The Resource Directory

Maintaining Community Resources
Section 1:
About the Resource Database

The Resource Database brings together community-identified resources in a shared, searchable database which is integrated with the Client Registry. Since this single database is used to describe all resources, it is searchable, reportable and actionable throughout the preparedness, response and recovery phases of a disaster.

This Web-based tool is available year-round for use by all members of the recovery community:

- Case management agencies
- Red Cross chapters
- State and local VOADs
- Federal and state partners
- Faith-based partners

However, this data is not maintained by any single agency or group, it is ‘crowdsourced’ by each community. Resource information is, therefore, as current and accurate as it users’ time and dedication allows. This promotes stewardship of this database within the community—increasing the accuracy of the data when large-scale events impact a community and resources are in constant flux. With all of the CAN tools, it is up to each community to find their best use.

1.1 Integration with Client Data

This data is used in CAN by case managers to identify and document Referrals and Services Provided directly on the client record. This client data integration creates a mechanism to not only track and monitor how a community is being served, it can also tell compelling stories for how agencies are working together to meet client needs. Since this data is a shared collection of community resources it allows for reporting across all events to identify how clients were served.

1.2 Building Partnerships

The Resource Database plays a unique role as a partnership tool allowing agencies to work together to extend the capacity of the community. Maintaining current Agency and Service Profiles provides several benefits to communities no matter how they are using the Client Registry.
Collaborating on resource data facilitates natural partnerships at the community-level that, when managed and maintained properly, scale up regionally when impacted areas transcend local boundaries. This shared tool allows all agencies to generate a snapshot of community resources and perform gap analysis to identify unmet services and support for vulnerable populations.

It also allows data exports of these resources into a text file or spreadsheet which then could be accessed as a “go-to” directory [everything from blankets to furniture banks to case management agencies] in the initial planning stages of a community’s response or recovery efforts.

### 1.3 The Role of ‘Resource-Only’ Partners

In addition to Client Access to CAN, there is also ‘Resource-Only’ access which is open to a much broader group of disaster stakeholders. Federal, state and local agencies play a vital role in identifying community resources and adding those to CAN. These resource partners have no direct access to any client data or how the data was utilized in the Client Registry; however, generic information on how many time a profile was viewed by registered users or from the public Service Search may be accessed.

### 1.4 The Public Search

There is a public search feature which allows for a simple search of all active Service Profiles. It is recommended that resources be marked “Hide From Public” on the Service Profile to remove that information from the Public Search feature.

### 1.5 The Resource Directory and Regional Portals

The Resource Directory is separate from any Regional Portal so that users on any Regional Portal may be able to utilize and Agency, Program or Service Profile.
Section 2
Understanding Profile Types

The Resource Database utilizes three profiles types to describe agencies, programs or services. These profiles allow users to group, identify, organize and associate resources to suit a variety of scenarios. Information cascades from the Agency to the Program and, finally, the Service Profile to make it easier to update contact information or other common data shared across each profile type.

Agency Profile

The Agency Profile provides general information about the agency, its mission and contact details (such as phone number or street address). It also serves to organize resources by agency with unique controls to all users associated with that agency.

The Agency Profile should not be used to describe individual services. Instead, agencies should create Service Profiles for each distinct service offered. If an agency provides housing assistance in the form of temporary shelters, transitional housing, and housing subsidies, a Service Profile should be created for each of these different types of housing services as opposed to including those in the Agency Description.
If a particular resource is only available to a specific agency (i.e. preferred hotel rates) those should be marked as

**Program Profile**

The Program Profile provides a flexible means for organizing related resources to quickly update manage those underlying Service Profiles. Program Profiles could organize resources by:

- Geographic location of offices
- Lines of service
- Multiple locations
- Delivery channels
- Categories of need

**Service Profile**

The Service Profile provides specific information about the service offered by the agency including the service type, eligibility and procedures, how to obtain the service and contact methods.

A Service Profile contains information which case managers would need to identify services, determine client eligibility requirements, assist with in-take and evaluations, and other information needed to provide services. Most importantly, Services Profiles are what are ultimately available to case managers when documenting the client record.

### 2.1 How Profile Relationships “Cascade”

Each level of Resource Database profiles (Agency, Program or Service) is connected in a “top to bottom” relationship with information and settings cascade down from the Agency, to the Program, and then, finally, the Service Profile.

**Cascade Tool**

Because the Agency, Program and Service Profiles are connected, when key fields in the Agency Profile are updated, those changes may cascade down to the Program and Service Profiles. This reduces the time needed to update Service Profiles.

To ease the time an agency spends on data entry, the Cascade Tool was created so that repeating information (such as phone numbers) could be updated whenever they changed—without manually opening and changing each Service Profile.
The Cascade Tool appears on the confirmation page after saving an edit to a current Agency Profile. When an Agency Profile is edited, select **Save** and use the Cascade Tool to update the Program and Service Profiles linked to the agency.

**Section 3**

**Creating Profiles**

The Resource Database should reflect all community resources—not just those Participating Agencies who have access. While more agencies are joining CAN each year, the Participating Agencies still represent a small number of a community’s total resources. In fact, being the resource manager for your community may enable you to reach out to many resources and better inform case managers during the case management process.

**3.1 Best Practices: Adding Non-Participating Agency Data**

To add services from non-Participating Agencies to the Resource Database, an Agency and Program Profile must be created first. This partnering practice allows agencies to demonstrate value to community partners who may not otherwise need to participate in CAN.

While there are no rules on how resources from non-Participating Agencies are added, it should be viewed as a way to engage those agencies and provide information about CAN. It is always good practice to consider:

1. Is this a public resource, or should it be hidden from public searches?
2. If the agency received a referral would they understand how to update its information if capacity changes?
3. Is this resource an internal resource for your agency which an external agency fulfills? If so, be sure to hide it from other agencies.
4. When adding local for-profit stores which may offer invaluable donated goods for a specific disaster, define an end date to automatically hide it.
5. Does it makes sense to create an Agency Profile or is a Service Profile under your Agency Profile more appropriate?

All Participating Agencies have an Agency and Program Profile created using information provided on the Agency’s Participation Agreement. Any services
created for these agencies should be connected to the Agency and Program Profile.

### 3.2 Creating New Agency Profiles

Before adding a Service Profile a corresponding Agency Profile should be created. Here are some useful controls to help better manage this data.

**Profile Settings: Update Cycle**

The Update Cycle sends a reminder email to the email address in Update Contact field (typically the profile creator) to check the profile for any needed updates. This person requires Resource Database access to update the profile.

**Update Contact Information**

A contact name and email is required for the Update Cycle feature to work. To assist other users who may find errors in the profile, also include a contact phone and fax number in all Agency Profiles.

**Associated Disasters**

Agency and Service Profiles may be restricted to clients affected by a particular disaster to target these resources to the relevant or eligible recipients.

It is important to search the Resource Database for an agency before creating a new Agency Profile.

1. From MyTools, select **Update Existing Agency**.
2. Search for the Agency Name (use a partial name to widen search to allow for variations).
3. If a match is not found, select **Add An Agency**
4. Enter the Agency Profile information.
5. Define the Update settings.
6. Set Public Access Settings to Active.
7. Select Save Agency (bottom center page.)
8. Designate service area (Associated Disasters).

- Do not use the Web browser’s reload or back button; this will create a duplicate record.
- Year-round services should be designated as a National Resource.
- Do not enter more than the required fields on the Agency Profile page. Extra information on the Agency Profile page can create false hits for users searching the Resource Database.

Once a profile is saved, users may create another Agency Profile (select Add Another Agency) or close this window.

### 3.3 Agency Profile and User Accounts

The Agency Name from the Agency Profile is associated with an agency’s User Accounts—in addition to all other Resource Database information. For example, the name that appears on the Agency Profile will also appear as the agency name on all User Accounts.

The Agency ID may be located on the Agency Profile and will appear as a number with the letter ‘A’ at the beginning (e.g. A292383)
3.4 Creating New Program Profiles

After creating an Agency profile, a Program Profile must be associated with it before any Service Profiles may be created. A Program Profile is automatically created for CAN Participating Agencies.

Create a Program Profile

1. From MyTools, select Create New Program.

2. Enter the program name to appear on the profile. The program name should be the same as the agency name.

3. Select Next. A search results page with any matching agency profile(s) loads.

4. Select the correct Agency Profile by selecting the corresponding radio button and select Next Step (bottom center of page.)

5. Refer to the Agency Profile Quick Start Guide (end of this document) to enter program information that may vary from the agency information that cascaded from the agency profile.

6. Review the settings for the profile. (Settings are identical to Agency Profile settings.)

7. Select Save Program.
8. Either create another Program Profile (select Add Another Agency) or close this window.

⚠️ Do not use the Web browser’s reload or back button; this will create a duplicate record.

⚠️ Do not enter more than the required fields on the Program Profile page. Extra information on the program profile page can create false hits for users searching the Resource Database.
3.5 Using Program Profiles

Most agencies use a single generic Program Profile for all Service Profiles. However, agencies with multiple locations might use separate Program Profiles for each location. Alternatively, agencies with multiple lines of service or delivery channels might also establish a Program Profile for each (assuming contact information changes).

The following graphic illustrates how an agency with two locations could use different Program Profiles for each branch—so that the street address (and other contact information) cascades to the Service Profile.

3.6 Creating New Service Profiles

A Service Profile may only be created if there is a corresponding Agency and Program Profile. Please create Agency and Program Profiles before creating a Service Profile.
Add a Service Profile

1. From MyTools select Create New Service.
2. Create a Service Name for the profile and enter the Agency Name (A partial name may be used to broaden a search.); select Next Step.
3. Select the correct Agency Name radio button and select Next Step (bottom center of page).
4. Select the correct Program Name radio button and select Next Step (bottom center of page).
5. Complete the Service Profile.

Follow the Service Profile Quick Start Guide (at end of this guide) to enter matching Service Profile information.

Services which are suspended after funds are exhausted or the need is satisfied should be set as inactive. In the event of another disaster; the services can be updated quickly and set to active again.

The Service Profile confirmation page offers options for additional tasks.

- Close This Window
- Add Another Service (Profile)
- Add a Duplicate Service (Profile)
- Post Service

There must be a separate Service Profile for each resource made available in CAN. When adding multiple items that are all from the same service, use the Duplicate option directly after you Save (add) the profile to reduce data entry.

3.7 New Fields in the Service Profile

You should be very familiar with the form fields as they are also found in both the Service Profile Agency and Program Profiles. However, there are many new fields that are vital to accurately describing a service that are not part of the Agency or Program Profile.

- Hours of Operation
- Specific Hours
- Target Population
- Age Group
- Gender
- Income Notes
- Driver’s License
- Other
- Type of Fees
- Fee Amounts
- Various Accounting Fields
3.8 Editing and Duplicating to Add Additional Service Profiles

You may duplicate a current Service Profile to add a similar service to add an additional service to an agency.

Duplicating a Current Service

1. Return to MyTools; select Update Existing Service.
2. Enter search criteria to locate a current Service Profile to duplicate. Select Show Profiles button.
3. Select the linked title of the Service Profile to load that record.
4. Scroll to the bottom of the page and Select Save Service.
5. Select Duplicate Service Profile. A screen loads for the process of linking the new service.
6. Update the Service Profile name to match the new service to add. Select Next Step. Search results with any matching agency name loads.
7. Select the matching agency by selecting the corresponding radio button. Select Next Step. Search results with any available Program profile(s) loads.
8. Select the matching Program Profile by selecting the corresponding radio button. Select Next Step. The new service profile loads.
9. Update the information in the Service Profile to match the new service, and Select Save. The confirmation page loads.

3.9 Save Time by Duplicating Service Profiles

Additional Service Profiles may be added quickly to an Agency Profile by duplicating a Service Profile after it is created. The duplicate Service Profile may then be changed to match the new service.

Duplicating Service Profiles

When you save a Service Profile, there is an option to duplicate the Service profile.
1. Select **Duplicate Service Profile**.
2. Update the Service Profile name to match the new service to add. Select **Next Step**.
3. Select the matching Agency by selecting the corresponding radio button. Select **Next Step**.
4. Select the matching Program profile by selecting the corresponding radio button. Select **Next Step**.
5. Update the information in the Service Profile to match the new service, and Select **Save**. The confirmation page loads.

### 3.10 Guidance on Creating Service Profiles

Each type of service offered by an agency should have a corresponding Service Profile in the Resource Database. These Service Profiles should be specific and not describe multiple services in one profile.

**Example of Quality Service Profiles**

The Houston Area Burgundy Crescent Volunteers offer a variety of services for individuals who are disabled by a terminal disease. As part of their response to a local disaster, they have expanded their services to assist this population with disaster recovery needs. A representative describes their services as:

“Our organization offers individuals disabled by a terminal disease: in-home care and visitations; prepared meals; transportation to medical appointments, retail errands; and family/community events. We also assist individuals in obtaining free or reduced cost medical care. To assist individuals affected by the disaster, we are providing case management services; housing placement and referral service; household items (bedding, cookware, furniture; assistive devices) and hygiene supplies; and volunteer labor.

To properly document the services the agency is provided, create the following service profiles:

- **Service Profile 1**: In-home medical observation
- **Service Profile 2**: Prepared meals
- **Service Profile 3**: Non-emergent Transportation
- **Service Profile 5**: Case Management Services
- **Service Profile 6**: Bedding
Service Profile 7: Cookware
Service Profile 8: Furniture
Service Profile 9: Assistive devices
Service Profile 10: Hygiene Supplies

3.11 Naming Your Service Profiles

An important aspect of quality Service Profiles includes planning how your agencies organizes resource data, also think about how users will search for and, ultimately, use it. While ‘Bedding’ may be an adequate description for your agency, providing additional details may make it more meaningful in case management. Here are a few examples:

- Bedding (set of linens)
- Bedding for a family of 4
- Bedding (local referral)
- Bed Voucher
- Bedding or Linens
- Bedding (winter blankets)

As shown below, ‘Bed Voucher’ appears as a referral in the Client Registry without any information about which agency the voucher is associated with (if any). If this is a voucher from your agency it might make sense to add your agency ID so that a report could be run over time to capture how many referrals were made: Bed Voucher (A283737).

3.12 Using the ‘Disaster Resource’ Category

To provide a way to group and organize related resources, the “Disaster Category” was added to Service Profile template. Any single Disaster Category may be associated by selecting the appropriate option from the dropdown. This field does not impact any searches in the Client Registry for a Referral or Service Provided.
3.13 Generating Category-Specific Lists

One a community has organized and grouped types of related resources using the Disaster Category, any user will be able to export category-specific lists.

1. From the Export Service Records screen, select all of the data fields to be included
2. Enter the appropriate “Disaster Category” category
3. Select ‘Export’ to generate the report
Section 4
Update Agency, Program, and Service Profiles

4.1 Updating Profiles

When updating the Agency and Service Profiles for an Agency, start with the Agency Profile and then use the Cascade Tool to update any associated Program and Services Profiles. However, not all fields are included in the cascade function.

1. Go to MyTools; and select Update Existing Agency under Resource Management.
2. Enter search criteria to locate a current profile in the Resource Database to edit. Select Show Profiles. A search results page loads.
3. Select the Agency Name to view the profile.
4. Make changes as need; select Save. The confirmation page loads.

Never delete an Agency, Program or Service Profile; use the Case Status field and switch the profile from Active to Inactive. If a profile has been made Inactive it can be switched back to Active status at any time.

4.2 Using the Cascade Tool to Update Program and Service Profiles

The Cascade Tool assists data entry by copying information to the Program and Service Profiles connected to the Agency Profile. The following tool is only available when you have completed and saved an update to an Agency Profile.

2. Check next each field to update on the profile.
3. Select one of the following buttons:
   - **Update This Program/Service**: Updates the profile with the fields you have selected and loads the next program/service profile linked to the agency.
   - **Update All Program/Services**: Updates all program and services profiles with the fields you have selected.
**Skip This One:** Skips the current profile and loads the next program/service profile linked to the agency.

**Skip All:** Skips all program/service profiles without updating any information.

4. After all updates are complete, a confirmation page loads.

### 4.3 Update a Single Service Profile

This is the simplest option for updating a single service profile.

1. Go to MyTools; select **Update Existing Service** under Resource Management.

2. Enter search criteria to locate a current Profile in the Resource Database to edit. Select **Show Profiles**.

3. Select the name of the linked title of the profile’s name to load the profile.

4. Make changes as need to the profile. Scroll to the bottom of the page and select **Save**.
Section 5
Searching Agency, Program and Service Profiles

The Resource Database is searched using keywords. A keyword search will look for matching text in certain fields of the Agency, Program and Service Profiles and display matches. There are three ways to search the Resource Database:

1. Public Service Search
2. From MyTools to update existing data
3. From the client record (Referrals and Services Provided)

5.1 Searching Resources

2. Select Search Resources and type in key criteria such as Keyword and Location and selecting Search.
3. To view a resource, select the Service, Program or Agency name.

The indexed fields available to searches include:

- Keyword [search phrase]
5.2 Searching And Publishing Techniques

1. Select either Update Existing Agency, Update Existing Program or Update Existing Service under Resource Management.

2. Enter in the name or the Agency ID; enter a location (it is recommended to leave Associated Disaster blank when searching).

3. Select Show Profiles button to view search results.

When Searching for agencies with a common name (e.g., “Red Cross”), include location information to narrow your search. If you locate the Agency in the search results, record the Agency ID number and the Agency Name (as it appears in the search results) to complete the Service and Program Profiles.
5.3 Writing More Effective Service Profiles

Understanding how the Resource Database search engine works (and how it is indexed) helps agencies write better profiles. Because search results include Service, Agency and Profile Profiles, be mindful to write very specific Service Profiles and try to use more generic language in the Agency Profile.

For example, an agency providing multiple services to the elderly and disabled who need assistance to reside in their own homes might include words in the Agency Profile which will trigger extra search results for the case manager.

Read the following Agency Profile and think about how the search phase 'meals' would be searched.

“Agency Description: Provide a broad range of services to individuals needing assistance for independent living including meals on wheels.”

- **Service Profile #1 Description:** meals delivered to residents on a weekly basis.
- **Service Profile #2 Description:** Transportation to and from medical services.
- **Service Profile #3 Description:** In-home assistance.

Because the words “meals” appears in the Agency Profile, all three services will be included in the search results giving the case manager extra information to sort through in order to find the right information for the client.

When this occurs with multiple Agency Profiles, it can make it difficult for users to locate the service they need for their client.

If a keyword search matches text found in the Agency Profile, all the connected Service profiles will be included in the search results—even if those Service Profiles do not contain the keyword.
5.4 About “Non-Public” Fields

There are several administrative fields that will display to other registered users when editing Agency, Program or Service Profiles, but will not display to the public or Case Managers. These fields include:

- Staff Note
- Moderator's Note
- Edit Notes
- Create Date
- Last Update/Review Date
- Edit Date
- Data Source Code
- Update Cycle
- Annually, Biannually, Quarterly, Monthly, Weekly
- Update Contact Name
- Update Contact Email
- Update Contact Phone
- Update Contact Fax
- Status
- Start Display Date
- End Display Date
- Hide Director Information
Section 6
Community Resource Maps

The resource information in CAN is available to all members of the community. The Service Search allows for any public user to search Service Profile data quickly.

1. Select Resources menu at the top of most pages
2. Enter a search phrase and select Advanced Search

Including a Look Up Zip Code will narrow the map results to a single region and be easier to view resources located close together.

Service Search Results

Search results are displayed in a table by default, but search results may also be displayed graphically on a map.

1. From the initial Search Results page select View map of results.
2. Search results will appear on map as red pin points.

From the Search Results map, the zoom controls may be used to narrow your search and the Service Search

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Section 7
Managing Resources

There are settings in the profiles which allow a user to control how the resources are displayed to the public, other registered users and your agency users. These settings may be useful for controlling how and when a Service, Program or Agency Profile is viewed or utilized in case management.

7.1 ‘Active’ Versus ‘Inactive’

If a profile is set to ‘Inactive’, it will not be available for referrals or Services Provided or from the public search. Since the relationship between the Agency Profile and the Service Profiles are hierarchical, if you set the Agency profile as inactive, it will hide all Service profiles under the agency. This is useful mechanism to quickly deactivate all resources.

7.2 Hide From Other Agencies

Another mechanism for managing how an agency’s resources are viewed and used by other agencies is the Hide From Other Agencies checkbox. By selecting this checkbox this resource will only be available to case managers associated with that agency.

Many agencies use this checkbox for these types of resources:

- Case management services for an agency for reporting purposes
- Preferred rates for hotels or service providers
- Retailers where an agency has an in-kind agreement
- To better control high-demand resources
- Generic resource profiles used for agency-wide reporting

7.3 Sharing with the Public

On the top of most CAN Recovery pages there is a link to search for resources which may be used without logging into CAN. By default all Active profiles are public unless the Hide From Public Search in the Public Access sub-section is checked.

Public Access: Start Display Date

The Start Display Date sets the date a profile will be active in the Resource Database. Agency Profiles’ setting cascades to all related Service Profiles.
**Public Access: End Display Date**

The End Display Date allows you to set a date at which the Profile will no longer be visible. If this is set at the Agency profile level, the setting applies to all Service profiles connect to the Agency profile.

**Hide Director Information**

The Hide Director option allows you to omit the Director’s contact information provided on the profile from the listings seen when a user searches the Resource Database.

The cascading relationship with the Service Profile will cause any changes to the Agency Profile to apply to both the Program Profile and the Service Profile.
Section 8
The Export Tool

8.1 Resource Database Export Tool

The Resource Database Export Tool enables users to export data based on specific criteria.

1. To access the Resource Database Export Tool, login to My Tools and navigate to the appropriate Regional Portal.


3. From the Export Tools page, select Resource Database Export Tool.

4. Under Profile Databases there are 4 reports available: Agency Profiles, Program Profiles, Service Profile, or Resource Hierarchy.

5. Use the checkboxes (on the left) to include data fields in the export data file.

Export Agency Records

Below you will find a list of field names in the Agency database. Use the checkboxes on the left edge of this page to indicate which fields will be needed in the export data file. Fill in any search criteria in the other fields to indicate which records will be included.

For example, in the Registration database, if you mark the checkboxes for First Name, Last Name, and Usercode and leave all the other fields alone, the export data file will consist of the First Name, Last Name, and Usercode for every record in the database. If you were to add a search criteria for records where Status is ‘Active’, the export data file will consist of the First Name, Last Name, and Usercode for every “Active” record in the database.

- Export
- Preview
- □ Check/Un-Check All Fields

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<tr>
<th>General Information</th>
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<tr>
<td>Agency ID</td>
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<tr>
<td>Agency Name</td>
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<tr>
<td>Funded By</td>
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<tr>
<td>Affiliates</td>
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<tr>
<td>Hours of Operation</td>
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</tbody>
</table>

These exports include information contained in the Resource Database Profile; there is no client-specific data included in any of the generated reports.
6. Enter the criteria into the fields to indicate which records will be included in the export.

Any field may be used to generate the export, but does not need to be included in the export file. For example, using Location criteria to define the export does not require that the Location field appear in the export itself as a column.

In the example below, the Location of “National” is selected, but the box is not checked. In this example, the export will include National Agencies physically located in Mississippi (MS).

<table>
<thead>
<tr>
<th>Location</th>
<th>National</th>
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Only the “checked” boxes will have a column of information pulled in the export.

7. Select Preview or Export.
   Preview will take you to a sample page to review the information before compiling the export file to download. It will display up to twenty-five results that match your criteria.
   Export will immediately proceed to the final steps of compiling information. These records will then be pulled and compressed into a tab-delimited file for download. The Web browser should display a pop up window to save or open the file.

Use WinZip [PC] or Stuffit [Mac] to extract the compressed file, in order to open it in a spreadsheet program for manipulation.
Agency Export Data File

399 records matched your search criteria. Please wait while the export file is generated...

Your records have been exported and compressed into a tab-delimited file ready for download.

Download this export file to your computer: export.txt

OPTIONAL:

Save Report with the name: Agency

Saved Reports keep your criteria and field selections for future use. Please give the report a unique name.

8. On the results page, you also have the option to save the export. The Save Report option will allow you to name and save a report you need to pull on a regular basis.

Be sure to select a unique name for each report, the system will not allow you to save reports with the same name. These reports are only available to you and are not available to others in their Export Tool.

8.2 Data Provider Report Tool

The Data Provider Report Tools provides invaluable reporting data on Services Provided from data in the Resource Database. Reports are configured based on all or a specific Data Provider.

A Date Range may also be selected to refine reports by month or quarter.

There are four reports that are generated from this Tool:

Data Provider Summary
The number of profile views and referrals for the specified Data Provider and Date Range.

Profile Views Report
The number of profile views per agency for the specified Data Provider and Date Range.

Profile Referrals Report
The number of profile referrals per agency for the specified Data Provider and Date Range.
Referral Ethnicity Report
The number of clients, contacts, and referrals for each ethnicity type for the specified Data Provider and Date Range.

Profile Access Reports

Report Criteria

Select Data Provider: All Data Providers
Select Date Range: Aggregate

Select Report to Run

Data Provider Summary
number of profile views and referrals for the specified Data Provider and Date Range
Profile Views Report
number of profile views per agency for the specified Data Provider and Date Range
Profile Referrals Report
number of profile referrals per agency for the specified Data Provider and Date Range

A Select Report to Run radio button must be selected to generate a report or the report will not load.

Once the report is generated it will be displayed on screen and display three types of information:

- Data Provider
- Views
- Referrals
Profile Access Reports
Data Provider Summary

<table>
<thead>
<tr>
<th>Data Provider Summary for All Data Providers (Aggregate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Provider</td>
</tr>
<tr>
<td>2-1-1 Community Link</td>
</tr>
<tr>
<td>2-1-1 for Southeast Colorado</td>
</tr>
<tr>
<td>2-1-1 hotline Resource &amp; Referral</td>
</tr>
<tr>
<td>FEMA</td>
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<tr>
<td>First Call United Way 2-1-1</td>
</tr>
</tbody>
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Select **Main Menu** at the button at the bottom of the **Data Provider Summary** to generate another report.
Section 9
Resource Helper Tool

Managing large amounts of new community-based data has always been a challenge—especially during the response phase where adding resources from the field is critical. The Resource Helper Tool was designed to fill this gap by giving agencies the flux capacity to quickly import this data without the need to enter each one by hand or train staff on a new tool. This specially-formatted Excel spreadsheet provides a familiar workspace for many to quickly organize resources from all recovery stakeholders in the proper data formats without directly inputting data into the Web-based forms.

9.1 Using the Resource Helper Tool

Access to this import tool is limited to system operators, but the spreadsheet may be obtained which will enable registered users to:

- **Import** new Agency, Program and Service Profiles
- **Export** existing resources to share with other organizations

To obtain a copy of this blank spreadsheet, please contact technical support form the online Support Request Form found at:

- www.can.org/support

The spreadsheet may be updated and then returned to CAN to import the data into the Resource Database.

9.2 Avoiding Duplicate Service Profiles

While the Resource Helper Tool provides a powerful way to move large amounts of data into the Resource Database, it can also create unintended duplicate records. To minimize this, be sure to export all existing profiles before attempting to import new profiles.

The Resource Helper Tool was designed to manage profiles from your agency. Please work collaboratively with other agencies if profiles need to be updated for multiple agencies in your community.