

DOCUMENTATION



DALLAS CERT Advancement Module 02

- This module will cover:
 - **Minimum responsibilities** for documentation
 - **Processes** for documenting CERT activities
 - Turning over **completed documentation**

- Safety
 - Account for team members
- Organization
 - To get situation overview
 - Prevent duplication of tasks
 - Coordinate multiple teams



- Communication
 - Track victims
 - Track equipment & materials
 - Efficient transfer of command/shifts

- Review & reimbursement
 - Record of actions and issues
 - Justify expenses & reimbursement



Documenting Your Neighborhood

- We're going to talk about documenting the work that CERT members do, but one question is often asked – what about my neighborhood?
- The answer depends upon your resources and neighborhood organizations, but some thoughts:
 - Work with your neighborhood group to share phone numbers to the extent everyone feels comfortable
 - Get to know neighbors – in an emergency each person probably has skills to contribute
- Ideally, encourage others to become CERT trained

What constitutes documentation?

- Field documentation
 - Triage markings – masking tape, streamers
 - Door markings – the big X
 - Improvised forms & notepads
 - Photographs



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What constitutes documentation?

- Formal documentation
 - Incident Command System (ICS) forms
 - Dallas CERT forms
 - Forms from other organizations
 - Receipts



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Documentation Levels **In your area**

- As a loner on your street
 - Sizeup and damage assessment
 - Actions taken – Task Status & Task Assignment
 - Medical treatment record
- As a team in a neighborhood or police division
 - Team sign-in / sign-out
 - Communication log – use the “Activity Log”
 - Sizeup and damage assessment
 - Actions taken – Task Status & Task Assignment
 - Medical treatment record

***Check here for the downloadable forms:
<http://www.dallascert.com/training.asp>***

Documentation Forms

Deployment

- Team sign-in - 003
- Participation waiver
- Team leadership assignments sheet - 001
- Incident management tracking sheet - 000
- Damage assessment
- Incident briefing
- Activity log - 002
- Equipment sign in/out
- Operational task sheet
- Medical treatment record
- *ICS 309 Communications Log* (optional)

***Check here for the downloadable forms:
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- Same as CERT deployment needs
 - All the forms if this is a FORMAL alliance
 - If it is a handoff, say solo CERT member to firefighters, field documentation suffices
- May use forms provided by other agencies provided information is kept for:
 - Team sign-in / sign-out
 - Team leadership assignments sheet

Minimum responsibilities

- CERT is internally responsible for CERT members & equipment
 - Sign-in / sign-out
 - Accountability for CERT man hours expended
 - Equipment owned by Dallas CERT



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Minimum responsibilities

- CERT should always record tasks that are formally delegated to CERT
 - A **task list**, even if not detailed
 - Principal **communications** with the EOC and with other responders
 - **Photos** of any task performance to the extent it is convenient
 - **Successes and failures** to improve future performance



Minimum responsibilities

- If any victims are treated
 - CERT must maintain **records of victims and where they may be transported**
 - Notes about any third party or other responders working with victims if documentation must be shared with that third party or other responders



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Let's get practical

**Now we should look at
some practical processes**



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How to do documentation

- 1st preference is to **use ink** - ballpoint
- **Legibility** is important – print
- If a computer is used (yes, there may be a laptop handy!) - start a form or document by typing a title, then **SAVE** it before proceeding; save **OFTEN!**
- Examine your document flow – make sure field teams turn info over

Documentation Processes

- Leadership responsibilities
 - Assign a scribe
 - Remind everyone to PRINT clearly
- Scribe responsibilities
 - Assess available forms or notepaper
 - Sketch a map of the incident
 - Document tasks assigned
 - Start a log of all important communications
 - Keep a timeline



Documentation processes

- Sizeup
 - Incident area and structure
 - ❖ Level of damage
 - ❖ Access points
 - ❖ Use the A/B/C/D building notation if you know how
 - Hazards
 - Victims
 - Access routes

Documentation processes

- Search & Rescue – what to document:
 - Team status
 - Number and type of victim, location of victims, likely extraction type needed
 - Tape or triage info attached to victims
 - Interior hazards and their location

Documentation processes

- Medical treatment
 - Speed is important
 - Be flexible – use what materials you can find
 - Should include:
 - ❖ forms that stay with CERT and,
 - ❖ triage tags or other forms that go with the patient
 - May need a supplies list to hand off to leadership or logistics

Are we done?

Turnover

- If using Dallas CERT forms or ICS forms
 - All those forms – or copies / transcriptions get turned in to the Dallas Office of Emergency Management (OEM/EOC)



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- If another agency needs a copy or you are using their forms
 - you should get their unit name and location so that the OEM can fax or email a copy later **or** have them send copies to OEM
 - Keep supplemental notes covering timeline and tasks
 - CERT team sign-in/sign-out and work hour data **MUST** be kept for OEM

Are we done?

- Hold a debriefing
 - Clarify any necessary items for documentation
 - Account for equipment
 - Account for all CERT members
 - What went well and what not so well

Summary

- Minimum responsibilities for documentation
 - CERT people, equipment, tasks
 - Victims
- Processes for documenting
 - Field
 - Formal

Summary

- Turning over documentation
 - Getting a record to the OEM
 - Accounting for CERT work hours & materials
- Reasons for documenting
 - Safety
 - Organization
 - Communication
 - Review and reimbursement

INSTRUCTIONS:

Go to [Forms at Dallas OEM](#) and find and download the forms you would need to document , for an incident in your neighborhood, the scope of the incident, tasks you perform, and victims you treat, to the extent that you are able.

SITUATION OVERVIEW

It is late August and a heavy storm front came through the city the day before bringing with it a tornado that ripped a sizeable path through a large area. News reports indicate that all fire rescue resources are heavily involved in rescue and fire suppression activities. You are awakened at 0400 by a loud crash and momentary flashes of light from the street side of your home. Awakening others, you go out onto the street and find three vehicles that have apparently run into each other and a utility pole. You grab your CERT kit and go to see what can be done.



Incident data

Address: 1409 Halbeck Road, Grover, TX 75001

You and one CERT buddy that live nearby join up and go to survey the scene. On the way you call 911 and are told that it will be 15 minutes before an ambulance or EMT can reach the area. A police car will be dispatched but arrival time is unknown; the operator asks to be updated.

Sizeup data

A dark colored Suburban is the best off, with no intrusion into the passenger compartment. A silver Hyundai is severely damaged on the passenger side. A dark green Ford has no intrusion into the passenger compartment, but is leaking fuel. A power line is down near the front of the vehicles and you quickly deputize a neighbor to keep people away from it.



Victims

Charles Lawson – age 26, driver of the Suburban, is suffering an asthma attack and has no medication with him.

Marlene Winsome – age 49, driver of the Hyundai, is trapped because her car is wedged against the suburban. You ask her to try crawling out through a back door and she is able to do that. You find she has a gash on the right thigh from a windshield frame and it is slowly dripping blood, breathing fine and is relatively calm

Tony Bainbridge – age 33, driver of the Ford, is now out of the car & feeling chilly

Carl Oerly – age 63, a neighbor, tried to open the door for Marlene and has strained a wrist

Documentation

**Almost done,
Now, Please take the quiz by
clicking this link:**

[DocsQuiz](#)



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