DEM*ES* Job Aid:
Mutual Aid Portal Overview

Updated April 12, 2023

Table of Contents

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.

External Overview: Mutual Aid Portal

Key Features of the Mutual Aid Portal

The Mutual Aid Portal is the externally-facing Salesforce application that a Financial Point of Contact for an assisting agency will use as their source of truth to complete all of their tasks associated with missions, resource support agreements/cost estimates, and claims. The following section outlines the layout and navigation of the external Mutual Aid Portal, dashboard, and reports that a Financial Point of Contact will see. Though FDEM internal users will not interact directly with this Portal, this job aid is intended to provide a high-level overview of what assisting agencies will see and how they input information that is then ingested into the FDEM Mutual Aid Portal.

Mutual Aid Portal Walkthrough

The following is an overview of the Mutual Aid Portal dashboard with a visual and description of each of the tiles that an assisting agency's Financial Point of Contact or other designated user can view and navigate once they have logged in to the Mutual Aid Portal. Note that the Financial Point of Contact must already be registered as a Portal user.

The Mutual Aid Portal dashboard serves as a landing point for a Financial Point of Contact to view and complete key actions related to missions, applications, and claims.
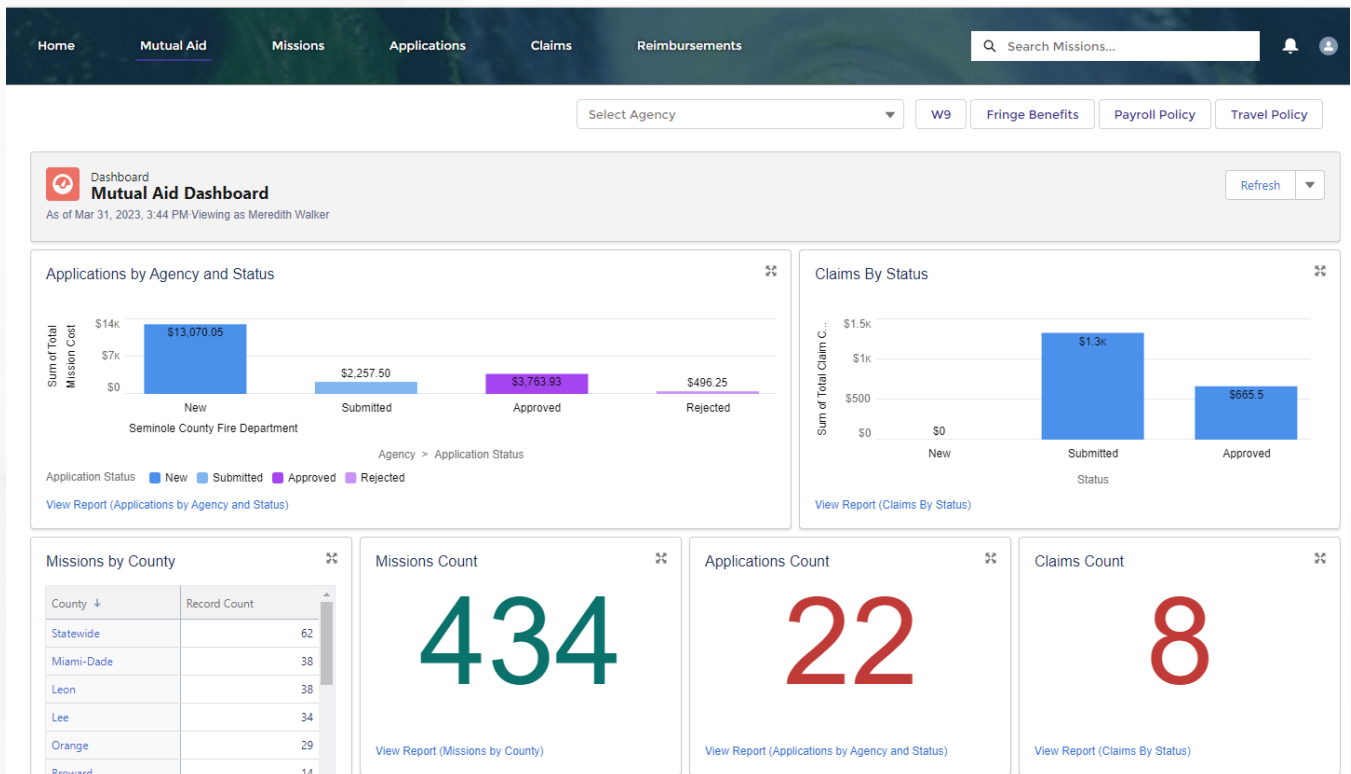
Access Mutual Aid Portal

1. Once a Financial Point of Contact logs in, they will be taken to the Grants Management Portal.
2. There are two ways the Financial Point of Contact can access the Mutual Aid dashboard. They can either select the tile titled **Mutual Aid** on the right-hand side of the screen, or select the heading also titled Mutual Aid in the top left-hand corner. Clicking either icon will navigate to the Mutual Aid dashboard.
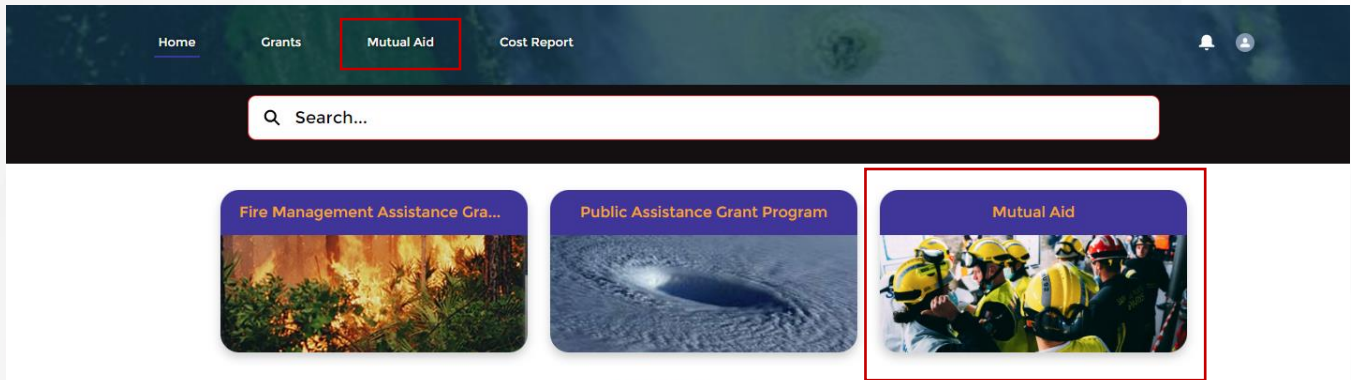
3. The system will display the Financial Point of Contact's Mutual Aid Dashboard homepage. Each component of the dashboard is outlined in detail below.

Mutual Aid Portal Dashboard: Header

Use the dashboard's header located horizontally across the top of the Mutual Aid Portal to navigate to specific pages on the Portal. The Financial Point of Contact can also use the many tiles below the header to navigate to where they need to go. Each item on the header is explained below:

Home

Selecting Home navigates the user back to the Grants Management Portal.

Mutual Aid

If the Financial Point of Contact is not already on the Mutual Aid Portal Dashboard, selecting Mutual Aid navigates the user back to the Mutual Aid Portal Dashboard homepage.

Missions

1. Selecting Missions navigates the user to the **Missions** page.

2. This page displays all missions currently in the FDEM system. The system defaults to displaying a list view of all available missions.
   a. From this page, the user can
      i. Click on a particular mission to view the details of that mission.
      ii. Use the search box to find a particular mission.

Resource Support Agreements

1. Selecting RSAs in the header bar navigates the user to the **Resource Support Agreements** page.

2. This page displays all RSAs/cost estimates for the Financial Point of Contact and the assisting agencies under their purview and where they are located in the process.
   a. Status options for RSAs are: New, Submitted, Approved or Rejected
   b. Note: System will automatically update status when it is changed by FDEM administrators.
   c. The user can always click on an RSA/cost estimate to view and adjust the details (if they are the designated Financial Point of Contact).

Claims

1. Selecting Claims navigates the Financial Point of Contact to the Claims page.
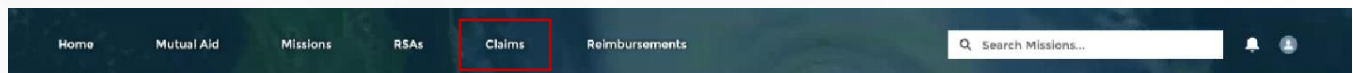
2. This page displays all claims for the Financial Point of Contact and the assisting agencies under their purview. Each claim is displayed on the page based on the current status and will include the **Claim Number**, the **Claim Amount Requested**, and the associated **Assisting Agency**. The user can click on any claim to see more details.
   a. Status options for Claims are: New, Submitted, Approved, Returned, Paid
   b. Note: System automatically updates the status when it is changed by FDEM administrators.
   c. The user can always click on a claim to view and adjust the details (if they are the designated Financial Point of Contact).

Reimbursements

1. Selecting Reimbursements navigates the Financial Point of Contact to the Reimbursement page that provides a listing of invoices for the agency.

Mutual Aid Portal Dashboard: Homepage & Reports

Selecting Mutual Aid tab navigates the user to the **Mutual Aid dashboard** homepage. In addition to the quick links on the homepage outlined in the section above, the Mutual Aid dashboard homepage has the following tiles listed and will navigate the user to a Report with additional details. To access the report, click the View Report (blue link) in each section.
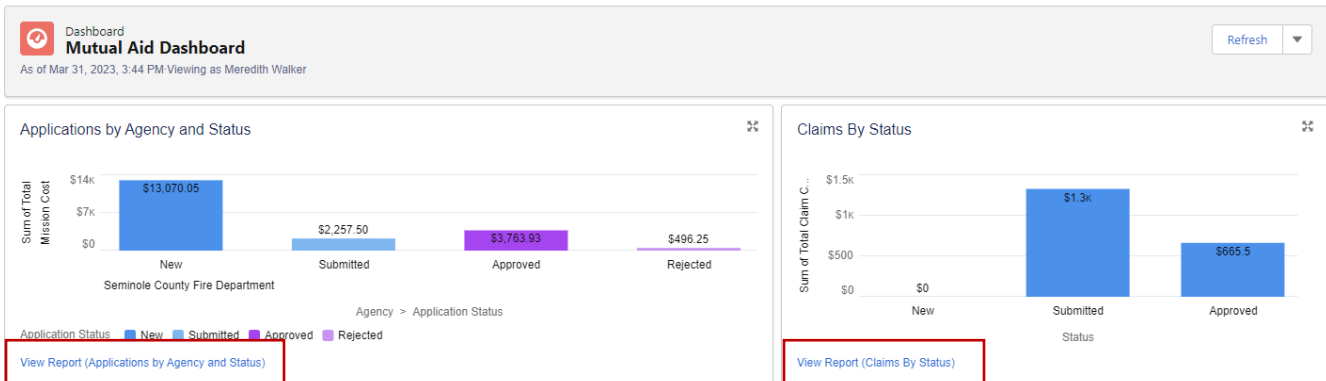
The details of those reports are covered in the next section.

1. **Applications by Agency & Status:** displays existing applications by their current status in the FDEM Salesforce system. If the Financial Point of Contact has more than one Assisting Agency associated with their login details, all heir Agencies and status details will display.

2. **Claims by Status**: includes Claims in the New, Under Review, Recalled, Approved, and Rejected

3. **Missions by County:** mission count by all counties in the state of Florida

4. **Missions Count:** total # of missions in the system

5. **Applications Count:** total # of Applications for that particular Financial Point of Contact

6. **Claims Count:** total # of Claims for that particular Financial Point of Contact. Shows same report as Claims by Status.

7. **Agency Documents Status:** Ability for Financial Point of Contact to add all necessary documentation. These documents include: W9 Form, Fringe Benefits, Payroll Policy, Travel Policy. View also indicates which of these documents have been uploaded and which are still needed.

Report: Accounts
Agency Documents Status

Enable Field Editing

Total Records
2

	Account Name	W9 Attached	Fringe Benefits Attached	Payroll Policy Attached	Travel Policy Attached
1	4 Rivers Smokehouse	✅	✅	✅	✅
2	Seminole County Fire Department	✅	✅	✅	✅

Support Available
DEMES Support Resources
For more information and to stay informed of project updates, please visit the DEMES page on the Florida Disaster website. This site contains support resources, including support contacts, FAQs, videos, and additional job aids.

Feedback
Your feedback and input is important to the success of this initiative. The project team encourages you to share your feedback and ideas for enhancement at DEMES.Support@em.myflorida.com.