

# Documentation Unit Leader J-342



Job Aid  
November 2008  
NFES 2543



## CERTIFICATION STATEMENT

on behalf of the

### NATIONAL WILDFIRE COORDINATING GROUP

*The following training material attains the standards prescribed for courses developed under the interagency curriculum established and coordinated by the National Wildfire Coordinating Group. The instruction is certified for interagency use and is known as:*

Documentation Unit Leader, J-342  
Certified at Level I

This product is part of an established NWCWG curriculum. It meets the COURSE DEVELOPMENT AND FORMAT STANDARDS – Sixth Edition, 2003 and has received a technical review and a professional edit.

  
Member NWCWG and Training Working Team Liaison

Date 11-14-2008

  
Chairperson, Training Working Team

Date 11/14/2008

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E-mail: [nwgc\\_standards@nifc.blm.gov](mailto:nwgc_standards@nifc.blm.gov).

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## **NWCG TRAINING WORKING TEAM POSITION ON COURSE PRESENTATION AND MATERIALS**

The recommended hours listed in the FMCG are developed by Subject Matter Experts based on their estimation of the time required to present all material needed to adequately teach the unit and course objectives. The hours listed may vary slightly due to factors such as number of students, types and complexity of course activities, and the addition of local materials. NWCG is aware that there have been courses presented in an abbreviated form, varying greatly from the recommended course hours. Instructors and students are cautioned that in order to be recognized as an NWCG certified course, certain guidelines must be followed:

- Lead instructors are encouraged to enhance course materials to reflect the conditions, resources and policies of the local unit and area as long as the objectives of the course and each unit are not compromised.
- Exercises can be modified to reflect local fuel types, resources and conditions where the student will be likely to fill incident assignments. The objectives and intent of the exercises must remain intact.
- Test questions may be added that reflect any local information that may have been added to the course. However, test questions in the certified course materials should not be deleted to ensure the accurate testing of course and unit objectives.
- Test grades, to determine successful completion of the course, shall be based only on the questions in the certified course materials.

If lead instructors feel that any course materials are inaccurate, that information should be submitted by e-mail to NWCG Fire Training at [nwcg\\_standards@nifc.blm.gov](mailto:nwcg_standards@nifc.blm.gov). Materials submitted will be evaluated and, where and when appropriate, incorporated into the appropriate courses.

### **COURSE LENGTH FOR NWCG COURSES**

If a course is available through PMS, the recommended course hours and the “NWCG Position on Course Presentation and Materials” will be adhered to by the course instructors.

- Unit times represent the allotted time to teach the unit and complete the exercises, simulations, and tests.
- Recommended course hours are given to help the students and the course coordinator with planning travel, room reservations, and facilities usage. This represents the time estimated to present the NWCG provided materials including time for breaks, lunch periods, set-up for field exercises or simulations, etc.
- Actual times for both the unit and the course may vary based on number of students, types and complexity of course activities, and the addition of local instructional materials.

If the course is not available through PMS, e.g., L-380, and has been developed using NWCG course criteria, minimum course hour requirements have been established and must be adhered to by the course developer and course instructors.

Course hours for all NWCG courses can be found in the Field Manager’s Course Guide (<http://www.nwcg.gov/pms/training/fmcp.pdf>). If the hours are a minimum versus recommended they will be stated as such.

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## J-342 – DOCUMENTATION UNIT LEADER

### I. INTRODUCTION

During the course of any incident, a variety of documents are created that record incident activities, actions and decisions. Such documentation:

- Provides an historical record of the incident.
- Provides written plans for managing the incident.
- Provides a post-incident record for fiscal and legal purposes.

Under the Incident Command System (ICS) the responsibility for gathering and organizing the files for an incident is assigned to the Documentation Unit Leader (DOCL). This Job Aid, in conjunction with the Documentation Unit Leader Task Book, is designed to train personnel for the DOCL position and is also intended to be used as an on-the-job reference for qualified Documentation Unit Leaders.

Topics covered in this Job Aid include procedures for mobilizing and demobilizing on an incident, duplication of the Incident Action Plan (IAP), and requirements for maintaining incident records, including specific requirements for records of federal wildland fire incidents.

An additional reference is in the Fireline Handbook, Planning.

Recommended training:

- Intermediate ICS (I-300)
- Documentation Unit Leader Job Aid (J-342)
- Basic Wildland Fire Orientation (S-110)

## II. POSITION RESPONSIBILITIES

The Documentation Unit is responsible for:

- Duplicating the IAP for each operational period and assisting other incident functional areas with photocopying needs.
- Maintaining incident documentation in easily accessible files during incident operations.
- Establishing the Incident History File (IHF) on federal wildland fire incidents and maintaining the remainder of the incident documentation to established national standards.
- Boxing incident files for efficient retrieval for post-incident use.
- Turning over completed documentation files to the incident Planning Section Chief (PSC), host agency, or another DOCL.

The Documentation Unit may also be the primary faxing location for the incident. This might necessitate delivering received faxes to appropriate incident personnel.

On a small incident, the documentation tasks may be quite simple and can easily be done by other Planning Section staff. The complexity of an incident governs when a Documentation Unit is activated. In most cases, the Documentation Unit will consist of only the DOCL; however, a Resource Clerk may be needed for more complex incidents.



It is also the responsibility of the DOCL to apply the Incident Command System, including following chain of command and using appropriate ICS forms and terminology.

### III. ENSURE READINESS FOR ASSIGNMENT

#### A. Obtain and Assemble Materials for Kit

Assemble DOCL kit prior to receiving assignment and be self sufficient for first 48 hours. Duration of assignment may be uncertain; plan for 14 days.

Contents of the DOCL kit may vary depending upon incident complexity, but may include the following:

- Job Aid: J-342, DOCL
- ICS-214 Unit Log and ICS-213 General Message. Blank Overhead and Crew Performance Evaluation forms are also helpful to have on hand. Sometimes these are available from the Plans Kit which is part of the initial cache van order.
- Office supplies (marking pens, pads, large rubber bands, tape, white out, paper clips, thumb drive, etc.).
- Wildland Fire Incident Records Management policy guidance documents, filing directories, instructions, filing index, labels, and kit components. These tools are located at: <http://www.nifc.gov> (look for link to Records Management).

This website provides information and instructions on building, labeling, and filing federal wildland fire incident records to meet interagency records management policy. It may be feasible to already have file folders prepared and/or labels printed to take to an incident.

## B. Obtain Information from Dispatch

Upon dispatch, establish situational awareness by obtaining the following:

- Incident name
- Incident order number
- Request number
- Incident phone number
- Reporting time
- Reporting location
- Transportation arrangements/travel routes
- Contact procedures during travel (telephone/radio)
- Expected duration of assignment
- Current situation (from National Interagency Fire Center [NIFC] or InciWeb websites)

#### IV. ARRIVAL AND INITIAL SETUP RESPONSIBILITIES

##### A. Arrive at Incident and Check In

The DOCL should check in at the designated incident location according to agency guidelines within acceptable time limits. Information needed, such as Request Number (“O” number), unit ID, reporting location, etc., can be found on your Resource Order.

Take your Incident Qualifications Card (red card) with you and be prepared to show it at check-in. Identify any other qualifications you have during the check-in process.

If you brought Position Task Books (PTBs) with you for trainee positions, be sure that information is also captured. If you are a trainee, or are able to perform in one of your trainee positions, check in with the Training Specialist to ensure and document an appropriate training assignment.

B. Coordinate With and Obtain Initial Briefing from Planning Section Chief (PSC)

Obtain the following information during the initial briefing:

- Incident size and potential.
- Procedures for ordering resources and supplies.
- Operational work period.
- Status of staffing, if any, for the Documentation Unit. Will there be day/night operational periods?
- General orientation to the Incident Command Post (ICP) and/or incident base.
- Provisions for photocopying. Does a copy service/equipment need to be ordered?
- Timelines and priorities with regards to duplication needs for the IAP vs. other photocopying requests for incident personnel.
- Expectations for attending meetings/briefings.
- Safety concerns/hazards.

## C. Organize Work Area

Plan ahead and anticipate needs as incident complexity changes to avoid playing catch up throughout the incident.

As a minimum, consider the following:

1. Coordinate with PSC and Logistics Section to obtain:
  - Work space – preferably near or with the photocopier; and with convenient access to PSC.
  - Equipment – copy machine(s), fax, and computer. Consider potential impacts of environmental conditions.
  - Supplies – table, chairs, office supplies, file boxes, copy paper, etc.
  - Transportation arrangements (i.e., to drive to duplication service).
2. Plan for possible expanding operation (night operations).
3. Consider traffic flow (separate work space from walk-in traffic).
4. Ensure adequate space for boxes to gather incoming materials and area to sort documents for filing.

5. Ensure adequate signage for your work location and in-box for incoming documents (i.e., performance evaluations, unit logs, etc).
6. Switch over to using incident supplies, rather than personal kit supplies. Order supplies to restock personal kit.

## V. MANAGE UNIT AND PERSONNEL

The DOCL is responsible for all management and supervision activities within the unit. An additional reference is the Fireline Handbook, Common Responsibilities.

### A. Staffing

Normally, this unit does not require additional staff; however, if 24-hour operation is required to provide copy services, additional staff will be needed.

#### 1. Determine level of staffing

General staffing level is based on the following:

- Size of the incident
  - Complexity of the incident
  - Incident stage (initial build-up, middle, demobilization)
  - Operational periods (day/night)
- #### 2. Communicate staffing needs to the PSC.
- #### 3. Order/cancel/release personnel as appropriate using an ICS-213 (General Message form) to the Resources Unit Leader (RESL).

Refer to the Appendix pgs. 33-40, for examples of completed ICS-213s for ordering/releasing personnel.

## B. Leadership and Supervision

As a Unit Leader, it is extremely important to model leadership values and principles.

### 1. Operational Leadership

- Incident Response Pocket Guide (IRPG) NFES# 1077. Review operational leadership section in IRPG.
- For additional leadership hints and information, visit the Leadership website: [www.fireleadership.gov](http://www.fireleadership.gov)

### 2. Supervision and Teamwork

- Provide for the safety, welfare, and accountability of unit personnel.
- Establish effective working relationships.
- Establish work cycles/shifts for assigned personnel. Ensure compliance with work/rest guidelines.
- Make assignments and delegate tasks.
- Brief unit personnel regularly. Ensure Unit Leader expectations are communicated and understood.
- Develop teamwork to maintain positive interpersonal relationships.
- Evaluate and provide feedback.
- Review and approve subordinate time reports.



- Complete personnel performance ratings according to agency guidelines on appropriate form.
- Provide meaningful training opportunities and sign task books as necessary.
- Coordinate activities with other units.

### C. Order/Release Equipment and Supplies

1. Follow procedures as directed by PSC.
2. Order/cancel/release equipment and supplies to support ongoing needs of unit using an ICS-213 with the following information:
  - Description of what is needed. Be specific and include NFES number as appropriate.
  - Quantity
  - Date/time needed
  - Where it should be delivered
  - Approval signatures

Refer to the Appendix for examples of completed ICS-213s for ordering/releasing equipment and supplies.

The DOCL is generally in charge of maintaining an adequate supply of all 8.5 x 11 paper required by the incident. Be sure to keep track of the quantities on hand.

Copying the IAP requires a huge amount of paper. Be sure to order sufficient quantities with enough lead time. It would not be unreasonable, on a large incident, to order 20 cases of paper.

For copying maps, order appropriate amounts of 8.5 x 14 and 11 x 17 paper, as well. In addition, pay attention to maintaining an adequate supply of toner cartridges.

If using a copy service (trailer service or other commercial source), the paper is supplied as part of the contract or service. In that case, the only need may be to supply incidental paper to any other copiers/faxes/printers which are rented by the incident.

#### D. Demobilize the Unit

1. Follow these steps for demobilizing the Documentation Unit.
  - Demobilize as directed by PSC. Read a copy of the Demob Plan for specific demob information.
  - Prepare unit narrative; submit to PSC (if required).
  - Dismantle and return equipment and supplies.
  - Clean work area.

2. If there are additional Documentation Unit personnel, the following applies:
  - Brief unit personnel on procedures for closing out unit operations.
  - Release personnel by submitting ICS-213 to the Demob Unit. You may need to complete performance rating and PTB evaluations for trainees.
  - Inform unit personnel of scheduled releases and demobilization procedures.

#### E. Transfer of Position

In the event you are being relieved, you will need to transfer information and documentation.

1. Types of transfers
  - Team to team (Type 1 to Type 2)
  - Team to host agency
  - DOCL to individual (your replacement)
2. Methods to convey incident status information
  - Formally brief the incoming DOCL, host agency, or individual.
  - The other DOCL or individual can shadow you in your job.
  - Leave written instructions.

### 3. Content to convey

- Unit personnel, if any
- Equipment and supplies being left behind
- Location of documentation
- Overview of Unit's operational procedures
- Items that need follow-up

## VI. DOCUMENTATION UNIT DUTIES

### A. Duplication of IAP (proofing, editing, copying and collation)

1. Consider various alternatives for duplicating the IAP (e.g., on site by incident personnel, off-incident, commercial, contract services).

Most incidents order large copiers as part of the initial incident order(s). Check with the Supply Unit to see what has been ordered. If no provision for photocopying has been made, confer with the PSC on what type/size/quantity of photocopying equipment/services will be needed.

Remember to include the needs of the entire incident when ordering copier equipment/services.

- Agency copy machines

Until an alternative source of copying is available, the initial IAPs for the incident may need to be copied using equipment of the host agency. If these are to be used, be sure the host agency has enough paper, supplies, staples, etc., to support the project.

- Local commercial copy service

Until a copier or a mobile office service arrives, some incidents may use a local commercial copy service to produce the IAP. Be sure a method of payment is worked out ahead of time by the Procurement Unit Leader to pay for these services. Use of a personal agency credit card is not recommended. However, if used, be sure to get an S# from Supply Unit to reconcile your credit card.

- Mobile office service

Some incidents order complete mobile office services under an Emergency Equipment Rental Agreement (EERA). These mobile office services arrive in a trailer arrangement with copiers, supplies and personnel capable of operating 24/7. The service provides copying capability for the entire incident.

If there is a service at the incident or on order, a majority of the DOCL photocopying tasks will be done by the service. It is important to interface with them on how the documentation products (IAPs) are to be formatted and handled. The DOCL should confer with the PSC about the process for signing daily copy service invoices.

Most copy services are able to provide half-size copies of the IAP. They can also provide lamination services, produce signs for incident functions, and often have plotter capabilities.

Ensure the contract has a payment adjustment clause in case the copier(s) are out of service for longer than a specified amount of time. If it doesn't, confer with the Contracting Officer to amend as appropriate.

- Ordering rental copier equipment

When renting copiers, order equipment that has sorting, stapling, duplex, and multiple paper tray capabilities. Digital scanning equipment is much faster, but not always available.

2. Ensure copying equipment is operational.

If photocopying will be done on rented copiers, be sure to receive operating instructions, jam clearing instructions, and a HELP number from the company supplying the equipment. The HELP number should be available seven days a week as part of the contract. Should anything not function on the copier, call immediately for assistance as travel distances for repairs can be considerable.

Location of the equipment is critical as environmental conditions such as temperature, dust and humidity are issues. As much as possible, keep the machines AND the boxes of paper inside a room/building. Humidity will swell the paper which will cause it to jam.

3. Ensure maintenance contracts are in place when necessary and meet unit needs.

Check with the Procurement Unit Leader regarding the need for contracts and any associated issues. Ensure the vendor provides all toner in order to get the correct product for the equipment being supplied.

4. Establish priorities for copying in conjunction with Planning Section time frames.

Copying the IAP for each operational period is the highest priority for the Planning Section. Copying for other sections/units is a lower priority. Be wary of allowing individuals to use the copy machines as this could jeopardize IAP production should something go wrong.

If individuals have large copy projects, supervise the photocopying or further control access by making copies for them. Develop a system for requesting copies. For example:

- Designate a box for requests
- Attach item to be copied to an ICS-213 which should specify:
  - How many copies are needed
  - When they should be completed
  - Who to contact in case of questions
  - Who should be notified when job is completed

- ICS-213 forms could be preprinted with the above questions to ensure every order has all the needed information.
  - Make sure this system is communicated to all incident personnel.
5. Anticipate and plan for future incident copying needs.

If the incident continues to expand, additional photocopy equipment may be necessary. If the Finance Section becomes a frequent user of the copier, discuss with the PSC that Finance may need to order its own equipment (often Finance has a copier on the initial order for the section).

6. Ensure contingency plans are in place for backup (alternative) copying equipment/services.

Some ICPs are located at schools. Usually, the incident rents copiers and the school's equipment can be used as a backup. If the incident is located near a town with a commercial copy service, that might be designated as the backup. Alternately, the host agency may have adequate copiers to provide backup to the incident.

It is important to have a backup plan in place capable of printing at least enough IAPs for Operations personnel for each operational period. Discuss a backup plan with the PSC and the Resource Unit Leader.



## B. Assembling the Incident Action Plan

The Resource Unit is responsible for completing many of the forms that are assembled to complete the IAP. On some teams, the Resource Unit produces or collects all the forms to create the IAP and, in conjunction with the PSC, proofreads and assembles the pages in the correct order before giving to the DOCL for copying.

On other teams, the Resource Unit only completes the ICS-203 Organization Assignment List and ICS-204 Assignment List. The DOCL is responsible for collecting the other components from the appropriate incident personnel, assembling the pages in the correct order, providing the original document to the PSC for review and signature, and photocopying it. Clarify with the PSC who is responsible for what pages of the IAP, what your responsibilities will be, and what role the PSC will have in proofing the IAP.

Using a checklist of IAP components is helpful to track progress on completion of the IAP. The DOCL should check each component as it is received for errors.

The IAP can take considerable time to prepare which will require the DOCL to wait until late in the day/night to actually start the photocopying. If collating and stapling the copied IAP is also required, it could be an all night/day job. Planning ahead for this scenario may mean a shift that starts late in the day and continues through most of the night. This scenario reinforces having a copier capable of automatic collating and stapling.

1. Prepare for copying.

Before beginning the IAP copying job, number the pages in pencil on the back. This helps if the master IAP is dropped or jams in the copier.

2. Produce copies within established time frame.

IAP copies should be finished at least one hour before the operational period briefing. You may also be asked to post the IAP to a bulletin board near the briefing area. All other photocopying for other sections/units should be completed within a reasonable time frame that does not conflict with production of the IAP.

3. Determine in conjunction with the PSC:
- Number of IAP copies needed.
  - How many full size and half size copies (if duplication equipment/services have that capability).
  - If doubled-sided copies will be the IAP standard.
  - Whether you need to bundle copies for operations, divisions, and other sections (requires banding and appropriate bundle labels), or will you put all copies in one box?
  - Where should you leave all the copies (bundles, etc.)?
  - Do you need to bundle copies for remote camps or other entities not located at the ICP? Do you need to leave them with a driver or send a General Message request?
  - Who needs to receive faxed copies? Examples of typical places where you may need to fax or email copies include:
    - air tanker bases/helibases
    - expanded dispatch
    - other agency offices
  - If you need to post the IAP to an ftp site.

4. Estimate IAP quantities needed using the following general guidelines:
  - 2 – 4 copies per hand crew
  - 1 copy per equipment item (engine, watertender, dozer, etc.)
  - 1 copy per line overhead plus trainees
  - 1 copy per unit leader/section chief plus trainees
  - 1 bundle of multiple copies for helibase – depends on number of people/resources
  - 1 bundle of multiple copies for public information officer (quantity to be determined if needed)
    - Unspecified extra copies (base this on whether previous printing was short of needed copies, or there were excessive extras, or what resources have been ordered or are expected).

5. Specific instructions for associated incident maps:

Maps are sometimes not attached directly to the IAP. Depending upon the size of the fire, there may be separate map “sets” showing the fire on several pages (generally on 11 x 14 paper).

The Situation Unit may not have the maps ready for printing when the IAP is ready to copy. In that case, suggest to the PSC that you can print the IAP and staple the maps to it later, or provide a separate stack of maps for personnel to pick up. Be sure any bundles/packages you assemble include map sets.

In general, you will not be able to fax maps printed on 11 x 14 paper. Ask the receiving unit if they can accommodate that size fax paper or see if you can reduce the map size to 8.5 x 11 using the copy equipment/service. Alternatively, you may be able to get with the Situation Unit and save a PDF version of the maps on a thumb drive and email them to the recipients.

6. ICS-214 Unit Logs:

The ICS-214, Unit Log is usually the last page of the IAP. It should always be a separate page and not double-sided to another page if practical, based upon copying/collating limitations. The front of the ICS-214 should face the back of the IAP. This way, people can flip over their IAP and immediately be able to write on the front of the ICS-214.

## C. Filing Documentation and Establishing the Incident History File

Fire incident documentation should be filed according to the guidelines established under interagency wildland fire records management policy (revised 2005). Use these guidelines to prepare, organize and maintain all incident records during the incident and for creating the Incident History File for the final documentation package.

The guidelines can be found at the NIFC website:  
<http://www.nifc.gov/policies/records>

Note: The records management policy at the NIFC website applies only to wildland fire incidents. Although Incident Management Teams (IMTs) may be assigned to help manage other all-hazard incidents such as hurricanes, earthquakes and other disasters, the process described here does not apply because FEMA has different requirements for retaining records. However, if some of the tools described below are helpful for organizing documentation on these incidents, they can be used and modified as appropriate.

Consider posting a list of documentation that needs to be turned in, based on the fire records management guidelines. Ask the PSC to periodically announce at meetings that units should turn in their documentation daily. When units wait until the close of the incident to provide documentation, it creates a huge amount of work for the DOCL, which is unacceptable.

## VII. RETENTION GUIDANCE

A general summary of what incident documents are considered to be of permanent value and must be protected as part of the IHF are shown on the Retention Guidance Sheet at the NIFC website. If there are questions about how long documents are saved, use this guide as a handy reference.

### A. Creating the Incident History File

The IHF will contain the incident documents with permanent value that will ultimately be sent to the National Archives. Refer to the Retention Guidance document to determine which documents will be included in the IHF. Refer to the IMT Instructions for how to develop the IHF. It is important that this file be segregated from the rest of the incident documentation, adequately labeled, and given special care by the DOCL, especially during incident closeout.

### B. Tools for Incident Management Teams

The website section entitled “Tools for Incident Management Teams” contains a variety of information and aids to help the DOCL meet the interagency wildfire management policy requirements and provide a nationally standardized system for organizing incident documentation.

## 1. Incident Management Team Instructions

IMT Instructions detail exactly how to create the IHF, use the IMT file directory, indexes and labels, organize documents in files, create a “records kit,” and what to do with financial and confidential records. This should be a primary reference for the DOCL.

## 2. Graphic Examples for File Organization

Graphic examples are a visual aid to show the DOCL how to organize the incident files to a national standard that will minimize problems associated with team transition. Distributing copies to each section/unit will help organize their records and facilitate creation of the final documentation package by the DOCL.

## 3. IMT Filing Labels

Filing labels that mirror the Final Documentation Index are part of the tool package available on the NIFC website. See the IMT Instructions for tips on formatting, use, and purchasing label stock.

## 4. Incident Records Kit

The “Incident Records Kit” document on the NIFC website will help the DOCL assemble a pre-incident records kit or acquire the needed supplies through Procurement on an incident. Use the ICS-213, General Message Form, to order these items.



## 5. Indexes

Both a Final Documentation Index and individual IMT Box Indexes are available tools on the NIFC website. These are helpful for keeping track of document location during an incident and for assembling the final incident documentation package. (Refer to the IMT Instructions for more information on using both types of indexes.)

## 6. Setting up Documentation Boxes and Files

Plastic boxes with hanging files work well for storing documentation on the incident. If you are not able to obtain plastic boxes, hanging folders, etc., paper file boxes with folders will work.

Be sure that all boxes are labeled for post-incident handoff as “Box 1 of X,” etc., and includes the incident name and number.

Documentation inside each folder is generally filed in date order with the most recent date toward the front. Briefly review documents to see if there are any obvious errors or omissions (i.e., operational period not being filled in on a unit log). Confer with the PSC whether the date received should be marked on each document with the date it is received by the Documentation Unit.

Extra carbon copies (particularly of ICS-213s) are not necessary to keep and take up space in the files.

At closeout, any folders that were initially set up, but which have nothing inside, should be taken out of the files so as not to add confusion.

## 7. Electronic Data

Electronic documents are filed according to a national file standard. These files are maintained by the incident computer technical specialist(s). It is their responsibility to provide an incident file CD to Documentation. Remember to print a copy of the “permanent” maps and carefully fold them to include in the Incident History File.

CDs or other electronic data kept for documentation purposes should be filed separately from the official paper files. Be sure CDs are in a protective cover and are well labeled with metadata which includes the version of the software used to create the data. Otherwise, it may be useless to the host unit.

## 8. Finance Section Documentation

The Finance Section generally creates and manages their own documentation files and boxes. The Finance Section usually has a separate closeout with the host agency. Most of the information contained in these boxes is retained by the host agency and not needed for the final package. However, be sure to get the Final Statement of Costs to include in the IHF.

## 9. Handing off the Final Documentation Package

Provide for Planning Section Chief review of the final documentation package and who will receive it.

Usually the host agency takes the boxes at the closeout. Be sure some arrangement has been made for the boxes to be given to the agency. If you are transitioning to another team, the documentation should remain in the Planning Section until the incident is closed.

### C. Completing the Unit Log

A Unit Log (ICS-214) should be completed by the DOCL for each operational period and submitted to the PSC. Only significant events that occurred during the shift should be recorded on the log.

## VIII. ASSISTANCE WITHIN THE PLANNING SECTION

The DOCL is also expected to offer assistance to other functions within the Planning Section as needed to meet the Section's priorities and time frames. Assistance may include:

- Assisting the Resource Unit Leader in compiling the IAP.
- Assisting the Situation Unit Leader in collecting information for the ICS-209, Incident Summary.
- Assisting the Status Check-in Recorder in collecting resource information using resource status system software (be sure you are given specific instructions on software use).

## IX. DEMOBILIZATION

The Demobilization Plan may specify that the DOCL is the designated signatory for the ICS-221 for resources being demobilized. That DOCL will certify that overhead or other resources have turned in all required documentation. Coordinate with the PSC on the documentation required by resources upon demobilization. Unit logs and performance evaluations are generally required.

## X. FIRE RECORDS IMPLEMENTATION SURVEY

Input from DOCLs related to the incident records management process is important. Please fill out the survey found on the NIFC website, if time permits, to provide valuable information for improvements/changes.

# **APPENDIX**

## **COMPLETED ICS-213s (GENERAL MESSAGE FORMS)**



<b>GENERAL MESSAGE</b>		
<b>TO:</b> Supply Unit	<b>POSITION:</b>	
<b>FROM:</b> Documentation Unit Leader	<b>POSITION:</b>	
<b>SUBJECT:</b> Overhead Order	<b>DATE:</b>	<b>TIME:</b>
<b>MESSAGE:</b>		
<p>Needed: 7/12 0600  1 ea. DOCL qualified  1 ea. DOCL trainee acceptable</p>		
<b>SIGNATURE:</b>  /s/	<b>POSITION:</b>	
<b>REPLY:</b>		
<b>DATE:</b>	<b>TIME:</b>	<b>SIGNATURE/POSITION:</b>

GENERAL MESSAGE		
TO: Demob Unit	POSITION:	
FROM: DOCL	POSITION:	
SUBJECT: Release of Overhead	DATE:	TIME:
MESSAGE:		
Release: 0-28 Mary Smith, DOCL 7/20 0600 has AOU for transportation would like reassignment 7 days remaining other quals: SCKN, EQTR		
SIGNATURE: /s/	POSITION:	
REPLY:		
DATE:	TIME:	SIGNATURE/POSITION:



<b>GENERAL MESSAGE</b>		
<b>TO:</b>	Supply Unit	<b>POSITION:</b>
<b>FROM:</b>	Documentation Unit Leader	<b>POSITION:</b>
<b>SUBJECT:</b>	Order Copy machine	<b>DATE:</b> <b>TIME:</b>
<b>MESSAGE:</b>		
<p>Needed: 7/11 1800</p> <p>2 ea. Digital copy machine</p> <p>Staple, sort, duplex multiple size paper trays</p> <p>Minimum 20 pgs/minutes</p> <p>Include maintenance contract for toner and 24 hr repair service</p>		
<b>SIGNATURE:</b>	/s/	<b>POSITION:</b>
<b>REPLY:</b>		
<b>DATE:</b>	<b>TIME:</b>	<b>SIGNATURE/POSITION:</b>

<b>GENERAL MESSAGE</b>		
<b>TO:</b> Supply Unit	<b>POSITION:</b>	
<b>FROM:</b> DOCL	<b>POSITION:</b>	
<b>SUBJECT:</b> Release of Equipment	<b>DATE:</b>	<b>TIME:</b>
<b>MESSAGE:</b>		
Release: 1 ea. copy machine from AJ Printing Co. available for pickup 7/20 1000		
<b>SIGNATURE:</b>  /s/	<b>POSITION:</b>	
<b>REPLY:</b>		
<b>DATE:</b>	<b>TIME:</b>	<b>SIGNATURE/POSITION:</b>

<b>GENERAL MESSAGE</b>		
<b>TO:</b> Supply Unit	<b>POSITION:</b>	
<b>FROM:</b> Documentation Unit Leader	<b>POSITION:</b>	
<b>SUBJECT:</b> Supplies & Equipment Order	<b>DATE:</b>	<b>TIME:</b>
<b>MESSAGE:</b>		
<p>10 cs 8.5 x 11 white Xerox paper  2 cs 11 x 14 white Xerox paper</p> <p>2 ea. folding tables  2 ea. chairs</p> <p>Deliver to Classroom 2B  Needed: 7/12 1200</p>		
<b>SIGNATURE:</b>  /s/	<b>POSITION:</b>	
<b>REPLY:</b>		
<b>DATE:</b>	<b>TIME:</b>	<b>SIGNATURE/POSITION:</b>

<b>GENERAL MESSAGE</b>		
<b>TO:</b> Supply Unit	<b>POSITION:</b>	
<b>FROM:</b> DOCL	<b>POSITION:</b>	
<b>SUBJECT:</b> Release Supplies	<b>DATE:</b>	<b>TIME:</b>
<b>MESSAGE:</b>		
Release and available for pick up at documentation unit Classroom 2B 7/20 1000 2 ea. folding tables & chairs 2 cs copy paper		
<b>SIGNATURE:</b>  /s/	<b>POSITION:</b>	
<b>REPLY:</b>		
<b>DATE:</b>	<b>TIME:</b>	<b>SIGNATURE/POSITION:</b>