About This Field Guide

Disaster Action Teams (DATs) are groups of trained Red Cross disaster responders that provide immediate disaster relief services to those affected by disasters and to emergency workers responding to the incident.

When the American Red Cross Cascades Region is notified of a disaster, the initial call goes to the duty officer. The duty officer has the responsibility of ensuring a timely response to emergencies by assessing emergency needs and deploying responders, primarily DATs, as needed.

The duty officer performs the role of both supervisor and dispatcher. This means that a large portion of the duty officer’s job is to support the Disaster Action Team (DAT) responders, answer questions, provide information, act as a liaison, and ensure proper documentation is completed. In most situations, it will be the lead responder at the scene that take the lead in assessing the emergency and providing care with the duty officer providing support and guidance.

The goal is for the DAT members and the duty officer to work as a team to provide the best possible service to our clients in an efficient and effective manner.

The Manager On Call (MOC) is available to support the duty officer with guidance and to activate additional resources for non-routine operations.
# Table of Contents

- **About This Field Guide** ................................................................. ii
- **Table of Contents** ........................................................................ 1
- **Substantive Updates** ................................................................. 2

## Section 1: Overview & Organization ........................................... 3

1.1 DAT Positions ................................................................. 3
1.2 DAT Training Courses ..................................................... 3
1.3 Duty Officer ................................................................. 4
1.4 Manager On Call ............................................................ 4
1.5 Response Overview .......................................................... 5
1.6 Typical DAT Response ....................................................... 6
1.7 Equipment ..................................................................... 7
1.8 Confidentiality ................................................................. 8

## Section 2: Disaster Finance ......................................................... 9

2.1 Types of Financial Instruments ............................................. 9
2.2 Receiving Financial Instruments ........................................... 9
2.3 Tracking issued financial instruments ................................... 11
2.4 Lost or missing financial instruments ................................... 11

## Section 3: Request and Assessment ........................................... 12

3.1 Request for Services ........................................................... 12
3.2 Lead Responder ............................................................... 12
3.3 Performing Needs Assessment ............................................ 12
3.4 Hot and Cold Responses ..................................................... 12
3.5 Shelter Conversation Triggers .............................................. 13
3.6 Contacting Clients ............................................................. 13

## Section 4: Deployment ............................................................... 14

4.1 DAT Schedule ................................................................. 14
4.2 Volunteer Connection ......................................................... 14
4.3 Cannot Deploy Enough Responders ................................... 14
4.4 Deploying the Responders .................................................. 14
4.5 Safety .......................................................................... 16
4.6 Additional People ............................................................. 16

## Section 5: On Scene ................................................................. 17

5.1 Arriving On Scene ............................................................ 17
5.2 On Scene Flow ............................................................... 17
5.3 Identify the Primary Client .................................................. 17
5.4 Verifying Primary Client Identity and Address .................. 18
5.5 Verifying number of families ............................................ 18
5.6 Determine Client Needs and provide assistance ............... 19
5.7 Client Interview .............................................................. 19
5.8 Collect Case Information .................................................. 20
5.9 Client Consent ............................................................... 21
5.10 Service Only Cases .......................................................... 21

## Section 6: Support Resources .................................................... 23

6.1 Health Services (DHS) ....................................................... 23
6.2 Disaster Mental Health (DMH) ............................................. 23
6.3 Public Affairs (PA) ............................................................ 23
6.4 Language Line ............................................................... 24

## Section 7: Direct Client Assistance .......................................... 25

7.1 Determining Direct Client Assistance ................................ 25
7.2 Locating a Hotel ............................................................... 25
7.3 Client Assistance Cards .................................................... 26
7.4 Lost/Stolen Client Assistance Cards .................................. 26

## Section 8: Sample Forms ........................................................ 27

8.1 Client Intake Worksheet (top half) ................................. 28
8.2 Client Intake Worksheet (bottom half) ............................ 29
8.3 Summary of Client Assistance - English .......................... 30
8.4 Summary of Client Assistance - Spanish .......................... 31

## Section 9: On-Scene Wrap Up .................................................. 32

9.1 On Going Communication with Clients ............................ 32
9.2 Clear the Scene ............................................................... 32

## Section 10: Creating a case in CAS 2.0 ................................. 33

10.1 Using the CAS 2.0 Mobile Portal .................................... 33
10.2 Using the CAS 2.0 Full Version ...................................... 35

## Section 11: Special Circumstances ......................................... 38

11.1 Disasters involving Tents .................................................. 38

## Appendix A: Positions Referenced ......................................... 39

## Appendix B: Oregon / Washington County Maps ................. 40

## Appendix C: Disaster Program Manager Map ..................... 41

## Appendix D: Program Managers by County ....................... 42

## Appendix E: Immediate DCA Road Map ............................. 43

## Appendix F: Client Verification Chart ................................. 44

## Appendix G: DCA Price List ................................................... 45

## Appendix H: Temporary Lodging Chart ............................. 47

## Appendix I: Client Consent - English ................................. 49

## Appendix J: Client Consent - Spanish ................................. 50
Substantive Updates

September 2015: On September 30 the Red Cross rolled out the new Direct Client Assistance Model. There are updates throughout the entire field guide to align with this model.
Section 1: **Overview & Organization**

1.1 **DAT Positions**

- **DAT Applicants** are new volunteers that are working on their volunteer onboarding process and completing training.

- **DAT Trainees** are newer DAT members that have completed the DAT Workshop and are participating in the on-call DAT program.
  - New DAT Trainees will receive a Red Cross Vest to wear on DAT calls.
  - All DAT members should bring their copy of the DAT Field Guide with them to all responses.

- **DAT Workers** are DAT members that have participated in multiple responses, carry forms and other supplies, and help mentor DAT Trainees on responses.
  - New DAT workers members will receive a Red Cross t-shirt; the vest still has to be worn on DAT calls.
  - DAT workers are expected to bring to responses (all provided by the ARC):
    - DAT Packets
    - Client assistance cards
    - Blankets
    - Stuffed Animals
    - Comfort Kits

- **DAT Captains** function as an experienced responder and help build their team. DAT captains are expected to bring the same materials to all responses as a DAT Worker is.
  - DAT captains will receive a magnet for their car to identify them as Red Cross.

- **DAT Coordinators** supervise and support DAT captains. In the absence of a DAT coordinator, the disaster program manager fulfills that responsibility.

1.2 **DAT Training Courses**

**DAT Trainee**

Required prior to appointment:

- DAT Workshop – Classroom

**DAT Workers**

Required prior to appointment:

- CAS: Overview Video - https://cas.communityos.org/cms/node/138
• CAS: Creating a Case Video - https://cas.communityos.org/cms/node/138
• CAS: Recovery Planning Video - https://cas.communityos.org/cms/node/138

Recommended courses to pursue after appointment:

• Adult First Aid/CPR/AED - Blended or Classroom
• Basic Food Safety - Online
• Casework and Recovery Planning Fundamentals - Online
• Fundamentals of Disaster Assessment - Online
• Operations Planning Fundamentals - Online
• Incident Reporting Fundamentals - Online
• Shelter Fundamentals - Online
• Shelter Fundamentals Exercise – Classroom
• Psychological First Aid - Classroom
• FEMA IS 100 - Online
• FEMA IS 200 - Online
• FEMA IS 700 - Online
• FEMA IS 800 - Online

DAT Captain

Required prior to appointment: (in addition to those of a DAT Worker)

• Psychological First Aid - Classroom
• Fundamentals of Disaster Assessment - Online
• Shelter Fundamentals - Online
• Basic Food Safety - Online

Recommended courses to pursue after appointment: (in addition to those of a DAT Worker)

• Disaster Frontline Supervisor and Disaster Frontline Supervisor Simulation
• Shelter Management - Online
• Fundamentals of Chapter Disaster Operations Management - Classroom

1.3 Duty Officer

The duty officer has the responsibility of ensuring a timely response to emergencies by assessing emergency needs and deploying responders as needed.

The duty officer performs the role of dispatcher and regional supervisor. This means that a large portion of the duty officer’s job is to support the Disaster Action Team (DAT) responders, answer questions, provide information, act as a liaison, and ensure proper documentation is completed. In most situations, it will be the lead responder at the scene that take the lead in assessing the emergency and providing care with the duty officer providing the DAT members support and guidance.

1.4 Manager On Call

The Manager On Call (MOC) is available to support the duty officer with guidance and activate additional responders for non-routine operations.
1.5 Response Overview

Overview of a Disaster Notification

Disaster happens.

Red Cross notified.

Notification from a first response agency.
Notification from the client or general public.

Verify disaster.

Situation Assessment

Initiate Service Delivery
1.6 Typical DAT Response

Typical DAT Response

Duty Officer updates the event in DCSOps from when the call came in and continues to update it throughout the response.

Duty Officer decides to dispatch DAT members.

Duty Officer identifies available DAT members using DCSOps.

Duty Officer looks up contact information in DCSOps and contacts responders.

Duty Officer designates one responder as the lead responder.

DAT members deploy and notify Duty Officer when they are on scene.

DAT conducts needs assessment and initiates casework.

DAT member interviewing the client confers with the Lead Responder regarding financial assistance.

DAT member explains assistance provided to client.

Duty Officer informs PA of response.

DAT members inform Duty Officer when they are leaving the scene.

Duty Officer completes incident report, sends response notification email and posts on Volunteer Connection.

DAT member completes final entry of case information into CAS.

This chart is meant to outline a typical single family DAT response when there is no question of providing financial assistance for lodging vs providing mass care services.

Once on scene, DAT members may need DMH or DHS volunteers activated and will request that support from the Duty Officer.

DAT members will create their own CAS event and will enter their cases into CAS. If they utilize the mobile version of CAS on scene, there is still additional data that needs to be entered when they get home.

If it is the lead responder that interviewed the client they confer with the Duty Officer.

Either way, the Lead Responder needs to ensure that the Duty Officer knows about the assistance provided so that the Duty Officer can complete the response notification.
1.7 Equipment

In order to be ready to respond, there are basic supplies DAT members need to have ready. Some supplies are provided by the Red Cross and others are a personal responsibility for DAT members.

Personal Supplies

- Clipboard
- Pens (black ink preferred, not required)
- Flashlight and/or headlamp (easier to do your paperwork with hands free lighting)
- Cell phone (highly recommended, not required)

Please note: When the duty officer contacts DAT members, it is from their own cell phone or land line; the calls do not come from just one Red Cross number. DAT members should be sure that the number they have listed in Volunteer Connection can accept calls from unknown callers.

Red Cross Issued Supplies

- Vest
- DAT Field Guide
- Red Cross Badge
- Issued to DAT captains and workers:
  - DAT related forms (including DAT packets and client assistance cards)
  - Blankets
  - Comfort Kits
  - Stuffed Animals

Vehicles

Red Cross vehicles that are positioned at local locations may be used for DAT responses. The two main points to consider in deciding to use a Red Cross vehicle are:

- Is it effective to travel to the vehicle, get the vehicle and then travel to the client? Think of every minute added to the response time as more time the client is at the scene of a disaster, especially in the middle of the night or standing out in inclement weather, waiting for disaster relief assistance from the Red Cross.
- Is the vehicle available? The duty officer can access the vehicle calendar on the Cascades Region Neighborhood to determine availability.

All individuals driving Red Cross vehicles should have completed the Authorized Driver process prior to driving. A quick way to know if someone is authorized driver is to ask if they have a PIN for fueling vehicles.

Attire

All DAT members must wear clothing appropriate for the weather, closed toe shoes, and a Red Cross vest when responding to a disaster. Every effort should be made to ensure that attire will not confuse either the public or local officials. Uniforms or other insignia which might cause confusion should not be worn on responses. In addition, the following items should not be worn:
- Tight or revealing garments, including short-shorts, halter tops, see-through garments and bathing suits.
- Garments or accessories bearing offensive or inappropriate slogans.
- Garments bearing product endorsement.
- Thongs, flip-flops or any other footwear that is unsafe, unprofessional or inappropriate for disaster tasks.
- Torn or dirty clothing.
- Fishnet reflective vests in colors other than red or white.
- Any Red Cross apparel which bears design elements other than the official American Red Cross or American Red Cross disaster signature, including “job” T-shirts.

American Red Cross name badges and apparel should be removed when a disaster action team member is not on-duty and should never be worn while engaging in any activity that may reflect adversely on the American Red Cross, including, but not limited to, engaging in illegal activity or in political activities. Red Cross disaster workers are considered on-duty at any time they are engaged in official activities on behalf of a Red Cross disaster response. This on-duty definition applies exclusively to attire and identification standards. It does not create or negate other statutory or corporate definition of on-duty with respect to eligibility for worker’s compensation, benefits and/or liability coverage for activities.

The possession of weapons (guns, knives, clubs, explosive devices, etc.) is strictly prohibited in the workplace, including any Red Cross identified vehicle or building.

1.8 Confidentiality

The relationship between the Red Cross and the persons who come to us for service is confidential. Safeguarding this relationship is an essential part of the organization’s obligation to the people and communities we serve. The principles of confidentiality will be observed by all Red Cross employees and volunteers in obtaining, protecting and releasing information about clients, recognizing that such information is given to workers as representatives of the Red Cross and is to be used only for the purpose of providing Red Cross services. The Red Cross complies voluntarily with the spirit of the Privacy Act of 1974.

All information obtained under the client-agency relationship is considered confidential. The term “client” as used in these regulations refers to any individual or family who seeks Red Cross assistance in recovering from a disaster. A client relationship is established by the individual’s or family’s contact with the Red Cross, whether or not any assistance is given.

The Red Cross caseworker should request no additional information other than what will be needed for the service that may be given. Citizenship is not a pre-requisite for Red Cross disaster assistance; clients will not be questioned about their citizenship status, nor asked to produce birth certificates, immigration papers, passports, social security cards or similar documents that could be interpreted as being used to identify the nationality or immigration status of persons seeking Red Cross assistance.

The Red Cross must have consent for the release of specific information to a specific agency or written evidence that the individual or family has given such agency or agencies permission to request that information from the Red Cross.
Section 2: **Disaster Finance**

2.1 **Types of Financial Instruments**

The American Red Cross utilizes one primary financial instrument for providing financial assistance to its disaster clients; the client assistance cards (CACs).

**Client Assistance Cards**

Client assistance cards are a prepaid card that clients can use at nearly any retail location that accepts MasterCard®. Client assistance cards are loaded with a predetermined amount of funds before it is used. The card will also permit reloads so that the original card can have value added to it if a Red Cross responder or caseworker determines additional help is needed.

2.2 **Receiving Financial Instruments**

When an individual is promoted from a DAT Trainee to a DAT Worker they will have demonstrated a basic mastery in performing an initial client interview, documenting necessary information to verify immediate disaster-caused needs, and provide justification and for providing assistance (financial, contact information for community resources, or referrals) to disaster clients. Upon promotion to a DAT Worker individuals will be issued a set of financial instruments that they are accountable for.

**Client Assistance Cards**

Client assistance cards are issued in bundles of 5 CACs per packet. Financial instruments are issued by individuals that are responsible for maintaining inventory of financial instruments cannot perform any other role related to providing direct client assistance. When receiving CACs, responders should verify that the proxy numbers on the Client Assistance Card Charge-Out Record (Form 1032) match the proxy numbers visible through the envelope window. Once all proxy numbers are verified the responder receiving the cards should sign in the box labeled “Signature of worker receiving cards”. The individual responsible for maintaining inventory of the financial instruments will sign in the box labeled “Signature of FSI worker issuing cards”. A copy of the charge-out record will be made and the original will be returned to the responder to track the CACs as they are issued to clients. Responders are accountable for the funds they issue on a CAC. A responder is not allowed to give their CACs to another responder to issue without completing a charge out record to transfer them.

The maximum number of client assistance cards that a single responder may receive is 10. In areas where there is a significant amount of response activity, responders may be issued two bundles of 5 CACs to receive a total of 10 CACs. When a responder has issued all of the CACs from a bundle they may submit their completed Form 1032 for a new bundle of 5 CACs. In general, new responders will only receive five (5) CACs initially.
Sample Client Assistance Card Envelope

Sample Client Assistance Card Charge-Out Record (Form 1032)
Issuing financial instruments remotely

In some instances there may not be a local individual identified that is responsible for maintaining inventory of financial instruments, or responders may live a significant distance from the location where these individuals are located. When this occurs, responders are to contact their disaster program manager and request that CACs be shipped to them. Financial instruments will generally arrive within a week via FedEx if the responder’s home address is on file or via US mail if being sent to a PO Box. Upon receipt of the financial instruments, the responder is to send an email to the Direct Services Support Manager indicating the proxy numbers of the client assistance cards received.

2.3 Tracking issued financial instruments

DAT members are responsible for maintaining accurate records of client assistance cards in their possession. Using appropriate form, update the Client assistance Card Charge-Out Record with the case name and case number from CAS 2.0 (see examples on page 10). Random audits of CACs will be performed throughout the region in addition to the required semi-annual audit of all financial instruments. During these audits responders will be asked to report on the CAC proxy numbers in their possession. When completed charge-out records are returned, they will also be audited against the regional inventory used to track financial instruments.

2.4 Lost or missing financial instruments

If at any time a responder discovers that they are missing one or more financial instruments (a single CAC envelope or more), they are to report the missing instrument immediately to their disaster program manager and provide the following details.

- CAC
- Date of last verified possession of the missing instrument

The disaster program manager will then report this information to the Direct Services Support Manager to ensure that missing instruments are updated in the regional inventory and if a CAC, the card is declared as lost and unable to be activated.
Section 3: Request and Assessment

3.1 Request for Services
When the duty officer receives a request for Red Cross assistance from a government agency, the duty officer then contacts the closest on-call DAT members. The on-call DAT members are then dispatched to the scene to assess the unmet disaster caused needs and provide assistance to the clients. If the request for assistance does not come from a government agency, the duty officer will verify the incident before dispatching DAT members.

3.2 Lead Responder
One DAT member assumes the role of the lead responder as assigned by the duty officer. This is generally the most experienced DAT member, and who is generally a DAT Worker or a DAT Captain.

Lead responder responsibilities:
- Guide newer team members in providing assistance;
- Supervise team members;
- Coordinate closely with the duty officer;
- Maintain primary contact with the Incident Commander;
- Requests additional Red Cross resources through the duty officer.

3.3 Performing Needs Assessment
The duty officer will try to verify the location of clients before dispatching DAT members. Some response agencies call Red Cross before the verification of displaced persons as part of their command structure. However, there will be times that it cannot be obtained until a DAT member is on scene. If this is the case, the duty officer still should dispatch DAT members, have them conduct an initial assessment, and report back to the duty officer.

Once on scene, the lead responder, as identified by the duty officer, should try to determine:

- Are additional DAT members required? (Factors include what is the potential client count: how many families are involved?)
- Has a first response agency (most commonly the fire department) declared the structure livable or unlivable?
- Are support teams needed on-scene? Which ones (health services, disaster mental health, public affairs)?
- Is additional equipment required? (i.e., ERV, DAT packets, comfort kits, blankets)
- Is an evacuation site needed? In the case of multi-family dwellings, can an evacuation point or central meeting point be provided by the complex?

3.4 Hot and Cold Responses
DAT members may be activated to respond to a variety of situations. The terms “hot” and “cold” have different meanings to different agencies so these are terms only used internally.

Hot responses are generally where the clients are expected to still be on scene and will need immediate assistance with their disaster-caused needs.

Cold responses are generally where we were asked for assistance sometime after the disaster occurred or when a client requests additional assistance.
It is not uncommon for cold responses to be completed by appointment with the client when there is not a need for a response within the next couple of hours.

3.5 **Shelter Conversation Triggers**

A shelter is any congregate facility the Red Cross is opening for people to have a safe place to go. If a local jurisdiction is calling it an evacuation site or warming center for stranded motorists, it still falls within the definition of a shelter in this document. Anytime any of the disasters the Red Cross is responding to meets one of these triggers, the lead responder must contact the duty officer so that the duty officer can have a conversation with the MOC regarding potentially opening a shelter before DAT members make commitments for direct client assistance. Meeting one of these triggers does not guarantee that the Red Cross is opening a shelter; it just means that there needs to be a conversation to discuss if it is warranted.

- more than 7 families or 25 people are in need of lodging/shelter;
- evacuations are taking place;
- the number of impacted individuals or housing units cannot be determined;
- an emergency management, fire department, or law enforcement agency is specifically requesting that the Red Cross open a shelter;
- communities are isolated and cut off from their normal transportation routes;
- road closures or severe weather situations in which assistance is needed for stranded motorists.

3.6 **Contacting Clients**

If anyone has to contact a client directly, it is highly encouraged that they block the caller ID on their phone. On most phones, dialing *67 and the ten digit number will block the caller ID for the one call. DAT members should never give their personal cell phone number to clients; always provide 1-888-680-1455 for 24-hour assistance.
Section 4: Deployment

4.1 DAT Schedule

DAT schedules are maintained in DCSOps (www.dcsops.org). Every responder has access DCSOps using the same username and password as they would use for Volunteer Connection. The DAT Coordinators and disaster program managers are responsible for ensuring that responders are identified in the on-call schedule. If a DAT is unable to access DCSOps to update their on-call availability they should contact their DAT Coordinator or disaster program manager.

4.2 Volunteer Connection

Once the duty officer identifies the on-call DAT members, they look up their contact information in DCSOps and/or Volunteer Connection. DAT members need to keep their contact and phone call preference information current in Volunteer Connection so that the duty officer can reach them during their on-call period.

4.3 Cannot Deploy Enough Responders

In most cases, the duty officer will be able to deploy enough responders to the incident using the on-call schedule in DCSOps. However, should no responders be listed as on-call at the time, or a trainee is the only responder available, the duty officer will then contact responders that are listed in the flex schedule (See flex responders).

Flex Responders

Responders have the option in DCSOps to provide days of the week and times that they are generally available. Flex responders are not expected to drop everything and respond, they are indicating potential availability should additional responders be needed or if the duty officer cannot reach the on-call responder.

Find Off-Duty Responders

In the unlikely case that the responders listed as on-call do not answer, no responders have been scheduled for that time, or only a trainee is scheduled, the duty officer may have to contact off-duty responders. The duty officer should only contact off-duty responders between the hours of 7AM and 9PM unless they are listed in the flex schedule in DCSOps. DAT members listed in the flex schedule will only be contacted if the scheduled responders are not reachable, cannot respond, or if additional responders are needed (the 7AM-9PM restriction does not apply in this case).

If the duty officer cannot find any responders, regardless of the time of day, the duty officer will contact the DAT Coordinator or disaster program manager responsible for that county (see list under Positions Referenced section) to see if they can respond, or if they know of a likely available responder. If there are no other options, the duty officer will consult with the MOC about initiating a remote procedure.

4.4 Deploying the Responders

- How Many Responders to Deploy - A minimum of two responders is highly desired. For many reasons only one responder is dispatched if it is the only option for providing service delivery to clients. If only
one responder is available, that solo responder must meet with clients while first responders are still on the scene or in a public place.

- The duty officer will designate the lead responder, who acts as the on-scene supervisor, and communicate this to the other responders.
- The duty officer will consider the number of cases to determine the number of responders needed. The duty officer will use their best judgment for expediting the paperwork. Each case takes approximately 1 hour to complete, and the duty officer will attempt to deploy a DAT member for each case.
- During large, multiple-family responses, the lead responder should delegate other responders to interview clients and remain available for interactions with Incident Command, the duty officer, the MOC, and other organizations.

**Provide Information to DAT members**

The duty officer will:

- a. Explain the situation and provide details regarding incident;
- b. Provide the DAT members their direct contact information so that they do not have to go through the dispatch center to reach the duty officer;
- c. Work with the lead responder to identify a pre-determined staging area if responders are to meet at an off-site location prior to proceeding to the incident;
- d. Attempt to ensure trainees are not showing up on site before other DAT members;
  - a. in the even that any responders show up on site before the lead responder, responders will wait for the lead responder before approaching the scene;
- e. Explain the situation regarding other available responders deployed to scene;
- f. Provide the lead responder the on-scene contact’s number;
- g. Instruct the DAT members to contact the duty officer once they arrive on scene;
- h. Provide any other special instruction regarding the response.

**Note:** If it is known that no cell phone service is available, instruct the responders to ask the local Incident Commander to have dispatch call the duty officer once all DAT members are on scene. The DAT members should also complete all possible casework on scene and call the duty officer once back in cell phone range.

**On-Going Communications**

After dispatching the DAT members, the DAT members will contact the duty officer to let them know they have arrived on the scene.

Next, the lead responder should conduct an initial needs assessment and contact the duty officer to discuss the current situation:

- Are additional responders needed?
- Will temporary lodging be needed? Is the client requesting assistance in identifying temporary lodging?
  - If yes:
    - o How many people are in each family and are there any pets?
    - o If there are pets, what kind(s) and how many?
    - o Do they need a room that is ADA accessible?
    - o Do they have a hotel they know of in the area?
- Are there any known needs for health services or mental health services at this time?
• Either this call or an additional follow-up call needs to include a discussion about the needs for health and/or mental health services.

While the DAT member interviewing the client confers with the lead responder prior to committing to direct client assistance, the lead responder will need to ensure that the duty officer is informed of the types of assistance provided so that they can complete the response notification. The DAT members will contact the duty officer when they are ready to leave the scene.

4.5 Safety

Safety is always the first priority.

• All Red Cross responders should dress appropriate for the weather, wear closed toe shoes, and wear a Red Cross vest.
• All Red Cross responders should ensure their family is prepared for disasters. Red Cross responders cannot be focused on helping others if they are unsure of their family’s safety.
• The Red Cross strives to always send a minimum of two responders to a DAT call. If for some reason a responder is asked to respond alone, they must meet the client in a public location such as a restaurant or a motel lobby. No one should ever go to a client’s motel room.
• If there is an accident or injury, it needs to be immediately reported to the lead responder, who will report it to the duty officer.
• If anyone does not feel safe, they should take immediate action to get to a safe area. At that point, they should talk with the lead responder and/or the duty officer about the situation and come up with an alternative plan.
• Life happens - sometimes things change from when DAT members said they would be available until they actually are. If someone gets ill or has taken some medications that are having an adverse effect they should let the duty officer know that they are ill and unable to respond.

4.6 Additional People

Those responding to a disaster cannot bring additional people (spouses, friends, children, etc.) or pets on scene. DAT members need to be focused on the client and not having to worry about untrained people being on the scene.

If a Red Cross responder has a friend or family member that wants to respond with them, they should be directed to the Red Cross website to sign up as a volunteer.
Section 5: On Scene

5.1 Arriving On Scene

- Should any DAT members arrive on scene before the lead responder, they should park and wait outside the scene until the lead responder arrives. Once the on-scene officials realize that a Red Cross representative is present, they are likely to approach and expect that whoever is there can provide assistance.
- The lead responder should be the first and only one to contact the on-scene Incident Command and be the one maintaining contact with the first responders on scene; first responders should not have to deal with multiple Red Cross workers.
- If DAT members are waiting longer than expected for their other team members to arrive, call the lead responder and/or the duty officer to check and see if there is any arrival update.
- Red Cross responders should always park in a location that is safe and out of the way of the first responders. Also, Red Cross responders should not violate parking laws – if someone receives a ticket it is their personal responsibility.
- There are times where DAT members will need to go through the police barricade. DAT responders should show the police their Red Cross identification and let them know that they have been requested. The officer will let them know if they can continue to drive through and roughly where to park.

5.2 On Scene Flow

- The lead responder (typically a DAT Captain or DAT Worker) arrives on scene and makes contact with the on-scene Incident Command.
- The lead responder will assess the situation, consult with the duty officer, and assign tasks to DAT members based on their training and experience.
- DAT members work one on one with clients and will perform an interview, document how the client was affected by the disaster and provide immediate assistance.
- DAT members consult with the lead responder on the direct client assistance before making commitments to the clients.
- DAT members provide direct client assistance and recovery resources to clients.
- DAT members inform the client that a representative from the Red Cross will be contacting them within the next 72 hours to check-in and provide follow up support.

5.3 Identify the Primary Client

When identifying the primary client, caseworkers and Disaster Action Team responders:

1. Introduce themselves, addressing the client as Mr. or Ms.,
2. Learn about the family composition to identify whether one or more primary clients live at the pre-disaster address,
3. Arrange for any immediate health or mental health client needs to be addressed right away,
4. Identify any communication needs (hearing challenges, foreign language) for the primary client and identify an interpreter, when needed.
### Considerations for identifying the Primary Client

<table>
<thead>
<tr>
<th><strong>Primary Client</strong></th>
<th>The primary client is an adult, 18 years old or older, that the family chooses as its contact person during the family’s disaster recovery. An emancipated minor may be a primary client; contact the duty officer for guidance in this situation. Contact the duty officer if an adult lived alone and is not able to act as the primary client. A non-resident primary client, often another family member, may be identified in that situation.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition of family for purpose of Red Cross assistance</strong></td>
<td>A family includes all of the members of a household who plan to live together during their recovery. When you work with a large household, multiple families, or households sharing a pre-disaster housing unit, determine whether the clients should be assisted as one family and one case record or more than one family and multiple case records. Direct client assistance can only be issued to one qualified primary client by client assistance card in each case.</td>
</tr>
<tr>
<td><strong>Housemates</strong></td>
<td>Housemates who plan to live separately after the disaster should be assisted in separate cases with separate assistance and follow-up.</td>
</tr>
<tr>
<td><strong>Visitors</strong></td>
<td>If an individual has been living at the pre-disaster home for a very short period of time, has another primary home or is not participating in the housing costs at the pre-disaster home, and/or has belongings at another home, the Red Cross generally considers that individual to be a visitor to the home. A visitor’s needs for immediate direct client assistance may be assessed using livable, if the visitor is unable to return home in the next day or two.</td>
</tr>
</tbody>
</table>

5.4 **Verifying Primary Client Identity and Address**

In an effort to offer consistent, scalable, and repeatable assistance to clients, responders need to verify the primary client for Red Cross casework and recovery services. Check the client’s eligibility by verifying the client’s identity and address using the Client Verification Chart in Appendix F.

5.5 **Verifying number of families**

Utilize the definition of a family as described above to determine if one or multiple cases should be opened. If DAT responders have any doubt that a family may not live together during their recovery, err on opening a case for each group of people that will recover together as a family.
5.6 **Determine Client Needs and provide assistance**

Utilizing the Immediate Direct Client Assistance Roadmap (see Appendix E), assess and provide all of the direct client assistance according to the client’s qualifications.

<table>
<thead>
<tr>
<th>Steps for assessing direct client assistance qualifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>An answer of yes to the following questions identifies the client(s) as eligible for Red Cross Recovery Service.</td>
</tr>
<tr>
<td>☐ Is the client disaster-affected and does the client request Red Cross recovery services?</td>
</tr>
<tr>
<td>☐ Does the client accept direct client assistance? Some clients have access to other suitable recovery resources, like insurance benefits, and state they do not need or accept direct client assistance from the Red Cross.</td>
</tr>
</tbody>
</table>

Determine livability of the clients residence (generally comes from the Duty Officer)

1. Preferred verification should occur through a fire department of emergency management agency
2. Secondary option can occur through two Red Cross workers verifying livability of the residence.

| ☐ Option A: Immediate direct client assistance: **Home is livable** | **Livable:** A client’s home is **livable** when:
| • The client is able to remain in their home or
| • The client expects to be able to return to and live in the home within 48 hours. Such situations include: unsafe utility outages, breathing difficulties triggered by smoke, or blocked access to the home. |
| ☐ Option B: Immediate direct client assistance: **Home is not livable** | **Not livable:** A client’s home is **not livable** when:
| • The local fire department or emergency management agency (or equivalent) determines the home is not safe for the family members.
| • The client is unable to remain in their home as a result of disaster-caused damage, for at least the next 48 hours. |

Assess need for lodging assistance

☐ Client needs a place to stay for the next night or two: Client states they cannot stay in their home and have no other place to stay:
| • No Red Cross shelter is available or accessible
| • No friend or family to stay with
| • Are not able to access other resources such as insurance benefits or personal resources immediately for lodging needs |

If the client **will not remain in the home** and **has no other place to stay**, provide lodging assistance in addition to Option A: Livable or Option B: Not Livable.

5.7 **Client Interview:**

When meeting with the primary client, responders should set a professional tone for the client interview. Red Cross responders may be the first person that the client will talk to about the disaster. It is crucial to listen, offer hope, and help them begin their recovery process by remember the following:

- utilize active listening: talk to the client, not a keyboard or papers,
- remain neutral while supporting the client’s recovery,
- show caring, empathy and compassion, being mindful of the client’s body language and their own,
- maintain client privacy and confidentiality,
• invite the client to a private or comfortable location, whenever possible,
• respect each client’s circumstances, specific needs and concerns,
• avoid making assumptions,
• avoid interruptions and distractions,
• be patient and allow the client to explain what happened,
• providing comfort kits and stuffed animals,
• refer the client to the on scene responders or calling 911 if the client has a medical emergency,
• refer to Health Services if a client has one or more of the following needs:
  o Loss of medications, prescription eyeglasses, dentures, consumable medical supplies or durable medical equipment
• refer to DMH if the client(s) are in need of disaster mental health support.

5.8 Collect Case Information

DAT members will collect client information and document it on the Client Intake Worksheet or directly into the full version of CAS 2.0. It is critical that DAT responders review the client information they are collecting from the client and verify accuracy. A sample Client Intake Worksheet is available in section 8.

Information to be collected for each case:

Event Information: created by the DAT
• CAS Event Number

Primary Client:
• name
• client identification used to verify the client’s identity and address
• email
• date of birth
• gender
• veterans status
• address, city, and zip code
• phone number
• language spoken
• condition
• race

Family Member(s):
• name
• relationship the primary client
• gender
• veterans status
• date of birth
• condition
• race

Interview Narrative:
• Concise notes that provide details about what happened, how the client was affected, who the client has contacted to assist them with their recovery, and next steps for the clients in their recovery.
• Are the clients in need of temporary lodging assistance?
• What are the items distributed by the DAT during the initial response:
  o moving Forward Booklet
  o comfort Kits
  o blankets
Sample CAS Narrative:

ABC Fire Department stated the house is unsafe and not livable. Landlord is husband’s parents, living 300 miles away. Client has renters insurance. Landlord has no other unit available. Client will need advocacy to reach a Spanish speaking insurance representative. Client was unable to retrieve his wallet and will need information on replacing his ID. For ID: Client used 2 types: Neighbor, Gloria Martinez, 111-222-3333, for his identity; vehicle registration for residence. Client will look for new housing in the same area. Client has no family members or other resources available and needs assistance with temporary lodging.

Client requests help replacing prescription medication. Duty officer notified Disaster Health Services for that Assistance.

Recovery Planning:
- Groups or individuals the clients need to contact for assistance in their recovery
- Items that need to be replaced
- Housing tasks
- Other recovery tasks

How Affected:
- how the livability of the residence was verified
- type of dwelling
- ownership
- status of the utilities
- housing Needs
- planned post-disaster housing
- insurance information

Referrals Provided:
- agency name

If client information is collected using the Client Intake Worksheet; as soon as the information is entered into CAS2.0 and verified as accurate, the Client Intake Worksheet is to be destroyed.

5.9 Client Consent

Once a client has told their story, a DAT member uses the Client consent to Share Information Job Tool (see Appendix I &J) to ensure clients understand and select the information sharing options affecting the Casework and Recovery Planning services that can be offered to a client. The interviewer reads the text aloud to the client in full, documents the client’s choices, and affirms the client’s consent choices on the Client Intake Worksheet and CAS 2.0.

5.10 Service Only Cases

There are times when DAT members are deployed to a scene and through the interview process learn that direct client assistance is not needed. When this occurs, a case should still be generated and entered into CAS. This provides the documentation that Red Cross responded and met with the client. Even if direct client assistance is not needed, clients are still eligible for the following recovery services – comfort kits, blankets, stuffed animals, mental health support, and follow up assistance from a caseworker.
To create a service only case, DAT members need to gather the following details:

- primary client Name
- does the client have a place to stay tonight?
- address, city, state, county, and zip code
- primary client phone number
- client Consent Information
- how livability of the residence was verified
- is the home livable or not livable
- will the client accept Direct Client Assistance?
- client identification information
- number of family members living in the residence
- brief narrative
Section 6: Support Resources

When DAT members need to activate the following support resources, the lead responder contacts the duty officer, who will activate the additional support responders as needed.

6.1 Health Services (DHS)

Reasons for contacting DHS for the purpose of client assistance by phone:
- Client requires emergency medication refill or medical equipment replacement.
- When there is a deceased client DHS completes a mortality report.

Reasons for deploying DHS to scene include:
- clients with health care needs that exceed their family/friends capacity to assist them.
- shelter openings.
- large multi-family response. (i.e., apartment complex, multiple single-family homes).

6.2 Disaster Mental Health (DMH)

Disaster mental health volunteers (also referred to as Emergency Stress Management volunteers) are a resource for both our clients and our staff. DMH volunteers should be contacted anytime the DAT members or duty officer feel they would be beneficial.

Some reasons for potential deployment to scene:
- shelter openings;
- large multi-family response (i.e., apartment complex, multiple single-family homes).

In the event of a fatality incident or deceased pet, DMH must be contacted to initiate contact with the client(s); they may use their judgment in doing this over the phone or on scene with the client(s).

6.3 Public Affairs (PA)

The lead responder should let the duty officer know as soon as they are aware that the media is on scene so that the duty officer may contact the on-call PA person. The lead responder may designate a team member to talk to the media. If the lead responder needs additional support, they may contact the duty officer to request a Public Affairs responder be dispatched to the scene.

If any Red Cross responder is approached by the media it is up to them whether or not they want to talk with the media. If they do talk with the media they should keep in mind:
- Always be courteous and helpful.
- Never discuss client information – this is confidential.
- Talk about their role as a Red Cross Responder and what they do.
- Do not comment on anything you do not know to be true.
- Thank the media for their interest.
- Obtain the name and media outlet of the reporter doing the interview and provide this information to the duty officer.
- Refer the media to the lead responder.
6.4 **Language Line**

The Language Line provides over-the-phone interpretation service for a wide variety of languages. Anyone can call the demonstration line to familiarize themselves with their service; the number for the demonstration line is 1-800-996-8808.

Use of the Language Line is preferred over using members of the general public or utilizing children to translate for clients. A couple of reasons for this is that neither the duty officer nor the DAT members know the translator’s proficiency level, and there are cultures where it is not appropriate to ask children to translate sensitive information for their family (elders). By engaging the Language Line responders are receiving professional translation services which will help the duty officer and DAT members provide the best service possible for the client(s).

If translation services are needed, the lead responder should contact the duty officer who will provide them the instructions for activating the Language Line.
Section 7: **Direct Client Assistance**

7.1 **Determining Direct Client Assistance**

When DAT responders are deployed to a multi-family incident the lead responder must consult with the duty officer before any financial assistance is issued. Based on the livability of the residence and need for lodging assistance DAT responders will issue direct client assistance to the primary client using a client assistance card.

At the conclusion of the client interview, the interviewer and lead responder will excuse themselves away from the client(s) and discuss the interview notes to verify completeness. They will consult with each other about the verified livability of the residence and need for lodging assistance. The point of this conversation is to review and get consensus about the direct client assistance that will be provided. If the interviewer and the lead responder have questions, they should consult with the duty officer. When the amount of financial assistance being discussed is $1,500 or more, the lead responder must consult with the duty officer.

**Livability of Residence:**

<table>
<thead>
<tr>
<th>Determining Financial Assistance</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Home is livable</td>
<td>$50 per person</td>
</tr>
<tr>
<td>☐ Home is NOT livable</td>
<td>$125 per person</td>
</tr>
</tbody>
</table>

**Lodging Assistance**

When the responders have verified that lodging assistance is needed the DAT responders will utilize the Temporary Lodging Assistance Chart in Appendix H for the county in which the client will sleep. The quantity of lodging assistance provided is based on the size of the family, see chart below. **If DAT responders anticipate issuing lodging assistance for 9 or more clients, the DAT must consult with the duty officer.**

<table>
<thead>
<tr>
<th>Family Size</th>
<th>Quantity of Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ 1-4 Clients</td>
<td>Provide lodging assistance with quantity of 1</td>
</tr>
<tr>
<td>☐ 5-8 Clients</td>
<td>Provide lodging assistance with quantity of 2</td>
</tr>
<tr>
<td>☐ 9-12 Clients</td>
<td>Provide lodging assistance with quantity of 3</td>
</tr>
<tr>
<td>☐ Over 12 Clients</td>
<td>Continue in multiples of 4</td>
</tr>
</tbody>
</table>

7.2 **Locating a Hotel**

When providing lodging assistance, Red Cross will offer to assist with locating available lodging for the disaster clients. If the client accepts this assistance, DAT responders with a smart device may search for nearby lodging using their device. If the responders do not have a smart device, notify the duty officer and inform them of the number of people and the number, type, and size of any pets needing temporary lodging. The duty officer will check for available lodging and provide options to the lead responder. When the DAT responder or duty officer is verifying availability, they will collect and share information about the nightly rate, including any additional fees (i.e. pet fees). The duty officer will not make a room reservation for the client as this commonly requires credit card information to hold the room. If a DAT responder
cannot locate a hotel within the Lodging Tier, contact the duty officer. The duty officer will verify that the cost is greater than the lodging tier and may request an exception from the MOC.

7.3 **Client Assistance Cards**

Client assistance cards (CACs) are the primary tool for providing direct client assistance and are issued to DAT workers and captains. If a responder needs to issue $1500 or more to a single family, review the assistance with the duty officer.

- CACs are prepaid credit cards that can be used at establishments that accept Master Cards.
  - The maximum amount of financial assistance that can be issued on a card in a single transaction is $1200. Maximum total amount of assistance that can be issued on a single card is $1500. If financial assistance of $1200 or more is to be provided to family, a second CAC must be issued to the primary client.
  - CACs are cash enabled and clients may withdraw cash using the PIN inside of the sealed CAC envelope.
    - The maximum daily (per day) ATM withdraw amount is $800 per card.
    - The maximum number of ATM withdraws per day is 5.
    - All CACs can be used in any ATM for a fee; all US Bank and MoneyPass ATMs are fee free, locations are available searching online at: http://moneypass.com/atm-locator.aspx or https://www.usbank.com/locations/.

7.4 **Lost/Stolen Client Assistance Cards**

On occasion clients will lose or have their client assistance card stolen. When a client assistance card is lost or stolen, they need to immediately report it to US Bank by calling 866-751-3276. The client may contact the duty officer to request a replacement card be issued for the balance remaining on the card. The duty officer will contact the regional disaster officer/designee to initiate the Regional Disaster Officer Exception Process to have a replacement client assistance card issued. The duty officer will contact a DAT Captain or Worker to meet with the client in person to provide the replacement client assistance card.
Section 8: **Sample Forms**

Included here are examples of common DAT related forms that you can use to help guide you in completing the forms.

DAT Packets should contain:

- Client Intake Worksheet
- Summary of Client Assistance – give to client
- Locally developed resource list – give to client
- Moving Forward After a Disaster – give to client
- Envelope – give to client for to keep their Red Cross documents together

Issued separate from the DAT Packet to DAT workers and DAT captains:

- Client assistance cards
  - Issued in packs of 5 including a Charge Out Record, Client Letters, Client Registers and Card Holder.

DAT members should also bring this manual as it contains process information and the price guide information.

DAT workers and DAT captains can get these forms and resources by contacting their DAT coordinator or disaster program manager. Disaster program managers should request packets (3-6 months’ worth at a time) by placing a request to the Direct Services Support Manager.
8.1 Client Intake Worksheet (top half)
# Client Intake Worksheet (bottom half)

## Insurance

<table>
<thead>
<tr>
<th>Losses</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Disaster Recovery

1. What are the client's recovery plans?
   - Rebuild home
   - Move in temporary housing
   - Rent short term in temporary housing

2. What happened when the disaster struck?
   - Flooded home
   - Storm damage

## Financial Needs

<table>
<thead>
<tr>
<th>Item</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Housing Needs

<table>
<thead>
<tr>
<th>Need</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Client Intake Worksheet (top half)

## Need to Be Met

<table>
<thead>
<tr>
<th>Referral to Agency</th>
<th>Needs</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Recovery Roadblocks

1. Select all that affect the client(s) ability to recover

- Financial hardship
- Health problems
- Insufficient housing
- Lack of transportation

## Recovery Planning

- Insurance claims pending
- Home repair needed
- Temporary housing needed
Summary of Client Assistance - English

Please note the purchase of alcohol, tobacco or weapons is not permitted.

Immediate needs:
Assist with immediate disaster-caused needs such as food, shelter, clothing and other.

Red Cross assistance is made possible by the generosity of our donors and is intended to

To contact the American Red Cross call:

______________________________

______________________________

______________________________

______________________________

Notes:

______________________________

______________________________

______________________________

______________________________

Notes:

______________________________

______________________________

______________________________

______________________________

Address:

______________________________

______________________________

______________________________

______________________________

Contact:

______________________________

______________________________

______________________________

______________________________

For help with:

______________________________

______________________________

______________________________

______________________________

Report to Community Assistance:

Summery of Client Assistance
8.4 Summary of Client Assistance - Spanish

Resumen de Asistencia al Cliente

Nombre del Cliente Principal

Caso #

Fecha

Cómo se proporcione la siguiente fórmula de asistencia recibida con las necesidades:

Resultar del desastre ocurrido en (Dicrocom)

Cómo la producción se aparta de la asistencia recibida con las necesidades

Para ayuda dona

Dirección

Correo

Teléfono

Nombre

Sitio Web:
Section 9: **On-Scene Wrap Up**

9.1 **On Going Communication with Clients**

DAT members will provide each family with the Summary of Client Assistance form. On that document DAT responders will select the assistance provided by the Red Cross, identify the amount of direct client assistance issued on the CAC and will provide clients with 1-888-680-1455 for 24-hour assistance. DAT members should also include any immediate referrals that are appropriate for assisting the family in their recovery. Advise the clients that a Red Cross representative will contact the primary client within 72 hours to check in and provide follow-up recovery planning assistance.

When the duty officer receives a call from a client requesting follow up assistance they will connect the client with a local caseworker to provide follow up assistance.

9.2 **Clear the Scene**

Once the DAT members are ready to clear the scene and return home, it is the responsibility of the lead responder to call the duty officer to advise them that the team is clearing the scene and inform them of any possible follow up issues.
Section 10: Creating a case in CAS 2.0

A case for every response needs to be created in CAS within 12 hours from the time that the DAT meets with the clients for every response. When providing direct client assistance, a case needs to be created as soon as the responder has access to the internet.

10.1 Using the CAS 2.0 Mobile Portal

The following sections are the elements that must be completed when creating a new case in the CAS 2.0 Mobile Portal – For use on a smart phone.

☐ Log into the Mobile Portal: https://cac-pacific.communityos.org/cms/

The mobile version of CAS 2.0 has significantly fewer fields, but does include all of the required fields needed to both activate a CAC, as well as support the required fiscal review. The information is entered using a series of short text boxes and dropdown menus. Note that this is not the full case record, a Client Intake Worksheet should also be used to capture the additional information needed to complete the full case record using the full CAS 2.0 portal.

☐ Use the drop downs to select:
  - Is the client home livable?
  - Does the client have a place to stay tonight?
  - Does client accept DCA?

☐ Enter client information using the dropdown menus and text fields
  - First Name
  - Last Name
  - Address
  - Zip
  - Mobile Phone Number
  - Household Identification – See Appendix F – Client Verification Chart
  - Date of Birth
  - Household Count

☐ Record client consent decision
1. Select from the dropdown how the livability was verified
2. Identify language, if other than English from the drop down
3. If there is need for health or mental health

Create a new Event in CAS 2.0.
- To create a new event, select *Add House Fire*
- To add the case to an existing event (i.e. for a multifamily fire, select the dropdown under the *existing events*). Note: the newest events appear at the bottom of the list.

Using the FastTrack options, add all direct client assistance, by selecting the assistance type, and then the quantity of people that assistance is for.

- Confirm that the assistance types and grand total are correct
- Enter the CAC proxy number
- Enter the name of the responder that performed the interview and affirmed the consent
- Enter the name of the Second Responder (if applicable) that affirmed livability
  - When the livability information is provided by the duty officer, enter the name of the duty officer. If the name is provided directly by a first response agency, type, “N/A - Verification by Fire”
- Click Save
- Confirm case is saved by looking for a confirmation at the top of the screen
### 10.2 Using the CAS 2.0 Full Version

The following sections are the required elements that must be completed when creating a new case in CAS.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Log into CAS 2.0 by going to: <a href="https://cas-pacific.communityos.org">https://cas-pacific.communityos.org</a></td>
</tr>
</tbody>
</table>

**Client Tab**

- Use the drop downs to select:
  - Is the client home livable?
  - Does the client have a place to stay tonight?
  - Does client accept DCA?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>is Client home livable? *  Does client have a place to stay tonight? *  Does client accept DCA? (select)  (select)  (select)</td>
</tr>
</tbody>
</table>

**Client Tab**

- Enter client information using the dropdown menus and text fields
- - primary client name
- - pre-disaster address
- - how client was identified – See Appendix F – Client Verification Chart
- - client mobile phone number
- - email – *optional but highly encouraged*
- - client date of birth

**Client Tab**

- Create a new Event in CAS 2.0.
  - To create a new event select *Add Event*
    - Event Level: 1
    - Status: Open
    - Event Type: Event that most closely matches the event type, most common Fire
    - Select Save
  - To add the case to an existing event (i.e. for a multifamily fire, perform an Event Search for the event created by another responder)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Event Level: * Chapter/Local Event</td>
</tr>
<tr>
<td></td>
<td>DR Level:  (select)</td>
</tr>
<tr>
<td></td>
<td>Event Name:</td>
</tr>
<tr>
<td></td>
<td>Event Number:</td>
</tr>
<tr>
<td></td>
<td>Status: * Open</td>
</tr>
<tr>
<td></td>
<td>Event Type: * (select)</td>
</tr>
</tbody>
</table>

**Note:** The jurisdiction chapter information shown below will be associated to the event once the case has been saved.

**Regional Chapter:** American Red Cross of Northwest Oregon (37104)  **State:** OR
**Servicing Chapter:** American Red Cross of Northwest Oregon (37104)  **County/Parish:** MULTNOMAH
**Local Identifier:**  **Date:** * mm/dd/yyyy |

**Client Tab**

- From the drop down, select the number of individuals in the household/case.
### Client Tab
- Complete the names and demographic information for each individual in the household.
  - First and Last Names
  - Date of Birth
  - Relationship to the Primary client
  - Condition of the individual and need for Health or Mental Health services

### Client Tab
- Record client consent decision

### Client Tab
- Record Interview Details
  - Name of interviewer that affirmed the client consent
  - Name of the Second Responder (if applicable) that affirmed livability (when appropriate)
    - When the livability information is provided by the duty officer, enter the name of the duty officer. If the name is provided directly by a first response agency, type, “N/A- Verification by Fire”

### Client Tab
- Complete the concise Case Narrative

### How Affected Tab
- From the drop down, select how Livability Verification was complete (generally fire department/EMA).

### Direct Client Assistance Tab
- Select the FastTrack for the type of assistance that will be provided the client
  - Immediate Assistance
  - Lodging Assistance
  - Supplemental Assistance
  - Health/Mental Health
  - RDO Exception
  - NOTE: FastTrack lists in yellow are shared with all agencies.
- Select Immediate Assistance and select Livable or Not Livable, as determined.
|   | Update the quantity (Qty) to match the number of people in the residence receiving direct client assistance |
|   | If providing lodging assistance, select the appropriate lodging assistance tier |
Section 11: Special Circumstances

11.1 Disasters involving Tents

Periodically the Red Cross receives calls from people residing in tents that have been destroyed by a disaster (most commonly a fire). Before dispatching DAT members to this type of a disaster, the duty officer will get verification that there was an actual disaster from a local first response agency (most commonly the local fire department) and that this was their primary residence. After verifying that a first response agency responded to the incident, the duty officer will confer with the MOC about the situation before dispatching DAT members.

The duty officer will discuss the uniqueness of the response and provide specific instructions about the individuals that are eligible for assistance. A common challenge to responding to incidents involving tents is gathering and verifying client identification and DAT responders will need to work with the duty officer if common client identification is not available.
Appendix A: Positions Referenced

Here is a list of persons filling positions referenced in this guide:

<table>
<thead>
<tr>
<th>Position</th>
<th>Name/Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disaster Program Manager</td>
<td>varies by area; see Appendix B</td>
</tr>
<tr>
<td>Direct Services Support Manager</td>
<td>Curtis Peetz</td>
</tr>
<tr>
<td>Manager On Call</td>
<td>rotates weekly</td>
</tr>
<tr>
<td>Regional Disaster Program Officer</td>
<td>Cara Sloman</td>
</tr>
<tr>
<td>Duty Officer</td>
<td>rotates</td>
</tr>
</tbody>
</table>
Appendix B: Oregon / Washington County Maps
Appendix C: Disaster Program Manager Map
### Appendix D: Program Managers by County

<table>
<thead>
<tr>
<th>County</th>
<th>DPM Primary Work Location</th>
<th>DPM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baker</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Benton</td>
<td>Salem, OR</td>
<td>Frank Spangler</td>
</tr>
<tr>
<td>Clackamas</td>
<td>Portland, OR</td>
<td>Michelle Taylor</td>
</tr>
<tr>
<td>Clark</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Clatsop</td>
<td>Portland, OR</td>
<td>Cara Sloman</td>
</tr>
<tr>
<td>Columbia</td>
<td>Portland, OR</td>
<td>Cara Sloman</td>
</tr>
<tr>
<td>Coos</td>
<td>Medford, OR</td>
<td>Jenny Carver</td>
</tr>
<tr>
<td>Cowltiz</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Crook</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Curry</td>
<td>Medford, OR</td>
<td>Jenny Carver</td>
</tr>
<tr>
<td>Deschutes</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Douglas</td>
<td>Medford, OR</td>
<td>Jenny Carver</td>
</tr>
<tr>
<td>Gilliam</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Grant</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Harney</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Hood River</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Jackson</td>
<td>Medford, OR</td>
<td>Jenny Carver</td>
</tr>
<tr>
<td>Jefferson</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Josephine</td>
<td>Medford, OR</td>
<td>Jenny Carver</td>
</tr>
<tr>
<td>Klamath</td>
<td>Medford, OR</td>
<td>Jenny Carver</td>
</tr>
<tr>
<td>Klickitat</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Lake</td>
<td>Medford, OR</td>
<td>Jenny Carver</td>
</tr>
<tr>
<td>Lane</td>
<td>Salem, OR</td>
<td>Frank Spangler</td>
</tr>
<tr>
<td>Lincoln</td>
<td>Salem, OR</td>
<td>Frank Spangler</td>
</tr>
<tr>
<td>Linn</td>
<td>Salem, OR</td>
<td>Frank Spangler</td>
</tr>
<tr>
<td>Marion</td>
<td>Salem, OR</td>
<td>Frank Spangler</td>
</tr>
<tr>
<td>Morrow</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Multnomah</td>
<td>Portland, OR</td>
<td>Michelle Taylor</td>
</tr>
<tr>
<td>Pacific</td>
<td>Portland, OR</td>
<td>Cara Sloman</td>
</tr>
<tr>
<td>Polk</td>
<td>Salem, OR</td>
<td>Frank Spangler</td>
</tr>
<tr>
<td>Sherman</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Skamania</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Tillamook</td>
<td>Portland, OR</td>
<td>Cara Sloman</td>
</tr>
<tr>
<td>Umatilla</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Union</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Wahkiakum</td>
<td>Portland, OR</td>
<td>Cara Sloman</td>
</tr>
<tr>
<td>Wallowa</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Wasco</td>
<td>Vancouver, WA</td>
<td>Kyle Henning</td>
</tr>
<tr>
<td>Washington</td>
<td>Portland, OR</td>
<td>Michelle Taylor</td>
</tr>
<tr>
<td>Wheeler</td>
<td>Bend, OR</td>
<td>Carrie Sammons</td>
</tr>
<tr>
<td>Yamhill</td>
<td>Portland, OR</td>
<td>Cara Sloman</td>
</tr>
</tbody>
</table>
## Appendix F: Client Verification Chart

<table>
<thead>
<tr>
<th>Type of documentation</th>
<th>Verification considerations for responders</th>
<th>How to document in CAS 2.0</th>
</tr>
</thead>
</table>
| **Driver’s License**  | • Does the address on the ID match the address of the disaster  
• Picture on the ID match the client  
• Does the name on the ID match the name provided by the client?  
• Date of birth (to document date of birth in the client intake worksheet)  | Two-letter state abbreviation, followed by “DL”, the last four digits of the license number, and the month and year when the license expires.  
**OR DL 5643 Exp 6/20**  
**WA DL 9823 Exp 5/16**  |
| **Government Document** | • Does the address on the ID match the address of the disaster (or address provided by the client)?  
• Picture on the ID match the client  
• Does the name on the ID match the name provided by the client?  
• Date of birth (to document date of birth in the client intake worksheet)  | Military ID: “DoD” followed by the last four digits of the identification number and the month and year when the ID expires:  
**DoD 1234 Exp 6/18**  
For a state ID, two-letter state identifier followed by “ID,” the last four digits of the identification number, and then the month and year when the ID expires:  
**WA ID 1234 Exp 6/18**  |
| **Fire or Police** | • How did the police or fire official verify the client as a resident?  | The officer’s name and badge number  |
| **Neighbor** | **Neighbor**  
• Preferably a neighbor that was not also impacted by the disaster and a client.  
**Landlord**  
• If a multi-family incident, inquire if a tenant roster is available by address.  
• Inquire if the landlord may have any available units that the clients may be able to move into.  | Name and phone number of the neighbor  |
| **Utility Bill** | • Does the address on the bill match the address of the disaster (or address provided by the client)?  
• Does the name on the bill match the name provided by the client?  | The month and year of the bill’s date and an indicator of the type of utility: **12/14 Power Bill**  |
| **Other** | **Passport or foreign ID**  
• NOTE: **Cannot be used to verify client as a resident of a disaster.**  
• Picture on the ID match the client  
• Does the name on the ID match the name provided by the client?  | Passport or foreign ID:  
Type of ID followed by two-letter country identifier, the last four digits of the identification number, and then the month and year when the ID expires:  
**Passport MX 1234 Exp 6/18**  |

In the event that the DAT responders cannot verify client identity or address using the items identified above contact the duty officer for direction. It is preferred not to have clients identified by other individuals that are also being provided with financial assistance.
## Appendix G: DCA Price List

### Lodging Assistance
- **Option A**: For clients who do not have a place to stay tonight and are unable to remain in the home as a result of disaster caused damage, for at least the next 48 hours. Client is able to return and live in the home within 48 hours. $125 per person.
- **Option B**: For clients whose home is not livable and all personal property is destroyed. $50 per person.
- **Option C**: For clients whose home is not livable and all personal property is destroyed. $125 per person.

### Immediate Direct Client Assistance
- **Option A**: For clients whose homes are not livable. Client is able to return and live in the home within 48 hours. $125 per person.
- **Option B**: For clients whose homes are not livable but all personal property is destroyed. $50 per person.
- **Option C**: For clients whose homes are not livable but all personal property is destroyed. $125 per person.

### DCA Price List

<table>
<thead>
<tr>
<th>Issue on Friday:</th>
<th>Tier 1</th>
<th>Tier 2</th>
<th>Tier 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>$250 per case</td>
<td>$350 per case</td>
<td>$450 per case</td>
<td>$550 per case</td>
</tr>
</tbody>
</table>

### Qualification Requirements
- The Regional Disaster Officer must follow the RDO Exception Job Tool and document exception in CAS: 2.0.
- If qualified for immediate assistance, the CAC requests assistance on the same CAC as was used for immediate assistance. Individual assistance must be made within 30 days of the first interview.
- Only for those Not Livable cases meeting ALL qualification criteria.

### Medical Health Services
- For clients needing essential medications, functional needs equipment and/or disaster-related health services, including nursing assistance, in-home/DMH approval.

### Health and Mental Health Services
- For cases with an identified need for mental health services, including nursing assistance and care in the home (DMH approval), the Regional Disaster Officer must provide assistance.

### Other Services
- Following supervisor approval, issue Option A, B or C only once.

### Note
- All prices are subject to change without notice.
Immediate direct client assistance reference information

<table>
<thead>
<tr>
<th>Livability of home (/# of residents)</th>
<th>Livable</th>
<th>Not Livable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$50</td>
<td>$125</td>
</tr>
<tr>
<td>2</td>
<td>$100</td>
<td>$250</td>
</tr>
<tr>
<td>3</td>
<td>$150</td>
<td>$375</td>
</tr>
<tr>
<td>4</td>
<td>$200</td>
<td>$500</td>
</tr>
<tr>
<td>5</td>
<td>$250</td>
<td>$625</td>
</tr>
<tr>
<td>6</td>
<td>$300</td>
<td>$750</td>
</tr>
<tr>
<td>7</td>
<td>$350</td>
<td>$875</td>
</tr>
<tr>
<td>8</td>
<td>$400</td>
<td>$1000</td>
</tr>
<tr>
<td>9</td>
<td>$450</td>
<td>$1125</td>
</tr>
<tr>
<td>10</td>
<td>$500</td>
<td>$1250</td>
</tr>
</tbody>
</table>

Lodging Assistance (# of residents)

<table>
<thead>
<tr>
<th>Lodging Assistance (# of residents)</th>
<th>Tier 1 – Check-in, Saturday through Thursday</th>
<th>Tier 2 – Check-in, Saturday through Thursday</th>
<th>Tier 3 – Check-in, Saturday through Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-4</td>
<td>$170</td>
<td>$230</td>
<td>$280</td>
</tr>
<tr>
<td>5-8</td>
<td>$340</td>
<td>$460</td>
<td>$560</td>
</tr>
<tr>
<td>9-12*</td>
<td>$510</td>
<td>$690</td>
<td>$840</td>
</tr>
</tbody>
</table>

*If providing lodging for 9 or more people, contact the duty officer for consultation.

REMINDER:
- if CAC total is greater than $1,200, a second CAC must be issued;
- if the total direct client assistance is greater than $1,500, consult with the duty officer prior to informing the client.
### Appendix H: Temporary Lodging Chart

<table>
<thead>
<tr>
<th>County</th>
<th>Temporary Lodging Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baker</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Benton</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Clackamas</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Clark</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Clatsop</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Columbia</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Coos</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Cowlitz</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Crook</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Curry</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Deschutes</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Douglas</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Gilliam</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Grant</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Harney</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Hood River</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Jackson</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Jefferson</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Josephine</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Klamath</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Klickitat</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Lake</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Lane</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Lincoln</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Linn</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Marion</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Morrow</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Multnomah</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Pacific</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Polk</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Sherman</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Skamania</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Tillamook</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Umatilla</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Union</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Wahkiakum</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Wallowa</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Wasco</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Washington</td>
<td>Tier 2</td>
</tr>
<tr>
<td>Wheeler</td>
<td>Tier 1</td>
</tr>
<tr>
<td>Yamhill</td>
<td>Tier 1</td>
</tr>
</tbody>
</table>

**Note:** Select the lodging assistance tier for the county in which the client will sleep.
Appendix I: Client Consent - English

Read the following text to the primary client in full:

“The American Red Cross respects your privacy and wants to honor your preferences about how your information is used. The Red Cross can better serve you if we may share your information with other organizations that may be able to provide services to support your recovery.

There are three information-sharing options. I will explain each one and then ask whether you wish to choose that option. You may choose one, two, or all three, or you may choose to decline any sharing of your information. I will document your choices, and the Red Cross will follow your instructions unless there are special circumstances where we need to use your information to address legal or safety requirements.”

Read the following options to the primary client in full:

<table>
<thead>
<tr>
<th>Option 1: Yes or No</th>
<th>General: If you choose this option, we may share your information with any person or organization that may be able to support your recovery. This includes community agencies, your landlord, your insurance company, but it does not include government.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option 2: Yes or No</td>
<td>Medical: If you choose this option, we may share your information with medical providers and/or pharmacies.</td>
</tr>
<tr>
<td>Option 3: Yes or No</td>
<td>Government: If you choose this option, we may share your information with local, state and/or federal agencies and the programs they administer, in order to support your recovery.</td>
</tr>
<tr>
<td>OR</td>
<td>Sharing Declined: If you choose this option, you have declined any sharing of your information.</td>
</tr>
</tbody>
</table>
Appendix J: Client Consent - Spanish

Lea en su totalidad el siguiente texto al cliente principal:

“La Cruz Roja Americana respetará su privacidad y quiere honrar sus preferencias en cuanto al uso de su información. La Cruz Roja puede servirle mejor si se le permite compartir su información con otras organizaciones que podrían proporcionar servicios para respaldar su recuperación.

Hay tres opciones para compartir información. Le explicaré cada una y posteriormente le preguntaré si desea elegir esa opción. Puede elegir una, dos o las tres, o puede rechazar la elección de compartir su información. Documentaré su elección y la Cruz Roja seguirá sus instrucciones a menos que haya circunstancias especiales en donde necesitemos usar su información para atender requisitos legales o de seguridad”.

Lea en su totalidad el siguiente texto al cliente principal:

| Opción 1: | General: Si elige esta opción, podemos compartir su información con cualquier persona u organización que pueda respaldar su recuperación. Esto incluye agencias comunitarias, su arrendador, su compañía de seguros, pero no incluye al gobierno. |
| Opción 2: | Médica: Si elige esta opción, podemos compartir su información con proveedores médicos y/o farmacias. |
| Opción 3: | Gobiero: Si elige esta opción, podemos compartir su información con agencias locales, estatales o federales y con los programas que estas administran, para poder respaldar su recuperación. |
| O | | |
| Si o No | Rechazo para Compartir Información: Si usted elige esta opción, es porque rechaza que su información se comparta. |