



DEMES Mutual Aid Process Job Aid Update Agency & Contacts Information

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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.

What are we trying to accomplish?

Drive efficiency, accuracy and speed

By digitizing manual processes, eliminating paper forms, integrating systems and providing a centralized platform with accurate production data

Improvements to current functionality

By refining current workflows, clarifying fields and requirements, and eliminating system challenges that create duplications or allow for errors

Improve user experience

By improving the user interface, providing clearer instructions and pre-populating fields, when possible, to facilitate navigation and accurate workflow completion



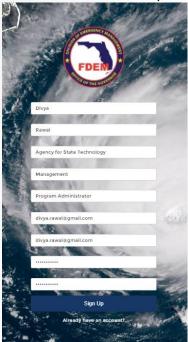
Scenario: Register for DEMES

Introduction

The purpose of this section is to provide users instructions on how to access and register for DEMES. DEMES (Department of Emergency Management Enterprise Solution) provides access to the Grants Management, Mutual Aid, and State Agency Cost Reporting portal. Registering establishes a contact within DEMES attached to the assisting agency indicated during the process.

Register for DEMES

- 1. To access DEMES, visit Register (fdemportal.com).
- 2. On the register page, **Enter** in your personal details in the fields provided.
 - a. Fields include: First Name, Last Name, Agency (i.e. Agency for Health Care Administration),
 Division, Role, Email, Username (auto populates when you click on it if your email is filled out),
 Create Password, Confirm Password

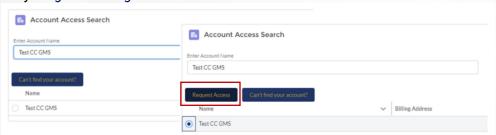


- 3. Click Sign Up to submit your request.
- Next, you will need to search for your entity's account. This will allow you to see the subrecipient
 agreements your entity has with FDEM. Type your entity's name in the Account Name box and hit
 enter.

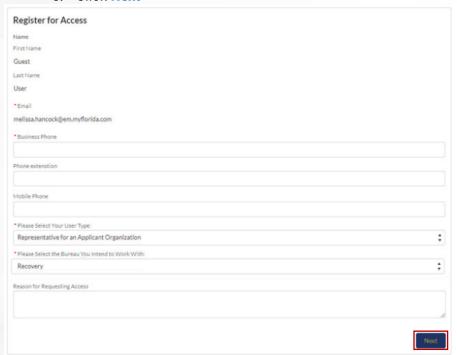




5. A list of accounts that match your query will appear on the screen below the search box. **Select** the appropriate account and click the **Request Access** button. *Can't find your entity's account, reach out to your grant manager for assistance.*



- 6. Once you have selected an account the final registration page will appear.
 - a. Type in your Business phone (required field), extension, and mobile phone
 - b. Select your User Type
 - c. Select the **Bureau** you intend to work with: selection does not limit which Bureau you can work with
 - d. Provide reason for requesting access
 - e. Click Next



- 7. A pop-up confirming the creation of your request will appear. Click Finish to submit.
- 8. Once submitted, your contact information is sent to FDEM for approval. You will receive email communication from FDEM about access to your organization's account once it is reviewed and approved.
- 9. If you do not see the Mutual Aid tab or icon box when you log into the landing page of DEMES, please reach out to Chasity Brown at Chasity.Brown@em.myflorida.com and request the Mutual Aid Portal be added to your account.



Scenario: Log In to DEMES

Access Mutual Aid Portal

- 1. Once a Financial Point of Contact logs in, <u>Login (fdemportal.com)</u>, 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.

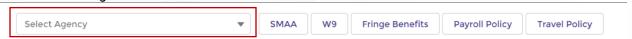
Scenario: Viewing and Updating Agency Documents in Mutual Aid Portal

As required, agencies will be requested to upload their W9 Form, Fringe Benefits, Payroll Policy, Travel Policy. Items only need to be uploaded once, until a new file is needed (expired, updated, etc.). Items to note:

- a. Boxes marked blue = missing documentation. Boxes marked green = documentation uploaded.
- b. Agencies can upload more than one document to each category. Each document must be uploaded separately (i.e one at a time no batch uploads).
- c. Files uploaded are associated with the agency and will appear for any contact associated with that agency.

Upload Agency Documents

- 1. Verify your current agency is listed in the box.
 - a. If not listed, click the box, enter in your agency name, and select your agency name from the listing.



- 2. To upload a document, click any of the boxes to populate the Upload Files tab.
- 3. Click the desired tab: SMAA, W9 Form, Fringe Benefits, Payroll Policy, Travel Policy
- 4. Click the **Upload File** button.



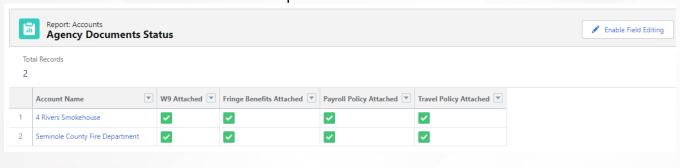
- 5. Select the file from your computer.
- 6. Click **Done**, once the file has uploaded completely.
- 7. Verify the box of uploaded document has turned green.



View Status of Agency Documents

The Assisting Agency must have all of their key documents uploaded onto the Mutual Aid Portal (SMAA, W9, Fringe Benefits, Payroll Policy, Travel Policy). To validate those documents are uploaded, the FPOC can scroll to the bottom of the Mutual Aid Portal dashboard and view the Agency Document Status.

Green check box means it has been uploaded.



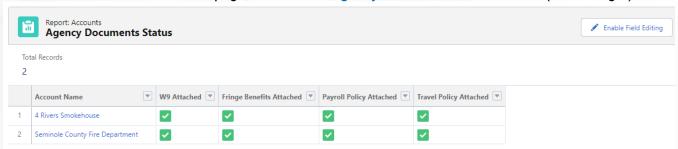
Scenario: View Your Agency Information

Locate Agency Record

- 1. Log into the DEMES Grant Management site via this link: Login (fdemportal.com).
- 2. Select the Mutual Aid tab in the header bar.



3. On the Mutual Aid dashboard page, scroll to the Agency Document Status section (bottom right).

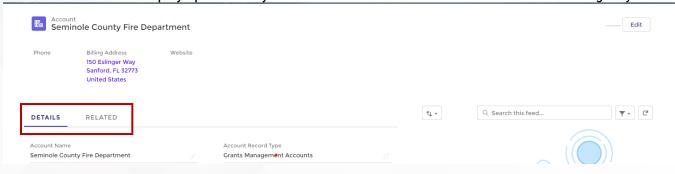




- 4. Select your agency name (blue link) in the Account Name column.
 - a. In most cases, only one agency will be listed on your dashboard. If you are a member of multiple agencies, each agency will be listed here.



- 5. Your agency page will appear. Two tabs are displayed that contain key agency information.
 - a. Details = displays general agency information: contact info, location, etc
 - b. Related = displays past history of DEMES activities and contacts associated with agency



6. Click on either the **Details** tab or **Related** Tab to view your agency information.

Edit Your Agency Information

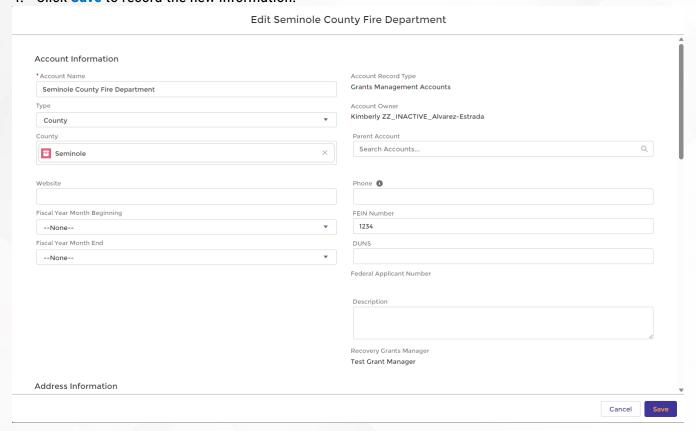
1. To edit your agency information, verify you are on the **Details** tab of your agency record and click the **Edit** button in the top right.



2. A new window will appear granting you the ability to add and update your agency information.



- 3. Review the enclosed information and make any desired changes.
 - a. Categories include: Account Information, Address Information, Fringe Benefits, & Documentation
 - b. Adding information on this page will not override existing records for any contact.
- 4. Click Save to record the new information.



View Agency Activities in DEMES

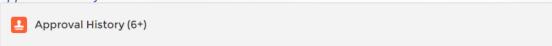
1. To view your agency activities in DEMES, verify you are on the Related tab of your agency record.





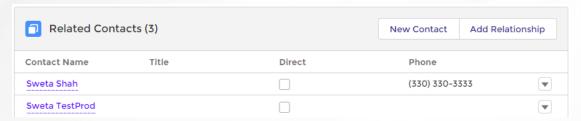
- 2. On this page you can view the following for your Agency: Approval History, Agency Related Contacts, Uploaded Files, Activity History, and Resource Support Agreements.
- 3. Double click into any blue link on this page to obtain additional information or access that item.

Approval History



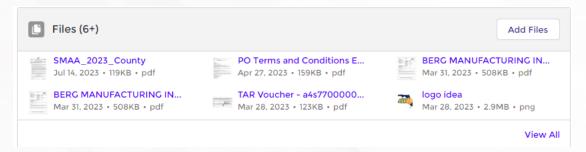
Related Contacts

Lists all contacts that are associated with your agency.



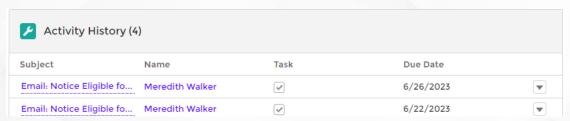
Uploaded Files

Inventory of all files uploaded that are associated with your agency.



Activity History

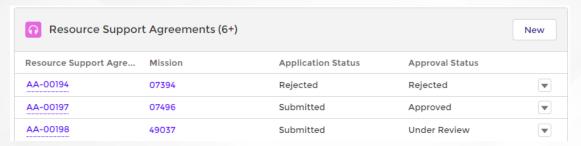
Inventory of approvals and communications associated with your agency.





Resource Support Agreements (RSA)

Inventory of RSAs associated with your agency.

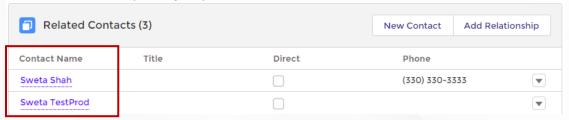


Update a Contact's Information Associated with your Agency

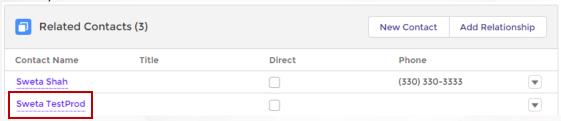
1. From your agency page, click on the Related tab. See pg4 for instructions.



2. On the Related tab, scroll down to the **Related Contacts** section. Contacts listed in this section are associated with your agency.

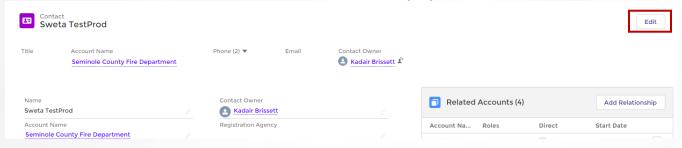


3. To update a contact's information associated with your agency, click the **name of the contact** (blue link).

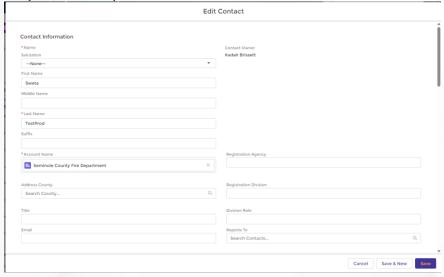




- 4. This will bring you to the contacts record within DEMES where you can view/edit the following. Scroll down to view all categories.
 - a. Contact Information: Name, Title, Email/Phone, Agency role
 - b. Adress Information: Mailing Address
 - c. Rates: Employee Number, Salary Rate, OT Hourly Rate, Fringe Rate, OT Fringe Rate
- 5. To edit a contacts information, click the Edit button in the top right.



6. A new window will appear allowing you to update the contact's info. Scroll down until you find the item you need to update. Click **Save** to record edits.



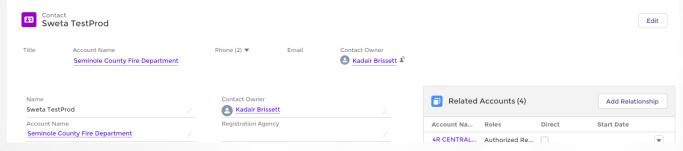
7. Verify information updated has been reflected on the Contacts Record. You may need to refresh the page to verify edits have been made.



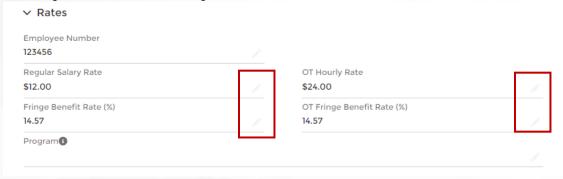
Add/Update an Agency Associated Contact's Rates

Follow steps outlined on page 8-9 to access the Contact's record associated with your agency.

1. Once on the contacts record, scroll down to the rates section of the page.



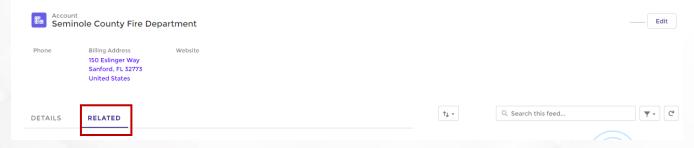
2. At the rates section, click the pencil icon to edit/add any of the following: Salary Rate, OT Hourly Rate, Fringe Benefit Rate, OT Fringe Rate for this individual.



3. A new window will appear. Update your desire field(s), then click Save.

Add a New Contact to your Agency

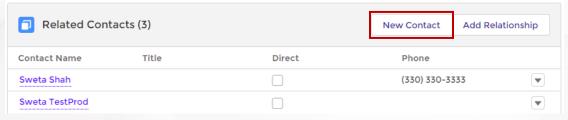
1. From your agency page, click on the Related tab. See pg4 for instructions.



- 2. On the Related tab, scroll down to the Related Contacts section.
 - Contacts listed in this section are associated with your agency.



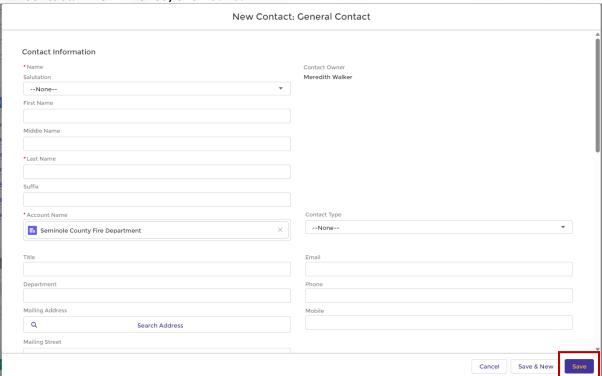
3. To add a new contact to your agency, click the New Contact button.



4. A new window will appear. Select General Contact, then click Next.



5. A second new window will appear. Enter in the required field, and any other critical information for the contact. When finished, click **Save**.

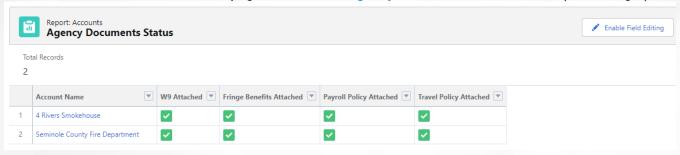


6. Confirm individual has been added to your contact listing in the Related Contacts section.

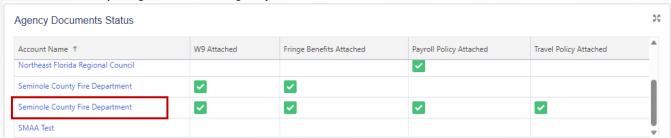


Update SMAA Roles in DEMES

1. From the Mutual Aid dashboard page, scroll to the Agency Document Status section (bottom right).

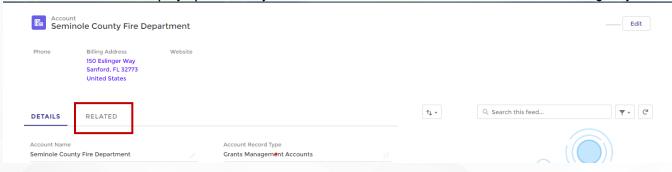


- 2. Select your agency name (blue link) in the Account Name column.
 - a. In most cases, only one agency will be listed on your dashboard. If you are a member of multiple agencies, each agency will be listed here.

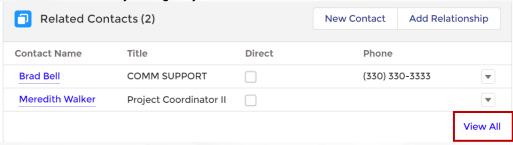


3. Your agency page will appear. Select the Related tab.

a. Related = displays past history of DEMES activities and contacts associated with agency

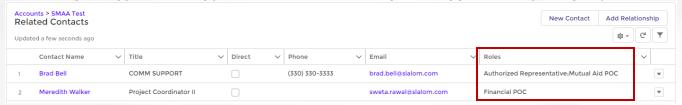


4. Scroll down to the **Related Contacts** section and click **View All** (bottom right) to view all contacts and roles related to your agency.

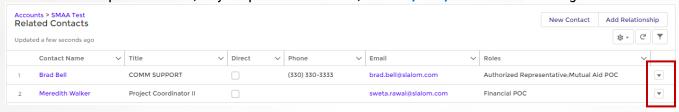




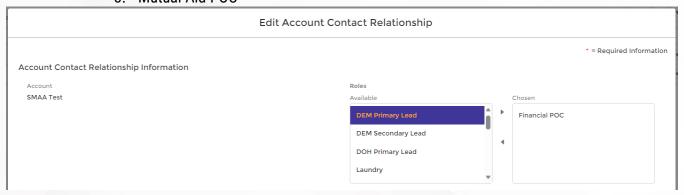
5. A listing will appear showing your contacts and their assigned role(s) related to your agency.



6. Click the drop-down arrow, of your preferred contact, to View, Edit, or Remove an assigned role.

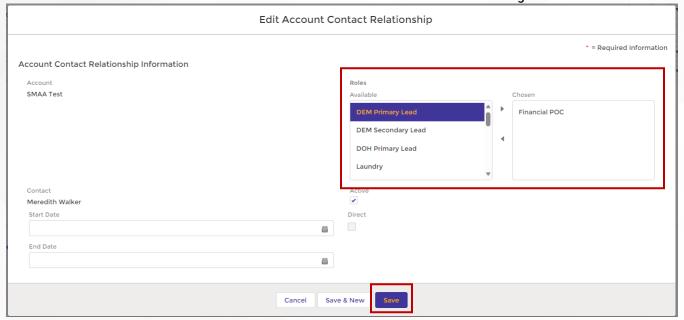


- 7. A new window will appear allowing you to add or remove roles from the contact selected.
 - a. Multiple roles can be added for each contact.
 - b. SMAA required roles for your agency in DEMES include
 - 1. Authorized User
 - 2. Financial POC
 - 3. Mutual Aid POC

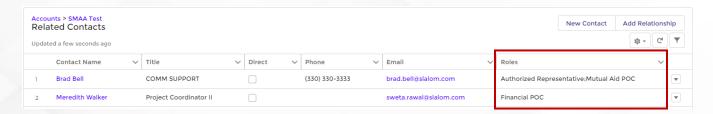




- 8. To edit a role...
 - a. Add a role to a contact
 - 1. **Select** the desired Role from the Available listing (left side)
 - 2. Click the Top Arrow Button to add the role to the contact
 - 3. Confirm new role name has been added to the Chosen listing
 - b. Remove a role from a contact
 - 1. Select the desired Role from the Chosen listing (right side)
 - 2. Click the Bottom Arrow Button to remove the role from the contact
 - 3. Confirm role name has been removed from the Chosen listing



- 9. Once your edits are made, click Save to record your edits.
- 10. Your Related Contacts page for your agency will appear. Confirm your edit are reflective.





Support Available

DEMES Support Resources

For more information and to stay informed of project updates, please visit the DEMES <u>website</u>. 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.
- Technical Support can be requested by emailing 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.