



# NORTHERN ROCKIES FINANCE AND LOGISTICS EVALUATION

UPDATED 2022

The Finance – Logistics Evaluation includes the overall performance of the Finance Section and the administrative performance of the Logistics Section’s handling of un-operated equipment and other duties that impact finance or incident cost. The evaluation should be completed no later than 90 days following close-out with an Incident Management Team (IMT), and after payment packages have been processed and paid. Agency Administrators should coordinate with their respective incident business personnel to ensure that fair and accurate information is provided to the IMT.

<b>Incident Name:</b>
<b>Incident Management Team:</b>
<b>IMT Dates:</b>
<b>Finance Section Chief(s):</b>
<b>Logistics Section Chief(s):</b>
<b>Evaluator(s):</b>

## Finance Section

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1. Was the Finance Section familiar with and following the:

- YES  NO      NWCG Standards for Interagency Incident Business Management?
- YES  NO      NRCG Supplements?
- YES  NO      Host Agency’s Incident Business Operating Guidelines (IBOG)?
- YES  NO      Current contract administration?

Additional Comments:

2. Host Agency's fiscal expectations of Finance Section:

- YES  NO      If required by the host agency, were all Finance Section members prepared to work with current/active FireNet Teams accounts and with current/active NAP accounts for access to eSuite Enterprise?
- YES  NO      Were expectations for the final finance package identified (electronic, hard-copy or both)?
- YES  NO      Did the Finance Section communicate issues during the fire?
- YES  NO      Did the Finance Section utilize any additional assistance or personnel from the local unit (if available)?
- YES  NO      Were the Agency Administrators and Incident Business Advisor (INBA) apprised of daily costs as requested?
- YES  NO      Were the Agency Administrators and INBA apprised of daily cost share tracking as requested?

Additional comments:

3. Casuals:

- YES  NO      Were OF-288s for casual pay processed every 14 days, or as directed by the INBA and/or Host Agency?
- YES  NO      Was Forest Service AD travel completed on the OF-288 as directed in the Forest Service AD Pay Plan?

Additional comments:

4. Compensation for Injury/Claims:

- YES  NO      Was Workers' Compensation paperwork handled in accordance with the injured employee's hiring agency direction?
- YES  NO      Were Claims handled in accordance with agency policy and processes, as identified in the SIIBM or other agency internal direction?
- YES  NO      Was the INBA notified of all accidents and injuries promptly?

- YES  NO      If the COMP managed Incident Replacement, were the appropriate forms/documentation completed (including the Northern Rockies OF-289 with appropriate signature chain), and was the INBA notified in a timely manner when requests were submitted?

Additional comments:

5. Auditing and Payment Package Review and Submission:

- YES  NO      Was an auditing expectation for personnel/equipment time identified?
- YES  NO      Were audits conducted on equipment time by the PROC or FSC prior to submitting payment packages to ASC (or to host agency) so that accurate, correct invoices were submitted?
- YES  NO      Did the host incident agency request to spot audit elements of finance package?
- YES  NO      Were audits conducted on personnel time by host incident agency?  
 Full audit or  Random sampling?
- YES  NO      Were audits conducted on equipment time by the incident agency?  
 Full audit or  Random sampling?
- YES  NO      Were interim payments for vendors submitted every 14 days or as directed?
- YES  NO      Was a complete and comprehensive Batch Transmittal Log maintained in a single, searchable format, and shared with the host agency throughout the incident?
- YES  NO      Was follow-up from Logistics completed, regarding utility close-out, unoperated equipment release, LUA close out, and/or property returns to the cache or host unit?

Findings – Personnel Time:

Findings – Equipment Time:

6. Records Management:

- YES  NO      Were files/records managed as directed: hard-copy, electronic or both?
- YES  NO      Was the FireNet Teams Finance Channel managed as directed?
- YES  NO      Was the national direction for standard filing followed?
- YES  NO      Was the host unit administrative representative given owner access to the FireNet Team (if not established prior to IMT arrival)?

## Logistics Section

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1. Contract Administration and Equipment tracking:

- YES  NO      Did the Logistics section understand current contract administration for un-operated equipment?
- YES  NO      Was un-operated equipment being accurately tracked?
- YES  NO      Were rental vehicles and ATV/UTVs tracked per agency and NRCG direction?
- YES  NO      In accordance with NERV SOP, if ground support NERV Heavy Duty (4x4) rental vehicles were reassigned, was the paperwork updated appropriately for payment, and coordinated through dispatch?
- YES  NO      Were shift tickets completed correctly for un-operated equipment, or vendor-generated invoices collected, reviewed, and signed daily?
- YES  NO      Were release inspections completed in accordance with the terms and conditions of the agreement?

Additional comments:

2. Other Logistics Section duties:

- YES  NO      Did the ORDM and/or SUPL thoroughly understand the host Agency IBOG and NRCG directions to successfully serve as a filter for items requested by the IMT that were outside the standard business practices in the Northern Rockies?
- YES  NO      Did the IMT obtain AA and/or INBA signature approval for any orders for items or services that were outside the standard business practices in the Northern Rockies?

- YES  NO      Were land use agreements properly requested through the host agency's procurement process?
- YES  NO      Once in place, were LUAs properly documented, with pre-use inspections completed and final inspections conducted at end of incident; or was a plan in place to have them closed by the host agency?
- YES  NO      Were utilities (phone lines, DSL lines, satellite service, trash removal, and dumpster rental) disconnected or discontinued in accordance with Host Agency protocol or was a plan in place to have them disconnected or discontinued by the host agency after the team's departure? Was finance notified of the disposition?
- YES  NO      Did the supply unit return items to the appropriate caches and leave records behind?
- YES  NO      Did cache personnel indicate a problem with lost, damaged or destroyed items that were not returned?
- YES  NO      If the SUPL or ORDM managed Incident Replacement, were the appropriate forms/documentation completed and was the INBA notified in a timely manner when requests were submitted?
- YES  NO      Was accountable and durable property appropriately tracked and returned to the host agency or cache?
- YES  NO      Were radios properly managed (by an assigned COML), then collected and returned to the cache as required?

Additional comments:

3. Records Management:

- YES  NO      Were files/records managed as directed: hard-copy, electronic or both?
- YES  NO      Was the FireNet Teams Logistics Channel managed as directed?
- YES  NO      Was the national direction for standard filing followed?
- YES  NO      Were all files properly named (not just scanned with a generic scanner identification) for easy future reference?

# Closeout

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## Finance

- YES  NO      Were follow-up or unresolved contract or personnel issues identified?
- YES  NO      Were follow up issues resolved during closeout?
- YES  NO      Were follow-up or unresolved OWCP issues identified?
- YES  NO      Were follow-up or unresolved claims issues identified?
- YES  NO      Were EFF/AD/Casual timesheets completed and closed out according to employing agency guidelines?
- YES  NO      Was Cooperator paperwork completed in accordance with the terms of their agreements; were they given the proper documentation (i.e., original paperwork) at time of demob?

Any additional comments:

## Follow up after Closeout

- YES  NO      Is any follow up required with the Finance Section?
- YES  NO      Is any follow up required with the Logistics Section?

Any additional comments, information, accolades, or concerns:

## Completed By:

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Name:

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Email:

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Date:

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\*also cc the applicable agency Incident Business Coordinator