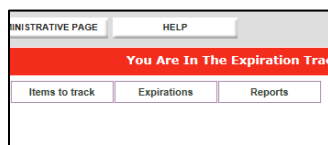# EXPIRATION TRACKER

Keeping track of expiration dates has never been easier than through the use of IamResponding.com's **Expiration Tracker**. Whether you are tracking expiration dates for your members (such as CPR certifications, EMT cards, physicals, etc.)or expiration dates for your department (such as vehicle registrations, hose testing deadlines, your narcotic license, dates for replacement of turnout gear, equipment inspection deadlines, etc.), all of your expiration dates are automatically tracked through a very simple to use interface that prevents any such dates from "slipping through the cracks."

IamResponding.com's Expiration Tracker eliminates virtually all of the time that is currently spent tracking expiration dates, by automating the tracking of the dates, and providing constant date reminders. Members can track all of their own dates, and will receive automated email reminders as expiring dates approach. Automated emails are also sent weekly to any members that you designate, advising of anything that expires within the next 30, 60, 90 or 120 days.

I. ACCESS EXPIRATION TRACKER
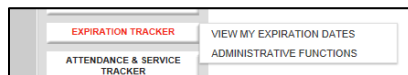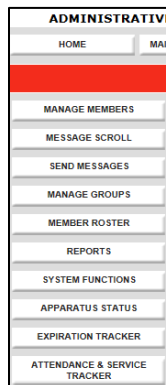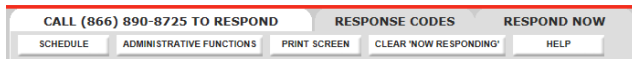
To access Expiration Tracker:

- Go to the Administrative Functions page. You must have privileges to get to this page.

- On the Administrative Functions page, click the "Expiration Tracker" button.

- Members can track their expiration dates under "View My Expiration Dates". Administration of this feature is performed under "Administrative Functions". Select "Administrative Functions".

- Three tabs will appear:

  o Items to track: Here you create the list of items that you will track the expiration dates.

  o Expirations: Here you add the expiration dates for individuals, groups and items.

  o Reports: Here you select who automatically receives weekly expiration reports, and you view the expiration reports.

II. CREATE ITEMS TO BE TRACKED

o Items to track: Here you create the list of items that you will track the expiration dates.

- Step 1: Choose whether the item relates to an "**Individual**" (such as an EMT Card, physical, their turnout gear) or whether the item is not related to a person and is related to the "**Agency**" (such as hose, drugs, a defibrillator).

- Step 2: Enter the name of the item, and then click "Update".

- At the bottom of the page are the list of items to be tracked. These can be:

  - Edited, by selecting

  - Deleted, by selecting

Note: Only the name can be edited. You cannot change from "Individual" to "Agency". The item would have to be deleted and created again.

III. TRACK EXPIRATIONS BY INDIVIDUALS

Expiration dates for individuals: Here you add the expiration dates for individuals, groups and items.

- Hover over the "Expirations" tab:

    o Expirations for Individuals: This is where you add expiration dates for items related to a single individual.

    o Choose the name from the list.

    o Enter all of the "Origination" and "Expiration" dates that apply, as well as an ID Number.

    o Select "Update" to record your changes.

    o You may also download the expiration dates record to Excel by clicking "Download" or print the file.

IV. TRACK EXPIRATION DATES BY GROUPS

Expirations for groups: Here you track origination and expiration dates for the same item for multiple individuals. Note that these are items that only apply to persons and not the agency generally.

Hover over the Expirations tab. Choose "Add Expirations by Groups".

Step 1: Select the individuals for whom you will track the same item.

Step 2: Choose the single item to track.

Step 3: Enter the "Origination date"

Step 4: Enter the "Expiration date"

Select "Update" to record the information.

V. TRACK EXPIRATION DATES FOR ITEMS

| Items to track | Expirations | Reports |

Expirations for items

Instructions: Add/edit dates by changing the field entry and selecting "Update". Delete dates by erasing them and then selecting "Update".

Item	Origination	Expiration	ID Number
150' Hose	8/1/2012	8/1/2013	12-2013
24' Ladder Test	Enter date	Enter date	
ALS 1 Registation	10/20/2009	6/15/2101	
ALS 2 Registration	10/20/2009	3/21/2013	
Birthday	Enter date	Enter date	
BLS-1 Registration	5/15/2010	6/14/2013	
BT-1 Pump Test	3/31/2010	12/30/2012	
Car 1 Registration	10/20/2009	4/20/2014	
Car 2 Registration	4/20/2009	4/19/2014	
Engine 22 Registration	10/20/2009	6/1/2013	
Engine 23 Registration	10/20/2009	4/23/2014	
Engine 7 Registration	10/21/2009	11/22/2013	
Extracation Tools	10/20/2009	5/21/2014	
HYDRANT * 1st & Academy	1/12/2008	7/29/2015	
HYDRANT * 7th & Wexler	2/22/2010	8/30/2013	
HYDRANT * High School (west)	12/21/2009	5/16/2014	
Ladder 2 Registration	10/20/2011	10/19/2013	

Track Expiration Dates for Items. This is where you track the expiration dates of items related to the agency and not related to any individual.

Hover over the "Expirations" tab, and choose "Add/Edit expirations for Items".

Add in the "Origination" and "Expiration" dates and an Identification Number if applicable.

> Items in "red" have expired.

> Items in "yellow" will expire in the next 30 days.

At the bottom of the screen, select "Update" to record the information.

You may download the information to Excel by clicking "Download".

VI. REPORTS

Expiration tracker: Select who receives reports

STEP 1: Select one or more members and/or groups to receive weekly expiration reports by email. The reports will contain all expiring items grouped by expiration dates from 120, 90, 60 and 30 days prior to the expiration, plus a list of expired items.

Members

Groups
- [ ] ALL Members
- [ ] ALS
- [ ] Arson Investigation Team
- [ ] Auxiliary
- [ ] Batt 5
- [ ] Batt. 4
- [ ] Battalion 1
- [ ] Battalion 2

STEP 2: Do you want individual members to receive automated emails 90, 60 and 30 days prior to one of their dates expiring? ● Yes ○ No

STEP 3: Do you want individual members to receive automated emails upon the expiration of any of their dates? ● Yes ○ No

| UPDATE | CANCEL |

Reports. Use this page to:

- Choose who receives reports
- Run the weekly or monthly reports

Choose who receives reports:

Step 1: Choose the members/groups who will receive weekly expiration reports.

Step 2: Select if you want them to receive the reports.

Step 3: Select if you want members to receive automated reminders of their personal expirations.

Master report

☐ Show all expirations of all items for all members
And/Or
☐ Show all expirations for all agency items

Get my expirations for all items now

GENERATE REPORT	CANCEL

Other options

Show expirations for selected members
Show expirations for selected members and selected items
Show expirations for selected agency items

Currently including these columns
☑ Origination date ☑ Expiration date ☑ ID number

Weekly & Monthly Reports:

The "weekly report" simply loads the expiration report for 30, 60, 90 and 120 days out. This is the same report that is mailed each week, above.

The "monthly report" permits several customized reports based on numerous variables. Select "Generate Report" to run each report.

Under the "Reports" button of the Expiration Tracker's Administrative Functions page, you can also designate which members will receive weekly emails with all of your department's upcoming expiration dates.These reports are automatically emailedto the designated members every Monday morning.In the same section, you canalso schedule the system to send automated emails to members 90, 60 and 30 daysprior to any of their tracked items expiring.This same section is where youcan view your agency's weekly expiration report, and all master reports, whichcan all be exported to excel.