Task Book for the Positions of ALL-HAZARDS

COMPENSATION/CLAIMS UNIT LEADER (COMP-AH) PROCUREMENT UNIT LEADER (PROC-AH) TIME UNIT LEADER (TIME-AH) COST UNIT LEADER (COST-AH)

This Position Task Book has direct entry positions and includes tasks for the following positions;

Personnel Time Recorder

Equipment Time Recorder

Version: July 2016



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POSITION TASK BOOK ASSIGNED TO					
INDIVIDUAL'S NAME					
DUTY STATION					
PHONE NUMBER					
E-MAIL					
Provide PTB Initiation information on following page(s) for appropriate position.					

The All-Hazards Incident Management Teams Association (AHIMTA) was founded in 2010, as a grassroots 501(c) (6) professional association comprised of several hundred incident management practitioners from multiple disciplines representing Federal, State and local agencies, nongovernmental organizations (NGOs), and the private sector. The main driving factor for the creation of the Association was the critical need for standardized qualifications for All-Hazards Incident Management Teams (AHIMTs), particularly at the Type 3 complexity level for interstate deployment. In 2013 The AHIMTA formed the Incident Qualifications System Committee (IQS) to further the ICS qualifications guidance work started at the Federal level. After a year of development, stakeholder input, and vetting the first edition of the Interstate Incident Management Team Qualifications Systems (IIMTQS) Guide was published in March of 2014.

This Position Task Book (PTB) was developed and is owned and maintained by the AHIMTA as one of the components of its *Interstate Incident Management Team Qualifications System*. Any comments, corrections, or suggestions to this PTB or to any component of its *Interstate Incident Management Team Qualifications System* should be emailed to the All-Hazards Incident Management Teams Association. AHIMTA@AHIMTA.org

Common Tasks Section needs to be completed only once after the PTB is initiated the first time.

All-Hazards Compensation/Claims Unit Leader (COMP-AH) Section Was initiated by

Trainee's Name					
Official's Name					
Title					
Duty Station					
Phone Number					
E-Mail					
Was initiated at					
Location					
Date					
Common Tasks Section needs to be completed only once after the PTB is initiated the first time.					
All-Hazards Procurement Unit Leader (PROC-AH) Section					
All-Hazards Procurement Unit Leader (PROC-AH) Section Was initiated by					
Was initiated by					
Was initiated by Trainee's Name					
Was initiated by Trainee's Name Official's Name					
Trainee's Name Official's Name Title					
Was initiated by Trainee's Name Official's Name Title Duty Station					
Was initiated by Trainee's Name Official's Name Title Duty Station Phone Number					
Trainee's Name Official's Name Title Duty Station Phone Number E-Mail					

Common Tasks Section needs to be completed only once after the PTB is initiated the first time.

All-Hazards Time Unit Leader (TIME-AH) Section

Trainee's Name					
Official's Name					
Title					
Duty Station					
Phone Number					
E-Mail					
Was initiated at					
Location					
Date					
Common Tasks Section needs to be completed only once after the PTB is initiated the first time. All-Hazards Cost Unit Leader (COST-AH) Section Was initiated by					
Trainee's Name					
Official's Name					
Official's Name Title					
Title					
Title Duty Station					
Title Duty Station Phone Number					
Title Duty Station Phone Number E-Mail					

ALL-HAZARDS COMPENSATION/CLAIMS UNIT LEADER (COMP-AH)

Trainee Name:				
FINAL EVALUATOR'S VERIFICATION:				
Evaluator: DO NOT complete this unless you are recommending the trainee for certification.				
I verify all tasks have been performed and are documented with appropriate initials.				
I also verify the trainee should be considered for certification in this position.				
Evaluator's Signature				
Date				
Evaluator's Printed Name				
Title				
Duty Station				
Phone Number				
E-Mail				
CERTIFYING OFFICIAL FOR CERTIFICATION				

Trainee Name:
Has met all requirements for qualification in this position is certified for the position.
Official's Signature:
Date
Official's Printed Name
Title
Duty Station
Phone Number
Email

PROCUREMENT UNIT LEADER (PROC-AH)

Trainee Name:				
FINAL EVALUATOR'S VERIFICATION:				
Evaluator: DO NOT complete this unless you are recommending the trainee for certification.				
I verify all tasks have been performed and are documented with appropriate initials.				
I also verify the trainee should be considered for certification in this position.				
Evaluator's Signature				
Date				
Evaluator's Printed Name				
Title				
Duty Station				
Phone Number				
E-Mail				
CERTIFYING OFFICIAL FOR CERTIFICATION				

Trainee Name:
Has met all requirements for qualification in this position is certified for the position.
Official's Signature:
Date
Official's Printed Name
Title
Duty Station
Phone Number
Email

ALL TIME UNIT LEADER (TIME-AH)

Trainee Name:				
FINAL EVALUATOR'S VERIFICATION:				
Evaluator: DO NOT complete this unless you are recommending the trainee for certification.				
I verify all tasks have been performed and are documented with appropriate initials.				
I also verify the trainee should be considered for certification in this position.				
Evaluator's Signature				
Date				
Evaluator's Printed Name				
Title				
Duty Station				
Phone Number				
E-Mail				
CERTIFYING OFFICIAL FOR CERTIFICATION				

Trainee Name:
Has met all requirements for qualification in this position is certified for the position.
Official's Signature:
Date
Official's Printed Name
Title
Duty Station
Phone Number
Email

ALL HAZARDS COST UNIT LEADER (COST-AH)

ALL HAZARDS COST ON LEADER (COST-AH)
Trainee Name:
FINAL EVALUATOR'S VERIFICATION:
Evaluator: DO NOT complete this unless you are recommending the trainee for certification.
I verify all tasks have been performed and are documented with appropriate initials.
I also verify the trainee should be considered for certification in this position.
Evaluator's Signature
Date
Evaluator's Printed Name
Title
Duty Station
Phone Number
E-Mail
CERTIFYING OFFICIAL FOR CERTIFICATION
Trainee Name:
Has met all requirements for qualification in this position is certified for the position.
Official's Signature:
Date
Official's Printed Name
Title
Duty Station

Phone Number

Email

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NATIONAL INCIDENT MANAGEMENT SYSTEM (NIMS)

INCIDENT COMMAND SYSTEM (ICS) POSITION TASK BOOKS (PTBs)

Position Task Books (PTBs) are designed to be used by any individual (trainee) interested in becoming certified under the National Incident Management System (NIMS). The PTB's are intended to be used to document experiences that indicate successful completion of tasks specific to an Incident Command System (ICS) position. The performance requirements for each position are associated with core ICS competencies, behaviors and tasks as suggested to the Federal Emergency Management Agency (FEMA) by a multi-disciplined, highly experienced expert panel.

Trainees are evaluated during this process by qualified evaluators, and the trainee's performance is documented in the PTB for each task by the evaluator's initials and date of completion. An Evaluation Record will be completed by all evaluators documenting the trainee's progress after each evaluation opportunity.

Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation to the "authority having jurisdiction" (of the trainee), that the trainee be certified in that position. Evaluation and confirmation of the trainee's performance while completing all tasks will normally require more than one training assignment and several different evaluators. Incidents lasting several days may involve multiple evaluators. Tasks may be evaluated on incidents, simulation/tabletop exercise, planned events, in training and HSEEP compliant functional or full-scale exercises and in other work situations as long as there is a qualified evaluator.

It is important performances be critically evaluated and accurately recorded by each evaluator. All tasks must be evaluated.

The Interstate Incident Management Team Qualifications System [IIMTQS] Guide lists the definitions for trainee, evaluator, training officer and authority having jurisdiction.

Responsibilities:

1. Authority having jurisdiction (AHJ):

- Select trainees based on the needs of their organization or to fulfill their obligations to contribute to Incident Management Teams or other Mutual Aid agreements.
- Provide opportunities for evaluation and/or making the trainee available for evaluation.

2. Training Officer:

- Providing the correct version of the PTB to the individual in order to document performance.
- Explaining to the trainee the purpose and processes of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Identifying incidents or situations where the trainee may have evaluation opportunities.
- Identifying and assigning an evaluator who can provide a positive experience for the trainee, when the evaluation opportunity is within the AHJ's jurisdiction.
- Receiving and filing documentation from the assignment.

3. The Individual/ Trainee:

- Reviewing and understanding instructions in the PTB.
- Identifying desired objectives/goals whenever an opportunity for evaluation is recognized.
- Providing background information to an evaluator.
- Assuring the evaluation record is complete.
- Completing all tasks for an assigned position within the timeframe allowed for that position. All tasks with an approval older than the allowed timeframe must be reevaluated.

- Notifying the local AHJ /training officer when the PTB is completed, and obtaining the appropriate signature recommending certification.
- Retaining the original PTB and provide a copy of the PTB to the appropriate individual for review by the State Qualification Review Committee (SQRC) (refer to the current edition of the IIMTQS Guide).

4. Evaluator(s):

- Being qualified and proficient in the evaluated position.
- Meeting with the trainee and determining past experience, current qualifications and desired objectives/goals.
- Reviewing tasks with the trainee.
- Explaining to the trainee the evaluation procedures that will be utilized and which tasks may be performed during the evaluation period.
- Accurately evaluating and recording demonstrated performance of tasks. Dating and initialing completion of the task to indicate satisfactory performance. Unsatisfactory performance should also be documented.
- Evaluate the numbered tasks only. Do not evaluate bullets as they are provided as examples or additional clarification.
- Completing the Evaluation Record found at the end of each PTB.
- Completing an Incident Personnel Performance Rating (ICS 225) form.

5. The **Final Evaluator:**

- Being qualified and proficient in the position being evaluated.
- Reviewing the trainee's record to ensure completeness.
- Signing the appropriate verification statement found in the beginning of the PTB when all tasks have been initialed.
- Ensuring all tasks have been completed within the three years prior to submission for final approval.

6. Incident Training Specialist

- Issue the PTB with concurrence of employing/sponsoring organization to document task performance.
- Identify incident evaluation opportunities.
- Assist trainees, coaches/trainers and evaluators with proper documentation.
- Conduct progress reviews and answer questions.
- Ensure that coach/trainer and evaluators are qualified and can make accurate and honest appraisal of the trainee's performance.

Position Tasks and Associated Task Book Codes

Each Position Task Book lists the performance requirements (tasks) for specific positions set by the latest version of ICS competencies and behaviors recognized by FEMA's National Integration Center and posted to the NIMS Resource Center Web site, http://www.fema.gov/media-library/assets/documents/11685.

The tasks required of a position range in criticality. A Trainee must demonstrate competency at critical tasks while functioning in the target position on an incident. The IIMTQS recognizes that the nature of some less critical tasks may be performed on planned events, in exercises, or in other situations and be sufficient demonstration of competency upon which to base qualification.

Each task in this Position Task Book has at least one code associated with the situation(s) within which the task MUST be completed. Performance of any task in a situation(s) other than that required by the task's code(s) is not valid for qualification.

If more than one code is listed, the task may be completed in any of the situations (e.g. If code **I1**, **I2**, and **O1** are listed, the task may be completed in any of the three situations). The evaluator should circle the evaluation code for which the task was evaluated.

Definitions for these codes are:

- **I1** = Task must be performed on an incident which meets the following criteria:
 - Is managed under the Incident Command System (ICS)
 - Requires a written Incident Action Plan (IAP)
 - Requires using the Planning P to plan for multiple operational periods
 - Matches or is higher complexity level (see IIMTQS Appendix A Incident Complexity Analysis Chart) than the type rating being pursued
- **I2** = Task can be performed in the following situations:
 - Incident
 - Incident within an Event or Incident

The situation must meet the following criteria:

- o Is a critical time-pressured, high-consequence incident managed under the Incident Command System (ICS)
- Matches or is higher complexity level (see IIMTQS Appendix A Incident Complexity Analysis Chart) than the type rating being pursued
- **O1** = Task can be performed in the following situations:
 - Planned Event
 - "Full Scale Exercise" or "Functional Exercise" as defined by HSEEP (see IIMTQS Section XIII. Qualifying Incident, Event, and Exercise Guidelines; Qualifying Exercise Attributes)

This situation must meet the following criteria:

- o Is managed under the Incident Command System (ICS)
- Matches or is higher complexity level (see IIMTQS Appendix A Incident Complexity Analysis Chart) than the type rating being pursued
- Requires a formal written Incident or Event Action Plan (IAP/EAP)
- o Requires using the Planning P to plan for multiple operational periods
- o For an Event, requires contingency planning for an Incident within the Event.

- **O2** = Task can be performed in the following situations if the situation affords the opportunity to evaluate the knowledge/skills associated with the ICS position:
 - Planned Event not meeting the requirements in O1.
 - Exercise not meeting the requirements in O1.
 - Training
 - Daily Job
- **R** = Rare events seldom occur and opportunities to evaluate Trainee performance in real settings are limited. Examples of rare events include accidents, injuries, vehicle and aircraft crashes. Through interviews, the evaluator may be able to determine if the trainee could perform the task in a real situation.

There are numerous bullet statements listed under each task. The bullet statements are listed as guidelines/examples for the evaluator to consider when insuring the intent of the task has been completed. Not all bullet statements for a task are required to be completed if the overall intent of the task has been satisfied.

This task book contains tasks for the All Hazards positions of

COMPENSATION/CLAIMS UNIT LEADER (COMP-AH)

PROCUREMENT UNIT LEADER (PROC-AH)

TIME UNIT LEADER (TIME-AH)

COST UNIT LEADER (COST-AH)

The common tasks for these positions are listed first and only need to be completed once.

The tasks specific to each position are listed following the common tasks.

Finance/Administration Unit Leaders Common Tasks	Pages	17-23	tasks	1–43
Compensation/Claims Unit Leader (COMP-AH) Specific Tasks	Page	24-25	tasks	44-52
Procurement Unit Leader (PROC-AH) Specific Tasks	Pages	26-27	tasks	53-63
Time Unit Leader (TIME-AH) Specific Tasks	Pages	28-29	tasks	64-89
Cost Unit Leader (COST-AH) Specific Tasks	Pages	30-32	tasks	90-101

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The following Competencies, Behaviors, and Tasks (1 through 43) are common for all the Unit Leader positions in this task book and need to be evaluated once unless the evaluator of an additional Unit Leader position feels the trainee needs to be reevaluated on some or all the Common Task and is noted on the Evaluation Record.

Competency: Assume position responsibilities.

Description: Successfully assume role of All Hazards Unit Leader within the Logistics Section and initiate position activities at the appropriate time according to the following behaviors.

	TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task		
В	Behavior: Ensure readiness for assignment.					
1.	Obtain and assemble information and materials needed for a response	I1				
the assignr	kit prior to receiving an assignment, including critical items needed for	12				
	the assignment and items needed for functioning during the first 48 hours. The following items are suggested as basic information and	01				
	materials kept in a go bag:	02				
	 ICS forms and logs applicable to position Tools and supplies applicable to position 					
2.	Obtain information prior to deployment.	l1				
	 Incident type, name, and number 	12				
	Travel authorization number Constitution to the product of t	01				
	Specific job assignmentName and phone of supervisor if available	02				
	Reporting time and location					
	Transportation arrangementsContact procedures during travel					
	Expected duration of assignment					
	Expected working conditions					
3.	Check in at designated incident check-in location and complete check-in documentation.	11				
		12 01				
		02				
4.	Report to the Planning Section Chief or Training Specialist (if staffed) to check in as a trainee.	I1				
		01 02				
5.	Organize workspace and keep unit operating.	I1				
	 Order staff, materials and supplies using procedures established by the section chief 	12				
	 Maintain quantities of forms, supplies, equipment, and materials at a level to prevent shortage of any basic needed items Track orders and confirm time of arrival 	01				

All-Hazards Finance Section Unit Leaders Common Tasks

July 2016

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

	TASK	C O D	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
Вє	havior: Ensure availability, qualifications, and capabilities of resourc	es to	complete a	assignment.
6.	Determine unit support needs and staffing requirements to meet the Incident Action plan (IAP) or other relevant plans. • Request and document additional staffing established by the section chief	11 01 02		
7.	Ensure that unit subordinates are qualified to perform assigned positions.	l1 01		
8.	Develop Unit Operating Plan. • Include Continuity of Operations	11 01 02		
Be	havior: Gather, update, and apply situational information relevant t	o the	assignmen	it.
9.	 Obtain initial briefing and information from Incident Supervisor. Policies and operating procedures (e.g., ordering resources and supplies, work schedule, timelines and priorities) Operational work period 	11 01 02		
	 Current unit staffing levels General orientation to the Incident Command Post and/or incident base Incident briefing; Incident Action Plan (IAP) or other relevant plan Expectations for attending meetings/briefings Safety concerns/hazards Political/sensitive information considerations 			
10.	 Establish situation awareness pertinent to unit. Determine EOC or other support Organizational contacts (e.g., counterparts, host unit personnel) Supporting documentation (e.g., maps; digital information; Resource Orders) 	11 12 01 02		
Вє	havior: Establish effective relationships with relevant personnel.			
11.	Establish and maintain positive interpersonal and interagency working relationships. • Federal, State, Local, Tribal, Non-Governmental Organizations	11 01		
	chavior: Establish organization structure, reporting procedures, and sources.	chain	of comma	nd of assigned
12.	Organize assigned personnel to meet the needs of the unit.	11 01 02		
Вє	havior: Understand and comply with ICS concepts and principles.			
13.	Coordinate with functional areas within the ICS structure.	11 2 01		

Competency: Lead assigned personnel.

Description: Influence, guide, and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.

	TASK	C O D	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
Ве	havior: Model leadership values and principles.			
14.	Exhibit principles of duty.	I1		
	Be proficient in your job, both technically and as a leader	12		
	 Make sound and timely decisions Ensure tasks are understood, supervised and accomplished 	01		
	 Develop your subordinates for the future 	02		
15.	Exhibit principles of respect.	I1		
	Know your subordinates and look out for their well- being	12		
	 Keep your subordinates informed Build the team 	01		
	 Employ your subordinates in accordance with their capabilities 	02		
16.	Exhibit principles of integrity.	I1		
	Know yourself and seek improvement	12		
	 Seek responsibility and accept responsibility for your actions Set the example 	01		
	Jet the exumple	02		

Behavior: Ensure the safety, welfare, and accountability of assigned personnel.

17.	Provide for the safety and welfare of assigned resources.	I1	
	 Be alert to, and monitor the health and welfare of assigned resources 	12	
	Account for assigned resources	01	
	 Provide for care of assigned personnel and notify supervisor in event of sickness, injury, or accident 	02	
	 Ensure adequate rest, hydration, and nutrition is provided to all unit personnel 		
	Recognize any special medical needs of all unit personnel		
	 Recognize, mitigate and communicate potentially hazardous situations 		
	 Recognize, mitigate and communicate potentially hazardous situations 		
	 Provide safety and identifying equipment, such as vests identifying the communications function, flashlights, and glow sticks 		
	 Ensure that special precautions are taken when extraordinary hazards exist 		

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Establish work assignments and performance expectations, monitor performance, and provide feedback.

18.	Ensure subordinates understand assignment for operational period.	11 12 01 02	
19.	Ensure subordinates have the ability to clearly understand and give instructions in the incident's common language.	11 12 01 02	
20.	Develop units' schedule/assignments based on IAP relevant plan.	11 O1 O2	
21.	Complete daily review of units staffing requirements and ensure adequate personnel to meet needs.	11 01	
22.	 Evaluate subordinate's performance. Communicate deficiencies immediately and take corrective action Provide training opportunities where available Complete personnel performance evaluations according to agency guidelines 	11 12 01 02	

Behavior: Emphasize teamwork.

23.	Establish cohesiveness among assigned resources.	11	
	Provide for open communication	12	
	Seek commitment	01	
	Set expectations for accountability		
	Focus on the team result		

Competency: Communicate effectively.

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment.

TASK	C O D	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Ensure relevant information is exchanged during briefings and debriefings.

24.	Brief and keep subordinates informed and updated. • Ensure unit leader expectations are communicated and understood.	11 12 01 02	
25.	Participate in incident operational briefings and meetings as directed. • Record corrections to documents (e.g., IAP, maps) • Provide information as requested	11 12 01 02	
26.	Participate in functional area briefings .	11 12 01 02	
27.	Conduct unit After Action Reviews (AARs).	11 12 01 02	

Behavior: Ensure documentation is complete and disposition is appropriate.

28.	Review and approve subordinate time reports.	I1 I2 O1 O2	
29.	Submit documentation to Documentation Unit Leader or appropriate agency representative within established timeframes. • General Message, ICS 213 • Activity Log, ICS 214	11 01 02	
30.	Compile unit documentation for final incident package.	11 01	
31.	Prepare units input for transition plan as requested.	11 01	
32.	Prepare units input for final narrative as requested.	11 01	

TASK	C O D	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Gather, produce and distribute information as required by established guidelines and ensure understanding by recipient.

33.	Prepare unit information for briefings and meetings.	I1	
		01	

Behavior: Communicate and ensure understanding of work expectations within the chain of command and across functional areas.

34.	Coordinate across functional areas. • Provide timely feedback in response to requests • Communicate, Cooperate, and Coordinate	I1 I2 O1 O2	
35.	Establish protocols and set time frames for information exchange to appropriate section to complete work assignments. • IAP inputs • Incident Status Summary (ICS 209) • Tentative releases	11 01 02	

Behavior: Develop and implement plans and gain concurrence of affected agencies and/or the public.

36.	Support the development of plans. Incident Action Plan (IAP) Contingency/Continuity of Operations (COOP) Equipment breakdown Power outages Unexpected staffing shortages Incident within the incident	11 O1			
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Competency: Ensure completion of assigned actions to meet identified objectives.

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established timeframe.

Behavior: Follow established procedures and/or safety procedures relevant to given assignment.

37.	 Ensure established guidelines are followed. Work/rest Personal protective equipment (PPE) when required for field assignments 	l1 O1	
	 Communication (e.g., radio, cell phone) 		

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Transfer position duties while ensuring continuity of authority and knowledge and taking into account the increasing or decreasing incident complexity.

38.	Coordinate an efficient transfer of position duties when mobilizing (e.g., host agency/outgoing Incident Management Team (IMT). • Inform subordinate staff and supervisor as appropriate • Document follow-up action needed and submit to supervisor	I1 O1	
39.	Coordinate an efficient transfer of position duties when demobilizing [e.g., incoming Incident Management Team (IMT), host agency]. • Inform subordinate staff and supervisor as appropriate • Document follow-up action needed and submit to supervisor	I1 O1	

Behavior: Plan for unit demobilization and ensure demobilization procedures are followed.

40.	Anticipate demobilization of unit resources. • Identify excess resources • Prepare schedule for demobilization	11 O1	
41.	 Ensure demobilization of unit resources. Brief subordinate staff on demobilization procedures and responsibilities Ensure incident and agency demobilization procedures are followed. 	11 01	
42.	 Demobilize and check out. Receive demobilization instructions from incident supervisor If required, complete Demobilization Check-out, ICS 221 and submit completed form to the appropriate person 	11 O1	
43.	Demobilize equipment as needed. • Documentation of lost/missing equipment or supplies	11 01	

Behavior: Take appropriate action based on assessed risk.

44.	Apply a risk management process. • Situation Awareness	I1	
	Hazard AssessmentHazard Control	12	
	 Decision Point Evaluate 	01	

 $\label{lem:eq:continuous} Evaluate\ the\ numbered\ tasks\ ONLY.\ DO\ NOT\ evaluate\ bullets;\ they\ are\ provided\ as\ examples/additional\ clarification.$

The following competencies, Behaviors, and Tasks (44 through 52) are specific to the position of Compensation/Claims Unit Leader and should be completed only by those individuals who are working towards becoming qualified in that Position.

Competency: Assume position responsibilities.

Description: Successfully assume role of All Hazards Compensation/Claims Unit Leader within the Finance/Administration Section and initiate position activities at the appropriate time according to the following behaviors.

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Ensure availability, qualifications, and capabilities of resources to complete assignment.

45.	Establish secure and confidential interview location.	I1 O1	
46.	Develop access to check in and employment information of all incident responders.	11 01	
47.	Follow employee incident from initial report through to return to home unit.	I1 O1	

Competency: Lead assigned personnel.

Description: Influence, guide, and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.

Behavior: Coordinate interdependent activities.

48.	Coordinate and interact with host incident agency. • Daily report of comp/claims cases • Establish relationship with purchasing officials	11 01	
49.	Establish relationship with the Medical Unit.	11 01	
50.	Initiate communications and protocols with potential patient care facilities. • Hospitals, clinics, care facilities • Payment procedures	11 O1	

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

Competency: Communicate effectively

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment.

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task	
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Behavior: Ensure documentation is complete and disposition is appropriate.

51.	Provide input for the Incident Status Summary (ICS 209).	I1 O1	
52.	 Maintain appropriate documentation. Host agency property damage or replacement forms Host agency Worker Compensation forms 	I1 01	
53.	Review paperwork for accuracy and ensure case files are completed and transmitted to the appropriate administrative processing agency. • Determine proper documentation for incident personnel is completed	I1 O1	

The following competencies, Behaviors, and Tasks (53 through 63) are specific to the position of Procurement Unit Leader and should be completed only by those individuals who are working towards becoming qualified in that Position.

Competency: Lead assigned personnel.

Description: Influence, guide, and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.

	TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
В	ehavior: Coordinate interdependent activities.			
54.	Coordinate and interact with host incident agency. • Procurement staff - ensure agency guidelines are followed • Payment team - meet specific requirements	I1 O1		
55.	Provide contract administration guidance to logistics and operations. • Emergency Equipment Rental Agreements • Shift time records • Fuel issues • Double shifts • Contract disputes • Contractor billing statements	11 O1		

Competency: Communicate effectively.

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment.

Behavior: Ensure documentation is complete and disposition is appropriate.

56.	Ensure auditing process is followed.	I1 O1	
57.	Review paperwork for accuracy and ensure payment packages are completed and transmitted to appropriate administrative processing agency.	11 01	
58.	Ensure time is recorded and other relevant documents are completed for contracted resources.	I1 O1	
59.	Establish tracking method for fuel, repair and commissary issues.	I1 O1	
60.	Provide information for cost containment effort, as requested.	I1 O1	

Competency: Ensure completion of assigned actions to meet identified objectives.

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established timeframe.

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completio n of task
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Behavior: Administer and/or apply agency policy, contracts and agreements.

61.	Ensure agreement and contract documents are in place to meet	I1	
	incident needs and are properly administered.	01	
	Refer contractor claims or disputes to Contracting Officer for		
	resolution		

Behavior: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.

62.	Review excessive shift lengths and ensure mitigation measures are documented.	I1 01	
63.	Coordinate with Cost Unit Leader.	l1 01	

Behavior: Plan for demobilization and ensure demobilization procedures are followed.

64.	Restrict purchases of fuel, and/or equipment repairs based on	I1	
	demobilization schedule.	01	

The following competencies, Behaviors, and Tasks (64 through 89) are specific to the position of Time Unit Leader and should be completed only by those individuals who are working towards becoming qualified in that Position.

NOTE: Some qualification systems have the Equipment Time Recorder in the Ground Support Unit and others in the Procurement Unit; the IIMTQS has retained this position and Personnel Time Recorder in the Time Unit.

Competency: Demonstrate knowledge and ability to perform subordinate ICS positions.

Description: **Direct Entry** positions allow an individual to train and be qualified in this Unit Leader position without being qualified in subordinate positions. This behavior and associated task(s) are not required if the trainee is already qualified in the subordinate position.

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion
			of task

Behavior: Demonstrate knowledge and ability to perform the Personnel Time Recorder that is subordinate to this unit.

65.	Establish filing system for incident personnel time reports.	l1 O1	
66.	Close out time documents prior to personnel leaving the incident.	I1 01	
67.	 Initiate a time report for personnel assigned to the incident. Determine time report documentation needed for incident personnel 	l1 O1	
68.	Post, or update time for personnel assigned to the incident.	I1 01	
69.	Ensure employee identification information is verified (Resource Order number, employee type, and position).	I1 O1	
70.	Post commissary issues to personnel time documents.	R	
71.	Ensure time reports have been signed by an appropriate supervisor.	1 01 02	

Behavior: Demonstrate knowledge and ability to perform the Equipment Time Recorder that is subordinate to the unit.

72.	Set up Equipment Time Recorder function in location designated by supervisor.	l1 01	
73.	Assist resources, ground support and facilities units in establishing a system for collecting equipment time reports.	l1 O1	
74.	Prepare payment document for equipment as required and per host agency policy.	l1 O1	

All Hazards Time Unit Leader (TIME-A	۱H) S	pecific	Tasks
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July 2016

 $\label{lem:eq:continuity} \textit{Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.}$

All Hazards Time Unit Leader (TIME-AH) Specific Tasks

July 2016

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Demonstrate knowledge and ability to perform the Equipment Time Recorder that is subordinate to the unit

75.	Post equipment time after each operational period.	l1 01	
76.	Maintain current posting on charges or credits for fuel, parts, services and commissary.	11 01	
77.	Verify equipment time data and deductions with owner or operator of equipment.	I1 01	
78.	Complete Equipment Time forms according to host agency specifications.	I1 01	
79.	Close out Equipment Time forms prior to demobilization; distribute copies per host agency and incident policy.	I1 01	

Competency: Lead assigned personnel.

Description: Influence, guide, and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.

Behavior: Coordinate interdependent activities.

80.	Advise incident personnel on pay and travel regulations, policies and procedures.	l1 01	
	Work/rest guidelines		
	Agency specific hiring and payment processes and proceduresAssignment extensions		
	Meal breaks		
	 Hazard/environmental pay 		

Competency: Communicate effectively.

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment.

Behavior: Ensure documentation is complete and disposition is appropriate.

•	 Ensure auditing process is established. Continuation of pay, mandatory days off, and deductions are posted 	l1 01	
	 Brief subordinate personnel. Personnel Time Recorder Equipment Tine Recorder 	R	

All Hazards Time Unit Leader (TIME-AH) Specific Tasks

July 2016

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Ensure documentation is complete and disposition is appropriate.

83.	Review paperwork for accuracy and ensure payment packages are completed and transmitted to appropriate administrative processing agency.	I1 01	
84.	Brief Finance/Administration Section Chief on current problems and recommendations, outstanding issues and follow-up requirements.	I1 01	
85.	Ensure paperwork is completed for hiring of emergency workers.	R	
86.	Submit cost estimate data to Cost Unit as required.	I1 01	

Competency: Ensure completion of assigned actions to meet identified objectives.

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established timeframe.

Behavior: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.

87.	Review excessive shift lengths and ensure mitigation measures are	I1	
	documented.	01	

Behavior: Plan for demobilization and ensure demobilization procedures are followed.

88.	Schedule resource demobilization with appropriate incident units.	11 01	
89.	Ensure that personnel time records are current or complete prior to demobilization.	I1 01	
90.	Ensure equipment records are current or completed prior to demobilization.	l1 01	

The following competencies, Behaviors, and Tasks (90 through 101) are specific to the position of Cost Unit Leader and should be completed only by those individuals who are working towards becoming qualified in that Position.

TASK	C O D	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Competency: Lead assigned personnel.

Description: Influence, guide, and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.

Behavior: Coordinate interdependent activities.

91.	Establish information flow with other cost centers. • Air Support	11 01	
	 Facilities 		
	 Procurement 		

Competency: Communicate effectively.

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment.

Behavior: Ensure relevant information is exchanged during briefings and debriefings.

92.	Provide input for the Incident Status Summary (ICS 209).	I1 O1	
93.	Coordinate cost estimates to host agency and incident personnel per Host Agency guidelines.	l1 01	

Behavior: Ensure documentation is complete and disposition is appropriate.

94.	Document incident costs according to direction, timeframes, and regulations.	l1 01	
95. •	Finalize cost documentation. Coordinate completion of incident finance package with Finance Section Chief and Host Agency Having Jurisdiction.	l1 01	

Competency: Ensure completion of assigned actions to meet identified objectives.

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established timeframe.

Behavior: Administer and/or apply agency policy, contracts and agreements.

96.	Assist with the development of cost share agreements.	I1 O1	
97.	Track costs in accordance with established cost share agreements.	l1 01	

All-Hazards Cost Unit Leader (COST-AH) Specific Tasks Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

July 2016

TASK	C O D E	Evaluation Record Number	EVALUATOR: Initial & date upon completion of task
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Behavior: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.

98.	Verify incident resources with Planning Section.	I1 O1	
99.	Provide information for cost containment effort, as requested. • Coordinate with Procurement Unit Leader and other cost centers	l1 01	
100.	 Ensure resources are entered and tracked in the applicable cost reporting program. Validate rates within the applicable cost reporting program for accuracy by geographic area Provide projections as necessary 	l1 01	

Behavior: Utilize information to produce outputs.

101.	Ensure cost packages are completed and distributed in accordance with agency policy.	l1 O1	
102.	Ensure accruals are reported in accordance with host agency policy.	11	
		01	

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

A separate Evaluation Record needs to be completed for each incident, event, full-scale exercise, functional exercise, tabletop, daily duties, or in a classroom where a Trainee can be evaluated and is required for any task signed off in the PTB. If additional Evaluation Records are needed, a page can be copied from a blank task book and attached.

Each Evaluation Record will need to have the following information provided:

Evaluation Record #: The number at the top of the evaluation record which identifies a particular incident or group of incidents. This number should be placed in the column labeled "Evaluation Record #" on the PTB for each task performed satisfactorily. This number enables reviewers of the completed PTB to ascertain the qualifications of the different evaluators prior to making the appropriate sign-off on the PTB.

Trainee Name: Insert the Trainee's full name.

Trainee Position: Insert the Trainee's ICS Trainee position.

Evaluator's Information:

Evaluator's Name: Insert the Evaluator's full name.

Incident Position/Assignment: Identify the ICS position the Evaluator selected during this evaluation.

Evaluator's Agency/Organization: Identify the agency/organization the Evaluator is representing

Evaluator's Office Title: Identify the position or title the Evaluator has within their home agency/organization.

Agency/Organization Address: Insert the mailing address of the Agency/Organization where the Evaluator receives US mail service.

Phone and E-mail: Insert the Evaluator's phone number and e-mail address.

Evaluator's Relevant Certification Qualification System: List the evaluator's NIMS ICS certification relevant to the Trainee position supervised and the Qualification System (i.e., IIMTQS, NWCG, USCG).

Name and Location of Exercise/Event/Incident: Identify the name and location where the tasks were evaluated.

Exercise/Event/Incident Kind and Complexity: Enter type of incident (hazmat, tornado, flood, structural fire, search and rescue, tabletop exercise, full scale exercise, etc.) and complexity of incident or sub-incident that the evaluation is for by Type (Type 1, 2, 3, etc.).

Number and Type of Resources: Enter the number and type of resources assigned to the incident pertinent to the Trainee's position.

Duration: Enter inclusive dates during which the Trainee was evaluated and number of operational periods in Trainee status. This block may indicate a span of time covering small incidents/events considered (or managed) as one on-going incident if the Trainee has been evaluated on that basis.

Recommendation: Check as appropriate and/or make comments regarding the future needs for development of this Trainee.

Recommendations/Comments: Provide comments and observations of the Trainee while they were assigned to the incident/event/exercise. The ICS 225 can also be completed and used as an accompanying document to record the incident experience or it can be used as guidance on the type of information that is necessary in this section of the Evaluation Record.

Evaluator's Signature: Evaluator signs here.

Date: Indicate the calendar date the record is being completed.

Evaluator's Initial: Initial here to authenticate recommendations and to allow for comparison with initials in the PTB.

TRAINEE NAME	TRAINEE POSITION				
Evaluator's Information					
Evaluator's Name:					
Incident Position/Assignment					
Evaluator's Agency/Organization:					
Evaluator's Office Title:					
Agency/Organization Address:					
Phone and Email:					
Evaluator's Relevant Certification and Qualification Sys	stem:				
Name and Location of Exercise/Event/Incident Kind:					
Exercise/Event/Incident Type (hazmat, tornado, flood, structural fire, search and rescue, tabletop exercise, full scale exercise, etc.) and Complexity (Type 1, 2, 3, etc.):					
Number and Type of Resources Pertinent to Trainee's Position: (number of personnel being supervised, number of resources by type and kind)					
Duration: (inclusive dates in Trainee status and number	r of operational periods in Trainee status)				
Recommendation: The tasks initialed and dated by me	e have been performed under my supervision in a				
	commend the following for further development of this				
Trainee. The individual has successfully performed all tasks for the position and should be considered for certification.					
Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.					
The individual attempted but was not able to successfully complete certain tasks (comments below) or additional guidance is required.					
The individual is deficient in the performance of tasks for the position and needs further training in					
both required knowledge and skills prior to additional assignment(s) as a Trainee (comments below).					
Recommendations/Comments (Attach additional comment sheets as needed. Also see ICS-225: Incident Personnel Performance Rating):					
Evaluator's Signature:	Date:				
Evaluator's Initials:					

TRAINEE NAME	TRAINEE POSITION				
Evaluator's Information					
Evaluator's Name:					
Incident Position/Assignment					
Evaluator's Agency/Organization:					
Evaluator's Office Title:					
Agency/Organization Address:					
Phone and Email:					
Evaluator's Relevant Certification and Qualification Sys	stem:				
Name and Location of Exercise/Event/Incident Kind:					
Exercise/Event/Incident Type (hazmat, tornado, flood, structural fire, search and rescue, tabletop exercise, full scale exercise, etc.) and Complexity (Type 1, 2, 3, etc.):					
Number and Type of Resources Pertinent to Trainee's Position: (number of personnel being supervised, number of resources by type and kind)					
Duration: (inclusive dates in Trainee status and number	r of operational periods in Trainee status)				
Recommendation: The tasks initialed and dated by me satisfactory manner by the above named Trainee. I recommend Trainee.	e have been performed under my supervision in a commend the following for further development of this				
The individual has successfully performed all t certification.	asks for the position and should be considered for				
Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.					
The individual attempted but was not able to successfully complete certain tasks (comments below) or additional guidance is required.					
	of tasks for the position and needs further training in ditional assignment(s) as a Trainee (comments below). ment sheets as needed. Also see ICS-225: Incident				
Personnel Performance Rating):					
Evaluator's Signature:	Date:				
Evaluator's Initials:					

TRAINEE NAME	TRAINEE POSITION				
Evaluator's Information					
Evaluator's Name:					
Incident Position/Assignment					
Evaluator's Agency/Organization:					
Evaluator's Office Title:					
Agency/Organization Address:					
Phone and Email:					
Evaluator's Relevant Certification and Qualification Sys	stem:				
Name and Location of Exercise/Event/Incident Kind:					
Exercise/Event/Incident Type (hazmat, tornado, flood, structural fire, search and rescue, tabletop exercise, full scale exercise, etc.) and Complexity (Type 1, 2, 3, etc.):					
Number and Type of Resources Pertinent to Trainee's Position: (number of personnel being supervised, number of resources by type and kind)					
Duration: (inclusive dates in Trainee status and number	r of operational periods in Trainee status)				
Recommendation: The tasks initialed and dated by me	e have been performed under my supervision in a				
	commend the following for further development of this				
Trainee. The individual has successfully performed all tasks for the position and should be considered for certification.					
Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.					
The individual attempted but was not able to successfully complete certain tasks (comments below) or additional guidance is required.					
The individual is deficient in the performance of tasks for the position and needs further training in					
both required knowledge and skills prior to additional assignment(s) as a Trainee (comments below).					
Recommendations/Comments (Attach additional comment sheets as needed. Also see ICS-225: Incident Personnel Performance Rating):					
Evaluator's Signature:	Date:				
Evaluator's Initials:					

TRAINEE NAME	TRAINEE POSITION				
Evaluator's Information					
Evaluator's Name:					
Incident Position/Assignment					
Evaluator's Agency/Organization:					
Evaluator's Office Title:					
Agency/Organization Address:					
Phone and Email:					
Evaluator's Relevant Certification and Qualification Sys	stem:				
Name and Location of Exercise/Event/Incident Kind:					
Exercise/Event/Incident Type (hazmat, tornado, flood, structural fire, search and rescue, tabletop exercise, full scale exercise, etc.) and Complexity (Type 1, 2, 3, etc.):					
Number and Type of Resources Pertinent to Trainee's Position: (number of personnel being supervised, number of resources by type and kind)					
Duration: (inclusive dates in Trainee status and number	r of operational periods in Trainee status)				
Recommendation: The tasks initialed and dated by me	e have been performed under my supervision in a				
	commend the following for further development of this				
Trainee. The individual has successfully performed all tasks for the position and should be considered for certification.					
Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.					
The individual attempted but was not able to successfully complete certain tasks (comments below) or additional guidance is required.					
The individual is deficient in the performance of tasks for the position and needs further training in					
both required knowledge and skills prior to additional assignment(s) as a Trainee (comments below).					
Recommendations/Comments (Attach additional comment sheets as needed. Also see ICS-225: Incident Personnel Performance Rating):					
Evaluator's Signature:	Date:				
Evaluator's Initials:					

