

May 18, 2005

**MEMORANDUM**

TO: Hallie Locklear, Chair, Incident Business Practices Working Team

FROM: Kermit Johnson, Group Leader, EERA Forms Task Group /s/ *Paul V. Palmiotto for*

SUBJECT: Final Report

The EERA Forms Task Group was chartered by the IBPWT in the summer of 2004 for the following purpose, scope and deliverables:

**MEMBERS:** Kermit Johnson, BLM, Group Leader  
Susan Beron, FS  
Deanne Huff, BLM  
Leeann Evans, FS  
Linda Berckefeldt, State of Wyoming  
Diana Champion, FS  
Paul V. Palmiotto, IBPWT Liaison

**PURPOSE:** The purpose is to utilize only those forms that are necessary to track and process payments for EERA's, and ensure they are designed and reproducible in a manner that makes their completion and use efficient and effective.

**SCOPE:** To review, evaluate and revise of the following EERA forms and business processes contained in Chapter 20 of the Incident Business Management Handbook:

1. OF-286 – Emergency Equipment Use Invoice
2. OF-294 – Emergency Equipment Rental Agreement
3. OF-296 – Vehicle/Heavy Equipment Inspection Checklist
4. OF-297 – Emergency Equipment Shift Ticket
5. OF-304 – Emergency Equipment Fuel and Oil Issue
6. OF-305 – Emergency Equipment Rental Use Envelope

This task will be limited to the review of the current business processes and forms that are in place to process EERA payments.

**DELIVERABLES:**

1. Progress reports to IBPWT, August 20, 2004 and January 1, 2005.
2. Draft report to IBPWT by February 15, 2005.
3. Final report submitted to IBPWT by March 15, 2005. Final report will include:

- Recommendations for changes to current EERA forms
- Recommendations for redesign of existing forms
- Recommendations for changes to business practices as a result of changing forms
- Documentation based on the review and analysis

The EERA Forms Task Group has met via conference calls and communicated e-mails to conduct the work of the Task Group. Conference calls took place on 9/17, 10/27, 11/30, 12/9, and 1/5/05. No expense costs have occurred to date.

The EERA Forms Task Group went through a very methodical review of each of the EERA forms. Diana Champion did an outstanding job of converting the paper forms into Excel spreadsheets that greatly facilitated our review and changes to each form. All the forms were revised and updated to improve their use, efficiency and processing.

Over the holidays, Kermit Johnson was injured and could not participate on the January 5, 2005 conference call, however; Paul Palmiotto facilitated the call in order to finish the review of the forms.

The EERA Forms Task Group felt that the review of the Vehicle/Heavy Equipment Inspection form was outside their area of expertise and wanted to send the form through the logistics community. A subject matter expert (SME) was solicited via the Chair of the FEWT. Richard (Rich) Rusk, FS was suggested. Rich is the chair of a new subcommittee on logistics. He joined the conference call in January and prior to the meeting, sent the revised draft forms to some contacts in the logistics community. Their feedback was incorporated into the discussions and revisions at the January 5, 2005. Rich agreed to bring the draft forms before the National Logistics Workshop in March for comment.

The progress of the EERA Forms Task Group at the IBPWT meeting January 19-20, 2005 in San Diego. The forms were reviewed and discussed at the meeting. The IBPWT stated the draft forms looked good and functional. A few minor suggestions were made to a couple of the forms. These changes were made on the forms and sent back out to the EERA Forms Task Group. Randy Hart agreed to attend the National Logistics Workshop and answer questions regarding the form revisions. A member or two of the EERA Forms Task Group will also be attending the National Logistics Workshop and will be available to answer questions. Maryann Szymoniak stated that the proposed revisions would not be able to be incorporated into I-Suite this year. Since the forms need to go out as test forms during the upcoming fire season, this will not be a problem.

Following the National Logistics Workshop e-mail correspondence was received from Richard Rusk, Fire Prevention Officer on the Uinta and W-C National Forests/Region 4 regarding the review of the Heavy/Equipment Inspection Checklist (See attached e-mail of April 8, 2005). The feedback from the logistics community on the proposed new inspection form was basically that it is not needed.

At the May 2005 meeting of the Incident Business Practices Working Team the inclusion of a Privacy Act statement on various incident timekeeping documents was discussed. As a result of the discussions, it was decided that vendor TIN, EIN and Social Security information would be covered under the Privacy Act and therefore, a statement should be included on the EERA and Equipment Use Invoice. These forms have been modified to include the Privacy Statement and are attached with this report.

#### **RECOMMENDATIONS:**

- 1. The EERA Forms Task Group will review and consider the comments regarding the forms changes brought up at the National Logistics Workshop.**
- 2. EERA forms will be finalized and transmitted along with the final EERA Forms Task Group report to the IBPWT.**
- 3. The forms should be placed on the IBPWT website for use as test forms to use during this fire season.**
- 4. Correspondence out to the incident business community should be made prior to the fire season advising everyone the forms are available for use.**
- 5. Revisions will need to be made to the Incident Business Management Handbook in Chapter 20 following the fire season.**
- 6. Revisions need to be made to I-Suite incorporating the forms changes.**

Conference call notes and revised EERA forms are attached to this report. Should you have any questions or need additional information, please contact me.

Attachments: Conference call notes – September 17, 2004  
Conference call notes – October 27, 2004  
Conference call notes – January 5, 2005  
E-mail correspondence – April 8, 2005  
EERA forms in the electronic format (Excel spreadsheets)

Report submitted by Paul V. Palmiotto, Task Group Liaison on behalf of Kermit Johnson