IQCS CHANGE MANAGEMENT BOARD MEETING
April 15 & 16, 2008
Chief Joseph Room BLM State Office
Boise, Idaho

ATTENDEES:

Sharon Allen-Brick – USFS	John Noneman – BLM OF&A IRM	Rick Jensen – BLM
Craig Cook – BIA	Mark Koontz –NPS& USFWS	Mike Morgen – IQCS
Guy Coldwell – IQCS	Aitor Bidaburu – BLM	Carmen Thomas – BLM
Cindy Schafer--IQCS	Janis Reimers – BLM OF&A IRM	Nancy Delong – ROSS

DECISION SUMMARY

➔ **Decision: All positions in the Technical Specialist Category will continue to be given either a five year or three year currency requirement.**

➔ **Decision: Subject Matter Experts representing technical specialist positions may request the establishment of currency requirements other than the default five or three years.**

➔ **Decision: The board agreed to establish the ability to designate position prerequisites that cannot be overridden and to add this functionality at the role table where the specific position requirements are held.**

➔ **Decision: Board agreed to pursue modifying the system to allow effective dating of individual competencies i.e., position requirements on the role table. This functionality will help facilitate updating position requirements when changes are mandated by the 310-1 and 5109-17.**

➔ **Decision: The board agreed to institute the ability of the system to recalculate expiring competencies when different rules apply when a responder is transferred to a new agency. For example if one agency says a refresher is good for only two years and the other three years on transfer the system will look at the specific agency rules and make the adjustment to the effected expiring competency and adjust the expire date.**

➔ **Decision: The Board at this time will not institute changes to the system to facilitate the business rule change that would not require refresher training for USFS employees who are in Trainee status. This decision was made in consultation with the USFS. Questions arising will be directed to USFS representative to the IQCS CMB.**

➔ **Decision: The Forest Service has directed IQCS help desk to advise that for HELM , trainees must complete RT-372 refresher. For HRSP trainees account managers can manually award the refresher competency to maintain qualified status.**

➔ **Decision: The Board agreed that BLM IRM, should continue to look for methods to extend the contractor programming support until June 27, 2008 to help manage the ROSS/IQCS interface.**

➔ **Decision: The Board agreed there is no need to capture the rate at which an AD employee may be employed since it may not be accurate since the rate could easily vary depending on what position hired to perform.**

➔ **Decision: The board agreed to reprogram the system to check at the task book certification page to ensure that all required training has been met before the task book can be certified and position competency awarded**

➔ **Decision: Create new form and instructions on How to Deactivate a Position.**

➔ **Decision: Mark Koontz, will be the new lead for this ROSS/IQCS experience interface.**

➔ **Decision: The next IQCS CMB Meeting is scheduled for October 7 – 8, 2008.**

ACTION ITEMS

➔ **Action Item No. 199: Update the code at the competency assignment table to bring forward the date that the technical specialist is awarded in order for the system to establish it as the date to begin calculating currency.**
   Lead: Guy Colwell
   Target Completion Date: May 1, 2008

➔ **Action Item No. 200: Provide a list of Technical Specialist positions including the frequency and length of currency so all control tables for those positions can be updated.**
   Lead: Michael Morgen
   Target Completion Date: May 1, 2008

➔ **Action Item No. 201: Update existing records for technical specialist by systematically establishing a currency expire date for those technical specialist responder that currently do not have a criteria date set. Ensure that for those that will expire when new criteria date is established that we provide at least 5 years or 3 until currency is due.**
   Lead: Guy Colwell
   Target Completion Date: May 1, 2008

➔ **Action Item No. 202: Modify code to allow individual competencies to be set so the cannot be overridden at the competency role table**
   Lead: Guy Colwell
   Target Completion Date: May 1, 2008

➔ **Action Item No. 203: Modify code to allow the application of the verify date to individual competencies at the role table**
   Lead: Guy Colwell
   Target Completion Date: May 1, 2008

➔ **Action Item No. 204: Provide a list of responders by agency that do not have clearing house ID.**
   Lead: Cindy Schafer
   Target Completion Date: May 1, 2008

➔ **Action Item No. 205: Reprogram Position Task book Page to ensure all required training has been completed prior to certification of task book**
   Lead: Guy Colwell
   Target Completion Date: May 1, 2008

➔ **Action Item No. 206: Research possible solutions to new rule regarding who can be a task book evaluator and bring proposal to board. Consider interim and permanent solutions.**
   Lead: Michael Morgen
   Target Completion Date: May 30, 2008

➔ **Action Item No. 207: Keep add a position code document Create new How to Deactivate a Position document, create forms for both, post to the IQCS web site.**
   Lead: Michael Morgen
   Target Completion Date: October 7, 2008

➔ **Action Item No. 208: Communicate with Geo Spacial Group to request decision regarding the specific date to deactivate and sweep the GIST position code from IQCS.**
   Lead: Michael Morgen
   Target Completion Date: May 30, 2008

➔ **Action Item No. 209: Redesign Add a Course form**
   Lead: Michael Morgen
   Target Completion Date: May 30, 2008

➔ **Action Item No. 210: Reprogram field and page so when Empl Kind is selected as Casual auto fill salary plan to AD and grey out Rate field..**
   Lead: Guy Colwell
   Target Completion Date: May 1, 2008

➔ **Action Item No 211: IQCS sends letter to PMO requesting direction for the HR target architecture for replacement solution for IQCS**
   Lead: John Noneman/Craig Cook
   Target Completion Date: May 15, 2008

MEETING DATES SUMMARY
   • IQCS Change Management Board Meeting, April 15 -16, 2008

EXHIBITS ATTACHED
A.   Agenda

MEETING CONTENT:
Meeting started at 8:30 a.m. Agenda (Exhibit A) distributed.

A.   **CPIC review from John Noneman, Project Manager**

➔ **Action Item No 211: IQCS send letter to PMO requesting direction for the HR target architecture for replacement solution for IQCS**
   Lead: John Noneman/Craig Cook
   Target Completion Date: May 15, 2008

1.   Currency Application on Technical Specialist Positions

Issue: When calculating currency, IQCS has set rules to apply for regular positions which have an established Frequency and Length. But for other positions like Tech Specialists, which have no

Frequency and Length, the system does not always know how to handle this. Scenario: Initially we established 5 and 3 year currency requirements for these positions applying the logic established by the 310-1 for the primary fire management positions. Examining our control tables we have discovered several tech specialist positions which were missing currency rules.

Discussion: The board discussed the two primary options. Option one was to consider making technical specialist position not subject to any currency rules. Option two apply the 5year or 3 year following the guidance provided by the 310-1 for operations, aviation, and dispatch positions, and also rely on the proposals from Subject Matter Expert groups directing deviation from these time frames.

➔ **Decision: All positions in the Technical Specialist Category will continue to be given either a five year or three year currency requirement.**

➔**Decision: Subject Matter Experts representing technical specialist positions may request the establishment of currency requirements other than the default five or three years.**

> ➔ **Action Item No. 199: Update the code at the competency assignment table to bring forward the date that the technical specialist is awarded in order for the system to establish it as the date to begin calculating currency.**
> **Lead: Guy Colwell**
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> **Lead: Guy Colwell**
> **Target Completion Date: May 1, 2008**

2.   <u>Prerequisites that can not be overridden</u>

Issue: Some prerequisites for Positions can not be overridden. Example: Pack Test and Refresher. We need to modify the system to be able to identify those prerequisites that can not be overridden – rather than hardcode them (current design).

Discussion Currently, Fitness and Refresher are hard-coded by virtue of their competency category, so they can not be overridden. If we add the ability to the system to identify any prerequisite competency that can not be overridden, then change the Qualification Process to take this into consideration, this gets rid of the hardcode (good thing), and also gives us the ability to identify prerequisites that really should not be overridden. Example: IS700 and IS800 for the Forest Service currently, or other mandated prerequisites in the future. Essentially, this gives the system greater flexibility in the future.

➔ **Decision: The board agreed to establish the ability to designate position prerequisites that cannot be overridden and to add this functionality at the role table where the specific position requirements are held.**

➔ **Decision: The board agreed to modify the system to allow the application of the verify date to individual competencies at the role table. In the past the verify date could only be applied at the role level leading to complexities when updating the roles when criteria changes.**

➔ **Action Item No. 202: Modify code to allow individual competencies to be set so the cannot be overridden at the competency role table**
Lead: Guy Colwell
Target Completion Date: May 1, 2008

➔ **Action Item No. 203: Modify code to allow the application of the verify date to individual competencies at the role table**
Lead: Guy Colwell
Target Completion Date: May 1, 2008

3. **Potential Business Rule Change regarding whether a trainee has to complete refresher training requirement.**

Issue: Currently when a course is required for a position and that course has an associated refresher component both are added to the requirements for the position. When a responder initially completes the required training they are also awarded the competency for the associated refresher training and the system begins to calculate when the next refresher is due per the frequency set for the refresher. Since both the required course and refresher are in the category "required" we currently do not apply two separate criteria based on a person's position qualification status. The refresher requirement as well as the required training is applied to the trainee as well as the fully qualified responder. The Forest Service is considering making a rule change that would not require Trainees to stay current on identified refreshers in order to be considered a "qualified" Trainee. This is a major departure from the way the refresher requirement is set in the IQCS. There may be adjustments to this logic when the new 310-1 is approved if there are adjustments to the when a responder has to complete required training.

Discussion: The Forest Service Representative directed the IQCS to wait to see how this requirement evolves before instituting modifications to the system to handle the rule change.

➔ **Decision: The board will defer actions on this issue until further direction is obtained.**

The Forest Service provided direction to IQCS to advise FS users that the refresher requirement RT-372 is still required to be considered a "qualified" HELM (t) and must be obtained by successfully attending the course RT-372. For the position HRSP the USFS authorized their account managers to manually award the refresher training competency RT-341 to trainees in order to maintain their "qualified" trainee status.

4. **IQCS-Re-hosting Charter Plan**

Issue: IQCS is planning to move hardware from the current hosting site NITC in Kansas City, MO to NIFC

Discussion: The IQCS staff is planning to move the system to NIFC. Hosting the IQCS at NIFC will provide the benefit of having the system available to the support staff, ensure access availability to staff to complete Certification & Accreditation requirements, reduce hosting costs and the move fit in with the NIFC/NIRM COOP.

5. **Programming Help for to support IQCS/ROSS interface**

Issue: As we approach the busy red card season the IQCS staff and BLM IRM anticipate needing the services on an additional contract programmer to assist with managing the IQCS/ROSS interface. BLM IRM will be searching for funding sources to maintain current programming level through June 27, 2008.

Discussion:
Decision: The board agreed that it is a good idea to pursue funding to extend the programmers contract through June 27, 2008

6. **IQCS/ROSS Interface Update**

Issue: Information sharing

Discussion: Cindy Schafer briefed the board regarding the process for those folks who have not made it through the clearing house and consequently have not been updated in the ROSS application. Responders lacking required data in IQCS during the initial load of IQCS responders to ROSS where not able to be uploaded to ROSS. Cindy has spread sheets for each agency displaying responders that are missing clearing house numbers and indicating gaps in the data that prevent them from being sent to the clearing house and ultimately to ROSS. Once data is entered or corrected for effected responders they can be issued a clearing house number. One common obstacle to getting the clearing house number however occurs when a record for a responder already exist in ROSS in those cases it requires the intervention of the ROSS data steward to assess the two records and take actions that allow the new record to come through to establish the real time link with ROSS.

➔ **Action Item No. 204: Provide list of responders by agency that do not have clearing house ID**
   Lead: Cindy Schafer
   Target Completion Date: May 1, 2008

7. **Briefing from IOWST regarding upcoming 310-1 update**

Issue: The Incident Operations Standards Working Team has recently updated all the Position Task Books to better align with the National Incident Management System (NIMS). This work has prompted a revision of the 310-1.

Discussion: One major change proposed for the 310-1 would allow responders to get Position Task Books initiated prior to completion of the required training. The required training would however have to be completed in order to become fully qualified. For IQCS not requiring the training prior to task book initiation can be modified as the system is currently designed to allow for this. In fact we already do this for the exceptions such as the positions that require S420, S520 or S620. Guy Colwell pointed out that when we make this change it would allow someone to certify the task book which awards the position competency.

The board discussed another proposal for the updated 310-1 which concerns who is qualified to be an evaluator for task books. In the past it said the evaluator must be qualified in the position they are evaluating, the proposed change directs that an evaluator except for the final evaluator may be qualified in a position that supervises the position that is being evaluated. Currently IQCS does not have a way to

accomplish this new rule change. Complicating this requirement is the fact that there are different standards for two types of evaluators.

The 310-1 target implementation date is May 30, 2008. The IQCS will need to be modified to reflect those changes. IQCS board members may be needed to assist the IQCS staff in updating the control tables.

➔ **Decision: The board agreed to reprogram the system to check at the task book certification page to ensure that all required training has been met before the task book can be certified and position competency awarded.**

   ➔ **Action Item No. 205: Reprogram Position Task book Page to ensure all required training has been completed prior to certification of task book**
      Lead: Guy Colwell
      Target Completion Date: May 1, 2008

   ➔ **Action Item No. 206: Research possible solutions to new rule regarding who can be a task book evaluator and bring proposal to board. Consider interim and permanent solutions.**
      Lead: Michael Morgen
      Target Completion Date: May 30, 2008

8.   Identify process for Deactivating IQCS positions

Issue: We have deactivated positions in the past. We would like to develop a more formalized process that we can use as a template to ensure that the cleanest transition is accomplished. Now that we have an interface with ROSS the need for a coordinated deactivation process is needed.

Discussion: The Board discussed Michael Morgen's proposal to start with modifying How to add a Position form and instructions. The board thought that was a good idea but agreed that it should be done as separate document as opposed to combining the documents to provide clarity. The board felt this is a needred effort and will help when assisting user groups with development of effective transition plans. Specifically we discussed some of the lessons learned from the proposed deactivation of GIST and the transition to GISS. In this case the subject matter experts proposed that the transition from the deactivated position to the new position be handled manually by the individual account. manager. The plan resulted in some confusion both at the local unit and dispatching areas. Consequently we still have responders showing GIST on their red card screens and we are not sure when to clean this record out.

➔ **Decision: Create new form and instructions on HOW to Deactivate a Position**

   ➔ **Action Item No. 207: Keep add a position code document Create new How to Deactivate a Position document, create forms for both, post to the IQCS web site.**
      Lead: Michael Morgen
      Target Completion Date: October 7, 2008

   ➔ **Action Item No. 208: Communicate with Geo Spacial Group to request decision regarding the specific date to deactivate and sweep the GIST position code from IQCS.**
      Lead: Michael Morgen
      Target Completion Date: May 30, 2008

9.   How to Add a Course

Issue: The Add a Course form is not always being properly filled out.

1. **Discussion:** Michael Morgen presented the Add a Course form and explained some of the problems areas experienced when folks have filled the form out. The board identified modifications to the form that would make it more user friendly and help ensure it gets filled out properly.

  ➔ **Action Item No. 209: Redesign Add a Course form**
     Lead: Michael Morgen
     Target Completion Date: May 30, 2008

10.   AD Rates at the Job Code Table

Issue: Since the AD rates changed from numeric to letter codes the rate at the job code table no longer makes sense.

Discussion: Since ADs are often qualified for multiply positions which represent different rates even if the rate table was modified to handle letter codes the information would not necessarily be accurate.

➔ **Decision: Board agrees IQCS should not hold the rates for ADs.**

  ➔ **Action Item No. 210: Reprogram field and page so when Empl Kind is selected as Casual auto fill salary plan to AD and grey out Rate field..**
     Lead: Guy Colwell
     Target Completion Date: May 1, 2008

11.   Request to add indicator showing date Agency Audit was completed added to Master record report.
Discussion: This process has a lot of variables. This was a Forest Service request therefore Sharon Allen Brick volunteered to contact the person requesting the change and explain the process.

➔ **Decision: No action from the board, agency representative will contact the individual requesting change.**

12.   New Bug functionality demonstrated
Issue: None

Discussion: Michael Morgen demonstrated the bug ticket functionality: new features include when ticket is reassigned the system can automatically generate an email to the recipient which includes a hyperlink that will take the person directly to the bug.

  ➔

13.   Update regarding the project receiving experience records from ROSS

Discussion: Rick Jensen provided the update. At a recent conference call the group tasks with overseeing this project reviewed the survey information received from both ROSS and IQCS users. The group agreed that the ability to receive experience records from ROSS would be a beneficial function. The next step will evolve getting cost estimates from both ROSS and IQCS technical staff for consideration by NWCG.

➔ **Decision: Mark Koontz, will be the new lead for this ROSS/IQCS experience project**

14.   <u>**Next IQCS CMB Meeting**</u>

➔ **Decision: The next IQCS CMB Meeting is scheduled for October 7-8, 2008.**

IQCS
Change Management Board
Agenda

April 15 16 2008

NIFC Old Administration Building
Workshop #1 Basement

☐	**Roll Call**	
	Agency Leads **IQCS Staff** ☐ BLM　　Rick Jensen　　☐ Mike Morgen ☐ BIA　　Craig Cook　　☐ Cindy Schafer ☐ NPS　　Mark Koontz　　☐ Guy Colwell ☐ USFS　　Sharon Allen-Brick　　☐ Doug Freeman ☐ FWS　　Kevin Conn ☐ BLM　　Aitor Bidaburu　　**BLM OF&A IRM** **Guests;**　　☐ John Gebhard ☐ ROSS Nancy Delong　　☐ Janis Reimers ☐ BLM Carmen Thomas　　☐ Greg Jensen	
☐	**Agenda Items**	
1	☐ : **Currency Application on Technical Specialist Positions** See page(s) 4,5 19-26	**Guy Colwell**
2	☐ **Prerequisites that can not be overridden** See page(s) 6	**Guy Colwell**
3	☐ **Position Specific Refresher Training and how it's applied to responders with active Task books** **Discussion/Decision** See page(s) 7 and 28	*Guy Colwell*
4	☐ **IQCS Re-hosting Charter/Plan** **Information Handout** See page(s) 8	*Michael Morgen*
5	**Programming Help needed to support IQCS/ROSS interfac** **Discussion Decision** See page(s) 17	*Cindy Schafer*
6	**IQCS/ROSS Interface Update** **Information** See page(s) 18	*Cindy Schafer*
7	☐ **Vince Mazzier** **310-1 update associated Impact** **Information Discussion** See page(s) 9	*Vince Mazzier*
8	☐ **Identify process to deactivate positions in IQCS** **GIST to GISS lessons Learned**	*Michael Morgen*

	Discussion /Decision See page(s) 10	
9	**How to add a course discussion** **(Handout)** **Discussion/ Decision** See page(s) 11	*Michael Morgen*
10	**AD Rates values on the Job Data Page** **Discussion/Decision** See page(s) 12	*Michael Morgen*
11	**Help Request wanting Agency audit completion and date to show on Master Record** **Discussion decision 8844 Bug** See page(s) 13,14	*Michael Morgen*
13	**New Bug Ticket functionality** **Information/Demonstration** See page(s) 15	*Michael Morgen*

14	**Update on receiving experience records from ROSS** **Information Discussion** See page(s) 19	*Rick Jensen*
15	**Round Robin**	**Team**
	☐ BLM	
	☐ BIA	
	☐ NPS	
	☐ USFS	
	☐ FWS	
	☐ OF&A	
	☐ IQCS Project Manager	
	☐ Mike Morgen	
	☐ John Gebhard	
	☐ Janis Reimers	
	☐ Cindy Schafer	
	☐ Guy Colwell	

☐ Doug Freeman	
☐ Guest; Nancy Delong	
☐ Guest	
☐ Guest	
☐ **Close out**	