



**FEMA**

POSITION TASK BOOK FOR THE POSITION OF

**ALL-HAZARDS NATIONAL INCIDENT  
MANAGEMENT SYSTEM (NIMS)  
DOCUMENTATION UNIT LEADER (SINGLE  
TYPE)**

## DOCUMENTATION UNIT LEADER (SINGLE TYPE)

### 1. Competency: Assume position responsibilities

*Description:* Successfully assume the role of Documentation Unit Leader and initiate position activities at the appropriate time according to the following behaviors.

#### 1a. Behavior: Obtain information relevant to position assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>1.</b> Obtain and review necessary documentation: <ul style="list-style-type: none"> <li>● Copy of Delegation of Authority, Letter of Expectation, Letter of Agreement or Memorandum of Understanding (MOU)</li> <li>● Applicable plans and reports</li> <li>● Directories: phone, notification</li> <li>● Written incident status summary</li> <li>● Authorizations: cell phones, rental vehicles, computers</li> </ul>	E, F, I		
<b>2.</b> Receive briefing from the Planning Section Chief or the outgoing Documentation Unit Leader <ul style="list-style-type: none"> <li>● Meetings and briefings schedule</li> <li>● Situational assessment</li> <li>● Incident objectives</li> <li>● Strategy</li> <li>● Hazards to incident personnel and public</li> <li>● Agencies/jurisdictions involved</li> <li>● Organizational structure</li> <li>● Resources summary</li> <li>● Logistical needs</li> <li>● Ordering procedures</li> <li>● Incident priorities and status: life safety, incident stabilization, property and environment</li> <li>● Timing and scheduling</li> <li>● Expected products</li> </ul>	E, F, I		

#### 1b. Behavior: Establish or determine organizational structure, resource and staffing needs

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>3.</b> Evaluate staffing needs required to manage the unit <ul style="list-style-type: none"> <li>● Ensure consistency with National Incident Management System (NIMS) organizational structure</li> <li>● Identify training opportunities</li> <li>● Ensure use of established procedures for ordering resources</li> <li>● Request appropriate technical specialists to assist with special incident conditions</li> </ul>	E, F, I		
<b>4.</b> Utilize unit personnel: <ul style="list-style-type: none"> <li>● Establish appropriate organization and assign roles and responsibilities, while maintaining span of control</li> </ul>	E, F, I		

#### 1c. Behavior: Ensure readiness for assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>5. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines:</p> <ul style="list-style-type: none"> <li>● Arrive with go-kit and any additional equipment</li> <li>● Carry out check-in procedures and ensure assigned personnel do the same</li> </ul>	E, F, I		
<p>6. Obtain complete incident and logistical information</p> <ul style="list-style-type: none"> <li>● Incident name, number, anticipated duration, size, type, responsibilities and expectations</li> <li>● Reporting time and location</li> <li>● Transportation arrangements and travel routes</li> <li>● Contact procedures during travel (telephone/radio)</li> <li>● Expected working conditions</li> <li>● Personal Protective Equipment (PPE)</li> <li>● Security measures</li> <li>● Updated contact information and information links</li> </ul>	E, F, I		
<p>7. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable:</p> <ul style="list-style-type: none"> <li>● Supplies: <ul style="list-style-type: none"> <li>○ Office supplies appropriate to the function</li> <li>○ Authority Having Jurisdiction (AHJ) identification badge and qualification card</li> </ul> </li> <li>● Reference materials: <ul style="list-style-type: none"> <li>○ Functional guidelines relative to incident type (agency guidance or other functional guidelines)</li> <li>○ AHJ operations guides or other operational guides</li> <li>○ Position manuals</li> </ul> </li> <li>● Forms: <ul style="list-style-type: none"> <li>○ Agency-specific forms appropriate to the function</li> </ul> </li> </ul>	E, F, I		

## 2. Competency: Communicate effectively

*Description:* Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a potentially rapidly changing environment

### 2a. Behavior: Ensure the exchange of relevant information during briefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
8. Lead staff briefings and debriefings	E, F, I		
9. Prepare for and participate in briefings: <ul style="list-style-type: none"> <li>● Ensure briefings are accurate, timely and include appropriate personnel</li> <li>● Brief external support organizations</li> <li>● Share and evaluate information</li> </ul>	E, F, I		

### 3. Competency: Lead assigned personnel

*Description:* Influence, lead and direct assigned personnel to accomplish objectives and desired outcomes in a potentially rapidly changing environment.

#### 3a. Behavior: Model leadership values and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>10.</b> Create a positive work environment: <ul style="list-style-type: none"> <li>● Communicate leader's intent and guidance</li> <li>● Manage unit and its activities effectively</li> <li>● Proactively assume responsibility for the unit and initiate action</li> </ul>	E, F, I		
<b>11.</b> Establish and maintain positive interpersonal and interagency working relationships: <ul style="list-style-type: none"> <li>● Understand scope, roles, responsibilities, jurisdiction and authority of responding agencies</li> </ul>	E, F, I		
<b>12.</b> Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
<b>13.</b> Understand and comply with NIMS/Incident Command System (ICS) concepts and principles <ul style="list-style-type: none"> <li>● Establish and modify an effective organization based on changing incident and resource conditions</li> <li>● Maintain appropriate span of control</li> <li>● Act as a representative of incident leadership</li> </ul>	E, F, I		

#### 3b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>14.</b> Communicate with assigned personnel <ul style="list-style-type: none"> <li>● Communicate priorities, objectives, strategies and any changes</li> <li>● Inform personnel of their assigned tasks and expectations</li> <li>● Clearly explain conflict resolution procedures and ensure that personnel understand</li> <li>● Ensure that assigned objectives and expectations for the operational period are reasonable and accurate</li> </ul>	E, F, I		
<b>15.</b> Ensure debriefings occur and participate as necessary: <ul style="list-style-type: none"> <li>● Ensure incident situation status information is current and complete</li> </ul>	E, F, I		
<b>16.</b> Ensure that staff follows all applicable agency/jurisdiction policies, contracts, standard operating procedures and agreements: <ul style="list-style-type: none"> <li>● Federal, state, local, tribal, territorial and regional relationships, as appropriate</li> <li>● Roles and responsibilities of potential responder agencies</li> <li>● Scope, jurisdiction and authority of potential responder agencies' contingency plans</li> </ul>	E, F, I		

<p>17. Supervise and hold personnel accountable for executing assigned tasks:</p> <ul style="list-style-type: none"> <li>● Identify and promptly resolve disagreements, issues and misunderstandings</li> <li>● Prioritize work while considering immediate support for incident operations</li> </ul>	E, F, I		
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### 3c. Behavior: Ensure the health, safety, welfare and accountability of assigned personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>18. Demonstrate knowledge of and comply with relevant health and safety requirements:</p> <ul style="list-style-type: none"> <li>● Direct and oversee unit operations to ensure compliance with health and safety considerations and guidelines</li> <li>● Coordinate with the Safety Officer to ensure that assigned personnel follow safety guidelines</li> </ul>	E, F, I		
<p>19. Evaluate mental and physical fatigue of assigned personnel:</p> <ul style="list-style-type: none"> <li>● Ensure adequate rest is provided to section personnel</li> </ul>	E, F, I		
<p>20. Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk:</p> <ul style="list-style-type: none"> <li>● Adjust operations in response to hazards, weather and other relevant events</li> </ul>	E, F, I		
<p>21. Report or explain the procedures for reporting unexpected occurrences, such as fire, death, injury, illness, exposure to pathogens or hazardous materials (HAZMAT), accident, political contact or property loss or damage:</p> <ul style="list-style-type: none"> <li>● Ensure report contains nature of event, location, magnitude, personnel involved and initial action taken (such as helicopter picking up injured or an appropriate subsequent action)</li> <li>● Ensure the protection of Personally Identifiable Information (PII) while reporting</li> <li>● Obtain information from the following sources regarding special hazards, threats or unexpected occurrences: subordinates, personal observation, other incident personnel and off-incident personnel</li> </ul>			

### 3d. Behavior: Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>22. Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access</p>	E, F, I, J		
<p>23. Demonstrate the ability to identify opportunities for universal accessibility.</p>	E, F, I, J		
<p>24. Provide equal access, disability accommodations and access and functional needs (AFN) accommodations.</p>	E, F, I, J		

#### 4. Competency: Conduct operations and ensure completion of assigned tasks

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

##### 4a. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
25. Approve completed plans: <ul style="list-style-type: none"> <li>● Ensure plans are complete, accurate, realistically attainable and relevant to the incident objectives</li> </ul>	E, F, I		
26. Participate in the planning process: <ul style="list-style-type: none"> <li>● Prepare for and participate in planning meetings</li> <li>● Assist in the development of plans, as necessary:               <ul style="list-style-type: none"> <li>○ Long-range</li> <li>○ Strategic</li> <li>○ Contingency</li> <li>○ Demobilization</li> <li>○ Continuity of Operations Plan (COOP)</li> </ul> </li> </ul>	E, F, I		
27. Review, validate and modify plans: <ul style="list-style-type: none"> <li>● Analyze alternate strategies and explain decisions</li> <li>● Validate or revise unit objectives</li> <li>● Review information covering health and safety principles, known hazards and importance of all periods</li> <li>● Validate unit organizational structure</li> <li>● Validate unit resource assignments</li> <li>● Review reserve resources</li> <li>● Evaluate immediate support needs</li> </ul>	E, F, I, J		

##### 4b. Behavior: Set the unit priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
28. Analyze work assignments and staffing levels to ensure achievement of unit objectives.	E, F, I		
29. Attend and participate in strategy meetings as necessary: <ul style="list-style-type: none"> <li>● Assess organizational needs</li> <li>● Identify additional resource needs</li> <li>● Identify critical factors to ensure unit success</li> <li>● Prioritize incident, section and unit objectives</li> </ul>	E, F, I		
30. Disseminate priorities and expected completion timelines to staff	E, F, I		
31. Hold staff accountable for communicated priorities and deadlines	E, F, I		

##### 4c. Behavior: Coordinate with all appropriate personnel and stakeholders

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

32. Establish effective relationships and coordinate with incident personnel: <ul style="list-style-type: none"> <li>● IMT personnel</li> <li>● Other supporting personnel</li> </ul>	E, F, I		
33. Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).	E, F, I		

#### **4d. Behavior: Apply agency policy, contracts and agreements**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
34. Complete all work according to organization/agency direction, policy and incident objectives: <ul style="list-style-type: none"> <li>● Ensure that personnel complete all documentation requirements according to organization/agency direction, policy and incident objectives</li> </ul>	E, F, I		
35. Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints.	E, F, I		

#### **4e. Behavior: Ensure documentation is complete**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
36. Ensure that all personnel who handle data or intelligence are aware of and maintain a document security plan to manage the confidentiality and security of any classified, confidential, sensitive and For Official Use Only (FOUO) documentation, intelligence, data or incident information	E, F, I		
37. Ensure the protection of PII.	E, F, I		
38. Establish priorities for document duplication in conjunction with Planning Section time frames: <ul style="list-style-type: none"> <li>● Ensure existence of contingency plans for backup duplication services</li> </ul>	E, F, I		
39. Maintain and collect personal records related to incident: <ul style="list-style-type: none"> <li>● Time sheets</li> <li>● Rental records</li> <li>● Accident forms</li> <li>● Property records <ul style="list-style-type: none"> <li>○ Equipment time records</li> <li>○ Receipts</li> </ul> </li> </ul>	E, F, I		
40. Maintain and submit incident records for events, personnel, equipment, supplies and other data for incident management needs: <ul style="list-style-type: none"> <li>● Property loss/damage reports</li> <li>● Agency-required incident reports</li> <li>● Activity log</li> <li>● Changes in strategy and tactics</li> </ul>	E, F, I		
41. Review documentation for completeness and implement procedure to resolve inconsistencies <ul style="list-style-type: none"> <li>● Consult with document author</li> <li>● Bring to attention of appropriate section chief, branch director, group supervisor or unit leader</li> </ul>	E, F, I		



42. Review documents for accuracy, timeliness and appropriate distribution	E, F, I		
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**4f. Behavior: Provide duplication and documentation services**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
43. Develop or administer system for managing document duplication requests <ul style="list-style-type: none"> <li>• General message</li> <li>• File box</li> <li>• Electronic task request via emergency management software</li> </ul>	E, F, I		
44. Ensure availability of and access to secure storage	E, F, I		
45. Ensure that duplication equipment is operational.	E, F, I		
46. Produce final documentation package <ul style="list-style-type: none"> <li>• Include appropriate files from sections, branches, groups and units</li> <li>• Determine recipients for final documentation package</li> <li>• Provide package to Planning Section Chief for final review and approval</li> <li>• Complete index for final documentation package</li> </ul>	E, F, I		
47. Provide document duplication and collation services: <ul style="list-style-type: none"> <li>• Consider alternative document duplication services, such as on-incident or off-incident contract services</li> <li>• Anticipate and plan for future document duplication needs</li> </ul>	E, F, I, J		
48. Provide for duplication and distribution of Incident Action Plan (IAP) and other relevant plans: <ul style="list-style-type: none"> <li>• Determine number of copies necessary in consultation with the appropriate section chief</li> <li>• Produce and distribute copies within established time frame</li> </ul>	E, F, I		

**4g. Behavior: Create and maintain an incident records management system**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
49. Ensure the transfer of final documentation package for the AHJ, as appropriate <ul style="list-style-type: none"> <li>• Maintain chain of custody for all records and documents at closeout</li> <li>• Archive according to AHJ protocols</li> </ul>	E, F, I		
50. Establish filing system for documentation: <ul style="list-style-type: none"> <li>• Index files</li> <li>• Digital files</li> </ul>	E, F, I		
51. Function as the file custodian for incident records and documents <ul style="list-style-type: none"> <li>• IAP</li> <li>• Situation reports</li> <li>• Activity logs</li> <li>• Chronologies</li> <li>• Resource request forms</li> </ul>	E, F, I		

<b>52.</b> Maintain a set of easily portable critical files (mostly in electronic format) for rapid evacuation, in accordance with COOP planning	E, F, I		
<b>53.</b> Maintain control of and access to all incident-related files and records.	E, F, I		
<b>54.</b> Mark, secure and store all sensitive records and documents in a secure manner: <ul style="list-style-type: none"> <li>● Secure storage: locked file cabinet or room</li> <li>● Mark designation, if appropriate</li> </ul>	E, F, I		
<b>55.</b> Produce a backup method for files as appropriate: <ul style="list-style-type: none"> <li>● Emergency management software</li> <li>● Hard copies</li> <li>● Digital backup</li> </ul>	E, F, I		
<b>56.</b> Set up process for document collection: <ul style="list-style-type: none"> <li>● File box</li> <li>● Mailbox</li> <li>● Digital method</li> </ul>	E, F, I		

## 5. Competency: Prepare for demobilization/transfer

*Description:* Demobilize position and transfer position duties.

### 5a. Behavior: Transfer position duties while ensuring continuity

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>57.</b> Complete all necessary reports and narratives following common standards before turnover: <ul style="list-style-type: none"> <li>● Activity log</li> <li>● Shift change</li> <li>● End of operational period</li> <li>● Reassignment</li> <li>● Deactivation/demobilization</li> </ul>	E, F, I		
<b>58.</b> Complete the process for demobilizing position responsibilities: <ul style="list-style-type: none"> <li>● Brief and provide complete and accurate records to relief personnel</li> <li>● Discuss equipment release considerations</li> <li>● Coordinate with appropriate partners regarding demobilization procedures</li> <li>● Brief personnel on demobilization responsibilities</li> <li>● Ensure personnel demobilize in a timely and complete manner</li> <li>● Emphasize safety and accountability during this phase of operations</li> </ul>	C, E, F, I, J, T		
<b>59.</b> Coordinate an efficient transfer of position duties when deactivating or demobilizing resources <ul style="list-style-type: none"> <li>● Inform assigned personnel</li> <li>● Notify incoming personnel when and where transition of positions will occur</li> <li>● Conduct transition effectively</li> <li>● Document follow-up action and submit to agency representative</li> </ul>	E, F, I		
<b>60.</b> Participate in transition or incident closeout: <ul style="list-style-type: none"> <li>● Conduct debriefings with agency administrator(s) as requested</li> <li>● Close out incident as appropriate for the AHJ</li> </ul>	E, F, I		

### 5b. Behavior: Plan for demobilization and ensure staff follow demobilization process

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>61.</b> Participate in the development, approval and implementation of the demobilization plan: <ul style="list-style-type: none"> <li>● Coordinate with appropriate partners regarding demobilization procedures</li> <li>● Coordinate needs and responsibilities</li> </ul>	E, F, I		
<b>62.</b> Provide incident documentation in support of After Action Review (AAR) process	E, F, I		