Chapter 4:
EMRS Task Module

The EMRS' Task Module consists of a set of electronic forms to use in documenting all the non-premises- and non-investigation-related tasks that are needed during an Incident Command. These tasks are typically the "behind-the-scenes" tasks that help keep the Incident Command and all its resources running smoothly. Examples of these kinds of tasks include:

- Setting up internal and external meetings for various groups.
- Establishing operational policies.
- Writing a huge variety of plans (i.e., action plans, evacuation plans, safety plans).
- Reminding personnel to frequently requisition supplies.
- Providing updates to local/regional/national media about the Incident Command's status and progress.

This list goes on and on…and always does !

Chapter Contents

Section 1: Meeting Tracking Form

Form's purpose:

Used to keep track of meeting times, rooms and equipment for groups or individuals who are participating in an Incident Command related meetings.

Pre-requisite(s):

None.

To access this form:

To access a new Meeting Tracking Form, choose either *Method A* or *Method B* below:

Method A:

1. Log directly into the EMRS Task Module instance that has been set up for your Incident Command.
2. On the Task Management Database – Main Menu screen, click on Enter New Meeting Tracking.

Method B:

1. Log directly into the EMRS Administration or Investigation Module instance that has been set up for your Incident Command.
2. On the Main Menu screen for this module, click on TASKS.
3. On the Task Management Database – Main Menu screen, click on Enter New Meeting Tracking .

To access an existing Meeting Tracking Form, choose either *Method C* or *Method D* below:

***Method C*:**

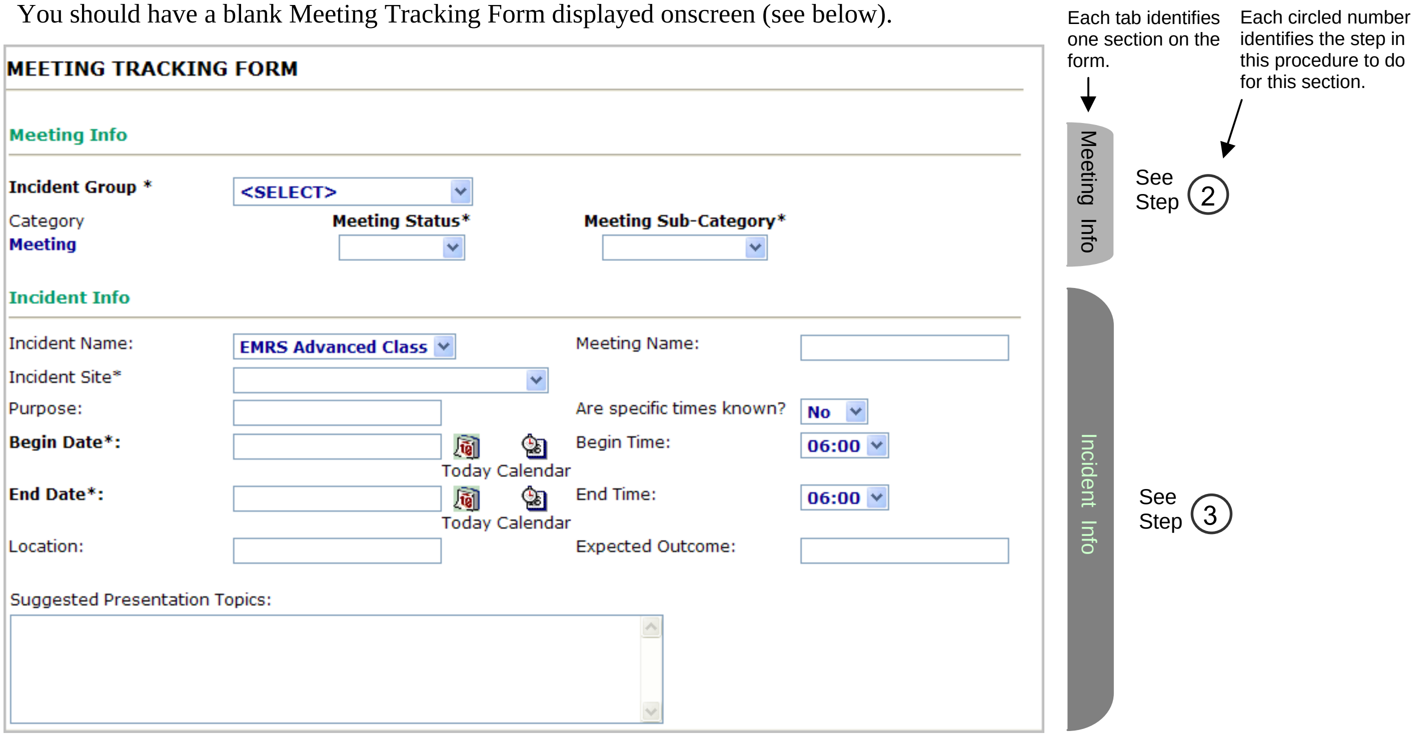
1. Log directly into the EMRS Task Module instance that has been set up for your Incident Command.
2. On the Task Management Database – Main Menu screen, click on List All Meetings .
3. An All Meetings list appears. Find the Meeting Tracking Form you want within this list using any of the following methods:
   - Click on Previous and Next to move from one screen to another within the list.
   - Click on Expand and Collapse to display or hide all of the details in the list.
   - Click on and to display or hide the details next to an individual record.
   - Click on the arrows next to each column heading (**Incident**, **Name**, **Coordinator**, etc.) to sort the contents of that column.
4. To open the Meeting Tracking Form you want, click on its link in the **Name** column.

***Method D*:**

1. Log directly into the EMRS Administration or Investigation Module instance that has been set up for your Incident Command.
2. On the Main Menu screen for this module, click on TASKS.
3. On the Task Management Database – Main Menu screen, click on List All Meetings.
4. A Pending Tasks by Assignment list appears. Find the Task Tracking Form you want within this list using any of the following methods:
   - Click on Previous and Next to move from one screen to another within the list.
   - Click on Expand and Collapse to display or hide all of the details in the list.
   - Click on and to display or hide the details next to an individual record.
   - Click on the arrows next to each column heading (**Incident**, **Name**, **Coordinator**, etc.) to sort the contents of that column.
5. To open the Meeting Tracking Form you want, click on its link in the **Name** column.

Data-Entry Procedure

1 You should have a blank Meeting Tracking Form displayed onscreen (see below).



2 **Meeting Info Section** – Complete this section according to the guidelines below.

* Required field

Meeting Tracking Form	
Meeting Info Section	
Data Field	**Description**
Incident Group ✶	Determines who will be able to view this Meeting Tracking Form. Usually based on the State in which the investigation/Incident Command is headquartered, and will include members of the group who have been determined to have a need to know. Use this data field's LOV to make a selection.
Category	Defaults to **Meeting**.
Meeting Status ✶	Current status of the meeting being documented on this form. Use this data field's LOV to make a selection. The choices are: **ASSIGNED** – An individual/team/group/unit has been assigned to set up this meeting. **COMPLETED** – - The individual/team/group/unit has finished setting up this meeting. - The Meeting Tracking Form has been edited by having details entered on it. The form's status has been manually changed to **Completed**.
Meeting Sub-Category ✶	Category for type of audience or attendees for this meeting. Use this data field's LOV to make a selection. The choices are: **Area** – Area Office, etc. **Leave** – Meeting concerning Leave Policies. (Additional categories could be added.) **National** – National-level Meeting. **Public** – Meeting for the Public. **Regional** – Regional Office, etc. **Special Group** – Meeting for a Special Group. **Working Group** – Meeting for a Working Group.

3 **Incident Info Section** – Complete this section according to the guidelines below.

* Required field

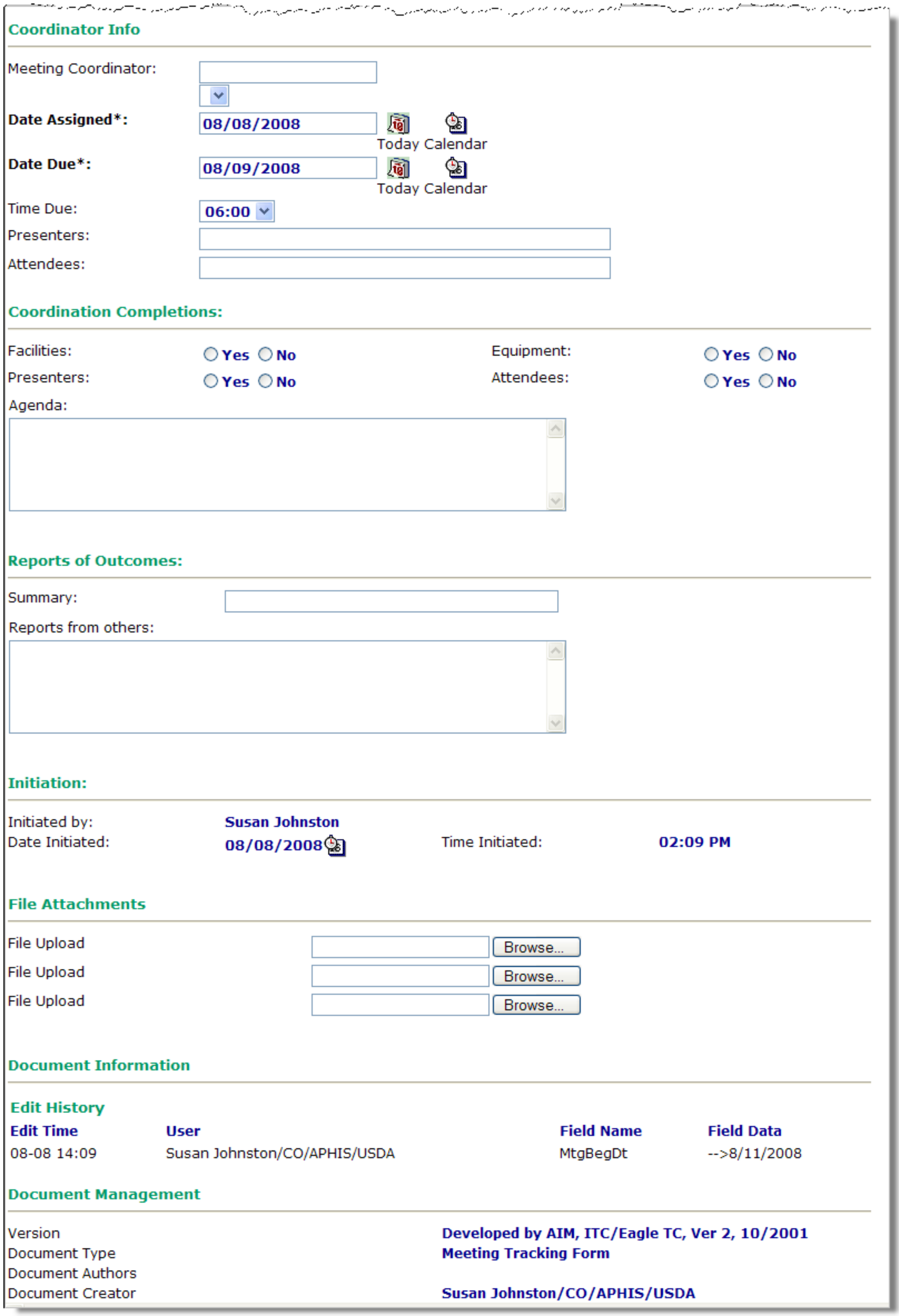
Meeting Tracking Form	
Incident Info Section	
Data Field	**Description**
Incident Name	Name of the overall Incident (Category or Event) for this Investigation. -- *For a routine FAD investigation*, the FAD database has only one incident called "FAD Investigations". -- For a *tracing or outbreak situation* (such as Brucellosis Tracing or Tuberculosis), its database will usually have multiple incidents to choose from. *Note*: If you do not know which incident your investigation is associated with, contact EMRS Support. Use this data field's LOV to make a selection.
Meeting Name	Short label that identifies the meeting's scope, intention, and/or audience. Manually enter this label.
Incident Site ✶	State or geographic location where the investigation/Incident Command is headquartered, or where data for the investigation/Incident Command is being managed. Routine FAD and Tracing databases usually have only one location per state. May be auto-filled according to the value you specified in the **Access Group** data field. To change this value, use the data field's LOV.
Purpose	Description of the meeting's primary objectives. Manually enter this description.
Are specific times known?	**Yes** = The meeting's starting and ending time/dates are finalized and known in advance. **No** = The meeting's starting and ending time/dates are not finalized and known in advance. (This data field can also be used to enter information and make preparation for a meeting not yet scheduled.)
Begin Date ✶	First day of the meeting. There are three ways to enter this date: • Click on the Today icon ( ) to enter the current date. • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Begin Time	Official starting time on the first day of this meeting. Use this data field's LOV to make a selection.
End Date ✶	Final day of the meeting. There are three ways to enter this date: • Click on the Today icon ( ) to enter the current date. • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
End Time	Official ending time on the last day of this meeting. Use this data field's LOV to make a selection.
Location	Physical location where the meeting will be held. Manually enter this information.
Expected outcome	High-level goals and/or deliverables that should be achieved or created at the end of the meeting. Manually enter this information.
Suggested Presentation Topics	Preliminary agenda for this meeting. Manually enter this information (or attach the agenda as a separate document to this form).

4 After entering all of your data in this form, click on SAVE .

The form refreshes, displays the data you just entered, and adds the following new sections: **Coordinator Info**, **Coordination Completions**, **Reports of Outcomes**, **Initiation**, **File Attachments**, **Document Information**, **Edit History**, and **Document Management**.

DRAFT

5 Click on EDIT to continue working in this Meeting Tracking Form (shown below).



Coordinator Info

Meeting Coordinator:

Date Assigned*: 08/08/2008 Today Calendar

Date Due*: 08/09/2008 Today Calendar

Time Due: 06:00

Presenters:

Attendees:

Coordination Completions:

Facilities:	Yes No	Equipment:	Yes No
Presenters:	Yes No	Attendees:	Yes No

Agenda:

Reports of Outcomes:

Summary:

Reports from others:

Initiation:

Initiated by:	Susan Johnston		
Date Initiated:	08/08/2008	Time Initiated:	02:09 PM

File Attachments

File Upload Browse...

File Upload Browse...

File Upload Browse...

Document Information

Edit History

Edit Time	User	Field Name	Field Data
08-08 14:09	Susan Johnston/CO/APHIS/USDA	MtgBegDt	-->8/11/2008

Document Management

Version	Developed by AIM, ITC/Eagle TC, Ver 2, 10/2001
Document Type	Meeting Tracking Form
Document Authors	
Document Creator	Susan Johnston/CO/APHIS/USDA

Coordinator Info — See Step 6

Coord Completions — See Step 7

Reports of Outcomes — See Step 8

Initiation — See Step 9

File Attach — See Step 10

Edit History — See Step 11

Doc Mgmt — See Step 12

6 **Coordinator Info Section** – Complete this section according to the guidelines below.

* Required field

Meeting Tracking Form	
Coordinator Info Section	
Data Field	**Description**
Meeting Coordinator	Last and first name of the individual who is being assigned to set up the meeting documented on this Meeting Tracking Form. 1. Start typing the name in the data field next to the **Meeting Coordinator** label. 2. When the EMRS recognizes enough letters, it will display possible name matches in the data field underneath. 3. Use this second data field's LOV to select the name of the appropriate individual.
Date Assigned ✶	Date on which this individual was assigned the task of setting up the meeting. There are three ways to enter this date: • Click on the Today icon ( ) to enter the current date. • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Date Due ✶	Date on which this individual is expected to have finished setting up the meeting. There are three ways to enter this date: • Click on the Today icon ( ) to enter the current date. • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Time Due	Time when this individual is expected to have finished setting up the meeting. Use the data field's LOV to make a selection.
Presenters	List of names of any presenters for this meeting. Manually enter this information.
Attendees	List of names of any attendees for this meeting. Manually enter this information.

7 **Coordination Completions Section** – Complete this section according to the guidelines below.

* Required field

Meeting Tracking Form	
Coordination Completions Section	
Data Field	**Description**
Facilities	**Yes** = All arrangements for booking and setting up the meeting facility have been completed. **No** = All arrangements for booking and setting up the meeting facility have not yet been completed.
Equipment	**Yes** = All necessary equipment has been requisitioned and set up at the meeting facility. **No** = All necessary equipment has not yet been requisitioned and set up at the meeting facility.
Presenters	**Yes** = All presenters have been booked and confirmed for the meeting. **No** = All presenters have not yet been booked and confirmed for the meeting.
Attendees	**Yes** = All attendees have been invited and confirmed for the meeting. **No** = All presenters have not yet been invited and confirmed for the meeting.
Agenda	Final agenda of topics to be covered at the meeting. Manually enter this information (or attach the agenda as a separate document to this form).

8 **Reports of Outcomes Section** – Complete this section according to the guidelines below.

* Required field

Meeting Tracking Form	
Reports of Outcomes Section	
Data Field	**Description**
Summary	Summarizes the meeting's outcome. Manually enter this information.
Reports from others	General perceptions or evaluations provided by the attendees. Manually enter this information.

9 **Initiation Section** (view-only) – Is auto-filled with data when this form is created.

* Required field

Meeting Tracking Form	
Initiation Section	
Data Field	**Description**
Initiated by	Name of the person who submitted the meeting task.
Date Initiated	Date on which the meeting task was submitted.
Time Initiated	Time when the meeting task was submitted.

10 **File Attachments Section** – Use to associate other documents with the Meeting Tracking Form.
Examples of such attachments can be: a brochure/flyer announcing a meeting with the general public/animal producers, invoices for meeting room rentals, catering instructions, driving directions to the meeting location, etc.
Tip: To attach pictures/photographs, first embed them within a Microsoft Word or PDF document.

To attach a file, do the following:

a. Next to a blank **File Upload** data field, click on Browse... .
b. A Choose File pop-up window appears. Use it to navigate to the appropriate online directory where the file is stored.
c. When you find the file you want to attach, double-click on its name.
d. The Choose File pop-up window closes. You now see this file's full pathname in the **File Upload** data field.
   Note: Whenever you attach files, you will first need to save the form in order to open/view these attachments.

11 **Document Information/Edit History Section** (view-only) – Displays information about recent changes that have been made to this form.

12 **Document Management Section** (view-only) – Displays information about the persons who created/edited this form.

13 After you have entered all of your data into this form, click on SAVE again.

Meeting Tracking Form – Next Steps

At this point, you can do any of the following tasks:

- Use any of the Grey Action Buttons:

EDIT	Click, to re-open this form in data-entry mode. After making your changes, click on SAVE.
MAIL IT	Click, to open a new memo within the Lotus Notes email application. The new memo is auto-filled with a URL for this Meeting Tracking Form and is ready for you to email to the recipients you select from your Address Book.
NEW MEETING TRACKING FORM	Click, to open a new Meeting Tracking Form.
SIMILAR MEETING	Click, to copy the current Meeting Tracking Form with any data in it. In the copy of this form, edit any data fields as needed to make this copy unique. *Note*: This duplication method saves time and eliminates redundant data-entry by enabling you to quickly create several similar Meeting Tracking Forms. You then only need to edit the data fields that are different on each one. *Example*: You were asked to schedule three weekly meetings for the Operation Unit. Complete a Meeting Tracking Form for the first meeting. Then copy this form two times to use for the other meetings.
HELP	Click, to display a Help Document about this form. Click on ✕ to close this Help Document.
REQUEST DELETION	Click, to submit a request to delete this form and all descendent documents created from it.
DELETE DOC	Click, to permanently delete this form and all descendent documents created from it.

- Use the WelcomePage -> **Meeting Tracking Form** breadcrumb trail to navigate back to the Task Management Database Main Menu (Welcome Page).

- Use the **Meeting Info** | **Coordinators** | **Distribution & Changes** | **All Sections** Navigation Bar to navigate within the Meeting Tracking Form.

  Click once on a specific tab to go to that section, or click once on the **All Sections** tab to display the entire form onscreen. (You may need to scroll vertically or horizontally to see some parts of the form.)

- View the data on this form in alternate report formats by using the Category/View feature (see right).

  a. In the **Category** data field, select **Meetings**.

  b. In the **View** data field, select a format for this report.

  c. Click on the symbol to generate this report.

Section 2: Task Tracking Form

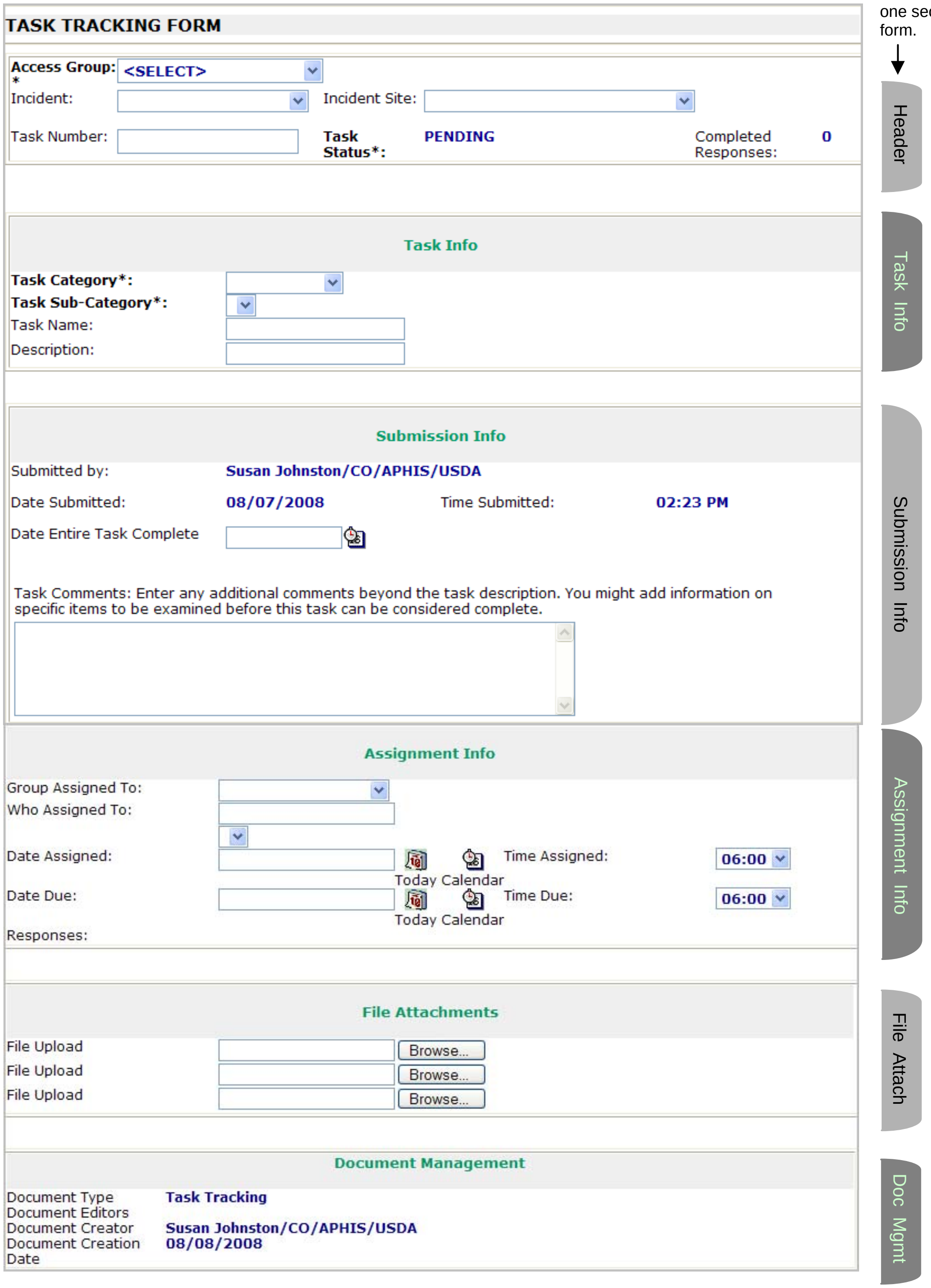
Form's purpose:	Used to keep track of tasks assigned to groups or individuals who are participating in an Incident Command. *Note*: Use this form to document Incident Command activities that are not premises- or investigation-based. Such activities are typically "behind-the-scenes" type tasks, such as ordering supplies, writing daily action plans or administrative policies for use by Incident Command staff, etc.
Pre-requisite(s):	None.
To access this form:	**To access a new Task Tracking Form, choose either *Method A* or *Method B* below:** ***Method A***: 1. Log directly into the EMRS Task Module instance that has been set up for your Incident Command. 2. On the Task Management Database – Main Menu screen, click on New Task Tracking Form . ***Method B***: 1. Log directly into the EMRS Administration or Investigation Module instance that has been set up for your Incident Command. 2. On the Main Menu screen for this module, click on TASKS . 3. On the Task Management Database – Main Menu screen, click on New Task Tracking Form . **To access an existing Task Tracking Form, choose either *Method C* or *Method D* below:** ***Method C*:** 1. Log directly into the EMRS Task Module instance that has been set up for your Incident Command. 2. On the Task Management Database – Main Menu screen, click on List of Pending Tasks . 3. A Pending Tasks by Assignment list appears. Find the Task Tracking Form you want within this list using any of the following methods: • Click on Previous and Next to move from one screen to another within the list. • Click on Expand and Collapse to display or hide all of the details in the list. • Click on and to display or hide the details next to an individual record. • Click on the arrows next to each column heading (**Assigned To**, **Category**, **Topic**, etc.) to sort the contents of that column. 4. To open the Task Tracking Form you want, click on its link in the **Topic** column. ***Method D*:** 1. Log directly into the EMRS Administration or Investigation Module instance that has been set up for your Incident Command. 2. On the Main Menu screen for this module, click on TASKS . 3. On the Task Management Database – Main Menu screen, click on List of Pending Tasks . 4. A Pending Tasks by Assignment list appears. Find the Task Tracking Form you want within this list using any of the following methods: • Click on Previous and Next to move from one screen to another within the list. • Click on Expand and Collapse to display or hide all of the details in the list. • Click on and to display or hide the details next to an individual record. • Click on the arrows next to each column heading (**Assigned To**, **Category**, **Topic**, etc.) to sort the contents of that column. 5. To open the Task Tracking Form you want, click on its link in the **Topic** column.

Data-Entry Procedure

1 You should have a blank Task Tracking Form displayed onscreen (shown below).

Each tab identifies one section on the form.

Each circled number identifies the step in this procedure to do for this section.


TASK TRACKING FORM

Access Group: * <SELECT>

Incident: | Incident Site:

Task Number: | Task Status*: PENDING | Completed Responses: 0

Task Info

Task Category*:

Task Sub-Category*:

Task Name:

Description:

Submission Info

Submitted by: Susan Johnston/CO/APHIS/USDA

Date Submitted: 08/07/2008 | Time Submitted: 02:23 PM

Date Entire Task Complete

Task Comments: Enter any additional comments beyond the task description. You might add information on specific items to be examined before this task can be considered complete.

Assignment Info

Group Assigned To:

Who Assigned To:

Date Assigned: Today Calendar | Time Assigned: 06:00

Date Due: Today Calendar | Time Due: 06:00

Responses:

File Attachments

File Upload Browse...

File Upload Browse...

File Upload Browse...

Document Management

Document Type: Task Tracking

Document Editors

Document Creator: Susan Johnston/CO/APHIS/USDA

Document Creation Date: 08/08/2008

Header: See Step 2

Task Info: See Step 3

Submission Info: See Step 4

Assignment Info: See Step 5

File Attach: See Step 6

Doc Mgmt: See Step 7

2 **Header Section** – Complete this section according to the guidelines below.

* Required field

Task Tracking Form	
Header Section	
Data Field	**Description**
Access Group ✶	Determines who will be able to view this Task Tracking Form and any associated Task Response Forms. Usually based on the State in which the investigation/Incident Command is headquartered, and will include members of the group who have been determined to have a need to know. Use this data field's LOV to make a selection.
Incident	Name of the overall Incident (Category or Event) for this Investigation. -- *For a routine FAD investigation*, the FAD database has only one incident called "FAD Investigations". -- For a *tracing or outbreak situation* (such as Brucellosis Tracing or Tuberculosis), its database will usually have multiple incidents to choose from. *Note*: If you do not know which incident your investigation is associated with, contact EMRS Support. Use this data field's LOV to make a selection.
Incident Site	State or geographic location where the investigation/Incident Command is headquartered, or where data for the investigation/Incident Command is being managed. Routine FAD and Tracing databases usually have only one location per state. May be auto-filled according to the value you specified in the **Access Group** data field. To change this value, use the data field's LOV.
Task Number	Unique number that identifies this task from all other tasks being performed by the same Group. Manually enter this value.
Task Status ✶	Current status of this Task Tracking Form. The choices are: **PENDING** – No one has been assigned this task yet. **ASSIGNED** – An individual/team/group/unit has been assigned to do this task. **COMPLETED** – - The individual/team/group/unit has completed this task. - At least one Task Response Form has been completed for this task. - On the Task Response Form, a **Date this portion completed** value has been entered.
Completed Responses	Number of completed Task Response Forms that are associated with this Task Tracking Form. Auto-filled with the total number of completed Task Response Forms that are associated with this Task Tracking Form. *Note*: To be considered "completed", a Task Response Form must have a **Date this portion completed** value entered on it.

3 Task Info Section – Complete this section according to the guidelines below.

* Required field

<table>
<tr><th colspan="2">Task Tracking Form</th></tr>
<tr><th colspan="2">Task Info Section</th></tr>
<tr><th>Data Field</th><th>Description</th></tr>
<tr><td>Task Category ✶</td><td>General type of task being documented on this Task Tracking Form.
Use this data field’s LOV to make a selection. The current choices are:
<table>
<tr><th>Category</th><th>Description and/or Examples</th></tr>
<tr><td>Action</td><td>One-time only task that has begin/end dates.</td></tr>
<tr><td>Information</td><td>Task type that gathers, organizes, validates, and/or delivers information to a specific audience group.</td></tr>
<tr><td>Policy</td><td>Task type that brainstorms, discusses, tests, and/or finalizes a policy/standard/practice for a specific need/goal.</td></tr>
<tr><td>Resources</td><td>Task type that recruits, acquires, rents, leases, purchases, inspects, tracks, and/or maintains a specific resource.</td></tr>
</table>
</td></tr>
<tr><td>Task Sub-Category ✶</td><td>A more specific task type.
Use this data field’s LOV to make a selection. The current choices are:
<table>
<tr><th>Category</th><th>Sub-Category</th><th>Description and/or Examples</th></tr>
<tr><td>Action</td><td>Develop Plan
Develop SOP
Explore Options
Make Contact
Obtain Funds
Schedule Meeting</td><td>Incident Action Plan, Contingency Plan, Medevac Plan.
Communications SOP; Depopulation SOP; Diagnostic SOP.
Evaluate alternative scenarios in order to prevent or rescue something.
Contact a specific individual, premises, or vendor.
Apply, requisition, approve, and disburse funding for incident activities.
Set up a meeting time/location/date for a specific purpose.</td></tr>
<tr><td>Information</td><td>For State
Internal
Maps
Media
Personnel
Producers
Public
Technical
Veterinarians</td><td>Provides responses to State Offices.
Includes members of the Incident Command task force.
Maps to be developed.
Provides information to newspaper, tv, radio, and Internet inquiries.
Provides Information to employees.
Hold informational meetings for local ranchers/breeders/farmers.
Provides Information for public release.
Includes scientists, IT Specialists, surveyors, GIS specialists, etc.
Includes AVICs, private vets, Federal vets, FADDs, etc.</td></tr>
<tr><td>Policy</td><td>Administrative Policy
General Policy
Media Policy

Technical Policy</td><td>Rules for work environment, employee conduct, work hours, pay, etc.
Rules for neighborhood security, parking, etc.
Rules for working with all media outlets/formats (newspaper, tv, radio, Internet, magazines,etc.).
Rules for disease control/management/elimination.</td></tr>
<tr><td>Resources</td><td>Equipment
Facilities
Personnel
Supplies
Transportation</td><td>Includes clothing and tools for safety and operational tasks.
Includes storage, maintenance, and working buildings.
Includes all members of the Incident Command task force.
Includes office-related supplies.
Includes vehicles, fuel, etc.</td></tr>
</table>
</td></tr>
<tr><td>Task Name</td><td>A short phrase or label that identifies the task.
Manually enter this information.</td></tr>
<tr><td>Description</td><td>A longer narrative or description about the task.
Manually enter this information.</td></tr>
</table>

4 Submission Info Section – Complete this section according to the guidelines below.

* Required field

Task Tracking Form	
Submission Info Section	
Data Field	**Description**
Submitted by	Name of the person who completed this Task Tracking Form. Auto-filled with data associated with the current user.
Time Submitted	Time when this Task Tracking Form was most recently saved into the EMRS. Auto-filled with data associated with the current user.

Task Tracking Form	
Submission Info Section	**continued**
Data Field	**Description**
Date Submitted	Date on which this Task Tracking Form was started. Auto-filled with data associated with the current user.
Date Entire Task Complete	Date on which all portions of the task have been completed by all assigned task members. There are two ways to enter this date: • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Task Comments	Additional instructions, requirements, and verification work. Manually enter this information.

5 **Assignment Info Section** – Complete this section according to the guidelines below.

* Required field

Task Tracking Form	
Assignment Info Section	
Data Field	**Description**
Group Assigned To	Name of an Incident Command unit/team/group that is responsible for performing the task described on this Task Tracking Form. Use this data field's LOV to make a selection.
Who Assigned To	Last and first name of the individual who will supervise or perform this task. 1. Start typing the name in the data field next to the **Who Assigned To** label. 2. When the EMRS recognizes enough letters, it will display possible name matches in the data field underneath. 3. Use this second data field's LOV to select the name of the appropriate individual.
Date Assigned	Date on which the appropriate person/team was personally notified of this task assignment. OR Date on which the task was recorded on this Task Tracking Form as being assigned to the appropriate person/group. There are three ways to enter this date: • Click on the Today icon ( ) to enter the current date. • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Time Assigned	Time when the appropriate person/group was personally notified of this task assignment. OR Time when the task was recorded on this Task Tracking Form as being assigned to the appropriate person/team. Use this data field's LOV to make a selection.
Date Due	Date on which the task is required to be completed. There are three ways to enter this date: • Click on the Today icon ( ) to enter the current date. • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Time Due	Time when the task is required to be completed. Use this data field's LOV to make a selection.
Responses	Auto-filled with the number of completed Task Response Forms that are associated with this Task Tracking Form.

6 **File Attachments Section** – Use to associate other documents with the Task Tracking Form.
Examples of such attachments can be: digital maps showing local supplier locations, draft of a plan/SOP that was written as part of this task, a brochure/flyer announcing a meeting with the general public/animal producers, scanned requisition forms for new supplies to be ordered, etc.
Tip: To attach pictures/photographs, first embed them within a Microsoft Word or PDF document.

To attach a file, do the following:

a. Next to a blank **File Upload** data field, click on [Browse...] .
b. A Choose File pop-up window appears. Use it to navigate to the appropriate online directory where the file is stored.
c. When you find the file you want to attach, double-click on its name.
d. The Choose File pop-up window closes. You now see this file's full pathname in the **File Upload** data field.
   Note: Whenever you attach files, you will first need to save the form in order to open/view these attachments.

7 **Document Management Section** (view-only) – Displays information about the persons who created/edited this form.

8 After entering all of your data in this form, click on [SAVE] .

The form refreshes, displays the data you just entered, and adds a new **Edit History Section**.

9 **Edit History Section** (view-only) – Displays information about recent changes that have been made to this form.

Task Tracking Form – Next Steps

At this point, you can do any of the following tasks:

- Use any of the Grey Action Buttons:

EDIT	Click, to re-open this form in data-entry mode. After making your changes, click on SAVE.
NEW TASK TRACKING FORM	Click, to open a new Task Tracking Form.
SIMILIAR TASK	Click, to copy the current Task Tracking Form with any data in it. In the copy of this form, edit any data fields as needed to make this copy unique. *Note*: This duplication method saves time and eliminates redundant data-entry by enabling you to quickly create several similar Task Tracking Forms. You then only need to edit the data fields that are different on each one. *Example*: You were asked to write three Action Plans. Complete a Task Tracking Form for the first Action Plan. Then copy this form two times to use for the other two Action Plan assignments.
NEW TASK RESPONSE	Click, to open a new Task Response Form. This form will be auto-filled with data from the originating Task Tracking Form.
MAIL IT	Click, to open a new memo within the Lotus Notes email application. The new memo is auto-filled with a URL for this Task Tracking Form and is ready for you to email to the recipients you select from your Address Book.
HELP	Click, to display a Help Document about this form. Click on ☒ to close this Help Document.
REQUEST DELETION	Click, to submit a request to delete this form and all descendent documents created from it.
DELETE DOC	Click, to permanently delete this form and all descendent documents created from it.

- Use the WelcomePage -> Task Tracking breadcrumb trail to navigate back to the Task Management Database Main Menu (Welcome Page).

- Use the Task Info | Submission Info | Assignment Info | Files And History | Doc Management | All Sections Navigation Bar to navigate within the Task Tracking Form.

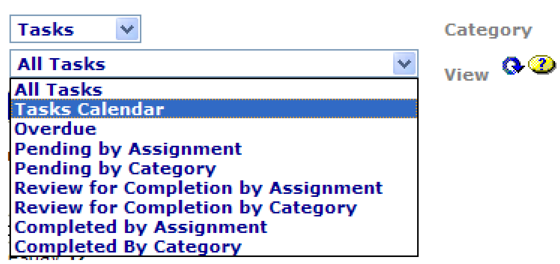
  Click once on a specific tab to go to that section, or click once on the **All Sections** tab to display the entire form onscreen. (You may need to scroll vertically or horizontally to see some parts of the form.)

- View the data on this form in alternate report formats by using the Category/View feature (see right).

  a. In the **Category** data field, select **Tasks**.

  b. In the **View** data field, select a format for this report.

  c. Click on the symbol to generate this report.



Section 3: Task Response Form

Form's purpose:	Used to respond to tasks assigned to individuals/groups that are working at an Incident Command.
Pre-requisite(s):	Create this form only after you have already started a Task Tracking Form.

To access this form:

To access a new Task Response Form, choose either *Method A* or *Method B* below:

Method A:

1. Log directly into the EMRS Task Module instance that has been set up for your Incident Command.
2. On the Task Management Database – Main Menu screen, click on New Task Tracking Form.
3. At minimum, complete the required data fields on the Task Tracking Form. Then save the form.
4. Click on NEW TASK RESPONSE .

Method B:

1. If you are already working in a Task Tracking Form, save it.
2. Click on NEW TASK RESPONSE .

To access an existing Task Response Form, choose either *Method C* or *Method D* below:

***Method C*:**

1. If you are already working in a Task Tracking Form, save it.
2. In the Assignment Info Section, click on the appropriate link in the **Assigned To** column. This opens the Task Response Form.

***Method D*:**

1. On the Task Management Database – Main Menu screen, click on List of Pending Tasks .
2. A Pending Tasks by Assignment list appears. Find the Task Tracking Form you want within this list using any of the following methods:
   - Click on Previous and Next to move from one screen to another within the list.
   - Click on Expand and Collapse to display or hide all of the details in the list.
   - Click on and to display or hide the details next to an individual record.
   - Click on the arrows next to each column heading (**Assigned To**, **Category**, **Topic**, etc.) to sort the contents of that column.
3. To open the Task Tracking Form you want, click on its link in the **Topic** column.
4. On the Task Tracking Form in the Assignment Info Section, click on the appropriate link in the **Assigned To** column. This opens the Task Response Form.

Data-Entry Procedure

1 You should have a partially-completed Task Response Form displayed onscreen (shown below).

Each tab identifies one section on the form.

Each circled number identifies the step in this procedure to do for this section.

TASK RESPONSE FORM

Task Info — Header — See Step 2

Access Group *	**EMRS Access**	Incident Site:	**CEAH**
Task Category	**Action**	Incident Name:	**Training**
Task Sub-Category	**Develop Plan**	Task Name:	**SOP - IC Staff Orientation**
Status Description		Description:	**SOP - Day 2 orientation activities for new staff members to complete**

Task Response Info — Response — See Step 3

Response Category*:

Assignment Info — Assignment Info — See Step 4

Group Assigned To:	**Headquarters**		
Who Assigned To:	**Fraga, Catherine A (Aht -)**		
Date Assigned:	**08/01/2008**	Time Assigned:	**08:00**
Date Due:	**08/08/2008**	Time Due:	**14:30**
Date this portion completed:*	08/08/2008 Today Calendar	Time this portion completed:	06:00

Submission Info — Submission Info — See Step 5

Submitted by:	**Susan Johnston**		
Date Submitted:	08/08/2008	Time Submitted:	06:00

Enter information on how updated or how completed. (You may add digital photos, maps or other attachments using the File Upload Section below.)

File Attachments — File Attach — See Step 6

File Upload Browse...

File Upload Browse...

File Upload Browse...

Document Management — Doc Mgmt — See Step 7

Document Type	**Task Response**
Document Editors	**Susan Johnston/CO/APHIS/USDA**
Document Creator	**Susan Johnston/CO/APHIS/USDA**
Document Creation Date	**08/08/2008**

2 **Header Section** (view-only) – Is auto-filled with data from the originating Task Tracking Form.

* Required field

<table>
<tr><th colspan="2">Task Response Form</th></tr>
<tr><th colspan="2">Header Section</th></tr>
<tr><th>Data Field</th><th>Description</th></tr>
<tr><td>Access Group ✶</td><td>Determines who will be able to view this Task Response Form and the originating Task Tracking Form it is associated with. Usually based on the State in which the investigation/Incident Command is headquartered, and will include members of the group who have been determined to have a need to know.</td></tr>
<tr><td>Task Category ✶</td><td>Type of task being documented on this Task Tracking Form.
The current choices are:
<table>
<tr><th>Category</th><th>Description and/or Examples</th></tr>
<tr><td>Action</td><td>One-time only task that has begin/end dates.</td></tr>
<tr><td>Information</td><td>Task type that gathers, organizes, validates, and/or delivers information to a specific audience group.</td></tr>
<tr><td>Policy</td><td>Task type that brainstorms, discusses, tests, and/or finalizes a policy/standard/practice for a specific need/goal.</td></tr>
<tr><td>Resources</td><td>Task type that recruits, acquires, rents, leases, purchases, inspects, tracks, and/or maintains a specific resource.</td></tr>
</table></td></tr>
<tr><td>Task Sub-Category ✶</td><td>A more specific task type.
The current choices are:
<table>
<tr><th>Category</th><th>Sub-Category</th><th>Description and/or Examples</th></tr>
<tr><td>Action</td><td>Develop Plan
Develop SOP
Explore Options
Make Contact
Obtain Funds
Schedule Meeting</td><td>Incident Action Plan, Contingency Plan, Medevac Plan.
Communications SOP; Depopulation SOP; Diagnostic SOP.
Evaluate alternative scenarios in order to prevent or rescue something.
Contact a specific individual, premises, or vendor.
Apply, requisition, approve, and disburse funding for incident activities.
Set up a meeting time/location/date for a specific purpose.</td></tr>
<tr><td>Information</td><td>For State
Internal
Maps
Media
Personnel
Producers
Public
Technical
Veterinarians</td><td>Provides responses to State Offices.
Includes members of the Incident Command task force.
Maps to be developed.
Provides information to newspaper, tv, radio, and Internet inquiries.
Provides Information to employees.
Hold informational meetings for local ranchers/breeders/farmers.
Provides Information for public release.
Includes scientists, IT Specialists, surveyors, GIS specialists, etc.
Includes AVICs, private vets, Federal vets, FADDs, etc.</td></tr>
<tr><td>Policy</td><td>Administrative Policy
General Policy
Media Policy

Technical Policy</td><td>Rules for work environment, employee conduct, work hours, pay, etc.
Rules for neighborhood security, parking, etc.
Rules for working with all media outlets/formats (newspaper, tv, radio, Internet, magazines,etc.).
Rules for disease control/management/elimination.</td></tr>
<tr><td>Resources</td><td>Equipment
Facilities
Personnel
Supplies
Transportation</td><td>Includes clothing and tools for safety and operational tasks.
Includes storage, maintenance, and working buildings.
Includes all members of the Incident Command task force.
Includes office-related supplies.
Includes vehicles, fuel, etc.</td></tr>
</table></td></tr>
<tr><td>Status Description</td><td>Comments entered in the Description field on how task was completed or why task was not completed.</td></tr>
<tr><td>Incident Site</td><td>State or geographic location where the investigation/Incident Command is headquartered, or where data for the investigation/Incident Command is being managed. Routine FAD and Tracing databases usually have only one location per state.
May be auto-filled according to the value you specified in the Access Group data field.</td></tr>
<tr><td>Incident Name</td><td>Name of the overall Incident (Category or Event) for this Investigation.</td></tr>
<tr><td>Task Name</td><td>A short phrase or label that identifies the task.</td></tr>
<tr><td>Description</td><td>A longer narrative or description about the task.</td></tr>
</table>

3 **Task Response Info Section** – Complete this section according to the guidelines below.

* Required field

<table>
<tr><th colspan="2">Task Response Form</th></tr>
<tr><th colspan="2">Task Response Info Section</th></tr>
<tr><th>Data Field</th><th>Description</th></tr>
<tr><td>Response Category ✶</td><td>General category for type of response.
Use this data field’s LOV to make a selection. The current choices are:
<table>
<tr><th>Category</th><th>Explanation</th></tr>
<tr><td>Additional Information Requested</td><td>The individual working on this task portion has requested more information in order to complete this task.</td></tr>
<tr><td>Completed</td><td>This task portion has been 100% completed.</td></tr>
<tr><td>No Action Needed</td><td>This task portion does not need to be done at all.</td></tr>
<tr><td>Please Review</td><td>This task portion has a document/deliverable that needs to be formally reviewed by other members of the Incident Command.</td></tr>
<tr><td>Progress Update</td><td>Status on how much of this task portion has now been completed.</td></tr>
</table></td></tr>
</table>

4 **Assignment Info Section** (view-only) – Is partially auto-filled with data from the originating Task Tracking Form.

* Required field

Task Response Form	
Assignment Info Section	
Data Field	**Description**
Group Assigned To	Name of an Incident Command unit/team/group that is responsible for performing the task described on the originating Task Tracking Form.
Who Assigned To	Last and first name of the individual who will supervise or perform this task.
Date Assigned	Date on which the appropriate person/team was personally notified of this task assignment. OR Date on which the task was recorded on the originating Task Tracking Form as being assigned to the appropriate person/group.
Date Due	Date on which the task is required to be completed.
Date this portion completed ✶	Date on which the task response was completed. (This response may or may not indicate completion of the entire task that was assigned.) There are three ways to enter this date: • Click on the Today icon ( ) to enter the current date. • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Time Assigned	Time when the appropriate person/group was personally notified of this task assignment. OR Time when the task was recorded on the originating Task Tracking Form as being assigned to the appropriate person/team.
Time Due	Time when the task is required to be completed.
Time this portion completed	Time when the task portion documented on this Task Response form was 100% completed. Use the data field’s LOV to make a selection.

5 **Submission Info Section** (view-only) – Is partially auto-filled with data from the originating Task Tracking Form.

* Required field

Task Response Form	
Submission Info Section	
Data Field	**Description**
Submitted by	Name of the individual who submitted the originating Task Response Form.
Date Submitted	Date on which this Task Response Form was first submitted. There are two ways to enter this date: • Click on the Calendar icon ( ) to display and use a pop-up calendar. • Manually type the date using this format: MM/DD/YYYY (use slashes, not dashes, to separate).
Time Submitted	Time when this Task Response Form was submitted. Use the data field's LOV to make a selection
(Unlabelled Comment Block)	Description regarding any progress made towards completing the task portion being reported on this Task Response Form. Manually enter this information.

6 **File Attachments Section** – Use to associate other documents with the Task Response Form.
Examples of such attachments can be: digital maps showing local supplier locations, draft of a plan/SOP that was written as part of this task, a brochure/flyer announcing a meeting with the general public/animal producers, scanned requisition forms for new supplies to be ordered, etc.
Tip: To attach pictures/photographs, first embed them within a Microsoft Word or PDF document.

To attach a file, do the following:

a. Next to a blank **File Upload** data field, click on Browse... .
b. A Choose File pop-up window appears. Use it to navigate to the appropriate online directory where the file is stored.
c. When you find the file you want to attach, double-click on its name.
d. The Choose File pop-up window closes. You now see this file's full pathname in the **File Upload** data field.
   Note: Whenever you attach files, you will first need to save the form in order to open/view these attachments.

7 **Document Management Section** (view-only) – Displays information about the persons who created/edited this form.

8 After entering all of your data in this form, click on SAVE .

The form refreshes, displays the data you just entered, and adds a new **Edit History Section**.

9 **Edit History Section** (view-only) – Displays information about recent changes that have been made to this form.

Task Response Form – Next Steps

At this point, you can do any of the following tasks:

- Use any of the Grey Action Buttons:

EDIT	Click, to re-open this form in data-entry mode. After making your changes, click on SAVE.
NEW TASK RESPONSE	Click, to open a new Task Response Form. This form will be auto-filled with data from the originating Task Tracking Form.
MAIL IT	Click, to open a new memo within the Lotus Notes email application. The new memo is auto-filled with a URL for this Task Response Form and is ready for you to email to the recipients you select from your Address Book.
HELP	Click, to display a Help Document about this form. Click on ☒ to close this Help Document.
REQUEST DELETION	Click, to submit a request to delete this form and all descendent documents created from it.
DELETE DOC	Click, to permanently delete this form and all descendent documents created from it.

- Use the WelcomePage -> Task Tracking -> Task Response breadcrumb trail to navigate to a different form already opened for this case.

- Use the Task Info | Task Response | Assignment Info | Submission Info | Files And History | Doc Management | All Sections Navigation Bar to navigate within the Task Response Form.

  Click once on a specific tab to go to that section, or click once on the **All Sections** tab to display the entire form onscreen. (You may need to scroll vertically or horizontally to see some parts of the form.)

- View the data on this form in alternate report formats by using the Category/View feature (see right).

  a. In the **Category** data field, select **Tasks**.
  b. In the **View** data field, select a format for this report.
  c. Click on the symbol to generate this report.