step-by-step instructions from the Registry's **Help Center** were created that address these major topics

4. Pictures either below or to the right of the text in each section may help orient you. Pay attention to the red or yellow dotted circles to help find buttons and parts of a web page you may need to click

5. If the audience heading is "Audience: Unit Administrators and volunteers," feel free to copy and paste text to respond to volunteer questions or you can direct them to email the MDRMRC State Program at mdresponds.health@maryland.gov for assistance

6. The Administrator Protocols address instructions for main functions of Unit Administrators but are not comprehensive of all tasks. For instructions or help on tasks not mentioned in this document, you have several options:
   - Sign into the Registry at https://mdresponds.health.maryland.gov and use the **Help Center** (see screenshot below). The Help Center contains comprehensive guides, video help and quick reference guides (concise guides).
   - Contact the MDRMRC State Program at mdresponds.health@maryland.gov or at 410-767-7772.
   - If State Administrators are not available, email the Juvare Support Center at support@juvare.com or contact the support line at 877-771-0911.



CHAPTER 2: REGISTRY ACCESS

A. Register

Audience: Unit Administrators and volunteers

Access the Registry at: https://mdresponds.health.maryland.gov.

1. Click the **REGISTER NOW** button
2. From the top of the registration page, click **Add Organizations** button to open the drop down menu
3. From the **Organization Selection** pop-up menu, check the box next to your local Unit*
4. Click **Select** to proceed to the rest of the form and complete all required (marked with asterisk) information
5. Once all required information is complete, click the **Next** button at the right-hand bottom of the page.

* Organizations represent your MDRMRC Unit affiliation. Upon registration, you automatically become a member of the Maryland Responds MRC State Program organization. In addition, you will select ONE local Unit based on your jurisdiction of residence. If you live outside of Maryland, select the "Out-of-State" organization. You will receive notifications regarding your local MDRMRC Unit from your local Unit Administrator. Additionally, you will receive regional, state-wide, or national notifications from the MDRMRC State Program Administrators.

B. Register a New Volunteer

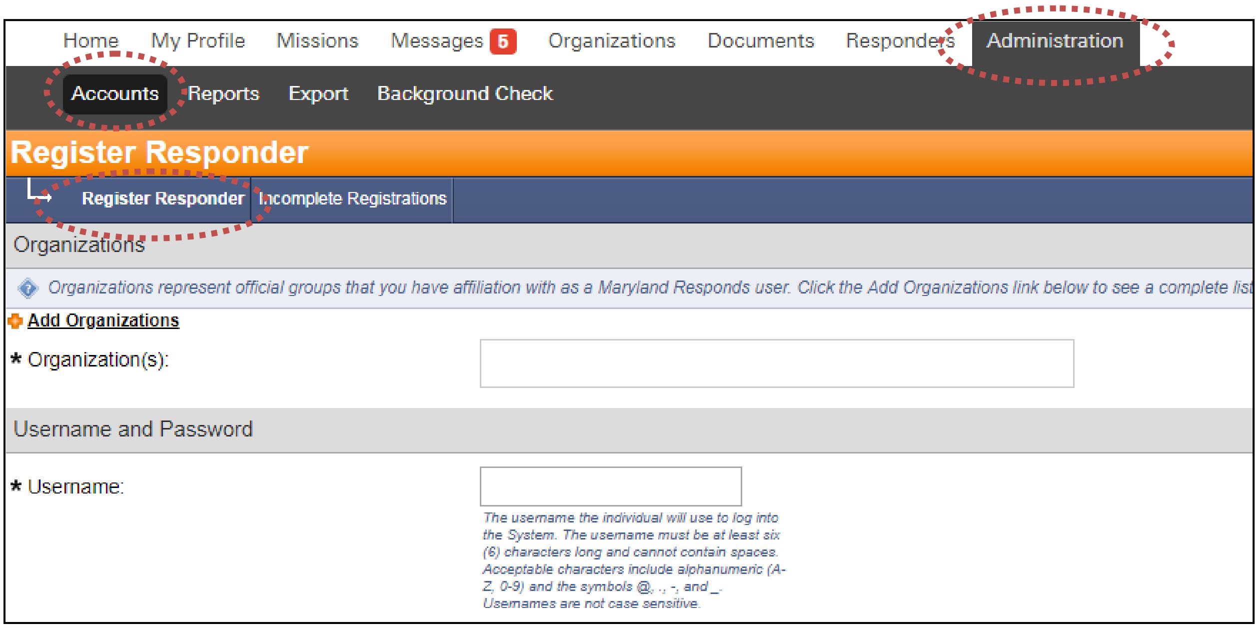
Audience: Unit Administrators – these steps can be followed after recruitment events where you have had volunteers sign up on the paper based registration form.

1. Go to the **Administration** tab

2. Under the **Accounts → Register Responder** sub-tab, you will find the same registration form as if a volunteer had used the home page's **REGISTER NOW** button

3. Follow the directions under Section A of this chapter (steps 2-5)

4. Email the newly registered volunteer to remind them of their username, password, and to complete the rest of their profile



C. Upgrade to Unit Administrator Status

Audience: Unit Administrators – all new Unit Administrators must complete required steps in order to gain the necessary access in the Registry to manage their Unit's volunteers.

1. Email the Maryland Responds MRC State Program at mdresponds.health@maryland.gov
   - A State Administrator will email you a detailed version of the instructions outlined below on gaining access to the system as a unit administrator
   - Note: A prospective unit administrator MUST first email the Maryland Responds MRC State Program to receive detailed instructions before completing these steps

2. Create an account in the Registry

3. Review the Volunteer Registry – Administrator Protocols (this document)

4. Complete the online Unit Administrator Access Form and digitally sign the included Confidentiality Agreement

5. Send a confirmation email notifying the State Program that you have completed the preliminary steps to gain access

6. Coordinate with State Administrators to complete the Unit Administrator Orientation Training

7. A State Administrator will review your submitted form and upgrade your Maryland Responds RMS account to 'local administrator'
   - You will receive a confirmation email from the State Program once this has been completed

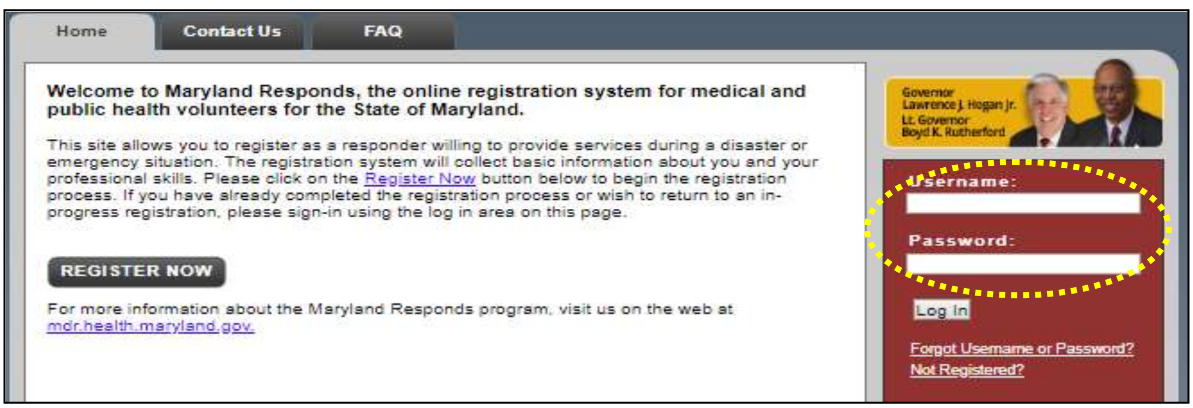
D. Registry Log-in

Audience: Unit Administrators and volunteers

1. Open your browser – the Registry vendor recommends using the latest version of Microsoft Internet Explorer for Windows, Mozilla Firefox for Mac or PC, Apple Safari for Mac or PC or Google Chrome for Mac or PC with JavaScript enabled and pop-up blocker turned off

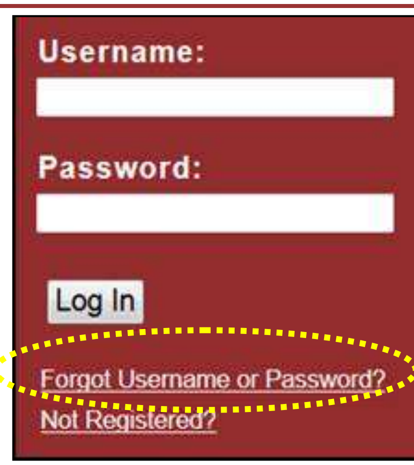
2. Go to https://mdresponds.health.maryland.gov

3. Insert **Username** and **Password** into fields and click **Login**



E. Forgotten Username or Password

Audience: Unit Administrators and volunteers



1. At https://mdresponds.health.maryland.gov click the **Forgot Username or Password** link

2. Enter appropriate username or email information. Click **Request Password** or **Request Username**

3. Check your email for a message that contains username or password information
   - If you do not receive an email, check your email's spam folder to search for the email

4. If you are having difficulty retrieving your username or resetting your password, email the State Program at mdresponds.health@maryland.gov

CHAPTER 3: REGISTRY HOME PAGE

Audience: Unit Administrators

After logging in to the Registry, you will be taken to the **Home Page**. Your **Home Page** is a starting point for getting situated in the Registry and catching up on the activity that happened while you were logged out. The **Home Page** also shows you what requires your attention. Note that Unit Administrator and volunteer **Home Pages** appear the same; however, they will have different updates available for viewing.

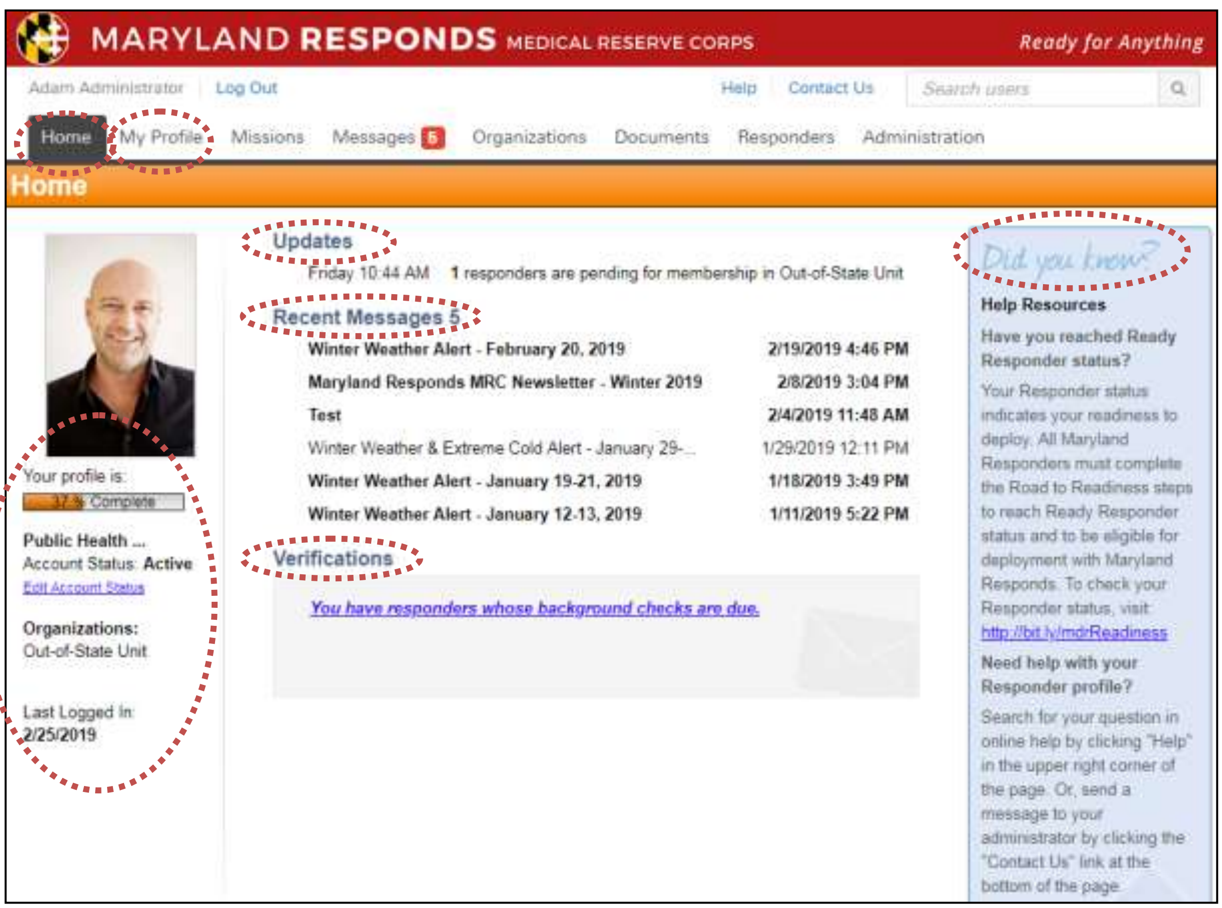
1. The **Updates** section informs you about the most recent activity in the Registry
   - This is also the section that tells you if you have new responders who need to be welcomed to your unit (pending volunteers)

2. The **Recent Messages** section shows messages that you recently received in your Message Center

3. The **Verifications** section will show if there are any volunteers whose background checks or credential verifications are due
   - As of the publication time of this document, the Registry does not have the capacity to perform background checks so please ignore this note (this function will be added by June 2019)

4. The **Did you know?** section shows helpful tips about using the Registry and information for volunteers to reach Ready Responder status

5. The **Profile** bar on the left-hand side of the screen displays a profile overview
   - Click the **My Profile** tab to see your profile in more detail.



CHAPTER 4: REGISTRY PROFILE UPDATES

A. Profile Summary

Audience: Unit Administrators and volunteers

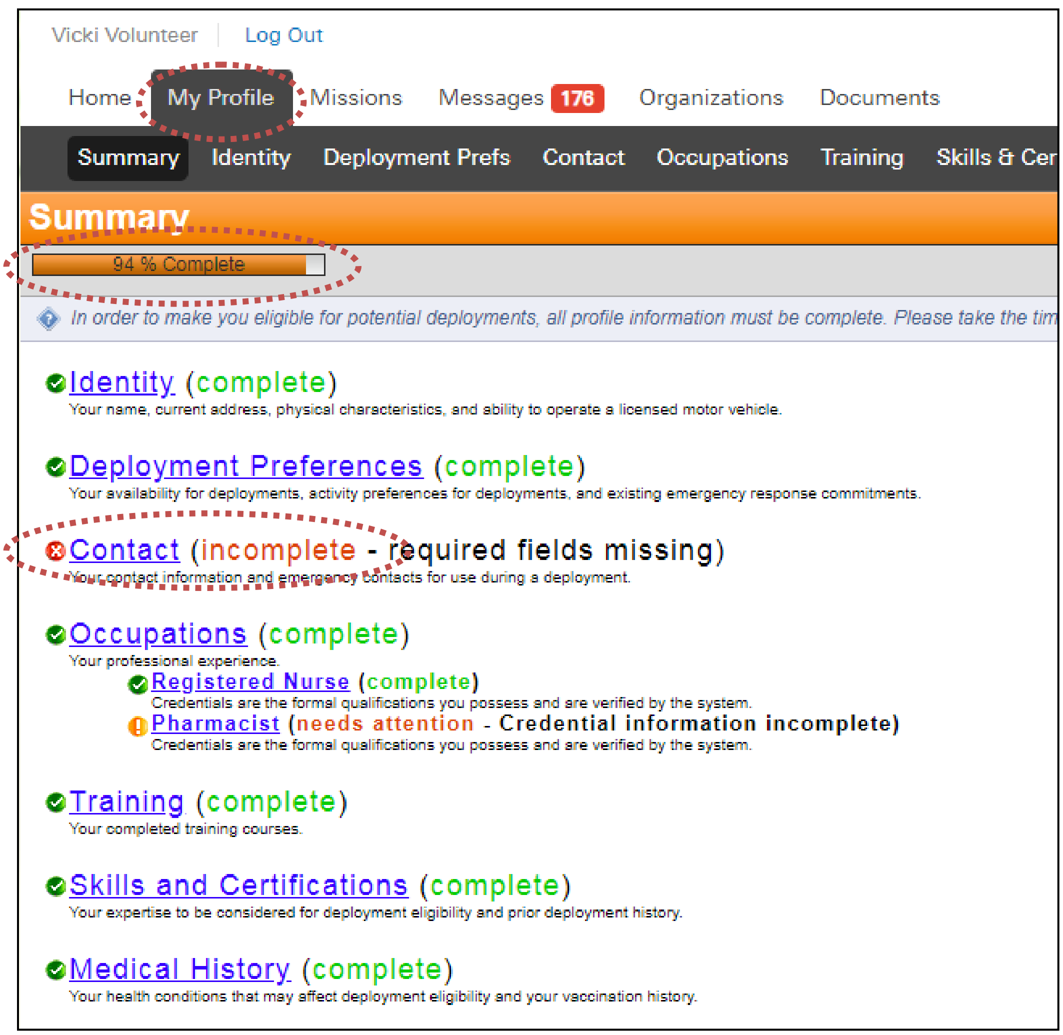
1. Sign into the **Registry**

2. From the top row of tabs, click **My Profile** and a summary of your profile will show

3. Find the orange bar that says **Summary** and underneath this you will find the indicator that tells you your profile percent completion

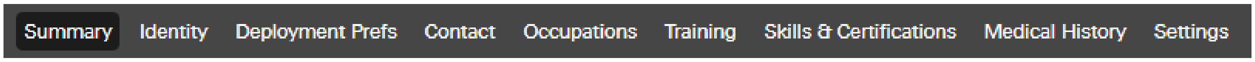
4. Incomplete sections of your profile are marked with a red 'x' and by the message: **"incomplete – required fields missing"**

   Unit Administrators: to view a list of incomplete registrations by volunteer:
   - Go to the **Administration** tab
   - Click the **Accounts** sub-tab and then **Incomplete Registrations**



B. Edit Your Profile

Audience: Unit Administrators and volunteers



1. Under the **My Profile** Tab, select the appropriate sub-tab. To edit any field, click **Edit Information** button and complete fields. For the following sub-tabs, pay special attention to:
   - **Identity**: Enter your name, address, identifying information (DOB, SS#, etc.), and if you have a driver's license. If your name changes, contact mdresponds.health@maryland.gov.
   - **Deployment Preferences**: Choose whether to deploy based on factors like distance and duration. Under "Prior Emergency Response Commitments", identify any commitments that might pose a conflict in the event of an emergency (e.g. volunteering with another emergency response agency, etc.)
   - **Contact**: Enter your telephone numbers, email address, and emergency contact. If you would like to receive text messages, enter a contact method in the drop down menu "SMS/Text Msg". We highly recommend you to enter two email addresses. Note: The Registry requires unique email addresses; two volunteers cannot share the same email. If you do not receive any correspondence from the MDRMRC for more than a month, your contact information is likely out of date. Also check your junk/spam email filters.
   - **Occupations**: Use this tab to enter information about your profession. All responders are classified as either "Medical" or "Non-Medical." Medical occupations require licensure or certification information to be added to your profile. No matter your profession, please be as accurate and complete as possible when filling out the occupation fields. See more information in following sections of this document.
   - **Training**: Use this tab to keep track of any training you have taken. You can upload any certificates you may have received for completing a training. The **Training** tab is also where completion of the Road to Readiness steps is tracked. You may add these as you complete them by choosing the appropriate step for example: R2R Step 1: Profile Completion. The State Program will verify your trainings and Road to Readiness steps.
   - **Skills and Certifications**: Record any information about additional skills or certifications you may have that do not fit under the **Occupation** tab (e.g. languages spoken, prior deployment experience, etc.)
   - **Medical History**: Use this tab to record information such as any health conditions, special needs or allergies you may have as well as information about your vaccination history for specific infectious diseases (hepatitis A, hepatitis B, and tetanus/diphtheria).
   - **Settings**: Use this tab to deactivate or close your Registry account. You can also change your username and password on this page.

2. After making changes or adding information to any tab of your profile, be sure to click **Save Changes**

Note: Volunteers and Unit Administrators should periodically review all their profile information and provide updates as changes occur.

C. Edit Your Profile: Occupations Sub-tab

Audience: Unit Administrators and volunteers

1. Under the **My Profile** tab, select the **Occupations** sub-tab

2. Click the **Add Another Occupation** button
   - Each registered volunteer must have no less than one and no more than two occupations listed
   - If you are a student, unemployed, or retired, make selections based on your background and indicate so in the later question: **What is your current professional status**

3. All occupations fall under one of two categories; **Medical** or **Non-Medical** so choose one depending on your profession
   - Note: Social workers and professional counselors fall under "Medical".

4. For the **Occupation** field, select your occupation from the drop-down menu

5. Provide a response via the drop-down menu to the question, **What is your current professional status** and select **Save Changes** which will take you to a location to enter in further details for your occupation

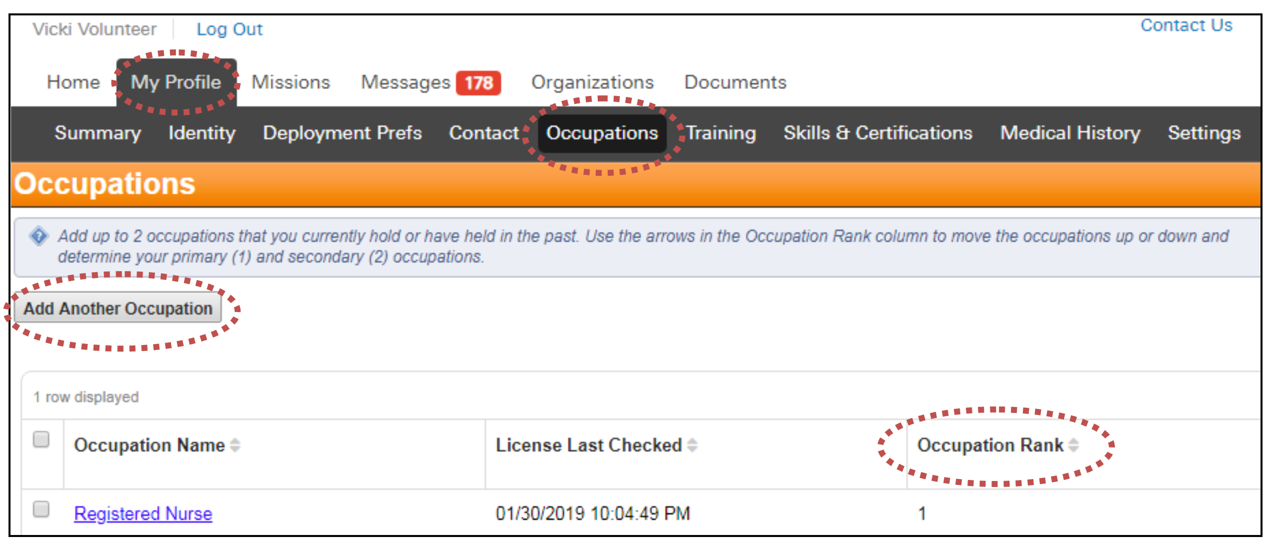
6. Click the **Edit Occupations** button and complete the fields – if you are a licensed professional, pay special attention to:
   - **"Is the name on this license the same…"** If your profile name differs from the name on your license, license verification will fail
   - **License Number**: Enter your license number. Ensure you do not switch '0' with 'O'
   - **Expiration date**: Enter your license expiration date. When your license expires or is renewed, remember to update this field
   - Additional fields may need to be completed depending on your occupation

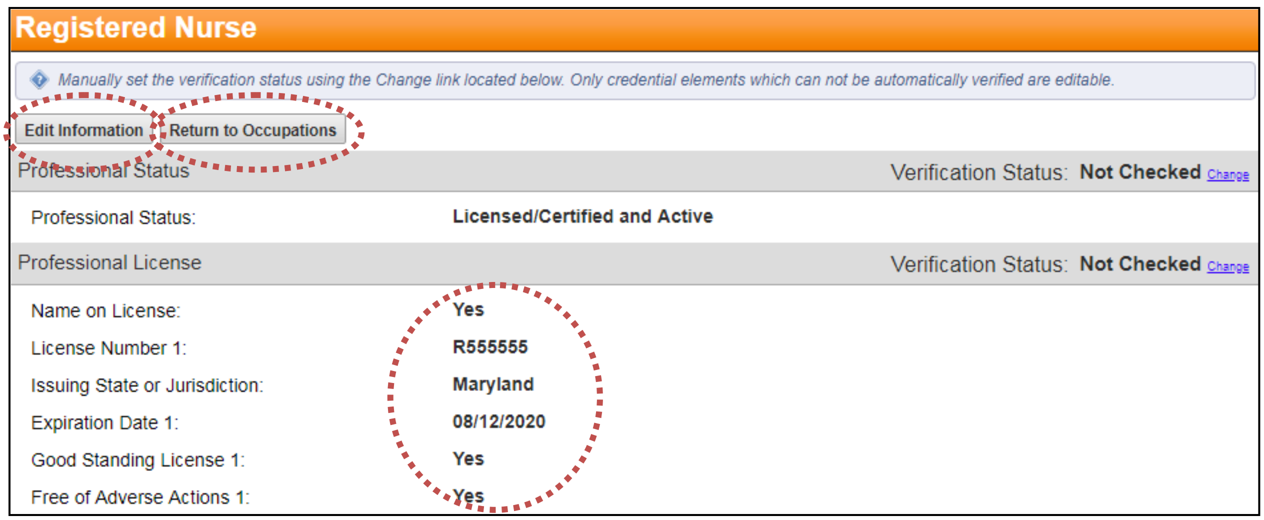
7. Click **Save Changes**

8. Scroll up and select the **Return to Occupations** button.
   - If you have a second occupation, add this occupation

9. For those with two occupations, ensure the occupational role you want to perform during deployment reflects an **Occupational Rank** of "1" (e.g., Laura is both a registered nurse and emergency planner but prefers to act as a nurse with the MDRMRC)
   - To change occupational rankings, click the arrow under **Occupational Rank**.

10. To delete an occupation, click on the box next to its name, then select the **Delete** button at the bottom left side of the screen and click the **Submit Action** button





D. Edit Your Profile: Training Sub-tab

Audience: Unit Administrators and volunteers

After completing a training course, update the **Training** sub-tab of your **Profile**. Find a list of required and suggested trainings and instructions here: https://mdr.health.maryland.gov/Pages/Training.aspx.

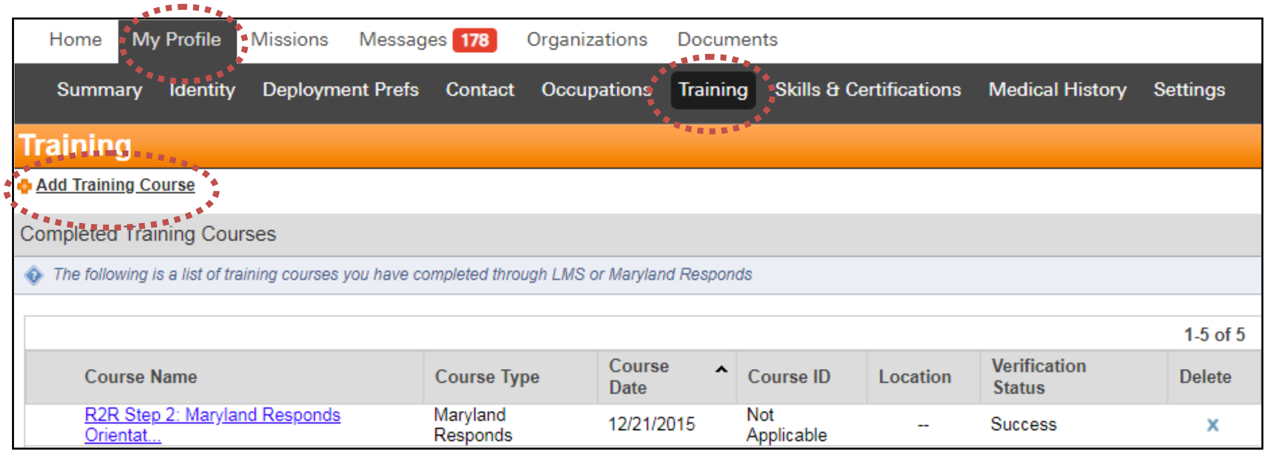
1. Under the **My Profile** tab, select the **Training** sub-tab

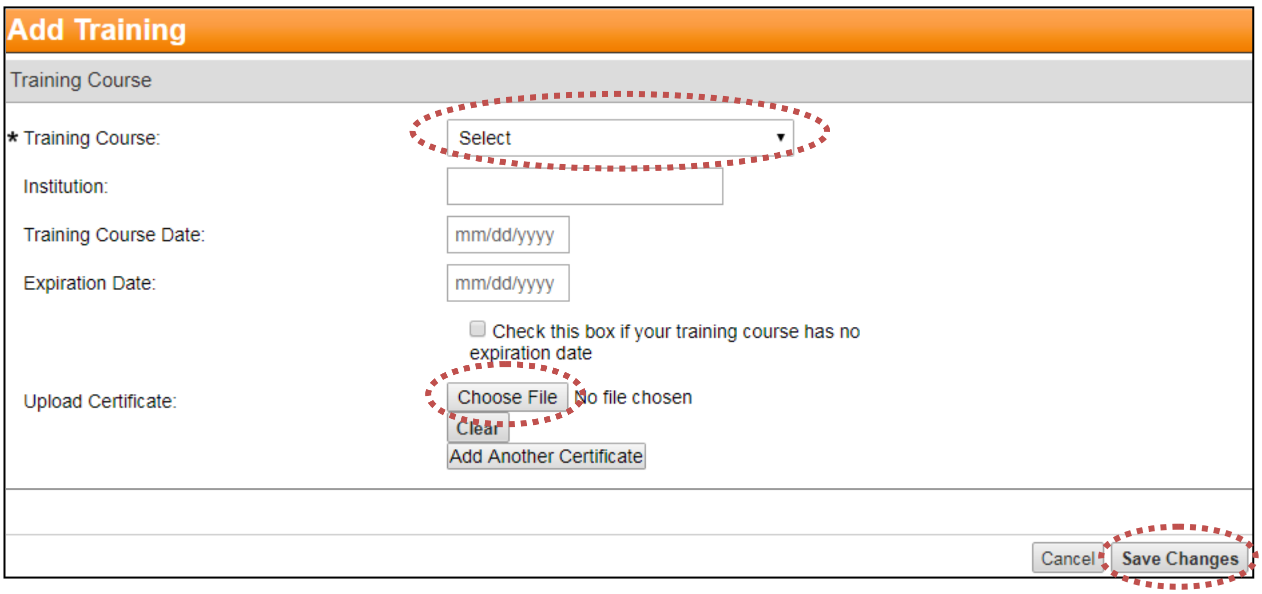
2. Click **Add Training Course** in the upper left corner

3. Select the training course from the drop down menu
   - If your course is not listed choose “Training: Other” from the drop-down menu
   - If the course is not listed and you believe it should be, email a course description and link to mdresponds.health@maryland.gov

4. Complete fields – click the **Choose File** button to upload a training certificate (if applicable)

5. Click **Save Changes**

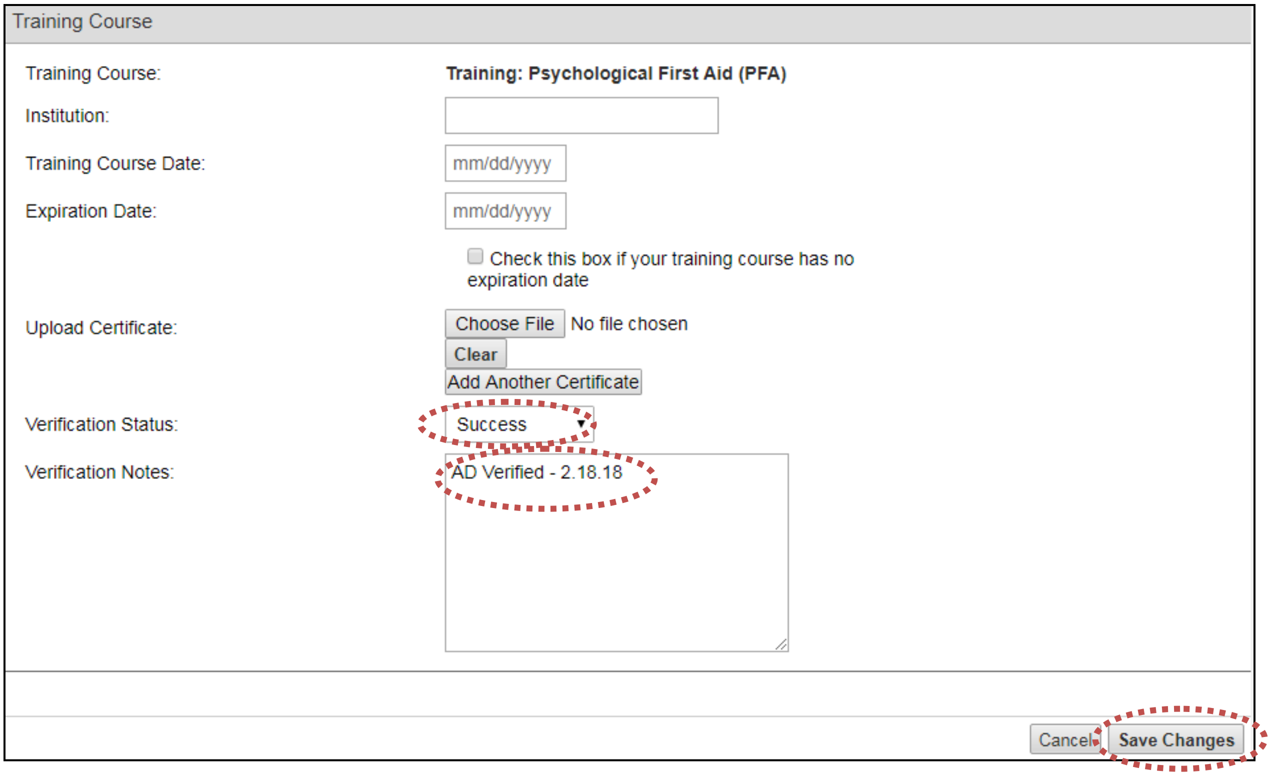




E. Verify Trainings

Audience: Unit Administrators – should verify trainings that are hosted by the local Unit. State Administrators will verify State Program hosted trainings and Road to Readiness steps.

1. Search for a volunteer using the **Responders** tab
2. In the volunteer profile, go to the volunteer's **Training** sub-tab
3. Select training course under **Course Name**
4. Under **Verification Status**, select appropriate box (**Success** if the volunteer has completed the training)
   - If applicable, check certificate to determine status. In **verification notes**, type "[initials] verified-date"
5. Click **Save Changes**



F. Background Check Sub-tab

Audience: Unit Administrators

Currently, the Registry does not have the ability to conduct a complete background check for volunteers. This functionality (under the **Background Check** sub-tab) is scheduled to be added to the Registry in 2019.

CHAPTER 5: REGISTRY PROFILE SETTINGS

A. Edit Volunteer Account Settings

Audience: Unit Administrators and volunteers

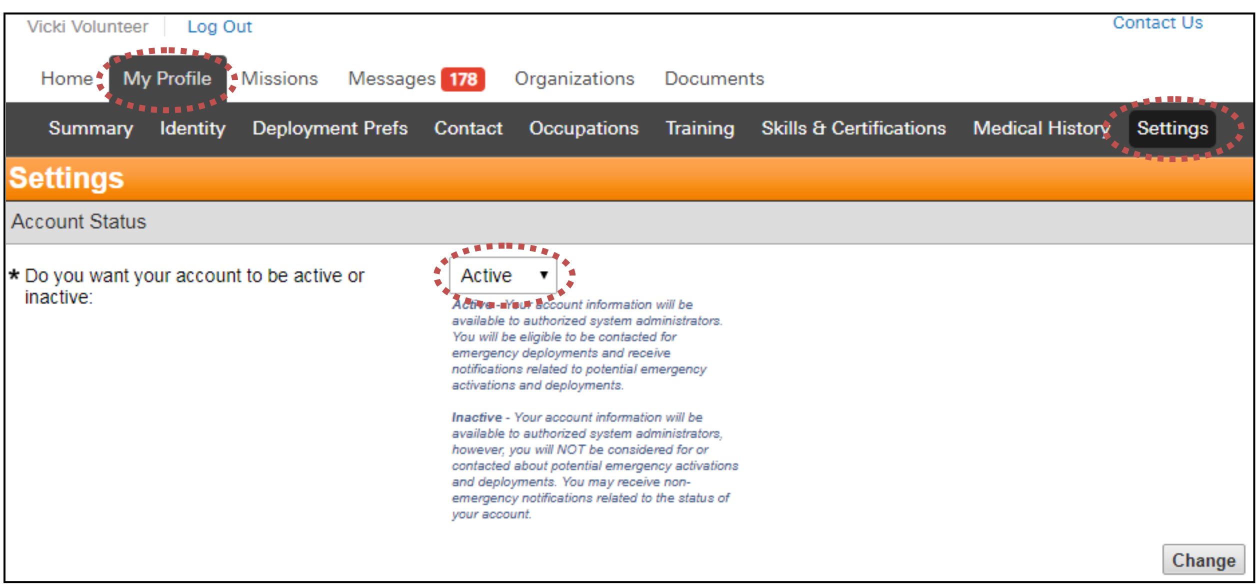
1. Volunteers: Under the **My Profile** tab, select the **Settings** sub-tab
   Unit Administrator: In a volunteer profile, select the **Account Settings** tab

2. Here you can view and change the **Account Status**
   - **Active**: Volunteers with active accounts are eligible to receive notifications related to activations
   - **Inactive**: Volunteers will not be receive notifications regarding activations or trainings, but will be able to log-in to the system to change status
   - **Closed**: Volunteers will not be able to log-in to profile

3. Upload profile photo
   - Only Administrators have the ability to upload photos in this section
   - Volunteers may upload a photo to the certificate section of the **R2R Step 4: Photo for ID Badge** training under the **Training** sub-tab

4. View your **System Role** – only State Administrators have the ability to change **System Role**
   - **Responder**: Can create and update personal profile information, view mission information when assigned, view messages, and create notifications to Administrators
   - **Local Administrator**: Can create missions and notifications, and accept or reject volunteers within their organization
   - **System Coordinator**: Can perform all functions available on the Registry, view all volunteer profiles state-wide, and send state- or region-wide activation requests

5. **Username** and **Password**:
   - To change your username, go to **New Username**, enter a new username, and click **Change**
   - If you would like to change your password, use the guidelines provided in the system to choose a new password. Select a secret question from the drop-down list and enter your answer. If you forget your password in the future, you will be asked this question.



B. Upload Volunteer Photo

Audience: Unit Administrators

1. Ask volunteers for a recent head shot fulfilling these guidelines:
   - Photo taken within the past six months
   - Full face, front view
   - Color
   - Solid background
   - No hats or headgear (other than for religious purposes) obscuring the hair or hairline

2. Under the **Account Settings** tab in the volunteer's profile, scroll to the **Responder Photo** section

3. Click the **Choose File** button to select a photo

4. Once you have chosen the photo file, click **Upload**.
   - The photo will now appear on the **Home** tab of the volunteer's profile

C. Reset Volunteer Password or Username

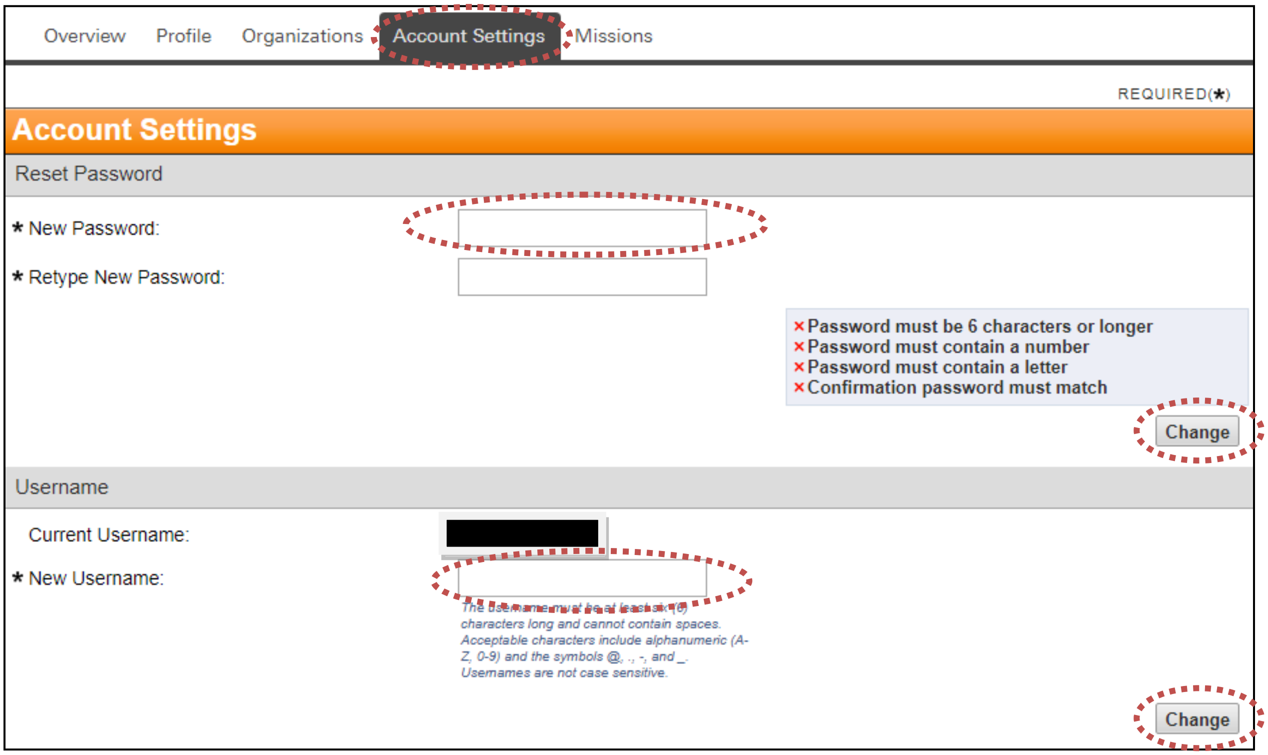
Audience: Unit Administrators– can reset passwords and usernames for volunteers. Alternatively, the Unit Administrator can instruct the volunteer to email mdresponds.health@maryland.gov for a State Administrator to reset the password or username.

1. To confirm identity, ask volunteer to give you date of birth and primary address and check to make sure their answers correspond with the volunteer's profile

2. Search for volunteer using **Responder** tab

3. Go to their **Account Settings** sub-tab
   - **Reset Password**: Reset the password temporarily to “Welcome19” and click **Change**
   - **Username**: Type in the new username from the volunteer and click **Change**

4. Email the volunteer the updated information and ask them to sign-in with the temporary password and/or username
   - The volunteer will need to reset the temporary password once they log-in



CHAPTER 6: VOLUNTEER SEARCHES

A. Find a Specific Volunteer

Audience: Unit Administrators

1. Go to the **Responders** tab

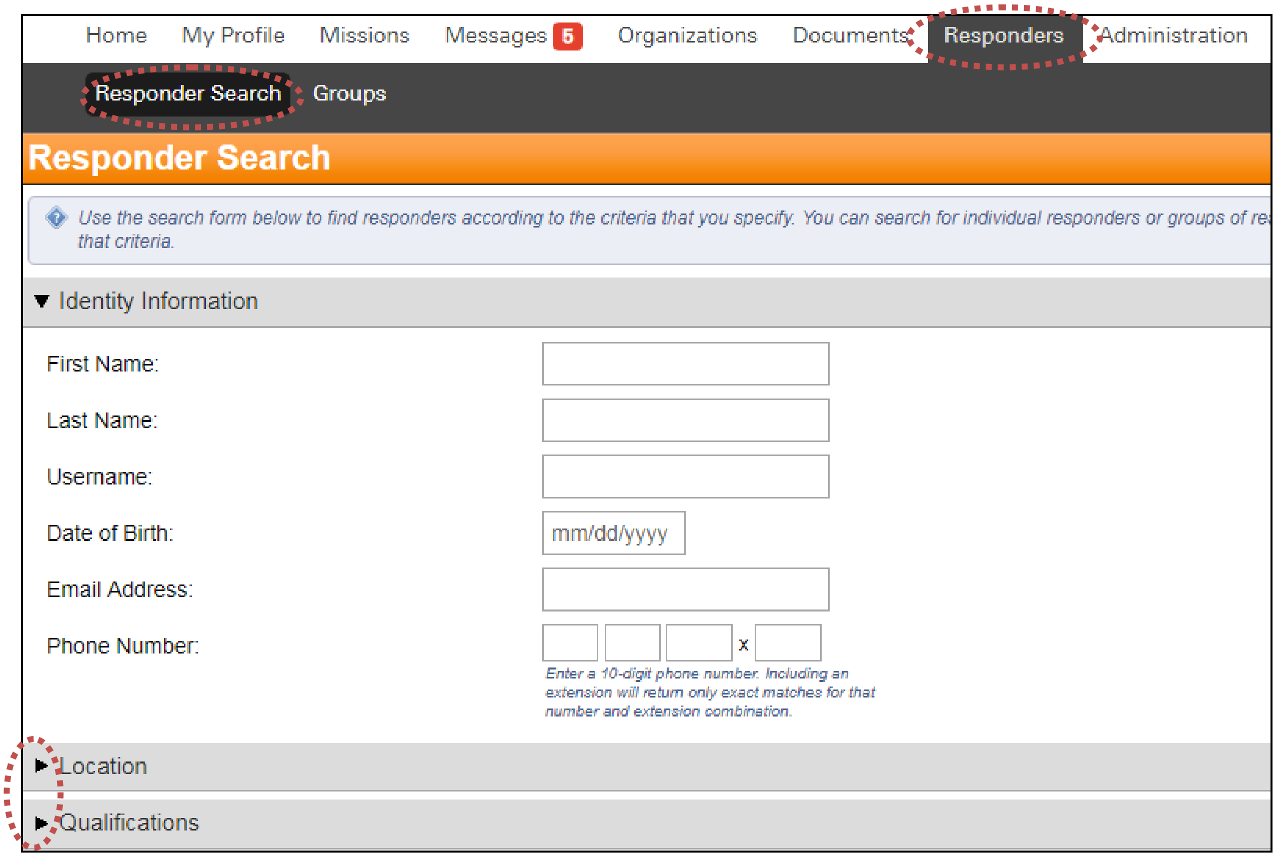
2. Enter the search criteria in the desired fields
   - Click the triangle to the left of the section titles to expand

3. Click the **Search** button in the lower right corner of the page
   - Note: The fewer fields you complete, the more results the search may yield
   - To modify the initial search criteria, click the **Refine Search** link in the upper left corner of the page
   - Unit Administrators can narrow searches by occupation, training, group and in many more ways

4. On the **Search Results** page, check the boxes to the left of the names to select multiple volunteers
   - To select all volunteers, use the **Check All** drop-down menu to specify whether you want to select Responders* on the first page or across all pages

5. On the **Search Results** page, use the **Sort By** drop-down menu to sort the results by volunteer name, occupation, residence, or zip code

**Note: In the Registry, registered volunteers are called "Responders."*



B. Filter by Subtopic – Trainings and Occupations

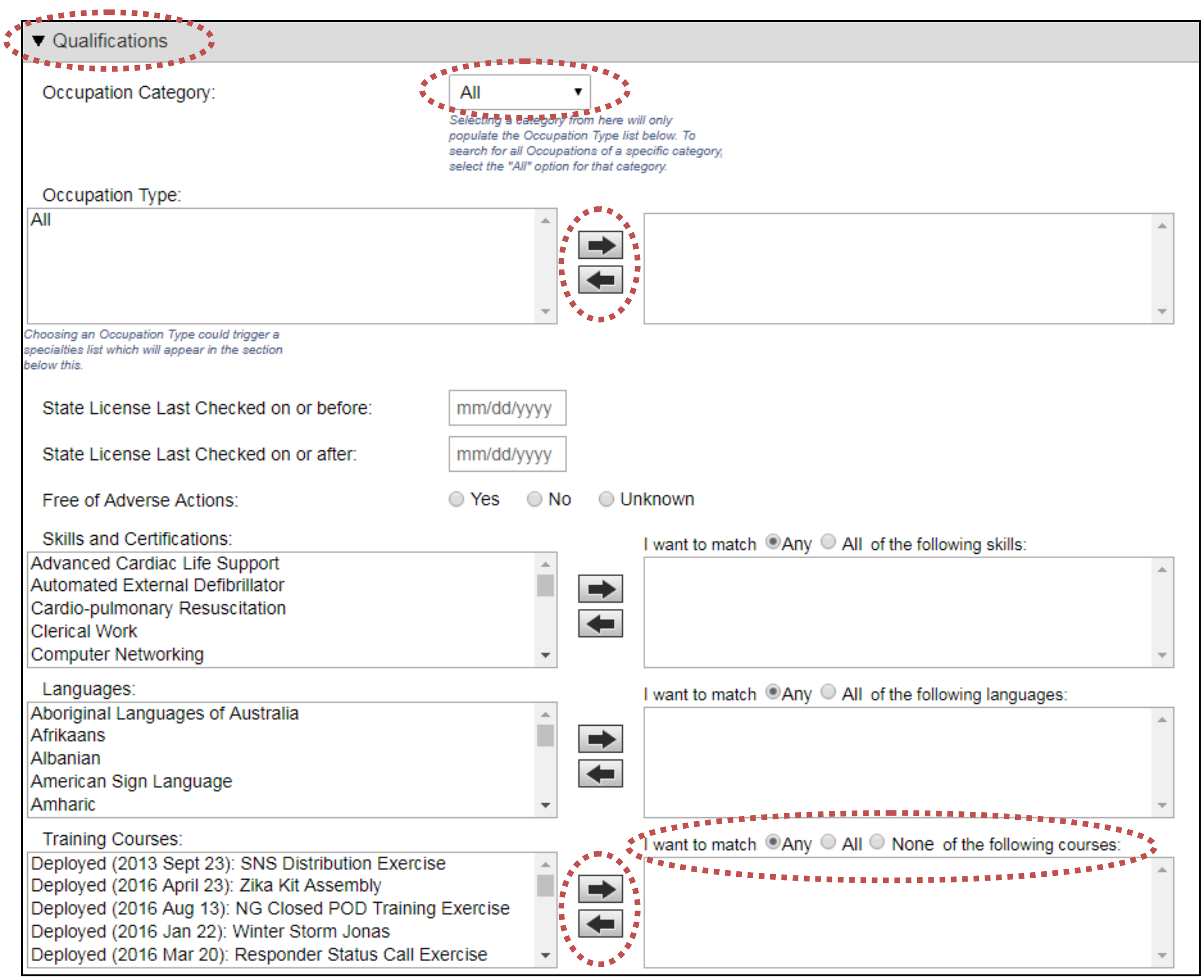
Audience: Unit Administrators

1. Go to **Responders** tab

2. Scroll down to **Qualifications** and click the triangle to expand

3. Occupation: Under **Occupation Category**, choose **Medical, Non-medical** or **All**, select **Occupation Type** (e.g., registered nurse, physician, etc.), and then click the arrow pointing right
   - The occupation will move to the box on the right
   - Scroll down to select **Search** and your **Search Results** list will be populated with all of the volunteers in your jurisdiction who have listed your selected occupation

4. Training: From **Training Courses** box, select your course of interest (alternatively, you can search by **Skills and Certifications** or **Languages**), then click the arrow pointing right
   - The selected training will move to the box on the right
   - At the top of the right box, select if you want to match **Any**, **All**, or **None of the following courses**
   - Scroll down to select **Search**

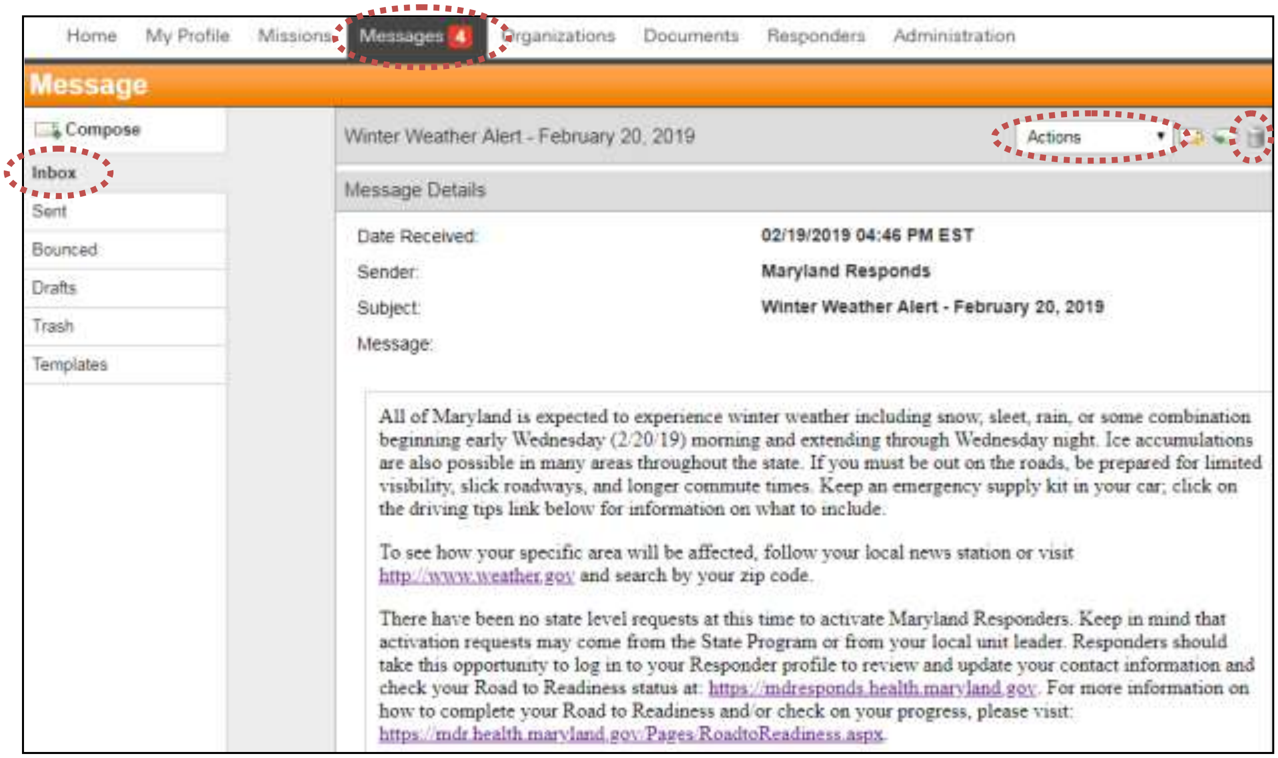


CHAPTER 7: REGISTRY MESSAGING

A. Check Messages

Audience: Unit Administrators and volunteers

1. Go to the **Messages** tab and click the **Inbox** left-side tab
2. Click the subject line of a message to open and read the message
3. The **Actions** drop-down menu allows you to: reply, forward, mark as read, or mark as unread
4. The trash can to the right of the **Actions** drop-down allows you to move the message to **Trash**



B. Compose a Message

Audience: Unit Administrators

1. Go to the **Messages** tab and click the **Compose** left-side tab
2. Enter the message information in the fields and modify **Message Details** and **Advanced Delivery Options** as needed (see below)

Message Details – Highlights

For full explanation of **Message Details**, refer to the Registry **Help Center**.

- **Select Template**: You can choose a previously created template to structure your message. See below for how to create a template.
- **Sender:** Specify the sender of the message: **Organization** = your local Unit, **Myself** = you.
- **Communication Type:** To clearly identify and differentiate the importance of messages in a recipient's inbox, specify the communication type. Types include Non-emergency/General, Emergent, Exercise/Drill, and Alert Notification. Depending on which is selected, the message body may contain built in phrases (e.g. "Exercise, Exercise, Exercise, etc.).
- **Recipients:** To add recipients by search: Click the **Add Recipients** button to open the **Search Center**. Specify whether you want to search for individuals, administrators, groups, or organizations (For organizations, you can only add your own unit). Enter the search criteria and click **Search** (if more specific search fields are needed, click on **Go to Advanced Search)**. From the search results, select the desired entries and click **Add**. The **All Recipients** field will be populated with your selections.
- **CC Via Email:** To add recipients who are not registered in the Registry: Click "Yes" to open the **External Recipients** field. Type in the email addresses of the external recipients. Separate addresses with commas.
- **Subject:** As if you were sending an email, enter a subject for your message.
- **Long Message:** Options for sending long messages are to email, fax, and internal. Email and internal will be automatically selected and you cannot deselect these. Enter in your long message into the space provided.
    - **Internal Message:** Internal messages are delivered through the Registry and to the Registry inbox of recipients.
    - **Email**: This method sends the message to the external email account specified in the volunteer's profile.
    - **Fax:** The character limit for the fax is 1000 characters, so the message has to be concise and to the point. Not recommended because of additional charges incurred.
- **Add Attachments:** Click the **Add Attachments** button underneath the **Long Message** section to select a file and attach it to the message. You can upload from your files or from the **Documents Library**. For the former, click the **Choose File** button and then select the document to attach. For the latter, click the **Document Library** tab. Select a file using the checkboxes next to each file. Click **Select File** to attach the file. Limit of 4 attachments.
- **Short Message:** These messages include text and pager messages. The character limit for the short messages is 200 characters.
    - **Text Message: Reserved for emergency call outs or annual notification drill only.** Message will be delivered to the recipient's cell phones as a text message if they have added an SMS/Text Msg number to their profile. In the text message, Unit Administrators may wish to direct volunteers to check their email for more information.
    - **Pager:** This message will be delivered to recipients who specified pager numbers. If you go over the limit, your message will be split and sent to the recipient as multiple messages. Use the short message to restate the main points of the long message.
- **Voice Message/Phone: Reserved for emergency call outs or annual notification drill only.** You can record your own message, upload an audio file, or provide message text that will be converted to a recording using text-to-speech technology. Voice messages are delivered to the recipient's phone. Selecting the **Phone** check-box activates a type of phone list and a **Voice Message Body** field. Limit the message to 2000 characters.

Advanced Delivery Options

- **Delivery Delay:** Specify the time between the message delivery to email and delivery of the message to phone, pager, or other text devices.

- **Send Time:** Specify whether you want to send the message **Immediately** or delay the message delivery until a certain time. If you select **Delay Until**, specify the date, hour, and minute to send the message.
- **Priority:** Set the message priority to **Norma**l or **High** (only used for emergencies).
- **Message Delivery**: These options control how the message is delivered to the recipients. You can specify these options for every message you send.
    - **Escalation**: The system will consecutively send the message to the recipient's contact numbers in order of their priority. For example, if the recipient has specified his or her work phone as a primary contact method, and cell phone as the secondary contact method, the message will be delivered to the recipient's work phone first, and, after some time, to the recipient's cell phone. When you compose a message, you can specify the time intervals between the attempts to contact the recipient.
    - **Blast**: This option sends the message to all contact methods selected at the same time to each recipient.
- **Time this message is available for response**: Use the drop-down menu to specify how many hours the message will be available for retrieval and response. If a response option is included with the message, recipients cannot respond to the message after the number of hours specified.
- **Validate recipient?** Specify if the recipient needs to confirm their identity once the message is received. If you select **Yes,** the recipient is prompted to confirm their identity before they can listen to the phone message.
- **Leave Voice Message:** Specify whether a voicemail should be left if the recipient does not answer the phone.
- **Do not recontact if:** Specify the conditions necessary for the system to stop trying to contact the recipient. This applies to voice messages only.
- **Number of times to contact:** Specify how many times you want the recipient to be contacted when attempting to deliver the message. Note: this means how many times you want the system to cycle through all the contact methods selected.
- **Time between each contact attempt:** Specify time intervals between the attempts to contact the recipient.
- **Request a response?** Specify if you would like the recipient to respond to the message. Provide additional response options if necessary and enter the description of each option. If applicable, provide the phone numbers you want the recipients to call as a part of their response. Note: the phone numbers do not appear in the internal message.
- **Response Options:** If you send messages that require recipients to respond, you can make the response tools immediately available to the recipients. The **Response Options** section on the message page offers you available response settings.

3. Click **Send**
    - Note: It is recommended that Unit Administrators preview and test messages before messages are sent (see Section D of this chapter)

C. Message Templates

Audience: Unit Administrators

1. Go to the **Messages** tab and click the **Templates** left side-tab
    - Review available templates to prevent redundancy

2. To create a **Message Template**, you have two options:
    a. Compose a message and save it as a template by selecting the **Preview and Test** button at the bottom of the **Compose** message screen. Select the small disk icon with a letter 'T' at the top right of the **Preview and Test** screen to save message as a template.

b. Set up a template from the start by selecting **Create Template** in the **Templates** side-tab. Complete the fields. Under **Viewable By,** specify if you want to limit access to the template's creator (you), Unit Administrators, or System Coordinators (State Administrators). Click **Save**.

D. Preview and Test Messages

Audience: Unit Administrators

1. After composing a message, click **Preview and Test** at the bottom right-hand side of the page.
2. To send a copy of the message to yourself before the recipients, click the **Test Message** button on the upper right-hand side of the screen
3. Specify the message delivery method and contact information
4. Click **Send Test Message** and check your devices for the message

E. View your Sent Messages

Audience: Unit Administrators

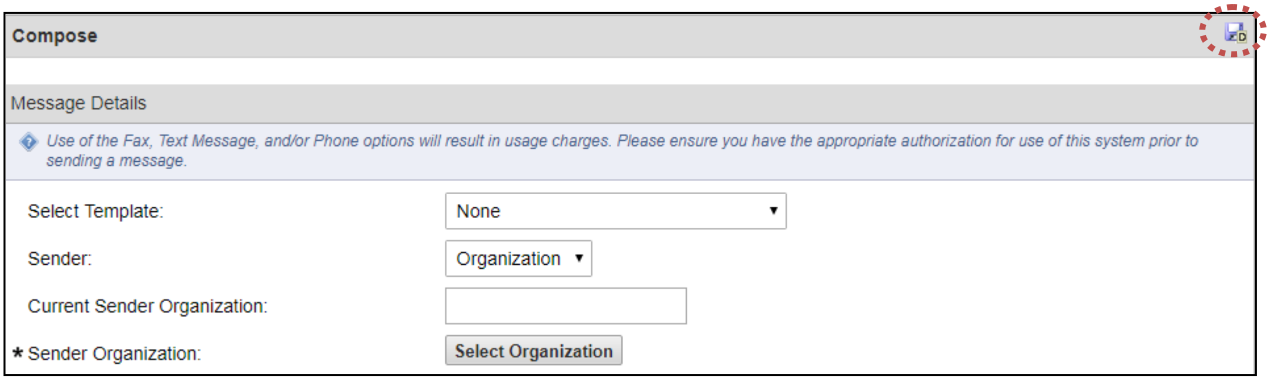
1. In the **Messages** tab, click the **Sent** left side-tab
2. Click the message you want to see and a **Message Summary** will be opened which shows summary statistics of recipients, delivery, and responses
3. To view more detailed recipient and delivery data click the triangles next to each section.
   - **Recipient Statistics: All Recipients:** This section shows recipient responses over time and responses by delivery method
   - **Recipient Statistics: By Containers:** This section shows each container (organization, group, or other set of associated individuals) that was added to the message when it was composed and also shows the number of individual recipients within that container, and delivery and response statistics for each container
4. To view the options that were selected when the message was sent, click the triangles next to the **Advanced Delivery Options** and **Message Details** sections
5. **View Recipients** by going to **Message Details** and clicking **Total Recipients**
   - For explanation of **Delivery Status**, refer to the **Help Center**
6. Use the **Actions** drop-down menu to perform the following actions: save message as **Template**, **Export** the message, or export the message to the **Document Library**

F. Drafts

Audience: Unit Administrators or volunteers

1. To save a message as a draft to edit later, click on the disk icon with the 'D' on the right-hand side in the **Compose** sub-tab

2. To view a saved draft, in the **Messages** tab, click the **Drafts** left side-tab. Click the subject line of the message you want to view



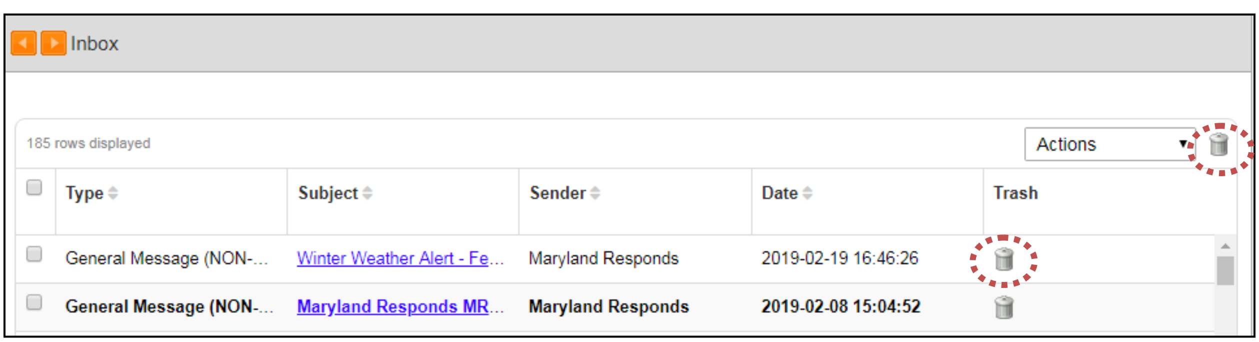
G. Trash

Audience: Unit Administrators or volunteers

1. To move multiple messages to **Trash**, select the messages in the **Inbox** side-tab and click the trash icon in the upper right corner of the page.

2. To move messages to **Trash** individually, click the trash icon in the corresponding message rows.

3. To view deleted messages, go to **Messages** and click the **Trash** left side-tab



CHAPTER 8: LOCAL UNIT MANAGEMENT

Local Units are known as "organizations" in the Registry. For Maryland, these organizations represent the 24 local Units in each county in Maryland and Baltimore City. All local Unit organizations fall under the larger Maryland Responds MRC State Program organization which includes all registered volunteers across the state. Only users with the highest level of permissions, such as State Administrators, can create organizations and view all organizations within the Registry.

A. Edit Organization Details

Audience: Unit Administrators

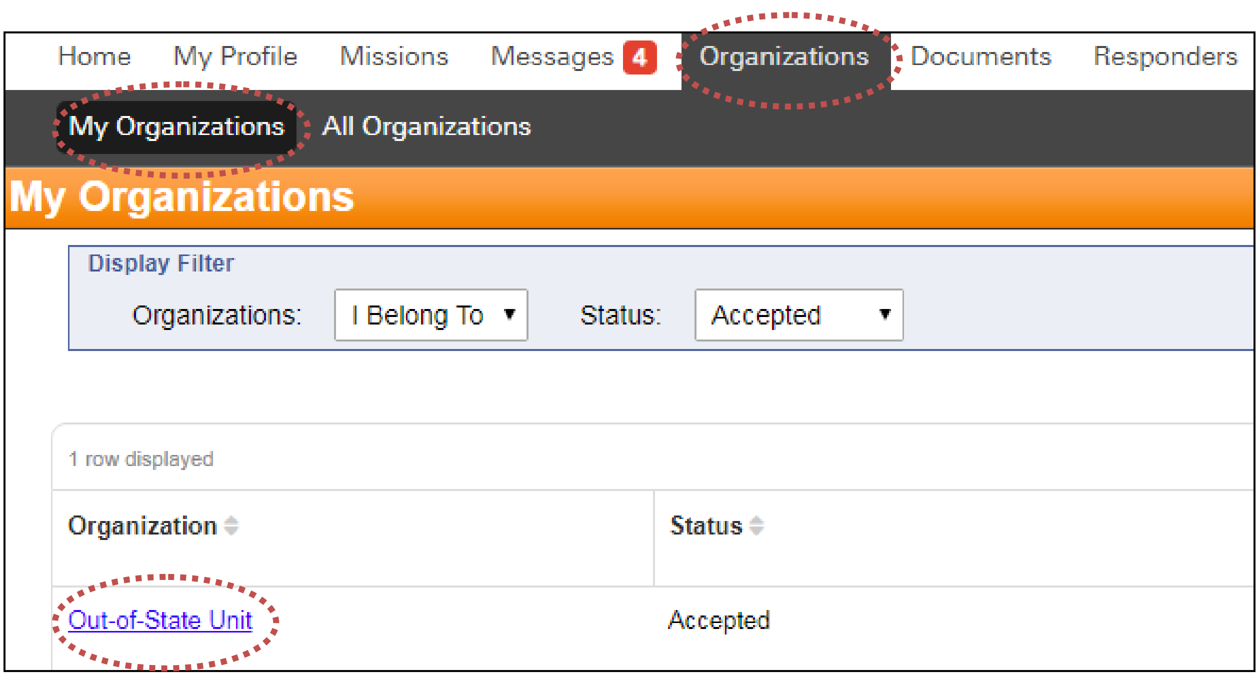
1. Under the **Organizations** tab, **My Organizations** sub-tab, click your linked organization name to open up your organization **Dashboard**

2. Click the **Details** tab in the left side panel

3. Click the Edit link in the upper left corner

4. Edit the organization information. Please note these comments about these specific fields:
   - **Name**: Your local Unit's name
   - **Description**: Your local Unit's MRC mission
   - **Current Picture**: Upload your local Unit's logo – NOT your personal head shot
   - **Contact Information**: Enter contact information for your local Unit (email, phone, address, etc.)

5. Click **Save Changes**



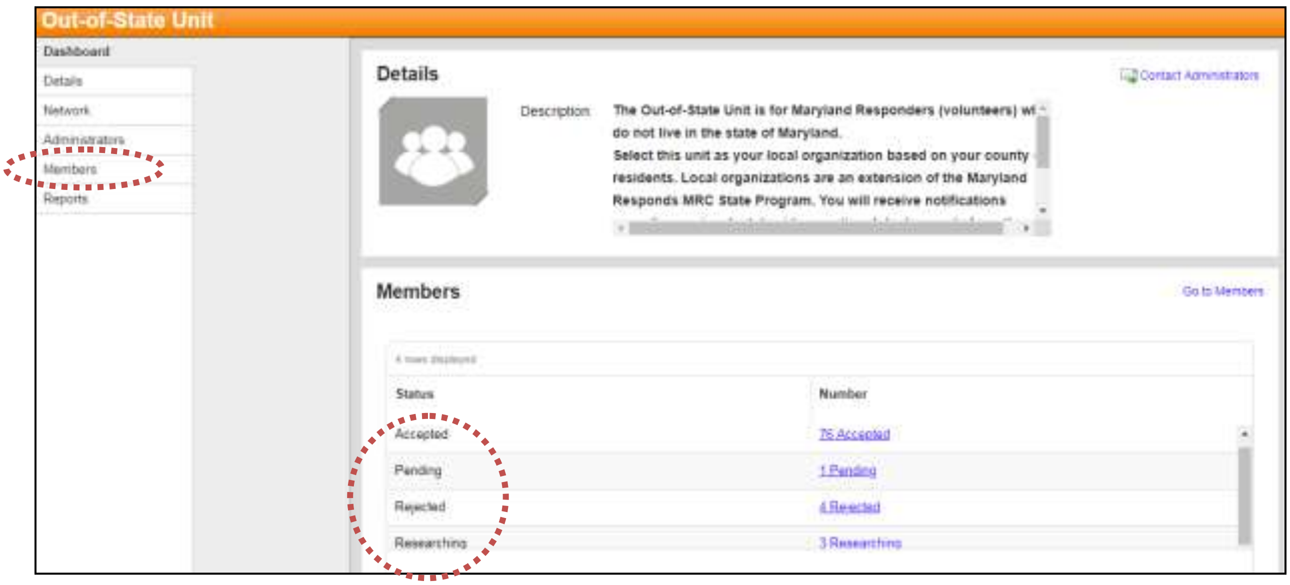
B. View Membership Status(es) for an Organization

Audience: Unit Administrators

1. Under the **Organizations** tab, **My Organizations** sub-tab, click your linked organization name to open up your organization **Dashboard**

2. The **Dashboard** shows you membership statuses for all volunteers who have requested membership in your organization
   - **Pending**: Administrator has not taken any action on volunteer's request to join
   - **Rejected**: Volunteer was denied/transferred
   - **Accepted**: Volunteer is part of and can view details and contact information of organization
   - **Researching**: Administrator is gathering information to determine if volunteer qualifies

3. Clicking the **Members** side-tab in the left panel will show you details and names of all your volunteers
   - Change the **Status** drop-down menu to view different volunteers who fall under different statuses

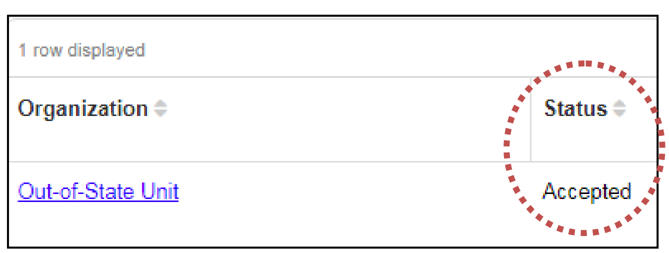


C. View Organizations You Belong To

Audience: Unit Administrators and volunteers

1. Go to the **Organizations** tab; your listed organization usually corresponds to your county of residence

2. The **Status** column tells you if you've been accepted, rejected, or are pending membership in the organization



D. Add Members to Organization – Accept Pending Volunteers

Audience: Unit Administrators

1. Under the **Organizations** tab, **My Organizations** sub-tab, click your linked organization name to open up your organization **Dashboard**

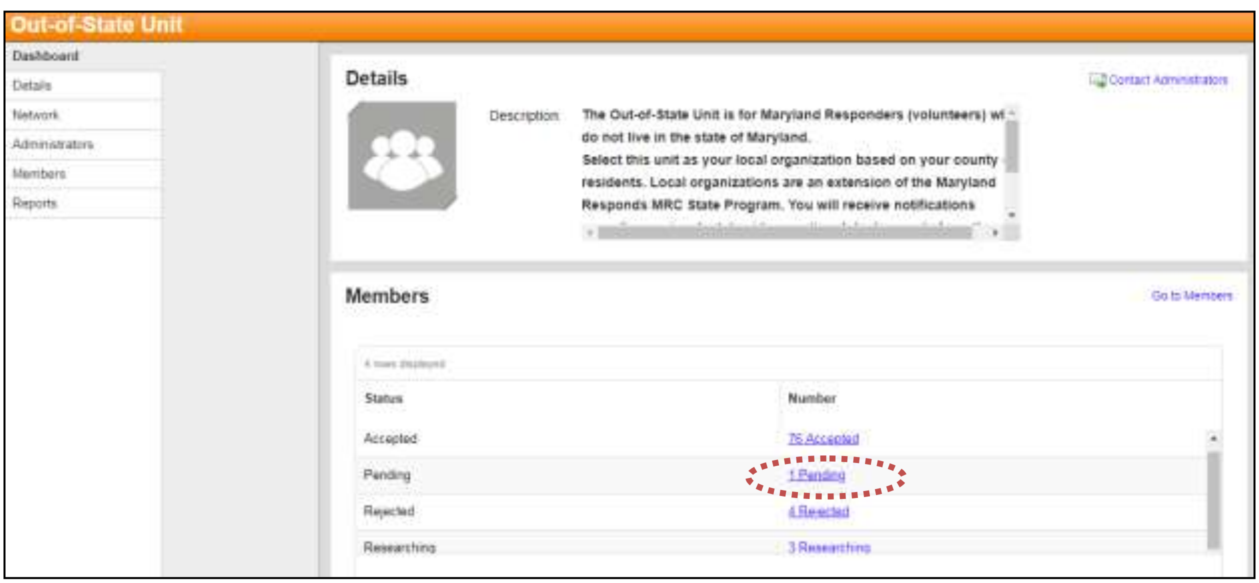
2. Under the **Members** section of the **Dashboard**, click the **Pending** link

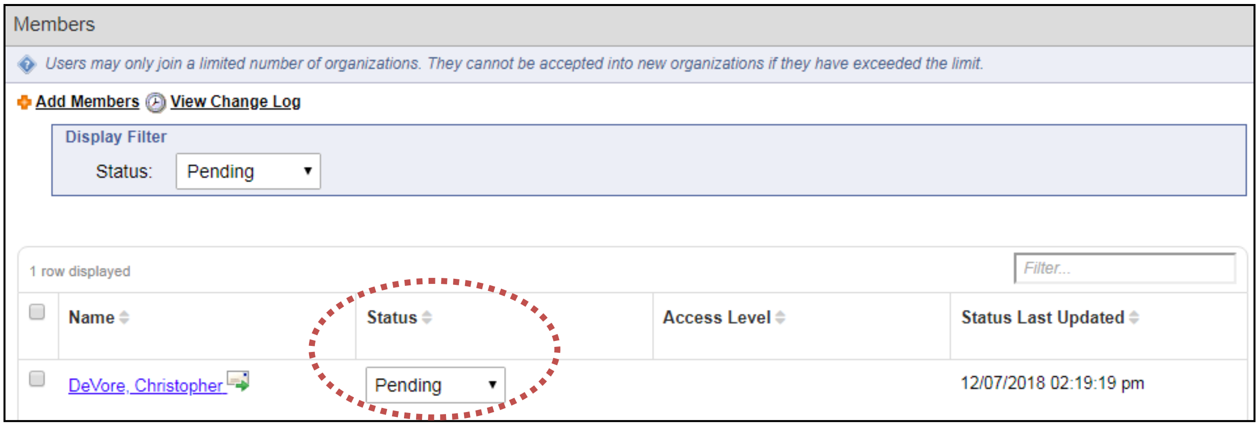
3. The **Members** page opens displaying all volunteers who requested membership and are pending acceptance

4. Click each volunteer's name to look under their **Identity** tab to verify their place of residence

5. If the volunteer's residence matches your Unit, they can be accepted by using the **Status** drop-down to select **Accepted**
   - If a Unit Administrator sees that a volunteer does not belong in their unit due to residence or believes a volunteer poses a reason for concern and should not be accepted into your MDRMRC Unit, contact mdresponds.health@maryland.gov
   - Do NOT reject volunteers from your organization without conferring with State Program Administrators

6. Send newly accepted volunteers a welcome message that includes information on completing the Road to Readiness requirements
   - For a sample welcome message that Unit's can adapt to meet local needs, go to the **Messages** tab, **Templates** side-tab and click on the message "_Welcome Message for New Responders"




Members
Users may only join a limited number of organizations. They cannot be accepted into new organizations if they have exceeded the limit.
Add Members
View Change Log
Display Filter
Status:
Pending
1 row displayed
Filter...
Name
Status
Access Level
Status Last Updated
DeVore, Christopher
Pending
12/07/2018 02:19:19 pm

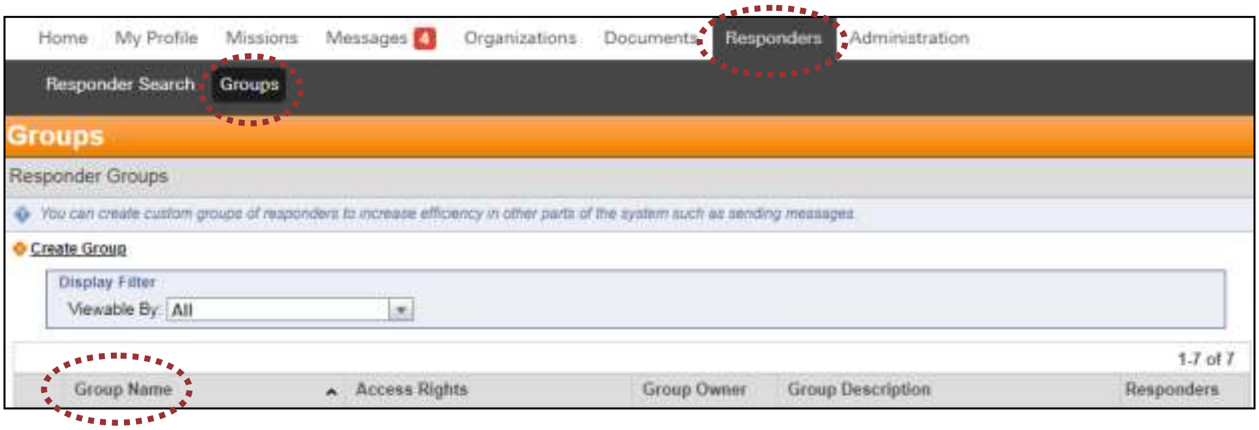
CHAPTER 9: VOLUNTEER GROUPS

Creating volunteer groups can be useful to organize volunteers by similar occupation, training, or skills. Unit Administrators can create groups of volunteers to meet local needs. Unit Administrators can only edit groups for which they have administrative access.

A. Search for Volunteer Groups

Audience: Unit Administrators

1. Go to the **Responders** tab
2. Click the **Groups** sub-tab
3. Click on the group under the **Group Name** column to open the group roster



B. Create Volunteer Groups

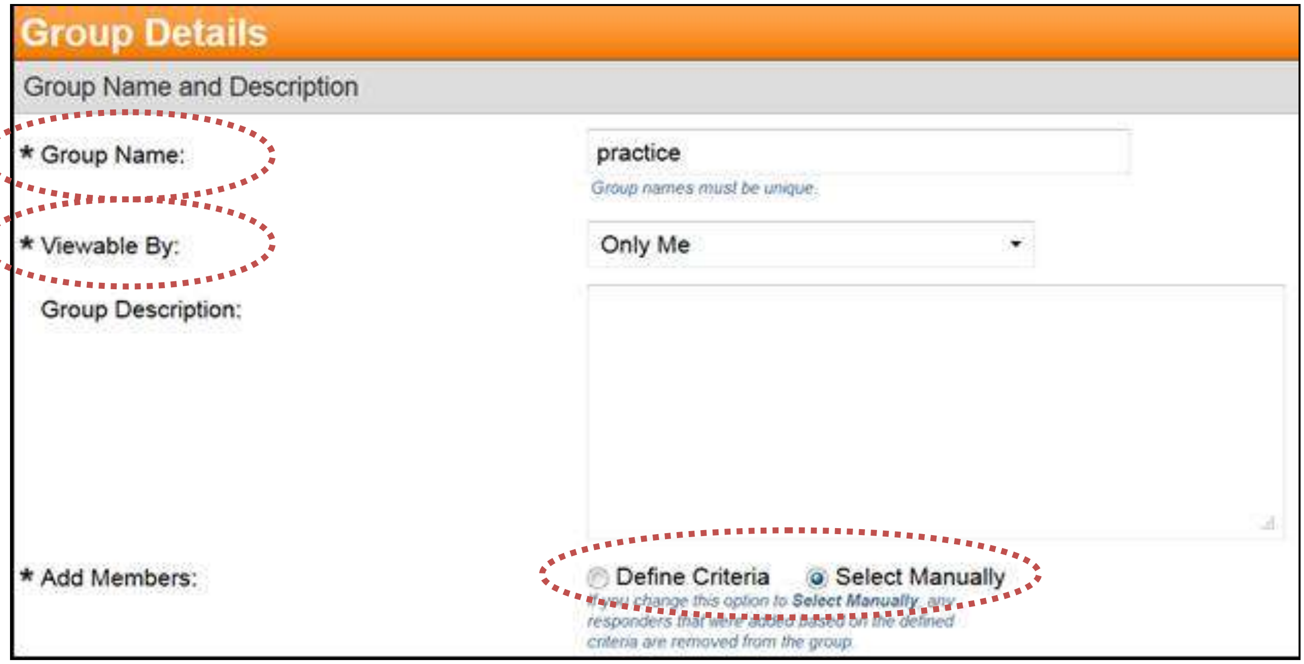
Audience: Unit Administrators

1. Go to the **Responders** tab and click the **Groups** sub-tab
2. Click the **Create Group** link in the upper left corner
3. Enter the group information in the fields paying special attention to these fields:
   - **Viewable By**: Specify who can see the group
   - **Allow other administrators to make changes to or delete this group?** This is only an option if you choose to allow the group to be viewable by other administrators
   - **Group Description**: Explain the purpose of the group
4. **Add Members**:
   - Select **Define Criteria** to add volunteers by occupation, training, organization, access levels, or system roles to the group. The following fields will appear:
     - **Occupation**: Choose either medical or non-medical and move the occupations you would like to select to the right side box using the arrows
     - **Training**: Move the trainings you would like to select to the right side box using the arrows

- **Search by Organizations**: Do not use. Unit Administrators can only view the volunteers in their own organization
- **Search by Access Level**: Use **Access Level Selection** to add an organization's members to the group and the **X** to remove an organization from the field
- **System Role**: Use the arrows to move system roles to the right. This action provides access to the group to users with those system roles

- If you would prefer to select volunteers individually, click **Select Manually** to add members after creating the group

5. Click **Save Changes**



C. Add Volunteers to a Group

Audience: Unit Administrators

1. Go to the **Responders** tab and click the **Groups** sub-tab

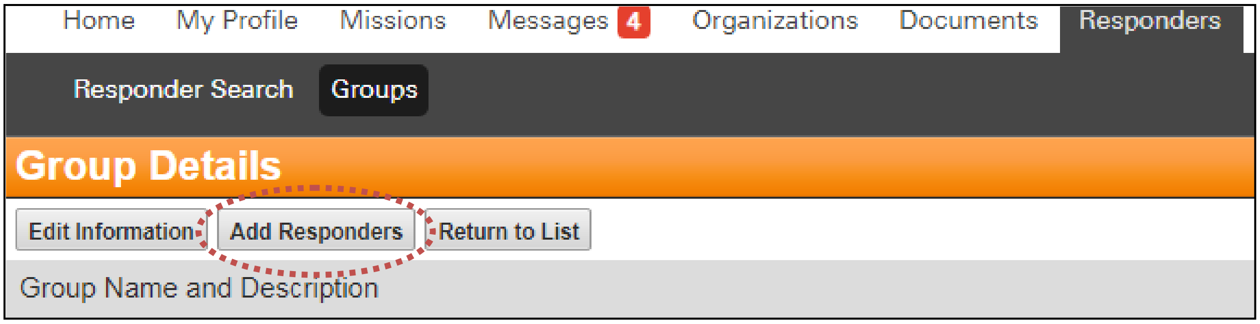
2. Click on the group to which you want to add volunteers

3. Click the **Add Responders** button

4. Enter search criteria in fields. Click **Search**

5. From **Search Results**, select the volunteers you want to add to the group and click **Add Responders**

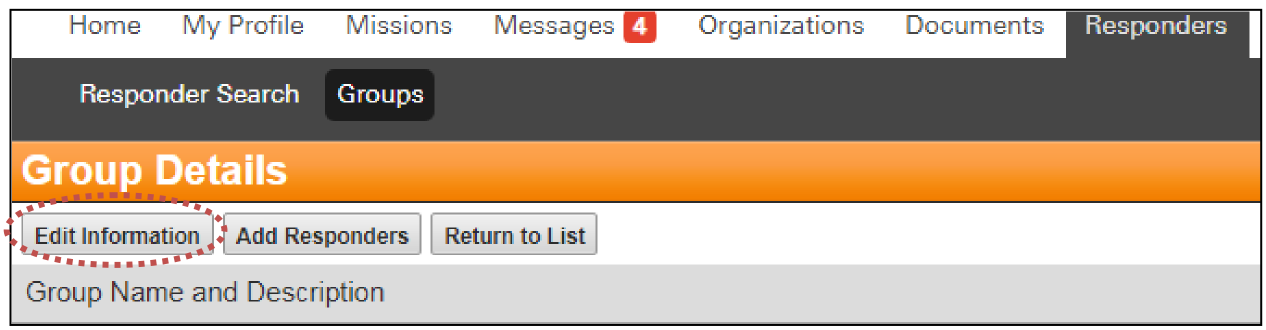
6. Alternatively, you can also add volunteers individually:
   - Click the **Responders** tab and find your volunteer
   - Under results, click the checkbox next to the volunteer's name
   - At the bottom left of page, find **Select an Action** drop-down and select **Add to Existing Group**
   - Select group in the **Group Name** drop-down
   - Click **Submit Action**



D. Edit a Group's Information

Audience: Unit Administrators

1. Go to the **Responders** tab and click the **Groups** sub-tab
2. Click on the group you want to use then click **Edit Information** to edit the group's details
3. Complete fields and click **Save Changes**



E. Delete a Volunteer Group

Audience: Unit Administrators

1. Go to the **Responders** tab and click the **Groups** sub-tab
2. Select the checkbox(s) of the group you want to delete
3. Select **Delete Group** from the **Select an Action** drop down menu (lower left corner)
4. Click **Submit Action**

CHAPTER 10: DEPLOY VOLUNTEERS – MISSIONS

Audience: Unit Administrators

There are two ways to send activation notifications to your volunteers through the Registry. One way is simply by composing a message in the **Messages** tab of the Registry and requesting a response from those who are available to deploy. The second is to use the **Mission Manager** tab. **Mission Manager** can be a good tool to use for complex activations and deployments of volunteers that may involve multiple moving parts (e.g. multiple locations, teams, assignments, etc.). Regardless of which method you use for sending out an activation notification, you should always choose **Request a Response** when sending the message so that the Registry has a way to track who is available and who is not. Follow the instructions outlined below to use the Mission Manager tab. For more detailed instructions, please see the **Mission Manager** quick reference guide located in the Registry **Help Center**.

1. Go to the **Missions** tab and click the **Mission Manager** sub-tab

2. Click **Create Mission**

3. In the **Create Mission** pop-up, complete the fields
   - Create a **Mission Name**
   - Create a **Mission Overview**. Sample text:
     "A significant winter storm is going to affect the state of Maryland from Wednesday (MM/DD/YY) evening through Thursday (MM/DD/YY) night. The system will bring heavy wet snow to the entire state. There is a threat of widespread power outages due to snow load and wind impacts. Maryland Responds MRC volunteers are needed to staff five state Mass Care Shelters. Locations and additional information can be found in the deployment details section."
   - Select a **Mission Type**
   - Click **Add Organizations** and choose your local Unit

4. Click **Save and Create Deployment** which opens the **Create Deployment Group** pop-up

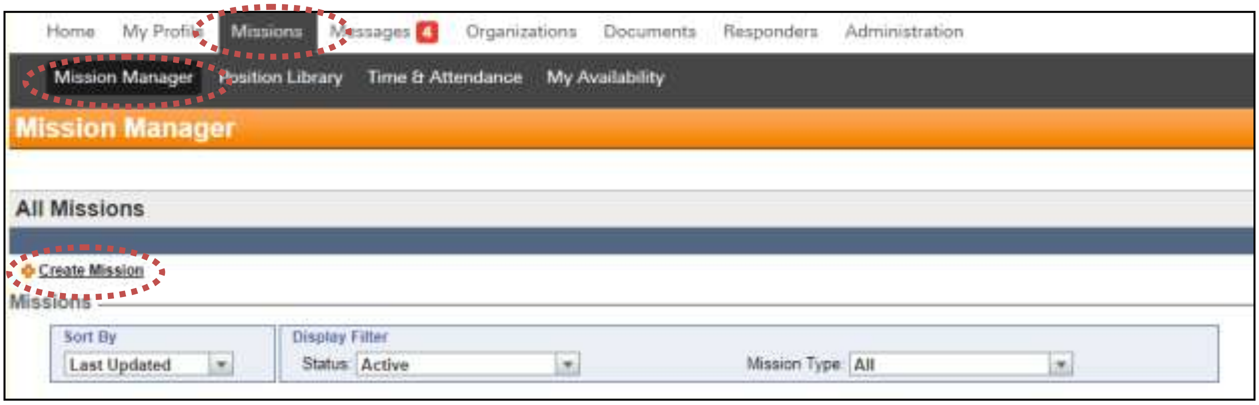
5. Under **Deployment Group Details**, complete fields. Click triangles to expand sections. Pay special attention to:
   - **Positions Needed**
     - Create custom positions and add the desired occupations to the position
   - **Check-in Location and Contact**
   - **Information for Responders** (food, housing, transportation, items to bring (remind volunteers to bring ID badge and polo), additional details)

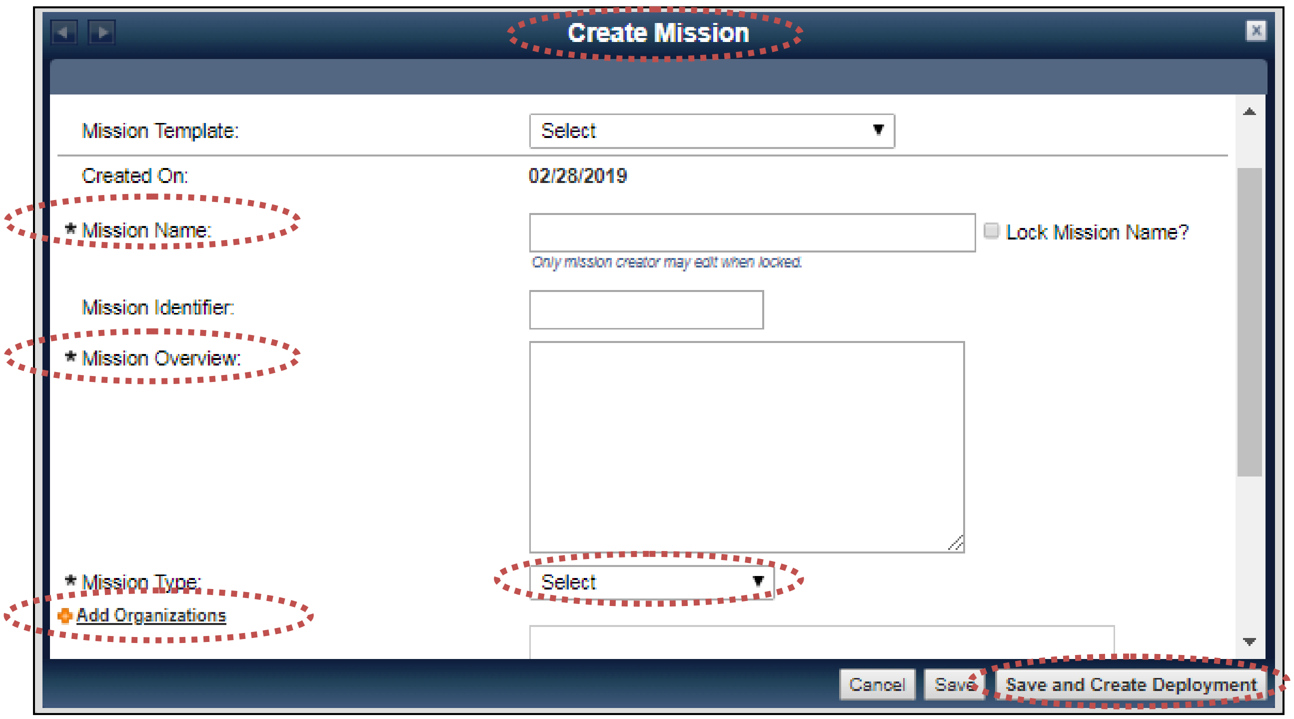
6. Click **Save and Request Availability**

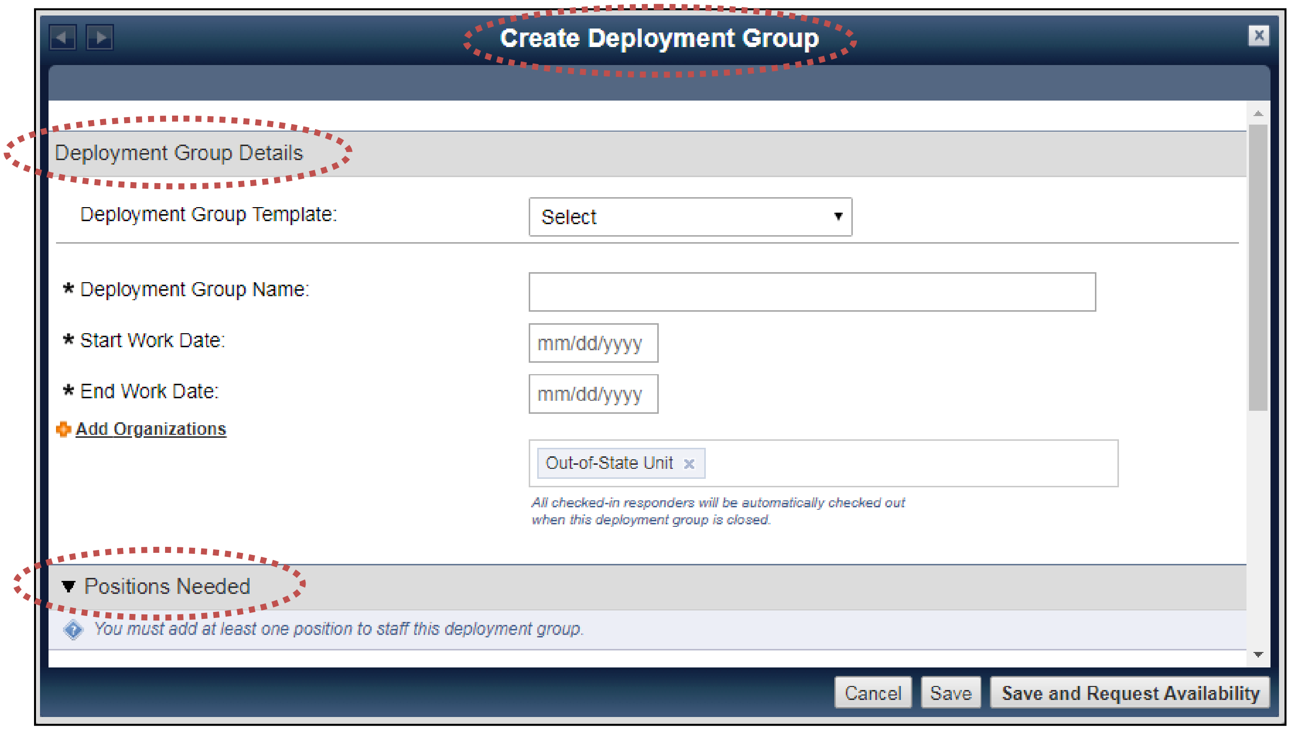
7. A **Message Center** pop-up will appear for you to create your message to volunteers
   - It is recommended that you scroll all the way down on the pop-up screen and select **Go to full message** to open up the full message center and view all the messaging options

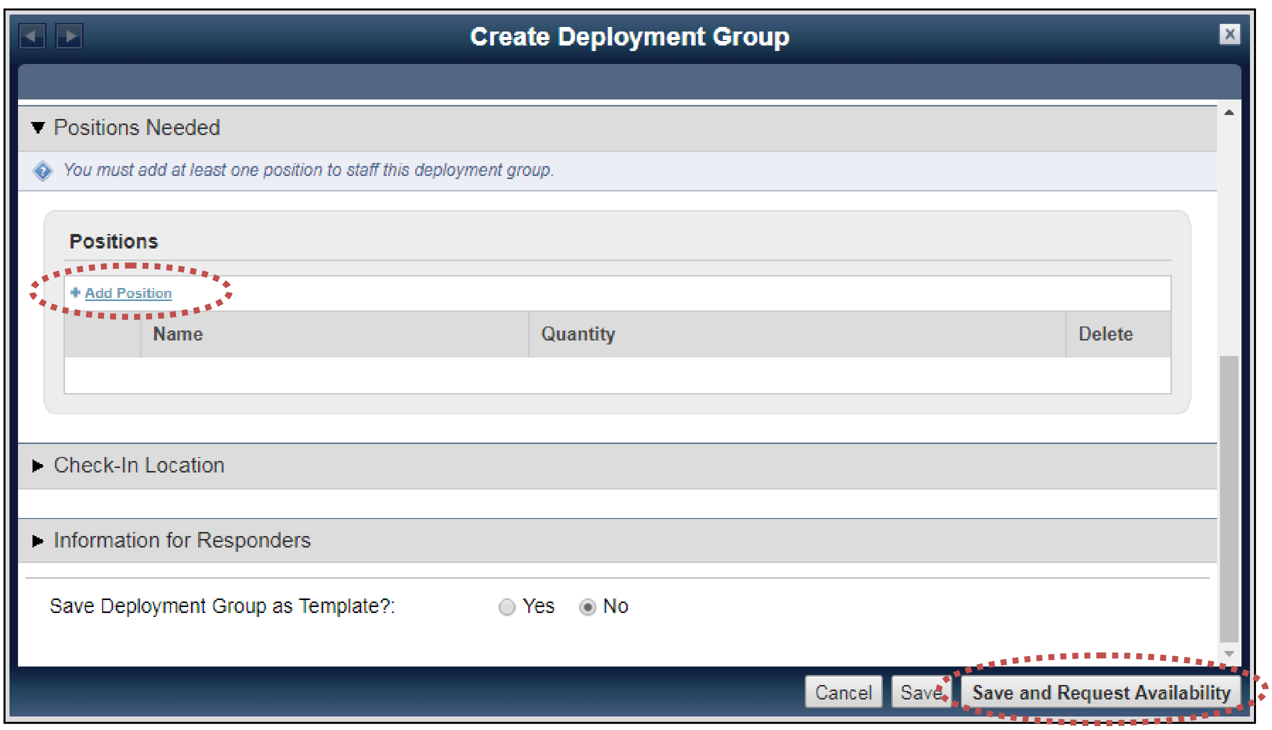
8. Compose your message as you normally would. The **Mission Manager** module pre-populates some information in the **Long Message** section. You can edit or completely remove this language as needed. Be sure to give volunteers instructions on how to respond in the message. Sample text:
   - "This is an availability request for volunteers to support state Mass care Shelters. To respond with your availability, please use the response options below"
   - At this time, activation notifications through the Registry's **Mission Manager** can only be made for one shift at a time. By June 2019, the Registry will be updated to include a new **Schedule**

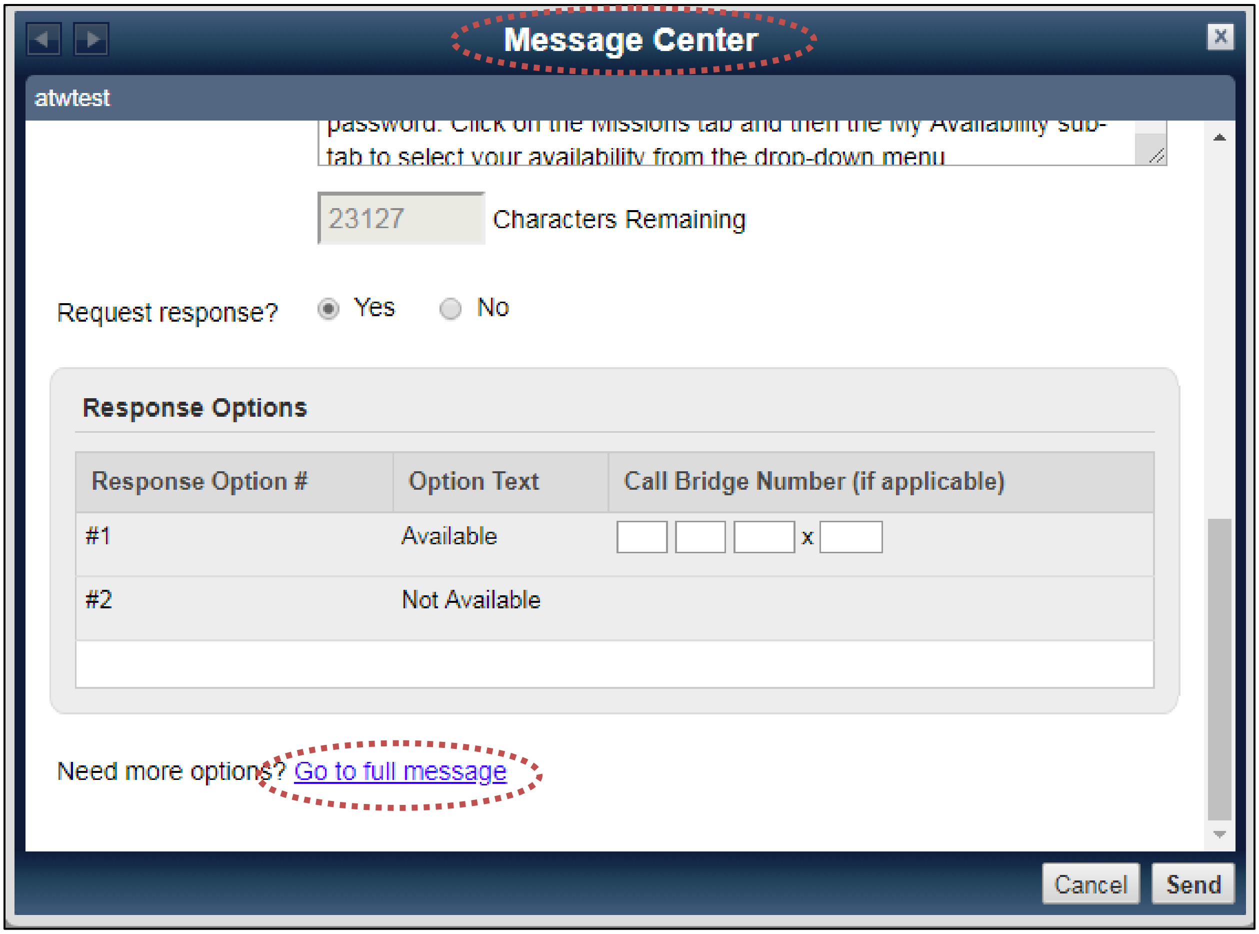
Manager module that will allow for management of multiple shifts. Until then, Unit Administrators can schedule multiple shifts by either creating separate activation notifications per shift, or by using an online scheduling site to poll volunteer availability (e.g. Doodle, Survey Monkey, Google Forms). Once the scheduling poll is created, include the link in any messages sent to qualified volunteers.






Create Deployment Group
Deployment Group Details
Deployment Group Template:
Select
* Deployment Group Name:
* Start Work Date:
mm/dd/yyyy
* End Work Date:
mm/dd/yyyy
Add Organizations
Out-of-State Unit
All checked-in responders will be automatically checked out when this deployment group is closed.
Positions Needed
You must add at least one position to staff this deployment group.
Cancel
Save
Save and Request Availability


Create Deployment Group
Positions Needed
You must add at least one position to staff this deployment group.
Positions
Add Position
Name
Quantity
Delete
Check-In Location
Information for Responders
Save Deployment Group as Template?:
Yes
No
Cancel
Save
Save and Request Availability

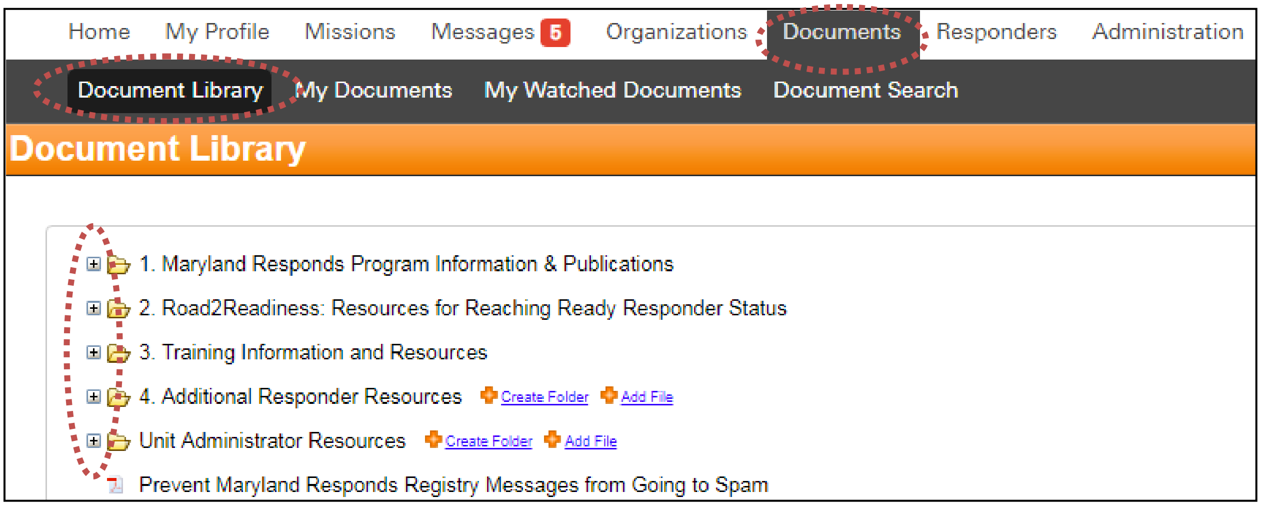

Message Center
atwtest
password. Click on the Missions tab and then the My Availability sub-
tab to select your availability from the drop-down menu
23127 Characters Remaining
Request response? Yes No
Response Options
Response Option # Option Text Call Bridge Number (if applicable)
#1 Available
x
#2 Not Available
Need more options? Go to full message
Cancel Send

CHAPTER 11: DOCUMENT LIBRARY ACCESS

A. View Contents of Folders

Audience: Unit Administrators and volunteers

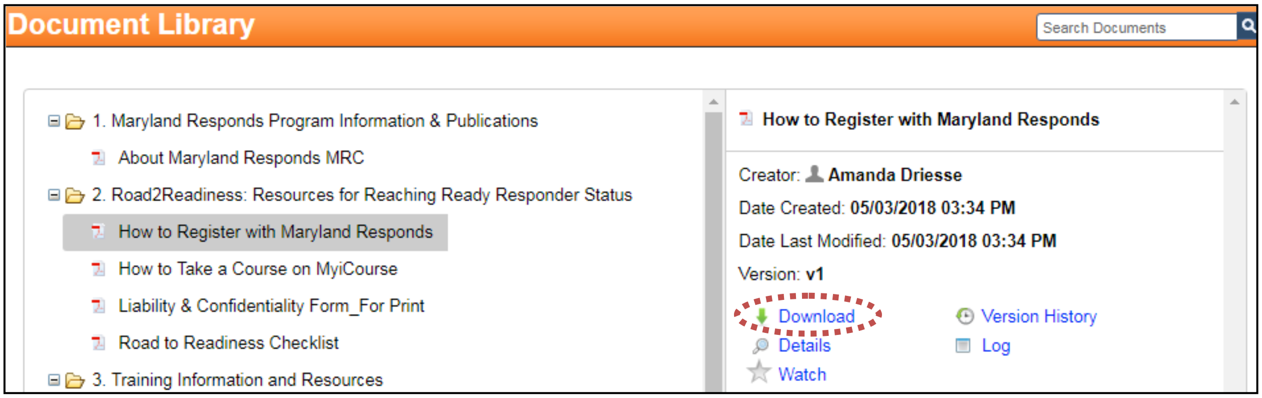
1. Go to the **Documents** tab and choose the **Document Library** sub-tab
2. Click the **plus icon** to the left of the desired folder's name to expand



B. Download a File

Audience: Unit Administrators or volunteers

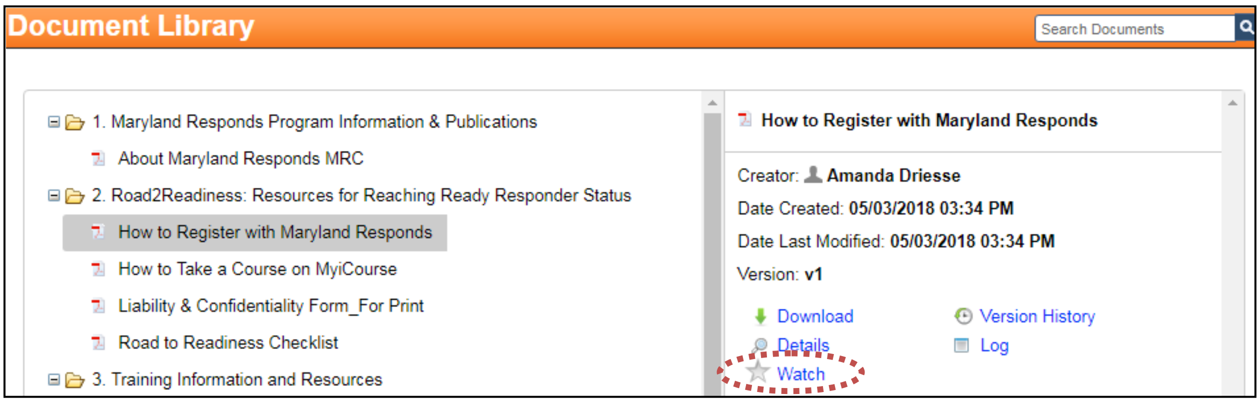
1. Go to the **Documents** tab and choose the **Document Library** sub-tab
2. Navigate to where the desired file is stored and click on the file name
3. Further details about the document will populate in a review panel on the right side of the screen
4. Click the **Download** link in the review panel and follow browser prompts to open or save the file



C. "Watch" a File or Folder

Audience: Unit Administrators or volunteers

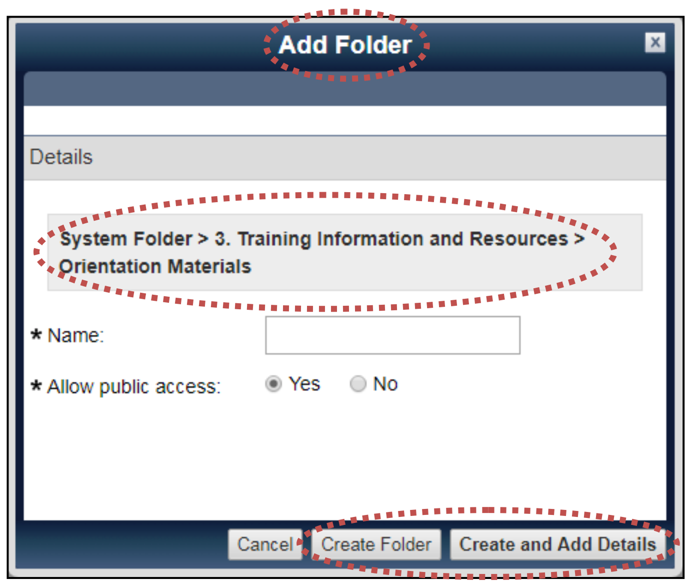
1. Go to the **Documents** tab and choose the **Document Library** sub-tab
2. Click the file or folder
3. Click the **Watch** link in the right preview panel
4. To view watched documents, click the **My Watched Document** sub-tab



D. Create a Folder

Audience: Unit Administrators – can create folders in parts of the document library where they can see the "Create Folder" option.

1. Go to the **Documents** tab and choose the **Document Library** sub-tab
2. Next to the desired parent folder, click **Create Folder**, to open the **Add Folder** pop up
   - Ensure the gray box on the pop up displays the desired hierarchy for the new folder
3. Specify a folder name, and determine whether you want all users to be able to access the folder.
4. As the last step, choose either of the following options:
   - Click **Create Folder** to add the folder to the **Document Library**
   - Click **Create and Add Details** to add folder details



E. Edit Folder Details

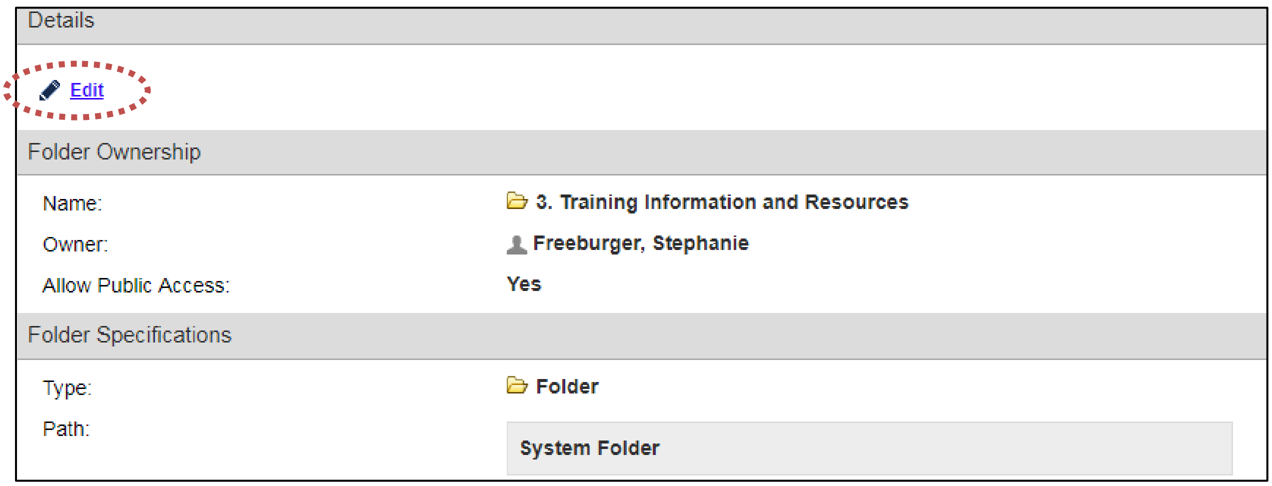
Audience: Unit Administrators – can edit folder details of the folders they have created.

1. In the **Document Library**, click on folder to open the right review panel and click the **Details** link

2. In the upper left corner, click the **Edit** link

3. Edit the folder details. Pay special attention to these fields:
   - **Owner**: Person who created the folder
   - **Allow public access**: Click **Yes** if you want all users to be able to view the folder
   - **Type**: Specifies if the item is a folder or a file
   - **Path**: Displays where the folder is located

4. Click **Save Changes**



F. Add a File

Audience: Unit Administrators - can create folders where there is an "Add File" option.

1. In the **Document Library** tab, click the **Add File** link to the right of the folder name

2. In the **Add File** pop up, use **Choose Files** to select the desired document(s) to add

3. Specify an **Alias** for the file
   - The alias is used in document searches and is displayed as the filename

4. Then perform one of the following actions:
   - Click **Create File** to add the file to the **Document Library**
   - Click **Create and Add Details** to open the **Details** page and add file details

G. Edit File Details

Audience: Unit Administrators - can edit file details of the folders they have created.

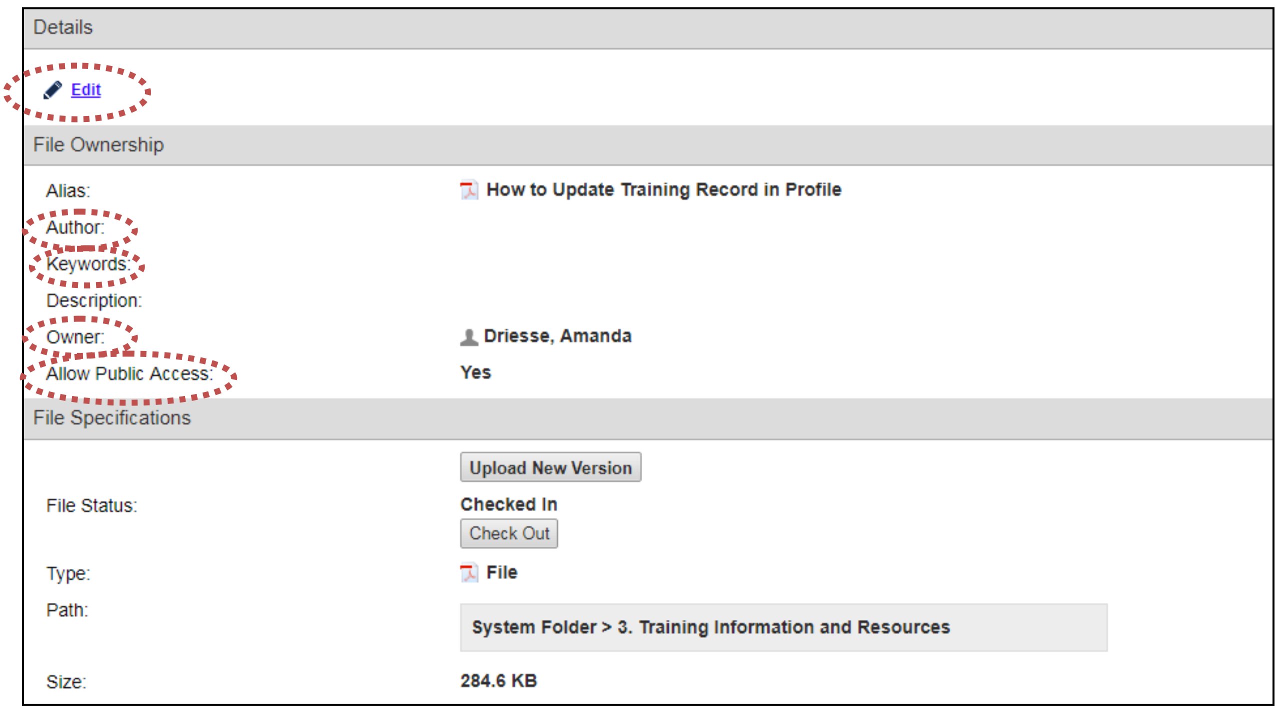
1. In the **Document Library**, locate the desired file in the hierarchy and select its name

2. Click the **Detail** link in the right review panel

3. Click the **Edit** link in the upper left corner

4. Edit file details. Pay special attention to these fields: (for full details, see the **Help Center**)
   - **Author**: Specify who created the file.
   - **Keywords**: Set keywords for the file. Keywords are used in document searches.
   - **Owner**: Person who uploaded the file - cannot be edited.
   - **Allow public access**: Select **Yes** if you want all users to be able to view the file.

5. Click **Save**



CHAPTER 12: REGISTRY DATA EXPORTS

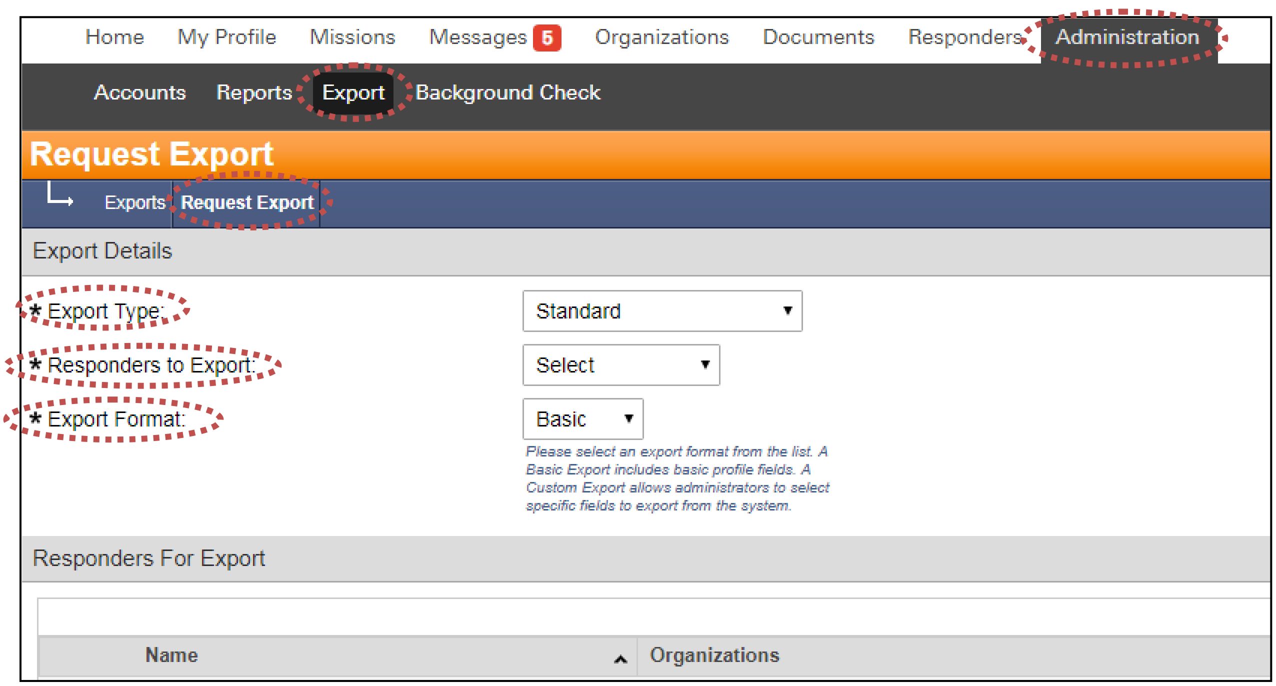
Audience: Unit Administrators

1. Go to the **Administration** tab and select the **Export** sub-tab

2. Click the **Request Export** button

3. Specify export options
   - **Export Type:** Specify the type of export to perform
   - **Responders to Export:** Specify volunteers whose information to export
     a. **Occupations:** Export volunteers by the selected occupations – it is available only if you select **By Occupation** in the **Responders to Export** field
     b. **Search by Organizations:** Click the **Add Organizations** button to select organizations whose members you want to export – it is available only if you select **By Organization** in the **Responders to Export** field
     c. **Group:** Select groups whose members you want to export. This option is available only if you select **By Group** in the **Responders to Export** field.
     d. **Add Users by Search:** Find and add users you want to export. This option is available only if you select **By Search** in the **Responders to Export** field.
   - **Export Format:** Specify the export format. Select between **Basic** and **Custom**. If **Custom** is selected a list of **Export Fields** to select from will pop up.
     a. **Export Fields:** Select the fields you want to export. Use the **Left** and **Right** arrows to move the desired fields to the box on the right. Use the **Up** and **Down** arrows to arrange the fields in the desired order.

4. Click **Export –** your export can have a status of **processing**, **complete**, or **failed**:
   - **Processing**: After you request an export, the status is set to **Processing** – the processing time may vary based on the size of the export
   - **Complete**: When the export is ready for you to download, its status is set to **Complete**
   - **Failed**: If an error occurs during the export, its status is set to **Failed**



CHAPTER 13: FREQUENTLY ASKED QUESTIONS

Q: Is there a limit to the number of times I can attempt my password?

A: If you receive an error message after attempting to log in with an incorrect username and password three times, you will be locked out of your account. Contact mdresponds.health@maryland.gov to reset your password. If you lock yourself out of your account, you will be unable to log back in for ten minutes.

Q: Does my password expire?

A: The Registry requires that Unit Administrators change their password every 60 days. You will not be locked out of the Registry if your password has expired. A volunteer's password will not expire.

Q: Is there an automatic log out?

A: After 30 minutes of inactivity, you will be logged out of your account.

Q: Is my information safe in the Registry?

A: Every possible step relating to data integrity and security is taken by the staff in order to prevent abuse and to protect our volunteers' privacy. Further, all communications between your browser and this site are encrypted. Please review the Privacy Policy and contact the State Program if you would like further information.

Q: Can Unit Administrators edit volunteer profiles?

A: Yes. Unit Administrators have the ability to access, view, update, change, etc., information for any volunteer in your organization. See Chapter 4 for additional information.

Q: Can Unit Administrators reset usernames?

A: Yes. Before changing the username of the volunteer, ask the volunteer what they want to change the username to. See Chapter 5 for more information. Contact the volunteer to confirm that you've completed the task.

Q: Can Unit Administrators reset passwords?

A: Yes. See Chapter 5 for more information.

Q: Who gives volunteers their ID badges?

A: MDRMRC State Administrators issue ID badges to volunteers.

Q: How are volunteer professional licenses verified?

A: The Registry is integrated with many professional boards to provide automatic verifications of many types of professional licenses. For other license types, State Administrators manually check board websites to verify an individual license and change the volunteer's license status in the Registry. See the Volunteer Management Guide for additional information.

Q: When a new person requests membership, will we get a notice?

A: Yes. The Registry sends automated messages on Monday summarizing new registrations. However, we strongly recommend that Unit Administrators log-in more frequently to approve requests.

Q: Is it possible to be a member of more than one local MDRMRC Unit?

A: No, volunteers cannot be a member of more than one local Unit. This is due to liability.

Q: What if a volunteer of one Unit wants to help during an event for a different Unit?

A: All local MDRMRC Units are an extension of the MDRMRC State Program; all volunteers will receive call outs from their Unit Administrator as well as State Administrators during times of State emergencies or when local resources are exceeded. Thus, a volunteer of one Unit can help out with an event in a different county if they receive a State call-out. For example, a Baltimore County Unit volunteer may want to help out with a Harford County incident; the Baltimore County Unit volunteer may only help out with the Harford County incident if a State-wide call-out is issued.

Q: Could you explain the "Out-of-State" organization?

A: The MDRMRC "Out-of-State" Unit is comprised of volunteers who do not hold a Maryland residence. These volunteers may be activated by the State Program in the event of a State-wide emergency.

Q: How often are Unit Administrator conference calls?

A: Conference calls for Unit Administrators are hosted by the State Program once per quarter (four times per year).

Q: Can we have more than one Unit Administrator?

A: Yes, you can have any number of Unit Administrators. The only requirement is for each of the Unit Administrators to complete the new Unit Administrator Registry access steps outlined in the Volunteer Management Guide. Among your Unit Administrators, you should identify one primary Unit Administrator; this primary Unit Administrator's email address will be what volunteers email through the Registry.

Q: What will the MDRMRC State Program do to help with volunteer appreciation?

A: The State Program publishes quarterly newsletters and would be happy to include a 'thank you' piece from Unit Administrators to their volunteers. Please contact the State Program to propose or submit a newsletter piece.

Q: What are all the credential verifications?

A: Credentialing is the process of collecting information for evaluating and documenting the qualifications of licensed professionals including information about a person's current license or degree; training or experience; and competence or certification. Below is a description of each credential verification method used by the Registry.

State Licensing Boards:

Automatic license verification is built into the Registry for some health care occupations regulated by State Licensing Boards. Credential verification for the health care license that is not automatically verified by the Registry is conducted manually by the MDRMRC State Administrators when issuing ID badges. For a listing of Maryland State Licensing Boards and the method used for verifying licensure with each, see "License Verifications Configurations Table".

American Board of Medical Specialties (ABMS) Certification Service:

Medical specialties are verified automatically through the American Board of Medical Specialties (ABMS). The ABMS data is used to verify various specialty certifications held by physicians in the system. A verified ABMS certification is required for assignment of physicians to Emergency Credential Level (ECL) 1 and 2 which are defined in the next section of this chapter.

American Osteopathic Association (AOA) Medical Specialties Certification Service:

The AOA data is used to verify various specialty certifications of osteopathic physicians in the system. A verified AOA certification is required for assignment of physicians to ECL 2 and ECL 1.

American Society for Clinical Pathology (ASCP) Service:

ASCP data is used to verify specialty certifications that relate to pathological or and laboratory work. A list of occupations that this data impacts is included below.

Cardiac Rescue Technician (CRT-I)
Cardiovascular Technologist / Technician
Clinical Laboratory Scientist
Clinical Laboratory Scientist Trainee
Dental Laboratory Technician
Hemodialysis Technician
Laboratorian
Laboratory Technologist
Laboratory, Other

Medical and Clinical Lab Technician
Medical and Clinical Lab Technologist
Ophthalmic Laboratory Technician
Orthopedic Technician
Pharmacy Technician
Physician
Public Health Laboratory Technician (MLT, CLT)
Public Health Laboratory Technologist (MLS, MT, CLS)

U.S. Drug Enforcement Administration (DEA) Pharmaceutical License Database:
Medical professionals who dispense or prescribe controlled drugs must hold a DEA licenses. The DEA Pharmaceutical License Database is a federal database that is used to verify that a medical professional's pharmaceutical license is valid. A verified DEA license is required to reach ECL 2 and ECL 1 for APRN's, dentists, physicians, physician assistants, psychologists and veterinarians.

Federation Credentials Verification Service (FCVS):
FCVS is a national database that establishes a permanent, lifetime repository of primary-source verified core credentials for physicians and physician assistants. FCVS data provides information on any adverse actions taken against physicians and physician assistants in the system.

Office of Inspector General (OIG) List of Excluded Individuals and Entities (LEIE):
The OIG has the authority to exclude individuals and entities from federally funded healthcare programs due to a civil or criminal conviction in the federal or state court, or due to any adverse federal or state licensing actions. The OIG maintains a list of all currently excluded individuals and entities called the List of Excluded Individuals and Entities (LEIE). The OIG LEIE data is used to verify that a Volunteer is not listed as excluded from participation in federally subsidized medical programs and response events. Volunteers who appear in the 'excluded individuals' database cannot be assigned an ECL level, which is an indication that a more in-depth background check be conducted.