

CHARITY TRACKER WORKSHOP

PRACTICE SESSION

I – UPDATE AGENCY and AGENTS INFORMATION

STEP 1: Go to “My Agency” (top right tabs)

STEP 2: Review address, phone numbers, and add website link

STEP 3: ADD or REMOVE Agents as needed

II – UPDATE SERVICES

STEP 1: Start from “My Agency”

STEP 2: Click on the “Services” tab

STEP 3: Review and update services

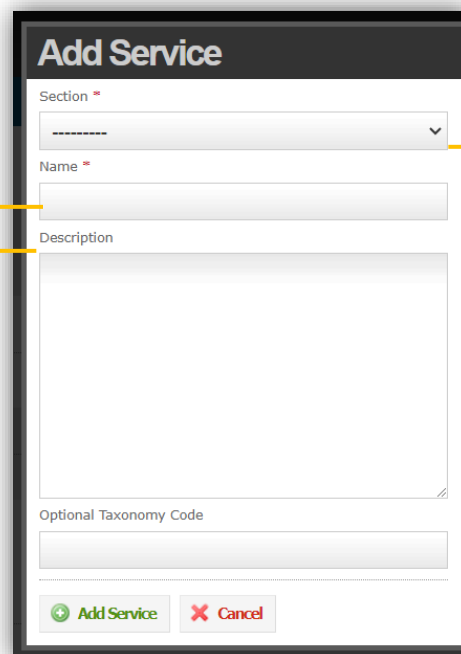
- Click on EDIT to update service description.
- Click on DELETE to remove a specific service.
- Click on ADD SERVICE to add any service available for survivors during the response.

Service Area Options:

- Back-up Power / Heat
- Building and Repair
- Communications
- Counseling
- Debris Removal
- Financial Assistance
- Food
- Household
- Housing/Loding
- Information and Planning
- Mass Care
- Medical and Health Services
- Mental & Spiritual Wellbeing
- Other
- Pet Care and Protection
- Security Services
- Transportation
- Utilities
- Volunteers

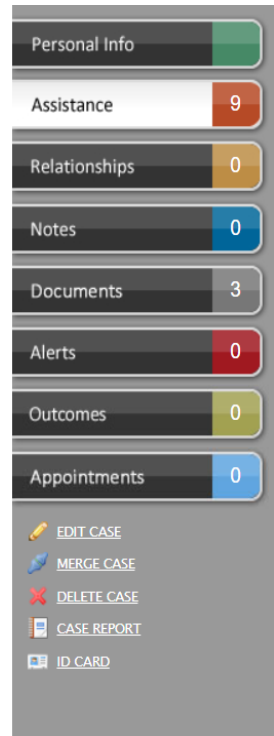
Name: type of resource/service (e.g., generators).

Description: e.g., portable fuel generators available for survivors 60 years and older.



III – CASE REFERRAL DOCUMENTATION (FAQ)

1. What to expect as an organization?
 - a. The casework agency will look at the list of services provided by the organizations registered in Charity Tracker.
 - b. Based on the survivors' needs, the casework agency will match them with one or more organizations providing the services specific to fulfill the survivors needs.
2. What is expected from the organization receiving a referral?
 - a. All agents listed in Charity Tracker as part of your organization will be notified of the referral through email.
 - b. Once the organization fulfills the need, the organization must close out the case and document in Charity Tracker the type of service and the amount of assistance provided (if needed to the survivor.
 - c. Organizations are required to document any assistance provided within 24hours.



Personal Info	
Assistance	9
Relationships	0
Notes	0
Documents	3
Alerts	0
Outcomes	0
Appointments	0

- [EDIT CASE](#)
- [MERGE CASE](#)
- [DELETE CASE](#)
- [CASE REPORT](#)
- [ID CARD](#)

IV – OTHER / REMINDERS

- a. Requirements:
 - i. Be a member of Nashville VOAD
 - ii. The organization will be offering a service to survivors in the response phase
 - iii. Have signed the MOU with the United Way
- b. Obtaining Access:
 - i. Create an account in Charity Tracker and add agency users to the organization's account
 - ii. Add a description of your organization
 - iii. List the services that will be provided during a disaster response
- c. Expectations:
 - i. Remain as an active VOAD member
 - ii. Respond and participate of VOAD Coordination Calls
 - iii. Keep your organization's information up to date once a quarter.