



NATIONAL QUALIFICATION SYSTEM (NQS)

POSITION TASK BOOK
FOR THE POSITION OF

OPERATIONS SPECIALIST

Version: March 2024

Check the appropriate position type:

Single Type

(All WVEMD SEOC positions are Single Type)

POSITION TASK BOOK ASSIGNED TO:
TRAINEE'S NAME:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
POSITION TASK BOOK INITIATED BY:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
POSITION TASK BOOK WAS INITIATED:
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
Position Specific	E/L 958	NIMS ICS All-Hazards Position Specific, Operations Section Chief

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

Task Category: Collect and store documents and records

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
24. Follow document and records management procedures and policies.	E, F, I		
25. Brief EOC personnel on document management processes and related staff responsibilities.	E, F, I		
26. Monitor, review, and assess activity logs, charts, and records for completeness and follow up on any that are incomplete.	E, F, I		
27. Collect and package information for after action review.	E, F, I		

Task Category: Provide documents and records upon request

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
28. Monitor compliance with information management processes and procedures.	E, F, I		
29. Perform real-time documentation collection and storage.	E, F, I		
30. Archive documents such as activity logs, charts, and records.	E, F, I		
31. Respond to internal requests for archived information, such as: <ul style="list-style-type: none"> ● Lessons learned from past disasters, incidents, and events ● Previous incident information 	E, F, I		

Task Category: Gather data and information

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
32. Collect and monitor data and information: <ul style="list-style-type: none"> ● Sources include Incident Action Plan (IAP), on-scene incident reports, EOC personnel, National Weather Service, jurisdictional liaisons, fusion centers, traditional media, social media, and others ● Content includes demographic, damage assessment, infrastructure, supply chain, and geographic data and information 	E, F, I, J		
33. Coordinate information with EOC public affairs personnel and the Joint Information Center (JIC)/Joint Information System (JIS): <ul style="list-style-type: none"> ● Receive information from JIC/JIS ● Provide information to JIC/JIS 	E, F, I		
34. Coordinate with EOC personnel to gather information.	E, F, I		

Task Category: Analyze data and information

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
35. Establish and implement processes for estimating cascading effects of action or inaction: <ul style="list-style-type: none"> ● Evaluate potential consequences and mitigation actions ● Identify trends ● Engage technical specialists 	E, F, I		
36. Use demographic information to inform analysis: <ul style="list-style-type: none"> ● Cultural diversity ● Potential vulnerabilities ● Damage assessment ● Specific service needs, such as: <ul style="list-style-type: none"> ○ Individuals with disabilities and other access and functional needs ○ Individuals with critical transportation needs 	E, F, I		
37. Analyze information: <ul style="list-style-type: none"> ● Establish and implement procedures for verifying, organizing, prioritizing, and tracking information ● Convert raw data into information ● Identify and address misinformation ● Verify and analyze input for critical information ● Clarify incomplete information ● Identify incident-specific essential elements of information and critical information requests 	E, F, I		
38. Recognize incident-specific critical information to be disseminated immediately.	E, F, I		
39. Prepare situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		

Task Category: Disseminate information

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
40. Establish and implement a process for developing and disseminating situational information at regular intervals: <ul style="list-style-type: none"> ● Obtain approval for distribution in accordance with policies and procedures ● Determine distribution lists ● Determine methods for distribution 	E, F, I		
41. Follow processes for identifying, verifying, and disseminating critical information: <ul style="list-style-type: none"> ● Coordinate with public affairs to disseminate information externally 	E, F, I		
42. Display within the EOC situational information and data about significant events.	E, F, I		
43. Use visualizations such as graphs, photographs, and maps to graphically depict information.	E, F, I		

44. Use mapping/geospatial data and sources, including Geographic Information Systems, web-based maps, and paper maps.	E, F, I, J		
45. Present and distribute situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		
46. Ensure proper security when sharing sensitive, classified, or protected information.	E, F, I		

Task Category: Understand potential sources

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

Task Category: Track resources

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
57. Demonstrate knowledge of EOC and field operations resource tracking processes.	E, F, I, T		
58. Monitor and track resources and supporting logistics.	E, F, I		
59. Update requestor on request status, estimated time of arrival, and related logistical details: ● Verify that provided information meets incident needs	E, F, I		
60. Establish communication channels to maintain resource status.	E, F, I		
61. Track resources from initial request through: ● Hand-off to incident, or Demobilization (for resources that remain under EOC management)	E, F, I		
62. Anticipate, recognize, plan for, and address resource drawdown levels for resources that remain under EOC management.	E, F, I		
63. 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
64. Demonstrate knowledge of jurisdictional/organizational procurement policies: ● Standard operations ● Emergency operations ● Cost-tracking processes and requirements: ○ Preapproved vendors ○ On-call contracts	E, F, I, J		
65. Demonstrate awareness of fiscal implications and requirements when: ● Requesting or activating resources ● Operating under various types of emergency or disaster declarations ● Receiving external, Federal, or state assistance ● Using volunteer resources	E, F, I, J, T		
66. Ensure policies and procedures are in place to comply with applicable reimbursement requirements.	E, F, I, J		
67. Seek information on the financial requirements of incoming resources, such as: ● National Guard assets ● Mutual aid resources	E, F, I		
68. Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.	E, F, I, J		
69. Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.	E, F, I		

<p>70. Collect, track, and document data related to funding and expenses:</p> <ul style="list-style-type: none"> ● Monitor compensation processes for time and pay ● Coordinate with risk management on costs involved in workers' compensation claims, damage claims, tort claims, and other incident-related claims ● Implement plan to coordinate and manage monetary donations ● Coordinate, collect, and track volunteer time and maintain documentation for potential reimbursement requests ● Identify and follow any use limitations for various funding sources ● Maintain awareness of FEMA financial guidance, including standard equipment rates, labor categories, preexisting contracts, indirect costs, fringe benefits, and established vendor lists ● Identify and organize data relevant to grant or reimbursement applications 	E, F, I, J		
<p>71. Coordinate with organizational representatives to identify additional discipline-specific funding sources.</p>	E, F, I, J		
<p>72. 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"> ● Track jurisdictional burn rate 	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>73. 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"> ● Suggest cost-efficient alternatives to obtaining requested resources, as appropriate 	E, F, I		
<p>74. 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>75. Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.</p>	E, F, I		
<p>76. Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.</p>	E, F, I		