IQCS User Guide

MODULE 7: POSITION TASKBOOKS

OVERVIEW

Welcome to the Position Taskbooks module. In this module, we will discuss the Position Taskbooks (PTBs) used by the Incident Qualifications and Certification System (IQCS) and how they can be managed for a responder.

A feature in IQCS is the ability to manage position taskbook(s) (PTB) for a responder. Once the responder meets all prerequisites per policy, a PTB can be issued to that responder. Successful completion of all 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.

When an individual participates in an incident assignment and was evaluated in the active PTB position, the evaluation is documented and comments can be captured for the Position Task Book (PTB). Besides documentation and building a historical record, this information is used for verifying prerequisite experience and for maintaining currency.

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POSITION TASKBOOKS

A feature in IQCS is the ability to manage position taskbook(s) (PTB) 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.

When an individual participates in an incident assignment and was evaluated in the active PTB position, the evaluation is documented and comments can be captured for the PTB. 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.

Refer to PMS 310-1, Federal Wildland Fire Qualification Supplement, DOI IPQG and your agency's policies for specifics on qualifications and PTB management.
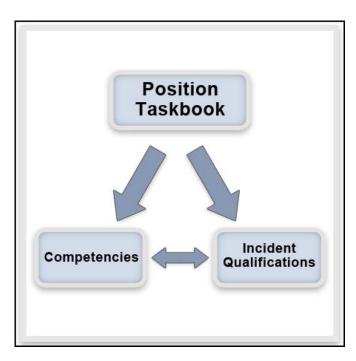
Position Task Book						
Empl ID: 00000094324 Shovel,Sammy					Refresh	

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Task Book | **Certification**

	Position	SetID	Description	Initiate Date	Status	Expire Date	Evaluation	
1	EDRC	NWCG0	Expanded Dispatch Recorder	04/21/2011	Expired	04/21/2014	Evaluation	+
2	PTRC	NWCG0	Personnel Time Recorder	07/01/2013	Certified		Evaluation	+
3	TIME	NWCG0	Time Unit Leader	08/13/2013	Active	08/13/2016	Evaluation	+

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POSITION TASKBOOK 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 taskbook 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 taskbook 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 all requirements are not met, then the status will be changed from Trainee to Unqualified.

INITIATING A POSITION TASKBOOK

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

When a PTB is initiated, IQCS sets an expiration date 3 years from the date of initiation. Once the first experience is entered for that PTB, the 3-year period is reset.

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

INSTRUCTIONS – INITIATE PTB

To initiate a Position Taskbook (PTB) for a responder, follow the process below.

1. Navigate to **Qualification Management** > **Competency Management** > **Position Task Book**.
2. Search for your desired responder.
    - **Note**: if using the Name field, the format is LastName,FirstName. Do not use any spaces.
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 **SetID** is correct. It will fill in with the **SetID** 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 TASKBOOK PERFORMANCE ASSIGNMENTS

In order for a responder to complete his or her PTB, they will have to be evaluated on the tasks included in that PTB. Once the incident assignment for the active taskbook has been entered for the responder, the evaluations of the tasks included in that PTB can be recorded in IQCS.

These tasks need to be evaluated by an identified evaluator. IQCS documents the qualified evaluator, as listed in the PTB. It displays a listing of qualified, or previously qualified, responders in IQCS for the identified position. IQCS also allows the documentation of the evaluator who is not in the system.

A responder will need to receive a Successful evaluation in order to be certified and to ultimately complete his or her PTB. Remember that once the first experience is entered for the position, the PTB expiration date will reset.

PTB EVALUATION

When a responder participates in an incident assignment and is evaluated in the active PTB position, the evaluation is documented and comments can be captured for the PTB.

Besides documentation and building a historical record, these evaluations are used for verifying prerequisite experience and for maintaining currency. The PTB Evaluation report can assist Certifying Officials in assessing progress and planning further training assignments for their responders.

PTB INCIDENT EXPERIENCE

If you are going to document a PTB performance assignment, you will have to include the Incident ID during which the tasks being evaluated were performed.

A search for Incident ID will return only the list of incidents that a responder has in his or her experience record that occurred after the initiate date of the PTB.

If the incident does not show up, you can enter the incident on the responder's record by navigating to Enter Experience by Responder and adding the incident.

PTB EVALUATORS

When you run a search for PTB evaluators, only those evaluators that are currently or previously qualified in the position of the PTB being evaluated will show up in the search.

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. Once the evaluator's name has been entered in the Name field, below the 'Or…if the Evaluator is not in the list for this position' sentence, the Address and Telephone fields will appear.

If the evaluator added written comments on the PTB evaluation record, you can enter them here by selecting the **Comments** button. This is not a required IQCS screen, but is a great place to track this information.

PTB Evaluator's Recommendation

Select the appropriate evaluation radio button for the evaluation that you are recording. In order for a PTB to be certified in IQCS, the responder must have an evaluation that has been identified as 'Successful.'

Keep in mind that the recording of earlier position performance evaluations must follow your agency's policy.
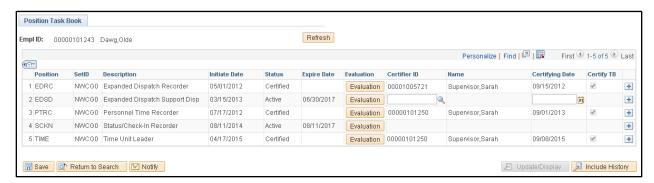
INSTRUCTIONS – RECORDING PTB EVALUATIONS

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

1. Navigate to **Qualification Management** > **Competency Management** > **Position Taskbook**.
2. Search for your desired responder.
    *   **Note**: if using the Name field, the format is LastName,FirstName. Do not use any spaces.
3. Select the **Evaluation** button for the PTB that is being evaluated.
4. Select the **Eval Dt** field and enter the date on which the evaluation took place.
5. Enter or look up the **Incident ID** for the incident experience during which the evaluation took place.
    *   The <u>responders incident experience</u> must be recorded and have occurred during the initiated date and expire date of the PTB for the record to be displayed. **Only incident experience that occurred after the initiation date and before the expiration date will be displayed in the lookup.**
6. 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.
7. Select the radio button that corresponds to the PTB evaluation rating.
8. Select the **Comments** button.
9. Select the text box and enter in any comment that was included with the evaluation.
10. Select the **OK** button.
11. To add another evaluation, simply select the **plus** button.
12. Select the **Save** button.

CERTIFYING A POSITION TASKBOOK

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.

It is important to remember that in order to certify a PTB, **both an experience assignment on an incident and a 'Successful' evaluation need to be completed, in that order**.

Position Task Book											

Empl ID: 00000101243 Dawg,Olde   Refresh

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	Position	SetID	Description	Initiate Date	Status	Expire Date	Evaluation	Certifier ID	Name	Certifying Date	Certify TB	
1	EDRC	NWCG0	Expanded Dispatch Recorder	05/01/2012	Certified		Evaluation	00001005721	Supervisor,Sarah	09/15/2012	☑	+
2	EDSD	NWCG0	Expanded Dispatch Support Disp	03/15/2013	Active	06/30/2017	Evaluation					+
3	PTRC	NWCG0	Personnel Time Recorder	07/17/2012	Certified		Evaluation	00000101250	Supervisor,Sarah	09/01/2013	☑	+
4	SCKN	NWCG0	Status/Check-In Recorder	08/11/2014	Active	08/11/2017	Evaluation					+
5	TIME	NWCG0	Time Unit Leader	04/17/2015	Certified		Evaluation	00000101250	Supervisor,Sarah	09/08/2015	☑	+

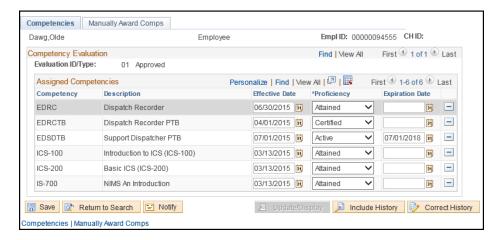Save | Return to Search | Notify   Update/Display | Include History

INSTRUCTIONS – CERTIFYING A PTB

To certify a Position Taskbook (PTB) for a responder, follow the process below.

1. Navigate to **Qualification Management** > **Competency Management** > **Position Task Book**.
2. Search for your desired responder.
   - **Note:** if using the Name field, the format is LastName,FirstName (smith,john). Do not use any spaces.
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**.

PTB STATUS CHANGES

Certification of the PTB changes the status of the PTB on the responder's competency record and awards the position competency to that responder.

If the responder has attained all the position requirements, the Incident Qual Card is updated with the 'Qualified' status for that position.

If not all position requirements have been attained, then the status is updated to 'Unqualified'.

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.

REMOVING POSITION TASKBOOKS

If the responder does have an active or expired PTB that has been requested to be removed/deleted the user will have to request to have it removed/deleted via the IQCS Help Desk through the submission of an IQCS Help Ticket. Prior to removal, the request will be reviewed and approved by an IQCS Agency Representative. Each agency has specific guidance on PTB removal; become familiar with the requirements of your agency.

Active PTBs with evaluation records **cannot** be removed/deleted from IQCS from a responder's record.

POSITION TASKBOOKS RELATED REPORTS

The following reports may assist a user in the management of position taskbooks in IQCS. 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.

Reports > Taskbooks	Report Number
Responder Task Books	C5
Task Book Summary	C104
Task Book Evaluation	C150
Reports > Qualifications	**Report Number**
Responder Master Record	C28
Responder Position Currency	C45
Qualification Master List	C50
Responder Experience Summary	C152
Responder Detail Experience	C153
Responder to Role Match	C302
Qual/Competencies Justifications	C333
Reports > Needs Analysis	**Report Number**
Training Needs Assessment	C401
Reports > Positions	**Report Number**
Position Qualification Criteria	C94