



## IQCS User Guide

# MODULE 5: QUALIFICATIONS MANAGEMENT

### OVERVIEW

Welcome to the Managing Competencies module. In this module, we will discuss how you can manage responders' competencies within the Incident Qualifications and Certification System (IQCS). This includes the Competencies, Experience, Position Task Book, Responder Training, Licenses and Certificates, and Trouble Shooting pages.

A responder's competencies record could be considered their qualification control table. IQCS compares the responder's competencies to the business requirements implemented in the Role Table to determine if a responder is qualified for a position. Competencies are added to a responder's record automatically when most other additions are made: when training is added to the training record, when a task book is added or certified, when a licenses/certificate is added to the licenses and certificates page. When experience is added to the experience record, the Expiration Date is updated on the Incident Qualifications page.

IQCS users are not allowed to enter, edit or remove their own data on any pages, with the exception of experience records, in the IQCS application.

### NEW June 2019

- Added Delete History tabs and functionality to Responder Training, Licenses and Certifications and Competencies pages.
- Added view only to session managed training records on the Responder Training page. Added programming displaying competencies awarded from source pages (Responder Training, Licenses and Certificates and Position Task Book pages) as view only.
- Minor updates to grammar and formatting

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## COMPETENCY MANAGEMENT

### USE OF COMPETENCIES IN IQCS

IQCS uses competencies to document the attainment of position qualification requirements. When the Show Qual Card Details, or Run Qual Process, button is clicked on the Incident Qual Card page the online qualification process is ran. During this process IQCS checks the requirements of the position against the responder's Competencies record to see if they meet the requirements for each position they have on their Incident Qual Card page.

In the example below, there are eight active required competencies for ICT4 qualification (per the [PMS 310-1: NIMS Wildland Fire Qualification System Guide](#)) that a responder has on their Incident Qual Card page. The competency record for the responder shows she has attained 16 competencies in her record. The application will compare the requirement of the NWCG0 ICT4 control table to the responder's competency control table and identify a qualification status for the position on the responder Incident Qual Card page.

Role Competencies | Taskbook Prereqs | Role Description | Position Checklist URL | Track Changes

Set ID: NWCG0 Position: ICT4 Incident Commander Type 4 Department:

Competency Profiles Find | View All First 1 of 1 Last

Effective Date: 09/29/2012 Position Checklist

Assigned Competencies Personalize | Find | View 6 | First 1-9 of 9 Last

Competency	Description	Proficiency	Reqd for Trainee Status	No Override	Apply Retro	Status as of Effective Date
FITCAT	Fitness Category	A	Arduous	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
ICS-100	Introduction to ICS (ICS-100)	1	Attained	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active
ICS-200	Basic ICS (ICS-200)	1	Attained	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active
ICT4CPX	ICT4 Complex Position Prereq	1	Attained	<input type="checkbox"/>	<input type="checkbox"/>	Active
ICT4TB	Incident Commander Type 4 PTB	2	Certified	<input type="checkbox"/>	<input type="checkbox"/>	Active
IS-700	NIMS An Introduction	1	Attained	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active
RT-130	Fire Safety Refresher	1	Attained	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
S-200	Initial Attack Incident Cmdr	1	Attained	<input type="checkbox"/>	<input type="checkbox"/>	Active
S-215	Fire Ops Urban Interface	1	Attained	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Inactive

Competencies | Manually Award Comps | Delete History

Supervisor, Sally S Empl ID: 0000000324 CH ID: 329311

Competency Evaluation Find | View All First 1 of 1 Last

Evaluation ID/Type: 01 Approved

Assigned Competencies Personalize | Find | View All | First 1-16 of 16 Last

Competency	Description	Effective Date	*Proficiency	Expiration Date	Justification
DFPFMCPX	DFPFM Complex Position Prereq	06/26/2019	Attained		
FITCAT	Fitness Category	06/26/2019	Arduous	06/26/2020	Justification
IC4/3CPX	ICT4/3 Complex Position Prereq	06/26/2019	Attained		
IC5/4CPX	ICT5/4 Complex Position Prereq	06/26/2019	Attained		
ICS-300	Intermediate ICS	06/26/2019	Attained		Justification
ICS-400	Advanced ICS	06/24/2019	Attained		Justification
ICT4	Incident Command Type 4	06/26/2019	Attained		Justification
ICT4CPX	ICT4 Complex Position Prereq	06/26/2019	Attained		Justification
IS-700	NIMS An Introduction	06/21/2019	Attained		Justification
RT-130	Annual Fire Safety Refresher	06/17/2019	Attained	06/17/2020	

## COMPETENCIES

A responder's competency record serves as the historical record for all competencies that a responder has achieved.

IQCS compares the competencies in a responder's competency record to the business requirements to ensure that the responder is qualified for the position. The agency position guides are implemented in an IQCS Control Table on the Setup Roles component.

Competencies	Manually Award Comps	Delete History
--------------	----------------------	----------------

Supervisor, Sally S	Empl ID: 00000000324 CH ID: 329311
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Competency Evaluation						Find   View All	First	1 of 1	Last
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Evaluation ID/Type:	01 Approved
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Assigned Competencies			Personalize	Find	View All	First	1-16 of 16	Last
Competency	Description	Effective Date	*Proficiency	Expiration Date	Justification			
DFPFMCPX	DFPFM Complex Position Prereq	06/26/2019	Attained					
FITCAT	Fitness Category	06/26/2019	Arduous	06/26/2020	Justification			
IC4/3CPX	ICT4/3 Complex Position Prereq	06/26/2019	Attained					
IC5/4CPX	ICT5/4 Complex Position Prereq	06/26/2019	Attained					
ICS-300	Intermediate ICS	06/26/2019	Attained		Justification			
ICS-400	Advanced ICS	06/24/2019	Attained		Justification			
ICT4	Incident Command Type 4	06/26/2019	Attained		Justification			
ICT4CPX	ICT4 Complex Position Prereq	06/26/2019	Attained		Justification			
IS-700	NIMS An Introduction	06/21/2019	Attained		Justification			
RT-130	Annual Fire Safety Refresher	06/17/2019	Attained	06/17/2020				

In short, the competency table is a key defining table in IQCS organizes position requirements identified by policy documents. Types include:

- **Position** (code reflect qualification policy guides). i.e. ,SITL, ICT3, EDSP.
- **Training** (includes a hyphen). i.e., S-300, ICS-400, D-312.
- **Position Task Book** (position code ends with TB). i.e., HECMTB, AOBDBT, DIVSTB.
- **Licenses/Certificates** (code ends with LC). i.e., FAL3LC, PARALC.
- **Complex Competencies** (code ends with CPX or TPX). Complex competencies represent instances where prerequisite position (i.e. experience) and/or training are defined by more than one way/path to meet the requirement. Any time there is an “or” statement on a policy position qualification sheet in the prerequisite experience for a position or training, a complex competency is built.
  - Position complex requirements (code ends with CPX).
    - i.e., ATGSCPX, HEB2CPX, TFLDCPX.
  - Training complex prerequisite (code ends with TPX).
    - i.e., ADAMTPX, ATBMTPX .

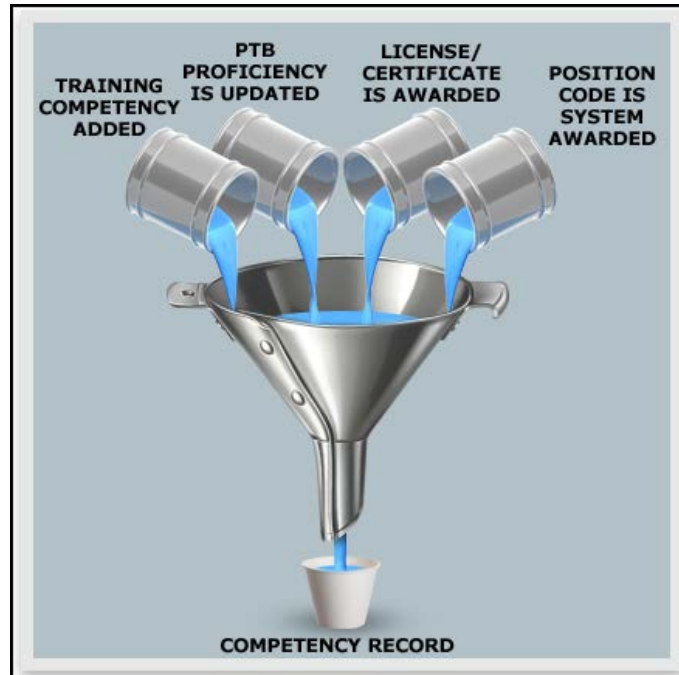
The competency record will maintain multiple rows of historic data.

- In the **Update/Display** mode, the user will only see the most recent effective-dated row.
- All rows of data can be viewed in the **Include History**.

- Edits to the **Competencies** page can be made by only select users in the Correct History mode.

## HOW COMPETENCIES ARE SYSTEM ADDED

Generally speaking, competencies are added and/or updated on a responder's competency record automatically when related changes are made in the system.



The following are examples of changes that can occur and the triggers for the change:

- A training competency is added on the Competencies page when the Responder Training page is updated.
- A Position Task Book (PTB) competency is added on the Competencies page when a PTB is initiated on the Position Task Book page.
- A PTB proficiency is updated on the Competencies page when the PTB expires or is certified on the Position Task Book page.
- A position competency is system awarded on the Competencies page when a PTB is certified on the responder's Position Task Book page.
- A license/certificate competency is added or updated on the Competencies page when the responder's Licenses and Certificates page is updated.
- Complex competencies are system awarded when a responder meets one of the multiple-position requirement paths.

## MANUALLY AWARDING AND DELETING COMPETENCIES

There may be circumstances that require you to manually award or delete manually awarded competencies:

- Award a position qualification that does not have/require a Position Task Book (PTB).
- Historically recognize an attainment in accordance to the responder's agency policy.
- To remove an incorrect manually awarded competency.
- To accurately reflect the responder's paper record.

Competencies are generally system awarded and are displayed as view only records when an action occurs at a source page that results in a competency being added.

- A position prerequisite (position CPX or training TPX) is met.
- A PTB is initiated.
- A certified PTB is completed.
- A training record is added in a completed status.
- A license/certificate is added.

Prior to manually awarding a position code, first check to see if there is an active PTB for the position at the responder's Position Task Book page. If the responder does have an active PTB for the position, the user may be able to delete the PTB if it meets the deletion criteria as set by the agencies.

Although the process for manually awarding competencies can be used for any competency (position CPX, training TPX, PTB, training, licenses/certificates, etc.) **it is not encouraged or recommended** in all circumstances. The responder's competency record is established and maintained at other screens and, in most cases, IQCS will automatically update the responder's competencies screen. These are all added from the individual source page and should be maintained from the source pages.

[Technical Specialist](#) positions are not represented in the [NWCG PMS 310-1](#) but are cataloged in the [Federal Wildland Fire Qualifications Supplement](#) and [DOI Incident Positions Qualification Guide \(IPQG\)](#). These positions may not have a PTB and thus the position code competency must be manually awarded.

If a manually awarded competency must be removed from a responder's Competencies page a authorizing official and justification statement are required. Only competencies that have been manually awarded can be removed. Once a competency has been deleted, a record of the removal will be displayed in the Deleted History tab.



*INSTRUCTIONS - MANUALLY AWARDING COMPETENCIES*

Use the process below to manually awarding a competency to a responder's Competencies page.

1. Navigate to **Qualification Management > Competency Management > Competencies**.
2. Search and select responder.
3. Select the Manually Award Comps tab.
4. At the **Competency** field, search and select the desired competency by clicking the **Lookup** icon. Pay attention to the category. For example,
  - FAL2 is a position
  - FAL2LC is a recurrent certificate
  - FAL2TB is a task book
5. Enter **Effective Date** for the competency.
6. **Expiration Date**. Available for entry for competencies that require an expiration date.
7. **Proficiency**. Depending on the competency, the selection options for proficiency will differ. The proficiency below is recommended when manually awarded the competency.
  - Position: Attained.
  - Training: Attained.
  - Licenses/Certificates: Active (if within valid date range).
  - Position Task Book: Admin Action.
  - CPX or TPX: Attained.
8. **Awarding Official**. Select the person authorizing the Administrative Action.
9. **Justification**. Enter a narrative statement in the Justification field that documents fully the Administrative Action. The amount of detail should be enough to satisfy an Office of Inspector General (OIG) audit.
10. **Award & Save**. Select this button to the left of the justification field to save and award competency. Select the **Clear Values** button to clear all entered data from this screen.
  - If a position competency was awarded the position will be added to responder **Incident Qualification Card** page and the qualification process will be ran to determine qualification status.
11. **Click Save**.

*INSTRUCTIONS – DELETING MANUALLY AWARDED COMPETENCIES*

Use the process below to delete a manually award competency from a responder's Competencies page.

1. Navigate to **Qualification Management > Competency Management > Competencies**.
2. Search and select responder.
3. Select the **Correct History** button.
4. Locate competency record to be deleted.
  - **Only** manually awarded competencies will be editable.
  - Manually awarded position competencies with an experience record of an arrival date after the attain date of the competency cannot be deleted.
5. Select the **minus** button.
6. Select the **OK** button.
7. Search and select the **Authorizing Official**. The person authorizing this record removal.
8. Select the **Justification** button and enter a narrative statement that justifies the removal of the competency from the responder's record.
9. Select the **OK** button.
10. Select the **OK** button again.
11. Select **Save** to commit the competency removal.
12. Select the **Delete History** tab to view the competency records that have been removed.

## POSITION TASK BOOKS

A feature in IQCS is the ability to manage PTBs for a responder. Once the responder meets all prerequisites policy, a PTB can be issued to that responder per their home unit direction. Successful completion of all critical tasks required for the position, as determined by the evaluator(s), will be the basis for recommending certification. The final evaluator signs the PTB as completed and recommends certification. The Certifying Official will determine if certification is appropriate. Refer to [NWCG PMS 310-1](#), [Federal Wildland Fire Qualification Supplement](#), [DOI IPQG](#) and your agency's policies for specifics on qualifications and PTB management.

When a responder participates in an incident assignment and was evaluated in an active PTB position, the evaluation level can be documented for the PTB in the application. For a PTB to be certified in the application, a successful (#1 level) evaluation record must be entered.

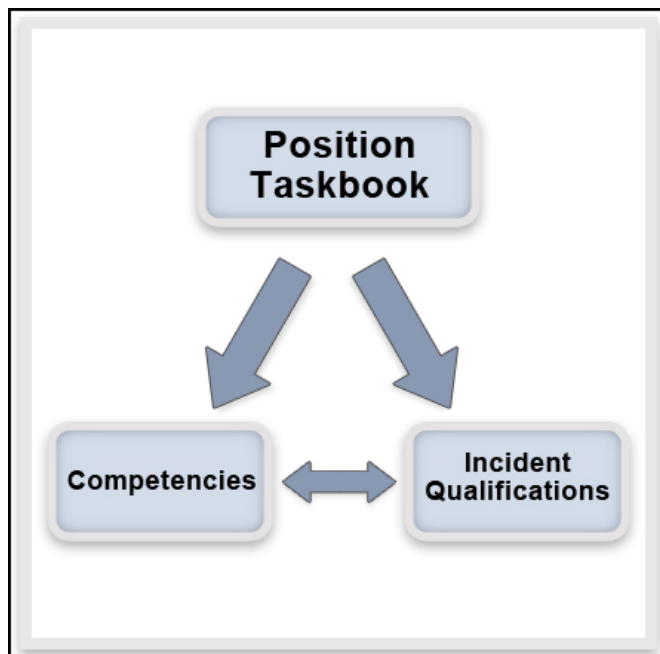
Besides documentation and building a historical record, this information is used for verifying prerequisite experience and for maintaining currency. The PTB Evaluation Report can assist Certifying Officials to assess progress and plan further training assignments for their responders.

### POSITION TASK BOOK TRIANGLE

PTBs link to two different pages within IQCS, and changes are automatically made to them when changes are made on the PTB page.

When a PTB is initiated and saved, IQCS simultaneously places the active task book competency on the responder's Competency page and places the position on the Incident Qual Card page with a status of Trainee.

When a PTB is ultimately certified and saved, IQCS simultaneously updates the status of the task book competency to Certified and adds the position competency in the status of Attained on the Competency page. The status on the Incident Qual Card page will change from Trainee to Qualified if all other position requirements are met. If not all requirements are met, then the status will be changed from Trainee to Unqualified.



## INITIATING A POSITION TASK BOOK

Issuing a PTB is the means within IQCS of assigning a new position on the Incident Qual Card page in a trainee qualification status. The system will monitor all the position requirements (competencies) for qualification.

When a PTB is entered in IQCS, the application will set an expiration date 3 years from the date of initiation per agency direction. Once the first experience record in the position is recorded, at the responder's Experience by Responder page, the 3-year period is reset from the arrival date of the experience record.

Responder Task Books										
Delete History										
Empl ID: 00000000165 Smith, Sally P										
Refresh										
Personalize Find First 12 of 2 Last										
Task Book	Position	SetID	Description	Initiate Date	Status	Expire Date	Evaluation	Certifier ID	Name	Certifying Date
1	EDRC	NWCG0	Expanded Dispatch Recorder	08/30/2017	Active	08/30/2020	Evaluation			
2	SCKN	NWCG0	Status/Check-In Recorder	02/17/2016	Certified		Evaluation	00000000161	Leader, Julie D	02/13/2017

If a responder has an active PTB and are issued an additional PTB of the same position code, the system will expire the previous PTB.

Responder Task Books										
Delete History										
Empl ID: 00000000165 Smith, Sally P										
Refresh										
Personalize Find First 13 of 3 Last										
Task Book	Position	SetID	Description	Initiate Date	Status	Expire Date	Evaluation	Certifier ID	Name	Certifying Date
1	EDRC	NWCG0	Expanded Dispatch Recorder	08/30/2017	Expired	05/01/2018	Evaluation			
2	EDRC	NWCG0	Expanded Dispatch Recorder	05/01/2018	Active	05/01/2021	Evaluation			
3	SCKN	NWCG0	Status/Check-In Recorder	02/17/2016	Certified		Evaluation	00000000161	Leader, Julie D	02/13/2017

## INSTRUCTIONS – INITIATE PTB

To initiate a PTB for a responder, follow the process below.

1. Navigate to **Qualification Management > Competency Management > Position Task Book**.
2. Search and select responder.
3. Select the **plus (+)** button to add a new row.
4. Enter or look up the **Position Code** the PTB is being issued.
5. Confirm that the **Set ID** is correct. It will fill in with the **Set ID** listed on the Job Data page, but account managers may edit the field if needed.
6. Select the **Initiate Date** field and enter the initiate date for the PTB.
7. The **Status** of the PTB will default to **Active**.
8. Select the **Save** button.

## POSITION TASK BOOK EVALUATIONS

The IQCS application is able to record the responder position task book evaluations to reflect the hard copy record for tracking and certification. It is important to remember that once the first experience, not an evaluation record, is entered for the position, the PTB expiration date will be adjusted per agency PTB completion timeframes.

A responder's task book record must have a successful evaluation entered in order for the PTB to be certified in the application. The recording of earlier position performance evaluations must follow your agency's policy.

The screenshot shows the 'Position Task Book Evaluations' form. At the top, it displays the responder's information: Empl ID: 00000000171, Smith, Sam J; Unit ID: ID-FCR, Fish & Wildlife Service - NIFC; PTB Set ID: NWCG0, National Wildfire Cord Group; and Position: EQTR, Equipment Time Recorder. Below this is the 'Evaluation' section with a search bar and pagination (1 of 2). The 'Evaluation Dt' is 08/17/2013 and the 'Evaluation Sequence' is 1. The 'Evaluator Information' section includes fields for Evaluator ID (00000000161), Agency (FS000), Unit ID (WA-OWF), Address, and Phone (123-456-4568). It also has a section for manual entry: 'OR... If the Evaluator is not in the list for this position. Name:'. The 'Incident/Event Information' section contains fields for IQCS Unique Incident ID (00000253848), Unique Incident ID (2013-CO-CFX-000400), Incident Name (RED CANYON), Incident Kind (WF), Complexity, and Fuel Type. The 'Evaluator's Recommendation' section has four radio button options for selecting the evaluation outcome.

When entering a PTB Evaluation it is important to keep the following in mind.

- **Evaluator Information** - A search for Evaluator ID will only return those evaluators that are currently or previously qualified in the position of the PTB. If no matching value is found for the evaluator, you have the option of manually entering the evaluator's information in the section below the Evaluator ID field. This is common when state responders are evaluators on incidents because states do not use IQCS.

- **Incident/Event Information** - An experience record will only be displayed in the lookup as selectable if **BOTH** of the following are met:
  1. Experience record(s) from the responder's Experience by Responder page match the position code of the PTB.
  - and**
  2. The experience arrival occurs between the initiation and expiration date of the PTB.
- Keep in mind that the recording of earlier position performance evaluations must follow your agency's policy.

#### *INSTRUCTIONS – ENTERING PTB EVALUATIONS*

To document a Position Task book (PTB) performance assignment for a responder, follow the process below.

1. Navigate to **Qualification Management > Competency Management > Position Task Book**.
2. Search and select responder.
3. Select the **Evaluation** button for the PTB being evaluated.
4. Select the **Evaluation Dt** field and enter the date on which the evaluation took place.
5. Enter or look up the **Evaluator ID** for the responder who conducted the evaluation.
  - If no matching values are found for the evaluator, you have the option of manually entering the evaluator's information. This is common when state responders are evaluators on incidents because states do not use IQCS. In this case, enter the evaluator's name, address, and phone number in the field where it says: "Or . . . if Evaluator is not in the IQCS System." The **Address** and **Telephone** fields will appear once a name is entered.
- **Incident/Event Information.** Lookup or enter the **IQCS Incident ID** for the incident experience during which the evaluation took place. An experience record will only be displayed in the lookup as selectable if **BOTH** of the following are met:
  1. Experience record(s) from the responder's Experience by Responder page match the position code of the PTB.
  - and**
  2. The experience arrival occurs between the initiation and expiration date of the PTB.
6. Select the radio button that corresponds to the PTB evaluation rating.
  - For the PTB to be certified, the PTB record must have an evaluation record entered at the top level (number 1) indicating that all tasks have been performed.
7. To add another evaluation, simply select the **plus (+)** button.
8. Select the **Save** button.

## CERTIFYING A POSITION TASK BOOK

Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation to the agency that the trainee be certified in that position.

Responder Task Books | Delete History

Empl ID: 0000000055 Shovel, Tommy K Refresh

Personalize | Find | First 1.3 of 3 Last

Position	SetID	Description	Initiate Date	Status	Expire Date	Evaluation	Certifier ID	Name	Certifying Date	Certify TB
1 FAL2	NWCG0	Intermediate Faller	06/25/2015	Active	05/10/2020	Evaluation				
2 FAL3	NWCG0	Basic Faller	06/24/2015	Certified		Evaluation	00000000161	Leader, Julie D	10/20/2015	<input checked="" type="checkbox"/>
3 FFT1	NWCG0	Firefighter Type 1	05/24/2017	Active	05/24/2020	Evaluation				

For the PTB to be certified, the PTB record must have an evaluation record entered at the top level (number 1) indicating that all tasks have been performed.

Certification of the PTB changes the status of the PTB on the responder's competency record and awards the position competency to that responder. Because these functions are tied together, once the Certify TB box is checked and the record saved, you will not be able to edit this information. If you have mistakenly certified a PTB and need these competencies removed, contact the IQCS Help Desk.

If the responder has attained all the position requirements, the Incident Qual Card is updated to a qualified status for that position. If not all position requirements have been attained, then the status is updated to Unqualified.

### INSTRUCTIONS – CERTIFYING A PTB

To certify a PTB for a responder, follow the process below.

1. Navigate to **Qualification Management > Competency Management > Position Task Book**.
2. Search and select responder.
3. Select the **Certification** tab.
4. Select the **Refresh** button if the Certifying ID field for the PTB you are certifying is not displayed.
5. A successful evaluation must be entered for the Certifying ID field to open and the PTB to be certified.
6. Enter or look up the **Certifier ID** for the responder who certified the PTB.
7. Select the **Certifying Date** field and enter the date on which the PTB was certified.
8. Select the **Certify TB** checkbox.
9. Select the **Save** button.
10. Select the **Task Book** tab to confirm that the **Status** has been updated from **Active** to **Certified**.

## EXPIRED POSITION TASK BOOK

If a position task book (PTB) has expired in IQCS a user has two options to return the PTB to an active status or re-activate the taskbook to enter evaluation(s) and certify.

1. **No associated experience records have been entered.**

If experience that occurred between the original initiate date and expiration date is entered for the responder, the expired task book will automatically return to active status and recalculate the expiration date without any other action needed by the account manager. After an experience record is entered the expiration date will be updated.

2. **One or more associated experience records have been entered.**

If at least one associated experience record has been entered and the task book has expired then the one time re-calculation has already occurred and the above option will not work. In which case a formal process of reactivating the task book can occur to allow evaluation(s) to be entered and the task book certified.

The Reactivate TB button will appear next to the task book record which will allow the account manager to re-open the task book temporarily to enter evaluations and certify.

### *INSTRUCTIONS – REACTIVATING A PTB*

1. Select **Reactivate** button
2. Enter an **Effective** date, **Authorizing Official** and a **Justification** statement.
  - Justification example, PTB record expired before final evaluation information was received by account manager for input.
3. Select the **Save** button
  - After saving, the task book will return to an active status to allow entry of evaluation(s) and/or certification.
  - It is important to remember that the task book reactivation is temporary and will be active only until the next nightly batch runs.

## DELETING A POSITION TASK BOOK

If a responder's task book meets PTB delete criteria (identified below) as set by the CMB, the row minus button will be available and the user will be required to enter an authorizing official and justification for the removal. The deleted PTB and authorization information will be stored and available for viewing on the **Deleted Task Book History** tab.

Per direction from you IQCS agency leads, this is **NOT** to be used to clean up a qualification a responder no longer wants in their record.

### **Position Task Book Delete Criteria**

- ✓ PTB is in an active status
- ✓ The issue date is less than two (2) years in the past.
- ✓ No experience for PTB position code exists.
- ✓ No evaluations entered for PTB position code.





Responder Task Books


Delete History

Empl ID: 00000000165 Smith, Sally P

Refresh

Personalize | Find |  

First 1 of 3 Last

Task Book												
Position	SetID	Description	Initiate Date	Status	Expire Date	Evaluation	Certifier ID	Name	Certifying Date	Certify TB		
1 EDRC	NWCG0	Expanded Dispatch Recorder	08/30/2017	Expired	05/01/2018	Evaluation						+
2 EDRC	NWCG0	Expanded Dispatch Recorder	05/01/2018	Active	05/01/2021	Evaluation						+ -
3 SCKN	NWCG0	Status/Check-In Recorder	02/17/2016	Certified		Evaluation	00000000161	Leader, Julie D	02/13/2017			+

If the PTB delete criteria is not met, the minus button will not be displayed and the user must submit an IQCS help ticket. Prior to removal by IQCS staff, the request will be assigned to the responder's IQCS Agency Lead for reviewed and approved. Each agency has specific guidance on PTB removal; become familiar with the requirements of your agency.

### INSTRUCTIONS – DELETING A RESPONDER PTB

1. Select the **Qualification Management > Competency Management > Position Task Book**.
2. Search and select responder.
3. Select the **minus** button at the end of the task book row to delete. The **minus** button will **only** be available if the following criteria is met:
  - PTB is in an active status.
  - The issue date less than two (2) years in the past.
  - No experience for position code exists.
  - No evaluations entered for position code.
4. Select OK to confirm the PTB delete upon save. Search and select the Authorizing Official.
5. Select the Justification button to enter a justification for removal. Select the OK button when complete.
6. Select the OK button after confirming the responder, task book and authorizing official are correct.
7. The PTB row will be removed from view. You must save the transaction for it to be completed. Selecting the **Refresh** button will return the PTB to the status it was when you first opened the page and your justification will be lost.
8. Select the **Save** button. Upon **saving**, the application will perform the following actions:
  - Add the deleted PTB and justification information to the Deleted Task Book History tab.
  - Remove the task book competency.
  - Remove the position from the responder's Incident Qual Card page if the position is not being populated from another source, e.g. position code was manually award at the Competencies page.

## TECHNICAL SPECIALIST POSITIONS

According to the [NWCG PMS 310-1](#) and [DOI IPQG](#), Technical Specialists are personnel with specialized skills gained through educational degree programs or industry training in established standards. These personnel may perform the same duties during an incident that they perform in their regular job and may receive supplemental training in order to use their specialized skills in the incident environment.

Agencies that utilize positions not contained in the [NWCG PMS 310-1](#), broadly referred to as Technical Specialists, typically establish minimum standards for these positions in the agency-specific manuals or guides.

IQCS has made the attainment of most Technical Specialist positions a manual award process if there is no PTB requirement identified on the position qualification sheet for qualification. If a responder must have a Technical Specialist position on their incident qualification card, it is necessary to add that position competency to the responder's Competencies page and document why you are awarding this position competency.

The [Federal Wildland Fire Qualifications Supplement](#) and the [DOI IPQG](#) have specific requirements for many of the Technical Specialist positions. These requirements have been added to the IQCS system, which will check to see if the responder meets all these requirements. While these additional requirements have been added to agency-specific Set ID jobs, the system will still require that the position competency be awarded to the responder.

**To award a position without a PTB requirement to a responder**, please refer to the [INSTRUCTIONS – MANUALLY AWARDED COMPETENCIES](#) section of this module.

**To delete a manually awarded position**, please refer to the [INSTRUCTIONS – DELETING MANUALLY AWARDED COMPETENCIES](#) section of this module.

## RESPONDER TRAINING

There are two ways to give a responder credit for having attended a course:

1. **Couse Session Enrollment**

- Used if course is being session managed by a course coordinator.
- Training record will automatically be displayed on the responder's training page if they have been added to the session roster.
- **Do not create a course session if you did not host the course session.** If a responder in your unit completed a training that has not been documented in IQCS, then add the completion manually at the Responder Training page.

2. **Manually at the Responder Training page**

- Users can manually adding the completed training to the responder's training record on the **Responder Training** page.

At the Responder Training page there are four tabs displayed. Three for recording training completions and a fourth for tracking training records that have been deleted. Most of a responder's completed training records will be added under the default IQCS Training tab.

- **IQCS Training**

- Training required for a qualification will be need be added under this tab and will award competencies for completed attendance.
- Training records that have been added by a user can be deleted via the minus button.
- Training records managed via course session management will automatically display if the responder has been added to the session roster.
- Training records managed via course session will be displayed as view only. Modification to the session and/or responder attendance must be made at the Course Session pages by those users with access.

- **Converted Training**

- Training which was migrated from the legacy systems
- View Only.

- **External Training**

- Used to record training that is not identified by the agencies as a qualification requirement
- Record will not award a competency

- **Delete History**

- Training records that have been removed from the IQCS Training tab will be automatically recorded on this tab.

## INSTRUCTIONS - MANUALLY CREDITING COURSE COMPLETION

To update manually award training to a responder that was not managed by session administration in IQCS, follow the process below.

1. Navigate to **Qualification Management > Competency Management > Responder Training**.
2. Search and select responder.
  - Once you have selected a responder, the training page will open with the responder's data and their attendance record for each course.
  - Training records managed via course session management will automatically display if the responder has been added to the session roster but will be displayed as view only. Modification to the session and/or responder attendance must be made at the Course Session pages by those users with access.
3. Select the tab that you will be entering training information under.
  - Most training will be added under the default IQCS Training tab.
4. Select the **plus** button to add a new row.
5. **Course Code**. Enter or look up the **Course Code**;
6. **Session**. Session number will not be entered for manually added training records.
7. **Course Title**. Will autofill from Course Code entered.
8. **Start Date**. Enter and/or select the course start date as identified on the training certificate.
9. **End Date**. Enter and/or select the course end date as identified on the training certificate.
  - This date will be the effective date of the competency(ies) awarded for a completed training record.
10. **Attendance**. Will default to **Completed** but can be changed if necessary.
11. **Sponsor**. The sponsor will not be entered for manually added training records.
12. Select the **Save** button.

If the course has competencies associated with it, the responder's competency record will be automatically credited with the associated competencies.

## LICENSES AND CERTIFICATES

There are certain position qualifications that require a responder to hold external certifications, licensing, warrants, and/or agency-defined specialties. When a license/certificate expiration date has passed, the associated position qualification that requires the competency will be automatically changed to unqualified at the responder's Incident Qual Card page.

Keep in mind, however, that even though IQCS can document these external licenses and certificates, the specifics for completing and maintaining them are governed by the authorizing entities.

If a license/certificate record has been entered incorrectly it can be deleted from a responder's Licenses and Certificate page. When the record is deleted, the application will automatically record the record removal in the Delete History tab and remove the associated competency from the responder's Competencies page.

### INSTRUCTIONS – ENTERING A LICENSE AND/OR CERTIFICATE

1. Navigate to **Qualification Management > Competency Management > Licenses and Certificates**.
2. Search and select responder.
3. Select the **License/Certificate Code**.
4. Enter the required **Issue Date**. Used as the **Attained Date** of the competency.
5. Enter the required **Expiration Date**. Used as the **Expire Date** of the competency.
6. Enter all other available information.
7. Select the **License Verified** check box, once information is verified.
  - If not checked, the corresponding competency will not be awarded.
  - If checked, the corresponding competency will be awarded.
  - If unchecked, the corresponding competency will be removed.
8. Select the **Save** button.

Licenses and Certificates entered at this screen will automatically maintain the license or certificate competency at the responder's competencies page if an associated competency has been tied to the license or certificate. To view if a competency has been awarded, navigate to the responders Competencies page.

**Note: Entering a license/certificate will NOT award a position code competency per agency direction.** For example, recording an AEMT licenses at the responder's Licenses and Certificate page will award the AEMTLC competency but **WILL NOT** award the AEMT (or AEMF) position competency. To have the AEMT and/or AEMF qualification appear on the responder's Incident Qual Card page, the position competency will have to be manually awarded a single time at the responder's Competencies page to authorize the responder to have the qualification added to their record.

## INCIDENTS

To credit a responder experience on an incident, the incident must first exist in the IQCS Incident Setup control table. It is important to keep in mind that the Incident Setup control table is merely a place-holder for very basic incident information as IQCS is not the system of record for incidents. IQCS is the system of record for responder qualifications and experience.

IQCS is connected to the Integrated Reporting of Wildland-Fire Information (IRWIN) application and pulls nine (9) incident header fields into IQCS to populate the Incident Setup control table. Due to changing incident complexity and size over the life of a fire, these fields are not recorded on the Incident Setup Page. Incident complexity and size can be entered at the Experience by Incident or Experience by Responder pages.

The incident status in IQCS will always be active even if the incident end date has been entered. This allows updates/corrections to responders' experience on the incident, if necessary.

There are two methods for an incident to exist in the Incident Setup table:

1. User entered
  - Are editable.
  - Unique Incident ID (previously called Incident Number) auto populated from the Begin Date, Unit ID and Local Incident ID fields.
  - Incident Year auto populated from Begin Date.
  - Event Category limited to the subcategory of the selected Event Kind.
  - Will **not** sync/merge to an IRWIN pulled incident.
2. Imported from IRWIN
  - Will display an IRWIN ID and a Last Updated date/time.
  - Are not editable in the IQCS application.
  - Data pulled (new and updates) every five minutes.
  - Assigned an IQCS Incident ID.
  - Will **not** sync/merge to an existing user entered incident.

When you create a new incident, IQCS will automatically assign the next available IQCS Incident ID number. This number unique to avoid errors should an incident number/name be reused in the future. This number is not the incidents Unique Incident ID (previously Incident Number).

### INSTRUCTIONS - CREATING A NEW INCIDENT

To create a new Incident Data record, follow the process below.

1. Navigate to **Qualification Management > Competency Management > Incident Setup**.
2. Select the **Add a New Value** tab.
3. If a number has populated in the **IQCS Incident ID** field, clear it.
4. Select the **Add** button.
5. **IQCS Incident ID:** Identified as NEW. Once information has been entered and the incident saved, a unique IQCS Incident ID will be assigned.

6. **IRWIN Incident ID.** Will be identified as **N/A-Incident was entered by user.**
7. **Incident Name.** Enter the full name of the incident. **Required.**
8. The **Unique Fire (Incident) ID** (2019-AL-ALF-000001) will be auto generated from the following fields:
  - **Begin Date** (step 9) for the year. Example 02/03/2019
  - **Unit ID** (step 12). Example AL-ALF
  - **Local Incident ID** (step 13). Example 000001
9. **Begin Date.** Enter the date on which the incident began. **Required.**
10. **End Date.** Enter the end date if known. Leave blank for unknown.
11. **Incident Year.** Populated from Begin Date.
12. **Unit ID.** Enter/select the **Unit ID**.
13. **Local Incident ID.** Enter the [Local Incident Identifier](#). Example: 000001.
14. **Event Kind:** Enter or lookup for the incident.
15. **Event Category:** Enter or look up the category. Only those that are a sub-category to Event Kind will be selectable.
16. **State:** Enter the state code.
17. **Fuel Model:** Enter or lookup the appropriate primary fuel.
18. Select the **Save** button. An **IQCS Incident ID** will be automatically assigned.

#### INSTRUCTIONS - VIEW/EDITING INCIDENT DATA

To view or edit Incident Data, follow the process below.

1. Navigate to **Qualification Management > Competency Management > Incident Setup.**
2. Search for incident.
3. View and/or make any changes.
  - **Imported from IRWIN**
    - ✓ Cannot be updated.
    - ✓ Will display an **IRWIN Incident ID**.
    - ✓ **Last Updated** will display the last time IQCS pulled/received an update.
  - **User Entered Incident**
    - ✓ Will not have an IRWIN Incident ID.
    - ✓ Are editable.
    - ✓ Changes to the Unique Incident ID, Name, Begin Date or the Event Category will result in a update to responders experience records.
4. Select the **Save** button or select the **Return to Search** button.

## RESPONDER EXPERIENCE

One of the main uses of IQCS is the ability to record a responder's incident experience as it applies to his or her agency qualifications. A responder's incident experience establishes prerequisite position experience for upward progression in the organization, updates currency, and provides the responder with a permanent record of qualification incident experience over time. The experience record is also used when documenting Position Task Book evaluations.

**When entering an experience record, the Incident, Arrival Date and Operational Period can be the same as another entry as long as the Position is different.**

There are two pages used to record responder experience in IQCS.

### 1. Experience by Responder

Experience by Responder

Empl ID 0000000000 Smith, Sally Z

</

### 2. Experience by Incident

Experience By Incident													
IQCS Incident ID: 00000408944													
Unique Incident ID: 2018-MI-HMF-180214				Incident Name: Rail									
Begin Date: 05/18/2018 Year 2018				Event Category: WF Wildfire				Transfer to Incident Setup					
Load Responders by Group: Unit ID <input type="text"/>				Group ID <input type="text"/>				Load Responders					
*Empl ID	Name	Position	Experience Status	Arrival Date	Operational Periods	Complexity	Size Class	Fuel Model					
1 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					



## INSTRUCTIONS - ENTER EXPERIENCE BY RESPONDER

To enter an experience record for a responder, follow the process below.

1. Navigate to **Qualification Management > Competency Management > Experience by Responder**.
2. Search and select responder.
3. Review responder experience record to confirm experience does not already exist.
  - Sort columns if necessary or use the **Find** link on the top right of grid.
4. Select the **plus** button to add a new row.
5. Click on the **Search** button and enter search parameters to find the incident.
6. The **Unique Incident ID, Incident Name, Year, Begin Date** will auto populate from the **Incident Setup** Page.
7. **Position Code**. Enter or look up the position that the responder performed during the incident.
  - Only the positions on the responder's Incident Qual Card are available for selection.
  - Incident, arrival date and operational periods can be the same as long as the position code is different.
8. **Experience Status**. Select the dropdown menu and select the qualification status the responder was deployed as. This will be Qualified or Trainee.
9. **Arrival Date**. Select the field and enter the date the responder arrived at the incident.
10. **Operational Periods**. Select the field and enter the number of operation periods the responder was deployed to the incident.
11. **Complexity**. Select the field and enter the Management Level for the incident when the responder was deployed to the incident.
12. **Size Class**. Select the field and enter the incident size when the responder was deployed to the incident.
13. **Fuel Model**. Accept, add or change the Fuel Model to reflect the type when the responder was assigned to the incident.
14. **Event Type**. Will populate automatically from data entered on the Incident Setup page.
15. Select the **Save** button.

## INSTRUCTIONS - ENTERING EXPERIENCE BY INCIDENT

The Experience by Incident page is for users to enter responder experience on an incident record for an individual responder or a group of responders. Experience entered on this page will populate the responder's experience record.

1. Navigate to **Qualification Management > Competency Management > Experience by Incident**.
2. Search and select the incident.
3. The **IQCS Incident ID, Unique Incident Number, Incident Name, Begin Date, Year** and **Event Category** will be displayed above the table.
4. Enter experience records by:
  - **Individual responder**
    1. Select the **plus** button to add a new row.
    2. **Empl ID**. Search and select responder.
  - **Load Responders by Group**
    1. **Unit ID**. Enter or search and select the Unit ID of the group.
    2. **Group ID**. Enter or search and select the Group ID.
    3. **Load Responders**. Select the **Load Responders** button to add the pre-established responders from the selected Group ID.
    4. Once the group is loaded, individual responders can be removed/deleted from the grid until a save occurs.
5. **Position Code**. Enter or look up for the position that the responder performed during the incident. Only the positions on the responder's Incident Qual Card are available.
6. **Experience Status**. Select the dropdown menu and select the qualification status the responder was deployed as. This will be qualified or trainee.
7. **Arrival Date**. Select the field and enter the date the responder arrived at the incident.
8. **Operational Periods**. Select the field and enter the number of operation periods the responder was deployed to the incident.
9. **Complexity**. Select the field and enter the Management Level for the incident when the responder was deployed to the incident.
10. **Size Class**. Select the field and enter the incident size when the responder was deployed to the incident.
11. **Fuel Model**. Accept, add or change the Fuel Model to reflect the type when the responder was assigned to the incident.
12. Select the **Save** button. Once saved,
  - The experience row will be added to the responder's Experience by Responder page.
  - The record cannot be deleted from this page but it must be deleted from the Experience by Responder page.
  - The system will not add a duplicate experience record. A notification will be presented if a duplicate entry exists.

## CURRENCY REQUIREMENTS

All qualifications, with exception of Technical Specialist (THSP), have currency requirements identified by the agencies. The IQCS application reflects and enforces the maximum time allowed for maintaining currency as established by agency policy.

Per the [NWCG PMS 310-1](#), the [Forest Service Fire and Aviation Qualifications Guide \(FSFAQG\)](#) and the [DOI IPQG](#)

*For the positions identified in this guide, the maximum time allowed for maintaining currency is 3 years for air operations, faller, and dispatch positions. All other positions have a 5-year currency requirement.*

*Currency for a position can be maintained by successful performance within the given timeframes in that position or successful performance as a Trainee or Qualified in positions identified in this guide.*

Please refer to the [NWCG PMS 310-1](#), [FSFAQG](#), [DOI IPQG](#), or your agency manual for specifics on currency requirements.

## IQCS TROUBLE SHOOTER

IQCS has a built-in function to match the attainments of a responder to the requirements of a position. The Responder to Position page can be used to determine what the responder is missing for qualification or futuring.

The Reason button on the responder's Incident Qual Card page will also identify why the responder is not naturally qualified in a position.

Select for Match

Competency Match

Supervisor, Steve A  
**Setid:** BLM00      **Position:** CRWB      Crew Boss, Single Resource  
**Empl ID:** 00000119737      **CH ID:**  

**CRWB on Qual Card**  
**Status: Unqualified**  
**Not Overridden**

**Criteria Dt:** 11/24/2017

Match Analysis

**Total Competencies:** 9 out of: 10

**As Of Date:** 11/24/2017     
● Prereq Met     
● Taskbook Active     
○ Prereq Not Met or Expired

Competencies

Find | View All    First 1-10 of 10 Last

Competency	Expire Dt:	Training Scheduled
CRWBTB      Single Resource Boss CRWB PTB		<input type="checkbox"/>
FFT1      Firefighter Type 1		<input type="checkbox"/>
FITCAT      Fitness Category	11/02/2018	<input type="checkbox"/>
ICS-100      Introduction to ICS		<input type="checkbox"/>
ICS-200      Basic ICS		<input type="checkbox"/>
IS-700      NIMS An Introduction		<input type="checkbox"/>
L-280      Followership to Leadership		<input type="checkbox"/>
RT-130      Annual Fire Safety Refresher	11/16/2018	<input type="checkbox"/>
S-230      Crew Boss (Single Resource)		<input type="checkbox"/>
S-290      Intern Wildland Fire Behavior		<input type="checkbox"/>

**INSTRUCTIONS – RESPONDER TO POSITION TROUBLE SHOOTING**

1. Navigate to Qualification Management > Trouble Shooting > Responder to Position Matching.
2. Search and select responder.
3. Enter or search for a position to match the responder too.
4. **Set ID** (Business Unit). Will auto populate based on the responder's Set ID agency and that agency's Set ID Process Mapping.
  - Use NWCG0 for positions covered in [NWCG Wildland Fire Qualification System Guide \(PMS 310-1\)](#) or technical specialist positions used by multiple agencies.
  - Use AF000, ARMY0, BIA00, BLM00, FWS00, FS000, NPS00 or TNC00 for agency-specific.
  - Use AH000 for DOI [Incident Position Qualification Guide \(IPQG\)](#).
5. **As of Date**. Will auto populate to determine the position criteria against which to check the position. This date can be adjusted.
  - If the responder has the position, will be equal to attain date.
  - If responder does not have position, will be equal to current date.
6. Select the **Do Matching** button to run matching and open Competency Match tab.
  - The Competencies identify the requirements of the position per the Set ID.
  - To view complex competencies (TPX or CPX) or equivalencies select the icon displayed on same row.
  - **Green** filled dot indicates requirement has been met.
  - **Yellow** partially filled dot indicates position task book is active.
  - **Red** unfilled dot indicates requirement has not been met.
  - Training Schedule indicates if responder is enrolled in training.
  - Expire Date indicated when the recurrent training will or has expired.
7. To run match again, select the Select for Match tab.

## NEEDS ASSESSMENT

The Needs Assessment function of the IQCS is part of Workforce Analytics and has been designed to assist Local, Geographic Area, and National Levels to reveal shortages and surpluses of resources.

Once data has been entered for an Organization or Unit ID and upon running a needs analysis report, the application will compare the identified target to the current organizational number. However, **prior to running a needs analysis report, the user must run the Update by Year.** This will gather the current data of qualified and trainees for population on the reports.

### UNIT NEEDS

Identifying the targeted number of qualified individuals needed in each position for a Unit ID. Once entered and upon running a needs analysis report, the application will compare the identified target to the current organizational number. However, **prior to running a needs analysis report, the user must run the Update by Year.** This will gather the current data of qualified and trainees for population on the reports.

Unit Needs		
Unit ID: ID-BOD    Boise District		
Year: 2017    Find   View All    First 21 of 21 Last		
*Year: 2017    + -		
Personalize   Find   View 5 of 21   147-246 of 275 Last		
Group Type ID	*Position	Number needed
147	ICT3	12    + -
148	ICT4	25    + -
149	ICT5	30    + -

#### INSTRUCTIONS – UNIT NEEDS

1. Navigate to **Qualification Management > Needs Assessment > Unit Needs.**
2. Enter or search for **Unit ID.**
3. Navigate to the appropriate year using the First and Last arrows or links.
4. **Group Type ID.** Enter or lookup the Group Type ID for each position. (optional)
5. **Number needed.** Enter the target number of qualified responders for each position.
6. **Save.**

### ORGANIZATIONAL NEEDS

Identifying the targeted number of qualified individuals needed in each position for an organizational code. Once entered and upon running a needs analysis report, the application will compare the identified target to the current organizational number. However, **prior to running a needs analysis report, the user must run the Update by Year.** This will gather the current data of qualified and trainees for population on the reports.

#### INSTRUCTIONS – ORGANIZATIONAL NEEDS

1. Navigate to **Qualification Management > Needs Assessment > Organizational Needs.**
2. Select the **Advance Search** hyperlink by the **Search** button.
3. Enter the agency **Set ID.**

4. Enter or search the **Organizational Code**.
5. Navigate to the appropriate year using the First and Last arrows or links.
6. **Group Type ID**. Enter or lookup the Group Type ID for each position. (optional)
7. **Number needed**. Enter the target number of qualified responders for each position.
8. **Save**.

### **ANNUAL ROLL**

For the needs analysis reports to use current data (i.e., current year), the target data will need to be rolled over annually. This process will copy the previous year (i.e., 2017) organizational/unit needs in to the current year (i.e., 2018). This only needs to be done once per year.

#### *INSTRUCTIONS – ANNUAL ROLL*

1. Navigate to **Workforce Development > Needs Assessment > Annual Roll**.
2. Enter run control ID or click on and select the Run Control ID.
3. Select “Report run type.”
4. Look Up/Select Unit ID if for a Unit Needs.
5. Look Up/Select Set ID if for an Organization Needs.
6. Look Up/Select Organization ID if for an Organization Needs.
7. Enter **From Date** and **Thru Date**.
8. Process using the same procedures as running a Report. This will move data forward and use current information stored in the system for performing the Organizational Needs Assessment.

### **UPDATE BY YEAR**

Prior to running a needs analysis report, the user must run the Update by Year. This will gather the current data of qualified and trainees for population on the reports.

#### *INSTRUCTIONS – UPDATE BY YEAR*

1. Navigate to **Workforce Development > Needs Assessment > Update by Year**.
2. Enter run control ID or click on and select the Run Control ID.
3. **From Date**. Select or enter a date to update from.
4. Process using the same procedures as running a Report. This will move data forward and use current information stored in the system for performing the Organizational Needs Assessment.

## COMPETENCY MANAGEMENT RELATED REPORTS

The following reports may assist a user in the competency management of responder qualifications. For a full list of reports available in IQCS and directions on how to run reports, or specifics on a report, please refer to the [Reports Module](#).

<b>Reports &gt; Training &gt; Responders</b>	<b>Report Number</b>
License and Certificates	C11
Fitness/RT130 Expiration	C26
Fitness Test Summary	C027
Expiring Recurrent Training	C48
Courses Taken/Not Taken	C170
Training Needs Assessment	C401
<b>Reports &gt; Task Books</b>	<b>Report Number</b>
Responder Task Books	C005
Task Book Summary	C104
Task Book Evaluations	C150
<b>Reports &gt; Qualifications</b>	<b>Report Number</b>
Responder List	C003
License and Certificates	C11
Responder Master Record	C28
Responder Position Currency	C45
Qualification List	C050
Responder Experience Summary	C152
Responder Experience	C153
Responder to Position	C302
Qual/Competencies Justifications	C333
Org/Unit Full Data	C360
<b>Reports &gt; Needs Analysis</b>	<b>Report Number</b>
Workforce Analysis Detail	C163
Time to Position	C331
<b>Reports &gt; Positions</b>	<b>Report Number</b>
Position Qual Criteria	C94