DEMES Mutual Aid Job Aid
Create & Submit Claim

Updated October 23, 2023
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Introduction

**Purpose & Objectives**
The purpose of this document is to provide users FDEM an overview of the views of the externally-facing Mutual Aid Portal for assisting agencies that serves as their landing point to view, apply for, and track status of missions, resource support agreements/cost estimates, and claims. This document serves as a self-guided learning with details on features and accompanying visuals.

**Outcomes & Benefits**

**Streamlining the Digital FDEM Processes | Project Grey Sky**

FDEM is continuously looking for ways to **improve and scale our mission and emergency operations**. Modernizing our processes is part of a larger steppingstone to digitizing and driving efficiencies in the way we operate and serve people.

<table>
<thead>
<tr>
<th>What are we trying to accomplish?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Drive efficiency, accuracy and speed</strong></td>
</tr>
<tr>
<td>By digitizing manual processes, eliminating paper forms, integrating systems and providing a centralized platform with accurate production data</td>
</tr>
</tbody>
</table>
Scenario: Log In to DEMES

Access Mutual Aid Portal
1. Once a Financial Point of Contact logs in, Login (fdemportal.com), they will be taken to the Grants Management Portal.
2. There are two ways the Agency Financial Point of Contact can access the Mutual Aid dashboard. They can either
   a. Select the tile titled Mutual Aid on the right-hand side of the screen, or
   b. Select the heading also titled Mutual Aid in the top left-hand corner.
3. Clicking either icon will navigate to the Mutual Aid dashboard.

Assumptions
The Financial Point of Contact must have already set up their account on the Grant Management Portal as a user, and must already be associated with an Assisting Agency.

Scenario: Claims Process

Create A Claim
A claim should not be initiated until the RSA/Cost Estimate has been approved and fully signed by both the assisting agency and FDEM and the mission deployment has begun.

1. Log in to DEMES.
2. Click the Mutual Aid tab in the header bar.
3. Click the RSAs tab in the header bar.
4. Locate your RSA/Cost Estimate in the Approved column and click the blue RSA-# link.
5. **RSA/Cost Estimate** page will appear, where you can view the cost estimate details via the Cost Estimate tab (next to the details tab).

6. Select **Create Claim** to start the claim process.
   a. Information entered in the Cost Estimate will pre-populate into the Claims request.

   ![RSA/Cost Estimate screenshot](image)

   **RSA/Cost Estimate** page with details:
   - **Resource Support Agreement Name**: RSA-00226
   - **Owner**: Meredith Walker
   - **Date Submitted**: 7/21/2023
   - **Date Approved**: 7/21/2023

7. A **Create Claim** window will appear.
   a. Enter the requested information (FEIN, Mission #, Requesting Entity, Mission Dates).
      i. Your agency name will pre-populate into the Resource Provider field.
   b. Verify the Reimbursement Point of Contact is accurate, as this individual may be contacted by FDEM to answer questions regarding the claim.
      i. If not accurate, search for the contact name, select contact, add email address, phone number.
   c. Once information is added, click **Create**.

   ![Create Claim window screenshot](image)

   **Create Claim** window with input fields:
   - **FEIN #**: 1234
   - **Mission Agreement #**: 2022 lan
   - **Mission Description**: The City is submitting this resource request on behalf of the Island Water Association (IWA) on Sanibel Island for debris removal. The properties where debris removal will occur are: 5566 Sanibel-Captiva Road, 1420 Periwinkle Way, 3651 Sanibel-Captiva R

9. Make note of the various tabs you can view for your Claim Record.
   a. **Details**: tab to view/add agencies costs associated with supporting the mission
   b. **Summary**: Overview of expenses associated with Claim, divided by category (personnel, travel...). Best location to view all total expenses/claim costs in one location.
   c. **Related**: location to view and upload supporting claim documentation

10. Review your cost tabs: **Personnel, Travel, Equipment, Rental, Materials** to ensure costs outlined reflect total costs spent to complete the mission.
    a. Click on each tab to review the cost amounts, update cost estimate to actual amounts, and upload required documentation.

11. Generally, what was estimated is what the agency will claim, but sometimes adjustments are needed.
    a. View the steps outlines in the next few sections to update/edit your claim.

12. If no adjustments are needed to the cost estimate, skip to section: Submission of a Claim.
Review Estimates in Claim

Claim

Here is an example of what a claims page. On this page, you can edit/modify RSA/Cost estimate amounts to reflect accurate expenses. Agencies should review the information outlined in each section (Personnel, Travel, Equipment, Rental, Materials) to ensure it reflects the costs spent to complete the mission. If modifications are needed, click on the desired tab to make edits.

- RT Hours & OT Hours are pre-populated from the RSA and reflect estimated hours worked
- RT Hours (Logs) & OT Hours (Logs) are actual hours worked reflected from Activity Logs

**Personnel**

Agencies may need to adjust personnel and/or hours associated with the RSA, if not done prior to creating the claim. The following actions may be taken from the personnel tab.

- Click the down arrow on the left side (by contact name) to open up activity logs and show backfill.
- Click the down arrow on the right side to Add Backfill, Add Time/Activity Logs, Edit Time/Activity Logs, Add Files, View, Delete
- Note: Rates/Fringe amounts for a contact can not be changed in the claim record. These types of edits can only be made to the contact record.
**Add Backfill**

1. If you need to add backfill to personnel on the RSA/Cost Estimate, click the down arrow (right side) of that individual.

2. From the menu, select **Add Backfill**.

3. A window will appear providing you the ability to add information for a contact to serve as the backfill.
   
   a. Search for the individual's name in the **Contact** field.
   
   b. Select the individual from the search options.
   
   c. Verify **contact information** is accurate or enter in missing information: Regular Hours, OT Hours, Hourly Rate, Hourly OT Rate, Benefit Rates, OT Benefit Rates
   
   d. Note: Enter total hours worked for the mission for Regular Hours & Overtime Hours, not daily amount. Example: over the mission, contact worked 250 hours – enter in 250.
   
   e. Click **Save**.
4. Verify backfill contact has been added to personnel listing, positioned under the appropriate individual.

<table>
<thead>
<tr>
<th>Details</th>
<th>Summary</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>Travel</td>
<td>Equipment</td>
</tr>
<tr>
<td>Backfill</td>
<td>Contact</td>
<td>Check In</td>
</tr>
<tr>
<td>-----------</td>
<td>---------</td>
<td>----------</td>
</tr>
<tr>
<td>Sweta Test3Prod</td>
<td>9</td>
<td>4</td>
</tr>
</tbody>
</table>

5. Time/Activity Records need to be added to the backfill record to populate hours worked and assign associated costs.
   a. Note the backfill does not have time/activity records (RT Hours Logs and OT Hours Logs) columns and costs equal $0.

6. To add Time/Activity records to a contact, follow steps outlined in the Add Time/Activity Records section.

Add Agency Contact to Claim Record
1. If you need to add a contact to backfill a person on the RSA/Cost Estimate, click the down arrow (right side) of that individual.
2. From the menu, select **Add Backfill**.

3. A window will appear. In the Contact field, one can search for a contact in the system or add a new contact. To add a new contact, check the **Can’t Find Your Contact** button.

4. A window will appear. Enter contacts information into the required fields (*). Click the **Create New Contact** button when finished.
5. A window will appear with your new contacts name listed in the Contact field. Enter in the contacts Regular Hours, OT Hours, Hourly Rate, Hourly OT Rate, Benefit Rates, OT Benefit Rates
   a. Note: When entering a new contact, enter total hours worked for the mission for Regular Hours & Overtime Hours, not daily amount. Example: over the mission, contact worked 100 regular hours and 20 OT hours - enter in 100 into the Regular Hours field and 20 into OT hours field.

![Add backfill for Sweta TestProd]

6. Click **Save**.

7. Verify backfill contact has been added to personnel listing, positioned under the appropriate individual.

![Sweta TestProd]

8. Time/Activity Records need to be added to the backfill record to populate hours worked and assign associated costs.
   a. Note the backfill does not have time/activity records (RT Hours Logs and OT Hours Logs) columns and costs equal $0.

9. To add Time/Activity records to a contact, follow steps outlined in the Add Time/Activity Records section.

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### Add Time/Activity Records

1. To add Time/Activity Logs (time worked) to a contact, click down arrow (right side) of that individual.
2. From the menu, select **Add Time/Activity Records**.

3. New window will appear. Enter the **Mobilization date/time** and **Demobilization date/time**, along with **# of Regular Hours** and **OT Hours** for the contact.
   a. To save time, if deployment is more than 1 day, we recommend adding a range of dates.
      i. Adding range of dates (Sept 1 - Sept 5) creates an time/activity record for each day.
      ii. To save time, add in the most common daily hours worked below. Edits to actual hours worked can be made to individual days later in the process.
   b. Demobilization date must be after the Mobilization date, mobilization and demobilization dates/times must be in the past, and future dates will trigger an error message.
   c. Information entered must match documentation provided for verification purposes.

4. Click **Next**.

5. A new window appears allowing you to edit hours worked on individual days. Scroll over to view the hours submitted for each day.
6. To adjust hours, click the pencil icon (right side of #) for the corresponding day and category (regular hours and overtime hours). The field box will open enabling edits. Update the hours for that day/category. Click outside the box to enter the information.
   a. Edited fields will turn yellow.
   b. Hours Worked column is locked and cannot be edited.

7. Need to modify multiple records with the same information? Select the box next to any record that needs to be modified with the same information.
   a. Scroll over to view Regular Hours and OT Hours.

8. Click the pencil icon (right side of #) for one of the records to modify in either regular hours and overtime hours column.
   a. Type in the correct hours worked
   b. Select Update 2 selected items box
   c. Click Apply.
9. Record will be updated to reflect changes. Repeat this step for any similar changes that are needed.

<table>
<thead>
<tr>
<th>End Date/Time</th>
<th>Hours Worked</th>
<th>Regular Hours</th>
<th>Overtime Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/7/2023, 02:20 PM</td>
<td>24.00</td>
<td>8.00</td>
<td>4.00</td>
</tr>
<tr>
<td>10/8/2023, 02:20 PM</td>
<td>24.00</td>
<td>8.00</td>
<td>4.00</td>
</tr>
</tbody>
</table>

10. Once all time/activity records reflect your documentation, click Save.

11. Verify modifications made to time/activity records are reflected on the personnel tab and totals reflect documentation (main contact line).

12. Repeat the above steps of adding time/activity records for all contacts (original and backfill) listed on the claim.
   a. Ensure information added for each contact reflects documentation for validation purposes.

**Edit Activity Records**

1. To edit Time/Activity Logs, click the down arrow (right hand) of the record that needs updating.
2. Select **Edit Time/Activity Records**.

3. A new window will appear that allows you to edit the time/activity records associated with the contact selected. Scroll over to view the hours submitted for each day.

4. To adjust hours, click the **pencil icon** (right side of #) for the corresponding day and category (regular hours and overtime hours). The field box will open enabling edits. Update the hours for that day/category. Click outside the box to enter the information.
   a. Edited fields will turn yellow.
   b. Hours Worked column is locked and cannot be edited.

5. **Need to modify multiple records with the same information?** Select the **box** next to any record that needs to be modified with the same information.
   a. Scroll over to view Regular Hours and OT Hours.
6. Click the pencil icon (right side of #) for one of the records to modify in either regular hours and overtime hours column.
   a. Type in the correct hours worked
   b. Select Update 2 selected items box
   c. Click Apply.

7. Record will be updated to reflect changes. Repeat this step for any similar changes that are needed.

8. Once all time/activity records reflect your documentation, click Save.

9. Verify modifications made to time/activity records are reflected on the personnel tab and totals reflect documentation.

10. Repeat the above steps of adding time/activity records for all contacts (original and backfill) listed on the claim. Ensure information added for each contact reflects documentation for validation purposes.
Verification of Personnel Costs

1. Verify all personnel Time/Activity Records are final and reflect your documentation.
2. Once accurate (total reflect time worked), click the Update button.

Travel

View and Update Meal, Lodging, & Vehicle Costs

1. Click the Travel tab to view the expense outlined for this category.
2. Review the contacts listed to ensure accuracy. Edits can be made by clicking the down arrow (right side). Options include: Add Backfill, Add Time/Activity Logs, Edit Time/Activity Logs, Add Files, View, Delete

Edit Meals & Lodging, and Vehicle Costs

Travel estimates are pre-populated to the Claim record from the approved RSA/Cost Estimate.

a. Meals: Outlines meal expenses (per diem) for each contact
b. Lodging: on the RSA, lodging estimates are a general estimate and not associated with any particular personnel, but rather estimated as a lump # of nights. On the claim, the Agency will need to manually reconcile lodging to personnel.

c. Vehicle: Agency can claim miles and rate in the Miles and Rate columns. On the contacts record, update Personal Vehicle Miles and Personal Vehicle Rate with appropriate value.
1. On the **Travel** tab, click the down arrow (left side by contact name) to view daily time/activity records.

2. To edit Meal/Lodging/Vehicle costs, click the down arrow (right hand) of the main contact record (top line).

3. From the menu, select **Edit Time/Activity Records**.

4. A new window will appear that allows you to edit daily travel costs associated with the contact selected. Scroll to edit: **Meals, Incidental, Lodging, Personal Vehicle Miles, Personal Vehicle Rate**.

5. To adjust a field, click the pencil icon (right side of #) for the corresponding day and column.
   a. The field box will open enabling edits.
   b. Update the field.
   c. Click outside the box to enter the information.
   d. Edited fields will turn yellow.
6. Edit **daily** travel related expenses for the contact to reflect your documentation.
   a. Repeat the above step for any field that needs to be updated.
   b. **Reminder:** Agency will need to manually reconcile lodging to personnel.

7. **Need to modify multiple records with the same information?**
   a. Select the **box** next to any record that needs to be modified with the same information.
   b. Click the pencil icon (right side of #) for one of the records that needs to be modified.
   c. Type in the **correct amount**
   d. Select **Update X selected items** box
   e. Click **Apply**.

8. Confirm amounts have been updated. Once all travel time/activity records reflect your documentation, click **Next**.

9. Verify modifications made to fields are reflected on the travel tab and totals reflect documentation.
Add Meals for Backfill Contacts Added to Claim Record

1. Follow the above outlined steps to add Meals & Lodging, and Vehicle Costs to backfill contacts. Click the **Add Time/Activity Records** (vs Edit Time/Activity) tab to add costs to the contact.

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**Equipment**

1. Click the **Equipment** tab to view costs pre-populated from RSA/Cost Estimate to your Claim Record.
   a. Click the down arrow (by contact name) to view/edit daily activity records.
   b. Top line serves as the aggregate record for the piece of equipment and where all costs will be shown.

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Date</th>
<th>Equipment FE...</th>
<th>Name of Opera...</th>
<th>Equipment Use...</th>
<th>Equipment Use...</th>
<th>Equipment Rate</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweeper, Pavem...</td>
<td>8157</td>
<td>Hours</td>
<td>7</td>
<td></td>
<td></td>
<td>$85.20</td>
<td>$1,928.00</td>
</tr>
<tr>
<td>Sep 12, 2023</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sep 11, 2023</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. To edit Time/Activity Record, click the down arrow (right side) on the line where equipment is listed.

3. Select **Edit Time/Activity Records** from the menu.

4. A pop-up window will appear. To update a field, click the pencil icon (right side of #).
   a. The field box will open enabling edits.
   b. Update the field.
   c. Click outside the box to enter the information.
   d. Edited fields will turn yellow.
5. **Need to modify multiple records with the same information?**
   a. Select the **box** next to any record that needs to be modified with the same information.
   b. Click the pencil icon (right side of #) for one of the records that needs to be modified.
   c. Type in the **correct amount**
   d. Select **Update X selected items** box
   e. Click **Apply**.

![Image of Edit Time/Activity Records for Sweeper, Pavement to 110](image)

6. **Confirm amounts have been updated.** Once time/activity records reflect your documentation, click **Save**.

![Image of Edit Time/Activity Records for Sweeper, Pavement to 110](image)

7. **Verify modifications made to fields are reflected on the travel tab and totals reflect documentation.**

![Image of Rental tab with costs](image)

**Rental**
Include in this tab items that are not owned by the agency and needed to be rented (ie. car, equipment).
1. Click the Rental tab to view costs pre-populated from RSA/Cost Estimate to your Claim Record.
2. To edit the item, click the down arrow and select **View** from the menu.
3. The Claim Line Item page will appear. On this page, you can edit fields to provide the final information and costs, along with upload any required documentation.

4. To edit a field, click pencil icon (right side of field) to edit/add information.
   b. Edit desired field(s).
   c. Click Save.

5. To upload documentation, click Upload Files button.
   a. Select files from your computer.
   b. Click Open.
   c. Once file has upload completely, click Done.

6. Confirm file has been added to record.

7. Click the back arrow of your browser to return to Claims Record.

8. On the Claims Record, click the Rental tab to confirm edits are reflected on Claim Record.
1. Click the **Materials & Other** tab to view costs pre-populated from RSA/Cost Estimate to your Claim Record.

2. To edit the item, click the down arrow (right side) and select **View** from the menu.

3. The Claim Line Item page will appear. On this page, you can **edit fields to provide the final information and costs**, along with **upload any required documentation**.
4. To edit a field, click pencil icon (right side of field) to edit/add information.
   b. Edit desired field(s).
   c. Click Save.

5. To upload documentation, click Upload Files button.
   a. Select files from your computer.
   b. Click Open.
   c. Once file has upload completely, click Done.

6. Confirm file has been added to record.

7. Click the back arrow of your browser to return to Claims Record.
8. On the Claims Record, click the Materials and Other tab to confirm edits are reflected on Claim Record.

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**Review & Sign a Claim**

**Review Claim Amount**

1. Once all edits are made to the claim package, click on the Summary tab to review the full claim in one place.
2. While on the Summary tab, verify the costs listed reflect your expected reimbursement amount.
   a. Review the amount listed in the Total Claims Cost field. This should reflect your expected reimbursement amount
      i. This amount must be **equal to or lower** than your RSA estimate.
      ii. If the Claims amount is greater than your RSA/Cost Estimate, agency will need to amend their cost estimate. Follow the instructions provided in the Amend RSA section.
   b. Review aggregate cost amounts listed for each category
   c. If edits are needed, return to the tab where modification are needed to make the necessary changes to the claim package.

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**Sign Claim**

1. At bottom of Summary tab, enter in **Reimbursement Point of Contact**, the **Signed By** contact, and **Date**.
   a. The name provided is individual authorized to sign off on the claim.
      i. Reimbursement Point of Contact = person to contact with questions on claim
      ii. Signed By = person completing claim package
2. One can search for the Reimbursement Point of Contact and Signed By contact by typing their name into search bar and selecting from contacts in listing.
3. Type in **Date**.
4. Once contacts are added, click **Save**.
5. Confirm contacts have been added to the Summary tab.

Documentation Guidance
Approved documentation (see list below) must be attached to your claim record. Attach each of these documents in your claim package.
- FROC Daily Activity Logs
- Agency timesheets for all deployed and backfill personnel
- Payroll records for all deployed and backfill personnel
- Receipts and proof of payment for materials, commodities, rentals, travel related expenses (per diem, hotel, gas/fuel, mileage)

Upload Supporting Documentation to Claim Package

Upload Files
1. To upload documentation to the claim package, click the Related tab.

2. Click the Add Files tab to upload any documentation for this claim package.

3. Select the files from your computer to add and click the Add button.

4. Files that have been uploaded and are attached to the claim package, will appear under the Files section.
Scenario: Submit a Claim

1. After reviewing and updating all applicable fields, the Financial Point of Contact presses **Submit for Approval** on the upper right-hand corner of the claim record.

![Claim Record Image]

2. A dialog box outlining the Claim amount is presented. FPOC should verify amounts listed match the desired claim amount. Once confirmed, click **Submit**.
   a. Once claim is submitted, no edits can be made.

![Submit for Approval Dialog Box]

3. A confirmation box will appear. Click **Finish**.

![Finish Confirmation]

By submitting the above report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3750 and 1801-1812).
**FDEM Review**

1. This Claim is submitted to FDEM, and goes through an internal process for approval.
2. Claim will now appear in the submitted column on the main Claims page for the agency.
3. Claim will be rejected, Financial Point of Contact will receive a **Request for Information** from FDEM with justification and instructions for next steps.
4. Once the claim is approved, the Financial Point of Contact will receive a notification via email and can initiate the reimbursement process.
5. Claims will be moved to the Invoice tab once it is in the payment validation stage.

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**Support Available**

**DEMES Support Resources**

For more information and to stay informed of project updates, please visit the DEMES [website](#). Site contains support resources, including support contacts, FAQs, videos, and additional job aids.

- For **Mutual Aid** support, email the FDEM Statewide Mutual Aid Coordinator, Chasity Brown at [Chasity.Brown@em.myflorida.com](mailto:Chasity.Brown@em.myflorida.com).
- **Technical Support** can be requested by emailing [DEMES.Support@em.myflorida.com](mailto:DEMES.Support@em.myflorida.com).

**Feedback**

Your feedback and input is important to the success of this initiative. Please share your feedback and ideas for enhancement at [DEMES.Support@em.myflorida.com](mailto:DEMES.Support@em.myflorida.com).