### **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:
  - <u>Items to track</u>: Here you create the list of items that you will track the expiration dates.
  - <u>Expirations:</u> Here you add the expiration dates for individuals, groups and items.
  - <u>Reports:</u> Here you select who automatically receives weekly expiration reports, and you view the expiration reports.

## **II. CREATE ITEMS TO BE TRACKED**

	Expirations	Report	ts			
Add/Edit/Delete	Items to Track					
Items to track	Expirations	Reports				
Add items to	o be tracked					
					eren e nen	
STEP 1:	Will the item to be	e tracked relate	to an individual or to the a	gency? 🔘	Individual	O Agency
Evan	voles:					
Exam	Items that relate	to individuals:	CPR cards, EMT cards, OSH	A classes,	TB testing	
	Items that relate	to the agency:	vehicle registration, SCBA	hydro-test	, 24' ladde	r test,
	narcotics license					
	narcotics license					
STEP 2:	narcotics license Enter new item to	be tracked:	-			
STEP 2:	Enter new item to	) be tracked:	ŀ			
STEP 2:	narcotics license	be tracked:	CANCEL			
STEP 2:	narcotics license	be tracked:				
STEP 2: Edit/delete	Enter new item to	be tracked:UPDATE	CANCEL			
STEP 2: Edit/delete	narcotics license Enter new item to items to be trai	be tracked:	cancel		ingen er og l	ha cancel icon
STEP 2: Edit/delete To edit an item revert the chan	Enter new item to items to be tran- just click on the ed ges. To delete an it	b be tracked: uPDATE ckcd Rt button. After fi tem, just click on	inishing the changes click on the delete icon.	the accept i	icon, or on t	the cancel icon t
STEP 2: Edit/delete To edit an item revert the chan	narcotics license Enter new item to 	b be tracked: uPDATE cked fit button. After fi fit button. After fi	inishing the changes click on the delete icon.	the accept i	icon, or on t	he cancel icon t
STEP 2: Edit/delete To edit an item revert the chan	narcotics license Enter new item to 	b be tracked: uPDATE cked fit button. After fi form, just click on	inishing the changes click on the delete icon. Relates to	the accept i	icon, or on t	he cancel icon t
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STEP 2: Edit/delete To edit an item revert the chan Sail Out Geer Insp Sunker Boots	narcotics license Enter new item to items to be tran just click on the ed ges. To delete an it item	b be tracked: urpart: cked fit button. After fi tem, just click on	inishing the changes click on the delete icon. Relates to @ Individual © Agency @ Individual © Agency	the accept i	icon, or on t 알	he cancel icon t

- <u>Items to track</u>: 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**

Items to track	Expirations	Reports			
	Add/edit expiration	s for individuals			
Add items t	Add expirations by	groups			
	Add/edit expiration	s for items			
ems to track	Expirations	Reports			
	JL				
xpirations fo	r Individuals				
STEP 1: Se	elect a name: 🖪	rewer Chad 💌			
STEP 2: Ad	dd/edit dates an	d applicable ID numl	pers below:		
STEP 2: Ac	ld/edit dates an Ite	d applicable ID numl	oers below: Origination	Expiration	ID Number
STEP 2: Ac	Id/edit dates an Iter r Inspection	d applicable ID numl m	oers below: Origination	Expiration	ID Number
STEP 2: Ac Bail Out Gea Bunker Boots	Id/edit dates an Iter r Inspection s	d applicable ID numl	Origination	Expiration	ID Number
STEP 2: Ac Bail Out Gea Bunker Boots CC License	dd/edit dates an Iter r Inspection s	d applicable ID numl	Origination	Expiration	ID Number
STEP 2: Ac Bail Out Gea Bunker Boot: CC License CPR Card	dd/edit dates an Iter r Inspection s	d applicable ID numl	Origination Origination	Expiration 3/22/2015	ID Number
STEP 2: Ac Bail Out Gea Bunker Boots CC License CPR Card dietarysuppli	Id/edit dates an Iter r Inspection s iments	d applicable ID numl	Origination Origination 3/23/2012	Expiration 3/22/2015	ID Number
STEP 2: Ac Bail Out Gea Bunker Boots CC License CPR Card dietarysuppli EMT License	Id/edit dates an Iter r Inspection s iments	d applicable ID numl	Origination Origination	Expiration 3/22/2015	ID Number
STEP 2: Ac Bail Out Gea Bunker Boots CC License CPR Card dietarysuppli EMT License FIT Testing	Id/edit dates an Iter r Inspection s iments	d applicable ID numl	Origination 3/23/2012	Expiration 3/22/2015	ID Number
STEP 2: Ac Bail Out Gea Bunker Boot: CC License CPR Card dietarysuppli EMT License FIT Testing HIPAA	Id/edit dates an Iter r Inspection s iments	d applicable ID numl	Origination 3/23/2012	Expiration 3/22/2015	ID Number
STEP 2: Ac Bail Out Gea Bunker Boot: CC License CPR Card dietarysuppli EMT License FIT Testing HIPAA Mask Fit Test	Id/edit dates an Iter r Inspection s iments	d applicable ID numl	Origination 3/23/2012	Expiration 3/22/2015	ID Number
STEP 2: Ac Bail Out Gea Bunker Boot: CC License CPR Card dietarysuppli EMT License FIT Testing HIPAA Mask Fit Tesl OSHA Refres	Id/edit dates an Iter r Inspection s ments t	d applicable ID numl	Origination 3/23/2012	Expiration	ID Number
STEP 2: Ac Bail Out Gea Bunker Boot CC License CPR Card dietarysuppl EMT License FIT Testing HIPAA Mask Fit Test OSHA Refres Physicals	Id/edit dates an Iter r Inspection s iments t t	d applicable ID numl	Origination           3/23/2012           -	Expiration 4	ID Number

# IV. TRACK EXPIRATION DATES BY GROUPS

Items to track	Expirations	Reports			
Expirations	for groups				
STEP 1:	Select individuals				
Check	all				
🔲 Addie,	Keith				* (E)
Asprio	n, Bill				
Axton	, Mike				
🔲 Bailin,	Dave				
🔲 Baxter	r, Jeff				
🔳 Belisle	, Alexander				
🔳 Bevill,	Jason				
🔲 Blackf	ord, Clint				-
STEP 2:	Select one item to	be tracked Bail	Out Gear Inspectio	on	•
STEP 3:	Add origination da	ate			
STEP 4:	Add expiration da	te			
		UPDATE		CANCEL	

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

- Hover over the "Expirations" tab:
  - Expirations for Individuals: This is where you add expiration dates for items related to a single individual.
  - Choose the name from the list.
  - Enter all of the "Origination" and "Expiration" dates that apply, as well as an ID Number.
  - Select "Update" to record your changes.
  - You may also download the expiration dates record to Excel by clicking "Download" or print the file.

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	Items to track	Expirations	Reports
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### 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	
Laddor 2 Dogistration	10/20/2011	10/10/2013	

<u>Track Expiration Dates for Items.</u> 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.



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? § Ves  $^{\otimes}$  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		Weekly & Monthly Reports:
Items 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	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.
Currently including these columns		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 emailed to 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, which can all be exported to excel.