

SOUTHERN AREA

INCIDENT BUSINESS

MANAGEMENT

GUIDELINES

For Federal Agencies



September 17, 2018

SA INCIDENT BUSINESS MANAGEMENT GUIDELINES

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SA INCIDENT BUSINESS MANAGEMENT GUIDELINES

Introduction

This document outlines standard federal incident business management guidelines for the Southern Geographic Area (SA). These guidelines emphasize consistency in critical financial and administrative procedures, and are intended to complement the 2018 NWCG Standards for Interagency Incident Business Management Handbook (SIIBMH). The most recent version of the SIIBMH (2018) is available for download at <https://www.nwcg.gov/sites/default/files/publications/pms902.pdf>

This document replaced the Interagency Incident Business Management Handbook (IIBMH) in April 2018 and is commonly called “the yellow book”.

Information in this document and in the SIIBMH may reference or draw from information available on the Incident Business Practices website. This site was moved to a new platform in 2018 and is now available at this URL: <https://www.fs.fed.us/managing-land/fire/ibp>

In January 2018, the Southern Area Interagency Incident Business Working Team (SA IIBWT) was chartered under the SA Coordinating Group (SACG). It consists of regional Incident Business Advisors (INBAs) or other Incident Business personnel from Region 8 of the USFS, Region 4 of the USFWS, the Southeast Region of the NPS, and the Eastern Region of the BIA, as well as a representative from the Southern Group of State Foresters. It is the responsibility of each participating agency to ensure there are consistent, updated incident business guidelines for implementation in the SA. The Chairperson for the SA IIBWT will lead the effort to update these guidelines on a yearly basis, and obtain approval for publication through the SACG. The team’s charter can be found at: <https://gacc.nifc.gov/sacc/saiibwt.php>.

These guidelines have been developed to assist the Agency Administrator (AA), Unit Administrative or Budget Officer, Incident Business Advisor (INBA), and the Finance Section Chief (FSC) of Incident Management Teams (IMTs) operating in the Southern Area, and can be used for reference by incidents of all complexity levels.

Incident host units should supplement these guidelines as necessary to address issues specific to their locations while conforming to the SIIBMH. Refer to Appendix H (Local Unit Requirements).

Southern Area Expectations for Transitions

The key priorities for Finance/Administration transitions between the Incident (local unit) and IMTs in the Southern Area are to meet with Forest Administrative Personnel, Incident Commander and General Staff, outgoing FSC, Buying Teams/units, Procurement Unit Leader (PROC), and Medical Unit Leader (MEDL) to assure compliance with legal requirements and efficient use of resources. Also, to ensure applicable records management and retention policies are followed.

Incoming teams should review proposed/existing agreements, contracts, forest administrative standard business procedures, service/supply plans, accruals, and payments; and request that the INBA provide a narrative report on incident administration performance,

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recommendations, and improvements noted to date. Outgoing personnel should provide the narrative report for cost containment noted to date.

With this information in hand, incoming FSC should apply local policy and specific information, interpretations, and resources to effectively accomplish incident administration duties and strategically manage the finance/administrative units by looking to the future in earmarking resources, forecasting costs, and planning for further transitions or fire containment.

The FSC should brief the IMT, AA, INBA, and forest administration on current major incident business issues existing at the time of transition, and continue to keep the Forest abreast of the situation by working closely with the INBA and/or forest administrative personnel.

ROLES AND RESPONSIBILITIES

Agency Administrator

The Agency Administrator (AA) is the official responsible for the management of an incident. The AA may be the Forest Supervisor, Deputy Forest Supervisor or District Ranger. In the absence of an INBA, the AA is responsible for coordinating incident business responsibilities on their unit. The AA has knowledge of incident business policy and procedures in order to monitor and provide oversight for incident business activities. The AA will consult with the Forest FMO when clarification is needed or issues arise. The AA develops trigger points for activation of the individual components of the Incident Support Organization.

Buying Team

The AA makes the final determination on ordering a Buying Team (BUYT), usually at the request of the FSC and/or INBA. The BUYT Leader (BUYT-L) reports to the AA, or to the INBA if delegated by the AA. The BUYL maintains and applies thorough knowledge of federal acquisition policy as well as is knowledgeable of national, regional, local, and agency incident business policies. The BUYL ensures the team maintains an updated purchase log and proper documentation of purchases. The BUYL establishes expectations for team members and does performance evaluations for team members.

Incident Business Advisor

The Incident Business Advisor (INBA) is ordered and supervised by the AA or Line Officer from the incident agency (host unit). One or more fully qualified INBAs are normally brought in to assist the AA on Type 1 or 2 incidents. Given the lack of qualified INBAs in the federal sector, it is highly encouraged that INBA trainees are brought in as well.

For incidents managed by FS units in the SA, ordering of the INBA will need to be coordinated with the Regional Incident Business Coordinator.

Other federal agencies may follow standard dispatch procedures to order an INBA, or they may choose to name request if they deem it necessary.

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Specific responsibilities of the INBA are defined in the letter of delegation issued by the AA, see Appendix D, and are also stated in Chapter 80, Responsibilities, of the SIIBM (yellow book). The INBA serves as an advisor to the AA, and as liaison between the AA and the IMT. The INBA provides recommendations on incident business issues, and works closely with the Finance & Logistics Section Chiefs. The INBA usually is delegated supervision of the BUYT by the AA. The INBA provides advice and recommends alternatives with an emphasis on cost tracking, reporting and containment. The INBA will participate in the closeout/transition meeting. The INBA will provide a verbal assessment of: 1) commendable performance, 2) things that went well, and 3) things needing improvement.

Upon completion of assignment, the INBA will complete an incident business narrative and submit it to the AA, with a copy to the regional and host agency Incident Business Coordinator. The INBA also performs an evaluation of the BUYT. The performance evaluation for the BUYT and their team members are provided to the Regional Buying Team Coordinator. This information will be utilized to assess the regional capabilities, training needs, and for inclusion on post-incident "After Action Reviews" (AARs). Lessons learned will be covered during the regional Incident Procurement and/or Buying Team biannual workshop, and annual Incident Business workshop.

Personnel

ADs/Casuals

Resource orders will be filled in the order of Agency, Cooperator and Administratively Determined (AD) resources, provided they can meet the time and date needed.

The incident agency is responsible for either retaining the authority for hiring casuals or delegating it to the IMT. If the incident agency chooses to delegate the authority to an IMT, Appendix A must be completed and given to the FSC.

All federal AD exception positions must be approved at the regional level by the Regional Incident Business Coordinator.

Field promotions occur when a casual employee is directed to work in a position at a higher rate than initially ordered. The casual must meet the qualifications of the position for which they are reassigned. Field promotions are documented on the Crew Time Report (CTR) or a General Message form (ICS 213) and include the effective date, position, and new AD rate. This is also to be documented in the Remarks section of the casual's OF-288.

Casuals who are reassigned from one incident to another do not need a new Single Resource Casual Hire Information form. The reassignment should be documented on the original form and the form sent with the casual to the new incident. Any notation on a Single Resource Casual Hire Information form is to be made without obliterating (i.e., "whiting out") the original information provided by the hiring official. Notations should include the initials of

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the person making the change. An example documenting the reassignment of a casual to a new incident with a change in position and pay rate is shown below:

POSITION INFORMATION				
Job title:	Division/Group Supervisor (DIVS)	AD class:	AD-J	AD rate: \$36.56
		Request #:	O-99	Fire code: ABCD
Incident order # (example: ID-BOF-000423):	KY-DBF-180001		Incident location (city/state) London, KY	
Hiring of emergency personnel may be made according to the provisions of the current <i>Administratively Determined Pay Plan for Emergency Workers</i> when any of the following conditions exist. Reference the Pay Plan for specific determinations.				
<input checked="" type="checkbox"/>	1. To fight an ongoing fire.	→	Reassigned to KY-CGP-180002 O-1.5 as AD-K SOF2	
<input type="checkbox"/>	2. Unusually dry period or fire danger is high to extreme.		@ \$40.16 effective 1/5/2018.	<i>tul</i>

Casuals hired by the Forest Service (FS) will have incidental travel paid in accordance with the current FS AD Pay Plan for Emergency Workers. Travel reimbursements may be paid on an OF-288 under the pay plan rates or through ETS2 under the Federal Travel Regulations, not both.

Processing casual salary payments:

- Hired by the FS: OF-288 and other required documentation should be submitted directly from the incident to the Albuquerque Service Center (ASC).
- Hired by the Department of Interior (DOI): OF-288 and other required documentation will be given to the employee upon demobilization for submission through their home unit. DOI policy allows some travel costs to be reimbursed on the OF-288 but this will be completed by the home unit and not at the incident.

See "Payment Direction" for additional information regarding AD payments on page 15.

Drivers Licensing Requirements

The Southern Area follows national direction for federal agencies regarding drivers licensing requirements. This document provides some key information drawn from agency requirements; however, it does not and is not intended to include entire agency policies.

All drivers, including casual hires, of government or state owned, rented, or leased vehicles, must meet the requirements of the hiring agency and know and observe all State and local traffic regulations. Agencies are expected to communicate requirements to their employees; employees are expected to meet or exceed those requirements. All agencies require a valid state driver's license and current defensive driving training as a minimum.

Drivers must have authorization to operate Forest Service owned or leased vehicles and equipment. This authorization is addressed via interagency agreements for other federal agency employees and cooperators; however, AD employees of the Forest Service must be issued an individual driver authorization annually for this purpose (see example in Appendix B).

AD employees that have completed defensive driving (required every 3 years) and any applicable equipment training/testing may be issued a letter of authorization in place of form OF-346 (U.S. Government Motor Vehicle Operator's Identification). The letter states what

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type of vehicle or equipment may be operated and any restricted driving conditions, requires the employee to have a valid state license in his or her possession, and is valid for

no more than one (1) year from authorization date. This letter or other approved document (such as the OF-346) must be carried whenever operating the vehicle or equipment.

Incident Driving

These standards address driving by personnel actively engaged in wildland fire or all-hazards response activities, including driving while assigned to a specific incident or during initial attack fire response (includes time required to control the fire and travel to a rest location). Agency resources assigned to an incident or engaged in initial attack fire response will adhere to the current agency work/rest policy for determining length of duty-day. Contractor employees are required to follow the same incident driving policies as government personnel as outlined in Chapter 10 of the SIIBM, specifically:

- a. No driver will drive more than 10 hours (behind the wheel/actual driving time) within any duty day (operational period).
- b. Multiple drivers in a single vehicle may drive up to the duty day limitation provided no driver exceeds the individual driving time (behind the wheel/actual driving time) time limitation of 10 hours.
- c. A driver shall drive only if they have had at least 8 consecutive hours off duty before beginning a shift. An exception to the minimum off duty hour requirement is allowed when **essential** to:
 - i. Accomplish **immediate** and **critical** suppression objectives, or
 - ii. Address **immediate** and **critical** firefighter or public safety issues.
- d. As stated in the current agency work/rest policy, documentation of mitigation measures used to reduce fatigue is required for drivers who exceed 16-hour work shifts. This is required regardless of whether the driver was still compliant with the 10 hour individual (behind the wheel) driving time limitations.

Lodging/Meals When On Incident

Many incidents in the SA utilize hotels/motels for lodging; however, resources may also be provided other sleeping arrangements, or may be expected to camp. National caterers are rarely used in the SA, so incidents may allow resources to provide their own meals and claim per diem, or may provide meals through local restaurants or other food providers. All resources assigned to an incident will follow incident agency requirements when staying at the incident base or other location. **Individuals are not automatically entitled to stay in a hotel/motel, eat meals at restaurants, or claim per diem.** Individuals who deviate from incident agency provided accommodations or meal arrangements will not be reimbursed for unauthorized expenses.

When lodging/meals are provided by the incident agency, the FSC/INBA will provide an

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approved tracking method (electronic spreadsheet, lodging/meal log with receipts, etc.) which will contain the resource order number, room number, resource name, etc. The Logistics Section Chief or Facilities Unit Leader will be responsible for documenting and tracking the provided lodging/meals on a daily basis.

Reasonable Accommodation Requests:

Follow direction in the SIIBM, Chapter 10.

Compensation for Injury/Illness

For specific guidance on Compensation for Injury/Illness, please refer to Chapter 10 of the SIIBM, Compensation for Injury/Illness, page 10-54.

Agency Provided Medical Care (APMC)

It is the incident agency's choice whether or not to offer APMC. In the SA, the Forest Service does not recommend use of APMC. The decision to not use APMC is in line with a national trend that addresses a suite of concerns with long-term injuries/illnesses, including the inability to show a record in the event a claim is needed should further treatment be necessary upon return to the home unit. Any use of the APMC will need the approval of the Regional Incident Business Coordinator.

If a DOI employee is injured, submit all paperwork to the employee's home unit as soon as possible.

If a State employee is injured, contact the employee's state or federal incident business management coordinator for guidance.

Contract personnel may not utilize APMC services.

Acquisition

Consideration must be given to cost efficiencies, specific needs and past performance when obtaining requested services and supplies. Upon arrival on the host unit, the FSC and BUYT will be given an Incident Service and Supply Plan. Forests in the Southern Area are expected to have such documents in place prior to the beginning of their fire season, and to review them annually. This allows for a successful assignment for individuals or BUYTs not familiar with businesses in the area.

Southern Area Geographic Area Agreements (VIPR)

In the chart below, you will see a summary of the type(s) of VIPR (I-BPAs) resources that are under a preseason agreement in the Southern Region. The VIPR resources listed are hosted by the national forest and dispatched through the interagency coordination center for select states.

VIPR resources will be dispatched in accordance with the dispatch priority list based on the need of the incident.

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Prior to being dispatched to an incident, including out of state assignments, the VIPR resource is to be inspected by the hosting unit. During Initial Attack the closest resource is still utilized but should be followed up by a VIPR resource as soon as possible if they meet the incident's needs.

- Incident Procurement, VIPR Preseason Agreement:
https://www.fs.fed.us/business/incident/vipragreements.php?tab=tab_d
- VIPR Dispatch Priority List (DPL):
https://www.fs.fed.us/business/incident/dispatch.php?tab=tab_d
- VIPR Finance Copies of Preseason Agreement:
https://www.fs.fed.us/business/incident/viprfinance.php?tab=tab_d

Refer to Appendix "C" for names/phone numbers of CO and COR.

VIPR Resource	Type	Host State(s)
Crew Bus Carrier	N/A	KY
Dozer	1	AR, FL, KY, NC
Dozer	2	AR, FL, GA, KY, NC, SC, TX, VA
Dozer	3	AR, FL, GA, KY, NC, TX
Engine	3	FL
Engine	4	FL
Engine	5	FL, TX, VA
Engine	6	AL, FL, GA, NC, VA
Excavator	1	FL, NC
Excavator	2	FL, GA, KY, NC
Excavator	3	AR, FL, GA, KY, NC
Excavator	4	FL, NC
Mulchers/Masticators (Boom Mounted)	1	AR
Mulchers/Masticators (Boom Mounted)	2	AR, FL
Mulchers/Masticators (Boom Mounted)	3	AR
Road Grader	1	AR, FL, KY, NC
Road Grader	2	FL
Skidder	1	KY, NC
Skidder	2	FL, KY
Strip Mulchers/Masticators	1	FL
Strip Mulchers/Masticators	2	FL, VA
Tractor Plow	2	FL, GA, NC, SC, VA
Tractor Plow	3	FL, GA, KY, NC
Transport	1	AL, FL, GA, KY, NC, SC, TX
Transport	2	AL, FL, GA, KY
Transport	3	AL, FL
Water Tender (Support)	1	AR, FL
Water Tender (Support)	2	FL, NC
Water Tender (Support)	3	FL

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National Contracts/Agreements

- Firefighter Crews Type 2-IA
- Crew Carrier Buses
- Airtankers
- Fire Retardant
- Helicopters – CWN
- Helicopters – Exclusive Use
- Mobile Food Services
- Mobile Shower Facilities
- VIPR Preseason Agreements

The documents and files for national contracts are available for download at this URL:
<http://fsweb.wo.fs.fed.us/aqm3/pages/nifc/index.php>

Regional Agreements/Contracts

Can be found at: <https://gacc.nifc.gov/sacc/logistics/equip/equipment.htm>

The FSC and BUYT will be given a copy of the incident agency's Service and Supply Plan.

Emergency Equipment Rental Agreements

EERAs are valid only for the duration of a specific incident and will terminate at the end of the incident. Volunteer fire department resources hired under an EERA are not considered Cooperator resources. EERAs require the same documentation and payment process as any other agreement.

The IMT will not sign up any non-dispatched equipment that shows up at fire camp (e.g. "fire chasers") without prior approval from the AA/INBA.

NOTE: Incident Only EERA and LUA Administrative Changes

An administrative change (FAR 43.101) is defined as a unilateral contract change, in writing, that does not affect the substantive rights of the parties (e.g. a change in the payment office, incident #, financial code, etc.). For the purpose of administration, an incident may include a resource utilized for complexes, mergers, splits, or lend lease for one unit, one IMT managing multiple incidents or multiple IMTs managing one incident/complex. In these circumstances, the resource may continue performance under the original EERA or LUA. In the event an incident is complexed, merged, and/or split, contracting officers may add language to allow active land use agreements from the original incident to be utilized on the subsequent incident as long as the payment center remains the same. A new resource order number may be assigned for the new incident. If the resource is needed on an incident outside the responsible area of the incident management team(s), a new EERA or LUA shall be written.

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Release of Contract Resources

Release of incident resources will be at the discretion of the IMT based on sound business practices with input from the local AA.

When demobilizing contracted tactical equipment, contractors awarded Incident Blanket Purchase Agreements (IBPAs) as a result of competitive solicitations shall be given priority to remain on the incident over tactical equipment with incident-only EERAs unless the Incident Commander (IC) determines it is necessary to deviate based on a specific incident need or objective. This applies to contracted tactical equipment only, and not all contracted resources (<https://www.nifc.gov/nicc/mobguide/Chapter%2040.pdf>). Deviations should be documented.

Administrative Office for Payment in e-ISuite

Please include a name and contact number when completing the Administrative Office for Payment section of e-ISuite. This should be the Point of Contact at the Payment Agency that can answer contractor questions regarding their payments. This is critical information for non-FS incidents. During the demob process, please ensure that contractors are aware of this information.

Incident Fuel Purchases

Depending on the agency and location, resources are encouraged to be self-sufficient and utilize local private fueling stations. If a fueling station is not in the vicinity, agency tanks may be used or a fuel vendor may be contracted. If agency tanks or a fuel vendor is used, they need to be closely monitored by Logistics and Finance for invoice additions and/or subtractions.

Recycling

Follow local agency policies for recycling water bottles and other recyclable materials at incidents. Additional guidance can be found in the SIIBM, Chapter 30, page 30-6, Recycling at Incident Base.

Land Use and Facility Agreements

If no agreement exists, the IMT will coordinate with the designated procurement official or agency representative to determine appropriate use and rates. General guidelines and factors to consider can be accessed at this URL:

<https://www.nwcg.gov/sites/default/files/publications/902-land-use-agreement-checklist.pdf>.

New agreements will be established by an authorized procurement official using the standard Emergency Facilities and Land Use Agreement Form (PMS 902-2), which is available at this URL:

<https://www.nwcg.gov/sites/default/files/publications/pms902-2.pdf>.

***See NOTE on page 11 under Emergency Equipment Rental Agreements.*

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Buying Team Procedures

Buying Teams will be ordered when determined by the host incident AA to support the local incident. The host incident agency is responsible for providing direction regarding procurement procedures and will provide a delegation of procurement authority.

The Buying Team Leader (BUYT-L) should visit and/or coordinate with the incident agency personnel to establish open lines of communication. The BUYT-L should establish a direct ordering system (if practical) between the supply unit and the BUYT to expedite procurement resource orders, coordinating with Dispatch so everyone understands the ordering process. On incidents where a direct ordering system is not practical, orders should be processed through expanded dispatch. Supplies available through the national cache system should be ordered through established channels.

If no Buying Team is assigned, the incident agency will provide purchasing support and direction to the IMT.

Local Purchasers or local BUYT

Local Purchasers or local BUYT (individuals who are not a part of a National or Regional BUYT) will report to the AA or local BUYT Lead. All purchases using government purchase card will adhere to the cardholder's Agency Incident Business policy and maintain proper records of purchases. Local purchasers or local BUYT will provide "Fill Information" to dispatch or district point of contact. Micro-purchase thresholds still apply on emergency incidents.

Prohibited, Restricted, and Specialty Items

Normal purchasing restrictions apply to emergency incident operations. All Department of Agriculture and DOI office supply purchases must be made through the GSA Office Supply Federal Strategic Sourcing Initiative (FSSI) BPAs or federal mandatory supply sources (i.e. USDA's Ability One Supply Store, Paperclips, etc.). When circumstances exist which necessitate the acquisition of unique or specialty items, incident agency procedures will be followed. Refer to **Appendix F** for a list of prohibited, restricted, and specialty items.

The purchasers will coordinate with the AA/INBA on all specialty (unusual or expensive) items or services.

Accountable and sensitive property purchased by the BUYT will be documented on an agency specific property transfer form (e.g. AD-107 or Incident Waybill) and a copy left in the fire finance package.

Supplemental Foods

The IMT and BUYT will follow the Supplemental Food Policy in the SIIBMH, Chapter 20, pages 20-10 and 20-11. All supplemental foods provided must be justified by the IC and have written approval by the AA before purchase is authorized. Supplemental foods are

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only to be approved in instances where personnel have expanded nutritional needs due to prolonged arduous work, and are not to be provided in settings such as Expanded Dispatch, Mobilization Centers, Area Command Offices, Fire Caches, Tanker Bases, Staging Areas, or other non-fire camp locations. Any exceptions to this standard policy must be justified by the IC or FMO, reviewed by the INBA, and approved by the AA.

As stated in the SIIBMH, bottled water is not a supplemental food and may be provided according to incident agency policy (e.g., where sufficient potable water is not available to accommodate the number of personnel on site).

Leasing vs. Purchasing of Equipment

RENTAL: As a general rule, rent or lease equipment rather than purchase equipment. Use the following strategies to manage costs:

- Rates should be established following standard commercial practices. Daily, weekly, or monthly rates should be utilized depending on the duration, type of equipment, etc. Payment will be at the rate (daily, weekly, monthly) that is most beneficial to the Government.
- It may be appropriate to include a provision for conversion to government ownership after a specified period of rental/lease. Consider the purchase factors below.
- It is recommended that items identified for lease be termed a “service” contract.

PURCHASE: When advantageous to the government, purchase rather than lease equipment. Consider and document all of the following factors:

- Total cost of purchase versus rental/lease
- Cost of handling, storage, and disposal
- Potential for use on future incidents
- Capability and availability of fire cache storage
- Maintenance and other service costs
- Technical approvals, if needed

Coordinate the rental/lease versus acquisition with the AA (through the INBA) and local fire cache manager.

Rental Vehicles

Rental vehicles for incident use within the Southern Area (SA) may be procured by individual travelers via agency travel programs (i.e., TCM or ETS2), by procurement officials via programs such as the [Rental Supplemental Vehicle Program \(RSVP\)](#), or via the National Emergency Rental Vehicle Agreement (NERV). Arrangements for NERV vehicles must be made through a Dispatch Office. Although NERV is intended to be an agreement for national use, its phase-in is incomplete, which may mean that SA resources traveling outside of the SA will not have the option to use it. Information regarding NERV availability and procedures for obtaining and managing NERV vehicles and associated documentation are posted at <https://sites.google.com/a/firenet.gov/nerv/home>.

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Vehicles procured using agency travel programs are to be covered by the [US Government Rental Car Agreement](#) (GRCA) which is most easily identified by the Government Administrative Rate Supplement (GARS) charge on the rental agreement. Failure to ensure that a rental is covered on the contract could result in the employee being held personally liable for damages. Using GRCA to obtain vehicles is appropriate when the vehicles can meet the needs of the incident while being operated within the scope of the contract. The most common reason to replace GRCA with RSVP or NERV vehicles is to allow operation off of professionally maintained roads (often called “off-road use”).

When obtaining rental vehicles, ensure that both the driver(s) and the rental company understand which method of procurement is being used. Regardless of the procurement method used, rental vehicles must be both authorized by the incident agency and documented on a Resource Order, and should be shared when possible. Southern Area Incident Management Teams (IMTs) will follow guidance in their [Operations Handbook](#).

Rental vehicles are to be tracked as accountable property:

- Vehicles assigned to IMTs, transportation units, dispatch centers, etc., will be tracked by the group to which the vehicles are assigned.
- Vehicles will be inspected prior to incident use. In the case of NERV vehicles, the “walk-around” inspection conducted when the vehicle is obtained at the vendor location is acceptable. When transferring vehicles between responsible parties (i.e., between teams, or from an individual to a team), interim inspections are recommended.
- The individual operating a vehicle is responsible to report any damage that may occur to his or her incident supervisor, who will ensure that the Finance Section and Safety Officer are notified. Damage to rental vehicles will be investigated and documented. Documentation will be provided to the Contracting Officer (CO) if the vehicle has been procured using RSVP or NERV, and shall be maintained in the Incident Finance Package (IFP) for transfer to the host agency as evidence of a potential contract claim.
- The IMT or other group to which vehicles are assigned will ensure vehicles are inspected and that any previously unreported damage is documented prior to the vehicle being returned to the rental company. The documentation will be provided to the CO (if applicable) and included in the IFP for transfer to the host agency.

Rental vehicle costs should not be accrued by the Cost Unit Leader (COST) in e-ISuite when the costs are being paid by credit card. These costs should be tracked using a manual method or spreadsheet similar to that used for other credit card expenditures (i.e., portable toilets). The method used must be clearly documented in the COST notes.

Cell Phones/Tablets/Laptops

Cell phones/tablets/laptops, if required by the position on the incident, should be provided by the incident agency. Government cell phones/tablets brought to an incident will not charge usage back to the incident. Reimbursement for use of non-government cell phones should be extremely rare and must be approved by the incident agency and documented on a resource order prior to use. A generic statement such as “cell phone authorized” on the resource order is not sufficient documentation to approve reimbursement. Each request

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for reimbursement requires specific approval from the incident agency. Dispatchers are generally not authorized to approve cell phone reimbursements.

Internet Services

The daily rate for optional internet on all existing VIPR IBPAs includes all equipment, personnel, data transmission, air time and any other costs associated with providing the optional internet and no further payment will be made for additional air time. If the services provided under the IBPA do not meet the needs of the incident, an incident only EERA will be written by a warranted CO and no payment will be made for the optional internet on the IBPA.

Payment Direction

Payment package documentation requirements may be different depending on the jurisdictional agency of the incident. It is critical that requirements are verified with the Incident Agency.

All payment documents generated by the incident (OF-286 and OF-288) will be supported with shift tickets or crew time reports documenting use and receipt of services/supplies. For resources paid by commercial invoice, the IMT must provide adequate documentation to support payments made, which may be by use of an initial and final shift ticket or other appropriate method. In all cases, supporting documentation must be included in the final finance package. Follow incident agency guidelines to determine which supporting documents are to be included in payment packages.

FS Payment Packages

Forest Service jurisdiction: All payment packages (casuals and contractors) should be submitted directly to the ASC from the incident.

Other jurisdiction: Payment packages for national contracts and FS-hired casuals should be submitted directly to ASC from the incident. EERA/IBPA payments are processed according to incident agency guidelines.

Preferred method – electronic submission to:

asc_ipc@fs.fed.us – for Casuals

asc_eera@fs.fed.us – for National Contracts, IBPAs and EERAs

OR (Do not do both)

Hardcopy mail to:

Albuquerque Service Center
Incident Finance
5141 Masthead NE
Albuquerque, NM 87109

To facilitate tracking of payments, the naming convention for each transmittal shall be

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the incident number, IMT Name, followed by a sequential numbering system.

Incident Number-IMT Name & Unique Number

Example: GA-CHF-00346-Dueitt 001

In those instances where an incident is large enough to require zones, coordination between the Finance Chiefs is required to determine a unique alpha identifier for each zone to be used as part of the sequential numbering system.

Example: GA-CHF-00211-Dueitt A001 (zone A of incident)

GA-CHF-00211-Dueitt B001 (zone B of incident)

FS payment information for casualties and contracts:

<https://www.fs.fed.us/managing-land/fire/ibp>

DOI Payment Packages – Regardless of incident jurisdiction, DOI-hired casualties must return to the home unit with payment documentation for processing. Agency-specific information regarding payment processes and documentation requirements for casualties and contracts can be found at the locations listed below:

BLM payment information for casualties and contracts:

<https://gacc.nifc.gov/gbcc/admin/IBCdocs/LINK1%20BLM%20Orange%20Book.pdf>

(Chapter 2 Casual Hires)

NPS payment information for casualties and contracts:

<https://www.nps.gov/subjects/fire/upload/nps-reference-manual-18.pdf>

(Chapter 16 Incident Business Management)

FWS payment information for casualties and contracts:

All payments for casualties will be routed through the home unit. Contracts are routed through the incident host unit.

Property Management

IMTs will emphasize good property management. The IMT will implement property checkout and return procedures to ensure proper accountability. Special consideration should be given to accountable and sensitive items.

Agency Property

All cache items will be returned to the cache in accordance with agency procedures. All procured non-cache property left with the agency at the close of the incident will be properly transferred on an agency specific property transfer form (e.g. AD-107). The IMT will work with the identified incident agency property management contact for disposition of all non-standard cache items.

All lost, damaged, or destroyed property shall be documented on the appropriate agency form (e.g. Fire Suppression Property Loss or Damage Report, OF-289), signed by the

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employee's incident supervisor, and processed in accordance with the incident agency and IMT procedures. A copy should be retained in the incident fire finance package.

For replacement with incident funds, the item must have been clearly damaged or destroyed while in use on the incident and use of the property must have been approved by the IMT and appropriate to the incident position. Specialized equipment brought from the home unit must be documented on a resource order. The incident agency is responsible for approving non-NFES and non-standard cache property repairs and/or replacements; however, approval authority may be delegated by the AA to the INBA, FSC, Logistics Section Chief (LSC), or other appropriate incident personnel.

All non-standard items with equivalent available through the cache (e.g., Kevlar pants and sleeping bags) will be replaced with cache items. Replacement for normal wear and tear is through home unit project funds. An S# will be issued for non-standard items for the amount equivalent to the cache item.

Agency Fleet – Repair and Maintenance

Each agency is responsible to maintain its fleet vehicles in safe operating condition. While assigned to an incident, repairs and/or maintenance to a vehicle may be necessary in order to maintain its safe operating condition. Repairs and maintenance that are required as a result of normal incident operations, often called "normal wear and tear", should not be charged to incident funds. In these cases, the incident personnel responsible for the vehicle should work through their home unit Fleet Manager or other designated official to obtain funding authorization/direction.

If damage occurs to a fleet vehicle while assigned to an incident, the damage must be documented and reported, following both home and host agency policies. The incident personnel responsible for the vehicle should work with the Finance Section and Safety Officer to ensure that the accident and/or property damage is investigated promptly and that host agency policy is followed, and also with their home unit Fleet Manager or other designated official to ensure that home agency policy is followed.

Property Issued to Contractors

Property and/or supply items assigned for use by contractors/vendors shall be returned to the incident, unless otherwise specified in the contract. Incident camps shall utilize an agency specific property transfer form (including the value of item) for each item to ensure all are returned. If all are not accounted for, the loss will be documented on the transfer form and an appropriate amount will be deducted from the contractor's invoice.

Contractors can be provided some consumable items (see current copy of contract) without charge.

Contractor equipment will not be replaced through the incident supply cache. Contractors must go through the contract claim process for replacement of lost or damaged items. An Incident Replacement Requisition, OF-315, is not to be issued to a contractor.

FEMA Accountable Property

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Follow the FEMA/Forest Service MOU and the national ESF4 standard operating business plan. Both documents will be given to the IMT at the in-briefing or can be found at this link: <https://www.fs.fed.us/managing-land/fire/ibp/all-hazard>

Cooperative Agreements

Master Agreement

The incident agency will provide the incoming IMT with a copy of its current Master Cooperative Wildland Fire Management and Stafford Act Response Agreement along with any current Local Operating Plans or Supplements. The IMT will follow procedures included in the agreement for suppression operations, use of cooperator resources, and finance documentation as applicable to the incident assignment.

USFS FMOs are responsible for ensuring the most recent copy of their unit Master Cooperative Wildland Fire Management and Stafford Act Response Agreement, along with the corresponding updated exhibits such as the Operating Plan, local supplements, and as applicable Cost Share agreements are sent to the Regional Cooperative Fire, All-Hazard and Prevention Program Manager of the Regional Office Fire & Aviation Management Staff. The Regional Coop Fire program manager will ensure the updated documents are posted to the Southern Area Coordination Center (SACC) website.

INBAs and finance specialists (i.e., representatives of ASC-Incident Finance) will be directed to this site when copies of the agreements are requested. Any issues with outdated agreements, should be directed to the attention of the Regional Incident Business Coordinator.

Agreements are posted on the SA Incident Business website under Cooperative Agreements: https://gacc.nifc.gov/sacc/forms_references.php

Cooperative Fire Protection Agreements

Fire District equipment and personnel should be signed up through a Cooperative Fire Protection Agreement. Fire District resources will provide a copy of their agreement to Finance at check-in. The IMT will enter all Fire District resources into e-ISuite to ensure costs are captured and invoices can be generated as appropriate. A fire cooperator check-in sheet has been created to provide Finance with the necessary information to determine the correct payment agency and method of payment. See Appendix J.

Law Enforcement

An incident agency local Law Enforcement Liaison will be identified to the IMT and will make contact with the team as needed during its assignment. Reference Appendix C.

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Sheriff's Office personnel used on the incident should be covered under the Cooperative Law Enforcement Agreements that are in place with each county and coordinated with agency law enforcement personnel.

Reimbursement to local law enforcement agencies should be limited to activities/services that are beyond the established responsibilities of the law enforcement agency. The Law Enforcement Liaison can assist IMTs in determining responsibilities. Incident security activities such as traffic control, camp security etc. may be handled by the law enforcement personnel assigned to the incident. Use unarmed security personnel when cost effective and appropriate to the security activities needed. Coordinate the decision to use contract security personnel with the incident Law Enforcement Liaison identified in Appendix C.

Claims

General guidance can be found in the SIIBM, Chapter 70 (<https://www.nwcg.gov/sites/default/files/publications/pms902.pdf>).

Contract Claims

The Procurement Unit Leader (PROC) with appropriate warrant authority is normally responsible for settling contract claims at the incident. If there is no PROC assigned, the original contracting officer or a designated successor may settle claims within their warrant authority and limits set by the incident agency. At the end of the incident, all actual and potential claims will be fully documented, submitted to, and reviewed with the responsible incident agency procurement official.

Tort/Non-Tort and Employee Claims

The Comp/Claims Unit Leader (COMP) will verify and implement the host agency's expectations for claims processing.

Resource Allocation

Resource Allocation Strategies have been developed to define guidance for the allocation of wildland fire resources in the SA when resource shortages or extraordinary situations exist. Appendix H describes the financial implementation for each strategy. The five strategies include:

- Lend/Lease – Agreement between IMTs to share assigned resources for a limited period of time.
- Pre-Position – Mobilization of resources to a defined location in advance of anticipated need.
- Resource Reallocation – During periods of resource scarcity, this strategy will transfer resources between ongoing or emerging incidents to meet the current needs.
- IMT Reserve – Resources identified (if currently on an incident) or assembled (if not

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currently on an incident) and mobilized to support emerging new large incidents. IMT reserve is mobilized at the same time as the IMT.

- Surge Task Force – Pre-identified suppression resources with overhead that can effectively and efficiently implement special mission operations in a short time period (one to four days)

It is critical when sharing resources that they are tracked appropriately in e-ISuite. This is especially critical when a Cost Share Agreement is involved.

Cost Share Agreements and Cost Accounting

Cost Share Agreements

Incident agencies are responsible for developing and signing cost share agreements. The IMT may be asked to assist and will need to verify that the agreement can be implemented and costs can be accurately tracked. Cost share agreements will follow the guidance found within the applicable cooperative agreement.

The incident agency, in coordination with the IMT, is encouraged to order additional personnel as necessary to implement a complex cost share agreement. Contact the FS Regional Incident Business Coordinator to obtain names of qualified personnel. Send a copy of the cost share agreement to the Incident Business Management Coordinators for all agencies involved. See Appendix I for Incident Business Management Coordinators contact information.

Cost Accounting

Cost Saving Measures Documented

The IMT is responsible to track and report costs as required by the incident agencies or as outlined in the cost share agreement. The Finance section should coordinate with Operations and Aviation to assure costs are tracked in e-ISuite or other Agency financial system in accordance with the cost share method utilized. Specific cost saving measures will be documented and provided to the AA.

Incident Support Cost

The suggested rate for incident support cost is \$160 per person per day for direct line personnel. This rate is negotiable and should be based on the complexity of the incident and associated support requirements. A complete list of those support costs included in the \$160 rate is posted on the Region 6 Incident Business website:

<http://www.fs.fed.us/r6/fire/incident-business/>. (In the near future, we will develop a similar document, for now use Region 6's list per this link).

e-ISuite Requirements

On incidents where a Type 1 or 2 Team is assigned, the e-ISuite program will be utilized. While not required, it is recommended that e-ISuite be utilized where a Type 3 team is assigned. Cost share incidents will require tracking of all cost sharing information in COST including completion of the "Paying Agency" field.

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Incident Accruals

While accruals are specific to the FS, almost all incidents will be required to generate and upload accruals. Any non-FS incident that uses resources that would be included in accruals such as IMETs, national contract crews, and FS-hired casuals should generate and transmit accruals. Pertinent information related to accruals and their transmission can be accessed via FS intranet at this URL:

<http://fswweb.asc.fs.fed.us/bfm/programs/financial-operations/incident-business/Accruals.php>

Uploading accruals may require coordination with the ITSS. The FAM-IT website provides information on generating and uploading the export file:

https://famit.nwcg.gov/sites/default/files/eISuite-FinancialExportQRC_20160727.pdf

To ensure accruals are recorded correctly, the COST should ensure that:

1. The **Agency** field is accurately entered based on the home agency:

Paid By	Agency
I-BPA, EERA, or other contract	PVT
State Government	Two letter state identifier
Local Government	CITY, CNTY or RUR
Federal Government Agency	BIA, BLM, NPS, FWS, FS
Aircraft under OAS Contract	OAS
Meteorological support from NWS	NOAA
Casuals	Hiring Agency

2. The Payment Agency field is the agency that makes the initial payment to the resource. Ensure that if the FS will be receiving a bill from the initial payment agency that the amount is reflected in the accruals.
3. Do not use FED in either the Agency or Payment Agency fields
4. Time is posted to within 24 hours of the completion of a shift
5. Accurate check in and release dates are entered in a timely manner
6. The state in which the incident is located is entered correctly on the incident information screen. This may require coordination with the ITSS.
7. For resources paid by the state, confirm that accurate rates are used

FEMA

FEMA Assignments

There may be one or more INBAs and/or COSTs assigned to assist the Regional ESF4 Coordinator, or at field units reporting to the Regional ESF Coordinator. If dispatched, they will work under the supervision of the Regional Incident Business Coordinator for the USFS-Southern Region (R8) located in Atlanta, GA, who will establish the necessary processes to effectively manage any ongoing FEMA all-hazard incidents. Guidance will come from documents found on the USFS Washington Office ESF4 website,

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<https://www.fs.fed.us/managing-land/fire/ibp/all-hazard>, and other local SOPs developed by the Regional Incident Business Coordinator. These will be provided upon arrival. The USFS ESF4 “all-hazard incident” website contains important documents for use by INBA/FSC/COST finance personnel, such as the NWCG’s ESF4 Guidelines document.

The Incident Business Practices website contains important documents to be used by INBAs and/or finance staff on all-hazard incidents. For example, the “2018 Supplement to Chapter 80 – Standard Cost Spreadsheet”, which provides information on calculating costs for the various resources to be ordered; and can be found at https://www.fs.fed.us/sites/default/files/media_wysiwyg/2018_ibp_standard_rates.xlsx,

The designated INBA at SACC will obtain instructions for creating accounting codes (F codes) that are unique to the Southern Area from the Regional Incident Business Coordinator. A MA (mission assignment) log is used, and should be updated daily. An “F” code is assigned to each MA authorizing use of appropriated funds for dispatching resources, making purchases, etc. This code is entered into the USFS financial system for activation by the ASC-Incident Finance staff, and it usually takes 24 hours before it can be used in Paycheck8, IAS, ETS2, etc. If requested late on Friday, it will take longer (by Tuesday). IMTs/others will be notified of the F code approved to support their mission.

IMTs need to check with the INBA assigned the incident, or in SACC/Atlanta, to ensure they know which e-ISuite report to submit. Normally, “Daily Cost Summary Reports” are due (via e-ISuite for those with that capability, or via an R8-developed Cost Spreadsheet that is provided by the Regional Incident Business Coordinator to teams without e-ISuite capabilities). Send daily reports and/or spreadsheets to ASC-Incident Finance, and copies of all these reports also go to the Regional Incident Business Coordinator for the USFS located in Atlanta, GA.

The finance team at SACC is responsible to consolidate the daily cost information reported via “spreadsheets”, as well as via e-ISuite, and come up with the total daily cost for each MA. This information is given to the Southern Area ESF4 lead, the INBA,

Washington Office ESF coordinator, and others in the NRCC (national desk) and RRCC (regional desk). This is necessary to keep track of the balance of each MA, and when expenses reach 75% of dollars approved, will notify the ESF leader so, if needed, the ESF leader can negotiate with FEMA to get additional dollars to support the mission. It takes at least 2-3 days for the requests for additional funding to be approved. This is a key function of the INBA/Finance Team at SACC. The finance team at SACC reports on costs for each incident to the ESF Coordinator, ESF leader at the RRCC, and copies the NRCC as well.

The Regional Incident Business Coordinator or her designee, and her finance lead will attend daily conference calls hosted by the Atlanta/SACC ESF4 Coordinator. In addition, will set up daily conference calls with IMT/FSCs and Buying Teams assigned to the FEMA all-hazard incidents, to ensure they have access to SOPs and policy to allow them to be successful on their incident assignments, that purchases are necessary for the specific mission as stated in the MA’s “statement of work” and that such purchases will be approved/reimbursed by FEMA. Also, to ensure consistency and accountability.

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The designated INBA will create a directory, with primary points of contacts' email addresses, cell phone numbers, and alternates. This will facilitate communication among SACC and field dispatched finance teams and Buying Teams. IMTs and Buying Teams are encouraged to participate on such calls, and bring their issues for discussion/resolution. To the extent possible, a regional CO will be on the calls as well.

General messages requesting "S" and "E" orders/numbers need to be submitted in advance of any purchase, and ideally this will be coordinated through the ESF liaison assigned to the IMT, or via the designated SACC INBA.

Teams assigned to the state of TX will need to be aware of that state's "STAR" process for purchasing. A simplistic way of explaining it is: STAR is the process for ordering anything other than a supply (consumable office supplies), hotels or meals. Buying Teams or others approved to order under an approved FEMA mission assignment/incidents must follow these instructions:

- Before ordering, a general message is required, listing the items needed (i.e., ambulance, medic, buses, porta-potties, etc.), along with a justification for the need, and how the item(s) help meet the mission as stated on the "statement of work" on the MA document from FEMA. For instance, you need a specialized printer/plotter as complex maps are needed to do work deemed necessary for the mission; and it is not available by the hosting unit or adjacent units, or partner agencies for loaning.
- Once the general message is issued, take it to the Texas Forest Service (state) ESF liaison, who will take it to the TX State Operations Center (SOC), the entity with the authority to approve or deny the request.
- If approved by the SOC, a STAR number will be assigned and the state of TX will order and pay the resource and notify the team that it has been ordered and when it will arrive.
- The team **only manages** the resource. Once it is issued a STAR number it becomes a State resource.

Here is an explanation from the IBA in the state of TX (Texas Forest Service): There are multiple reasons for this process. Texas is agreeing to cover the cost that is associated with the item regardless of being reimbursed by FEMA. The state must operate as normal and cannot do things differently just because it's a reimbursable event. If FEMA came down and denied reimbursing certain things that the teams purchased, Texas is still responsible for paying. It's also a way to track and be accountable for items that the teams order up. If the State has no knowledge of 2 buses (\$1,500/day) and then all of a sudden see a bill for over \$10,000, that's something that was not accounted for in the budget. Think of Texas like a Forest, we only get so much money a year to work with. If we spend it all and have to ask for more, they are going to want to know where it all went and why. Another reason for the STAR is that it's the state's way of ordering. Texas has contracts already in place with vendors. Notably is United Rentals that covers a wide range of commodities that are needed during disasters.

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Incident Computer System

Prior to and during transitions between teams, ensure that the teams communicate and coordinate ordering necessary replacements for computers, printers, or other peripherals that will not be available to the incoming team. This effort will prevent duplication and ensure that the incoming team will have full functionality at transfer of command.

Closeout

e-ISuite Close-Out Requirements

A copy of the database should be made for the host unit and included in the final incident package (ref. NWCG memorandum 7/19/2004). The database Admin username and password must be included.

e-ISuite Data Repository – Applies to IMT Transitions & Closeout

Coordination with the ITSS will be necessary. Instructions on uploading the database can be found at:

https://famit.nwcg.gov/sites/default/files/NWCG-Data_Repository_for_eISuite_2017_03_01.pdf

Finance Package Requirements

Follow the National Wildfire Coordinating Group financial package requirements which can be found at:

<https://www.nwcg.gov/sites/default/files/committee/docs/ipsc-imt-instructions.pdf>

At the end of the incident, the final incident package will be transferred to the host unit/agency. The host agency will provide a financial performance rating 60-120 days following the incident to the IC.

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**Appendix A
DELEGATION OF AD HIRING AUTHORITY**

File Code:

Date:

Route To:

Subject: Delegation of AD Hiring Authority

To: Incident Commander

I am delegating the authority to hire casual employees to the Incident Management Team, specifically to the Finance Section Chief, Time Unit Leader, and/or Procurement Unit Leader.

All hiring of casual employees will be in accordance with the NWCG Standards for Interagency Incident Business Management and its SACG supplements. The parties agree that persons hired under this provision must be trained, certified, and "red carded" by the appropriate state official to meet national qualification standards set forth by the National Wildfire Coordinating Group Wildland Fire Qualification System Guide (Publication Management System PMS-310-1).

Responsibilities of the hiring official are:

- Ensure the proper paperwork is obtained and filled out completely
- Validate that the person is qualified for the position
- Provide the casual employee with all the information related to direct deposit, tax withholdings and health insurance
- Be knowledgeable of the SIIBMH as it relates to the AD Pay Plan and the incident agency's AD pay plan and their use

For positions not listed in the Incident Position Matrix of the AD Pay Plan, the Hiring Official must submit a position description to the Regional/State level (regional incident business coordinator) for approval to establish an Excepted Position.

The agency contact for questions related to AD hiring is _____.

/s/ _____
Agency Administrator

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**Appendix B
AUTHORIZATION TO OPERATE FOREST
SERVICE VEHICLES**

File code: 7130/5100

Date:

Subject: Authorization to Operate Forest Service Vehicles

To: (Name of AD employee)

In accordance with the FSH 7109.19, WO Amendment 7109.19-2018-1, this authorization is issued in lieu of an OF-346 to allow you to operate Forest Service-owned, -rented, or -leased vehicles and/or equipment. This authorization applies only to the conduct of official business, and is valid only when you are under hire as an Administratively Determined employee of the Forest Service.

You are authorized to operate the following:

List vehicle(s) and/or equipment type(s)
(Include capacity or other descriptor(s) as applicable)

- 1.
- 2.
- 3.

Restrictions: (Examples: None beyond state-issued license, paved roads only, and automatic transmissions only)

Date of expiration of this authorization: (Cannot exceed 1 year)

This letter, along with your valid State Driver's License, must be in your possession when operating any authorized type of government-owned, -rented, or -leased vehicle or equipment in order to be in effect.

Signature

Printed name and title of Issuing Official

cc: Hiring Unit Driver Operator Examiner and Dispatch

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**Appendix C
INCIDENT BUSINESS AND AGENCY CONTACTS**

Authority/responsibility for Incident Business Administration practices is delegated to the following agency personnel: (If none are assigned to the Incident, leave block blank.)

Title	Name	Office Phone	Cellular Phone
Incident Business Advisor			
Agency Administrative Representative			
Regional VIPR Contracting Officer (USFS, SA/R-8)	Shundrica Daniels USFS, R8-Atlanta Southern Area	404-347-2348	404-274-9746
Regional VIPR Contracting Officer Representative (USFS, SA/R-8)	Terry Eller USFS, R8-NC Southern Area	828-479-6431	828-779-2081
Regional Incident Business Coordinator (USFS, SA/R-8)	Maria Laboy USFS, R8-Atlanta Southern Area	404-347-3042	404-309-5286

Local Agency Contacts

Title	Name	Office Phone	Cellular Phone
Human Resources			
AD Hiring Contact			
Financial Management			
Acquisition/Contracting & Contract Claims			
Information Resources (Computers)			
Telecommunications (Voice/Data Lines, Radios)			
Agreements			
Compensation/OWCP (HIPPA)			
Claims (Non-contract)			
Law Enforcement			
Fleet			
Safety			
Property Management			
HR-OWCP ASC			
http://fsweb.wo.fs.fed.us/hrm/			

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Appendix D INCIDENT BUSINESS ADVISOR DELEGATION OF AUTHORITY

Date:

Route To:

Subject: Delegation of Authority, Incident Business Advisor

To: Incident Business Advisor

This letter authorizes _____ to act as an Incident Business Advisor (INBA) for the _____. The INBA works as a liaison and advisor between the _____ and the Incident Management Team (IMT) for all issues related to incident business management.

Specific responsibilities include:

- Maintains close communication with the Incident Commander, Finance Section Chief, and other members of the IMT, Area Command Team, and other administrative sections within the incident agency.
- Coordinates with Finance Section Chief for a daily flow of information. This includes a report of current progress of incident business administration operations and copies of the current cost projections and obligations.
- Attends incident planning meetings. Represents the agency and assists the IMT in strategic planning, transitions, or significant changes in status.
- Provides guidance to the Agency Administrator for the need to assign a Liaison to ensure all payment packages are complete prior to transmittal to a Payment Center.
- Represents the agency in cost management activities and works with the Team to ensure cost control measures and other fiscal controls are in place. Specifically, the INBA monitors, tracks, and documents their involvement in cost containment items such as WFDSS, Cost Share Agreements, and daily costs/obligations COST reports. Special emphasis will be placed on reviewing large cost centers.
- Reviews questionable orders as requested by the Buying Team or Expanded Dispatch, and holds until clarification is made with the IMT. Questionable items, which cannot be resolved between the IMT and the INBA, will be discussed with the Agency Administrator for resolution.
- Provides advice to the agency and the IMT concerning local, regional, and national incident business management policies. The INBA provides

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communication links, guidance, and advice to facilitate efficiency in business management practices.

- Reviews incident business administration practices to ensure compliance with approved practices and obtains necessary information or interpretations of laws, regulations, and agreements as needed to efficiently and effectively accomplish administrative practices.
- Specifically monitors business administration activities at Expanded Dispatch, Buying Teams, ICP, or any other sites that may support the incident. The INBA has full access to any and all administrative functions of the incident and is expected to make frequent site visits to all support locations.
- Verifies the IMT has an established process to ensure that property is tracked, recovered, and/or disposed of properly on the incident
- Advises the Incident Commander, Agency Administrator, and/or interagency coordinating groups such as MAC and Area Command Teams of the need for special support units such as Buying Teams, Payment Teams, Claims Teams, or other support as needed.
- Participates in the IMT initial briefing and closeout meeting and provides a critique of team incident business activities to both the Agency Administrator and the Team.
- Represents the agency in other related activities as needed and identified by the Agency Administrator or as requested by the Incident Commander or Area Commander.
- May serve in the same role as identified above in Burned Area Emergency Response (BAER) and post fire activities.
- Provides briefings to the Agency Administrator, MAC, Area Command, and Administrative Representative, as needed.
- Provides a final written narrative that includes the following:
 - Procedures and processes that worked well
 - Areas that need improvement and recommendations
 - Documentation of decisions, policy established or changed
 - Incident Agency follow-up needed

The Agency Administrator is the primary point of contact, but coordination will be maintained with _____.

/s/ _____
Agency Administrator

cc: Unit Managers
Incident Management Team

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Appendix E DRIVER LICENSING REQUIREMENTS

Any employee, including ADs, who need to drive an Agency or State owned or leased vehicle must be authorized to do so. The following clarifies policy for the use and operation of government vehicles by our interagency partners and AD employees. Personal vehicles reimbursed under the Federal Travel Regulations are exempt from the requirement.

Clarification of the licensing requirements for interagency partners

The established licensing direction in the current Master Cooperative Fire Protection Agreement shall be followed. The agreement states:

Drivers and equipment operators will hold appropriate operating licenses to meet state and federal laws. Employees of the Parties to this Agreement may operate each other's vehicles provided that operator meets the current operating guidelines and training requirements of their own Party.

Clarification of the AD employee requirements for driving/operator certification

Not all ADs will require driver's authorization. Only those specifically hired as drivers or those ADs expected to drive rental cars or agency vehicles should be authorized. Related manual direction may be referenced in FSM 7130, FSH 6709.11 (Safety and Health Handbook) and FSH 7109.19. BIA, FWS and NPS regulations can be found in Chapter 7 of the Red Book.

For AD hires that are dispatched frequently and have the need to use FS or BLM owned or leased vehicles up to 9,999 GVWR, certification should occur at the home unit. They must adhere to the following:

- Possess a valid state driver's license for the type of vehicle to be driven. The state license must be carried with the employee any time they are driving a government vehicle.
- Attend a Defensive Driving course with a refresher every three years.

FWS regulations

All AD drivers must complete the FWS Driver Authorization Form (3-2267). For FWS policy see FWS Service manual 321 FW1. <http://www.fws.gov/policy/manuals/>.

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Appendix F PROHIBITED, RESTRICTED, AND SPECIALTY ITEMS

The following items are either restricted from purchasing or limited in some manner.

Prohibited Items

- Alcoholic beverages
- Clothing, buttons, stickers, hats, etc., with special/specific printing, coloring, or logos
- Plants & flowers
- Fees for the use of recreational facilities (i.e. hot springs)
- Massage or other therapist services
- Concessionaire payments for use of Federal lands
- Vitamins and mineral supplements

Restricted Items

- Special clothing (swimsuits, caulk boots, etc.)
- Pillows or sleeping bags (other than regular GSA, fire cache type)
- WCF and GSA vehicle modifications/repairs will be coordinated through the local fleet manager
- Agency policy will be followed for approval on purchase of all telecommunications equipment

Specialty Items/Services

The AA has the authority to establish additional purchasing restrictions or limitations on specialty items. This authority may be delegated to the FSC or INBA in writing.

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Appendix G RESOURCE ALLOCATION

Financial Implementation

Lend/Lease

Temporary loan of resources from one incident to another. This can include those resources hired under an Incident Only EERA. If the resource is needed on an incident **outside** the responsible area of the incident management team(s), a new EERA or LUA shall be written.

Definition

An agreement between IMTs to allow for the use of assigned resources **from one incident to another incident** for a short-term mission (**generally not to exceed one to three operational periods; validated each day by Operations**).

Description

The lend/lease of resources fill a critical short term operational need between large incidents. This allows Incident Commanders (ICs) to share resources, to increase efficiencies, and to simplify the process. The process defined below is not intended for use on small incidents or IA where e-ISuite is not utilized.

Implementation Procedures

- ROSS - Resources are **not reassigned** in ROSS. Resource remains assigned to the initial incident. (No resource order will be generated so no new resource number). Incident Dispatch/Expanded Dispatch is not required to make any edits on the initial resource order to track lend/lease resources.
 - If an incident is within 2 – 3 days of demobilizing; resources from that incident should be reassigned and not use the lend/lease strategy.
- Inspections - Lend/lease contract resources previously inspected by sending incident should **not** be **re-inspected** by receiving incident.
- e-ISuite – Resource will **not** be moved in e-ISuite:
 - **Sending Incident** will continue to post time in their database. A new incident will be added to the database so that costs are accurately captured for both incidents. In the remarks block of the OF-288 or OF-286, note that the resource was lend/lease. This will serve as the documentation for use of multiple incident codes on the invoice.

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- **Receiving Incident** will add an e-ISuite COST entry: “Resource on loan from XX Incident”. If there is a need to have individual lend/lease resources listed in the database so they can be assigned on the IAP the COST has the option to enter each resource separately
- Capturing Costs - FSCs will coordinate to ensure costs are included in the receiving incident data base as a line item, **not actual posted time**. The estimated system rates can be used if actuals are not available.
- Length of assignment - will not be affected by lend/lease – all days count toward the original assignment length
- Demob – The sending incident is responsible to collect all documentation and process the final invoice to demob the resource.
- Hard Copy Documents - all original documents (shift tickets, CTRs, etc.) will be sent to sending incident.
 - **Lend/Lease File** – Both the send and receiving incidents will set up a file for the lend/lease resources. At a minimum it should contain the following:
 - A list of the resources (*Resource Order#; vendor name; dates of use; etc.*)
 - Aircraft Use Summary sheets (*if used*)
 - Copy of the OF-286/OF-288 (*optional; this would be provided to the receiving incident at the end of the lend/lease period. Although it would be very beneficial for documentation purposes it may not always be possible to accomplish.*)
- Aviation – The Aircraft summary reports will document all lend/lease activities and will include a cost breakdown by incident code. A copy of these summary reports can be provided to the State to support any bills associated with the lend/lease resource. COST should make a duplicate copy of any lend/lease summary reports and keep them in a separate file in the COST documentation section of the final fire package.
- Communication between IMTs is key!
 - The IC makes the final decision on whether or not to participate in a lend/lease strategy. It is their responsibility to ensure that the information is shared with their Command and General staff.
 - FSCs must coordinate with each other and with their team to ensure costs are accurately captured; time is posted and all documentation is provided to the sending incident.

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- Operations need to ensure that Finance is informed when the lend/lease ends so that all the documentation can be forwarded to the sending incident in a timely manner.

Examples

FS incident loans 3 crews to State incident

Application	FS incident (sending)	State incident (receiving)
ROSS	Crews stay assigned to FS incident	
e-ISuite - DATA ADMIN	Add State Incident to database	
e-ISuite – RESOURCES		If resources check in, do not add resource to database Resources are added to the database by Finance (COST) see instructions below
e-ISuite – TIME	Post time to State incident added to database upon crews return. In remarks of OF-286 or OF-288 note that this is a Lend/lease resource	Do not post any time and have crews take back CTRs or Shift tickets to FS incident
e-ISuite – COST		Coordinate with FSC/COST of FS Incident Option 1: Add a single line item “Resource loan from XX Incident” Enter a total daily cost for all the resources which can be obtained from the FS incident Option 2: Add a line for each resource. Example for name could be ABC dozer and “Resource loan from XX Incident” should be added in remarks. Enter daily cost for each resource which can be obtained from the FS incident
Injuries	Assist as needed to make sure documentation is forwarded and completed	Fill out appropriate forms to capture event, ask FS incident for assistance for federal resources, if needed

NOTE: When the lending incident enters the accounting code for the receiving incident into e-ISuite, the system will generate two OF-286 invoices and another column of time on the OF-288. The lending incident will submit **ALL** pay documents through their payment system. The lending incident is responsible for any payments made to the vendors. If necessary, the lending incident agency will submit a bill to the receiving incident agency through standard billing processes.

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FS incident loans 2 Helicopters to State incident

Application	FS incident (sending)	State incident (receiving)
ROSS	Aircraft stay assigned to FS incident	
e-ISuite – COST	<p><i>Coordinate with FSC/COST of State Incident</i></p> <p>Aircraft summary reports will identify the resource as lend/lease and include a breakdown of the costs by incident Provide State incident with a copy of the Daily Summaries of Aircraft flown on State Incident</p> <p>To facilitate documentation, make a copy of all Aircraft summary reports for lend/lease resources and file them separately in the COST documentation box.</p>	<p><i>Coordinate with FSC/COST of FS Incident</i></p> <p>Add aircraft to database</p> <p>Enter cost information from the Daily Summaries provided by the FS Incident</p>

These examples would also apply if resources were loaned from:

- State Incident to Federal Incident
- State Incident to State Incident
- Federal Incident to Federal Incident

The only criteria is that e-ISuite must be used by both incidents.

Pre-Position

Mobilization of resources to a defined location in advance of anticipated need.

- Pre-positioned resources are considered to be “staged” and compensated when the criteria of the SIIBM is met. This means being held at a specific location and not at their home.
- An agency representative must be available to certify and sign for time worked.
- Cost for pre-positioned resources will be borne by the benefitting agencies according to SACG agreement as part of the SA Annual Operating Plan.

Resource Reallocation

During periods of resource scarcity, this strategy will transfer resources between ongoing or emerging incidents to meet the current need

- Resources will be issued new Resource Order numbers in ROSS. Their records should be closed out in e-ISuite by the sending incident and re-entered into e-ISuite at the receiving incident with their new numbers.

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- The receiving incident pays reallocated resource travel to that incident. The sending incident pays for any mandatory days off taken before the new assignment starts.

IMT Reserve

Resources identified (if currently on an incident) or assembled (if not currently on an incident) and mobilized to support emerging new large incidents. IMT reserve is mobilized at the same time as the IMT.

- Resources should have at least six days remaining before they “time out”.
- Resources currently assigned to an incident will continue to charge to that fire code until reassigned to an emerging incident.
- Resources will be assigned to their new assignment in ROSS and travel will be paid by the receiving incident.
- Once assigned, the IMT Reserve resources are entered in e-ISuite and will remain on that incident until released.
- This will not be considered a “new assignment” for determining length of assignment. All days in staging or travel between incidents will count as days worked.

Surge Task Force

Surge Task Forces are pre-identified suppression resources with overhead that can effectively and efficiently implement special mission operations in a short time period (one to four days).

- If implemented 2018, specific guidance will be provided to the IMT. Contact the FS Regional Incident Business Coordinator for details if a Surge Task Force is assigned to the incident.

Appendix H
LOCAL UNIT REQUIREMENTS

Considerations for local supplements:

- Final incident packages
- Issuance of block of S-numbers
- Issuance of block of EERA numbers
- Determination of approval levels for specialty items
- Local recycling requirements

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Appendix I Incident Business Management Coordinators

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**Appendix J
Fire Cooperator Check In Sheet**

(Rural, County, City)

Incident Name: RO Number: Jurisdictional Agency:

Cooperator/Agreement Information

*Cooperator Name:
 *Specific Firehouse/District:
 *Agreement Number:
 *Copy of Agreement Included? YES NO
 *DUNS:
 Replacing a Resource? YES NO
 If Yes, which Resource?

Payment Information

*Equipment: *Equipment Rate:
 *Personnel: *Personnel Rate:
 *Meal Breaks Authorized? YES NO *Rate Guide Applicable? YES NO
 *Location of Rate Guide:
 Payment Agency for OF-286: *Host Agency:
 Billing Agency: Which agencies involved? Identify Payment Flow
 *Cooperator need originals?: YES NO
 *What originals does Cooperator need?

N/A OF-288 OF-286 Shift Tickets CTR's

Host Unit Contact Information

*Full Name:
 *Primary Phone: *Alternate Phone:
 *Email:
 *Website:
 *Forest Service G&A Contact/Office:

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Appendix K Buying Team Delegation of Authority Template

File Code:
Route To:

Date:

Subject: Delegation of Authority – Buying Team

To: _____, Buying Team Leader

You are hereby delegated authority to procure for the _____ incident(s), on behalf of the _____ until released from this incident, and/or all procurements are reconciled.

All purchases are expected to be done within federal acquisition regulations; the NWCG Standards for Interagency Incident Business Management (IIBM) and supplemental; the National Interagency Buying Team Guide; and the Pacific Northwest Geographic Area, and local unit Incident Business Operating Guidelines.

The following are the Agency Administrators expectations of your team;

- Maintain a positive work attitude.
- Ensure your unit is working safely and maintains work rest guidelines and driving standards.
- Coordinate with the Incident Business Advisor (INBA) and Incident Management Team (IMT) on orders received when necessary.
- Provide daily cost to the IMT.
- All purchases must have a valid resource order
- Decision on whether to rent or purchase property should be made on a case-by-case basis through evaluation of comparative costs and other factors.
- Maintain communications with the IMT, Expanded Dispatch, INBA, and transportation.
- Coordinate with transportation to establish a schedule for delivery of items to the incident.
- Identify issues that need resolved and provide recommendations to correct the issue.
- Questionable orders should be discussed with the INBA (in the absence of an INBA the Agency Administrator (AA) or Fire Management Officer (FMO)).
- Provide transition report including what items are still left open for payment and copies of all purchases to the local unit made to include supplies, materials, equipment, property, and all agreements.

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By the end of your first shift, you will need to provide the INBA and Dispatch (both local unit and expanded) with your team operating plan, including work hours and team contact information. Upon completion of your work assignment, you are to meet with current INBA and designated forest representative to discuss what was accomplished and to report total dollars expended by the team. An electronic log of expenditures will be provided to the agency. This log should include: fire code, vendor name, dates of work period, total expended, and transaction number.

/s/ _____
Agency Administrator

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Appendix L
Buying Team Performance Evaluation Template

NATIONAL BUYING TEAM PERFORMANCE EVALUATION

Instruction: The Line Officer or Designated Agency Representative completes the performance evaluation prior to release of the Buying Team. The Buying Team Leader shall forward a copy of the performance evaluation to the incident agency incident business representative.

Incident Name: _____ Date: _____

Incident Agency: _____

Evaluators Name & Position: _____

Evaluators Phone Number: _____

1) Was the Leader an effective manager of the Buying Team and its activities?
Above Satisfactory Satisfactory Below Satisfactory

2) Was it obvious that the Leader was in charge?
Above Satisfactory Satisfactory Below Satisfactory

3) Did the Buying Team adhere to the Incident Business Management Handbook rules and policy?
Above Satisfactory Satisfactory Below Satisfactory

4) Did the Buying Team evaluate the availability of goods and services, prices, and delivery costs, and did the team select the source best meeting incident needs?
Above Satisfactory Satisfactory Below Satisfactory

5) Did the Buying make sound cost management decisions and provide documentation to support their decisions?
Above Satisfactory Satisfactory Below Satisfactory

6) Was the Buying Team prompt in supplying goods and services for the incident?
Above Satisfactory Satisfactory Below Satisfactory

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7) Was the Buying Team sensitive to local community issues, local businesses, local contractors, and local land owners?

Above Satisfactory *Satisfactory* *Below Satisfactory*

8) Was the Buying Team effecting in negotiating and issuing EERA's and Emergency Facilities and Land Use Agreements?

Above Satisfactory *Satisfactory* *Below Satisfactory*

9) How well did the Buying Team manage accountable property?

Above Satisfactory *Satisfactory* *Below Satisfactory*

10) How was the Buying Team's performance in settling claims (if applicable)

Above Satisfactory *Satisfactory* *Below Satisfactory* *Not applicable*

11) How was Buying Team's ability to anticipate and respond to changing conditions, such as additional incidents and/or workloads?

Above Satisfactory *Satisfactory* *Below Satisfactory*

12) How was the Buying Team's coordination and cooperation with the incident agency?

Above Satisfactory *Satisfactory* *Below Satisfactory*

13) How was the Buying Team's coordination and cooperation with expanded dispatch?

Above Satisfactory *Satisfactory* *Below Satisfactory*

14) How was the Buying Team's coordination and cooperation with the IMT?

Above Satisfactory *Satisfactory* *Below Satisfactory*

15) How was the Buying Team's coordination and cooperation with the Agency Rep. or IBA?

Above Satisfactory *Satisfactory* *Below Satisfactory*

16) Was the Buying Team's documentation package complete and submitted appropriately?

Above Satisfactory *Satisfactory* *Below Satisfactory*

17) Did the Buying Team present a positive attitude and work in a professional manner?

Above Satisfactory *Satisfactory* *Below Satisfactory*

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This evaluation has been discussed by and between the following Line Officer or Designated Agency Representative and the Buying Team Leader.

Agency Representative Signature: _____

Date: _____

Buying Team Leader Signature: _____

Date: _____

For any Below Satisfactory rating, please include an explanation.