(X County) (Organization Name)

Kansas System for the Early Registration of Volunteers (K-SERV)
X County Local Administrator
Standard Operating Procedures

PUPROSE: To provide the Local Administrator with guidance in the event that volunteers have been requested or are needed to respond to an incident. The document also gives guidance on utilizing the Kansas System for the Early Registration of Volunteers (K-SERV) to search, deploy and track volunteers.

CONTENTS: This Standard Operating Procedures (SOP) document is divided into several sections, each discussing different topics related to the Local Administrator. The sections and attachments are as follows:

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I.   IDENTIFICATION OF A LOCAL ADMINISTRATOR

1.   Each local volunteer organization should identify one primary Local Administrator and at least two back-up contacts.

Local Administrator	Back-up Contact 1	Back-up Contact 2
Name Phone 1 Phone 2 Cell Other	Name Phone 1 Phone 2 Cell Other	Name Phone 1 Phone 2 Cell Other

Local Administrators should have limited administration rights on K-SERV (if this is not the case, please contact the State Volunteer Coordinator). Due to the sensitive and private information of K-SERV registrants, each Local Administrator must sign a confidentiality agreement before gaining access to K-SERV. (*Please see **Attachment A: Confidentiality Agreement***). This agreement should be returned to the State Volunteer Coordinator by fax or mail to be kept on file.

State Volunteer Coordinator	Back-up Contact 1	Back-up Contact 2
Stephen Tierce 785-291-3713 (phone) 1000 SW Jackson, Ste 330; Topeka, KS 66612-1365 785-296-2625 (fax) stierce@kdheks.gov	Nancy Akin 785-296-3180 *Same* *Same* nakin@kdheks.gov	

2. Each local volunteer organization should also be aware of other local volunteer organizations outside their own and maintain their contact information, as these organizations will also have their own identified Local Administrator and back-up contacts.

Volunteer Organization	Local Administrator	Back-up Contact 1	Back-up Contact 2
Name	Name Phone1 Phone2 Cell Other	Name Phone 1 Phone 2 Cell Other	Name Phone 1 Phone 2 Cell Other
Name	Name Phone 1 Phone 2 Cell Other	Name Phone 1 Phone 2 Cell Other	Name Phone 1 Phone 2 Cell Other
Etc.			

II. CREATING AND EDIT GROUPS WITHIN K-SERV

1. Groups of users can be created in K-SERV and then alerted using the Kansas Health Alert Network (KS-HAN). It is the responsibility of the Local Administrator to create a group and keep its members updated. The main benefit of this is that all groups created in K-SERV are pre-populated in KS-HAN, so the Local Administrator has the option of altering just a particular group within the county.

    There could be an occasion when a new group will need to be created or deleted. When creating a new group, the group name should be indicative of those contacts it includes.

    How to create groups:
    a. Go to the K-SERV website: https://kshealth.kdhe.state.ks.us/VolunteerRegistry/
    b. Sign on using your username and password.
    c. Click on the "Administration" tab.
    d. Click on "Create New Group" link.
    e. Enter a Group Name.
    f. Enter a short description of the group, this is not required.
    g. Click on the "Create" button.
    h. You will be directed to click "Finish"

    How to add members:
    a. Click on the "Edit Groups" link on the left-side of the screen.
    b. Use the drop down menu to find and select your group.
    c. A group of "Available Users" will be loaded onto the screen.
    d. Scroll through "Available Users" to find appropriate members you wish to have added to the group.
    e. Highlight the member you wish to move down to your group.
    f. Click the "Down" arrow. This will move the member to "Current Members".
    g. If you wish to remove a member, you would highlight their name and then click the "Up" arrow.

    How to delete or edit groups:
    a. Click on the "Edit Groups" link on the left-side of the screen.
    b. Use the drop down menu to find and select your group.
    c. To delete group, click "Delete".

d. To edit information, simply click in the text box you wish to edit.

III. REQUEST FOR LOCAL VOLUNTEER RESOURCES

1. Most health organizations have been advised to go through their Local Emergency Operations Center (LEOC) to request volunteers. The LEOC should maintain local volunteer organization contact information in their Emergency Operations Plan (EOP). If the LEOC receives a request for volunteers, the Local Administrator will be contacted by the LEOC and provided with a "Volunteer Request Form," or the information contained therein (a copy of the request form can be found in **Attachment B**). This is the minimum information needed to request and deploy volunteers.

   OR

   If the Local Administrator has not received a request from the LEOC, but believes the affected area could use volunteer assistance, s/he should contact the LEOC (per the contact information below) to get information on any volunteer requests they may have received. The LEOC can provide a filled-out Volunteer Request Form if they have already received a request for volunteers. It is recommended that the LEOC approve all volunteer requests, as this will aid in both the tracking of deployed volunteers and in completing any paperwork submitted afterward on disaster-related activities.

(X County) **Local Emergency Operations Center (LEOC)**	
Location (Address):	
Local Contact Person:	
Phone Number(s):	
Fax Number:	

   OR

   If the Local Administrator directly receives a request for volunteers from an affected entity (not the LEOC), please fill out the Volunteer Request Form with the appropriate information. This information, as well as a copy of the Volunteer Request Form, should be provided to the LEOC, where an authority will be able to approve the request for volunteers. Again, it is highly recommended that all volunteer requests be approved by the LEOC to ensure coordination and tracking of volunteers.

IV. COMPILING A LIST OF AVAILABLE VOLUNTEERS *(to be done by the Local Administrator)*

1. Create an excel spreadsheet containing a list of currently available (un-deployed volunteers). This can be obtained through K-SERV using the following steps:
   a. Go to the K-SERV website: https://kshealth.kdhe.state.ks.us/VolunteerRegistry/
   b. Sign on using your username and password.
   c. Click on the "Reports" tab on the top right-hand side of the screen.
   d. Click on the "Users" Report Query link.
   e. Select from the drop down menu "Users Reports".
   f. Click on the "Run Report" link.
   g. A list of (undeployed) volunteers will appear, with an option to export in Excel or PDF format. Choose the "Save" icon and a drop down menu will allow you export.
   h. A window will open asking if you would like to open or save the file. Click "Save."

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i.   Select the location on the computer where you would like to save the document, note the name and location of the file, and hit "save."

j.   Open the file. Once open, you will want to sort the volunteers from your county. This would entail that you would need to delete outside volunteers from the Excel sheet.

k.   Add columns to the Excel document. Added columns should include the following, at a minimum:

    i.   Time contacted

    ii.   Able to respond? (Y/N)

    iii. When the person can deploy

    iv.   How long the person can deploy

    v.   Other comments/information

2.   Next, you will create a KS-HAN alert to notify the volunteers from X COUNTY. There are two ways to alert volunteers: by organization and by group. Alerting by organization will alert all registered K-SERV volunteers in your county. Alerting by group will send to your specific group only, if you have created and maintained the group in K-SERV.

a.   Go to the KS-HAN website: https://kshealth.kdhe.state.ks.us/HealthAlertNetwork/

b.   Sign on using your username and password (same as K-SERV)

c.   To send an alert, you will need to click on the "Notification" tab in the upper, right-hand corner of the page.

d.   The links to create a notification are located on the left hand side of the screen

e.   Click on "Create Alert"

f.   Create a title for the message. The title should be brief, but descriptive.

g.   Next, enter a message. The message should include information about the situation, along with the request for volunteers. It is important to include:

    i.   Who the volunteer needs to contact to indicate they are available to respond *(this should be the Local Administrator)*

    ii.   All information obtained from the LEOC with the Volunteer Request Form.

    iii. Details of what would be expected of the volunteers during the deployment.

h.   Next, you will enter the notification criteria.

    i.   Sensitive

    ii.   Jurisdiction

    iii. Delivery Time

    iv.   Severity

    v.   Callout Status

i.   You have the option to add an attachment to the alert

j.   ***Alerting all K-SERV volunteers in your county***: You have the ability to select the organization you would specifically want to target in addition to the county you would want to target. You can select multiple organizations or counties by holding down the "Control" button when making selections.

k.   ***Alerting your specific group of volunteers***: If you created a group, choosing recipients is as easy as selecting "Both" for the Recipient Type and then finding your group in the Ad-Hoc Group listing. You also have the ability of adding additional filters to the group that will narrow down the parameters of the alert. You have the ability to narrow the target audience of the alert by Role, Expertise, Organization Type, or County.

l.   Next, select the method of communication. There is no default, but most often the alert is sent by email. You can select more than one option.

m.   After selecting the type of mode of communication, that mode will show up in one of two boxes. The box on the left will indicate the type of communication that has been selected.

> i. Highlight the mode(s) and use the arrows (between the boxes) to move it to the box on the right. The top mode on the list will be sent first, followed by the second, third, etc.
> ii. Select the number of attempts.

n. Answer the following question: Do you want to include notification descriptors? The default setting is checked – "Include". When this box is checked the notification will include the details that go along with the message (i.e., when the alert was sent, who created it, etc).

o. Answer the following question: Would you like to require an acknowledgement from the recipient? The default setting is checked – "Acknowledgement Required."

p. The last item to fill out on the form is the type of message you are sending. There are four different options – Alert, Update, Error, and Cancel.

q. Select "Create Alert". Note, this may take some time to generate

r. A receipt page will pop up to allow you to proof read the notification. If you need to edit the message, select "Edit". Once the notification is ready, select "Send Alert".

s. A confirmation page will appear. Select "View Report," a PDF file of the message will be generated. Save the document under "Admin Workarea" tab and select "Alerts, Advisories & Updates." The purpose of this step to allow any level of user to view all alerts at a later date.

3. Once volunteers indicate to you (Local Administrator) they are able to respond, use the Excel sheet *(from Step 1)* to compile a list of volunteers who will be responding to the incident and submit this list to the COUNTY LEOC. The list should detail the following, at minimum:
   a. Name
   b. What type of work they can do
   c. When they will arrive at the receiving location
   d. How long they currently plan to stay on-site
   e. Any <u>verified</u> licensure information, as applicable

V. RECORDING VOLUNTEER ACTIVITY IN K-SERV *(to be done by the Local Administrator)*

1. Log in to K-SERV and look for the incident to which you are responding. To view incidents, click on "Administration" at the top right of the screen, then on "Volunteer Incidents" at the left side of the screen. A list of active and inactive volunteer incidents will appear in the main window.
   a. If you see the current incident listed, skip to step #3 in this section.
   b. If you do <u>not</u> see the current incident listed, continue to step #2 in this section.

2. If the incident is not listed, you will need to create the incident. To create an incident in K-SERV, complete the following steps:
   a. After logging in to K-SERV, click on "Administration" (top right of screen) and then on "Volunteer Incidents" (left side of screen). A list of active and inactive volunteer incidents appears in the main screen.
   b. Scroll to the bottom of this list in the main screen and click on the button that reads "Add."
   c. Fill out the information on the screen that appears. You may need to work with COUNTY LEOC contact to fill out some of the information, such as the official incident name, incident coordinator, description of damage, etc. If something is incorrect on this screen, it can be edited later. The most important thing is to get a good description of the incident to which volunteers are being deployed so that they can be tracked.

d. Mark the "active status" box at the bottom of the form and then click the "Update" button. You have now created an incident and will be taken back to the list of active and inactive incidents.

3. Once an incident has been created in K-SERV, or if one already exists, find the incident in the list of volunteer incidents. When you find the incident, click the "More" link at the far right of the incident line.

4. You will be taken to a summary of the incident. Scroll to the bottom of this screen and click the button that reads "Deploy Volunteer."

5. You will be redirected to a search screen. Select the criteria that are appropriate to find the volunteers that will be deploying.

6. Go down the list and for each person who will be deploying to the incident, click the "Select" link at the left of their name. The person will now appear as deployed to the incident.

7. To undeploy a volunteer who is leaving, follow steps 1-4 above, but instead of clicking "Deploy Volunteers," immediately scroll to the bottom where you will see a list of deployed volunteers. Find the name of the person(s) you wish to undeploy and click "Undeploy" to the left of their name.

8. Confirm at regular intervals with the volunteer receiving location (as indicated in the Volunteer Request Form) to track which volunteers arrived on the scene, which have left, etc. and update information in K-SERV.

9. Provide regular updates to the LEOC on the numbers of deployed/undeployed volunteers.

VI. REQUESTING ADDITIONAL (NON-LOCAL) VOLUNTEER RESOURCES *(to be done by the Local Administrator)*

1. Once it has been determined that X COUNTY's volunteer resources will be insufficient to cover the event, volunteer resources can be requested from other regions in the state.

2. Notify X COUNTY LEOC of the need for additional volunteer resources and send them a copy of the State Volunteer Request Form (*please see **Attachment B***) by fax, email or other communication method.

3. The LEOC will compile State Volunteer Request Forms and send an official request to the State.

4. Continue to monitor your local volunteers, providing regular updates on K-SERV and to the LEOC.

5. You will be contacted by the State Volunteer Coordinator regarding the availability of additional volunteers.

VII. PROCEDURES WHEN CONTACTED TO PROVIDE ADDITIONAL (NON-LOCAL) VOLUNTEER RESOURCES *(to be done by the Local Administrator)*

1. It is possible that you could receive a request from the State Volunteer Coordinator to activate volunteers in response to an event outside the community. This can happen when a local

community's own volunteer resources are insufficient or have been exhausted (*at which point they would follow the steps outlined in Section VI, above*).

2. When contacted in these situations, the State Volunteer Coordinator will provide you, as the Local Volunteer Coordinator, with a situational briefing and a copy of a Volunteer Request Form.

3. At this point, follow the steps in Sections IV and V, above, with the exception that communications and updates should be directed to the SEOC (specifically the State Volunteer Coordinator) rather than the affected LEOC.

4. When there is a list of available volunteers, provide that list to the SEOC, who will in turn provide the list of available volunteers to the requesting county.

State of Kansas
Kansas Department of Health and Environment
Bureau of Community Health Systems

Kansas System for the Early Registration of Volunteers (K-SERV)
Administrative Confidentiality Agreement

I understand that credential and background information including the names of individuals and their respective licenses and other information reported to the Kansas System for the Early Registration of Volunteers (K-SERV) is confidential information. I agree that I will not reveal such confidential information, regardless of how or where acquired, to family members, friends, professional colleagues, other employees, volunteers, or any person unless such person has been authorized to have access to that information.

I also understand that K-SERV is to be used only for the purpose of the activation of volunteers for planned exercises and real life disasters.

I further understand this agreement shall be in force during any period of authorized access to K-SERV records and even after my authorized status has been terminated and that unauthorized use or disclosure of any confidential information is a breach of the terms of privileged access granted by the Bureau of Community Health Systems (BCHS) K-SERV program and my administrative access to K-SERV will be revoked.

I have read and understand the above information.

Name:_____
            (Please Print)

Signature:_____   Date:_____

Received by:_____   Date:_____
            (Please Print)

Signature:_____

For State Use

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ATTACHMENT B: VOLUNTEER REQUEST FORM

STATE OF KANSAS • VOLUNTEER REQUEST FORM

Form Completed By:			Date:		Time:	

Requesting Entity/ Location Information	Contact Person(s):	
	Agency/ Facility Name:	
	Address:	
	Phone Number(s):	
	Other Contact Information:	

LEOC person/authority approving request	Name:		County:	
	Phone Number(s):			

Relevant Information about Incident	Location:	
	On-Site Check-in:	
	Description:	

Mission Assignment:	

Information on Numbers and Types of Volunteers Requested

Skill/Occupation Type/Specialty Requested (Type of work volunteers will be doing)	Number Requested
TOTAL NUMBER OF VOLUNTEERS REQUESTED:	

Anticipated Date(s) of Service:	

Volunteer Logistical and Basic Needs Information	Lodging:	
	Transportation:	
	Meals:	
	Hygiene/Toiletries:	
	Environmental/Health Protections:	
	Other:	

For Local Administrator Use Only

Time Form Received_____ Time Volunteer List Provided to LEOC_____

Volunteer Coordinator Signature_____ Date_____
Updated July 2014

Attachment C: Updating Profiles and License Information

I.   **LANGUAGE FOR SENDING ALERT TO UPDATE PROFILES AND LICENSURE INFORMATION**
   a. It is encouraged to send an alert quarterly or annually – as you see fit – to prompt K-SERV users to update their profiles and licensure information. This will ensure accurate information is being collected and stored in the K-SERV database.

Dear K-SERV Volunteer,

Thank you for your participation in K-SERV (Kansas System for the Early Registration of Volunteers). As a reminder, K-SERV is a secure registration system and database. Registration on K-SERV does not obligate volunteers to serve during a disaster. If an event requiring volunteer assistance occurs, appropriate public health officials will use K-SERV to generate a list of potential volunteers based on information provided during registration.

To assure accurate information, please login to K-SERV and update your profile and/or licensure information: https://kshealth.kdhe.state.ks.us/VolunteerRegistry .

If your password has expired, please contact *<KSERV LOCAL ADMINISTRATOR NAME AND INFORMATION>* or the K-SERV State Administrator at kservadmin@kdheks.gov.

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   b. To send this type of an alert, you will need to switch over to the Health Alert Network (Part IV, Section 2)
   c. To send an alert, you will need to click on the "Notification" tab in the upper, right-hand corner of the page.
   d. The links to create a notification are located on the left hand side of the screen
   e. Click on "Create Alert"
   f. Create a title for the message. For example "Update Profile and Licensure Information"
   g. Next, enter the message.
   h. ***Alerting all K-SERV volunteers in your county***: You have the ability to select the organization you would specifically want to target in addition to the county you would want to target. You can select multiple organizations or counties by holding down the "Control" button when making selections. ***It is important for "Recipient Type" to select "Volunteer Registry"***
   i. For more steps on how to fill out a HAN Alert, please refer back to Part IV, Section 2 of the Local Administrator SOP.