Electronic Documentation Processes

This guide is designed for the individual(s) that are responsible for initial setup and managing of the electronic files.
# Table of Contents

- Introduction ................................................................................................................... 3
- Digital Naming Convention Cheat Sheet ........................................................................ 4
- How to Access Electronic Files ........................................................................................ 5
- Finance Channel Folders .................................................................................................. 6
- Uploads .............................................................................................................................. 7
- Comp Claims Unit ........................................................................................................... 8
- Cost .................................................................................................................................. 9
- Aircraft Cost Rotary Fixed Wing ....................................................................................... 10
- Aircraft Cost Rotary Fixed Wing ....................................................................................... 11
- eISUITE Daily Cost Tracking ........................................................................................... 12
- Procurement Unit ............................................................................................................. 13
- Accessing Procurement/Equipment Unit Files ................................................................. 14
- Ready for Payment Final Audit ......................................................................................... 15
- Procurement/Equipment File Naming Examples ............................................................... 16
- Procurement/Equipment File Naming Examples ............................................................... 17
- Contractor Performance Evaluation .................................................................................. 18
- Time Unit .......................................................................................................................... 19
- Accessing Time Unit Files ............................................................................................... 20
- Time Unit File Naming Examples .................................................................................... 21
- Time Unit File Naming Examples .................................................................................... 22
- Time Unit File Naming Examples .................................................................................... 23
- Information ....................................................................................................................... 24
- Inbox Flow Management-Setting Up the Rules ................................................................. 25
- Setting Up Power Automate in Email ............................................................................. 25
- Submitting Electronic Files to Finance .......................................................................... 26
- Finance Demob Procedures .............................................................................................. 26
- Batch Submission to Albuquerque Service Center (ASC) .............................................. 27
- DOI Batch Submissions ................................................................................................. 30
Introduction

The intent of this document is to provide standard operating procedures for incident files in Microsoft Teams. It provides an overall view of how files should look within the electronic documentation box. Examples are provided throughout the document. The NWCG Nationally approved electronic standards were utilized in the development of this guide.
Digital Naming Convention Cheat Sheet

This serves as guidance for files that are in the working environment. Final naming convention is subject to agency specific direction.

- Aircraft (A)
- Casual Hire (CH)
- COOPERATOR (COOP)
- Crew Time Report (CTR)
- Crews (C)
- Emergency Equipment Rental Agreement (EERA)
- Equipment (E)
- General Message (GM)
- Overhead (O)
- Resource Order (RO)
- Shift Ticket (ST)
- Virtual Incident Procurement (VIPR)

<table>
<thead>
<tr>
<th>DOCUMENT TYPE</th>
<th>NAMING CONVENTION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>CASUAL HIRE FORM</td>
<td>CH_LastName_RO#</td>
<td>CH_DOE_C9-18</td>
</tr>
<tr>
<td>COOPERATOR AGREEMENT</td>
<td>COOP_RO#</td>
<td>COOP_O80</td>
</tr>
<tr>
<td>CTR MULTIPLE DATES</td>
<td>CTR_RO#_Date(s) YYMMDD-MMDD</td>
<td>CTR_O35-54_220810-0812</td>
</tr>
<tr>
<td>CTR SINGLE DATE</td>
<td>CTR_RO#_Date YYMMDD</td>
<td>CTR_O35-54_220813</td>
</tr>
<tr>
<td>Interim OF286(286I)</td>
<td>286I_RO#_YYMMDD</td>
<td>286I_E118_220430</td>
</tr>
<tr>
<td>Interim OF288(288I)</td>
<td>288I_LastName_RO#_YYMMDD</td>
<td>288I_DOE_C9-18_220430</td>
</tr>
<tr>
<td>EERA</td>
<td>EERA_RO#</td>
<td>EERA_E118</td>
</tr>
<tr>
<td>EERA RATES</td>
<td>Rates_RO#</td>
<td>Rates_E101</td>
</tr>
<tr>
<td>EERA VENDOR INFORMATION</td>
<td>VendorInfo_RO#</td>
<td>VendorInfo_E101</td>
</tr>
<tr>
<td>EVALUATION</td>
<td>Eval_RO#</td>
<td>Eval_O80</td>
</tr>
<tr>
<td>FINAL OF286 (286F)</td>
<td>286F_RO#_YYMMDD</td>
<td>286F_E118_220430</td>
</tr>
<tr>
<td>FINAL OF288 (288F)</td>
<td>288F_LastName_RO#_YYMMDD</td>
<td>288F_DOE_C9-18_220430</td>
</tr>
<tr>
<td>FUEL LOG</td>
<td>Fuel Log_RO#_Date(s) YYMMDD</td>
<td>FuelLog_E38_20210810</td>
</tr>
<tr>
<td>FUEL ISSUE TICKET</td>
<td>Fuel Issue_RO#_Date(s) YYMMDD</td>
<td>FuelIssue_E38_20210810</td>
</tr>
<tr>
<td>ICS-213 (GENERAL MESSAGE)</td>
<td>GM_SUBJECT_RO#_YYMMDD</td>
<td>GM_Lodging_E5_220430</td>
</tr>
<tr>
<td>MANIFEST (ENGINE/CREW)</td>
<td>CM_RO#</td>
<td>CM_C7</td>
</tr>
<tr>
<td>POST-USE INSPECTION</td>
<td>POST_RO#</td>
<td>POST_E77</td>
</tr>
<tr>
<td>PRE-USE INSPECTION</td>
<td>PRE_RO#</td>
<td>PRE_E77</td>
</tr>
<tr>
<td>RESOURCE ORDER</td>
<td>RO_RO#</td>
<td>RO_O35-46</td>
</tr>
<tr>
<td>SHIFT TICKET</td>
<td>ST_RO#_Date(s) YYMMDD</td>
<td>ST_E118_210810</td>
</tr>
<tr>
<td>VIPR CONTRACT</td>
<td>VIPR_RO#</td>
<td>VIPR_E29</td>
</tr>
</tbody>
</table>
How to Access Electronic Files

Sign on to your FireNet account https://www.firenet.gov/. If you do not have a FireNet account request a guest account from your teams IT support.

Click on the Office 365 App Launcher and select the Teams Icon 📌

Click on Hidden Channels and select Finance_Channel

Select Files
Finance Channel Folders

- 0 Uploads
- 1 Comp
- 2 Cost
- 3 Procurement
- 4 Time Unit
- 5 Information
- 6 ICS_213_FSC_GMs
- 7 ICS_214_FSC_Unit_Logs
- 8 Final_Finance_eDOC_Box
Established through the Flow process
Comp Claims Unit

Each claim folder contains the document that pertains to the claim.

1 Comp

00 To Be Posted

01 Comp_for_Injury_Documents_Logs

02 Property_Damage_Claims_Logs
  - Claim #001
  - Claim #003
  - Claim #004
  - Claim #008
  - Claim #009
  - Claim #010
  - Claim #011
  - Claim #005 through #007

03 ICS_213_GMs

04 ICS_214_Unit_Logs

05 Property_Damage_Logs
# Aircraft Cost Rotary Fixed Wing

## Air Attack
- A90_N751BR
- A90_AA_N751BR_210701.pdf
- A90_AA_N751BR_210702.pdf
- A36_N721TB
- A73_N79BE
- A22_N145AF

## Helibase
- Safford_Helibase
  - A10_HEL2_933CH
    - A10 HEL2 933CH_210704.pdf
    - A10 HEL2 933CH_210705.pdf
    - A10 HEL2 933CH_210706.pdf
    - A10 HEL2 933CH_210708.pdf
  - A12_HEL3_N353JR
  - BlueLake_Helibase

## Tanker Bases
- Prescott_AirBase
  - A3_T84_210701.pdf
  - A3_T84_210702.pdf
  - Summary_210701-05.pdf
- Gateway_AirBase
  - A11_T72_210701.pdf
  - A11_T72_210702.pdf

Continued next page…
Continued…

Aircraft Cost Rotary Fixed Wing

Cal_Fire_Aircraft
- A10_HEL2_933CH
  - A10_HEL2_933CH_210704.pdf
  - A10_HEL2_933CH_210705.pdf
  - A10_HEL2_933CH_210706.pdf
  - A10_HEL2_933CH_210708.pdf

EGP_Reports
- A3_T810_SEAT
- A6_T910_SEAT
- A20_T912_SEAT
eISUITE Daily Cost Tracking

Every day needs Daily Cost Summary Graph
Accessing Procurement/Equipment Unit Files

3 Procurement Unit

04 Equipment_Time_Records_Claims

- 0 Ready_for_Payment_Final_Audit
- 01 Ready_for_Final_Finance_eDOC_BOX
- 02 Equipment
- 03 Crews
- 04 Overhead
- 05 Supplies
- 06 Cooperators
Ready for Payment Final Audit

Files in this folder have been completed by the equipment time recorder. Once the incident file has been audited, it is moved to 1 Ready for Final Finance eDOC BOX folder by the person completing the audit. A payment package is completed if applicable. Cooperators will take their paperwork home for processing at the end of the incident.

At the end of the incident 0 Ready for Payment Final Audit folder should be empty.
Procurement/Equipment File Naming Examples

- 310DustControl_E01_EERA
  - EERA_E1.pdf
  - PRE_E1.pdf
  - POST_E1.pdf
  - RO_E1.pdf
  - ST_E1_210715.pdf
  - ST_E1_210716-0719.pdf

- DNNEnterprises_E107_VIPR
  - VIPR_E107.pdf
  - OF286F_E107.pdf
  - Eval_E107.pdf
  - CTR_E107_210716.jpg

- PinionPineFireDistrict_E32_COOP
  - COOP_E32.pdf
  - CTR_E32_210716.jpg
  - CTR_E32_210711-0715.pdf
  - OF288F_PinionPine_E32_210716.pdf
Procurement/Equipment File Naming Examples

Active Resources

310DustControl_E118
- VIPR_E118.pdf
- RO_E118.pdf
- ST_E118_210714.jpg
- ST_E118_210715.pdf
- ST_E118_210716-0719.pdf
- ST_E118_210720.pdf

A1Water&DumpTruck_E233

AllenFireLLC_E260

AmericanWildfireSuppressionServices_E111

To Be Posted

MealandLodgingAuth_COOP.pdf
- CTR_E242-1_210621-22.pdf
- CTR_E242-2_210621.jpg
- CTR_E242-2_210622-0623.pdf
- DeliveryTicket_E132-135.pdf
- FuelLog_E132_210624.pdf
- ST_E132_210624.pdf
Contractor Performance Evaluation

Copy all Evaluations from the VIPR Agreement folders to 03 Contractor Performance Evaluation Folder:

3 Procurement Unit

03 Contractor_Performance_Evaluations

The Procurement or Time Until Leader will send the performance evaluations to the VIPR Email: Perform.ct5w8ujt8vot9yi@u.box.com, or can be uploaded by clicking HERE.

Submit VIPR IBPA Performance Reviews (No National Agreements)

Save File as the Company's Name & Fire Name. File Description is the Agreement Number & CO. Click on Submit. THANK YOU!

Upload files *

Drag and drop files

Select Files

File description *

Add additional information

Submit
Accessing Time Unit Files

- 4 Time Unit
  - 02 Personnel_Time_Records
    - 01 Ready_for_Final_Finance_eDOC_BOX
    - 02 Overhead A-M
    - 03 Overhead N-Z
    - 04 Cooperators
    - 05 Crews **Helitack Crews included**
    - 06 Equipment
  - 0 Ready_for_Payment_Final_Audit
Time Unit File Naming Examples

Crews

H520_A49
- CTR_A49-1_210619.pdf
- CTR_A49_210613.pdf
- CTR_A49_210614.jpg
- CTR_A49_210615.pdf
- RO_A49.pdf
- ST_E118_210720.pdf

H531_A10
- HT42_A9

FortApacheIHC_C5
- CTR_C5_210703.pdf
- CTR_C5_210704.pdf
- CTR_C5_210705-0709.pdf
- Manifest_C5.pdf
- 288I_C5_210709.pdf
- 288I_FortApacheIHC_C5_210711.jpg

PrescottIHC_C1
- RedCedarCC_C16
- NavajoScoutsI_C3
- FlagstaffIHC_C8
Time Unit File Naming Examples
**Time Unit File Naming Examples**

- **AZ_SED_Team_O80_COOP**
  - CTR_O80_210702.pdf
  - CTR_O80_210703-07.pdf
  - RO_O80.pdf
  - RO_O80.1.pdf
  - RO_O80.2.pdf
  - COOP_O80
  - ST_O80_210704-0705.pdf
  - OF286F_O80_210702.pdf

- Cooperators
Inbox Flow Management - Setting Up the Rules

4. TIME FLOW RULE
If the message has an attachment and the message includes specific words in the subject ‘TIME’ or ‘CTR’ or ‘PERSONNEL’ or ‘CREW’, apply the following category: “4. TIME FLOW” move the message to folder ‘4 TIME’ and stop processing more rules on this message.

3. PROC FLOW RULE
If the message has an attachment and the message includes specific words in the subject ‘PROC’ or ‘SHIFT TICKET’ or ‘cont’ or ‘equipment’, apply the following category: “PROC FLOW”, move the message to folder ‘3.PROC’ and stop processing more rules on this message.

2. COST FLOW RULE
If the message has an attachment and the message includes specific words in the subject ‘COST’, apply the following category: “2. COST FLOW”, move the message to folder ‘2.COST’ and stop processing more rules on this message.

1. COMP FLOW RULE
If the message has an attachment and the message includes specific words in the subject ‘COMP’ or ‘CLAIMS’, apply the following category: “1.COST FLOW”, move the message to folder ‘1.COMP’ and stop processing more rules on this message.

Setting Up Power Automate in Email

![Setting Up Power Automate in Email](image)
Submitting Electronic Files to Finance

Finance Email: 2022.FIRENAME_finance@firenet.gov

<table>
<thead>
<tr>
<th>Overhead, Crews, Cooperator Resources</th>
<th>Documents to email finance:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TO:</strong> <a href="mailto:2022.FIRENAME_finance@firenet.gov">2022.FIRENAME_finance@firenet.gov</a></td>
<td><strong>Regular Government Personnel, ADs and Cooperator</strong></td>
</tr>
<tr>
<td><strong>SUBJECT:</strong> Include Keyword: <strong>TIME</strong></td>
<td><strong>Check-In:</strong> Crew Manifest, MOUs, or Cooperative Agreement (if applicable), AD Single Resource Casual Hire, Resource Orders</td>
</tr>
<tr>
<td><strong>EXAMPLE:</strong></td>
<td><strong>Daily:</strong> Crew Time Report (CTR) Shift Tickets (if applicable), receipts (fuel issue, etc.)</td>
</tr>
<tr>
<td><img src="image" alt="Email Form" /></td>
<td><strong>@Demob:</strong> Signed OF288, Final Equipment Use Invoice (Cooperator), Demob Sheet</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contract Resources</th>
<th>Contract Resources documents to email Finance:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TO:</strong> <a href="mailto:2022.FIRENAME_finance@firenet.gov">2022.FIRENAME_finance@firenet.gov</a></td>
<td><strong>Private</strong></td>
</tr>
<tr>
<td><strong>SUBJECT:</strong> Include Keyword: <strong>Equipment</strong></td>
<td><strong>Check-In:</strong> Resource Order, Full Contract/Agreement, Certifications (if applicable), Pre-Inspection</td>
</tr>
<tr>
<td><strong>EXAMPLE:</strong></td>
<td><strong>Daily:</strong> Shift Tickets, Receipts (fuel issue ticket, claims, etc.)</td>
</tr>
<tr>
<td><img src="image" alt="Email Form" /></td>
<td><strong>@Demob:</strong> Contractor Evaluations, Final Shift Tickets, Receipt for addition/deductions, Post-Inspection, Final Signed Invoices, Demob Checkout sheet (ICS 221)</td>
</tr>
</tbody>
</table>

**Finance Demob Procedures**

Refer to the IAP for demob instructions.

**EXAMPLE:** All Contract Resources, Cooperators, and Casual Hires (ADs) will close-out time with Finance by physically reporting to Finance at the ICP. Turn in final times and all supporting documents to the finance email and report to Finance to close-out when you are in the DEMOB process.

All Federal Employees will be sent their **DRAFT OF-288** via the Finance email and these steps will follow:
- ✔ 24 hours provided to allow the employee time to review their DRAFT OF-288.
- ✔ A reply to Finance with the statement “good to go” or a description of any discrepancies on the OF-288 is required.
- ✔ After Finance receives the email, any discrepancies will be corrected.
- ✔ The Federal employee is sent the FINAL OF-288 for signature.
- ✔ Once signed, the FINAL OF-288 is sent back to Finance.
- ✔ Finance will sign the FINAL OF-288, email a copy to employee and the process is complete.
Batch Submission to Albuquerque Service Center (ASC)

Note* Payment batches (OF-288s and OF-286s) submitted to ASC-Incident Finance needs to have each payment package (OF-286 or OF-288, agreement or CHF, any special documentation) attached as individual documents instead of combining all payments packages in a batch into one document. One email may contain five payment packages, but each package will be an individual attachment.

Equipment Payment Packages

STEP 1
Procurement/Equipment Unit Leader, Time Unit Leader or Finance Section Chief retrieves resource file from the Ready for payment Final Audit folder in Teams Completes the audit to ensure the resource file has all of the applicable documentation; OF-286, agreement, supporting documentation for additions and deductions, shift tickets, crew time reports, crew rosters, fuel tickets, fuel logs, vendor invoices, contractor evaluations, vehicle inspections, resource order, or any other essential documentation.

STEP 2
Move the final payment package to the Procurement Batch Folder. Create a new folder in Teams that is labeled with Incident Order Number along with batch number (Batch AZ-CN000427-001). Create the batch log in Excel and complete attachment F (Emergency Equipment Use Invoice Transmittal) from the incident payment procedures.
Every batch folder will contain a maximum of 7 items, up to 5 separate payment packages, the batch log and attachment F. The final payment package consists of the OF-286, agreement, and documentation that supports additions and deductions. Any special documentation must also be included, such as; fuel logs, vendor invoices, and CTRs with hour calculations for contract crews, etc. NOTE: all documentation for national shower, caterer, and type 2 IA crews are submitted to ASC regardless of agency.

**Electronic version of Original Emergency Equipment Use Invoice (OF-286)**
- ☑️ Finance will sign the FINAL OF-286, emailed a copy to employee and the process is completed.
- ☑️ Must be signed and dated by both the Contractor/Vendor Representative and Receiving Officer.
- ☑️ Verify that all information from the shift tickets or CTRs are transferred correctly to the Use Invoice.
- ☑️ If there are any addition or deduction amounts in blocks 26 or 27, include the GSA per diem rate sheet, lodging receipts, copies of related repair orders, commissary issues, findings and determinations for claims, or any other documents supporting additions or deductions from the payment.

**I-BPA/VIPR/EERA/LUA/Commercial Agreement (Short Finance Copy Only)**
- ☑️ Signed and dated by the Contractor/Vendor and a federal Contracting Officer (copy of signature page). Ensure that the agreement is the most current version and not expired, canceled, or suspended.
- ☑️ Verify that the equipment on the Use Invoice is listed on the agreement and include appropriate rate sheets.
- ☑️ Verify Contractor/Vendor information is legible, including phone numbers and other contact
information in case there are questions.

☑ UEI/DUNS number must be included.

Casual Hire Package Submittal

STEP 1
Time Unit Leader or Finance Section Chief retrieves resource file from the Ready for payment Final Audit folder in Teams. Completes the audit to ensure the resource file has all of the applicable documentation; OF-288, crew time reports with hour calculations for contract crews, casual hire form, resource order and any supporting documentation.

STEP 2
Move the final resource file to the Time Unit Batch Folder. Batch AZ-CN-000427-001. Create the batch log in Excel and complete attachment D (Transmittal for Casuals’ Incident Time Reports) from the incident payment procedures. The final payment package consists of the OF-286, agreement, and documentation that supports additions and deductions. Any special documentation must also be included, such as; fuel logs, vendor invoices, and crew time reports with hour calculations for contract crews, etc. NOTE: all documentation for national shower, caterer, and type 2 IA crews are submitted to ASC regardless of agency.

<table>
<thead>
<tr>
<th>AD Payments ~ Batch Transmittal LIST</th>
<th>Batch Number: AZ-ASO-000123_SWA T3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Sent: 03/01/22</td>
<td>Batch sent to: email US FOREST SERVICE ASC - <a href="mailto:SM.FS.asc_ipc@usda.gov">SM.FS.asc_ipc@usda.gov</a></td>
</tr>
<tr>
<td>Resource #</td>
<td>Final Payment?</td>
</tr>
<tr>
<td>------------</td>
<td>----------------</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Electronic version of Original Emergency Equipment Use Invoice (OF-288)

☑ Need audit check list (Tony)
DOI Batch Submissions

Note: For all DOI agencies the payment packages are provided to the local unit incident business point of contact. The local unit will submit the payment packages to their associated payment center – The IMT does not submit payment packages.

Equipment Payment Packages

STEP 1
Procurement/Equipment Unit Leader, Time Unit Leader or Finance Section Chief retrieves resource file from the Ready for payment Final Audit folder in Teams Completes the audit to ensure the resource file has all of the applicable documentation; OF-286, agreement, supporting documentation for additions and deductions, shift tickets, crew time reports, crew rosters, fuel tickets, fuel logs, vendor invoices, contractor evaluations, vehicle inspections, resource order, or any other essential documentation.

3 Procurement Unit

04 Equipment_Time_Records_Claims

0 Ready_for_Payment_Final_Audit

STEP 2
Move the final payment package to the Procurement Batch Folder. Create a new folder in Teams that is labeled with Incident Order Number along with batch number (Batch AZ-CNF-000427-001). Create the batch log in Excel and complete attachment F (Emergency Equipment Use Invoice Transmittal) from the incident payment procedures.
Individual Batch folders within Payment Center Folder

Every batch folder will contain a maximum of 7 items, up to 5 separate payment packages, the batch log and attachment F. The final payment package consists of the OF-286, agreement, and documentation that supports additions and deductions. Any special documentation must also be included, such as; fuel logs, vendor invoices, and CTRs with hour calculations for contract crews, etc. NOTE: all documentation for national shower, caterer, and type 2 IA crews are submitted to ASC regardless of agency.

Electronic version of Original Emergency Equipment Use Invoice (OF-286)

- Finance will sign the FINAL OF-286, emailed a copy to employee and the process is completed.
- Must be signed and dated by both the Contractor/Vendor Representative and Receiving Officer.
- Verify that all information from the shift tickets or CTRs are transferred correctly to the Use Invoice.
- If there are any addition or deduction amounts in blocks 26 or 27, include the GSA per diem rate sheet,
lodging receipts, copies of related repair orders, commissary issues, findings and determinations for claims, or any other documents supporting additions or deductions from the payment.

**I-BPA/VIPR/EEA/LUA/Commercial Agreement (Short Finance Copy Only)**

- Signed and dated by the Contractor/Vendor and a federal Contracting Officer (copy of signature page). Ensure that the agreement is the most current version and not expired, canceled, or suspended.
- Verify that the equipment on the Use Invoice is listed on the agreement and include appropriate rate sheets.
- Verify Contractor/Vendor information is legible, including phone numbers and other contact information in case there are questions.
- UEI/DUNS number must be included.