



# NATIONAL QUALIFICATION SYSTEM (NQS)

POSITION TASK BOOK  
FOR THE POSITION OF

## FINANCE ADMIN SPECIALIST

Version: March 2024

Check the appropriate position type:

Single Type

*(All WVEMD SEOC positions are Single Type)*

<b>POSITION TASK BOOK ASSIGNED TO:</b>
TRAINEE'S NAME:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
<b>POSITION TASK BOOK INITIATED BY:</b>
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
<b>POSITION TASK BOOK WAS INITIATED:</b>
LOCATION:
DATE:

## Required Training

The following courses are required for full PTB completion:

CATEGORY	CODE	TITLE
General	IS-100	Introduction to the Incident Command System
	IS-200	Basic Incident Command System for Initial Response
	IS-700	An Introduction to the National Incident Management System
	IS-800	National Response Framework, An Introduction
Professional Development Series	IS-120	An Introduction to Exercises
	IS-230	Fundamentals of Emergency Management
	IS-235	Emergency Planning
	IS-240	Leadership and Influence
	IS-241	Decision Making and Problem Solving
	IS-242	Effective Communication
Advanced ICS	G-0191	Emergency Operations Center/ICS Interface
	IS-2200	Basic Emergency Operations Center Functions

## Recommended Training

The following courses are **not** required for full PTB completion, but are recommended to enhance your understanding of this position:

CATEGORY	CODE	TITLE
Advanced ICS	ICS 300	Intermediate ICS for Expanding Incidents
	ICS 400	Advanced ICS

### Task Completion Codes

- (C) – Task performed in a classroom or training setting.
- (E) – Task performed during full-scale exercise.
- (F) – Task performed during a functional exercise.
- (T) – Task performed during a tabletop exercise.
- (I) – Task performed during a real-life incident or event.
- (J) – Task performed during day-to-day job duties.
- (A) – Task may be endorsed at any time.

#### ***Task Category: Perform action tracking***

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Collect and track open tasks, issues and action items through resolution.	E, F, I		
2. Communicate about tasks, issues, and action items horizontally and vertically as necessary to create awareness and ensure completion.	E, F, I		

#### ***Task Category: Order/request resources***

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Demonstrate understanding of various resource ordering/requesting procedures and requirements.	C, E, F, I, T		
4. Ensure that documentation aligns with reimbursement requirements: <ul style="list-style-type: none"> <li>• Document necessary approvals</li> </ul>	E, F, I, J		
5. Ensure that requests address the resources' logistical needs.	E, F, I		
6. Identify appropriate sources: <ul style="list-style-type: none"> <li>• Intrastate agreements and compacts</li> <li>• Interorganizational agreements such as Memorandums of Understanding (MOU) and Memorandums of Agreement (MOA)</li> <li>• Emergency Management Assistance Compacts (EMAC)</li> <li>• Tribal and local jurisdiction agreements</li> <li>• Preapproved vendors and on-call contracts</li> </ul>	E, F, I, T		
7. Transmit vertical resource requests, such as from local to state or from state to Federal.	E, F, I		
8. Update status of resource requests.	E, F, I		

#### ***Task Category: Complete common coordination and accountability tasks associated with all positions within the EOC***

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>9.</b> Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities: <ul style="list-style-type: none"> <li>● Demonstrate general awareness of local risks and hazards</li> </ul>	C, E, F, I, T		
<b>10.</b> Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
<b>11.</b> Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J		
<b>12.</b> Comply with relevant health and safety requirements.	E, F, I		
<b>13.</b> Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T		
<b>14.</b> Participate in the EOC planning process.	E, F, I		
<b>15.</b> Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		
<b>16.</b> Follow general internal and external information flow processes: <ul style="list-style-type: none"> <li>● Demonstrate knowledge of information management systems, such as incident management software</li> </ul>	E, F, I		
<b>17.</b> Manage essential elements of information and critical information requests in accordance with processes and procedures: <ul style="list-style-type: none"> <li>● Follow EOC approval authorities</li> <li>● Properly handle Personally Identifiable Information (PII) and sensitive information</li> <li>● Provide proper documentation for record-keeping and accountability</li> <li>● Provide information for reports and leadership decisions</li> </ul>	E, F, I		
<b>18.</b> Practice proper knowledge management processes and procedures: <ul style="list-style-type: none"> <li>● File structures</li> <li>● Naming conventions</li> <li>● Archiving processes</li> <li>● Position logs</li> </ul>	E, F, I		
<b>19.</b> Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.	E, F, I		
<b>20.</b> Participate in orderly transition of resources and processes from response to recovery.	E, F, I		
<b>21.</b> Transfer responsibilities upon completion of assignment: <ul style="list-style-type: none"> <li>● Transfer to replacement, recovery personnel, or other responsible party</li> <li>● If necessary, shift responsibilities to a non-disaster/day-to-day job</li> </ul>	E, F, I		
<b>22.</b> Participate in EOC training and exercises.	E, F		
<b>23.</b> Participate in after action review and improvement planning.	E, F, I, T		

***Task Category: Understand potential sources***

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>24.</b> Demonstrate awareness of resource sources: <ul style="list-style-type: none"> <li>● For various disciplines</li> <li>● Regional, state, local, tribal, territorial, Federal, private sector, and nongovernmental organization (NGO) sources</li> <li>● Preapproved vendors and on-call contracts</li> </ul>	E, F, I, T		
<b>25.</b> Coordinate with resource acquisition personnel from other organizations to identify potential resources and gain better understanding of sourcing mechanisms.	E, F, I		
<b>26.</b> Prioritize the allocation of scarce resources.	E, F, I		
<b>27.</b> Demonstrate awareness of incident-specific fiscal and resource constraints.	E, F, I, T		
<b>28.</b> Identify options for fulfilling resource requirements or requests: <ul style="list-style-type: none"> <li>● Validate that options meet needs</li> <li>● Consider constraints</li> <li>● Consider support requirements</li> <li>● Estimate costs</li> </ul>	E, F, I		
<b>29.</b> Identify and communicate resource support requirements, such as lodging, feeding, fuel, power, and equipment operators.	E, F, I		
<b>30.</b> Develop courses of action for fulfilling resource requirements or requests, factoring in considerations such as: <ul style="list-style-type: none"> <li>● Incident needs and priorities</li> <li>● Logistical factors, such as transport, security, storage, and support requirements</li> <li>● Legal considerations</li> <li>● Financial factors/costs</li> <li>● Backfill requirements</li> <li>● Mutual aid, private sector, and Voluntary Organizations Active in Disaster (VOAD) capabilities</li> </ul>	E, F, I		
<b>31.</b> Determine the best option for fulfilling resource requirements.	E, F, I		
<b>32.</b> Facilitate the acquisition process based on chosen course of action.	E, F, I		
<b>33.</b> Notify appropriate personnel for resource fulfillment and information based on selected course of action: <ul style="list-style-type: none"> <li>● Close loop for requestor and report resource request status</li> </ul>	E, F, I		

***Task Category: Track resources***

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>34.</b> Demonstrate knowledge of EOC and field operations resource tracking processes.	E, F, I, T		
<b>35.</b> Monitor and track resources and supporting logistics.	E, F, I		
<b>36.</b> Update requestor on request status, estimated time of arrival, and related logistical details: <ul style="list-style-type: none"> <li>● Verify that provided information meets incident needs</li> </ul>	E, F, I		

37. Establish communication channels to maintain resource status.	E, F, I		
38. Track resources from initial request through: <ul style="list-style-type: none"> <li>● Hand-off to incident, or Demobilization (for resources that remain under EOC management)</li> </ul>	E, F, I		
39. Anticipate, recognize, plan for, and address resource drawdown levels for resources that remain under EOC management.	E, F, I		
40. Communicate with incident command and EOC stakeholders regarding resource status.	E, F, I		

**Task Category: Administer financial management for jurisdictional expenditures**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
41. Demonstrate knowledge of jurisdictional/organizational procurement policies: <ul style="list-style-type: none"> <li>● Standard operations</li> <li>● Emergency operations</li> <li>● Cost-tracking processes and requirements: <ul style="list-style-type: none"> <li>○ Preapproved vendors</li> <li>○ On-call contracts</li> </ul> </li> </ul>	E, F, I, J		
42. Demonstrate awareness of fiscal implications and requirements when: <ul style="list-style-type: none"> <li>● Requesting or activating resources</li> <li>● Operating under various types of emergency or disaster declarations</li> <li>● Receiving external, Federal, or state assistance</li> <li>● Using volunteer resources</li> </ul>	E, F, I, J, T		
43. Ensure policies and procedures are in place to comply with applicable reimbursement requirements.	E, F, I, J		
44. Seek information on the financial requirements of incoming resources, such as: <ul style="list-style-type: none"> <li>● National Guard assets</li> <li>● Mutual aid resources</li> </ul>	E, F, I		
45. Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.	E, F, I, J		
46. Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.	E, F, I		

<p><b>47.</b> Collect, track, and document data related to funding and expenses:</p> <ul style="list-style-type: none"> <li>● Monitor compensation processes for time and pay</li> <li>● Coordinate with risk management on costs involved in workers' compensation claims, damage claims, tort claims, and other incident-related claims</li> <li>● Implement plan to coordinate and manage monetary donations</li> <li>● Coordinate, collect, and track volunteer time and maintain documentation for potential reimbursement requests</li> <li>● Identify and follow any use limitations for various funding sources</li> <li>● Maintain awareness of FEMA financial guidance, including standard equipment rates, labor categories, preexisting contracts, indirect costs, fringe benefits, and established vendor lists</li> <li>● Identify and organize data relevant to grant or reimbursement applications</li> </ul>	E, F, I, J		
<p><b>48.</b> Coordinate with organizational representatives to identify additional discipline-specific funding sources.</p>	E, F, I, J		
<p><b>49.</b> Monitor and verify costs and expenditures by reviewing requests, invoices, time cards, activity logs, and other available documentation or resources:</p> <ul style="list-style-type: none"> <li>● Track jurisdictional burn rate</li> </ul>	E, F, I		

***Task Category: Advise EOC leadership and staff on financial matters associated with jurisdictional activities***

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>50.</b> Review resource requests with resource management personnel to verify understanding of request and provide input on course of action:</p> <ul style="list-style-type: none"> <li>● Suggest cost-efficient alternatives to obtaining requested resources, as appropriate</li> </ul>	E, F, I		
<p><b>51.</b> Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.</p>	E, F, I		
<p><b>52.</b> Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.</p>	E, F, I		
<p><b>53.</b> Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.</p>	E, F, I		