User Reference Guide:

Auxiliary Relationship Management

oneresponder.net

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Contents

Glossary 2
Acronyms.....2
Responder-Initiated Organization Relationship Management.....2
Initiate Auxiliary Memberships from the Responder Portal 4
Cancel a Pending Auxiliary Membership Request.....5
Terminate an Active Auxiliary Membership 7
Accept an Organization-Initiated Auxiliary Invitation.....8
Reject an Organization-Initiated Auxiliary Invitation.....9
Organization-Initiated Auxiliary Relationship Management 10
Invite Auxiliary Personnel from the Manager Portal.....11
Cancel an Active Auxiliary connection from the Manager Portal....14
Cancel a Pending Auxiliary connection from the Manager Portal...16
Accept Responder-Initiated Auxiliary Membership Request.....17
Reject Responder-Initiated Auxiliary Membership Request.....19
Benefits of Auxiliary Connections 20

Glossary

Acronyms

- IMT = Incident Management Team
- AHIMTA = All-Hazards Incident Management Team Association

Responder-Initiated Organization Relationship Management

Introduction

OneResponder continuously strives to meet the needs of our State, Local, Tribal, and Territorial users. One component of this involves the ability for all Responders to maintain an accurate online reflection of their careers. This includes memberships not only within an individual's Primary Organization, but also any auxiliary connections they may have.

Within OneResponder, Auxiliary Organizations are those organizations to which an individual belongs without losing their connection to their Primary Organization.

For example: John Doe is an employee at his state's Department of Emergency Management. When he accepts his invitation to join OneResponder, his primary place of employment will be listed in his Responder Profile as his "Primary Organization." If he is also a member of the All-Hazards Incident Management Team Association (AHIMTA), he can establish an Auxiliary connection to that

organization. If, while still employed by the Department of Emergency Management, John Doe begins volunteering at his local fire department, he can also establish an Auxiliary connection to the fire department – without losing his previously-established auxiliary connection to AHIMTA.

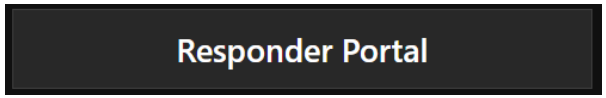
Individuals within OneResponder are able to hold Auxiliary connections to multiple organizations. As they progress through their career, they can terminate their connections to any of their Auxiliary organizations at any time, without any impact to their Primary Organization. Additionally, over the course of an individual's career, they may relocate, necessitating a change in their Primary Organization. This change can be completed without impacting that individual's current auxiliary connections.

Not only will establishing Auxiliary connections provide an accurate digital reflection of an individual's career, it allows administrators in those Auxiliary organizations to update the individual's training and qualification information as they gain more experience and successfully complete training requirements.

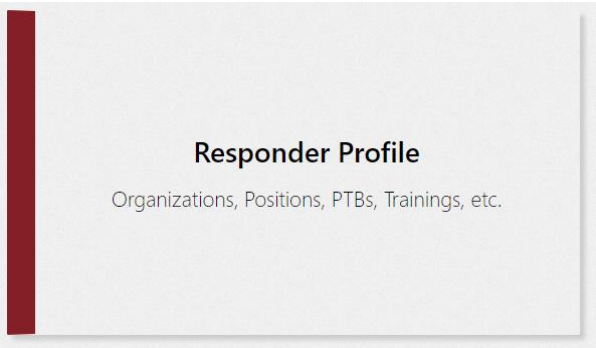
This user guide will demonstrate the functionalities of managing Auxiliary organization memberships in OneResponder, both within the Responder Portal and the administrative Manager Portal. The first section will address the elements of Auxiliary Memberships from within the Responder Portal.

Initiate Auxiliary Memberships from the Responder Portal

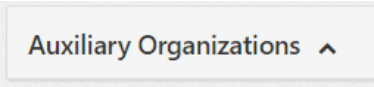
1. Log in to the OneResponder Responder Portal.

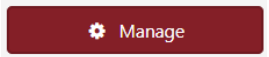


2. Locate and select the "Responder Profile" tile.

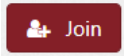


3. On the Responder Profile, locate the "Auxiliary Organizations" meu bar. Select ^ to expand it and view all organizations to which you currently hold an auxiliary connection.



4. To initiate a new Auxiliary membership, locate and select the 

on the far-right side of the menu bar to navigate to a page titled "Manage Auxiliary Organizations."

5. In the top right corner of the page, locate and select 

to open a modal listing all organizations in the system.

   a. If you've already got a connection to an organization, you are unable to initiate a new connection to that organization.

   b. Organizations must have at least one assigned administrator before any auxiliary membership requests can be sent.

6. Locate and select the appropriate organization by clicking

to the left of the organization.

   a. You're able to initiate multiple Auxiliary Membership requests at once. To do so, repeat 6 as many times as is appropriate.

7. Once you've chosen all appropriate organizations, locate and select

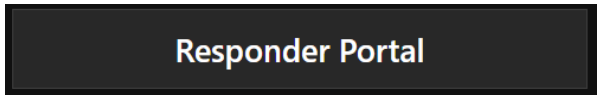
at the bottom right of the modal to send requests to all selected organizations and will be displayed on the "Manage Auxiliary Relationships" page with Status: Pending. They will be further demarcated with their corresponding rows highlighted yellow.

    a. When you initiate an auxiliary connection to an organization, administrators within that organization will be able to view a limited view of your Personnel Details page in the Organization Manager.

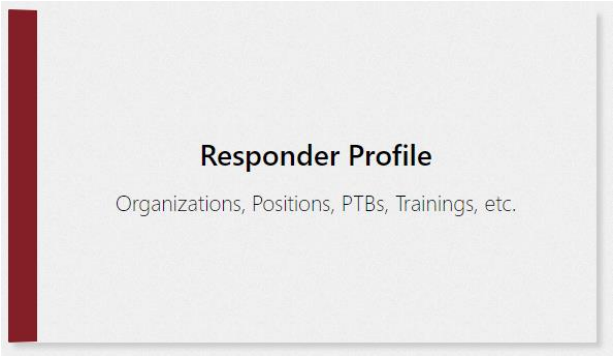
    b. Upon acceptance of the request, administrators within that organization will be able to view your full Personnel Details page and will be able to update your training and qualifications information as appropriate.

Cancel a Pending Auxiliary Membership Request

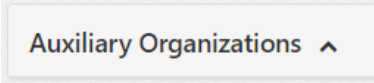
1. Log in to the OneResponder Responder Portal.



2. Locate and select the "Responder Profile" tile.

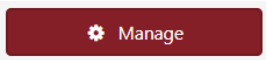


3. On the Responder Profile, locate the "Auxiliary Organizations" menu bar. Select ^ to expand it and view all organizations to which you currently hold an auxiliary connection.



    a. Any Auxiliary Membership request that is still in Status: "Pending" will be highlighted yellow.

b. If an individual has an Auxiliary Membership request that is still in Status: “Pending”, they can click the “Pending” to view the workflow associated with that membership request.

4. To manage your Auxiliary Memberships, locate and select 

on the far-right side of the menu bar to navigate to a page titled “Manage Auxiliary Organizations.”

5. Locate the appropriate pending Auxiliary Membership Request. In the far-left column, locate and select

.

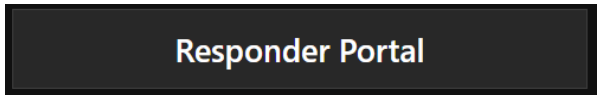
   a. This will cancel the Pending Auxiliary Membership Request.

      i. Once you cancel a Pending Auxiliary Membership Request, administrators in that organization will no longer have any access to your Personnel Details page.

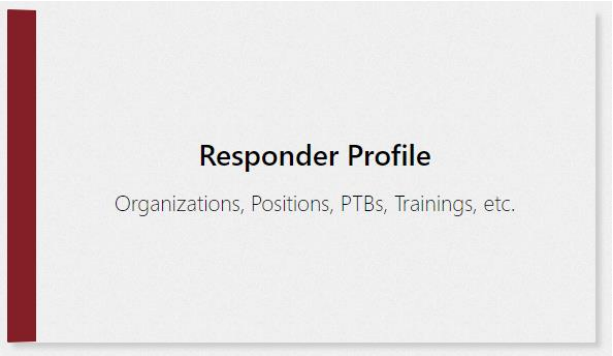
   b. NOTE: if you make a mistake and cancel the wrong Pending Auxiliary Membership Request, you are able to re-initiate the membership request from within the Responder Portal.

Terminate an Active Auxiliary Membership

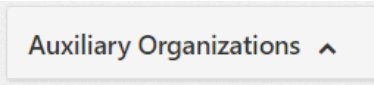
1. Log in to the OneResponder Responder Portal.

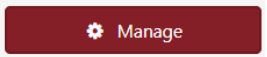


2. Locate and select the "Responder Profile" tile.



3. On the Responder Profile, locate the "Auxiliary Organizations" menu bar. Select ^ to expand it and view all organizations to which you currently hold an auxiliary connection.



4. To manage your Auxiliary Memberships, locate and select the 

on the far-right side of the menu to navigate to a page titled "Manage Auxiliary Organizations."

5. Locate the appropriate active Auxiliary Membership. In the far-left column, locate and select

.

6. You will be prompted with a modal asking you to confirm your choice to leave the selected organization.

   a. If you select "Yes," your auxiliary connection to that organization will be terminated. Administrators within that organization will no longer be able to view your Personnel Details page.

   b. If you select "No," no action is taken.

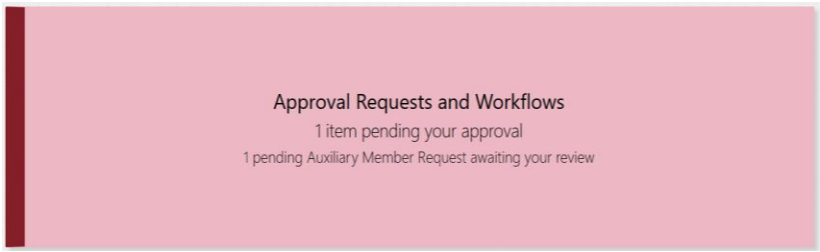
Accept an Organization-Initiated Auxiliary Invitation

1. Log in to the OneResponder Responder Portal.

   Responder Portal

   a. If you have a workflow that requires your review, such as a pending Organization-Initiated Auxiliary Invitation, you will see a pink tile titled "Approval Requests and Workflows."

2. Select the "Approval Requests and Workflows" tile to be taken to a page listing all Pending workflows.

3. Locate the appropriate workflow.

   a. Auxiliary invitations initiated by an organization administrator will be displayed as "Auxiliary Member Request."

4. Select to the left of the appropriate workflow. This will take you to a page with the workflow details, where you can view workflow information and can add any comments or documents necessary to contextualize the invitation.

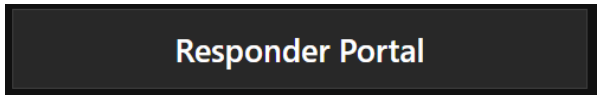
5. In the top right corner of the page, there are two buttons: an "Approve" and a "Reject" button. To accept the invitation, select Approve.

   a. You will be prompted with a modal to confirm your choice. The modal also contains a text box allowing you the option to add comments to contextualize your acceptance. Enter any comment and select Approve to confirm your acceptance.

b. Once you've accepted an organization's auxiliary invitation, administrators within that organization will be able to view your full Personnel Details page and will be able to update your training and qualification information as appropriate.

Reject an Organization-Initiated Auxiliary Invitation

1. Log in to the OneResponder Responder Portal.



   a. If you have a workflow that requires your review, such as a pending Organization-Initiated Auxiliary Invitation, you will see a pink tile titled "Approval Requests and Workflows."

2. Select the "Approval Requests and Workflows" tile to be taken to a page listing all Pending workflows.

3. Locate the appropriate workflow.

   a. Auxiliary invitations initiated by an organization will be displayed as "Auxiliary Member Request."

4. Select to the left of the appropriate workflow. This will take you to a page with the workflow details, where you can view workflow information and can add any comments or documents necessary to contextualize the invitation.

5. In the top right corner of the page, there are two buttons: a green “Approve” and a red “Reject” button. To reject the invitation, select Reject.

    a. You will be prompted with a modal asking you to confirm your choice. The modal also contains a text input box allowing you to contextualize your rejection.

    Enter any appropriate comment and select Reject to confirm your rejection of the invitation.

    b. Once you’ve rejected an organization’s invitation, administrators within that organization will no longer be able to view any part of your Personnel Details page.

Organization-Initiated Auxiliary Relationship Management

Introduction

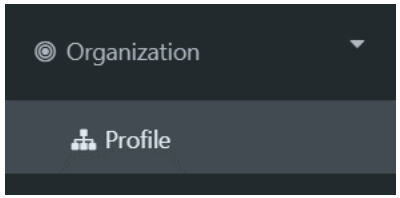
While auxiliary connections are managed primarily through the Responder Portal, these relationships can also be managed by administrators in the organization manager portal. Organization administrators are able to invite individuals to join their organization in an auxiliary capacity, establishing a connection that does not cause the individual to lose their connection to their Primary Organization, as well as cancel a Pending Auxiliary request and release an Active Auxiliary individual. This section of the user guide will demonstrate the elements of auxiliary management that can be performed within the Organization Manager.

Invite Auxiliary Personnel from the Manager Portal

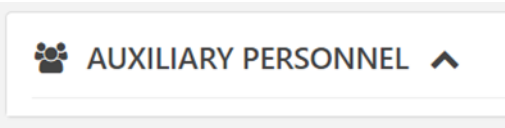
1. Log in to the OneResponder Organization Manager.

   Organization Manager

2. In the dark grey menu on the left-hand side of the page, locate and select the "Organization" option. Select the "Profile" option to navigate to your organization's Profile page.

3. Locate the "Auxiliary Personnel" grid. Select ^ to view all individuals who hold an auxiliary connection to your organization.

   a. Both Active and Pending Auxiliary connections will be displayed within this grid.

   b. Individuals can have an auxiliary connection that is independent of their Personnel Status. That is, if an individual is still Status: Onboarding, they are still able to be receive invitations to join an organization as an Auxiliary Personnel.

   c. If an individual's Personnel Status changes, there is no immediate change made to any Active Auxiliary connections.

4. To invite an individual to join your organization as an Auxiliary member, locate and select

on the far right of the "Auxiliary Personnel" grid. This will navigate you to a page titled "Manage Auxiliary Personnel."

   a. The "Manage Auxiliary Personnel" page allows administrators to invite individuals to join their organization as an Auxiliary member, but they can also cancel any currently Pending invitations and release

any individuals from an Active Auxiliary connection to their organization.

5. In the top right corner, locate and select Invite. This will open a modal containing a list of all personnel in the OneResponder system who do not currently have a connection to your organization.
    a. In order to invite an individual to be an auxiliary member in your organization, they must not have any preexisting connection to your organization. This includes:
        i. Any of your Direct Personnel, regardless of their Personnel Status.
        ii. A Direct Personnel within your subordinate organization(s), regardless of their Personnel Status.
        iii. Any individual who holds an administrative role within your organization or within one of your subordinate organizations.
        iv. Any individual who currently holds an Active or Pending Auxiliary connection to your organization.
6. Locate the appropriate individual.
    a. If you know the individual's name or their Primary Organization, you can use the quick-search tool to look them up directly.
    b. You can also use the Filters to narrow your search for the appropriate individual(s).
7. Once you've located the appropriate individual, click Select to the left of their name.
    a. If necessary, you are able to invite multiple people as Auxiliary Personnel to your organization during the same session.

In the event you need to invite multiple people to join your organization as Auxiliary Personnel, repeat Steps 6 - 7 as many times as appropriate.

8. After you've selected all individuals to whom you wish to extend an Auxiliary invitation, locate and select

at the bottom right of the modal.

9. You will be prompted with a Comment modal, allowing you the option to add a comment to contextualize your invitation.

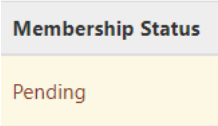
    a. If you would like to add a comment, type it into the comment box and select

at the bottom right of the modal.

        i. NOTE: If you invite multiple individuals during the same session, any comment you add will be sent to ALL selected individuals.

    b. If you do not want to include a comment, you can choose to forgo adding a comment and select the "Submit" button at the bottom right of the modal.

10. As soon as you click the "Submit" button, that will confirm your invitation. The invited individual(s) will be displayed in the "Auxiliary Personnel" grid with a Membership Status: Pending, and their respective row(s) will be highlighted yellow.



Membership Status
Pending

    a. Once you've invited an individual to join your organization as an Auxiliary member, that individual can either accept or reject the invitation in their Responder Portal.

        i. While invited Personnel remain in the Membership Status: Pending, administrators can access a limited view of their Personnel Details page; however, they are not able to view

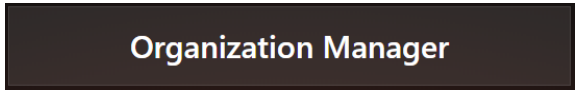
any of their contact details or qualification information.

ii. If they accept their invitation, that individual's Membership Status will change from "Pending" to "Active" and administrators will be able to view their full Personnel Details page, including their contact details or qualification information.

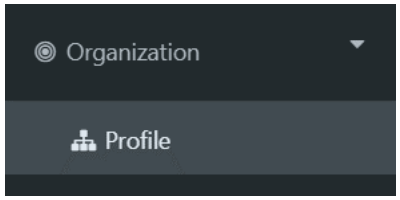
iii. If an individual rejects their invitation, their Pending invitation will be rejected, and the individual's name will be removed from the inviting organization's Auxiliary Personnel grid. Administrators will no longer be able to view any of that individual's Personnel Details page unless they send another invitation (at which point a Pending invitation permits only a partial view of the Personnel Details page).

Cancel an Active Auxiliary connection from the Manager Portal

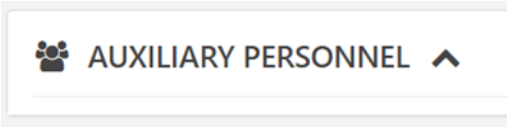
1. Log in to the OneResponder Organization Manager.



2. In the dark grey menu on the left-hand side of the page, locate and select the "Organization" option to display specific navigation options. Select the "Profile" option to be navigated to your organization's Profile page.



3. Locate the "Auxiliary Personnel" grid and select ^ to view all individuals who hold an auxiliary connection to your organization.



a. Both Active and Pending Auxiliary connections will be displayed within this grid.

b. Individuals can have an auxiliary connection that is independent of their Personnel Status. That is, if an individual is still Status: Onboarding, they are still eligible to be invited as an Auxiliary member to an organization.

c. If an individual's Personnel Status changes, there is no immediate change made to any Active Auxiliary connections.

4. To review and edit both Active and Pending Auxiliary connections, select Manage on the far-right side of the menu bar to navigate to a page titled "Manage Auxiliary Personnel".

5. Within the "Auxiliary Personnel" grid on the "Manage Auxiliary Personnel" page, administrators can view both Active and Pending Auxiliary connections, and from this page, can terminate either type of Auxiliary connection.

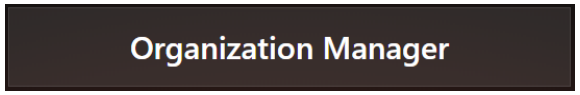
6. To end an Active Auxiliary connection, locate the appropriate individual and select Release the left of their name. You will be prompted with a warning modal asking you to confirm your choice.

   a. If you select "Yes," the individual will be released from that Auxiliary connection and their relationship to your organization will be removed. Administrators within your organization will no longer have any access to that individual's Personnel Details page.

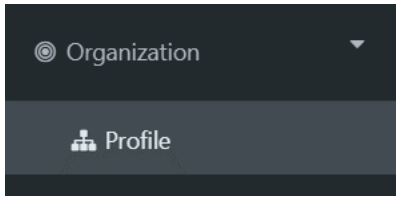
   b. If you select "No," no further action will be taken, and the individual will remain as an Active Auxiliary connection to your organization.

Cancel a Pending Auxiliary connection from the Manager Portal

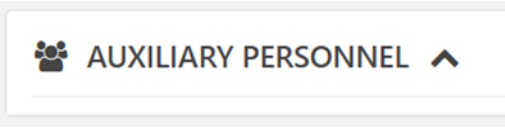
1. Log in to the OneResponder Organization Manager.



2. In the dark grey menu on the left-hand side of the page, locate and select the "Organization" option to display specific navigation options. Select the "Profile" option to be navigated to your organization's Profile page.



3. Locate the "Auxiliary Personnel" grid and select ^ to view all individuals who hold an auxiliary connection to your organization.



   a. Both Active and Pending Auxiliary connections will be displayed within this grid.

   b. Individuals can have an auxiliary connection that is independent of their Personnel Status. That is, if an individual is still Status: Onboarding, they are still eligible to be invited as an Auxiliary member to an organization.

   c. If an individual's Personnel Status changes, there is no immediate change made to any Active Auxiliary connections.

4. To review and edit both Active and Pending Auxiliary connections, select

on the far-right side of the menu bar to navigate to a page titled "Manage Auxiliary Personnel".

5. Within the "Auxiliary Personnel" grid on the "Manage Auxiliary Personnel" page, administrators can view both Active and

Pending Auxiliary connections, and from this page, can terminate either type of Auxiliary connection.

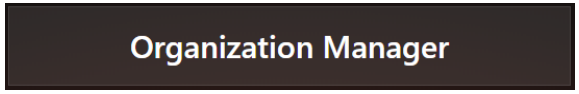
6. To end a Pending Auxiliary connection, locate the appropriate individual and select ✖ Cancel to the left of their name. You will be prompted with a warning modal asking you to confirm your choice.

    a. If you select "Yes," the invitation will be cancelled, and the individual will no longer be listed among your Auxiliary Personnel. Administrators within your organization will no longer have any access to that individual's Personnel Details page.

    b. If you select "No," no further action will be taken, and the individual will remain as a Pending Auxiliary connection to your organization until they either accept or reject the invitation.

Accept Responder-Initiated Auxiliary Membership Request

1. Log in to the OneResponder Organization Manager.



2. In the top right corner of the page, locate the bell icon. All pending workflows for which you are an eligible reviewer will be reflected as a number to the right of the bell. Select to be navigated to the Workflows page.

3. Locate the appropriate workflow. If necessary, the Filters and quick-search tool can be utilized to narrow the results.

    a. The Workflow Class "Personnel Relationship Operation" and Type "Responder Initiated Auxiliary Member Request" will display all Responder-initiated requests for Auxiliary Membership to your organization.

4. Select to the left of the appropriate workflow to be taken to the Workflow Details page. On this page, you will be able to

see the high-level details in the "Workflow Information" panel, as well as all Steps in the workflow and all eligible reviewers.

a. As the recipient of an Auxiliary membership request, you are also able to add any pertinent comments and/or attach any relevant documents to the workflow.

5. Review all pertinent information.

NOTE: While the workflow remains active and the individual's connection remains in Status: Pending, reviewing administrators will only be able to view a limited version of the requesting individual's Personnel Details page, and will be unable to view their contact details and qualification information.

6. If all information is correct and you are ready to accept the individual's request, locate and select Approve in the top right corner of the Workflow Details page.

7. You will be prompted with a modal to confirm your choice. If appropriate, type in a comment and select ✔ Approve.

This will confirm your acceptance of the individual's request and their Membership Status to your organization will be updated from "Pending" to "Active," and administrators within your organization will be able to view that individual's full Personnel Details page, including their contact details and qualification information.

a. Any comment you add will be recorded within the workflow. The requesting individual will be unable to view this comment, but administrators within your organization with access to the workflows page will be able to view those comments.

Reject Responder-Initiated Auxiliary Membership Request

1. Log in to the OneResponder Organization Manager.

   Organization Manager

2. In the top right corner of the page, locate the bell icon. All pending workflows for which you are an eligible reviewer will be reflected as a number to the right of the bell. Select to be navigated to the Workflows page.

3. Locate the appropriate workflow. If necessary, the Filters and quick-search tool can be utilized to narrow the results.

   a. The Workflow Class "Personnel Relationship Operation" and Type "Responder Initiated Auxiliary Member Request" will display all Responder-initiated requests for Auxiliary Membership to your organization.

4. Select to the left of the appropriate workflow to be taken to the Workflow Details page. On this page, you will be able to see the high-level details in the "Workflow Information" panel, as well as all Steps in the workflow and all eligible reviewers.

   a. As the recipient of an Auxiliary membership request, you are also able to add any pertinent comments and/or attach any relevant documents to the workflow.

5. Review all pertinent information.

   NOTE: While the workflow remains active and the individual's connection remains in Status: Pending, reviewing administrators will only be able to view a limited version of the requesting individual's Personnel Details page, and will be unable to view their contact details and qualification information.

6. If all information is correct and you are ready to accept the individual's request, locate and select Reject in the top right corner of the Workflow Details page.

7. You will be prompted with a modal to confirm your choice. If appropriate, type in a comment and select ✖ Reject.

   This will confirm your rejection of the individual's request. The workflow will be updated with a status of "Rejected" and the individual will be informed with an email notification that their request has been denied. Once the request is rejected, administrators within your organization will no longer be able to access any version of the requesting individual's Personnel Details page.

   a. Any comment you add will be recorded within the workflow. The requesting individual will be unable to view this comment, but administrators within your organization with access to the workflows page will be able to view those comments.

Benefits of Auxiliary Connections

While it is by no means a mandatory element to participating in OneResponder, maintaining your auxiliary relationships can prove helpful in several ways.

- If you are a member to an organization outside of your primary employer, and this secondary organization provides you training or qualifications certifications, establishing that auxiliary connection within OneResponder allows administrators of that organization to award appropriate training and qualifications credits as you complete them.
- If you are participating in an interjurisdictional exercise or incident response, it may prove helpful to establish a connection to the lead jurisdiction within OneResponder in order to facilitate rapid communications.
- If you are a member of a regional or state IMT, establishing an auxiliary connection to that IMT within OneResponder allows you to reflect that membership in a digital capacity.