Special Needs Registry Survey Application

ROCKLAND COUNTY
NEW YORK

User's Guide

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Overview

During a natural or man-made disaster, particularly one that requires the evacuation of densely populated coastal communities, emergency responders must be able to quickly identify the location, accessibility issues, and mobility requirements of people with special needs. These individuals are typically characterized by impairments and disabilities. While the special needs population shares a common need for particular attention during emergencies, it is not a homogenous group. The first line of defense against the effects of a disaster is personal preparedness. During an emergency, the government and other agencies may not be able to meet the needs of individuals with special needs.

Rockland County sought to increase its knowledge of the number and needs of people with special needs and strengthen/create plans to assist them before, during, and after an emergency. In order to identify individuals with special needs in Rockland County, the Special Needs Registry Survey Application (Registry) Web site was implemented for the county and all its municipalities. The Registry allows residents with special needs and their families, friends, and associates an opportunity to provide information to emergency response agencies, so responders can plan to serve them in a disaster or emergency situation. Local officials will also be able to notify registered individuals when an evacuation has been ordered.

Along with helping to identify the special needs population, the County has a desire to inventory existing facilities and provide special needs shelter recommendations. A special needs facility is a physical structure within which individuals reside (either permanently or temporarily) who may be at an increased risk during a disaster when orders to evacuate or shelter-in-place are given. The information provided will be used, in conjunction with information gathered at the time of the incident, to enable decision makers to allocate resources and provide support during times of disaster. With the assistance of local resources and their knowledge, existing facilities and possible special needs shelters along with all associated resources were entered into the Registry, giving the County the ability to rapidly identify and deploy resources during an emergency.

The Registry provides analytical and planning tools (e.g., what if scenarios, plume analysis, geographic analysis). It is a proven product that allows the County to collect and compile survey information in an electronic format that is easily searched and spatially displayed. It also provides several reporting mechanisms so emergency response personnel can quickly generate manifests to use as a reference to inform and notify individuals of a possible impending incident. The information collected is confidential and will not be available to the public. Security measures are taken by the county department to protect the data. In addition, policies and procedures have been applied so that the information is only used for emergency planning and response purposes.

Overview (Continued)

The Registry incorporates the use of icons to help simplify the functionality of the survey completion. The icons and their corresponding functions used in this system are detailed below:

✔	Accepts the option or search criterion. Saves the current operation.
🚫	Cancels the current operation.
✏	Edits the information on the respective line.
🗑	Deletes the information on the respective line.
⊞	Expand/Show – allows users to view a "hidden" section.
⊟	Collapse/Hide – allows users to save space on the screen and to "hide" a visible section.
🔍	Allows users to view details about a user.
ⓘ	Provides contact information for county personnel.

In summary, the Registry helps state and local governments identify and assist individuals with special needs during an evacuation event. It is an efficient way to catalog individuals and their needs, map the evacuation area, and deploy the necessary resources. It provides the user with the ability to dynamically report which individuals need assistance based on the geographic nature of the incident. The system allows citizens to register themselves or other individuals on their behalf online. The system not only helps emergency managers respond during an emergency but is a critical tool for pre-planning and exercises.

Registration and Public Login

Users can access the survey application from any computer that has an Internet connection. This application has been designed to be used with MicroSoft Internet Explorer 6.0 or higher. Using other browsers such as Netscape navigator or Mozilla Firefox may yield unpredictable results.

Note: *Pop-up blockers will cause the system to function improperly. Please set your browser to allow pop- ups for this application. Also, using the "Back" button on your Web browser will produce unpredictable results. Please use the appropriate navigation buttons designed within the application.*

The Registry's registration and public login section serves several purposes:

- It provides a brief overview of the Registry program and how it benefits the individuals who use the registry tool.

- New user registration – it is the gateway for new users to register.

- Existing users – it provides a public interface or login for registered or existing users to sign in to the system.

- Administration – it allows administrators to gain access through the same portal to manage surveys and user accounts.

- Login credentials – if existing users forget their credentials, they may submit a request to have a username and/or password re-created. The system automatically sends the individual an email with the new login information.

Figure 1: Registration and Public Login Home Page

Registration and Public Login (Continued)

New User Registration

The New User Registration section provides the ability for self-service registration for new users of the system. In the case of a new user, or one who does not have an account, registration is required prior to completing a survey. A new user may be the person with a special need or a third-party person acting on his/her behalf.
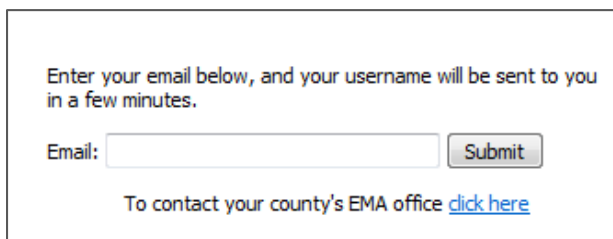
Public Login for Existing Users

An existing user is one who has already registered through the new registration process and has an account in the survey system. This user is now ready to complete a survey for themselves or on behalf of someone else.

Forgot Username

If a user has forgotten his/her username, a link is provided that will allow the user to request their username via their email. If an email was not provided during the registration process, the user may contact their local EMA office for assistance.

Figure 2: Description of Standard Username
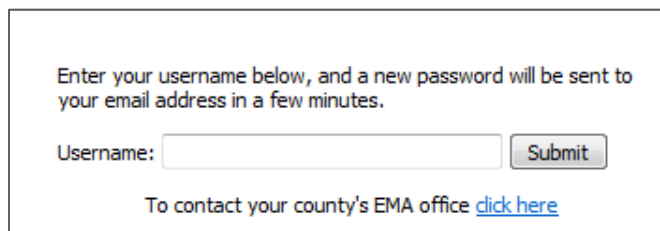
Forgot Password

If a user has forgotten his/her password, the system has the ability to email a new password. Once the user has entered and submitted the assigned username in the space provided on the New Password Request screen, the password will be automatically generated and sent to the email address the user provided during the account registration process.

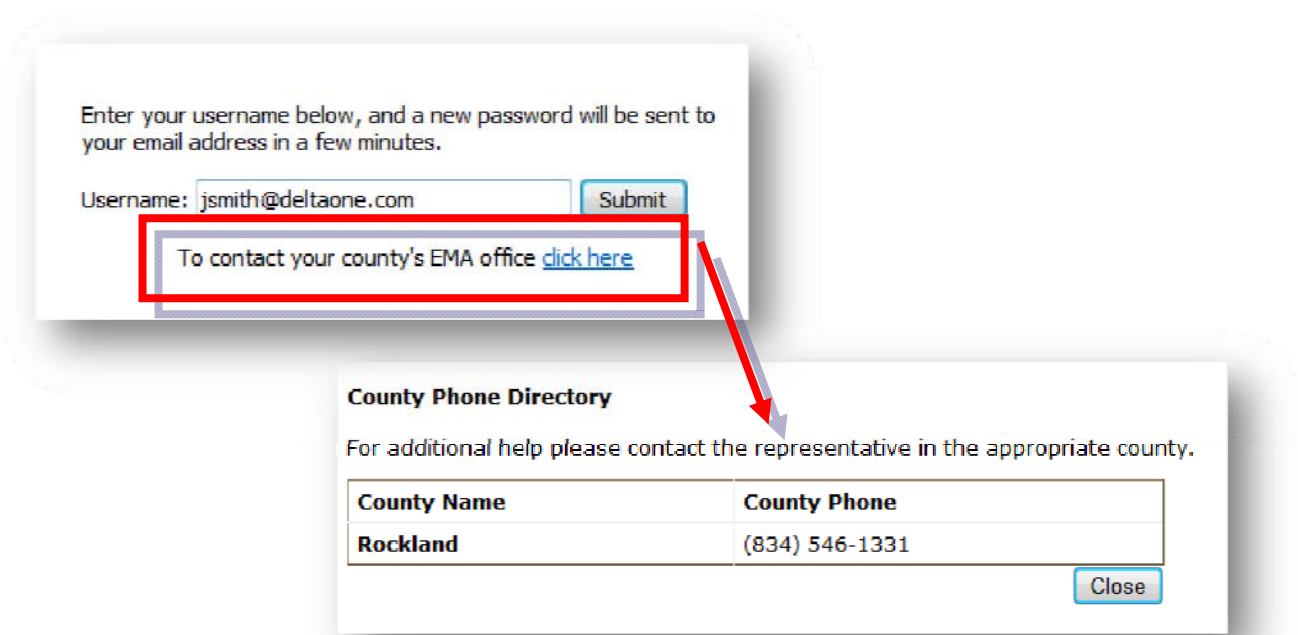**Figure 3: New Password Request**

Registration and Public Login (Continued)

County EMA Contacts

In the event a problem arises when the user tries to reset their username and/or password, a link has been provided from the Forgot Username and Forgot Password sections that contains the county contact information for assistance.

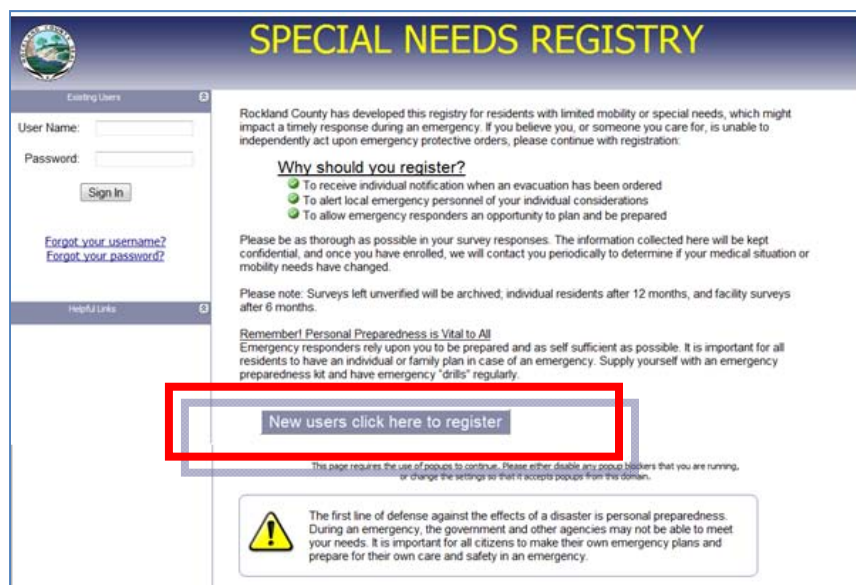**Figure 4: List of County Contacts**

Registration and Public Login (Continued)

Create an Account

Exercise 1:

This exercise will walk you through the process of creating an account in the Registry.

Figure 5: Registration and Public Login Section

1.   For new users who do not have an account, click **New Users Click Here to Register** on the Registry's registration and public login section.

2.   New users will be presented with the New User Registration section. Required fields are identified with a red asterisk (***=Required Field**). Complete all the required fields for this section of the survey.

Figure 6: New User Registration Section

Registration and Public Login (Continued)

Exercise 1 (Continued):

3. Enter a valid email address in the space provided. Account update notifications will be sent to this email address and will be the email address that receives an auto-generated response if the user resets their username and/or password.

4. When the primary phone is a device for the deaf, click on the checkbox option to indicate that the primary phone is teletypewriter device (TTY/TTD.) Phone number fields will be validated to make sure the data entered is in the correct format.

5. If no phone number is available, click on the checkbox option to indicate that the individual does not have a phone. If a second phone number is available, enter it in the space provided.

6. The username must be created to gain access to the system and complete the survey. The username must be at least six characters and can be a combination of letters, numbers and characters.

7. Passwords are required and must be at least six characters (a combination of letters, numbers, and characters.) Enter a password and retype the password to confirm.

8. Click **Continue >>** to advance to the Account Information section.

At this point, users may choose to save their information and exit the registry. The survey may be completed at a later date and time by simply logging back into the system.

Completing Public Surveys

The Registry is designed to allow individuals, emergency management personnel, special needs advocates, and stakeholder groups that provide services to special needs populations to complete a survey quickly and easily. Individuals with a special need who have registered themselves, or someone who is acting on their behalf, can fill out a survey through a public-facing site. The survey is developed in a wizard-style format and walks the respondent through the sections step-by-step.

Along with helping to identify the special needs population, the Registry has the capacity to inventory existing shelters and special needs facilities. A special needs facility is a physical structure within which individuals reside (either permanently or temporarily) who may be at an increased risk during a disaster when orders to evacuate or shelter-in-place are given. The information provided will be used, in conjunction with information gathered at the time of the incident, to enable decision makers to allocate resources and provide support during times of disaster. The existing shelters and special needs facilities along with all associated resources are entered into the Registry, giving the County the ability to rapidly identify and deploy resources during an emergency.

Account Information

The survey begins with the Account Information section. This section functions as a place for registered individuals to

- complete a new survey by simply choosing **Myself** or **Someone Else**,
- view/edit/delete existing survey information,
- update their personal account information,
- display the list of surveys created and the date they were last updated, and
- exit or log out of the system

An individual may choose to complete the survey at another date and time. Once registered, an individual logs back into the system by entering the appropriate username and password that was created during the registration process.

As demonstrated in the previous exercise, the individual registered an account. Now that individual may begin completing a survey or make additional changes or updates to the account information.

Figure 7: Updates to Personal Account

Update Account

Registered individuals can update or make changes as frequently as needed to their personal account information by logging into the Registry from the registration and public login section. They can log in as an existing user and click **Update Account** in the Account Information section.
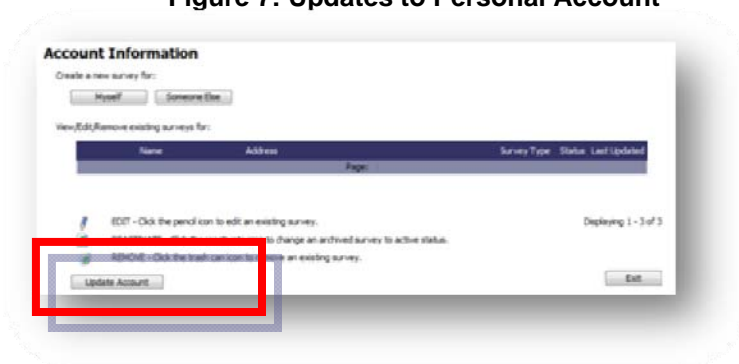
Account Information (Continued)

Exercise 2:

This exercise will require you to log in with your account credentials and proceed to complete a survey. You may complete a survey for yourself or for someone else.

1. Use the Registry's registration and public login section to log in to the system with the account credentials created earlier in the Create an Account - Exercise 1. Registered or existing users log in to the Registry by entering a username and password in the spaces provided, as shown in Figure 8.

2. Click **Sign In**. Once you have successfully signed into the Registry, you will begin to complete the Account Information section.

3. **Account Information Section** – Click on the option to create a new survey for **Myself**. Personal information about you is gathered from the New User Registration section and populated in Section 1A – Your Personal Information.
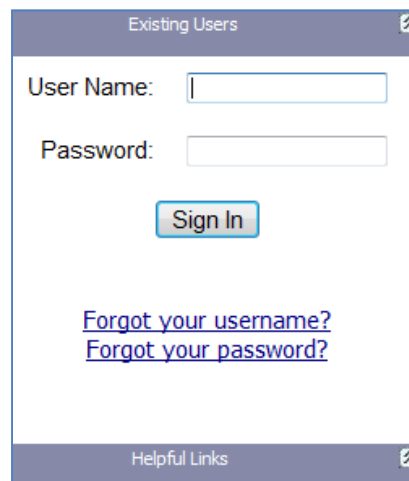
Figure 9: Account Information - Myself
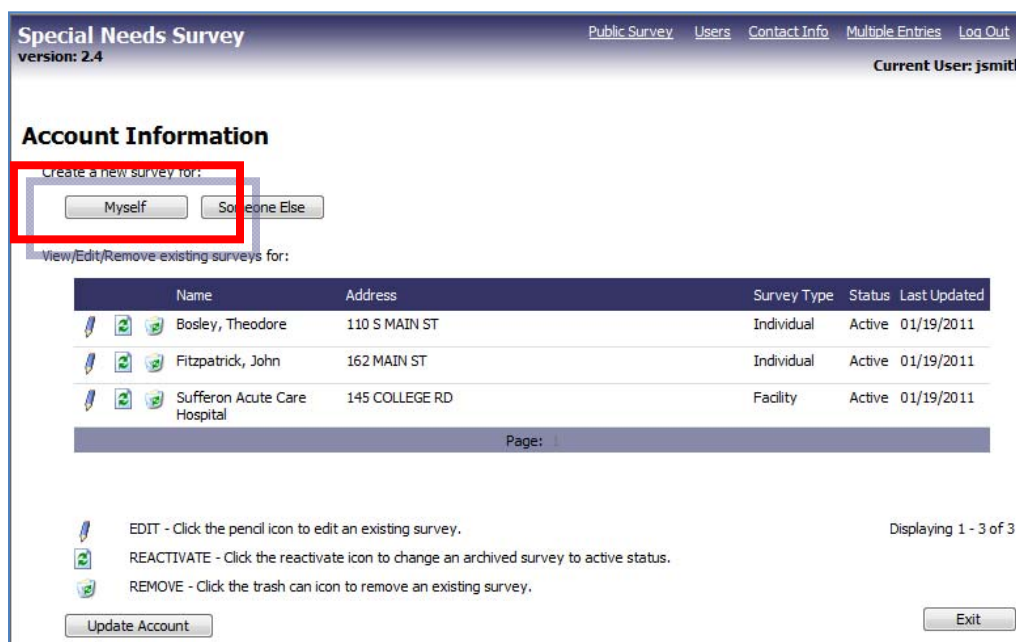
Individual Surveys

An individual survey consists of several specific sections that collect important information about an individual with special needs. Each section of the survey requires a response from the individual. Section 5 – Additional Comments/Information is optional. Below is a list of each section in the survey and a brief explanation of the reason why this information is collected.

- Section 1A – Your Personal Information – Personal information about an individual, such as name, address, telephone number, date of birth, height, weight, and gender, is collected in this section to assist first responders to determine the location of the individual and help them to allocate the necessary resources in the event of an evacuation or in response to other emergencies. The county and municipality information is gathered for logistical and geospatial purposes. Once an address has been entered, and the county and municipality have been selected, the Registry's geo-coding utility matches the co-ordinates and generates a point of reference on the map in the Registry.

  Note: *The geo-coding functionality is described in greater detail in the Survey and User Management section of this Guide.*

- Section 1B – Emergency Contact Information – An individual who would like to provide information for an emergency contact to be notified in the event of an emergency can do so in this section. An emergency contact may be a relative, friend, neighbor, caregiver, etc. First responders may need to contact this person to discuss the individual's situation and other relevant information. The individual may also choose not to provide any reference for an emergency contact.

- Section 2 – Evacuation Information – This section of the survey collects information about an individual's condition(s). If there were an emergency requiring evacuation, the individual can provide important details about cognizant, mobility, or communications issues that first responders should be aware of in order to better prepare for evacuation.

- Section 3 – Duration of Need – An individual's condition may or may not be permanent. By providing information about their condition in this section, such as an estimated date of recovery, the Registry can automatically manage those surveys that are temporary.

- Section 4 – Level of Assistance – Each individual's condition is unique and may require different levels of assistance; therefore, this section asks questions to determine the exact level of help to be provided.

  Individuals may own pets or service animals that would require special arrangements for their care. Medications need to be accounted for in the case of an evacuation situation. Does the individual have a caregiver, and if so, do they provide 24-hour caregiver service, are they present at the address provided, and is the caregiver available to support this person in the event of an emergency? In addition, an individual may be a seasonal resident. In this case, the person would indicate the dates when he/she is residing at this location.

- Section 5 – Additional Comments/Information – There may be information that an individual may feel is important to provide as part of the evacuation plan but has not been included during the course of the survey. They may enter detailed information about their condition or situation in this section.

Complete an Individual Survey

Exercise 3:

In this exercise, you will complete an entire survey for yourself. Verify that you are logged in the system from the Registry's Registration and Public Login section with the account credentials created in Create an Account - Exercise 1.

Section 1A – Your Personal Information

1. The registration information that was entered in the New User Registration section for the user account will automatically populate the fields found on Section 1A – Your Personal Information, as shown in Figure 10 below. Review the information and make changes where needed. Complete all the required fields. Required fields are denoted with a red asterisk.

Figure 10: Section 1A - Your Personal Information

2. Select a county from the drop-down list.

3. Select a municipality from the drop-down list.

Complete an Individual Survey (Continued)

Exercise 3 (Continued):

Section 1A – Your Personal Information (Continued)

Section 1A includes two links that explain why the individual is asked to provide information about their municipality and their height and weight (see below.)

4. Click on the link <u>What is this?</u> This help link describes how your municipality is different from your city. Close the dialog box by clicking ❌.

Figure 12: Municipality Help Link

How is my Municipality different from my City?

The entry in the "City" field should be the same as your mailing address. For example: if you live in the Village of Upper Nyack, and your zip code is 10960 (Nyack zip code), your "City" would be Nyack.

5. Click on the link <u>Why do we need this?</u> This help link describes why it is important for you to provide as much information as possible about your special needs. Close the dialog box by clicking ❌.

Figure 13: Personal Information Help Link

It is important that our personnel be aware of any condition that requires either special equipment or additional personnel to evacuate the person in need. This includes gathering information on an individual's size (both height and weight).

Complete an Individual Survey (Continued)

Exercise 3 (Continued):

Section 1A – Your Personal Information (Continued)

6. If multiple addresses are found that match or are similar to the address you entered, a Multiple Addresses Found dialog box will appear. Choose the address that is the closest match to your address. If none of the addresses match, click **None of the Addresses Matched**. The address is saved and the survey continues to the next page.

Figure 11: Multiple Address List

Multiple Addresses Found
Please choose the address that is the closest match

Address on Survey:
1 Main Street, 10956

Matching Addresses
1 S MAIN ST, Clarkstown 10956
1 MAIN ST, Orangetown 10960
1 N MAIN ST, Orangetown 10965
1 S MAIN ST, Orangetown 10965
1 MAIN DR, Clarkstown 10954
1 MEIN DR, Clarkstown 10956
1 S MAIN ST, Clarkstown 10956
1 N MAIN ST, Clarkstown 10956
1 S MAIN ST, Clarkstown 10956
1 S MAIN ST, Clarkstown 10956
NONE OF THE ADDRESSES MATCHED
<< Prev   Next >>

7. To navigate through the sections of the survey, click **Exit, <<Back,** or **Next Survey Page>>** at the bottom of the page.

Note: *If you are still reviewing the Section 1A – Your Personal Information page, clicking* **<<Back** *will also prompt you to exit the survey. Any changes to the survey will be lost.*

Complete an Individual Survey (Continued)

Exercise 3 (Continued):

Section 1B – Emergency Contact Information

This section is where a person may provide emergency contact information in the event of an emergency. Complete all the fields that are marked with a red asterisk. All other information in this section is optional.

1. Select one of the choices from the drop-down list that describes the emergency contact's relationship to you.

2. If you choose not to provide emergency contact information, please check the option that states "I choose not to provide emergency contact information."

Figure 14: Section 1B – Emergency Contact Information

3. Click **Next Survey Page>>** to continue to the next section of the survey.

Complete an Individual Survey (Continued)

Exercise 3 (Continued):
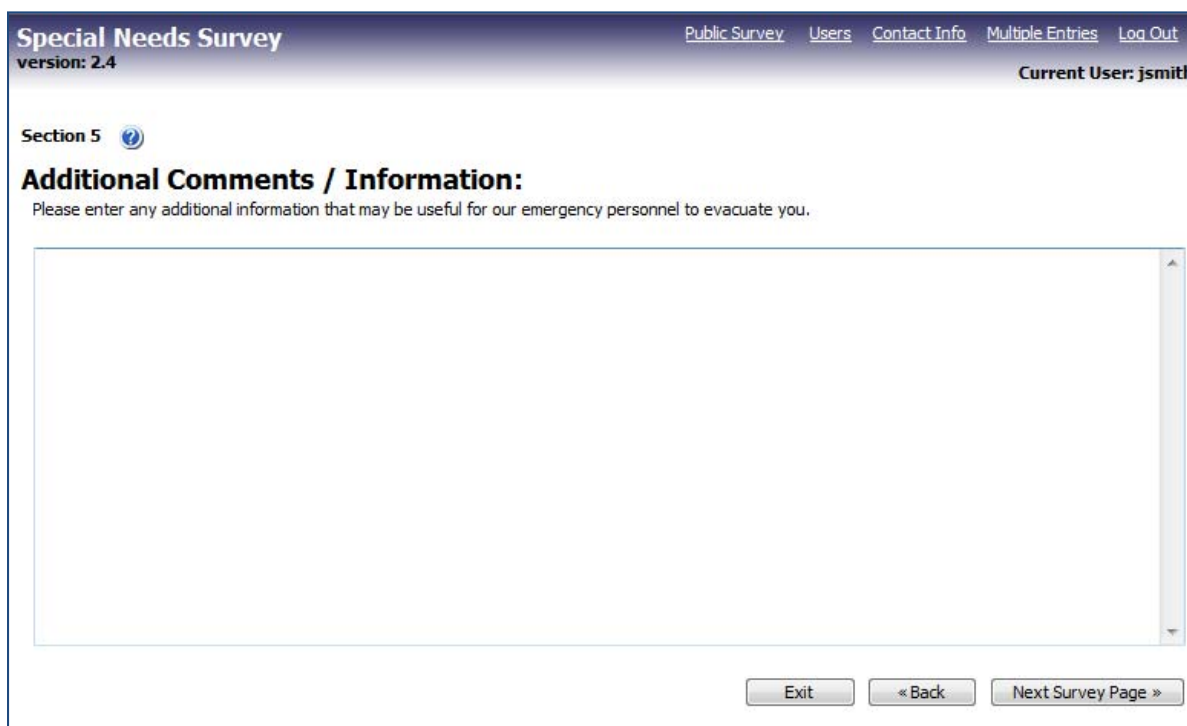
Section 2 – Evacuation Information

This section collects information about the condition(s) of an individual. If there were an emergency requiring evacuation, the individual may have difficulty evacuating or being notified of the need for evacuation because of his/her condition(s).

1. **Check** all the options that apply to your condition by clicking on the appropriate boxes.

2. **Select** "Other" if none of the options apply. Please enter the specific reason in the space provided.

Figure 15: Section 2 – Evacuation Information

3. **Click Next Survey Page>>** to continue to the next section of the survey.

4. If English is not your primary language, **check** option #14 and select a language from the drop down menu.

Complete an Individual Survey (Continued)

Exercise 3 (Continued):

Section 3 – Duration of Need

This section is where you will provide information about the length of time the condition is expected to last. If the conditions that you previously selected in Section 2 – Evacuation Information are temporary, select "Yes."

1. **Provide** an estimated date when your condition will be resolved. **Select** the month from the drop-down menu. Enter the year.

2. If your condition(s) is expected to be permanent, select the option that states "No, the conditions(s) are expected to be permanent."

Figure 16: Section 3 – Duration of Need

3. Click **Next Survey Page>>** to continue to the next section of the survey.

Complete an Individual Survey (Continued)

Exercise 3 (Continued):

Section 4 – Level of Assistance

1. **Select** Yes or No for questions #1 through #3. These are required questions.

2. **Select** Yes or No for question #4.

3. **Select** Yes or No for question #5. If the answer is No, choose a time (from and to) the person will need evacuation assistance from the drop down menu.

4. **Select** Yes or No for question #6. If the answer is No, choose the months (from and to) if the individual is a seasonal resident from the drop down menu.

Figure 17: Section 4 – Level of Assistance

5. Click **Next Survey Page>>** to continue to the next section of the survey.

Complete an Individual Survey (Continued)

Exercise 3 (Continued):

Section 5 – Additional Comments/Information

The Additional Comments/Information section gives the person completing the survey an option to provide additional comments and suggestions, and capture information that was not covered in previous sections, and may be useful to emergency personnel for evacuation in the event of an emergency.

1. To enter comments, click in the space provided and type as much information as possible to describe your condition, situation, or any other factor that may assist emergency personnel to efficiently and safely evacuate you from the premises.

Figure 18: Section 5 – Additional Comments/Information

2. Click **Next Survey Page>>** to continue to the final section of the survey.

Complete an Individual Survey (Continued)

Exercise 3 (Continued):

Thank You Statement

The final section of the survey is the Thank You Statement. Rockland County appreciates the time and effort the person has taken to complete the Special Needs Survey and extends its gratitude to the individual for his/her help. The information provided will ensure the safety of the special needs population throughout the community.

1. **Click Save** to save the information. The system will place you back on the Account Information page.

2. Or **click <<Back** to return to the previous page of the survey.

3. **Click Exit** to quit the survey. All the information collected throughout the survey will be saved. This action will redirect you to the Account Information Section.

Figure 19: Thank You Statement
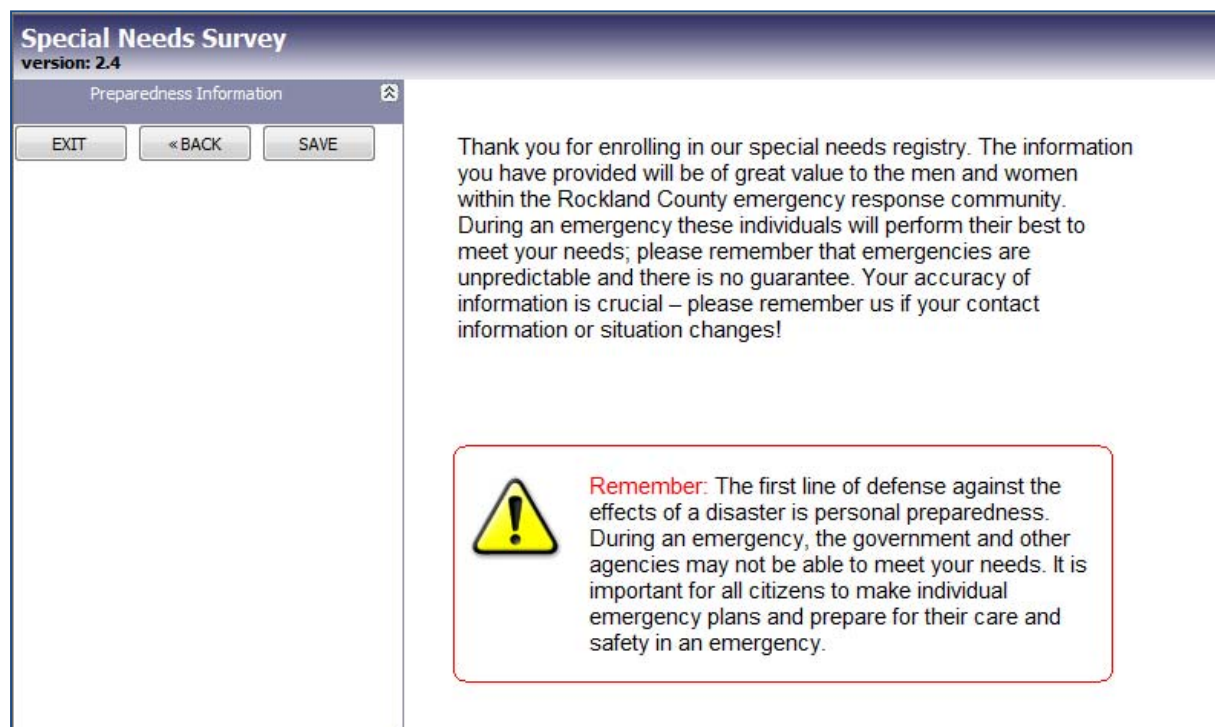
Edit an Individual Survey

Now that a survey has been completed and saved, respondents may edit their personal information at any time by logging back into the Registry from the Registration and Public Login section.

Exercise 4:

This exercise will demonstrate how an existing user can quickly access and update their personal information in the survey.

1. Click to edit your personal information or someone else's survey.

2. Click **Next Survey Page>>** on each section to edit the survey.

3. Click **Finish** when you have finished editing the survey.

Figure 20: Edit a Survey

Delete an Individual Survey

An individual or an existing user may have entered a survey for themselves or someone else, but their condition is temporary. At any point in time, the individual may delete their survey information from the Registry.

Exercise 5:

This exercise will demonstrate the steps to delete a survey from the Registry.

*Note: Once a survey has been completed by the individual who registered, the **Myself** option will no longer be available unless the individual deletes their existing survey. Once deleted, the **Myself** option will be active and the individual may re-enter a new survey.*

1. **Click** 🗑 to delete an individual's survey.

Figure 21: Remove a Survey

2. **Click OK** to accept the deletion of the survey.

Figure 22: Deletion Confirmation
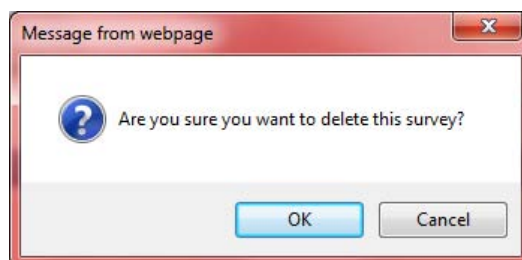
Create a New Survey for Someone Else

Some individuals will not be in a position to complete their own survey and will need a person acting on their behalf to complete one for them. In such a situation, a third party or someone acting on the behalf of another individual can complete a survey by registering the individual and choosing the option to complete a survey for **Someone Else**.

Exercise 6:

This exercise will demonstrate how to complete a survey for another individual who cannot complete one for themselves. The person who is acting on behalf of the individual with the special need will need to create an account in the Registry.

1. **Click Someone Else** to begin a new survey for an individual other than yourself.

Figure 23: Account Information – Someone Else

Create a New Survey for Someone Else (Continued)

Exercise 6 (Continued):

2. **Complete** the information in Section 1A – Personal Information for Individual with Need.

Figure 24: Section 1A – Personal Information for Individual with Need

3. **Refer** to the section on Complete an Individual Survey and follow the steps in Exercise 3 to complete the remaining sections of the survey.

Administrative Module

The Administrative Module is a powerful tool for administrators. It allows system administrators to manage the application, utilize detailed searching and reporting capabilities, and rapidly enter or update survey information. The main screen is referred to as the dashboard and is divided into four sections: administration functionality, list and search capability, reporting and data entry tools, and the survey records which lists individual and facility surveys. Each feature of the administrative component and the functionality that are supported by the components are described in greater detail on the following pages of this User's Guide.

Figure 25: Administrative Module (Dashboard)

Listing and Search

The Listing And Search format of the dashboard displays a list of surveys in the system as shown in the figure below. At a glance, an administrator can see some standard information about the surveys in the system. The surveys that appear on the dashboard are divided into groups by page. More surveys can be seen by using the page links at the bottom of the list. In addition, tools to edit, archive, and delete surveys have been incorporated into the format.

Figure 26: Example Listing and Search

Administrators of the system can sort all the resources that have completed a survey by name, municipality, survey type (individual and facility), status (active, archived, deleted), or chronologically by last update. Archived surveys will remain on the list and can be sorted or filtered through the advanced search feature. By default, the surveys are sorted alphabetically. The sort functionality is built into the heading of the corresponding column. Users simply click on the heading title to change the sort order.

An administrator who has the appropriate permissions will be able to add, edit, delete, or archive surveys from the dashboard. Each survey must be classified as one of the three available statuses: Active, Archived, or Deleted. Although deleted surveys will be removed from the listing, they will not be permanently deleted from the system. This is referred to as a "soft" delete. Deleted surveys can only be retrieved through an advanced search query.
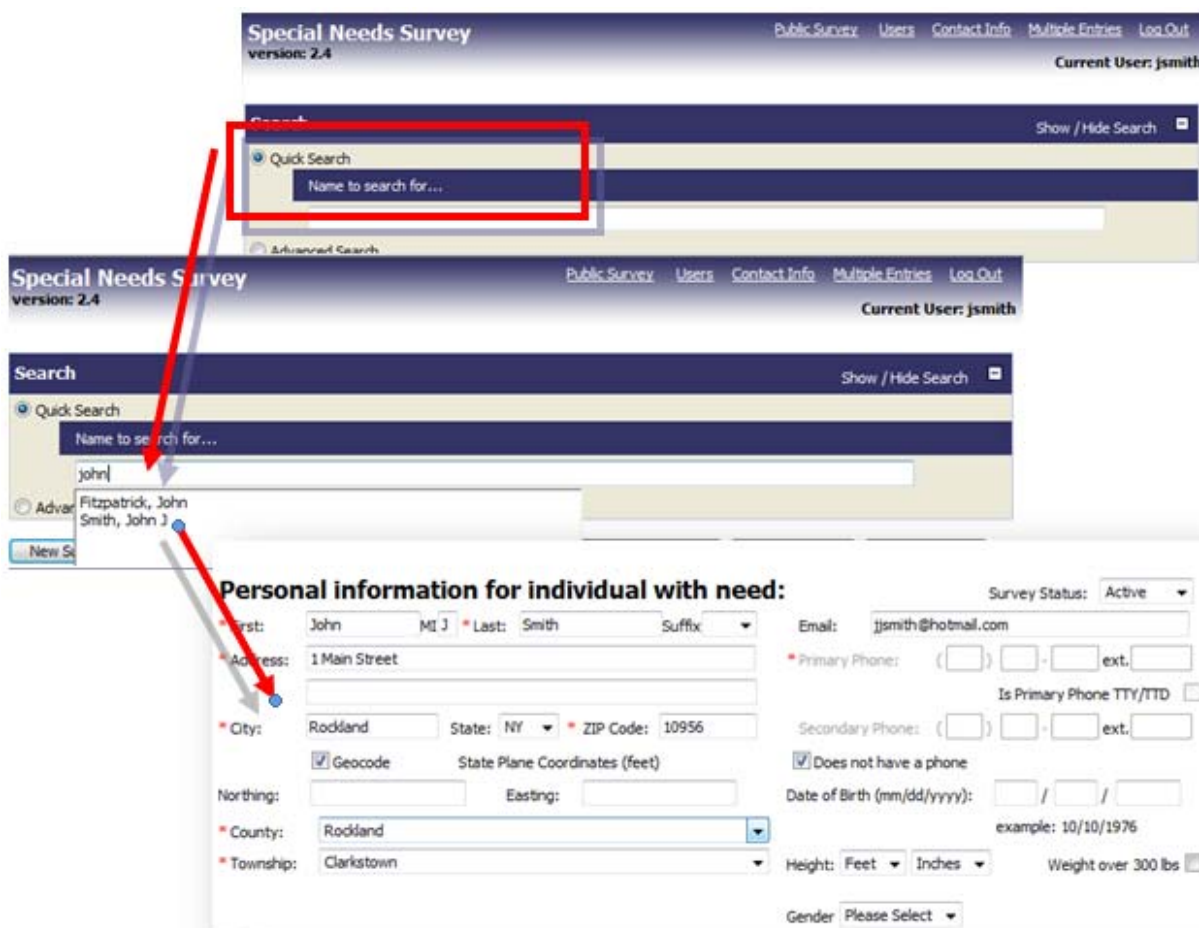
Listing and Search (Continued)

Quick Search

Administrators access the search functionality by expanding the Show/Hide Search feature on the dashboard. Narrowing the search for a resource can be done by applying search criteria using the Quick Search or Advanced Search features in the system. Later in the lesson, we will demonstrate how to sort, search, and print reports.

The Quick Search feature allows administrators to find a survey in the system by simply entering the first letters of either an individual's first or last name, or the name of the facility in the space provided. Once the survey has been found, the administrator can double-click on the name to open the rapid entry form and see the details of the survey.

Figure 27: Quick Search Feature

Listing and Search (Continued)

Advanced Search

A convenient and easy way to search the system is to use Quick Search when you need to find one resource (individual or facility) at a time. The Advanced Search feature helps administrators to create a more comprehensive list of resources. Depending on the situation, applying the conditions and criteria to filter surveys and narrow the search to a more focused group of people with special needs helps administrators manage their data and provide better preparation for an evacuation or other events that require specific resources.

Figure 28: Advanced Search Feature
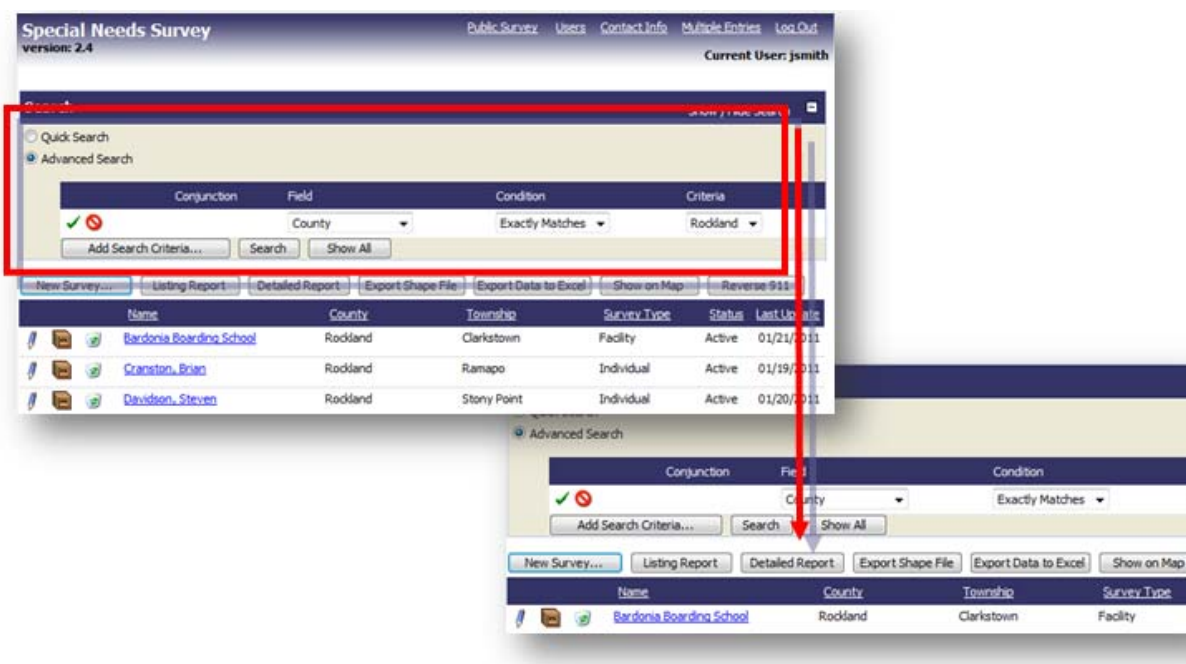
There are many criteria one can use to build a comprehensive search or filter the data in the system. Obviously, choosing the appropriate criteria to get the exact results is essential. Performing an advanced search query requires that an administrator have a thorough knowledge of the information contained in a survey, the types of conditions to search on, and how to conjoin the queries. Once an advanced search has been created, the surveys that match the advanced search criteria will populate the Listing and Search dashboard. To see the details of a survey, administrators have the option to generate a detailed report or open the rapid entry form that displays the individual's or facility's details.

Listing and Search (Continued)

Survey Page

All individual and facility resources displayed in the Listing and Search dashboard are linked to a survey page. As mentioned earlier, to see the details of a survey, one would click on the hyperlinked name on the Listing and Search section of the dashboard.

A survey page includes all of the information about an individual or facility (i.e., address, phone number, email address, county, date of birth, etc.) provided in their survey response. An asterisk (*) denotes required information. The survey page is also referred to as the Rapid Entry Survey Form that will be discussed briefly in the Survey and User Management section of this User Guide.

Figure 29: User Info & Permissions Tab

Listing and Search (Continued)

Exercise 7:

Quick Search

This exercise will demonstrate how to quickly search for an individual or a facility survey in the system.

1. **Log into** the system with an administrator's account.

2. **Find** the Quick Search tool on the dashboard.

3. **Click** in the field for the Quick Search option and begin typing the first letter of either the last name or first name of the individual or facility you want to find in the system.

4. If the individual or facility exists, the name will populate the Quick Search field. **Click** on the link to open the survey form.

Advanced Search

This exercise will demonstrate how to perform an advanced search on the data in the system. Selecting the appropriate criteria and conditions, the system will filter the data and only those survey records will be displayed. This allows administrators to more efficiently manage the data and the resources needed in the event of an emergency.

1. **Log into** the system with an administrator's account.

2. **Find** the Advanced Search option on the dashboard. You may need to expand Show/Hide to see the Advanced Search option.

3. **Select** the criteria from each drop-down menu to build a query.

4. **Choose** a conjunction to build a more complex query to narrow your search.

Public Survey

The administrative module includes a hyperlink from the dashboard to the Account Information section of the Public Survey. The administrators who have been assigned rights to specific surveys also have access to the surveys from the Public Survey link that allows them to review the Public Survey process.

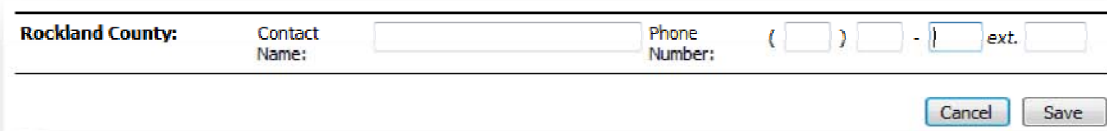**Figure 30: Public Survey Access**
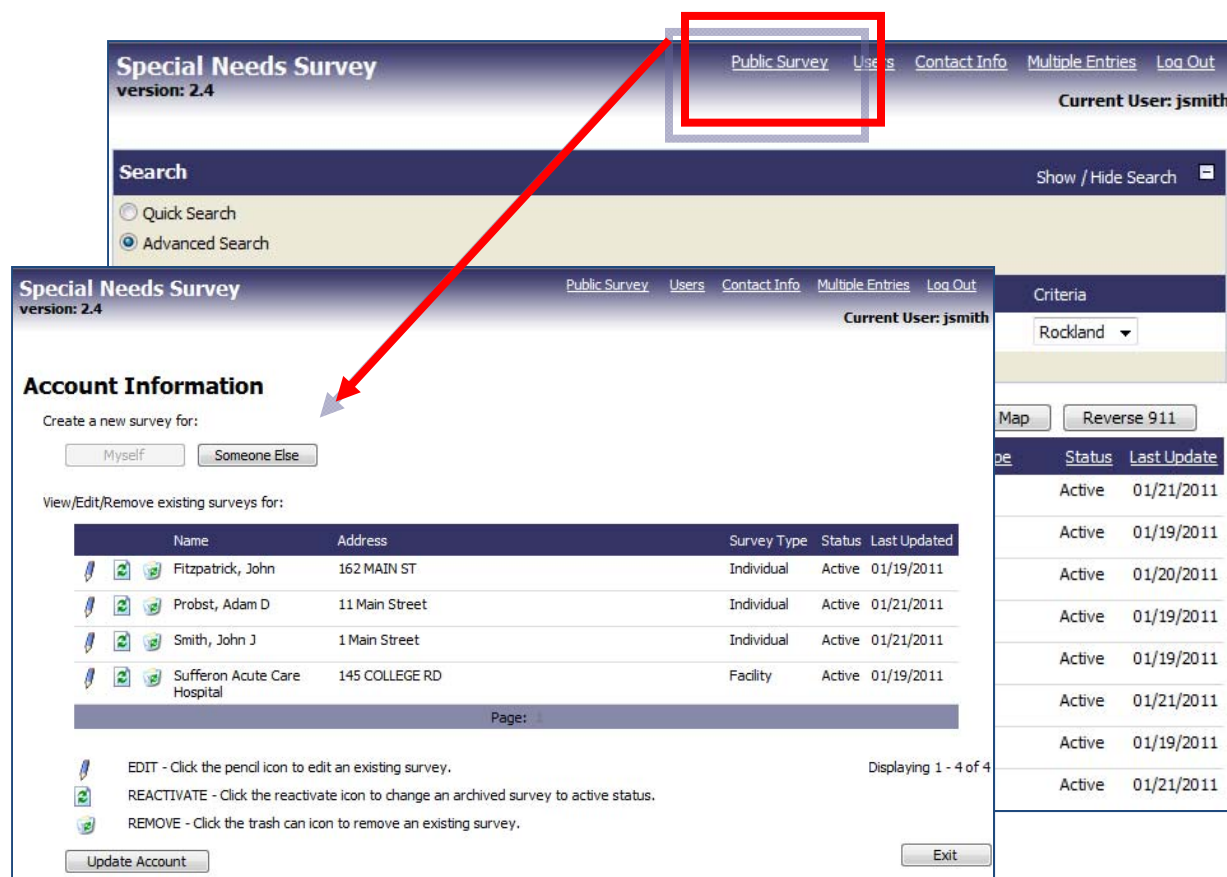
Note: The Public Survey is in a wizard-style format and assists a special needs individual or public users through the survey step by step. For detailed information on public surveys, please see the section on Completing Public Surveys.

Contact Information

The Contact Information Sheet will provide the name of the resource that will be the official point of contact for questions, clarification, and any other issues that may arise during the process of managing the surveys in the system. Only the assigned county or municipal administrator will have the ability to edit the contact details.

Figure 31: Contact Information Sheet

Multiple Entries

In certain circumstances, more than one person may complete a survey for the same individual. The administration of the Registry supports a feature that allows survey administrators to audit and remove duplicate entries of individual surveys. A multiple entry report can be generated from the dashboard to display the list of duplicate surveys. If the same individual has been entered multiple times into the Registry, the duplicate survey may be deleted from the list. The list will be re-populated with the updated entries and the survey will be permanently removed from the system. Multiple entries are found based on matches of the last name, partial first name, and the address.

Figure 32: Multiple Entry Report

Survey and User Management

Rapid Entry Surveys Forms

A Rapid Entry Survey Form allows administrators to enter new surveys for individuals or facilities en mass from paper forms, telephone calls, or other methods of collecting data. The Rapid Entry Survey does not follow the wizard-style format of the public entry survey. To utilize the Rapid Entry functionality, an administrator would click **New Survey…,** found on the Listing and Search dashboard. A pop-up displays and provides the option to choose to complete a survey for either a person or facility survey type.

Figure 33: Listing and Search
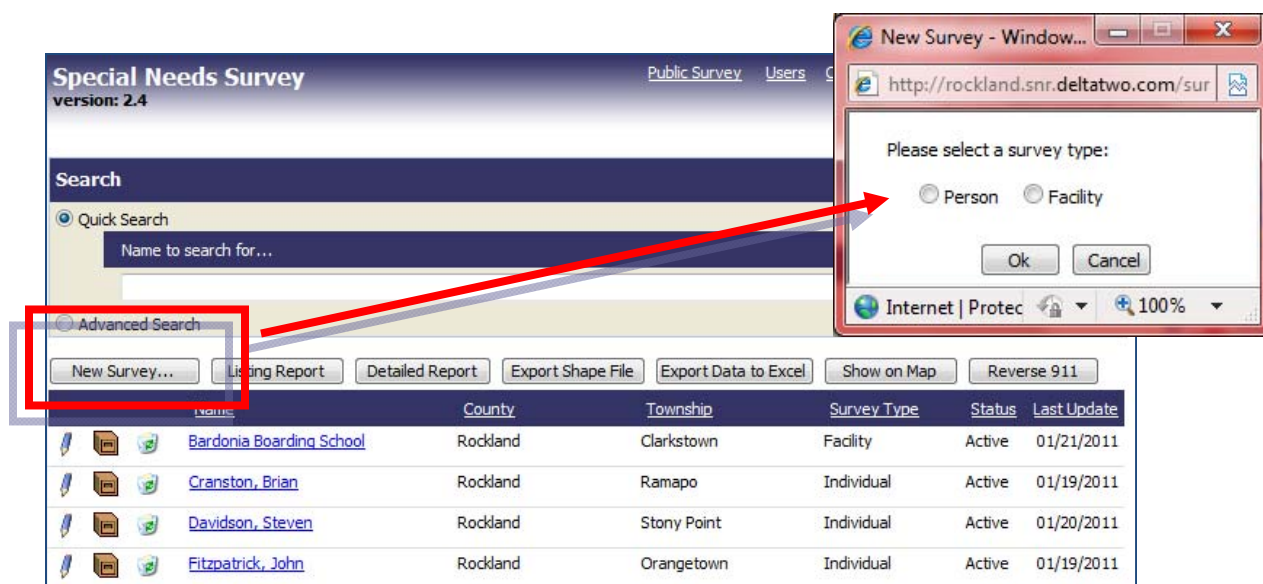
Rapid Entry Surveys (Continued)

As shown below, a Rapid Entry Survey Form for an individual or a facility contains the same information as that found on the public survey. The difference is that an administrator can quickly fill out the survey and change it without having to navigate back through each section. In addition, there is no need to exit the existing rapid entry form to begin a new one. The option to Save and Create a new survey is provided on the form for both individual and facility surveys.

Figure 34: Rapid Entry Survey (Individual)

Figure 35: Rapid Entry Survey (Facility)

Facility Surveys

A special needs facility is a physical structure within which individuals reside (either permanently or temporarily) and who may be at an increased risk during a disaster when orders to evacuate or shelter-in-place are given. Once a possible facility has been identified, along with all associated resources, they are entered into the Registry. The information provided will be used, in conjunction with information gathered at the time of the incident, to enable decision makers to allocate resources and provide support during times of disaster.

A facility survey consists of several specific sections that collect important information about a facility, including its physical assets and staffing. The questions included in each section of the survey should be answered and completed as accurately as possible to provide the necessary information to first responders and emergency management personnel for pre-planning and response purposes. Below is a list of the sections included in the facility survey and a brief explanation of the reason why this information is collected.

The following sections are to be completed by an administrator or designated facility personnel:

- Facility Information – General information about the facility is collected in this section, such as the name of the facility, address, county, municipality, a 24-hour staffed telephone number, the average population or census, the type of facility, the managing agency, and administrative contact information. Similar to the functionality of an individual survey, these fields are required and denoted by an asterisk. Those fields must be answered before moving onto the next section.

- Self-Sustainment Section – This section allows the respondent to answer specific questions about the ability of the facility to sustain its residents or conduct sheltering-in-place in the event of an emergency. In addition, it's helpful to know if the staff is trained to evacuate residents and if the evacuation procedures are practiced on a regular basis.

- Transportation Information – In the event that an emergency is declared and evacuation procedures must be initiated, a facility's ability to handle transportation issues is critical. Each facility that registers in the system is asked to provide any and all information about their ambulance service they provide, if they are contracted, or have a Memorandum of Understanding (MOU) with another facility to provide services and support, and provide an inventory of the types of vehicle(s) that are maintained at the facility for transportation.

- Additional Questions and Comments – based on the type of facility, the survey may present additional questions that are specific to that type. For example, if the facility is a skilled nursing center, the respondent must indicate the training level of the highest trained individual. Options are provided on a drop-down list.

Facility surveys can be accessed by users who have been given pre-assigned facility survey permission to edit or complete the surveys. Additionally, the **Facility** survey button will appear on the Account Information page for individuals with only facility administration rights.

Facility Surveys (Continued)

Public users who do not have facility administration permission cannot create but may edit pre-assigned facility surveys. The facility survey will appear on the list on the Account Information page. To restrict public users from creating a facility survey but allow them to edit one, the user must be associated with the facility. Associating users is done by selecting the **Associate User** option found on the Rapid Entry Survey Forms. *(Refer to the Associate Users section of this User's Guide for more information.)*

> *Note:* Only an Administrator may associate users.

Complete a Facility Survey

Exercise 8:

In this exercise, you will complete an entire survey for a facility. You must have rights to administer facilities, or an administrator of the Registry must associate your account with a facility survey in order to maintain that particular survey or surveys. *(Refer to the User Administration and Associate Users sections of this User's Guide for instructions on assigning user permissions.)* Verify that you have the appropriate rights to a facility survey.

1. Log in to the system with the appropriate credentials from the Registry's Registration and Public Login section.

Figure 36: Registration and Public Login Section

2. To begin a new facility survey, click **Facility,** found on the Account Information section.

Figure 37: Facility Survey

Complete a Facility Survey (Continued)

Exercise 8 (Continued):

Facility Information Section

1. Enter the appropriate information into the survey form. If a required field is not completed or the answer provided is not valid, the system will validate the information by highlighting those fields found to be erroneous. Required fields are indicated by a red asterisk and include the following:

   - Average population/census

   - Administrative point of contact and title

   - Valid phone number, including the area code

   - Facility type – for mixed-use facilities, check all that apply

2. Check the option "Same as above" if the address for the managing agency is the same address as that of the facility.

3. Once you have finished entering the information for the facility, click **Next Survey Page>>** to advance to the next section of the survey.

Figure 38: Facility Information

Complete a Facility Survey (Continued)

Exercise 8 (Continued):

Self-Sustainment Section

1. Answer questions #1 through #8 on the **Self-Sustainment** section of the survey.

2. Click on **Next Survey Page>>** to advance to the next section of the survey.

Figure 39: Self-Sustainment Section

Complete a Facility Survey (Continued)

Exercise 8 (Continued):

Transportation Information Section

1. Select Yes or No for questions #9 and #10. If you answered Yes, provide the name and contact number of the service. If you answered No, you may continue to question #11.

Figure 40: Transportation Information Section

2. To add a new vehicle, click **Add New Vehicle**. Indicate the type and capacity of all methods of transportation available at the facility to evacuate the residents. Do not duplicate the resource for multiple buildings if a resource is shared (e.g., an extended care complex with a skilled nursing building and an assisted living building share a van. The van should be entered under only one of the facilities, not both.)

Complete a Facility Survey (Continued)

Exercise 8 (Continued):

3. **Select** a vehicle type from the drop-down list. Complete the information in each of the fields.

4. **Click Save** when finished.

5. **Click Close** to close the page.

Figure 41: Transport Services Information

6. **Add** additional vehicles or click **Next Survey Page>>** to advance to the next section.
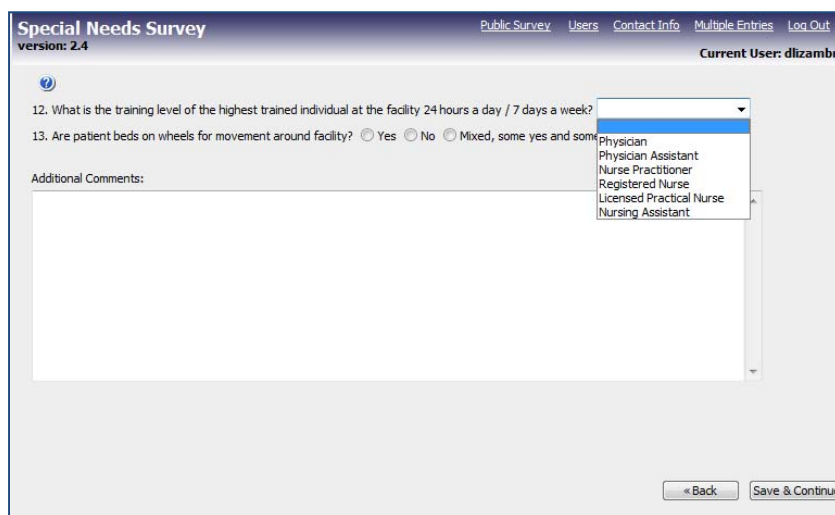
Complete a Facility Survey (Continued)

Exercise 8 (Continued):

Additional Questions

1. Depending on the facility type that was selected on the Facility Information section of the survey, additional questions relevant to the type of facility will be asked at the end of the survey. **Select** the appropriate answers from the drop-down lists provided on the survey.

Figure 42: Additional Questions

2. **Enter** additional comments into the space provided for comments.

3. **Click Save & Continue**. The survey has been saved in the system and will appear on the survey list on the Account Information section.

Figure 42: Additional Questions

Edit a Facility Survey

A facility survey may be edited at any point in time. The user or facility administrator who has been assigned the appropriate rights to that facility survey can log in to the system to edit the information in the facility survey.

Exercise 9:

This exercise will demonstrate how a facility administrator can edit the information for an existing facility survey.

1. **Click** ✏ from the survey basket to edit an existing facility survey.

2. **Click Next Survey Page>>** on each section to edit the survey.

3. **Click Finish** when you have finished editing the survey.

Figure 44: Edit a Facility Survey

Delete a Facility Survey

A facility such as a nursing home or an adult day care, for example, may either relocate, close their operations, or be subjected to other situations that may change the nature of their operations or assets. In these situations, the facility administrator may need to remove a facility's survey from the Registry.

Exercise 10:

This exercise will demonstrate how to remove or delete facility surveys from the Registry.

Note: The delete feature does not permanently delete a survey from the Registry. The survey is stored in the database but is no longer displayed in the Account Information section. This is what is referred to as a "soft" delete.

1. **Click** 🔁 to delete a facility survey.

Figure 45: Remove a Facility Survey
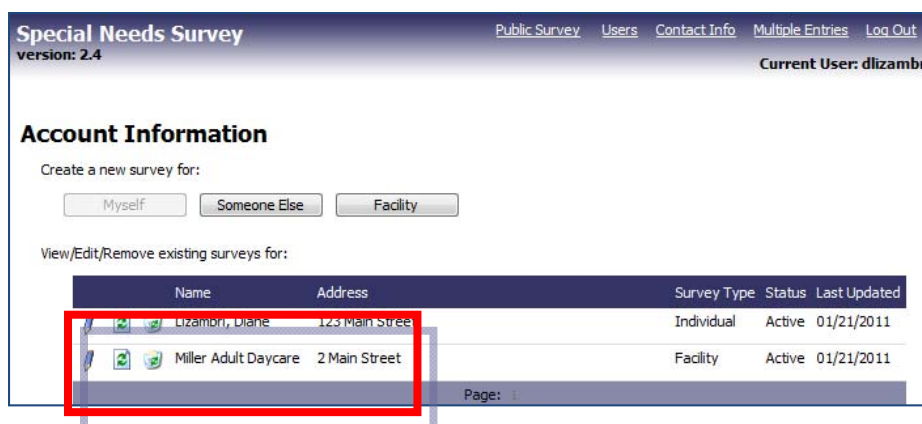
2. **Click OK** to accept the deletion of the survey.

Figure 46: Deletion Confirmation
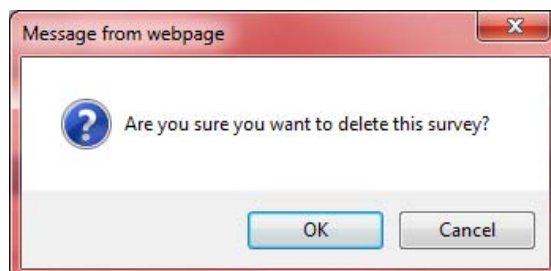
User Administration

The User Administration is the core component for maintaining users. The system provides the ability for a central system administrator to set up and maintain (add, edit, delete) administrators and end users, and assign the appropriate rights or access levels.

Figure 47: User Administration
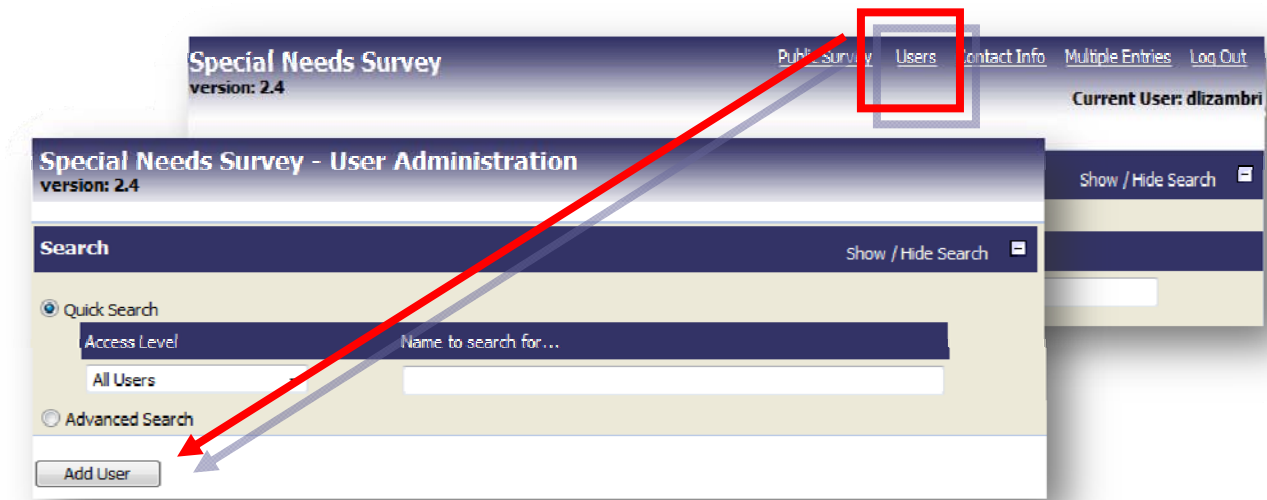
User Administration (Continued)

A User's Information page is created when a new user is added to the system. User Info and User Permissions tabs are available to enter information.

User Info Tab:

- o Requires first and last name, a username, and a password
- o Space is provided for a middle initial and a suffix, an email address, primary and secondary phone numbers, and a complete mailing address
- o Option to select teletypewriter (TTY) designation for the primary telephone number
- o An email is automatically delivered to the user if the password changes for the account
- o Option to assign a user as a Facility Administrator

User Permission Tab:

- o Allows users to set the access level
- o Offers ability to change the role of the user to Administrator

Note: *A user account is created for every individual that registers in the system.*

Figure 48: User Info & Permissions Tabs
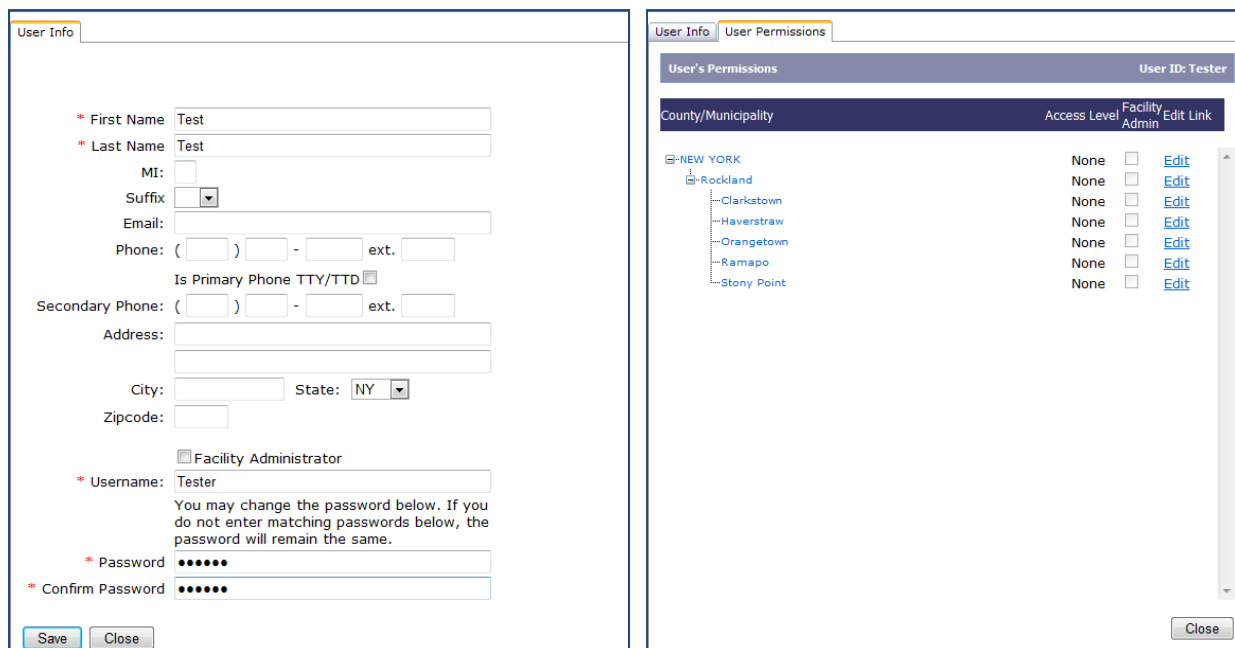
User Administration (Continued)

Table 1 defines the user type and their permission levels for the Special Needs Registry Survey Application.

Table 1

User Type	Permission Level
Public User	Access to Public Survey to: – complete their own survey – create/edit/delete individual surveys for someone else that they have created – create/edit/delete pre-assigned facility surveys – view county contact information – update own account information
Facility Administration User	Access to Public Survey to: – complete their own facility survey – create/edit/delete individual surveys for someone else – create/edit/delete facility surveys – view county contact information – update own account information
Application Administration User	Access to Special Needs Registry Survey Application to: – maintain administration of users and their permissions – create/edit/delete individual surveys via public entry survey form – view county contact information – remove multiple entries – create/edit/delete individual and facility surveys via rapid entry survey form – generate reports – perform searches – export shape files – utilize GIS map data and tools
Facility and Application Administration User	Access to Special Needs Registry Survey Application to: – maintain administration of users and their permissions – create/edit/delete individual surveys via public entry survey form – view county contact information – remove multiple entries – create/edit/delete individual and facility surveys via rapid entry survey form – generate reports – perform searches – export shape files – utilize GIS map data and tools

User Administration (Continued)

Create a New User Account

The User Administration module provides administrators of the system the ability to create user accounts and assign permissions to each user. The administrator must have the appropriate rights to create accounts and assign permissions.

Exercise 11:

This exercise will demonstrate how to create a user account from within the user administration module and assign the user rights.

1. **Log in** to the Registry (must have the appropriate administrative rights to create user accounts).

2. **Click** on the Users link at the top of the dashboard. The User Administration section will be displayed.

3. **Click Add User** from the User Administration section.

4. Once the User Info tab is displayed, **fill** out the necessary information. Required fields are denoted with red asterisks.

5. **Assign** a username and password, and **use** a combination of at least six characters, numbers, letters, etc., for a strong password.

6. **Check** the option to assign the Facility Administrator rights for this user.

Figure 49: Create a New User Account

Create a New User Account (Continued)

Exercise 11 (Continued):

Figure 50: Create a New User Account - Permissions

7. **Click Save** to save the user information. The system will save the data and a new User Permissions tab will be displayed next to the User Info tab.

8. **Click** on the plus sign next to the county. This will expand the list and allow you to **set** specific permissions for the user down to the municipal or town level.

9. To display the permissions tab, **click** on the Edit hyperlink for the county or town.

10. **Select** the access level from the drop-down menu.

11. If the user is going to be an administrator, **check** the Administrator role, and save the changes.
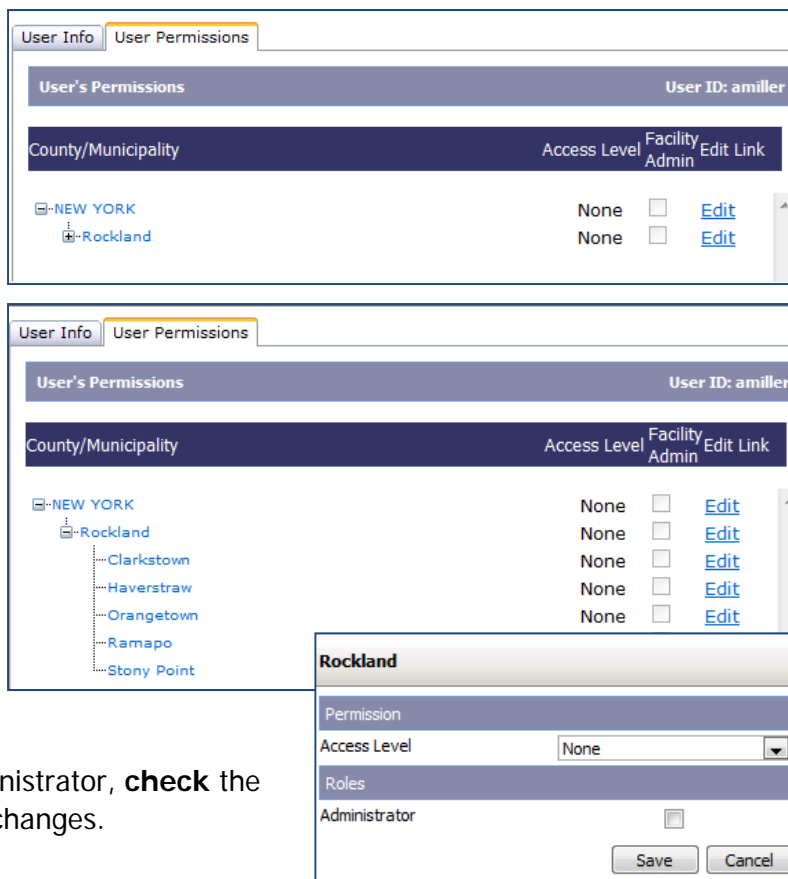
Associate Users

Users other than administrators of the system may manage specific individual and/or facility surveys. An administrator assigned with the appropriate permissions may choose a designated user(s) to be associated to other surveys. For example, an emergency management coordinator may associate one or more facility surveys in a specific township or borough to a first responder or a volunteer. The Associate User option is available for both survey types, although they may only be assigned through the Rapid Entry Survey Form. This allows the user to complete, edit, or delete a survey for another individual or facility.

Exercise 12:

This exercise will demonstrate how an administrator can associate other users of the system to help maintain and manage surveys.

1. **Edit** an individual's Rapid Entry Survey Form from the dashboard.

2. To associate a user, **click Associate User** from the rapid entry form. The User Administration section will be displayed.

3. **Select** a name from the list by clicking on the checkmark, or add a new user and associate it to a survey.

4. **Click Save** at the bottom of the survey form to save the changes.

5. **Click Close** to close the survey form and return to the dashboard.

Figure 51: Associate User – Rapid Entry Survey (Individual)

Associate Users (Continued)

The Quick Search and Advanced Search features are also available in the User Administration section to find a particular user to associate to a survey. The Quick Search Access Level menu lists the different types of access level users in the system: all access levels, basic user, application administrator, and facility administrator. Details about the user can be viewed by selecting the magnifying glass. An example of how to associate a user to a facility survey is shown below.

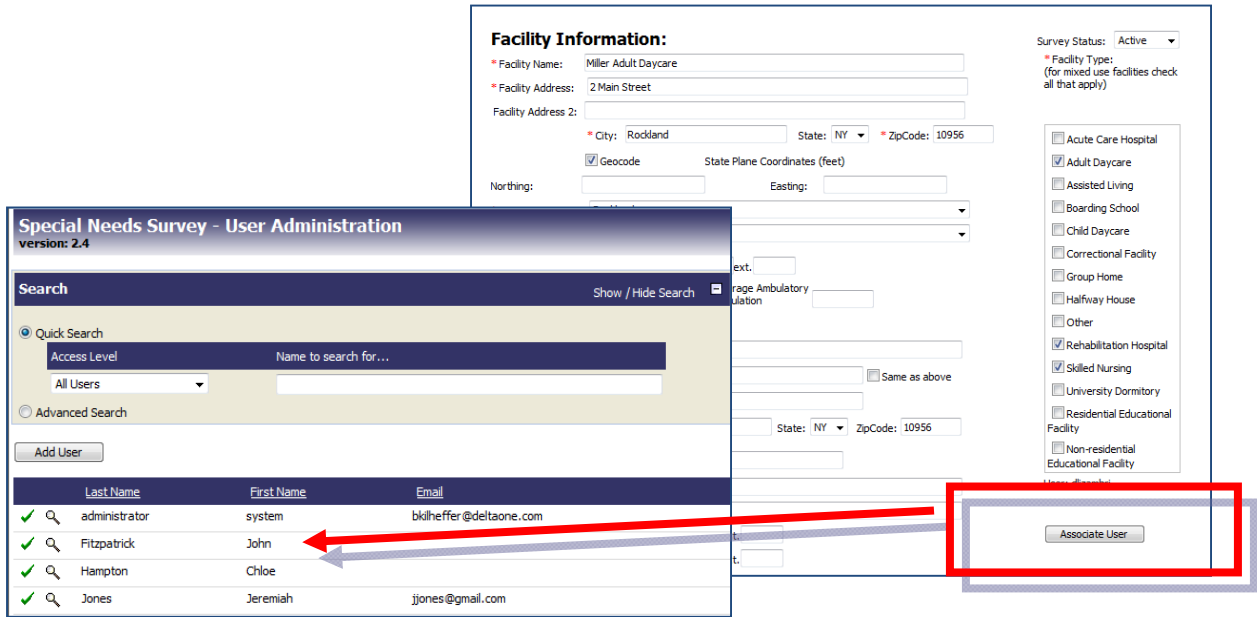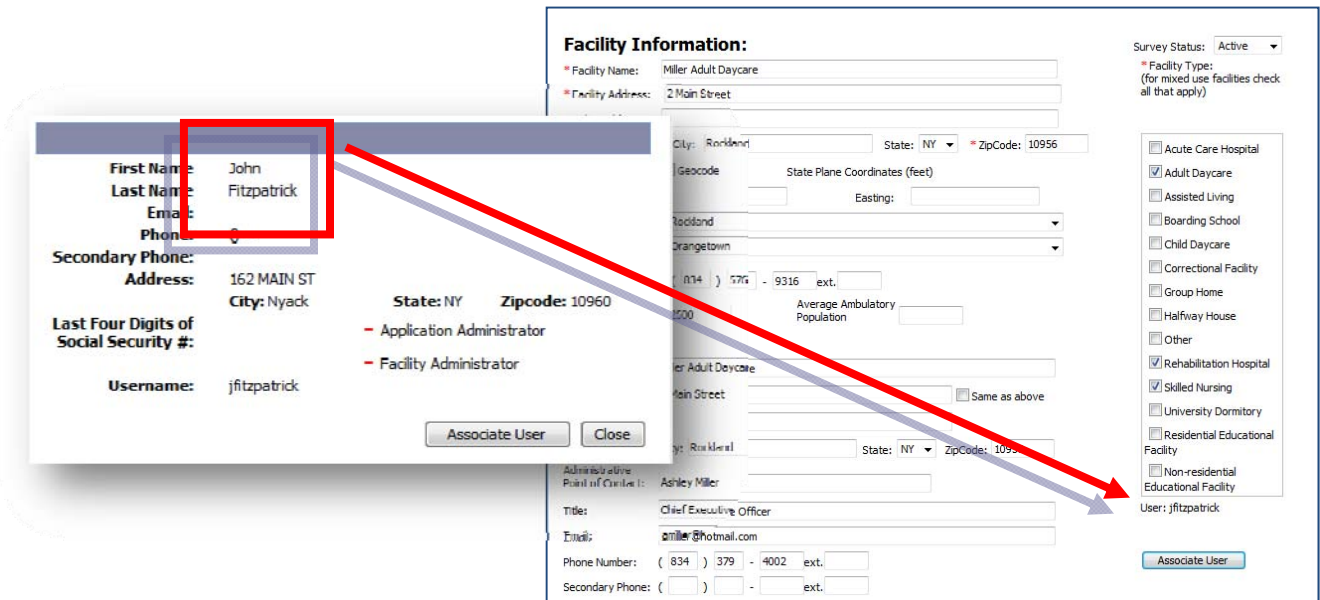**Figure 52: Associate User – Rapid Entry Survey (Facility)**

Figure 53: User Information

Archived Surveys

Another useful feature for managing surveys is the ability to archive surveys. Each survey will expire in the Registry based on the date they were entered into the system. Individual surveys expire at 12 months, and facilities will expire at six months. A survey that has not been updated by its expiration date may be archived in the system. Archiving allows the administrator to identify those surveys where outreach may be necessary to verify the status. If an individual has moved, or a facility is no longer providing a service to the special needs population, the administrator may change the status and remove the survey from the list. Periodic notifications are sent to the respondent and the administrator.

Note: *More details about expiration notification will be discussed later in this Guide.*

Exercise 13:

This exercise will demonstrate how surveys can be archived in the system. Archived surveys will remain in the system and can be searched by choosing the Survey Status from the drop-down list, and selecting "Archived" under Advanced Search. Surveys that have been archived can be made active by changing the status from within the survey form.

1. **Login** to the system with an administrator's account.

2. **Perform** a quick search or an advanced search to find a survey that will be archived in the system.

3. Once you have found the survey, **open** the form.

4. **Locate** the Survey Status feature at the top, right-hand section of the form.

Figure 54: Survey Status

5. **Click** on the drop-down menu and choose the Archived option.

6. **Click Save** on the survey form. This survey has now been archived in the system.

Geocoding

The Special Needs Registry Survey Application utilizes geocoding services to locate, spatially display, and match addresses for individuals and facility resources. When an address is entered into a survey and the survey is saved, the system initiates the geocoding functionality to generate the appropriate latitude and longitude. If there are multiple matches, the system will provide a list of possible addresses that match the one entered on the survey. The user can select the appropriate address and the geocoding service will insert the latitude and longitude coordinates into the survey form. The coordinates translate into a reference point indicated by a dot on the Registry's GIS Module map tool. The map's tools, functionality, and features will be described in greater detail later in this Guide.

Figure 55: Multiple Address List
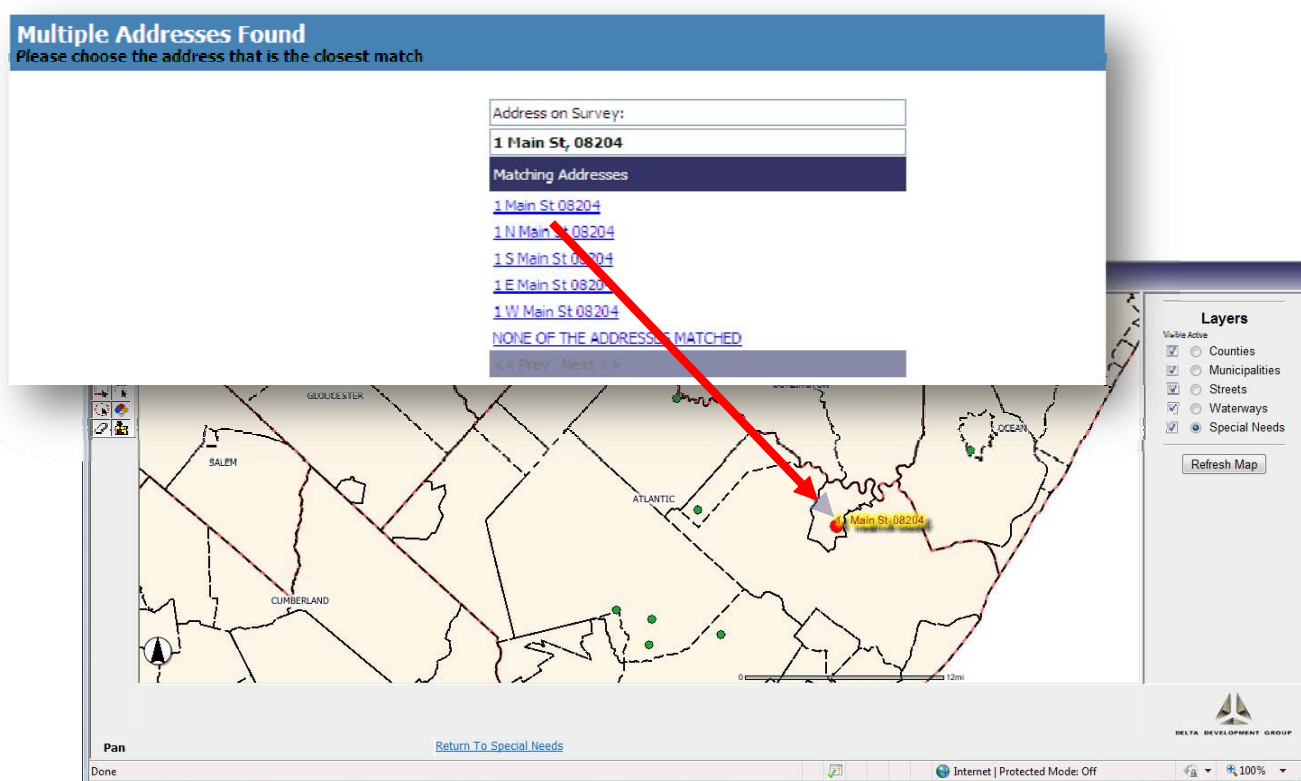
Report and Export Features

The Registry features several reporting tools. Administrators can run listing reports, detailed reports, or export data to shape files and/or an excel file.

Figure 56: Reporting Tools

Listing Report

The Listing Report is a basic report that contains the name of the individual and/or the facility and the contact information, including the address, phone number, and email. The system divides each respondent's survey information by inserting alternating shaded sections.

Figure 57: Listing Report

Report and Export Features (Continued)

<u>Detailed Report</u>

Detailed data entered on individual and facility surveys is included in the Detailed Report as shown in the figure below. Detailed reports are helpful to administrators and first responders to use as a manifest for organizing evacuation procedures, a reference for contacting resources, and a way to verify and maintain information.

Figure 58: Detailed Report

Report and Export Features (Continued)

Export Shape File

The Export Shape File feature allows the user to download a shape file that is created based on the current survey information in the system.

Exported shape files are standard GIS files. Shape files that have been exported from the Listing and Search dashboard can be downloaded and saved to import into a GIS system at any time.
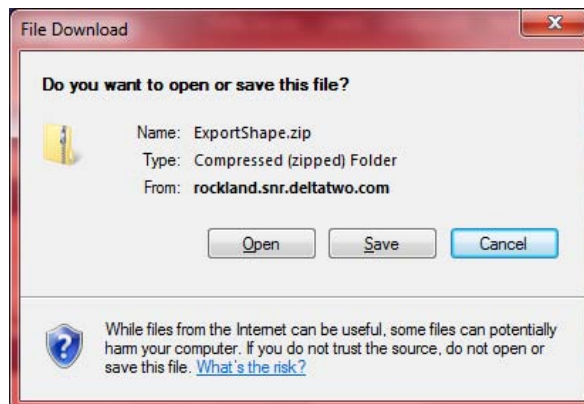
Report and Export Features (Continued)

Export Data to Excel

The data in the system can be exported to a spreadsheet. The Data Export Preview includes the option to preview groups from a drop-down menu. The following groups are included: Application Administration Users, Basic Users, Facility, Facility Administration Users, Custom Search, and Special Needs Individuals. These groups can be exported to a spreadsheet. Once the data is exported, it can be manipulated and used in charts or graphs for demonstrative purposes or for generating mail merges.

Figure 60: Export Data to Excel

Report and Export Features (Continued)

Reverse 911

The Reverse 911 function compiles the contact information from the surveys and exports the data to a file. Administrators of the system will save the file and follow the Reverse 911 procedures to provide emergency management agencies with the necessary information to contact these individuals in the event of an emergency. The exported file may be opened directly from the survey application or saved in one of two format options: PRN (HTML file) or TXT (standard text file).

Figure 61: Reverse 911
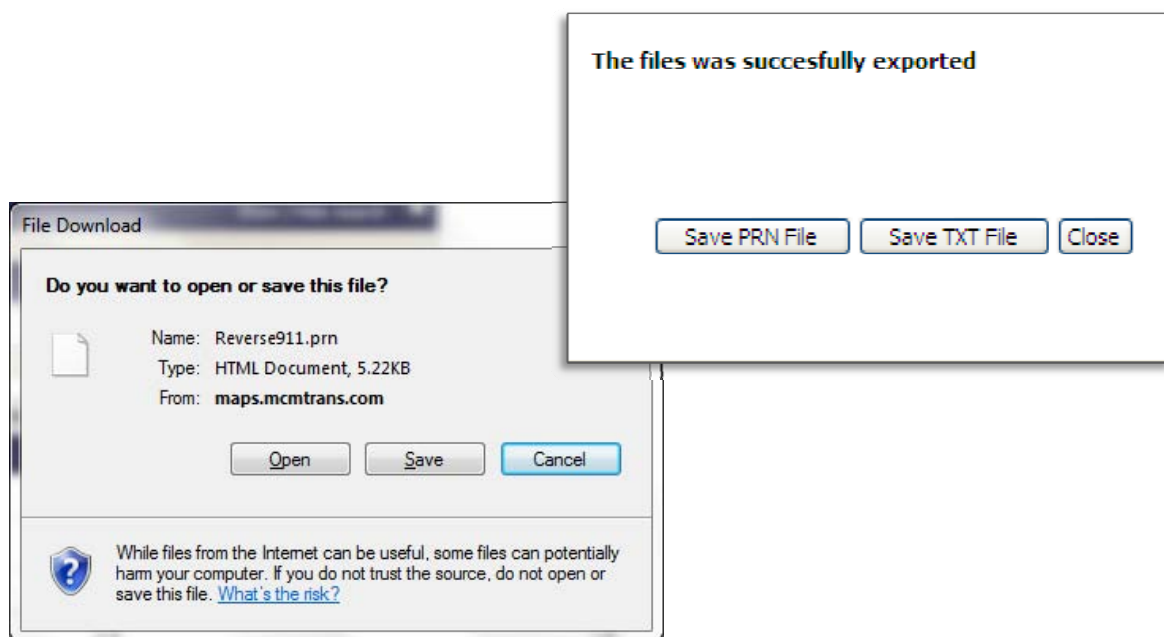
Report and Export Features (Continued)

Exercise 14:

This exercise will demonstrate how to create different manifests or reports using the reporting tools described in the Report and Export Features section.

1. Generate a report that lists the surveys in the system by selecting **Listing Report** from the Report toolbar on the dashboard.

2. Review, print, or close the report when finished.

3. To generate a detailed report, first filter the list of surveys by building an advanced search using any criteria in the system. Click **Search** to display the survey results.

4. Once the survey results have been displayed, click **Detailed Report** from the Report toolbar on the dashboard. Only the filtered list of surveys will be displayed on the report.

5. Review, print, or close the report when finished.

Special Needs GIS Module

The GIS Module allows users to spatially search the Special Needs Registry's database. The system then generates a report of the special needs individuals found within the user-specified location on the map. The GIS component utilizes an ArcIMS platform with shape-file data. The components of the GIS module include map display, selection by geometry, and reporting.

Show on Map

The Show on Map feature will display a map populated with points that identify areas where individuals with special needs reside and where facilities are located.

Layers are built into the design to furnish more information about waterways, streets, and towns. Layers can be displayed by checking one or all the "visible" layer options.

Figure 62: Special Needs GIS Map
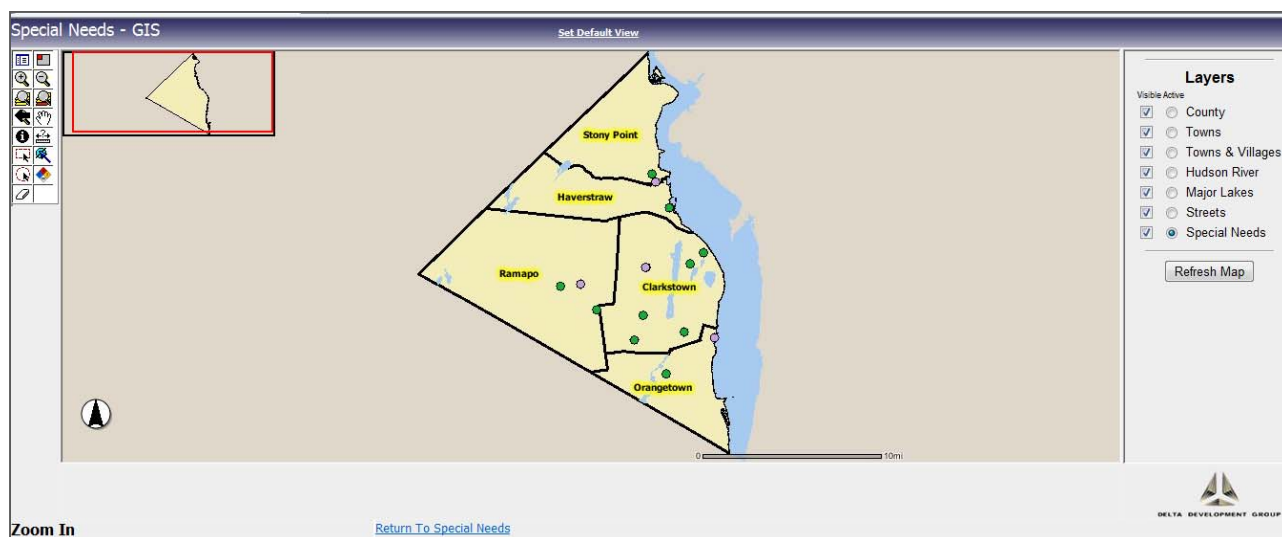
GIS Module (Continued)

Visible Layers

Visible layers are those shown on the map when the option is selected. For example, in the figure shown below, when you use the **zoom** feature, the special needs, waterways, streets, and towns are visible.

Figure 63: Visible Layers
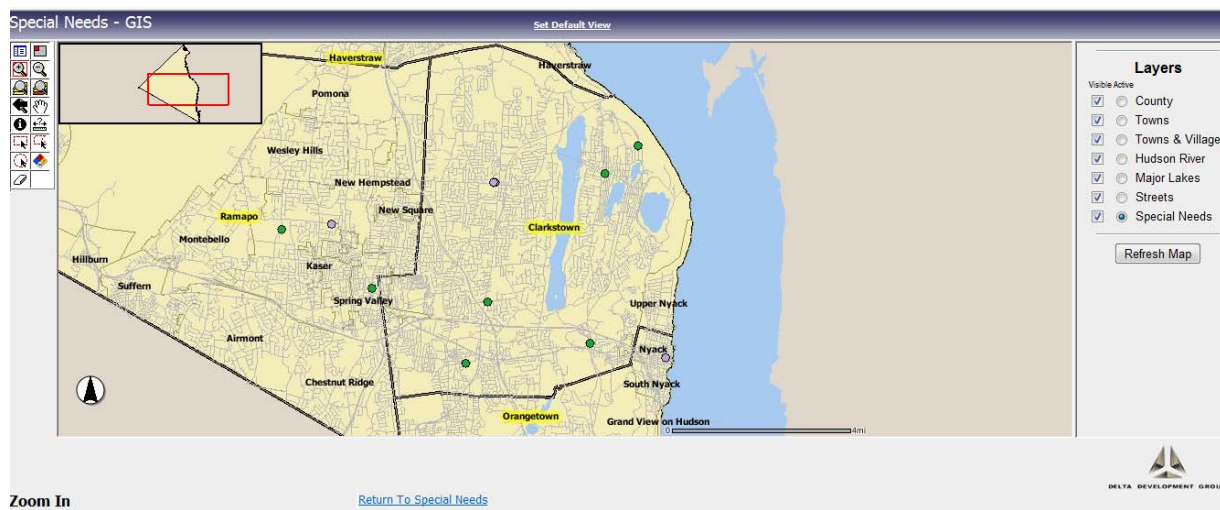
Active Layers

A layer can be activated by selecting the corresponding **active** radio button. Only one layer can be "active" at a time and it is used in conjunction with the selection tools to provide detailed information on those active layers.

Set Default View

The Set Default View feature allows a user to define a certain view other than the standard full mapview that is generated when the GIS module is accessed.

GIS Module (Continued)

GIS Map Tools

The Special Needs GIS Module's map feature has incorporated a set of tools designed to allow a user to interact with the map and incorporated data. Each tool's unique function is described in Table 2.

Table 2

	Toggles between legend and layer lists		Turns map over-view on/off
	Zoom in		Zoom out
	Zoom to full extent		Zoom to active layer
	Back to last extent – Zooms to the last map view that was generated		Pan – Grabs and moves the map in any direction
	Identify – Retrieves detailed information for active layer features		Measure – Measures distance between multiple points
	Select by rectangle – Drags pointer across an area and displays information about those points selected		Select by polygon – Allows you to select points on a map to complete a polygon and retrieves detailed information for the active layer
	Select by circle – Selects an area on the map based upon the number of miles entered into the radius field		Hazmat – Defines areas affected by hazardous material accidents by isolation distance, hazardous area distance, and wind direction
	Clear selection – Clears the current selection points		

GIS Module (Continued)

Select by Circle

The Select by Circle tool allows users to perform a radius search. Once the tool has been selected, a radius distance field is displayed at the bottom of the map, as shown in the figure below. Users enter a radius distance and click the epicenter on the map. A map data table is then automatically generated to display the detailed information of the points contained in the selected area.

Figure 64: Selected Area by Circle and Corresponding Map Data Table
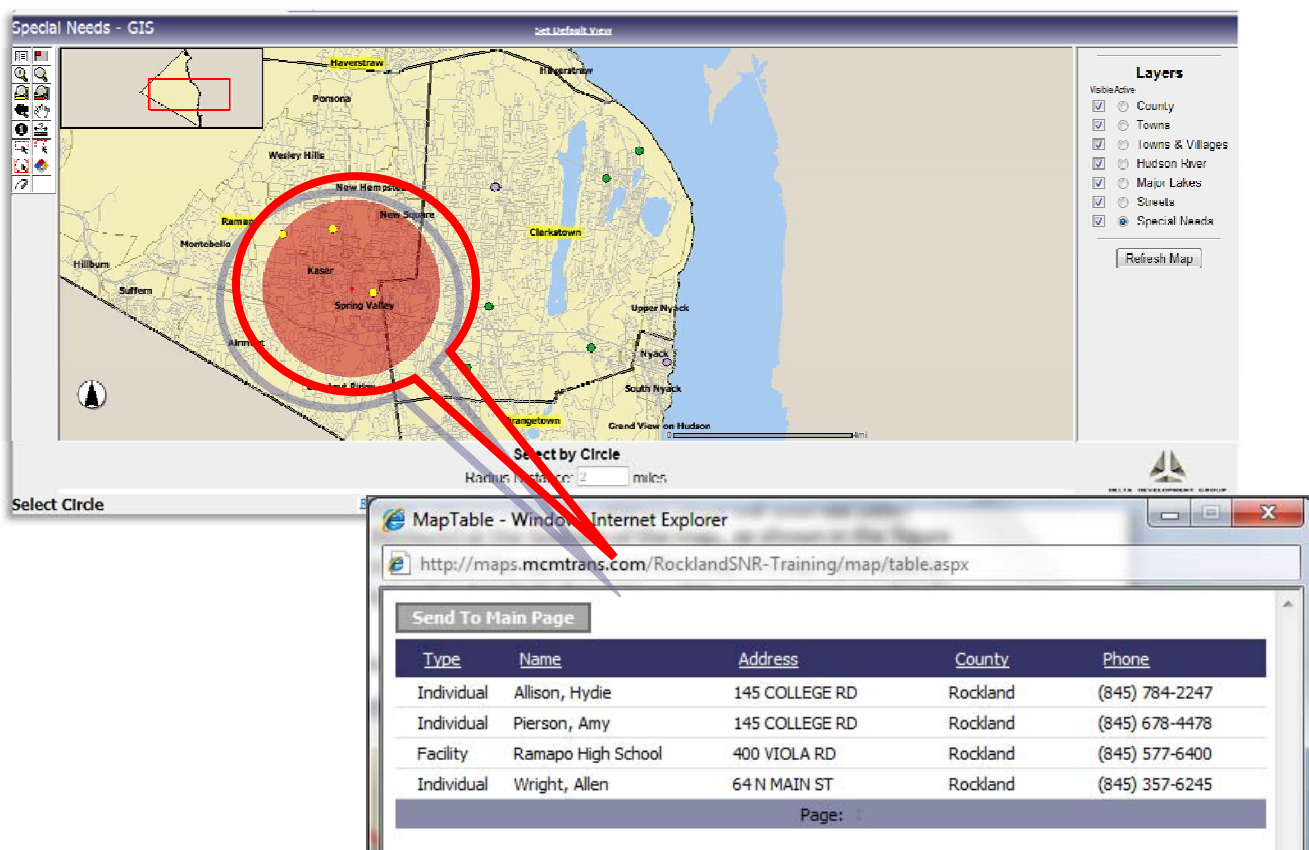
GIS Module (Continued)

<u>Hazmat Tool</u>

In the even an accident occurs, users can quickly identify the area affected by the spill or contamination by selecting the Hazmat tool. The initial isolation distance and protective action distance are entered in the corresponding fields at the bottom of the map, as shown in the figure below. The distance can be measured in feet, meters, miles, or kilometers. In addition, to calculate the wind direction, to further define the affected area, users enter the degrees for the wind direction. Once the calculated information has been entered, users click a point on the map at the incident location. The affected area will be highlighted showing the isolation distance and an estimated downwind hazard area. A map data table is automatically rendered to display the detailed information of the points contained in the selected area.

Figure 65: Hazmat Tool
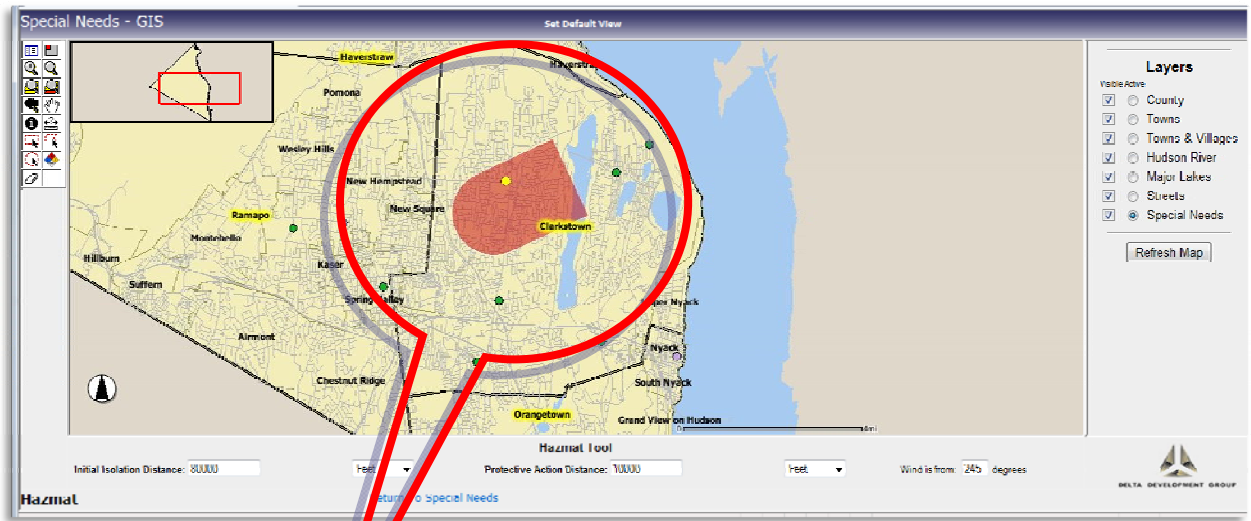
Figure 66: Special Needs Information Table

Mass Email Capability

Mass emailing is a process programmed to start automatically at a pre-defined time within a 24-hour period. There are several emailing processes built directly into the Special Needs Software. These processes search the database for records that have not been updated at pre-established intervals. If records are found that have not been updated, an email will be sent automatically, to notify the individual that he/she needs to update the information.

Individual surveys are required to be maintained on an annual basis. Facility surveys are required to be updated on a semi-annual basis.

Individual 30-Day Expiration Email

An individual account will receive an email 30 days prior to their annual expiration date, or eleven months since their account was last updated. An example of an individual 30-day expiration email notification is detailed below.

> *Thank you for staying prepared and maintaining your **Special Needs Registry Account**.*
>
> *Please ensure you have reviewed your Individual Preparedness Plan and updated your Special Needs Registry Account.*
>
> *You are receiving this message because either your account information or an individual you have registered an account for will expire in 30 days.*
>
> *Please click this link to confirm and update your registration: [yourURLhere.xxx]*
>
> *Thank you,*
> *Rockland County Special Needs Registry*
>
> ***Please do not reply to this email. It is being sent from an unmonitored account.***
>
> ***Should you need additional assistance to access your account**, please* ***contact Rockland County's Emergency Management Agency.***

Mass Email Capability (Continued)

Individual Expired Email

If a user does not update their account within the 30-day window, a second email will be sent stating that their account has been made inactive, and is no longer accessible within the Special Needs Registry. If a user wishes to re-activate the account, they would need to contact the appropriate county or municipal administrator. An example email notification regarding an individual's expired account is shown below.

> *Thank you for staying prepared and maintaining your **Special Needs Registry Account**.*
>
> *Please ensure you have reviewed your Individual Preparedness Plan and updated your Special Needs Registry Account.*
>
> *You are receiving this message because either your account information or an individual you have registered an account for is no longer active.*
>
> *Please click this link to confirm and update your registration: [yourURLhere.xxx]*
>
> *Thank you,*
> *Rockland County Special Needs Registry*
>
> ***Please do not reply to this email. It is being sent from an unmonitored account.***
>
> ***Should you need additional assistance to access your account, please contact Rockland County's Emergency Management Agency.***

A system administrator will receive a monthly email detailing the number of current registrants, number of new registrants, and the number of accounts that have expired.

Mass Email Capability (Continued)

Facility 30-Day Expiration Email

A facility that has registered in the system will receive an email 30 days prior to their semi-annual expiration date or five months since their account was last updated. The 30-day facility survey expiration email notification is show below.

> *Thank you for staying prepared and maintaining your* ***Facility's Special Needs Registry Account****.*
>
> *Please ensure you have reviewed your Facility's Preparedness Plan and updated your Special Needs Registry Account.*
>
> *You are receiving this message because your facility account will expire in 30 days.*
>
> *Please click this link to confirm and update your registration: [yourURLhere.xxx]*
>
> *Thank you,*
> *Rockland County Special Needs Registry*
>
> ***Please do not reply to this email. It is being sent from an unmonitored account.***
>
> ***Should you need additional assistance to access your account, please contact Rockland County's Emergency Management Agency.***

Mass Email Capability (Continued)

Facility Expired Email

If a facility administrator does not update the account within the 30-day notification period, a second email will be sent stating that their account has been turned inactive and is no longer accessible within the Special Needs Registry. If a user wishes to re-activate the facility account, they would need to contact the appropriate county or municipal administrator to reactivate the account. An example of a facility's email notification about the expired account is shown below.

*Thank you for staying prepared and maintaining your **Special Needs Registry Account**.*

Please ensure you have reviewed your Facility Preparedness Plan and updated your Special Needs Registry Account.

You are receiving this message because your facility account is no longer active.

Please click this link to confirm and update your registration:
[yourURLhere.xxx]

Thank you,
Rockland County Special Needs Registry

Please do not reply to this email. It is being sent from an unmonitored account.

Should you need additional assistance to access your account, please contact Rockland County's Emergency Management Agency.

Mass Email Capability (Continued)

Administrative Monthly Email

Rockland County Special Needs Registry Monthly Status Report

	Individuals	*Facilities*
Number of current registrants	*45*	*8*
Number of new registrants this month	*11*	*3*
Number of accounts that are expired	*4*	*1*

Thank you,
Rockland County Needs Registry Administrator

Please do not reply to this email. It is being sent from an unmonitored account.

Should you need additional assistance to access your account, please contact Rockland County's Emergency Management Agency.

Help Information

The individual may contact the Rockland county or municipal administrator to answer any questions or if they are uncertain how to respond to a question. The contact information is available by clicking on 🔵 on any page throughout the survey.

Figure 69: County Phone Directory