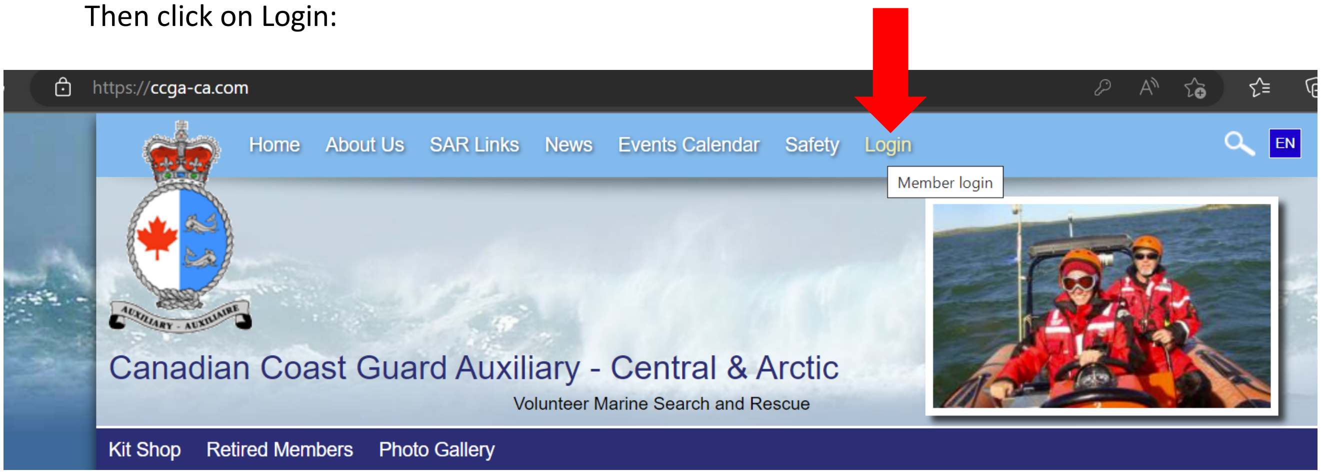
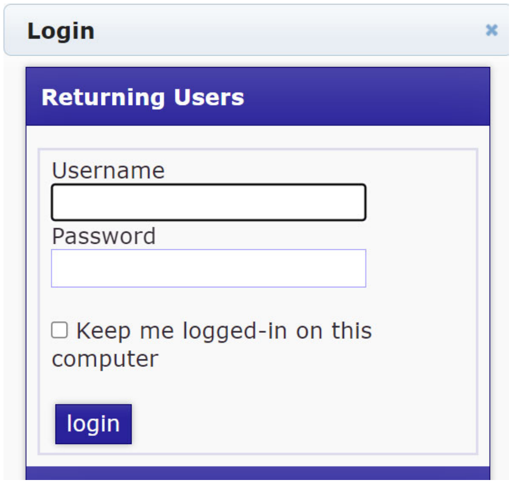
SMS CHEAT SHEET

To Access SMS go type in: www.ccga-ca.com

Then click on Login:



Input the user name as indicated on your Welcome Letter and the password emailed to you from our system then click login

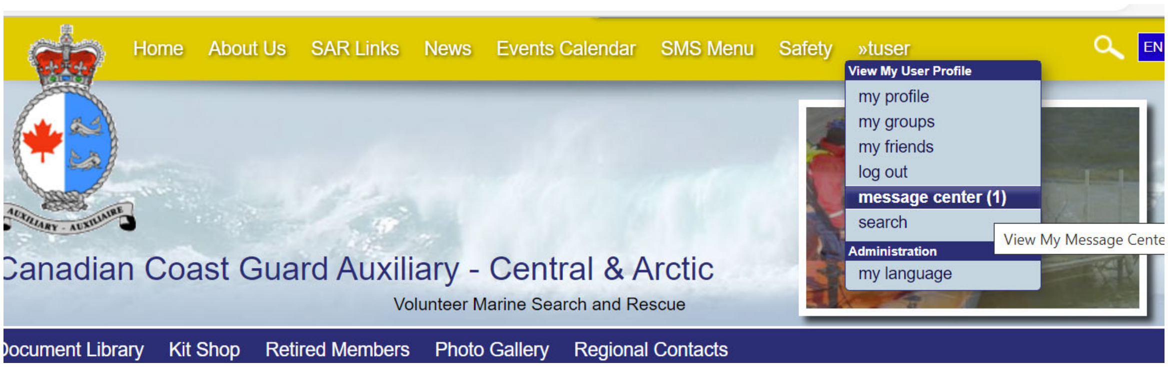


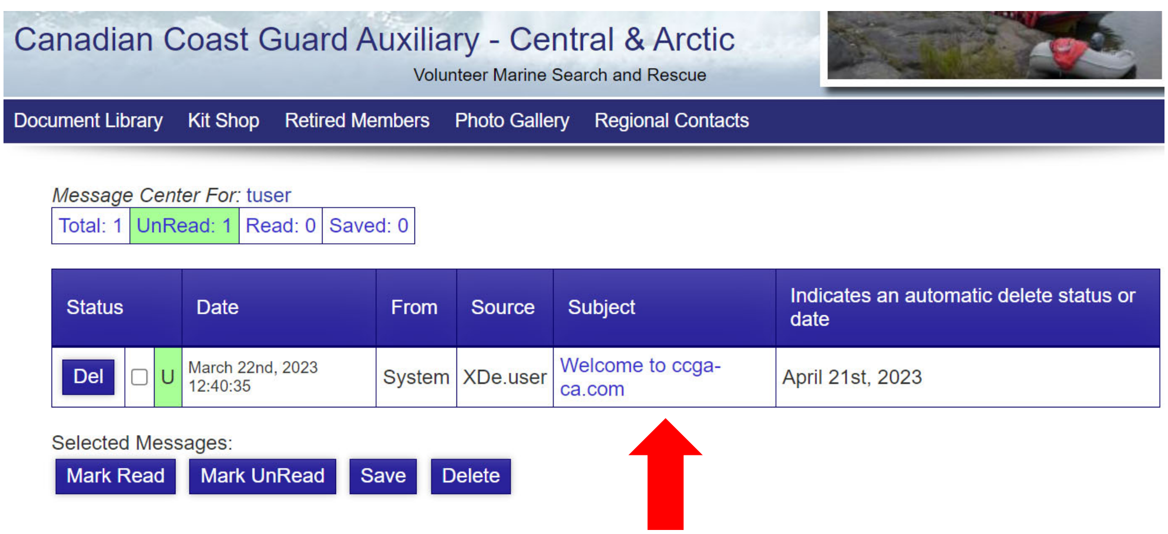
Once you are logged in, you can access your User Profile

The user profile will allow you to update your contact information, change your password, add a picture to this page.

Most importantly, this will allow you to access Broadcast Messages that have been sent to the membership. This is important especially if you have sympatico or gmail accounts, as SMS does not always “talk” to these email addresses/

Hover over your user name that is on the gold ribbon at the top of the page, then scroll down to message center. Click on Message Centre. Messages stay here for 30 days. Click on the Subject Box for each message to open. Once read, you can delete or save.





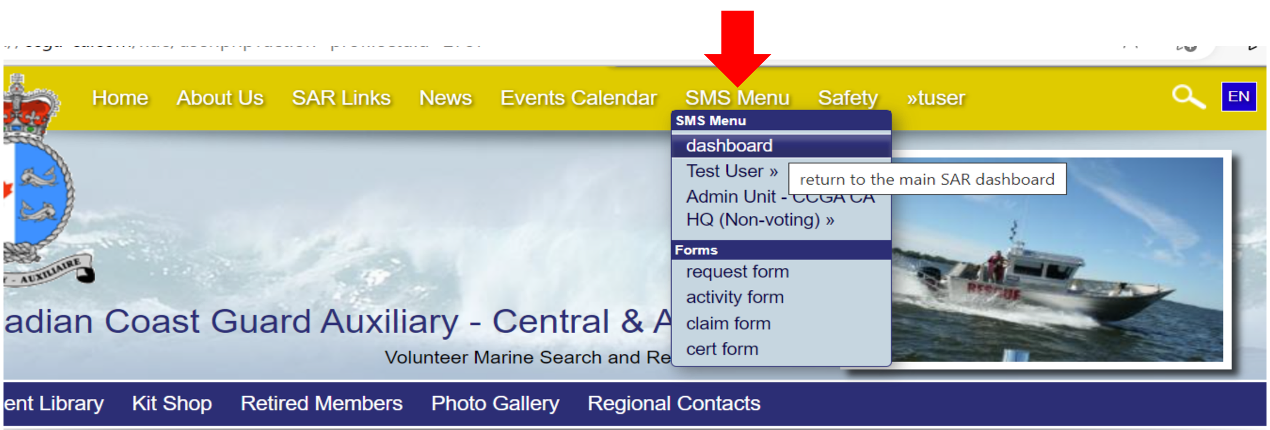
DASHBOARD:

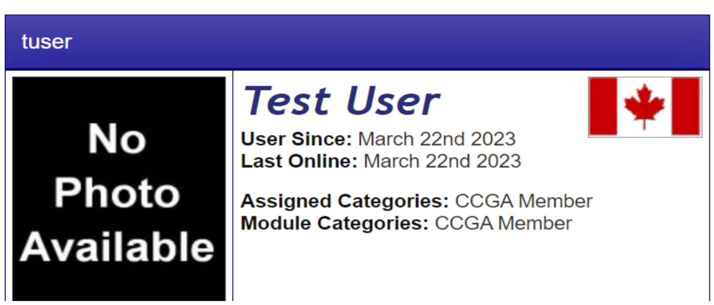
The dashboard is designed to make it easier to find the items that are used most.

From the dashboard, you can:

- Access your profile
- Submit forms including standby times, claims, certs, activity reports, requests, etc.
- See recent forms you have submitted that are pending sign off
- See if there are any incomplete forms that require further action
- View your recent activity
- Access your log
- Access your time summary
- Access the Document Library

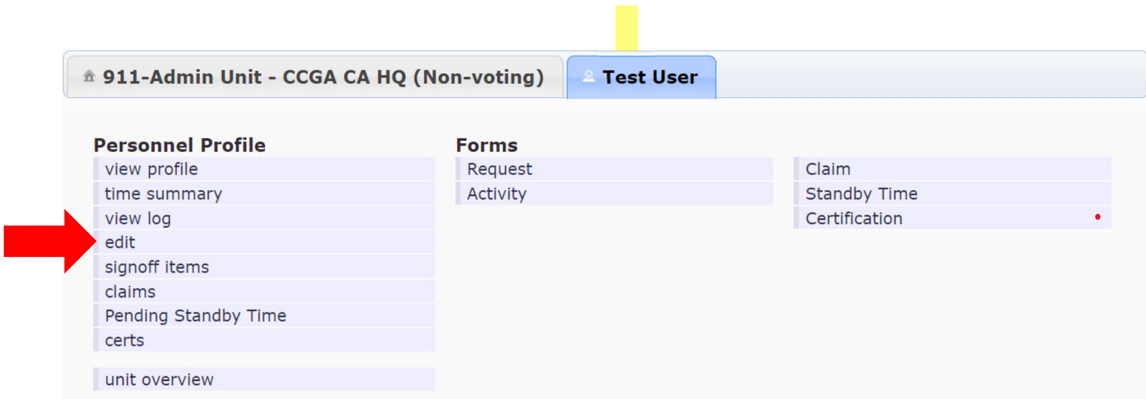
1. To get to the dashboard click on the SMS Menu at the top of the page.





Two tabs will appear once on the dashboard, your Unit and your Name.

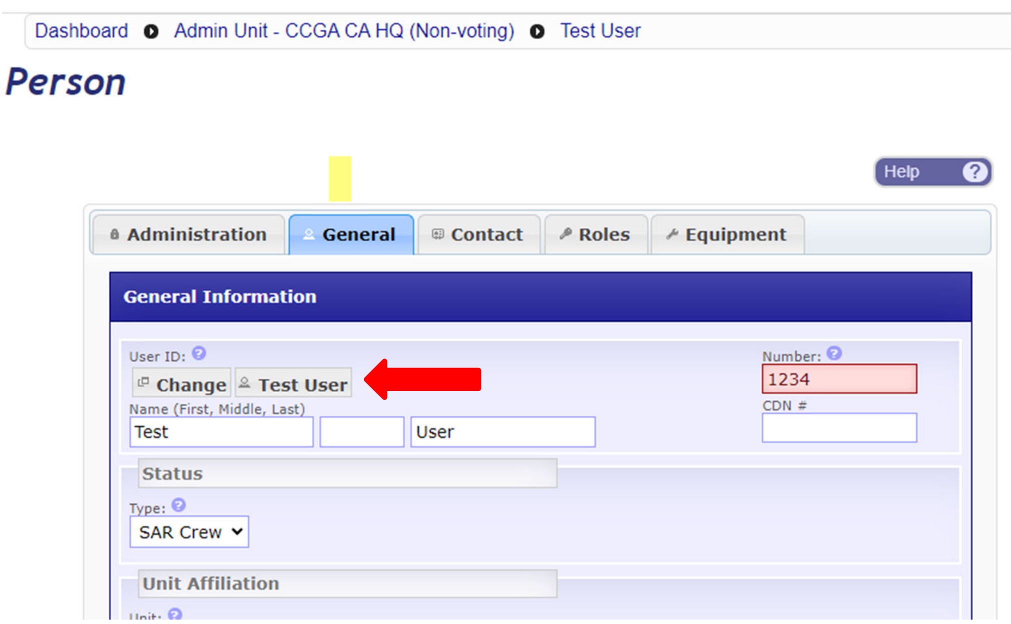
2. Click on the tab you want to make changes under. The tab you are looking at is highlighted in blue – in this case name is "Test User", see below:



3. To change contact info, your password or change your picture, click edit.

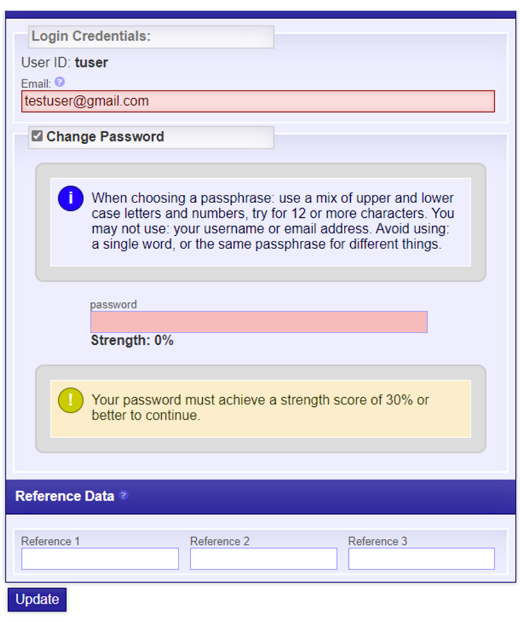
We are going to change our contact info:

4. Under the "General" Tab, click on your name. In this case "Test User"; to open the next screen.

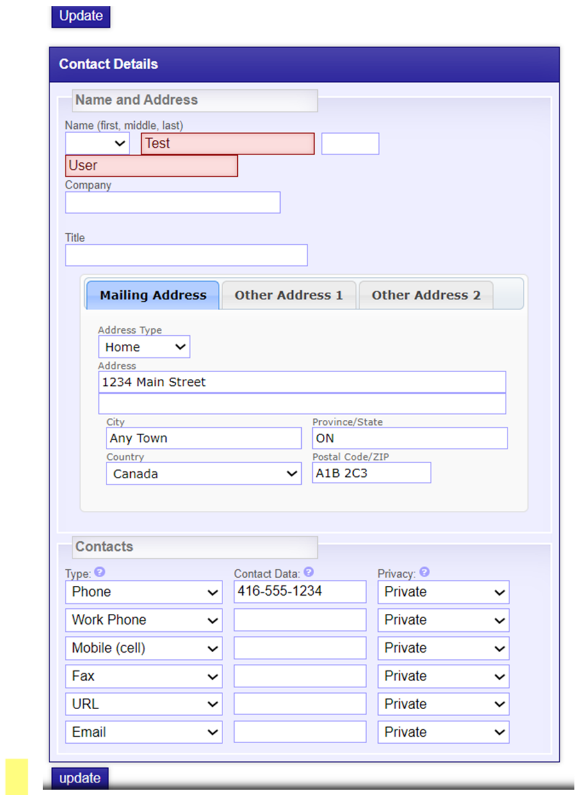


5. Click edit here to change our address, phone#, email address, password.

6. To change password, click the box beside "change password", update the password and hit "Update" anywhere on the page.



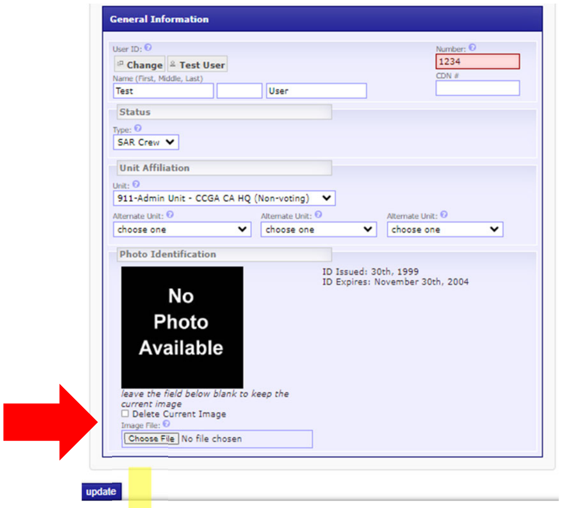
7. To change other info like address, phone etc scroll further down, make changes hit update anywhere on the page.



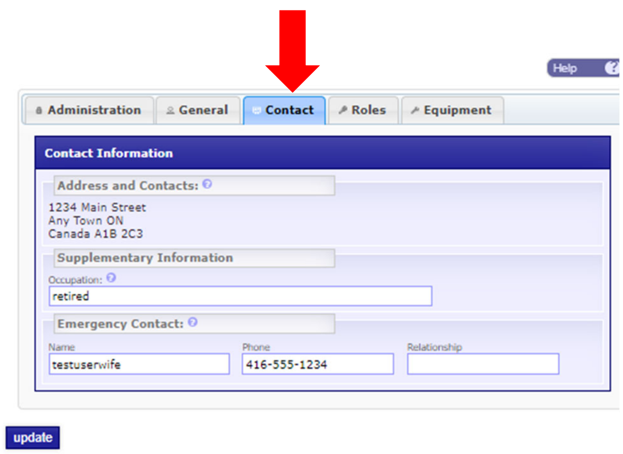
Returning to Personnel Profile Tab:

Repeat steps 1 through 4.

8. To change your profile pic, scroll down. If you want to change your picture, check “delete current image” check box, then “choose file”. The file must be saved on your device in a jpg or png file or it won’t be accepted. Make change hit “update”.



9. To update occupation and emergency contact info, click on the "Contact" Tab



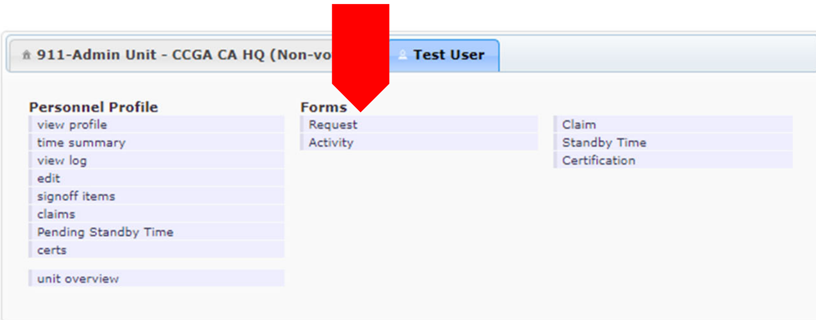
10. Make changes, hit update.

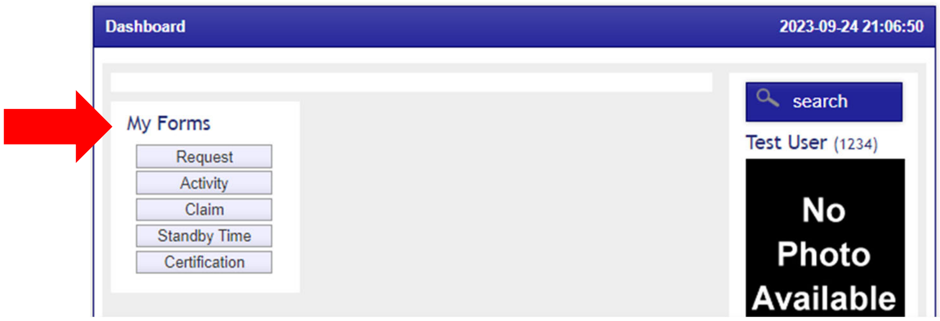
FORMS:

Forms are used to submit a request for tasking, an activity report (including training reports, ow activities, non ow activities, uploading certs, meetings etc).

Repeat step 1 to get to your Dashboard.

You can use either the quick link at the bottom left under "My Forms" or the forms section middle of page





Request for tasking is used whenever you are doing ANY CCGA activity (other than a "Mission). Even activities where no reimbursement is required to cover members for Insurance. Anything you are requesting a tasking # for MUST be followed up with an appropriate event after the tasking, even when no funds are involved.

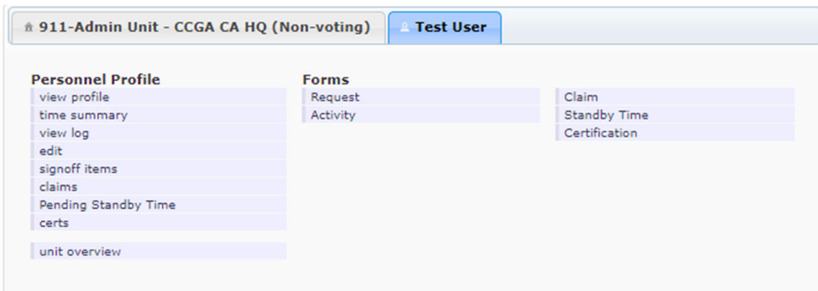
We are required to submit reports to CCG as well as activities may count towards eligible tax credit hours. (Refer to the SAR Tax Credit Policy https://ccga-ca.com/files/library/SAR_Volunteer_Tax_Credit_Policy_Final2.pdf)

Generally, Unit Leaders, Instructors and Unit Administrators would put the tasking request, however a member may need to be their own in if they are travelling for some reason – ie: trailering the asset and driving to a shop for repair, evaluation. If they are participating in a RHIOT Course for select members not the whole unit, etc.

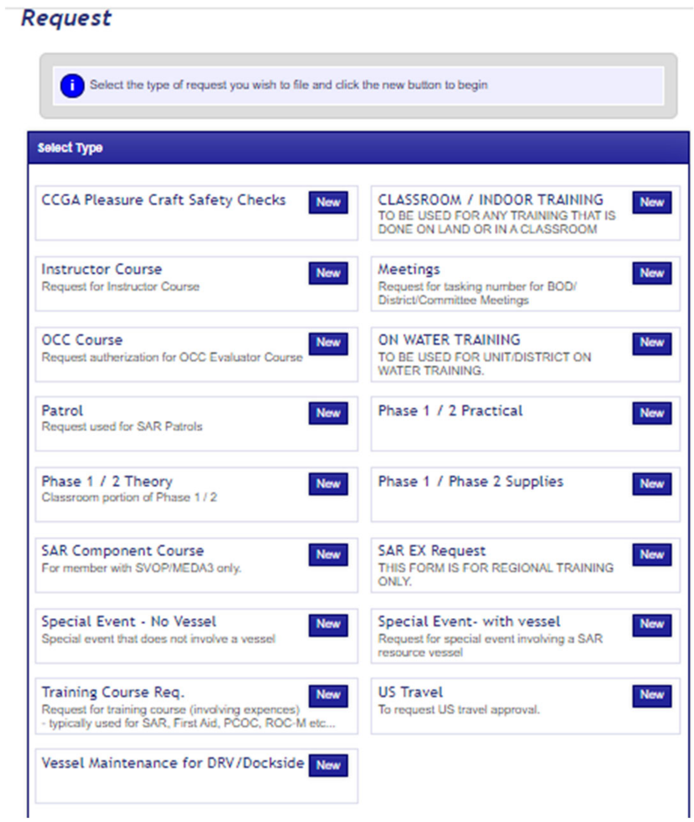
Prior to submitting this form, you should have all info including: attendees and budget required. Ideally, your request should be entered a *MINIMUM of 2 weeks* prior to the event as there are a few sign offs required before you get your TSK #. ***PHASE TRAINING MUST BE ENTERED A MIN OF 4 WKS PRIOR***.

Request for Tasking:

11. Choose “Request”



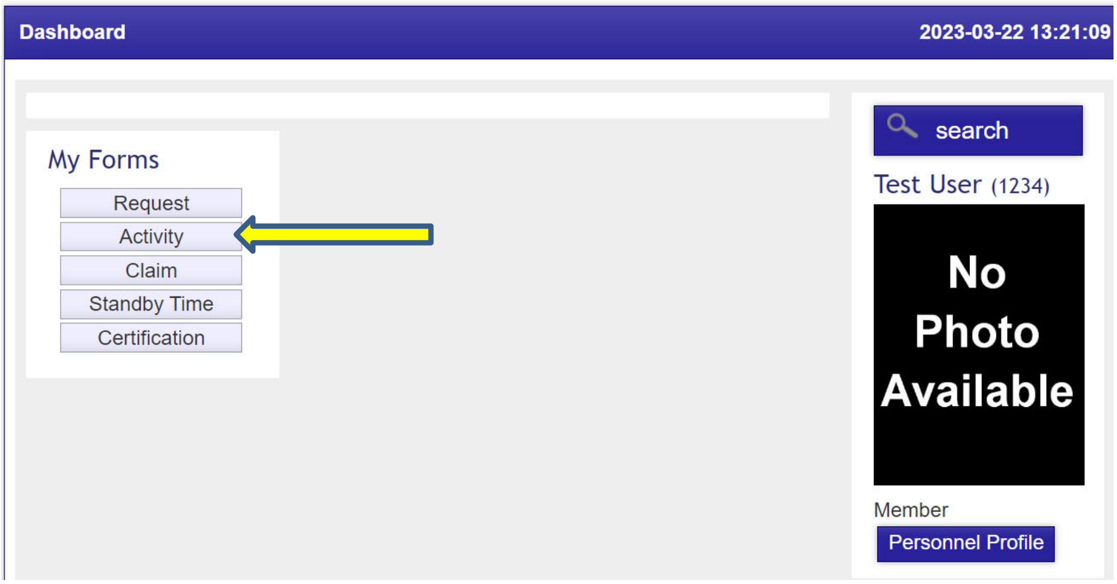
12. Choose the appropriate category and click New to open the form.



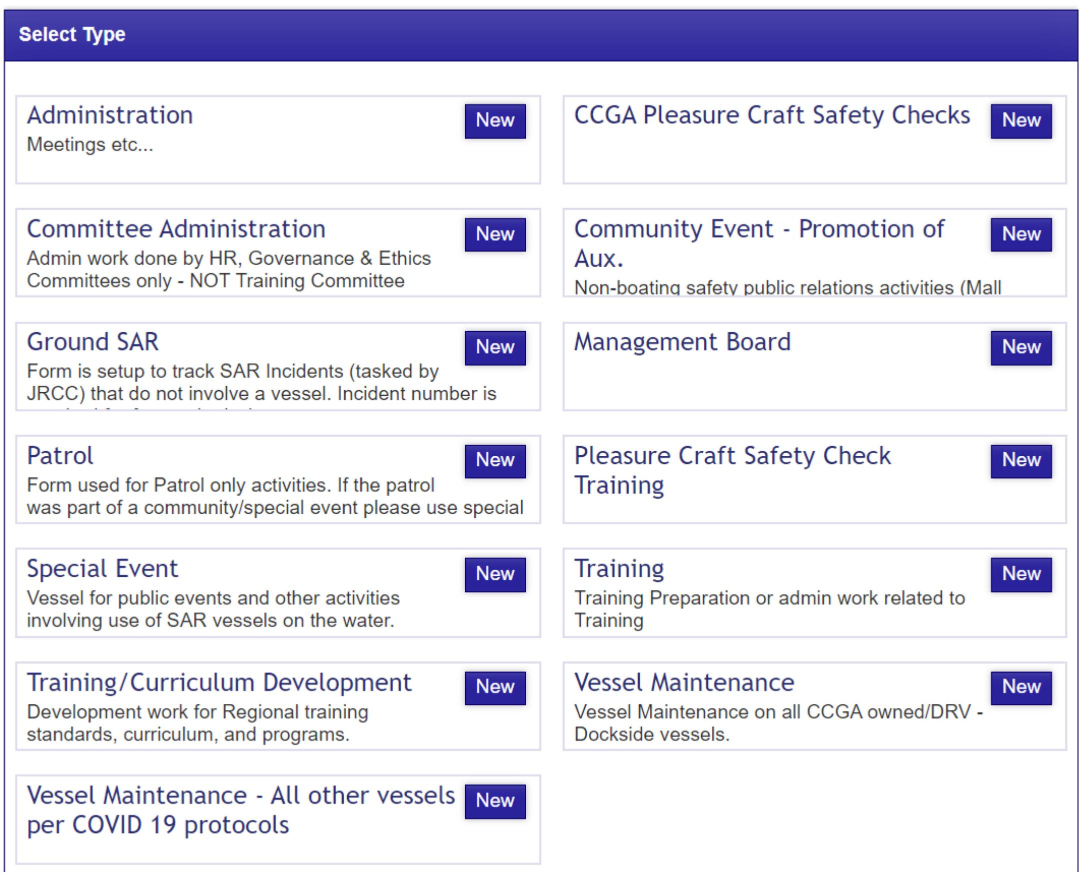
13. Make sure the form is complete. Hit Mark Complete by checking the box at the bottom of the form.
14. Hit “update”. This form will be approved by the District Director first and then go to CCG for the tasking number.
15. SMS will send an email notification to the originator once the claim has been approved and closed with the TSK # noted at the bottom.

Activity Report:

16. Choose “Activity”



17. Choose the appropriate category and click New to open the form.



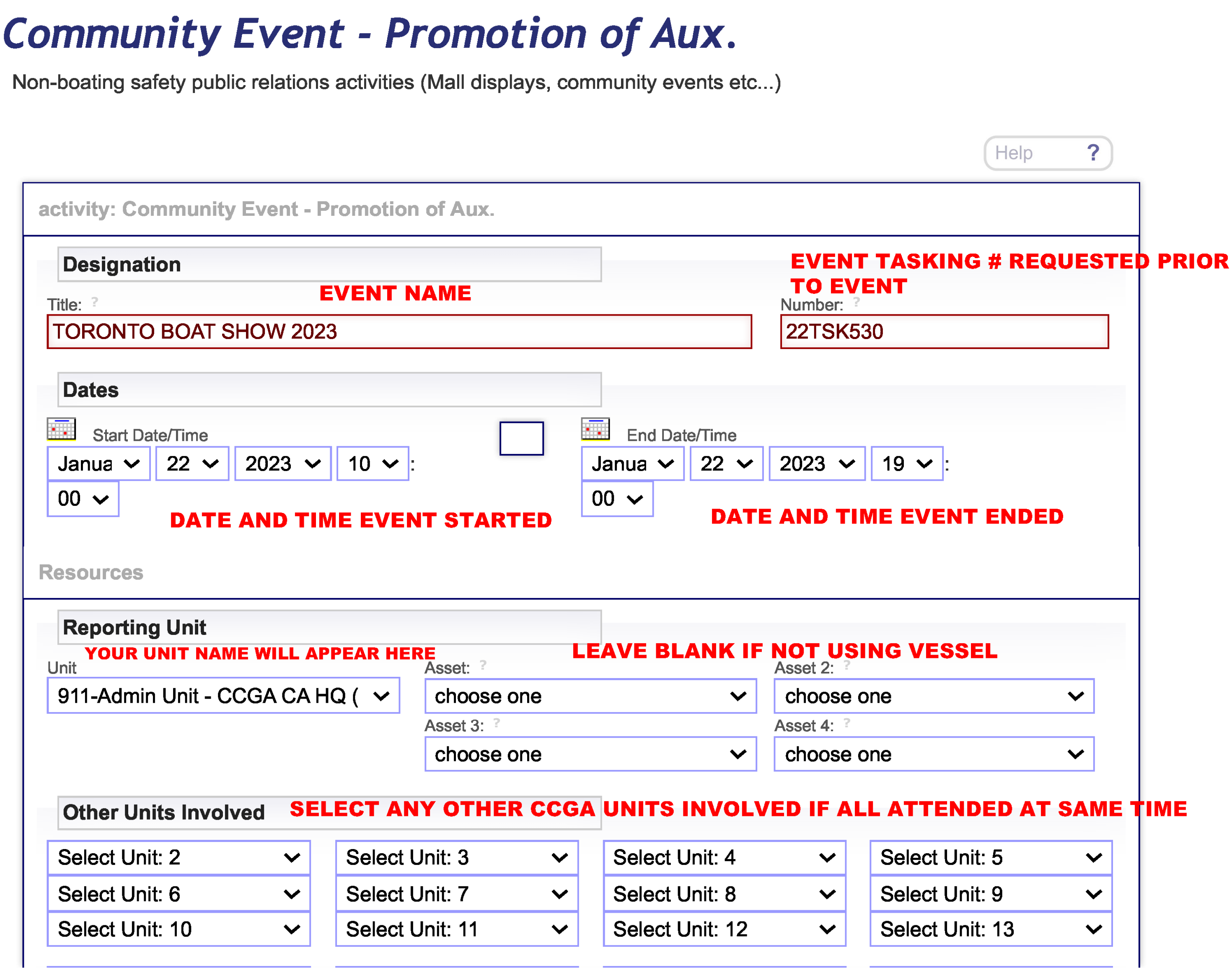
18. ***Make sure you have fully completed the form and ensure the Tasking # is***

included or the report will be rejected.

19. Scroll down and hit SAVE ONLY; review your form, if you are certain it is correct, go back in and hit "MARK COMPLETE"

The "activity form" is for authorized CCGA activity only and must include the assigned TSK#.

See Sample form below



Select Unit: 14 | Select Unit: 15 | Select Unit: 16 | Select Unit: 17

Select Unit: 18 | Select Unit: 19 | Select Unit: 20

Personnel: ?

Personnel: 911-Admin Unit - CCGA CA HQ (Non-voting)

CLICK ANY OTHER PERSONAL WHO WORKED SAME TIME IF APPLICABLE

- [x] **Test User**
- [ ] XXXXXXXXXXX
- [ ] XXXXXXXXXXX
- [ ] XXXXXXXXXXXX
- [ ] XXXXXXXXXX
- [ ] XXXXXXXXX
- [ ] XXXXXXXXXXXX
- [ ] Jennifer Stone

Requested Information

Media in attendance: Yes

WORKED BOAT SHOW BOOTH AT ENERSOURCE CEN RE

MAKE BASIC NOTE HERE

! Indicates that this form is complete and ready for review/authorization. Do this only when you are confident the all information is complete and accurate. You will not be able to make further changes to the form once it has been marked complete.

[Mark Complete]

i Store current information, but keep this record open so you can continue to add and/or edit information later. This record will not proceed to the next stage of authorization until it is marked complete.

[Save Only]

HIT THIS FIRST TO ENSURE YOU HAVE EVERYTHING NEEDED, ONCE YOU HAVE CHECKED ALL INFO IS CORRECT, HIT THE MARK COMPLETE BOX ABOVE

Claim:

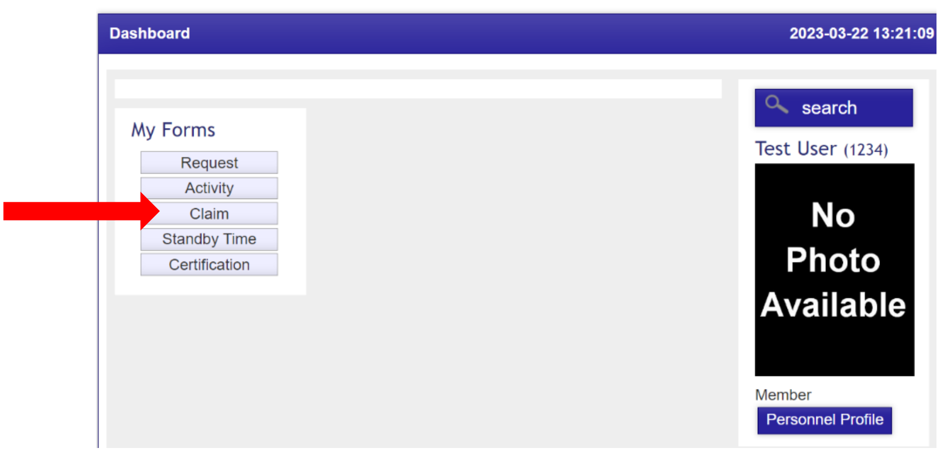
CLAIMS FOR REIMBURSEMENTS MUST BE UPLOADED WITHIN 30 DAYS OF THE AUTHORIZED ACTIVITY, REFER TO CURRENT POLICIES.

This form is used for any reimbursement other than vessel reimbursement

IE: Expenses related to and from training, meetings, group lunch for phase training, approved equipment purchases etc. All claims must have been given a tasking request # prior to the event you are claiming for.

Every quarter The National Joint Council (NJC) updates Travel Directive rates (https://www.njc-cnm.gc.ca/directive/d10/en) and HQ updates SMS, so the rates are automatically calculated when you do your claims.

20. Choose "Claim" and select appropriate Travel form – IE Ontario Travel; ***SEE SAMPLE CLAIM ON NEXT 2 PAGES***



21. Fill in all sections: Event Name, tasking #, start and end date times, etc.

a) Note Start and End date: You should put the date and time you left home and the date and time you returned home. This helps determine which meals you may be eligible to claim (if any); note if meals are included with your hotel stay or the

Claim: ONTARIO TRAVEL

Help ?

Claim: ONTARIO TRAVEL

Designation

Enter Activity Name Here

Title: 40TH (2019 AGM WEEKEND) |Training Meeting

Claim: **New**
Approval: **Not Approved**

Unit/Person

Unit: 911-Admin Unit - CCGA CA HC

Related Person: Jennifer Stone (911xxx)

If you are logged into your account, Your unit name and your name should populate here

Dates

Start Date/Time: Septen 25 2019 11 : 00

Enter date and time you left home

End Date/Time: Septen 29 2019 17 : 00

Enter date and time you returned home

Claim Details

Requested Information

PATROL/TASKING #: 19TSK150 |19TSK332

Enter tasking# here, more than 1 okay if weekend event with multiple meetings

Travel Expenses:

Vehicle

Total Mileage: 122 Km

Round trip to and from home If parked at airport then to and from airport to home

Accommodations

Rooms	Nights	Rate
1	3	$ /room/night

Meals

Breakfast	Lunch	Dinner
	3	3

Meals - refer to Regulations to confirm eligible times for reimbursements; do not include any meals that are supplied at event or included with stay

Other Expenses

Event Fee(s)	$
Meeting room rental	$ 50.00
PARKING	$ 30.00
Hotel room (3nights inc taxes)	$ 1358.10
Travel Day Per Diem	$ 17.30
	$
	$
	$
	$

Other expenses may include flights, hotel, car rental, GO Train, Via KEEP RECEIPTS

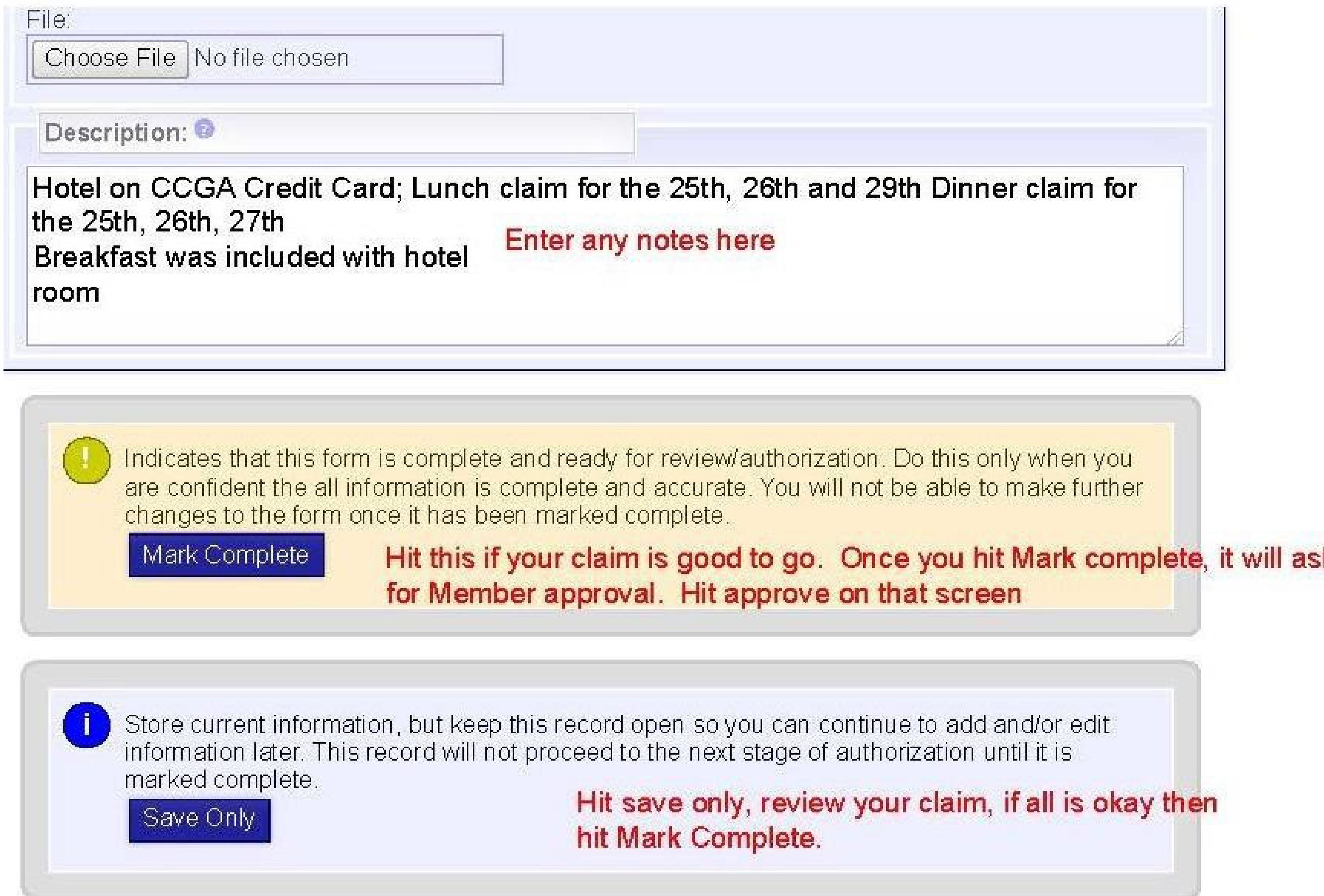
Image Attachments:

i Attach scans (JPG, GIF, or PNG) of receipts and supporting documentation as appropriate

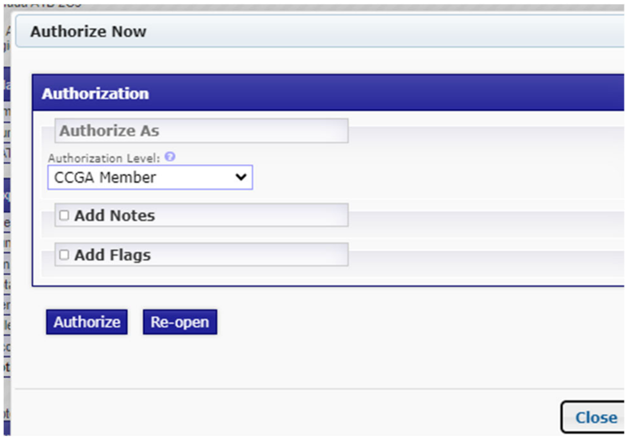
File: Choose File No file chosen

File: Choose File No file chosen

Upload receipts, flight itinerary here. You can only upload 4, then hit save only and go back in to upload more. Note must be in JPG, GIF OR PNG format, will not accept PDF file



22. Enter your claim and hit save only so you can review and confirm all information and receipts are uploaded.
23. Once you are certain that the claim is correct, hit authorize, that will move that up to Next Level for sign off. You cannot make any changes at that point.


Authorize Now
Authorization
Authorize As
Authorization Level:
CCGA Member
Add Notes
Add Flags
Authorize
Re-open
Close

Certifications:

24. Choose Certification and click the appropriate form IE PCOC

BEFORE STARTING ENSURE THAT YOU HAVE SCANNED IN OR SAVED YOUR CERT ON YOUR DEVICE IN A PICTURE FORMAT – IE JPG/PNG

25. Complete the form and upload the document and repeat steps 22 and 23.

Standby Time/OnCall Hours:

Standby time should only be entered if you are on call for SAR Calls. What does this mean?

On call means you ARE available to get to the boat in 30 mins or less; not at the movies, not at a wedding, or running errands you cannot drop to attend the call. On call means the asset is in service and ready to go, if the asset is not in service then you are not on call.

You MUST NOT have consumed drugs or alcohol if on call – see current drug and alcohol policy.

As per the SMS Broadcast Message posted March 1, 2023, standby time MUST be entered in SMS by Unit or Members on a weekly basis and Unit Leaders should be signing off weekly to ensure accuracy.

Each Member is responsible for entering their own standby times in SMS.

26. Choose Standby Time

27. Enter information – see screen below; once entered hit Mark complete

THE STANDBY TIMES SHOULD BE COMPLETED WEEKLY

This now goes into the Unit's pending standby time for the Unit Leader to sign off on; if you are the Unit Leader, your Director should sign off on your hours.

Unit Leaders/Directors: It is VERY IMPORTANT you review the hours carefully to confirm a) member was on call during period stated and b) that there are no errors. See print screens below, these are two examples of errors and should be deleted not approved.

See samples below; THESE ARE BOTH ERRORS AND SHOULD BE REJECTED NOT APPROVED.

new form

■	Start	End	Hours
Test User - 1234			
Edit Delete	March 21st, 15:00:00	March 21st, 00:00:00	-8775

new form

■	Start	End	Hours
Edit Delete	March 22nd, 15:00:00	30th, 00:00:00	0

All hours must be entered and approved by December 31st ; tax receipts for the previous tax year are issued by Feb 28th of the following year ie: 2022 Tax receipts are issued by Feb 28th, 2023.

<u>Other areas of note:</u>

On your home screen, the ribbon at the top gives you access to things like:

Document library, where you can access things like Newsletters, Membership applications, uniform guidelines, tax policies, ETC. UL's have access to more docs

Kit Shop is where you go to order CCGA items, this will take you to our current vendors.

Retired Members lists Members that had been approved for retirement status

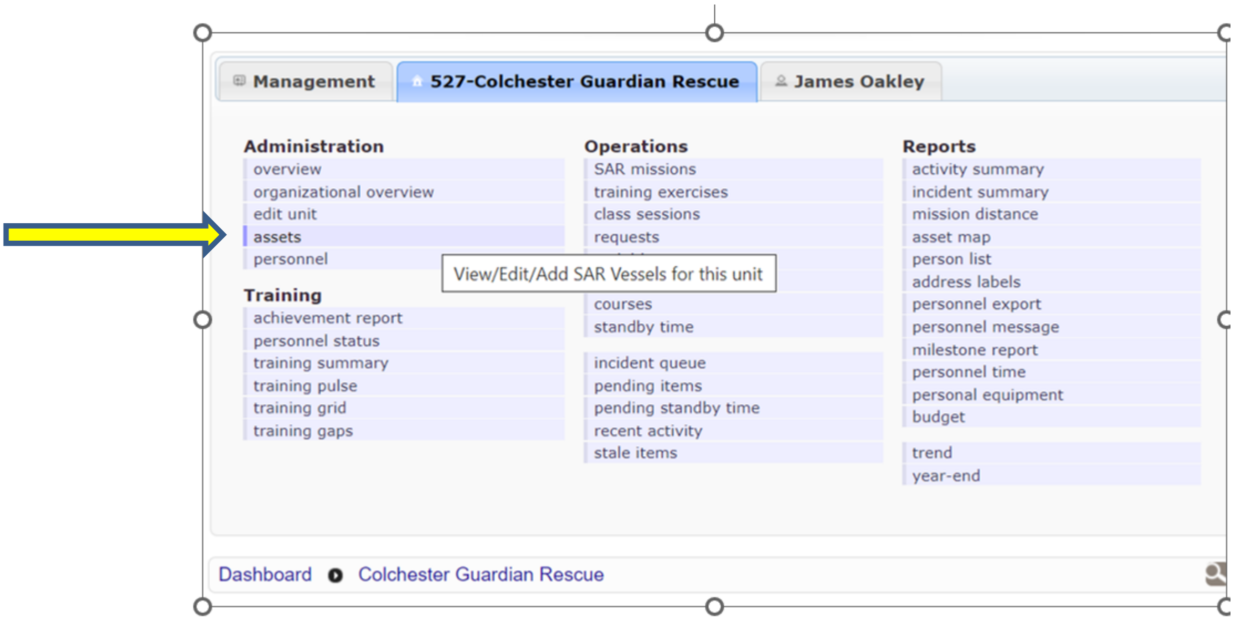
Photo Gallery – Photos from events, meetings, training exercises within our Region

Regional Contacts – Lists of our Executive, Board of Directions, Regional Managers and

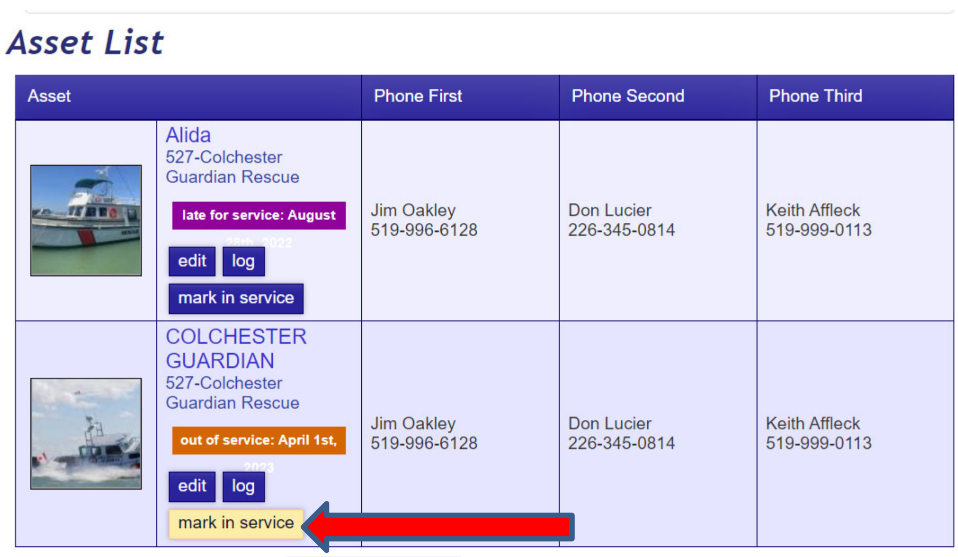
Unit Leaders/Unit Admin Members:

Marking Assets in and out of service:

28. Click on the “unit” tab. Under the Administration heading click on “assets”. A listing of all vessels for your unit will come up at the bottom of the page.



a) If you are marking the vessel in service for the season, click the “mark in service” button. Please make sure all emergency contact for the unit appears to the left and are correct.



b) If you are marking the vessel out of service, click the “mark out service” button. A pop up box will appear to enter times/dates of when the vessel is planned to be put out of service and when it is expected to return to service.

Updating Contact or Equipment details for the Vessel:

29. To update the contact information or equipment aboard the vessel click on the unit tab. Then select assets from that menu. Choose the appropriate tab for the details you would like to edit, make sure to hit the update button at the bottom of the page once you are done.

    Make sure the address is correct for the vessel owner address as this is where SMS will pull that information from for payment when you submit an on-water training report or incident report.

Unit Overview – Contact Information for the Unit:

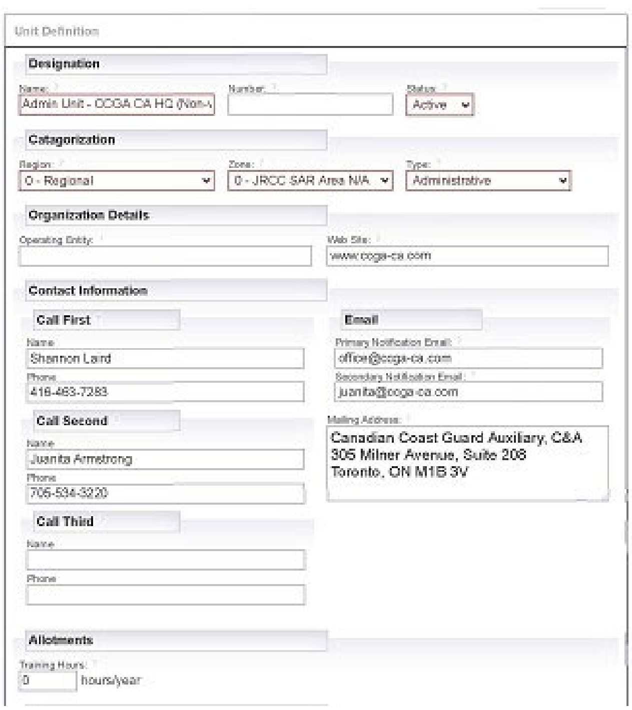
It is the responsibility of the unit leader to ensure all contact details on the unit overview page are kept up to date.

a. Starting from your "dashboard" click on the units tab.

b. Select "edit unit" under the Administration heading.

c. Make the necessary changes to the unit contact information.

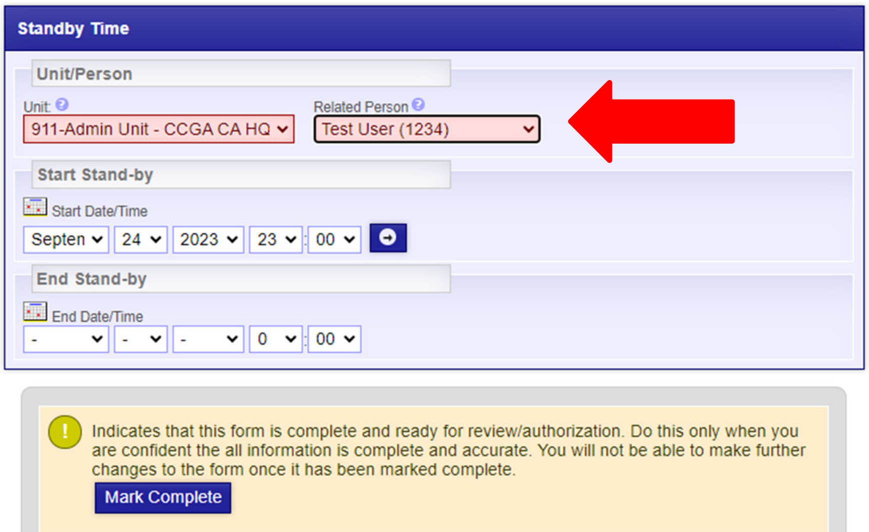
d. Hit the "update" button at the bottom of the page.



Note the primary and secondary email contacts entered here are where any report notifications from SMS will go to.

Inputting Standby Time for your members:

The form was designed to have each member enter their own time, however if the Unit Leader needs to enter the time for his/her members they may do so by following the steps 26 and 27 and Click on Related Person, select member from a drop down menu and enter the times accordingly. Then follow the step 27 and hit mark complete.



Unit Reports

Personnel List

The person list can be used as a tool to gather contact information on the members of your unit.

To get to the person list from the dashboard just click on the personnel list button.

Personnel Status

The personnel status report can be used to keep track of sea time for mission and training, and current certifications in the system for each member of the unit.

To get to the personnel status report from the dashboard just click on the personnel status button.

Pending Items

The pending items report can be used to see any forms that have been submitted by the unit and what their current status is within the workflow (sign off process).
To get to the pending items area just click the pending items button from the dashboard page.

"Open" status means that is an incomplete form and has not been submitted or has been rejected.

If a form is pending the unit level/leader click the view button beside the report. Review the information is correct and scroll to the bottom of the page and hit the "Authorize" button. If the report contains error, you will need to reject/reopen the form and provide details on the information that needs to be amended.

Rejected Items

When a form is rejected it means that it has been reopened for the originator to make corrections or it is not an approved activity.

When an item is rejected the SMS will send an automated email to the originator of the form.

The form will either need to be amended as per the note at the bottom for the reason why it was rejected or be deleted.

Reviewing Closed Reports/Forms

To review any of the forms that have been closed (completed) in the SMS you will need to click on the unit tab at the top. Under the operations heading choose the type of form that was completed for example SAR Missions and select a date range. This will bring up a list of SAR Missions submitted for the unit. You can select multiple form types to view them as one list.

Training / Courses

On Water Training

All on water training activities (Phase 1 / Phase 2 Courses and regular crew training) are submitted using the Training Exercise form. The form can be accessed from the dashboard. This is the responsibility of the Unit Leader. If it is a Phase 1 /2 Course he/she must add the instructors that were on board.

Phase 1 /2 Theory Training

The theory (classroom) portion of the Phase 1 / 2 Courses gets entered into the SMS by the instructor once all the in class course content is completed. It is submitted using the Course form, which can be accessed from the dashboard.

Classroom Training

Any authorized classroom training that is not part of the P1/P2 course is entered into the SMS using the Classroom form which can also be accessed through the dashboard.

Phase 1 / Phase 2 Course Requests

There are a few different request types for the P1/P2 Courses.
There are separate requests for both theory and practical portions of the course and one for the training manuals/ supplies. A request for authorization on the theory portion of the course should be submitted prior to the request for the manuals/supplies. When entering the request for the manuals please submit it well in advance as they are being shipped from Toronto.