

e-Suite Incident Finance Transition Checklist

From DNRC HOST UNIT to INCOMING IMT

Transitioning DNRC Incident from Enterprise to Site:

- Log in to the Enterprise incident as a Data Steward and add the IMT's IT Specialist as a user.
- Create the Enterprise Transition File using the Data Transfer feature.
- Save the file to a flash drive or other portable device and deliver to the IMT.
- The IMT's IT Specialist will Import the Data Transfer File to Site.
- Local DNRC Host Unit will discontinue working in the database once transferred to IMT.

For step-by-step instructions, see the *e-Suite Data Transfer User Guide* located at <https://www.wildfire.gov/page/eisuite-user-guides>

Transitioning DNRC Incident from Site to Enterprise:

- From Site, create the Transition File using the Data Transfer feature.
- Save the file to a flash drive or other portable device.
- Import the Data Transfer File to Enterprise.
- Local DNRC Host Unit will discontinue working in the database once transferred to IMT.

For step-by-step instructions, see the *e-Suite Data Transfer User Guide* located at <https://www.wildfire.gov/page/eisuite-user-guides>

DNRC Finance Package Transition

- Start hard copy incident file box and transfer all incident records to the incoming IMT so the package is kept together in its entirety until return to host unit.
 - See Tools for IMTs at <https://www.nwccg.gov/committees/incident-planning-subcommittee>. This site has file labels ready to print and explains what should be kept and how it should be organized.
 - **It is imperative that the IMT understands DNRC requires HARD COPY files, NOT electronic data, and original source documents must not be shredded!**

Transitions between IMTs

e-ISUITE TRANSITION

- Confirm the e-ISuite information has been transferred and that the incoming team has the Database name and password and the incoming ITSS has been added with a valid Data Steward role.
- Transfer all electronic files that support financial functions, logic, and/or decisions, COST logic, un-operated equipment, etc.
 - make sure your electronic files **ONLY** include the current assigned incident.

Finance Package Transition

- Keep the incident file boxes together and ongoing (even if multiple IMT transitions) until the end of the incident, when the entire package is turned back to the DNRC Host Agency.

- If payment packages have been audited and are ready to mail, make sure they get sent.
- If applicable, ensure copies of AD and National Contract resource payment transmission logs are clearly identified in the Finance box. Each batch number must be unique and well documented to maintain the integrity of tracking.
- Provide documentation and background for any outstanding issues that require follow-up.
 - Identify the physical location of all documentation regarding these issues before the outgoing team leaves.
 - Confirm documentation from the outgoing IMT is in place before they leave.
- Get contact phone numbers / email for the outgoing IMT members – especially the FSC and LSC as these will be key contacts if any questions arise after the IMT demobs.

Transition from FINAL IMT back to DNRC HOST UNIT

e-ISUITE TRANSITION

SITE TO SITE:

- The final backup Database file should be loaded onto a flash drive and given to the DNRC Incident Host Agency financial rep at closeout.
 - Include DB Name and password and the login name and password for the user assigned the Account Manager role from the host unit

SITE TO ENTERPRISE:

- On the Data Transfer page in Site, Create the Transition File and password. Give the Data Transfer Name and password to the DNRC Incident Host Agency finance rep.
- Transfer all electronic records from the outgoing IMT's server for this incident. Electronic finance files may include, but not limited to:
 - Buying Team spreadsheets
 - Back up spreadsheets used by COST for "support cost estimates"
 - Saved pdf documents of financial exports or cost share reports
 - Transition reports
 - Anything else related to finance records that may have been saved electronically

Finance Package Transition

- All finance information turned back to the DNRC Host Agency in the proper Legacy format.
- Any outstanding claims issues and where the physical records are in the package.
- Advise the Agency Administrator of any other known, unresolved, finance issues.
- Any outstanding medical issues, patient follow-up needs, and location of M-Logs in the files.
- Vendor invoices that still need to be completed, posted, and closed out. Pay particular attention to Rental Vehicles. *The IMT is responsible for closing out all un-operated equipment payments if equipment was released prior to IMT's travel home date.*
- Status of payment packages:
 - Master copy of the Payments Transmission Log
 - Are there packages that need to be audited and sent? Do copies need to be made?

e-ISUITE TRANSITION

THIS FORM MAY ALLOW ACCESS TO PII – USE IN ACCORDANCE WITH NRCG PII GUIDELINES

DATABASE INFORMATION

e-ISuite Version:	or date:
SITE DB Name:	P/W:
Transition File Name:	P/W:

Account Manager: _____

USER NAME: ad.

Enterprise or Site

P/W: _____

INCIDENT INFORMATION

Name:	Incident Number:
DNRC Host Unit:	Start date:
SABHRS Accounting Code:	USFS PCode:

TRANSFERRED FROM: _____

Name, Unit and Contact #

TRANSFERRED TO: _____

Name, Unit and Contact #

Has SITE DB been transferred to ENTERPRISE? Yes No

If no, who has physical ownership of the SITE DB backup file? _____

If yes ->

DATA STEWARD: _____

Unit: _____