

INTERAGENCY INCIDENT BUSINESS MANAGEMENT  
HANDBOOK

CHAPTER 40 – INCIDENT BUSINESS MANAGEMENT  
COORDINATION

Contents

40	INCIDENT BUSINESS MANAGEMENT COORDINATION
40.04	Responsibility
40.05	Definitions
41	INCIDENT AGENCY COORDINATION
42	INCIDENT MANAGEMENT TEAM (IMT) COORDINATION
43	BUYING TEAM COORDINATION
44	ADMINISTRATIVE PAYMENT TEAM (APT) COORDINATION
45	OTHER TEAM COORDINATION
46	EXHIBITS
Exhibit 01	Time Unit Incident Finance Package Guidelines
Exhibit 02	Commissary Incident Finance Package Guidelines
Exhibit 03	Compensation for Injury Incident Finance Package Guidelines
Exhibit 04	Claims Incident Finance Package Guidelines
Exhibit 05	Procurement Unit Incident Finance Package Guidelines
Exhibit 06	Cost Unit Incident Finance Package Guidelines

## CHAPTER 40 – INCIDENT BUSINESS MANAGEMENT COORDINATION

This chapter establishes guidelines for coordination responsibilities between the incident agency and the incident management team (IMT). Each agency/geographic area should supplement this chapter to meet specific needs.

### 40 – INCIDENT BUSINESS MANAGEMENT COORDINATION.

#### 40.04 – Responsibility.

Incident agency is responsible for establishing business management requirements and monitoring the quality and/or progress of incident business management throughout the incident.

40.05 – Definitions. Definitions used throughout this handbook are located in the Zero Code.

41 – INCIDENT AGENCY COORDINATION. The incident agency should prepare an IMT briefing package addressing agency requirements in advance of the incident to facilitate the exchange of information during the initial briefing. The incident agency should monitor business management activities through visits to the incident site and support sites by the Administrative Representative, Incident Business Advisor (IBA), or other fiscal/administrative individual.

Business Management Briefing Package. As part of the briefing package, the Agency Administrator should provide incident business management information and expectations to the IMT (see Operating Guidelines, Incident Business Administration in the Tool Kit). The information should contain:

1. Identification of the IBA or other agency personnel with administrative/fiscal oversight responsibilities. The IBA works under the direct supervision of the Agency Administrator and in coordination with the IMT. The primary duty of the IBA is to provide the Agency Administrator with an overview of incident management business practices, make recommendations for improvements, and facilitate communication with the IMT and other resources assigned in support of the incident. An Incident

Business Advisor Guide is available through the National Wildfire Coordinating Group (NWCG) PMS system (PMS 314).

This guide provides guidelines, responsibilities, qualifications and a checklist to assist the IBA and others in meeting the Agency Administrator's needs.

2. Names with office and home telephone numbers of incident agency contacts for each function (Compensation/Claim, Time, Commissary, Procurement, Property, and Cost). These contacts should be prepared to meet with team members to discuss agency-specific policies and procedures. Written policy and procedures should be made available to the IMT.
3. Availability of, or need for, acquisition and fiscal support (e.g., Buying Team, Administrative Payment Team) and the requirements of each.
4. Written guidelines regarding final incident package requirements and performance standards. Incident Finance Package (IFP) requirements should be provided to the IMT at the initial briefing in order that the documentation process can be established from the onset of the incident.
5. IFP guidelines can be found in Section 45, Exhibits 01-06. These guidelines should be supplemented to meet the specific needs of the incident agency. Unit logs are normally included in the final incident package by the Planning Section.
6. Recycling. The incident agency should provide direction to the IMT regarding recycling procedures.
7. Any other agency-specific issues, requirements, or information such as:
  - A. Potential claim areas.
  - B. Cooperative and/or mutual aid agreements and contacts.
  - C. Cost share criteria.
  - D. Payment procedures.
  - E. Military operations.
  - F. Use of National Guard.

- G. Service and Supply Plan.  
(See Chapter 20, Section 22).
- H. Property Management Guidelines. (See Chapter 30.)
- I. Geographic Area Supplement  
(e.g., equipment rates, AD-5 rates).
- J. Recycling (See Chapter 30, Section 37).

8. Incident Management Team Release. The Agency Administrator should consider the business management requirements of the incident when determining the release of the IMT. The Administrative Representative will coordinate a close-out session with the Finance/Administration Section, at which time the IFP will be reviewed.

9. Coordinate a debriefing and briefing session when an IMT is being replaced to ensure complete transfer of records.

42 – INCIDENT MANAGEMENT TEAM (IMT) COORDINATION.  
The Finance/Administration Section Chief (FSC) facilitates initial and continued contact with the Administrative Representative regarding agency requirements and expectations, IFP requirements, and close-out requirements.

The IMT is responsible for adequate documentation of all actions taken in relation to business management, resolving problems and issues as they occur, and providing the incident agency with an IFP that will facilitate payments, processing of claims, and resolving outstanding problems. The IFP is a separate and distinct package from the incident records maintained by the Planning Section. The IMT or incident agency may require a close-out report to be provided to the incident agency by functional area. This report usually provides summarized information by function for use by the incident agency after the IMT is released and the incident is completed.

Submission of the IFP in accordance with established guidelines is required prior to release of the IMT.

The IMT provides the Administrative Representative with a list of Finance/Administration and Logistics Section members' home unit addresses and telephone numbers.

The Finance/Administration Section attends a close-out session scheduled by the Administrative Representative to review the IFP. This meeting is in addition to the IMT close-out.

If the IMT is being released prior to the end of the incident, the relief Finance/Administration Section, the Administrative Representative, and the departing Finance/Administration Section participate in a transition briefing.

43 – BUYING TEAM COORDINATION. Buying Teams are ordered by the incident agency and report to the Agency Administrator or other designated personnel. Buying Teams work with the local administrative staff to support the incident acquisition effort.

The geographic area determines the composition of Buying Teams used internally. Each geographic area shall train and provide a minimum of one Buying Team available for national dispatch. (See National Interagency Mobilization Guide, NFES 2092)

The Buying Team leader coordinates with incident agency personnel and the IMT, ensures goods and services are purchased in accordance with incident agency policy, and maintains proper documentation. Buying Teams report the purchase of accountable property to the incident agency.

Buying Teams should not be utilized as “defacto” payment teams. Incident agencies should order an Administrative Payment Team if the incident situation warrants.

44 – ADMINISTRATIVE PAYMENT TEAM (APT) COORDINATION. APTs are ordered by the incident agency and report to the Agency Administrator or other designated personnel. APTs work with the local administrative staff to expedite incident payments. An APT should only be ordered when the length of the incident is of a long duration and the incident agency does not have the resources to timely process payments.

The APT is authorized to make payment for supplies, materials, services, equipment rental, and casualties utilized on an incident.

The APT communicates payment package, audit, and processing requirements to the FSC, Buying Team, and incident agency administrative staff.

APTs utilize a Contracting Officer for interpreting contracts and agreements while processing incident payments. If the composition of the APT does not include a Contracting Officer, the incident agency must provide one.

45 – OTHER TEAM COORDINATION. During the course of the incident, the incident agency may utilize special teams, e.g. Burned Area Emergency Rehabilitation (BAER), Prevention and Education, Cost Review, Fire and Aviation Safety (FAST), Investigation, etc. The Agency Administrator or their designee coordinates with incident management personnel to assist in meeting the objectives of the special teams. See appropriate handbook for specific team responsibilities and expectations. (For example, BAER Handbook, Prevention and Education Handbook, etc.)

46 – EXHIBITS

46 – Exhibit 01

TIME UNIT INCIDENT FINANCE PACKAGE GUIDELINES

These guidelines may be used by the incident agency to identify the Time Unit requirements for the IFP and may be amended to meet agency-specific requirements.

1. Provide a written narrative that summarizes actions and decisions of the Time Unit Leader.
2. Logs: Submit originals of all logs (e.g., excess hours log, operational period logs).
3. Provide documentation of excess hours worked and approved by the Incident Commander.
4. Emergency Firefighter Time Reports, OF-288.
  - A. Provide written documentation on outstanding items, unresolved issues, and problems. Include recommendations for resolution.

B. Casuals:

(1) Crews:

File copies are to be grouped by crew, alphabetized within the crew, and labeled with crew name.

Provide a copy of crew agreement if applicable.

If crews are to be paid locally, follow the instructions received from the incident agency or APT. A file copy will be retained in the IFP.

(2) Single Resource:

Alphabetize file copies, label as “Single Resource Casuals”.

46 – Exhibit 01 – Continued

TIME UNIT INCIDENT FINANCE PACKAGE GUIDELINES

If single resource casualties are to be paid locally, follow instructions from the APT. A file copy will need to be retained in the IFP.

If single resource casualties have been hired on the incident, submit originals of the I-9, W-4, W-5, and state tax forms, and OF-288, and Single Resource Casual Hire Form to the APT.

C. Regular Government Employees and Cooperators:

(1) Crews:

File copies are to be grouped by crew, alphabetized within the crew, and labeled appropriately.

(2) Single Resource:

Alphabetize file copies and label appropriately.

5. Crew Time Reports, SF-261:

A. Crews: File copies are to be grouped by crew, alphabetized within the crew, and labeled appropriately. May attach to OF-288.

B. Single Resource: Alphabetize file copies and label appropriately. May attach to OF-288.

46 – Exhibit 02

COMMISSARY INCIDENT FINANCE PACKAGE GUIDELINES

These guidelines may be used by the incident agency to identify the Commissary requirements for the IFP and may be amended to meet agency-specific requirements.

1. Provide a narrative that documents decisions and actions of the Commissary Manager.
2. Provide written documentation on outstanding items, unresolved issues, and problems. Include recommendations for resolution.
3. Agency-Provided Commissary:
  - A. File the original Commissary Accountability Record, OF-284; receipts for purchases, transfer documents (waybill), and returns/credits; the original Commissary Issue Records, OF-287; written inventory; and other pertinent documentation by date/operational period.
  - B. All discrepancies (plus or minus) must be documented in writing (notation in the remarks column of the Commissary Accountability Record, OF-284, is sufficient).
  - C. Discrepancies, due to missing items, must be accounted for according to incident agency procedures.
  - D. Deliver remaining commissary stock to the incident agency (obtain signature on final Commissary Accountability Record in Blocks 15-17 to document transfer).

46 – Exhibit 02 – Continued

COMMISSARY INCIDENT FINANCE PACKAGE GUIDELINES

4. Contractor-Provided Commissary:
  - A. Refer to the national contract for documentation requirements. File vendor invoices and supporting documentation, including commissary issue copies with posting verification, by date/operational period. Include a copy of the commissary operating plan. Complete all required invoices (National Mobile Commissary Services Payment Invoice, NFES 2600) and payment documents according to the terms of the contract.
  - B. Provide written evaluation of contractor's performance as stated in the contract.

46 – Exhibit 03

COMPENSATION FOR INJURY INCIDENT FINANCE PACKAGE  
GUIDELINES

These guidelines may be used by the incident agency to identify the Compensation for Injury requirements for the IFP and may be amended to meet agency-specific requirements.

1. Provide written narrative that documents actions and decisions of the Injury Compensation Specialist or Compensation Claims Unit Leader.
2. Provide written documentation on all outstanding items, unresolved issues, problems, etc. Include recommendations for resolution.
3. Injury Compensation Documents.
  - A. Submit original Injury Compensation and Medical Resource Order/Requisition (M#) Logs.
  - B. Utilize the Incident Injury Case File Envelope. File alphabetically into two groups.
    - (1) Completed. No action needed.
    - (2) Outstanding. Incomplete forms, missing forms, or person hospitalized.
  - C. Provide copies of all injury paperwork (CA-1, CA-2, CA-16, FS 6100-16, state forms, medical reports, etc.) for each individual and attach to their time report. All original reporting forms and supporting documentation are sent to the home unit. The incident agency will determine the process for submitting to home unit. Copies of all forms and documentation will be included in the IFP.

46 – Exhibit 04

CLAIMS INCIDENT FINANCE PACKAGE GUIDELINES

These guidelines may be used by the incident agency to identify the Claims requirements for the IFP and may be amended to meet agency-specific requirements. (Contract claim information is in Chapter 20, Section 26.6.)

1. Provide written narrative that documents actions and decisions of the Claims Specialist or Compensation/Claims Unit Leader.
2. Provide written documentation on all outstanding items, unresolved issues, problems, etc. Include recommendations for resolution.
3. Claim Documents.
  - A. Submit original Claims Log.
  - B. Personal Property Loss/Damage Claims: Utilize the Incident Claims Case File Envelope. Provide original documentation including written claim, supervisor statement, investigation report, etc. Include incident recommendations as appropriate.
  - C. Potential Claims: Utilize the Incident Claims Case File Envelope. Provide documentation (pictures, statements, written reports, maps, etc.) on all potential claims. Include incident recommendations as appropriate.

46 – Exhibit 05

PROCUREMENT UNIT INCIDENT FINANCE PACKAGE  
GUIDELINES

The incident agency may add to the following guidelines with agency specific requirements.

1. Provide written narrative that documents actions and decisions of the Procurement Unit Leader, Contracting Officer, and/or Procurement Officer.
2. Submit original equipment logs (Equipment hired, Equipment Vendor Deduction, etc.).
3. Equipment Files - Utilize the Emergency Equipment Rental-Use Envelope, OF-305; file alphabetically into two groups: Ready for payment and follow-up required. Identify follow-up needed and provide recommendations for solutions. Identify partial payments made on the equipment envelope. Individual Emergency Equipment Rental-Use envelopes shall include:
  - A. Emergency Equipment Rental Agreement, OF-294.
  - B. Vehicle/Heavy Equipment Checklist (Pre- and Post-use Inspections), OF-296.
  - C. Emergency Equipment Shift Tickets, OF-297 (in chronological order).
  - D. Emergency Equipment Use Invoice, OF-286, completed and signed.
  - E. Emergency Equipment Fuel and Oil Issues, OF-304.
  - F. Resource Order.
  - G. Commissary Issue Records, OF-287.

46 – Exhibit 05 – Continued

PROCUREMENT UNIT INCIDENT FINANCE PACKAGE  
GUIDELINES

- H. Contracted Commissary Issue Record, NFES 2180.
- I. Other deduction/credit documentation, (e.g., APMC records/invoices, agency-provided repair/parts invoices).
- J. Documentation of existing or potential contract claims.
- K. Emergency Firefighter Time Report, OF-288 if operator hired as a casual.
- L. Performance Evaluation.
- M. Follow-up required.

Original documentation is submitted to the payment office per contract/agreement terms. Retain a complete copy of all documentation for the IFP.

- 4. Provide documentation of all Land-Use or other agreements that have been entered into by the IMT. Documentation shall include:
  - A. Original agreement.
  - B. Pre-use and final inspection.
  - C. Release from Liability, if applicable.
  - D. Pictures, statements, etc.
  - E. Identify follow-up needed and provide recommendation for resolution.
- 5. Provide documentation of all purchases made by the incident personnel (e.g., agency charge card or convenience check purchases).

46 – Exhibit 06

COST UNIT INCIDENT FINANCE PACKAGE GUIDELINES

These guidelines may be used by the incident agency to identify the Cost Unit requirements for the IFP and may be amended to meet agency-specific requirements.

1. Provide written narrative that documents actions and decisions of the Cost Unit Leader.
2. Provide written documentation on all outstanding items, unresolved issues, problems, etc. Include recommendations for resolution.
3. Submit original Cost Log showing daily cost estimate by major categories (Personnel, Equipment, Aircraft, etc.).
4. Submit original Daily Cost Estimates with supporting documentation. Sort chronologically.
5. Originals of cost analysis/projections.
6. Include any other documentation including computer-generated reports, graphs, and printouts.
7. Provide copies of cost-share agreements.