

Access and Concepts

Using The Network



Section 1

Guidelines & Security

1.1 “The Network” Concept

CAN is a Network of people, information and tools to help communities recover. This “Network” includes the Web-based tools as well as:

- Communities collaborating on client records to better serve the client’s needs;
- Agencies planning community-wide training events;
- Service Providers coordinating activities in conjunction with long term recovery groups; or
- Agencies managing resources in the Resource Directory to better align services with client needs.

The “Network” also refers to the capacity of resources working together—including agencies, recovery groups and the Red Cross. This unique collaborative approach also includes:

- A standardized formset on the Client Registry to simplify training and reporting
- Client data standards to more effectively import client data collected in the field or during intake
- Resource data standards and practices to scale resources across impacted regions

1.2 Access to Client Data

CAN is a tool for collaboration, it is not intended to serve as an agency’s system of record.

- Access to client data in CAN is granted solely for the purpose of disaster recovery case management.
- Users may not view or alter records for any client they are not providing case management or other related services.
- Unauthorized use will result in the immediate suspension of that user’s access.

1.3 Point of Contact Roles and Responsibilities

Each agency must designate one Point of Contact (POC) to provide essential duties to support its activities in CAN. This position is key to the success of an agency to facilitate collaborative disaster recovery in CAN. Specifically, the POC is responsible for:

- Notifying agency users of CAN activities such as the User Group Call, meetings, trainings, enhancements/updates, system maintenance and monthly updates.
- Authorizing all agency users designated to receive CAN access including co-signing and reviewing Confidentiality Agreements for each user as well as helping the users complete the online.
- Notifying CAN immediately to deactivate user accounts to ensure the confidentiality and integrity of client data.
- Participating in monthly User Group Call (second Thursday of each month at 3pm EST)
- Oversee case transfers and assignment of clients to the agency's caseload.
- Coordinating participation in training for all agency staff. Make sure users understand how to access the training and the importance of the training to successfully using CAN.
- Designating at least one agency users to understand and compile case management reports.
- Managing an agency's resources in the Resource Database or assigning that duty as appropriate.

1.4 System Security

Agencies and case managers are responsible for maintaining the security of the system and the data in client records.

The following security measures should be practiced by all users:

- Do not share your password with supervisors, colleagues or CAN staff.
- Secure your username and password.
- Do not store username and password (auto complete) in your Web browser.
- Password-protect the screensaver to prevent unauthorized access to your computer.

- Logout and close all screens when tasks are complete or if you are leaving the area where you have sight of your computer.
- Do not share data displayed on a screen, printed, or exported out of the system with non-users of CAN without prior consent of the client.
- Follow your agency's policies for accessing and securing client data and files.

1.5 Supported Browsers and Devices

While CAN continues to support a broad range of older browsers, users will enjoy increased security and performance by updating to recent versions of whichever browser you use. The following browsers are recommended:

- Internet Explorer 8.x (Windows XP, Vista and Windows 7)
- Internet Explorer 7.x (Windows XP, Vista and Windows 7)
- Firefox 3.x (Mac OS 10.4 and higher, Windows XP, Vista and Windows 7)

CAN Recovery Tools are not currently supported on Netscape, Opera, Safari, Chrome or Internet Explorer 6.x Web browsers. Additionally, accessing any of the tools from an iPad, iPhone or other mobile devices is not supported.

Section 2

Rights & Access

User accounts may be configured for client access, resource-only access or Construction Portal access. This is determined foremost by the access level granted to an agency, then to the type of access user requests during registration.

2.1 Access to Client Data

Access to data in the Client Registry is granted solely to users to provide case management services, perform updates to client records as well as document the case management process. The Participating Agency must be approved for client access before any of its users are granted access.

2.2 Access to Resource Data

Access to data in the Resource Directory is granted to create and edit community resources for all registered users. Additionally, Resource-Only access is available to those agencies which do not qualify for client access.

- ❗ Export access to their resource data is reserved to trained users with specific rights.

2.3 Public Access to Resource Data

There is a public search feature for the Resource Database which is available to locate and view some information in the Service Profiles. There are controls in the Resource Database which prevent resources from appearing in public searches.

2.4 Access to the Construction Portal

Any POC from a Participating Agency may indicate staff as Construction Supervisors and authorize access to the Construction Portal. A Confidentiality Agreement must be completed with the “Construction Supervisor” check box selected with no Regional Portal selected. Construction Supervisors are assigned to rebuild projects by either the Assigned Case Manager or through self-assignment.

A user with Client Access has access to all of the data and functionality which is offered through the Construction Portal.

Section 3

User Accounts

3.1 Creating A New User Account

Once an agency has completed the participation process and it is approved, users are then eligible to register for accounts. The agency Point of Contact (POC) should work with its staff to register users for technical training. Here are the basic steps:



Before registering for a user account the Confidentiality Agreement must be completed, signed and faxed to 866-810-4526. Please work with the agency's POC to complete this form.

Create a user account. Follow all onscreen instructions and select Register when complete. If your agency is not listed under Affiliated Agency on the New User Registration form, please confirm with your POC that the Participation Packet was approved.

Verify e-mail address. A verification link will be e-mailed when the account is created.

Wait for user account activation e-mail. Typically, this process takes 2-3 days.

Register for technology training. (This can be done at anytime and is independent of any approval process.)

-  **Note:** accounts are activated within three business days of CAN receiving **both** the online registration **and** faxed Confidentiality Agreement. User accounts are not processed until an agency's Participation Agreement is approved (for new agencies only).
-  Do not create a second new user account if the process does not complete properly.

3.2 Log in to CAN

Once a user account is activated an e-mail is sent by the system administrator. Users may then log in following these steps:

1. Go to **www.can.org** and navigate to **MyTools** [upper right]
2. Enter Username (or E-mail Address) and Password and select **Login**
3. The **User Agreement** will display; acknowledge the **Terms of Service** to proceed to **MyTools**.


4. Use the **Jump to** dropdown box to navigate to the appropriate Regional Portal.
- ① Never store passwords in the Web browser when prompted to do so.
 - ① Please submit an online Support Request <http://help.can.org> if the account is not activated within 3 business days.

Section 4

Managing Your User Profile

The User Profile allows users to manage account information:

- Password (including reset)
- Security Question (and answer)
- E-mail Address (including updates)
- Username

 Users are not able to change the Affiliated Agency. New user accounts should be created whenever a user changes agency affiliation.


4.1 Passwords


Users self-select a password when an account is created. The system requirements for creating a password:

- must be at least eight characters long;
- must contain at least one upper, one lower and one numeric character;
- must contain at least one special character. (eg. -, +, !, &, #, \$, or ?); and
- cannot contain spaces.

To change a password, select the **Reset Password** button at the bottom of the User Profile when logged in.

If users are unable to login, password resets are available when a login fails or from the **Registration, Login, and Password Help** link on the left-hand menu of most **CAN Recovery Tools** pages. This feature allows users to change it at anytime without contacting Technical Support.

 Users must know the answer to their **Security Question** to complete the password reset process.

 Passwords are not e-mailed to users. Please take a moment and write down the selected password once the account is created.

4.2 Understanding The 'Security Question'

The **Security Question** protects account access by storing the answer to a pre-selected question. Selecting a **Security Question** and answer is done when the account is created and may be changed at any time.

1. **Login** and navigate to the **User Profile** [top menu].

2. Scroll to the bottom of the screen to the **Security Information** area.
3. Select **Reset Security Question** and follow onscreen instructions.

Paid Staff/Volunteer:

Do you want access to the client database, resource database, or both?
(Please note that some access requires additional training):

Who is your Agency Point of Contact?:

Point of Contact Phone Number and E-Mail address:

Security Information

Reset Password:

Reset Security Question: ← select one

Resend Verification Email:

- i** Write down the answer to the Security Question. You will need the answer to this question if you ever forget your password.

4.3 How to Update an Email Address

Users may update their email address quickly from the User Profile:

1. Login to CAN and navigate to **User Profile** menu item at top of most pages.
2. Scroll down to the Email field and enter the new email address. [Be certain to type correctly.]
3. Select **Update**.
4. Prior to logging out of CAN, click on the email verification link sent to the new address within 48 hours before it expires.

NOTE: If the verification email is not received for any reason, please confirm it was entered correctly in the User Profile before logging out.

Users will receive an onscreen message (see below) that the email address must be verified before accessing CAN. This verification process is initiated the first time a user logs in with a non-verified e-mail address. Users who do not receive the verification email must contact the Help Desk in order to have the email resent.



Users who are unable to reset an email address, please work with your agency's POC to submit a Support Request. All requests for email changes must be authorized by the POC.

4.4 What is a “Non-Unique” E-mail Address?


All user accounts must use a unique email address which is not associated with another account. Users are encouraged to use their agency's e-mail address as opposed to a free e-mail account such as Google or Hotmail.

4.5 Keep User Account Information Updated

Contact information, including e-mail address and phone number, must be kept current to assist other participants communicate should the need arise.

To access your **User Profile**:

1. After logging in, select **User Profile** on the top horizontal menu on most CAN Recovery Tools pages.
2. When the form loads, update and correct all form fields. Required fields are marked with an asterisk.
3. Select **Update** (bottom of page) to save changes. A confirmation message will display with successful changes marked in green.
 - Missing required fields or form errors will be highlighted in red. Follow the onscreen instructions to make any needed corrections.
 - Confirmation of your updates highlighted in green (top of page.)

 Users should notify CAN when they leave or change agencies by using the Support Request Form.

Section 5

Submitting a Support Request

Use the online form to submit a Support Request to resolve technical issues:

- Activating user account (after 3 business days)
- Problems logging in
- Reporting an error with the tools

5.1 The Support Request Form

To use the Support Request form:

1. Visit <http://help.can.org> and select **Submit a Ticket**
2. Complete the required fields
3. Select appropriate **Category** from dropdown and enter a descriptive **Subject**.
4. Include as much information describing the problems and steps you took to encounter the issue if appropriate.
5. Select **Submit** at bottom of form

The screenshot shows the 'Submit a Ticket' page on the CAN Help Desk. The page header includes the CAN logo, the tagline 'A Network of People, Information and Tools to Help Communities Recover', and navigation links for 'Answers: Training | Support | FAQs'. A search bar and a 'Log out' button are also present. The main navigation bar has tabs for 'Start Here', 'Submit a Ticket', 'Your Tickets', 'Knowledge Base', and 'User Profile'. The 'Submit a Ticket' section is active, displaying the title 'CAN Support Request' and instructions: 'Please complete this form to submit a technical support request. If you have another issue such as agency registration (info@can.org) or questions about registering for training (training@can.org), please use those email addresses for the quickest response.' Below the instructions are links for 'User Profile Updates', 'Registration, Login and Password Help', and 'Merge Requests'. The form fields include 'The customer's email' (with a 'Select user from list' link), 'The customer's name', and 'Category' (a dropdown menu with the text 'Please select the category'). To the right, there are two sections of 'Knowledgebase' articles: 'Latest Articles' and 'Most Read', each with a list of links to various help topics.

Section 6

Understanding MyTools and Regional Portals

6.1 Working With MyTools

Think of MyTools as your “desktop” when using CAN. It keeps track of the Regional Portals and lists the Associated Disasters in that portal.

- 1. Client Management**
Quick access to existing client records, links to establishing new client records, client export features (additional training required) and lets you manage your FastTrack Service Lists.
- 2. Resource Management**
Search existing resources, update existing agencies or programs or create new agencies or programs. Quickly run Resource Exports (additional training required).
- 3. Associated Disasters**
Associated Disasters work in connection with the Regional Portals to filter client data—providing another security layer to client records. This section is located at the bottom of the page.
- 4. System Updates**
Important information on changes to the tools or access to the Network.

My Tools

CAN Region II

canregion2.comunityos.org Jump to: CAN Region II

1 Client Management

- Client Search/New Clients
- Case Load Reports
- Client Export
- Manage FastTrack Service Lists

2 Resource Management

- Search Resources
- Update Existing Agency
- Update Existing Program
- Update Existing Service
- Create New Agency
- Create New Program
- Create New Service
- Resource Exports

3 Associated Disasters:

- NJ Floods (03/2010)
- NJ Hurricane Irene (08/2011)
- NJ Severe Storms and Flooding (08/2011)
- NJ Storms (06/2012)
- NY 2009 Disasters
- NY Hurricane Irene (08/2011)
- PR 2009 Disasters
- PR Hurricane Irene (08/2011)
- PRVI Tropical Storm Isaac (08/2012)

4 System Updates

Site Maintenance

From 10:00 pm to 11:00 pm EST each Wednesday CAN Recovery Tools may be unavailable for site maintenance. Please submit a [Support Request](#) to report any issue with accessing CAN.

Supported Browsers

While CAN continues to support a broad range of older browsers, users will enjoy increased security and performance by updating to recent versions of whichever browser you use. The following browsers are recommended:

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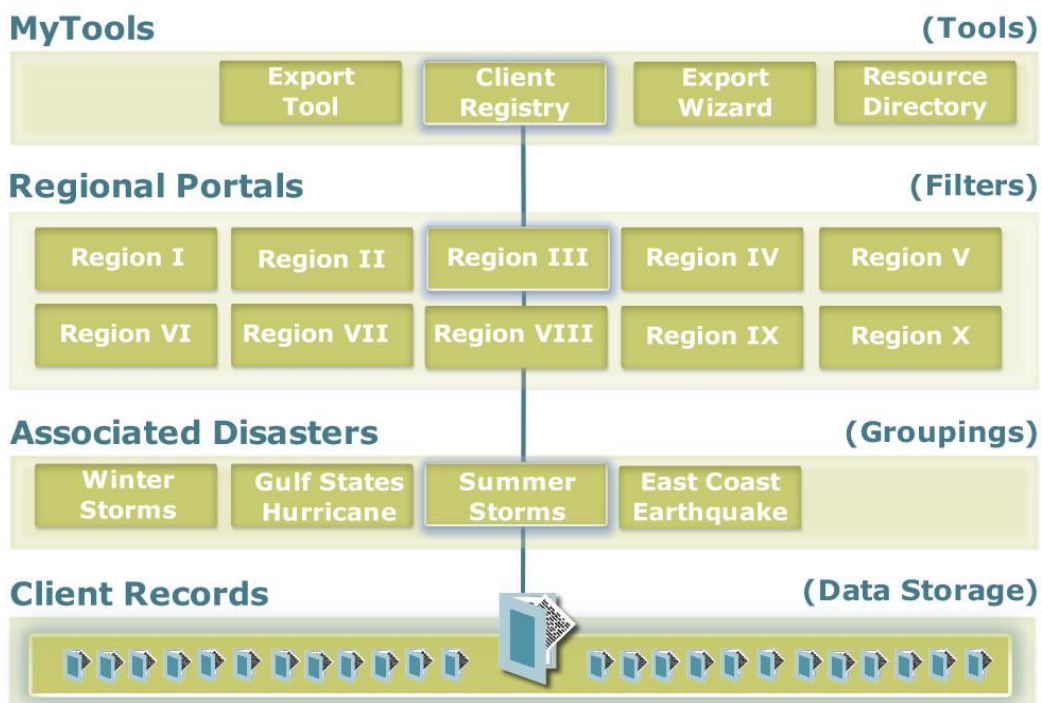
6.2 How Regional Portals Work

Client data is stored in one central database but access is controlled through a network of 10 Regional Portals aligned with the FEMA Regions. The main concept to think about is *access* rather than *process*.

Regional Portals simply manage access to client data in a network of 10 portals—reducing the unrelated data returned during client searches and data exports. By limiting the data by regions it increases the speed of searches and exports enhancing client confidentiality. Typically, case managers have access to one Regional Portal; however some users could have access to more than one Regional Portal.

Associated Disasters group related client records by events to simplify searches and report building. Clients impacted by multiple events may have more than one Associated Disaster, but typically there is only one event per client record.

The client records are stored in a single database so these three mechanisms manage access to the most relevant data. The graphic below shows how MyTools provides access to the tools, the Regional Portals filter clients in geographic areas, and the Associated Disasters group clients.



6.3 How is Regional Portal Access Granted?

Users are granted default access to a single Regional Portal based on the state listed in their User Profile. If access is required for additional Regional Portals, the POC should submit a Support Request describing the case managing activity.

6.4 What is the Construction Portal?

The Construction Portal helps case managers coordinate repair/rebuild projects with Construction Supervisors through a designated portal containing only construction-related fields.

The Construction Supervisor accesses this portal which mirrors the Repair/Rebuild tab of the Client Registry as well as includes fields needed to identify the client. The portal allows users to search for existing clients and record progress on assigned construction projects.

Case Managers continue to access client repair and rebuild records from the expanded Repair/Rebuild tab of the Client Registry and enjoy the benefits of more detailed project management information, estimates and permit data collection.

Since the new repair/repair fields are part of the Client Registry any user with Export Wizard access may include this information in an export.

The Construction Portal also includes:

- Fields which are mirrored from the Repair/Rebuild tab of the Client Registry
- Limited or no access to case management and private client information
- Search interface to locate and assign construction projects
- Automation to trigger emails to the Assigned Case Manager and Construction Supervisor as the rebuild project status changes
- Reporting tools

Enhancements of the Repair/Rebuild tab of the Client Registry were funded through the generous support of the United Methodist Committee on Relief (UMCOR).

Section 7

Using the Knowledge Base

Visit <http://help.can.org> for an array of answers on how to use CAN. The Knowledge Base is a simple tool which is designed to help provide information quickly in searchable database. The questions are organized into the following categories:

- **User Accounts:** Learn how to create a new account, reset a password, update email addresses, or understand more about Regional Portals.
- **Managing Client Data:** Learn more about submitting Merge Requests, recording Services Provided, using Associated Disasters, designating Head of Households or attaching electronic files to a client record.
- **Agency Access:** Everything from the basics of completing a Participation Packet to the role of a POC.
- **Managing Resource Data:** Find out more about how resource data is structured or how to use the new Disaster Category.
- **Training:** Learn how to register for training, discover other kinds of training information, and find out how to use the Training Sandbox.
- **Other:** Articles which don't fit into any of the above categories. Look here if you still haven't found what you're looking for.

CAN
COORDINATED
ASSISTANCE
NETWORK

A Network of People, Information and Tools
to Help Communities Recover

Answers: [Training](#) | [Support](#) | [FAQs](#)

Search...

Help Desk

Start Here | Submit a Ticket | Your Tickets | Knowledge Base | User Profile

... type in your search keywords here

[Submit Ticket](#)
Need help? Just submit a ticket using this link and our staff members will take care of your issue.

[View Tickets](#)
Access and manage your current tickets. In order to view them, you will have to be logged in.

[Search Tickets](#)
Search through your own tickets. In order to perform the search, you will have to be logged in.