

The Listos California Data Tracking Tool

*A Printable Guide for
Administrators*

Updated Sept 28, 2020

**Expanded to include COVID-19 Communication Activity Survey,
Dashboard, and Reporting**



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Getting Started with the Listos California Data Tracking Tool

Overview

Step 1:

- A. **Register your organization** with Merit at merits.com. If you've worked with Merit before, you may have already done this!
- B. **Log into the Listos California Data Tracking Tool** by visiting listosca.merits.com.
 - a. **Link your organization** account in Merit with the Listos California Data Tracking Tool.
- C. **Manage** sub-grantees and add Administrators and Engagement Leaders.
 - i. Add your sub-grantee organization(s) to your dashboard.
 - ii. Add Engagement Leaders to your dashboard.

Step 2:

- A. **Record Engagements** by entering information into surveys about the venues, training types, demographics, and engagements.
- B. **Send merits (optional)**. Individuals that would like to receive a merit may do so by providing their full name and email address. Merits can be sent one at a time at the end of each survey, or in bulk via spreadsheet upload.
- C. **Monitor and export reports**. Note that because of the organization hierarchy established by Listos California and Valley Vision, you will only be able to see information from your organization and any sub-grantees. Valley Vision (and those they grant access to) will be able to see the data across all participating organizations.

For questions regarding your role with the Listos California Campaign please contact Grace Kaufman at grace.kaufman@valleyvision.org

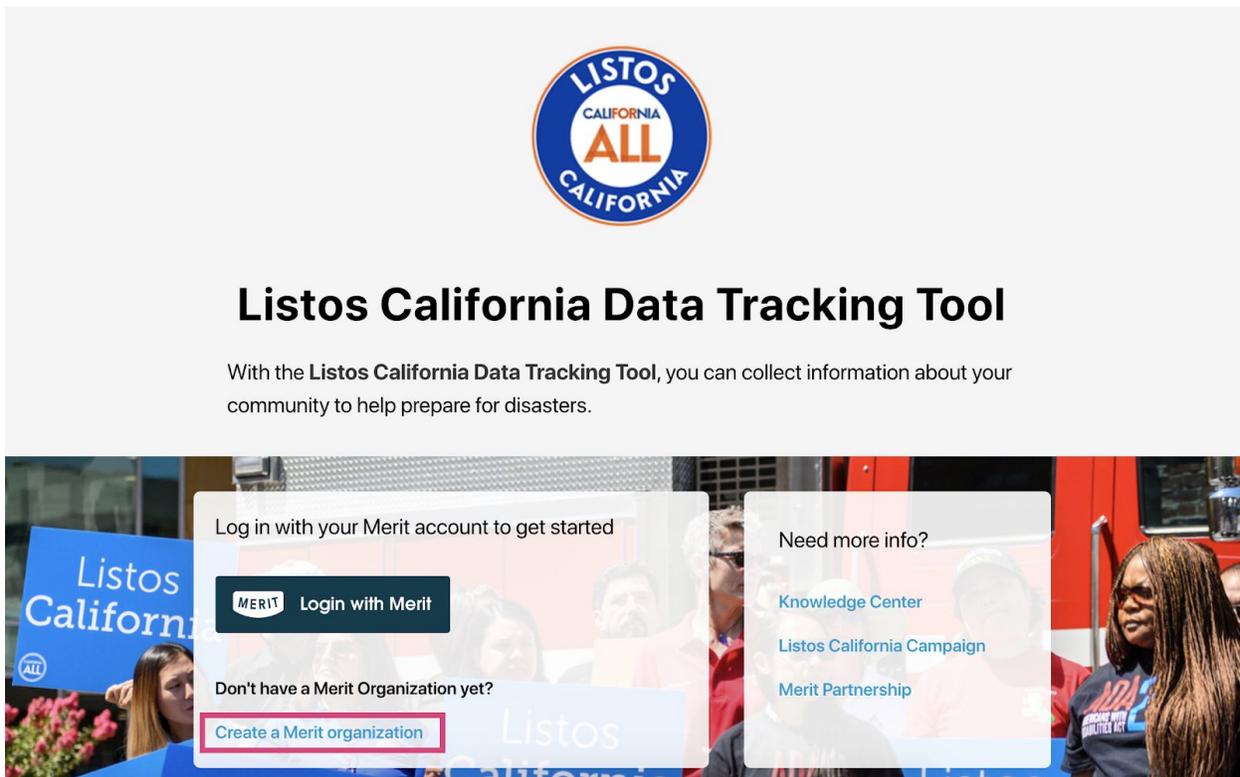
For technical questions about how to use the tool, please contact Merit Customer Support Team at help@merits.com



Step 1: Register, Log in, and Manage Sub-grantees, Administrators, and Engagement Leaders

A. Register Your Organization with Merit

From the Listos California Data Tracking Tool at ListosCA.merits.com, select **Create a Merit Organization**. *You may have already done this!*



A new browser tab will open and direct you to the registration form at merits.com.

Enter your name and organization information as prompted

1. **First & Last Name:** Please provide your full name for verification.
2. **Your Email:** This must be a valid email address.
3. **Org Name:** Every organization must have a name and each organization that you create must have a unique name.

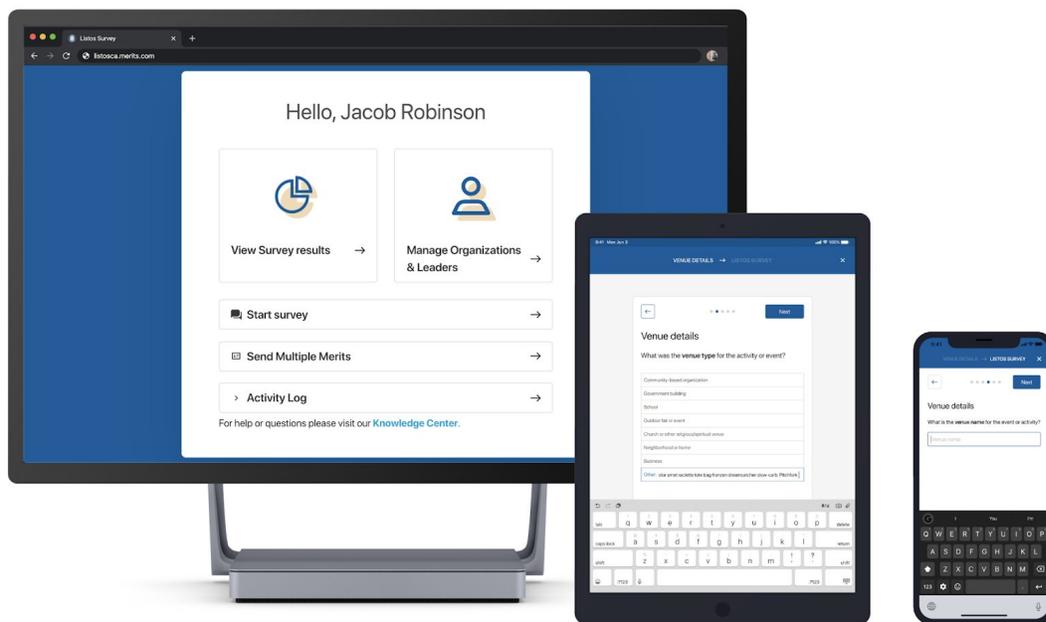
After submitting the new organization request form, you'll receive an email with a link giving you immediate access to your organization's Merit account. A Merit representative will reach out shortly to validate your organization.

B. Log into the Listos California Data Tracking Tool

Access the Listos California Data Tracking Tool by visiting listosca.merits.com.

Before you login, you will need to be either an administrator of a validated organization on Merit **and** have accepted your Engagement Administrator merit, **or** have been added as an Engagement Leader by another organization using the data tracking tool, **and** have accepted your Engagement Leader merit.

Accessible on any device!



Using your Merit login credentials, login to the data tracking tool.

LISTOS CALIFORNIA ALL CALIFORNIA

Listos California Data Tracking Tool

With the Listos California Data Tracking Tool, you can collect information about your community to help prepare for disasters.

Log in with your Merit account to get started

Need more info?

Don't have an organization account? Create a Merit organization

Log in with Merit

Knowledge Center

Listos California Initiative

Merit Partnership

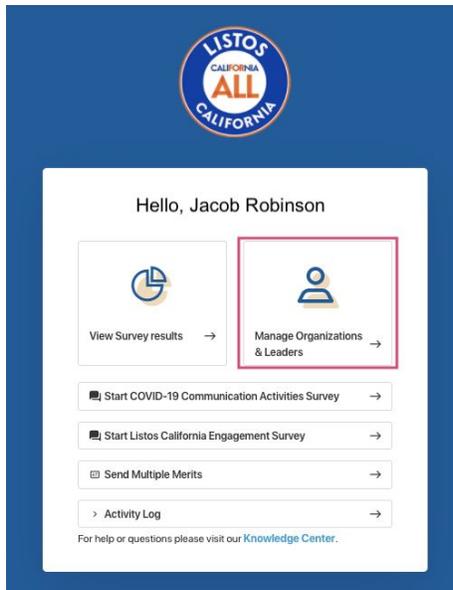
The first time your organization account with Merit is linked to the data tracking tool, you'll be asked for confirmation to link the two systems. If you are an administrator for more than one organization registered on Merit, you will be asked to confirm which organization you would like to link with at that time.

C. Manage Sub-grantees and add Administrators and Engagement Leaders.

Add Sub-grantee Organizations to Your Dashboard

**Note: All organizations need to register with Merit before they are added to the data tool.*

Navigate and log-in to the Listos California Data Tracking Tool ListosCA.merits.com

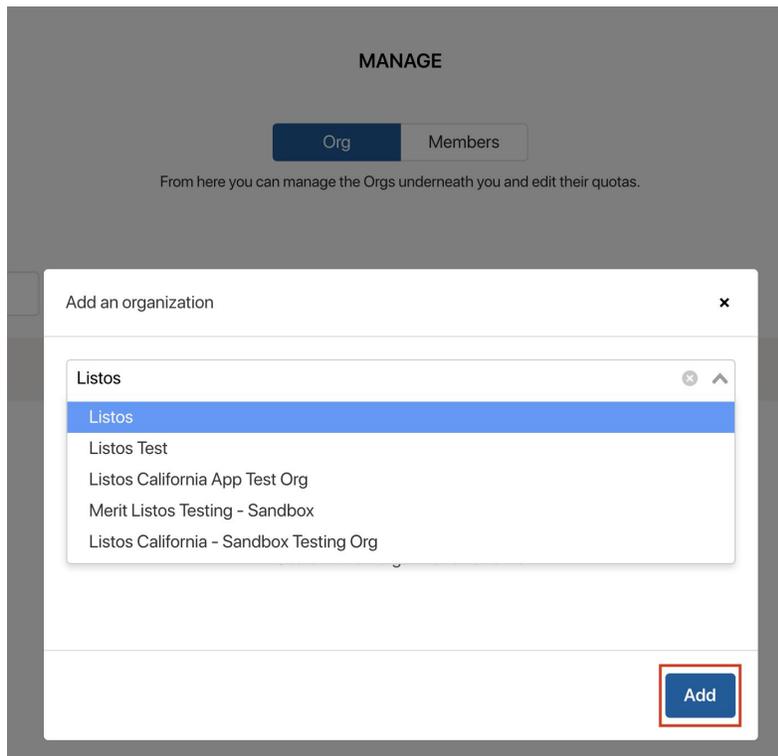


Choose the **Manage Organizations & Leaders** box on the right

Choose to Manage **Organizations** at the top of the screen, and then select the **+ Add Organization** button on the right



In the pop-up window, type in the name of the sub-grantee organization, select the appropriate organization, and click **Add**.



Add Additional Administrators and Engagement Leaders to your Dashboard

Navigate to the **Leaders** dashboard and choose **+ Add Leader** on the right side of the screen.



Add a New Leader ✕

First name Last name

Email address

ACCESS LEVEL

Engagement Leader: Access is limited to conducting surveys.

Engagement Administrator: Full access to all features.

STATUS

Active

Add

Enter:

- First Name
- Last Name
- Email Address

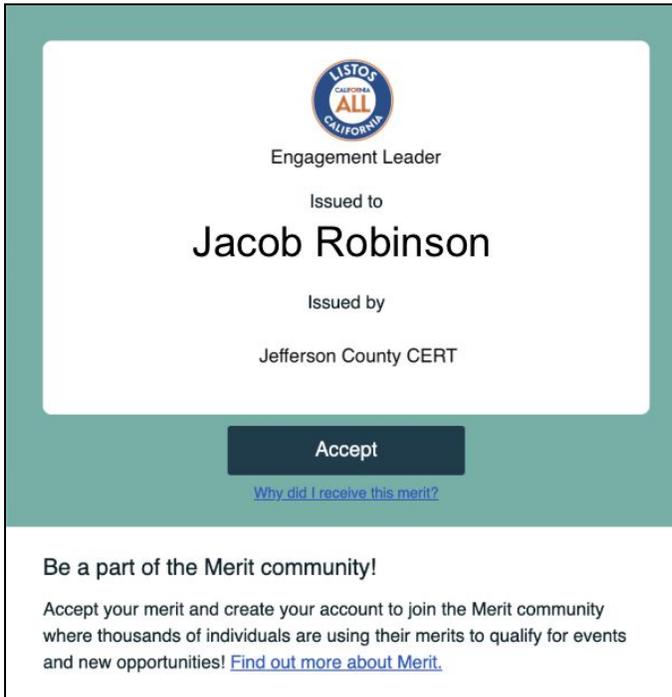
Assign the permission level:
*Administrator or
Engagement Leader*

Select Status

Click **Add**

You've added an Engagement Leader to your dashboard!

Your Engagement Leader will immediately receive an email notifying them that they have received an “Engagement Leader” merit from you.



The screenshot shows an email notification with a teal header and footer. At the top center is the LISTOS CALIFORNIA ALL CALIFORNIA logo. Below it, the text reads: "Engagement Leader", "Issued to", "Jacob Robinson", "Issued by", and "Jefferson County CERT". A dark blue button with the word "Accept" is centered below the text. Underneath the button is a blue link: "Why did I receive this merit?". At the bottom of the email, there is a section titled "Be a part of the Merit community!" followed by a paragraph: "Accept your merit and create your account to join the Merit community where thousands of individuals are using their merits to qualify for events and new opportunities! [Find out more about Merit.](#)"

This email contains a link for them to accept this merit and set up their Merit profile.

**You went through this process when you received your Administrator merit.*

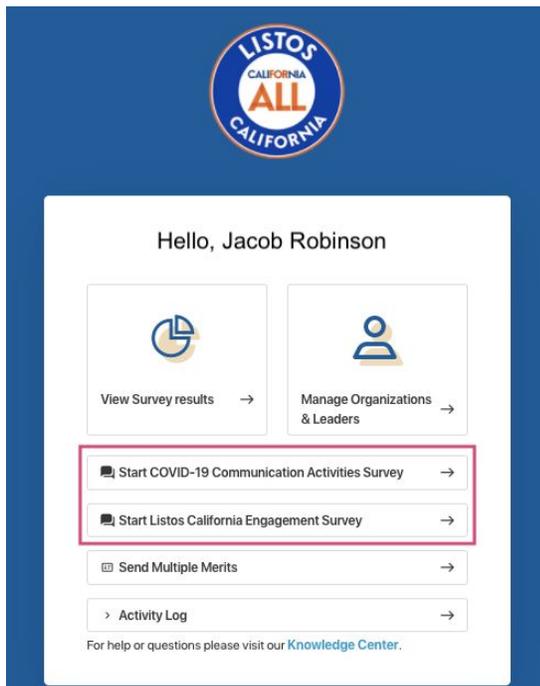
Step 2: Record, Manage and Monitor your Engagements

A. Record Engagements

Record information about your engagements by submitting a survey within the Listos California Data Tracking Tool.

If content included:	Report it as	
	Emergency Preparedness Engagement	COVID-19 Communications Activity
Only information on the key steps of emergency preparedness and I was able to verify that someone actively processed the information	✓	
Information on the key steps of emergency preparedness <u>and</u> COVID-19 , and I was able to verify that someone actively processed the information	✓	
Information on the key steps of emergency preparedness <u>and</u> COVID-19 , but I <u>was not able to</u> verify how many people actively processed the information		✓
Only COVID-19 information and no information on the key steps of emergency preparedness		✓

*Please refer to the [New or Expanded Guidance for Engagement Tracking and COVID-19 Communications Activities During Social Distancing](#) document for further guidance, or reach out to Evan Schmidt at evan.schmidt@valleyvision.org.



Log-in to the data tool, then, from the welcome screen, select the type of engagement or activity you're going to record.

A:1 COVID-19 Communication Activity Survey Questions

About the Activity:

Enter information about your **planned** communication efforts.

- Date of the communication activity
- The type of COVID-19 communication activity
- Type of measurement used to find how many persons were reached
- Number of persons reached
- County or counties the activity was conducted
- The language the activity was presented
- The ethnic populations that you were **aiming** to engage for this activity
- The primary socially vulnerable populations that you were **aiming** to engage for this activity

A:2 Listos California Engagement Survey Questions

About the Venue:

Enter information about your **planned** efforts.

- Name of the activity
- Date of the activity
- Location of the activity
- Number of persons engaged
- ZIP Code of location of activity

VENUE DETAILS

Event Name
Food Drive

Event Date
Friday, February 21st 2020

Location Name
Shopping Mall Parking Lot

Zip Code
96001

People Surveyed
54 People

Start Date
21 Feb 2020

The event is held for multiple days

Change venue Use this venue

**Note: After entering in the venue information, click “Use this venue” to proceed to the engagement questions. For those that have already submitted information, the venue information from the previous entry will appear. Simply edit the date of the event if the venue is the same and continue with the survey, or select “Change venue” to change the venue before continuing with the survey.*

About the Activity:

Enter information about your **planned** efforts.

- What language(s) was the engagement or event presented?
- What language(s) were the materials presented?
- What was the primary ethnic population that you were **aiming** to engage for this event or activity?
- What, if any, were the secondary ethnic populations that you were **aiming** to engage for this event or activity?
- What was the primary socially vulnerable population that you were **aiming** to engage for this event or activity?
- What, if any, were the secondary socially vulnerable populations that you were **aiming** to engage for this event or activity?

At the end of the survey you'll have the option to send a digital badge (merit) to the Californians you engaged. (Step by step instructions in Section B below.)

Finally, you'll be given the opportunity to provide any additional information that you would like to share about the event. This is optional. When you're finished, click [Submit].

B. Send Merits (Optional)

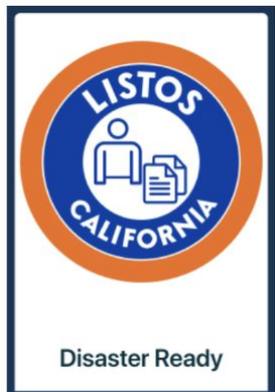
At the end of each survey submission, Engagement Leaders will have the option to send participants merits that represent their emergency preparedness journey. There are three different merits to choose from based on the type of activity.

Determine which merit best describes the activity:



Disaster Aware

Send this merit to those where basic information was shared verbally in less than 15 minutes (such as tabling or other brief engagements).



Disaster Ready

Send this merit to those participants that attended training lasting more than 15 minutes but less than two hours (such as the 1-hour training developed by the Listos California Campaign, or others).



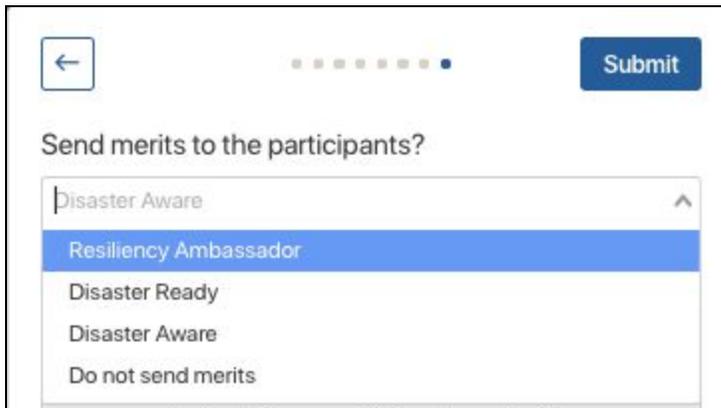
Resiliency Ambassador

Send this merit to those participants that attended training lasting more than two hours (such as CERT 20-hour curriculum or the Listos Program 8-hour curriculum, or others).

Send Merits One-by-one

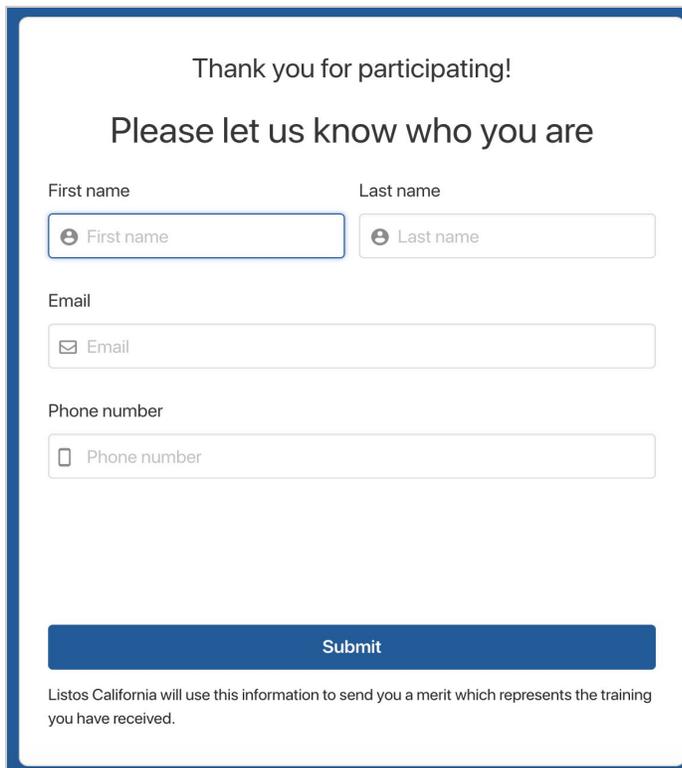
The last question in the survey asks if you'd like to send merits (digital badges). Use the arrow to access, and select either the type of merit to send or opt to not send merits. Finally submit the survey by clicking the blue Submit button at the top.

****Note: this option is to send merits one-by-one, we'll cover how to send multiple using a spreadsheet on the next page.****



The screenshot shows a survey interface. At the top left is a back arrow, and at the top right is a blue 'Submit' button. Below the navigation is a progress indicator with five dots, the second of which is filled. The main question is 'Send merits to the participants?'. Below this is a dropdown menu with the following options: 'Disaster Aware', 'Resiliency Ambassador' (highlighted in blue), 'Disaster Ready', 'Disaster Aware', and 'Do not send merits'.

If you opted to send merits a pop-up form will appear allowing you to enter each recipient's information.



The pop-up form has a white background with a blue border. At the top, it says 'Thank you for participating!' followed by 'Please let us know who you are'. There are four input fields: 'First name' and 'Last name' (each with a person icon), 'Email' (with an envelope icon), and 'Phone number' (with a phone icon). A blue 'Submit' button is at the bottom. Below the button, it says 'Listos California will use this information to send you a merit which represents the training you have received.'

Required information to send a merit:

- First name
- Last name
- Email address

Optional information:

- Phone number

Send Multiple merits using a spreadsheet (CSV file).

Send multiple merits to multiple persons using a spreadsheet by selecting the **Send Multiple Merits** option from the Listos California Data Tracking Tool welcome screen.

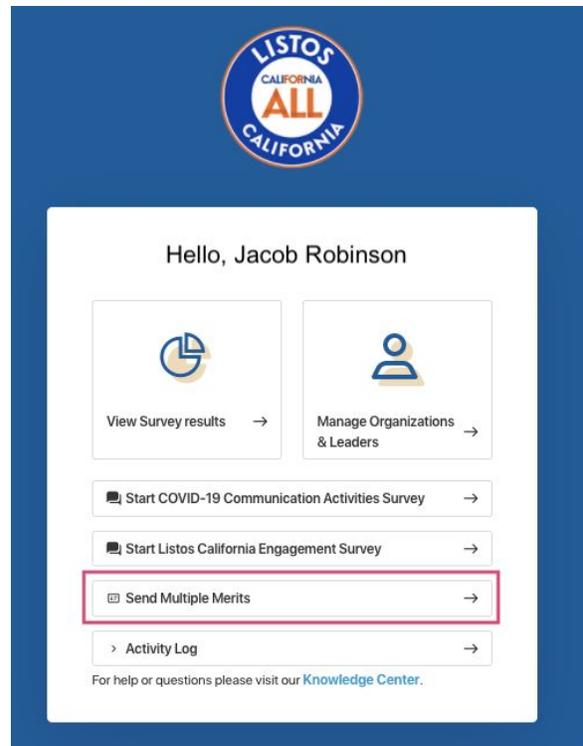
Before you start

- Ensure that you are an Administrator of your organization on both the Listos California Data Tracking Tool **and** the registered organization on Merit.
 - If you do not have administrator permissions you will receive an error code. Ask your organization point of contact for administrative permissions.
- Format your CSV file to include
 - A column each for First Name, Last Name, and Email Address
 - Column headers in the first row
 - Have a first name, last name and email address for each merit recipient
 - Delete any empty rows or columns
 - Save your file as a .CSV

Getting Started

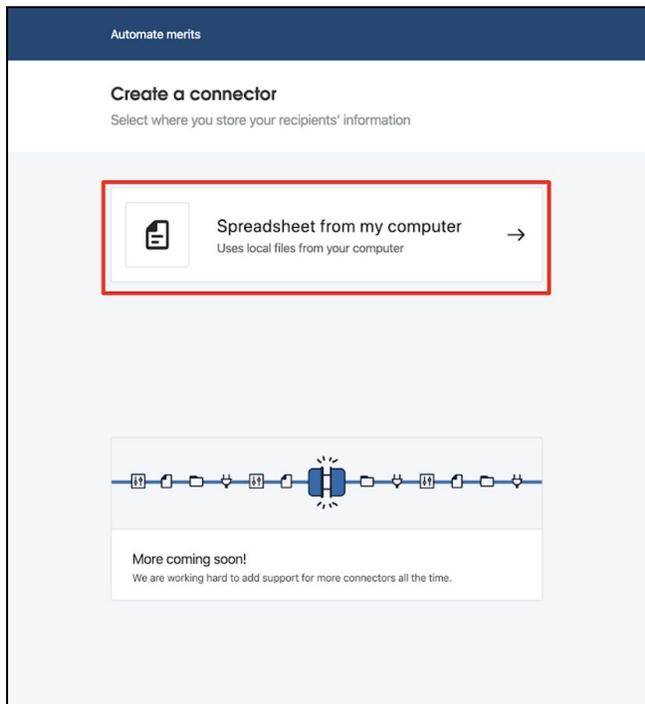
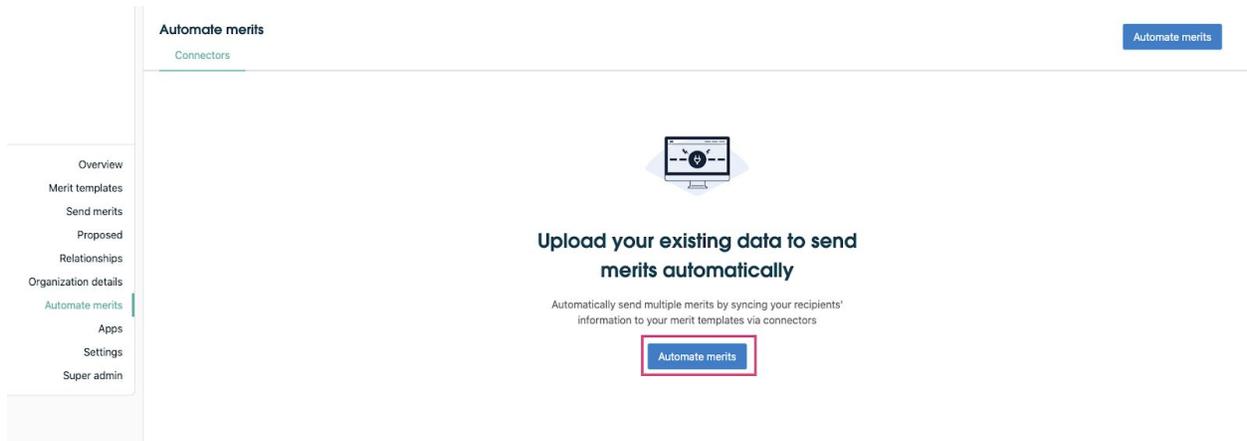
From the Listos Data Tracking Tool welcome screen, select Send Multiple Merits.

Your browser will redirect you to the **organization portal** in Merit.



Step 1: Click the Automate merits button on the center of the screen.

Merit Organization Portal view:



Step 2: Create a connector by selecting where you store your recipients' information.

Click on **Spreadsheet from my computer**.

Step 3: Name your connector to represent the merits that will be sent from this connector.

- Type the name in the **Connector name** box.
- Click **Next, upload a file**.

Automate merits ×

Configure your spreadsheet connector

Set a name and description that makes it easy to differentiate the connector from others

Connector name

Disaster Aware ✓

Name your connector to represent the merits that will be sent from this connector

Description (optional)

This CSV and connector is for all of the Californians that earned a digital badge, or merit for becoming more prepared for emergencies.

Back Next, upload a file

Step 4: Drag or click to upload your spreadsheet.

Automate merits ×

Upload the files you want to automate merits

Import data columns from your spreadsheet file

Disaster Aware



Drag or click to upload your spreadsheet

.csv accepted | 250MB limit per file
Have a different file type? [Learn how to convert it](#)

Back Finish creating connector

Step 5: Click **Finish creating connector**.

The screenshot shows a window titled "Automate merits" with a close button (X) in the top right corner. Below the title bar, the heading "Upload the files you want to automate merits" is followed by the instruction "Import data columns from your spreadsheet file". The main content area is titled "Disaster Aware" and contains a single file entry: "Disaster Aware Listos CA .csv" with a checkmark and the text "0 column headers to map". At the bottom right of the window, there are two buttons: "Back" and "Finish creating connector", with the latter highlighted by a red rectangular box.

Step 6: Select the **Map a template** in the connector you just created.

The screenshot shows the "Automate merits" interface with a "Connectors" tab selected. A blue "Automate merits" button is in the top right. Below the tab, the heading "Needs your attention" is followed by a "Refresh List" link. A connector card for "Disaster Aware" is shown with a refresh icon and the text "No template mapped". To the right of the card are "Sync" and "Map a template" buttons, with the latter highlighted by a red rectangular box and a right-pointing arrow.

Step 7: Select a merit template from the dropdown menu, **Map column** headers to the merit template, then click **Create mapping** at the bottom corner.

Map data columns to your template

To automate merits, you need to map imported columns to a matching field on the template

Disaster Aware

Select a file
Disaster Aware Food Drive.csv

Select a template
Disaster Aware

ⓘ Merit templates with required media attachment fields do not appear in this list

Fields found on this template

Recipient Name (First name) * → Map a column

Recipient Name (Last name) * → Map a column

Revoke handling (optional)

Should revoke → Map a column (optional)

Merit automation can help you revoke merits. Select the column that indicates which merits will be revoked.

The recommended values for revoking a merit are **yes, y, 1, or true**.
Merits remain unchanged if the value is **left empty, no, n, 0, or false**.

Create mapping

Step 8: When you're ready to send merits, click **Sync to complete the process.**

Automate merits

Connectors

Automate merits

Needs your attention Refresh List

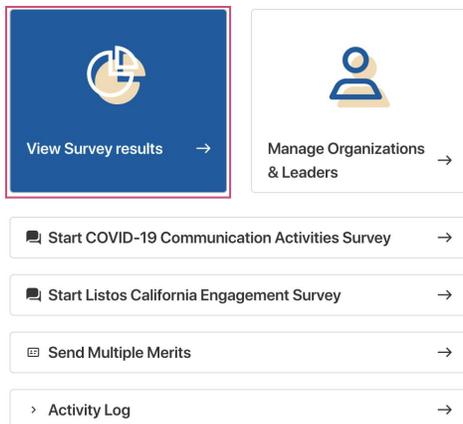
Disaster Aware Disaster Aware Sync Map a template →

Note: The connector will now show the status. Syncing times will vary depending on the size of the CSV uploaded. There's no need to stay on this page and wait, Merit will send you an email when everything is completed.

C. Monitor Results and View Reports

Note that because of the organization hierarchy established by Listos California and Valley Vision, you will only be able to see information from your organization and any sub-grantees. Valley Vision (and those they grant access to) will be able to see the data across all participating organizations.

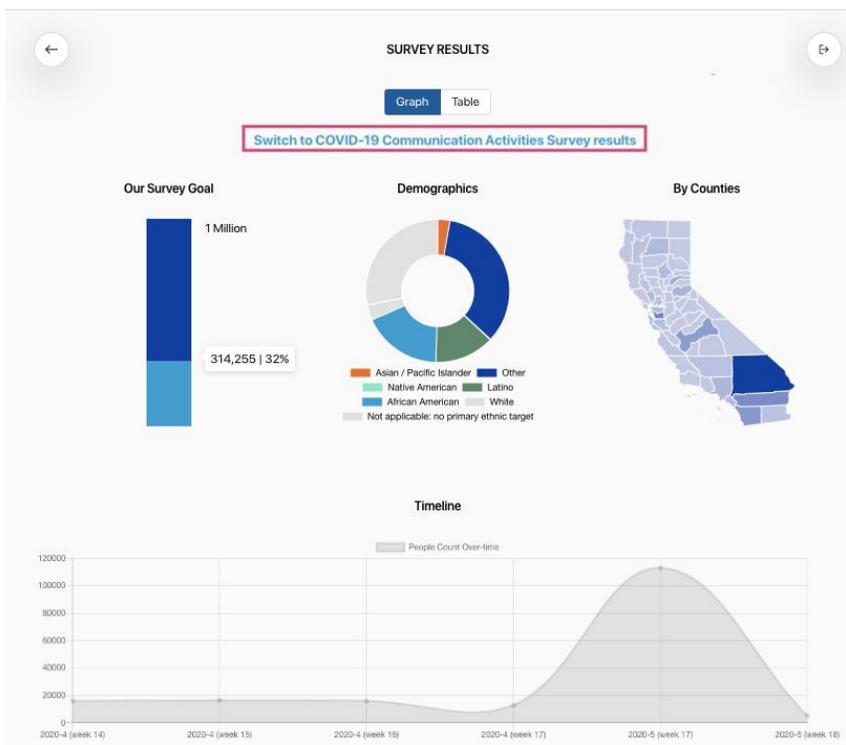
Administrators will be monitoring submitted surveys to ensure that the information that is entered by their team or sub-grantee is correct. They'll also be tracking engagement efforts, and exporting reports as needed.



Navigate to the survey results dashboards from the home screen by clicking on the **View Survey results** box.

For help or questions please visit our [Knowledge Center](#).

The default screen displays information for the collaborative efforts across all organizations involved with the Listos California Campaign and the collaborative efforts. To view the collaborative efforts of the COVID-19 Communications Activities, use the link at the top of the screen.



Toggle to the COVID-19 Reporting Dashboard by clicking [Switch to COVID-19 Communication Activities Survey results](#)



[Learn more at merits.com](https://www.merits.com)

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The **Table** button on the top of your screen will direct you to reports that are specific to your organization (and sub-grantee organizations if you have added them to your dashboard). Here you'll be able to view, monitor, edit and track communication and engagement efforts for both the Listos California Campaign **and** COVID-19 by Organization or Leader. Use the link at the top to toggle between different reporting dashboards.

**Note: The County filter includes the collaborative efforts and is not specific to your organization*

LISTOS CALIFORNIA ENGAGEMENT SURVEY RESULTS

Graph **Table**

[Switch to COVID-19 Communication Activities Survey results](#)

ORGANIZATION LEADER COUNTY

Export All Surveys Export All Participants

Organization Name	Number of Leaders	Surveys Submitted	Californians Reached	Export
Center on Disability at Public Health Institute	5	8	560	Surveys Participants
Food Bank of El Dorado County	0	0	0	

Edits can be made to submitted surveys by Administrators

Locate the specific entry to edit using the Leader view within the **Table** section of the survey results dashboard. Click **Survey List** to view, edit or export the recorded information into a printable file.

LISTOS CALIFORNIA ENGAGEMENT SURVEY RESULTS

Graph **Table**

[Switch to COVID-19 Communication Activities Survey results](#)

ORGANIZATION **LEADER** COUNTY

Export All Surveys Export All Participants

Leader Name	Organization Name	Surveys Submitted	Californians Reached	Export
Jacob Robinson	Center on Disability at Public Health Institute	7	460	Survey List
John Topete	Center on Disability at Public Health Institute	1	100	Survey List

SURVEY DETAILS

Conducted by **Jacob Robinson**
 Org **Center on Disability at Public Health Institute**

Survey List (18)

Cultural event	2020-1-14	12 people	View
Cultural event	2020-1-19	17 people	View
Cultural event	2020-1-22	21 people	View
Cultural event	2020-1-16	13 people	View
Cultural event	2020-1-16	11 people	View

Click **View**, to see more information, edit and export the recorded activity into a printable file.

SURVEY DETAILS

[← Back to survey list](#)

Survey Result [Export Survey](#) [Export Participants](#) [Edit](#)

Name of the event	Cultural event
Venue Date	2020-1-16
Venue Name	Main Civic Center
Zip Code	90020
People Interviewed	13

Export information about the survey, the list of participants recorded or edit this entry

For questions regarding your role with the Listos California Campaign please contact **Evan Schmidt** at evan.schmidt@valleyvision.org

For technical questions about how to use the tool, please contact **Merit Customer Support Team** at help@merits.com



[Learn more at merits.com](http://merits.com)

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