

## BADGING MODULE QUICK REFERENCE GUIDE

### Overview

Key aspects of badge management include working with templates, creating and issuing badges for responders and volunteers, and viewing and revoking badges.

**Note:** Responders and volunteers are both acceptable terms for the people who respond to and volunteer for incidents. Although your solution may refer to them as volunteers, responders is used throughout this document for consistency.

### Creating and Issuing Badges

When you choose to create a badge from a responder's profile, some information about the responder is automatically populated on the badge.

**Important:** Modifying the responder's information on the badge changes the information on their profile.

The screenshot displays the 'Badges' module interface. At the top, there is a 'Create Badge' button. Below it, the badge details are shown: 'Firefighter - Greenville MRC Emergency Responders' with an 'Issue Date' of 02/09/2012 and an 'Expiration Date' of 02/09/2013. A message states: 'The information for this badge has been filled in from this responder's profile. Any changes you make here will also be reflected in the responder's profile.' The form is divided into two sections: 'Badge Elements' and 'Barcode Elements'. The 'Badge Elements' section includes fields for 'Unit' (a dropdown menu), 'First Name' (Andre), 'Middle Name', and 'Last Name' (Boland). The 'Barcode Elements' section includes fields for 'Occupation' (Physician), 'Date of Birth' (02/02/1965), 'City' (Greenville), 'State' (Pennsylvania), 'Zip Code' (19204), and 'Gender' (Male). A blue arrow points to the 'Unit' dropdown menu.

Field	Value
Unit	Select
First Name	Andre
Middle Name	
Last Name	Boland
Occupation	Physician
Date of Birth	02/02/1965
City	Greenville
State	Pennsylvania
Zip Code	19204
Gender	Male

Some elements you enter to create a badge, such as Unit and Name, are visible on the badge. Meanwhile, information entered in the Barcode Elements area, such as Occupation and Date of Birth, is encoded and only readable when the badge is scanned. For more information about the visibility of badge data elements, see the Badge Barcode article in the online help available through your solution.

## To Create a Badge

1. On a responder's profile, go to **Profile: Badges**.
2. On the upper left, click **Create Badge**. The create badge page opens.
3. Enter the name of the badge.
4. In the **Template** list, click the template you want to use to create this badge.
5. In the *Badge Elements* and *Barcode Elements* areas, enter the required information.
6. To see what the badge will look like, click **Preview**.
7. When you are ready, click **Save**.

## To Issue a Badge

1. On a responder's profile, go to **Profile: Badges**. Badges that can be issued to the responder are displayed.
2. Locate the badge you want to issue and, in the *Badge Details* area, click **Issue Badge**. The badge page opens.

### Badge Details

Badge Name:	<b>Physician</b>
Badge Number:	DT001UA000000700
Badge Status:	Not Issued
Template:	<b>Emergency Responder</b>

Issue Badge



3. Enter the expiration date.
4. Click **Issue**.

# Viewing and Revoking Badges

You can view badges to check their status, which indicates whether the badge is in use or not, and why.

- **Not Issued** – The badge was created, but has never been issued to a responder.
- **Valid** – These badges were issued, and they are valid until the specified expiration date or until they are revoked by an administrator.
- **Invalid** – These badges are no longer valid because they have expired or been revoked. The reason they are not valid appears as the sub-status (for example, Invalid: Expired).

## To View Badges

1. Go to **Administration: Badging**. The *All Badges* page opens.

**Note:** By default, only *Valid* badges are displayed on the *All Badges* page. To view expired and revoked badges, in the **Status** list, click **Invalid**.

2. To sort or filter badges, take one or both of these actions.
- a. In the **Sort By** list, click the data element you want to use to organize the badges.
  - b. Use the **Display Filter** to filter the badges by **Status** and/or **Template**.

Home	My Profile	Missions	Messages	Documents	Responders	Administration	Configurations
Reports	Accounts	Export	Credential Verification	Integrations	Background Check	Badging	

### All Badges

↳ All Badges Templates

Sort By: Responder Name

Display Filter: Status: Valid Template: All

	<b>Alina Abdullah</b> Volunteer Paramedic	<b>Issue Date:</b> 02/06/2012 <b>Expiration Date:</b> 02/06/2013
	<b>Alina Abdullah</b> Volunteer Firefighter	<b>Issue Date:</b> 02/06/2012 <b>Expiration Date:</b> 02/06/2013
	<b>David Abney</b> Volunteer EMT - DMAT	<b>Issue Date:</b> 02/06/2012 <b>Expiration Date:</b> 02/06/2013


3. To get more information about a badge, take these actions.
  - a. Click a responder's name to view the badges on their profile.
  - b. Click the badge name to view the badge details page.

**Note:** On the badge details page, you can view changes through the *Badge Change Log*.

## To Revoke a Badge

1. Go to **Administration: Badges**.
2. Click the responder's name. The responder's profile window opens.
3. Click the badge you want to revoke. The *Badge Details* page opens.
4. Click **Revoke Badge**. A confirmation page opens.

### Badge Details

Badge Name:	<b>Physician</b>
Badge Number:	DT001UA000000700
Badge Status:	Issued
Template:	<b>Emergency Responder</b>
<input type="button" value="Download PDF to Print"/> <input type="button" value="Revoke Badge"/> 	

5. Enter the reason for revoking the badge and, if necessary, provide additional details to explain the situation.
6. Click **Revoke**.

### Note:

- When a badge has been lost, stolen, or damaged, we recommend you revoke it to avoid unauthorized use.
- To replace a revoked badge, you can create a new one.
- Badges that have been revoked cannot be reprinted