DETAILED LESSON OUTLINE

COURSE: I-Suite

UNIT: 4.11 – ITS: Advanced topics.

SUGGESTED TIME:

TRAINING AIDS: Computer projector, screen, PowerPoint presentation, computer (one for instructor and one per trainee).

OBJECTIVES: Upon completion of this unit, the trainee will be able to:

1. Manage contractor and agreement data from IRSS input.
2. Work with the appropriate Unit of Measure (UOM) and coordinating with cost.
3. Handle complicated contracts.
4. Work with auditing functions for personnel and crew time, equipment time, and commissary time.
5. Close out payment documents.
6. Manage multiple incidents.
7. Troubleshoot the ITS application.
8. Answer outstanding questions.

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INTRODUCE THE UNIT. **PRESENT UNIT OBJECTIVES.** **EXPLAIN THAT THIS UNIT COVERS MORE DIFFICULT TOPICS.** **AT THE END OF THIS UNIT WE WILL DISCUSS TOPICS OF YOUR CHOICE.** I. INTRODUCTION: A. Manage contractor and agreement data from IRSS input. B. Work with the appropriate Unit of Measure (UOM) and coordinating with cost. C. Handle complicated contracts. D. Work with auditing functions for personnel and crew time, equipment time, and commissary time. E. Close out payment documents. F. Manage multiple incidents. G. Troubleshoot the ITS application. H. Answer outstanding questions. **INSTRUCTOR AND STUDENTS LOG ON TO ITS.** II. EXERCISES **EXPLAIN THAT COMPLEX CONTRACTS INCLUDE RESOURCES SUCH AS CONTRACT CREWS AND ENGINES, PORTABLE TOILETS, AND RESOURCES WITH MULTIPLE RATES BASED ON DURATION.** **THE NEXT SET OF EXERCISES WILL HELP YOU MANAGE CONTRACTOR AND AGREEMENT DATA, STEP BY STEP.**	

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EXPLAIN THAT YOU WILL WORK WITH CONTRACTS AND SHIFT TICKETS TO ADD CONTRACTOR DATA AND TO POST TIME TO CONTRACTED RESOURCES.	04_11-01-HO
A. To determine if the contractor already exists in the I-Suite database, perform the following.	
1. Click the **Contracts** button.	
2. On the **Contracted Resource Add/Edit** screen under **Select Type**, click to select the **Contract resource** of your choice.	
3. Click the **Contractor Name** drop-down arrow, and then click to select the **Contractor** of your choice.	
EXPLAIN THAT STUDENTS SHOULD REFER TO THE CONTRACT TO ADD CONTRACTOR DATA.	
B. To add a new contractor.	
1. Click the **Contracts** button.	
2. On the **Contracted Resource Add/Edit** screen on the **Add** tab.	
3. Complete the following information as appropriate	
a. Name.	
b. EIN/SSN.	
c. Address.	
d. City.	
e. ST.	
f. Zip.	
g. Phone.	
4. Click the **Save** button.	

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NEXT, CREATE AN AGREEMENT AND ATTACH IT TO THE CONTRACTOR. C. To create the agreement and attach it to the contractor. **MAKE SURE THE CONTRACTOR NAME IS DISPLAYING ON CONTRACTED RESOURCE ADD/EDIT SCREEN BEFORE CREATING THE AGREEMENT.** 1. On the **Contracted Resource Add/Edit** screen, click the **Contractor Name** drop-down arrow, and then click to select the **Contractor Name** of your choice. 2. Click the **Agreement** tab, and then click the **Add** tab. 3. Complete the following information. a. Agreement Number. b. Begin Date. c. Expiration Date. d. Point of Hire. e. Administrative Office for Payment. 4. To attach the agreement to the contractor, click the **Agreement Number** drop-down arrow, and then click to select the **Agreement Number** of your choice. 5. Click the **Save** button.	

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THE NEXT STEP IS TO DEFINE THE RESOURCES TO BE PROVIDED BY THE CONTRACT AND TO ENTER THEIR RATES. D. To add resources and rates and link them to the contractor and agreement. 1. On the **Contracted Resource Add/Edit** screen under **Select Resource By**, click **Name** or **Request Number**. 2. Click the **Unique Name** or **Request Number** drop-down arrow, and then click to select the **Name** or **Request Number** of your choice. 3. Complete the **Contractor Name** and **Agreement Number** boxes for the **Contractor/Agreement** of your choice. 4. On the **Resource** tab on the **Edit** tab, complete the following information. a. In the **Unique ID** box, create a unique name for the resource. b. Complete the **Make**, **Model**, and **Remarks** boxes, as appropriate. c. Click to select the **Gov't Operator** and **Gov't Supplies** check boxes, as appropriate. d. Complete the **Hired Date** and **Time** boxes and the **Released Date** and **Time** boxes, as appropriate. e. Click to select the **Withdrawn** check box, as appropriate. f. Click the **Rate Type** drop-down arrow, and then click to select the **Rate Type** of your choice.	

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g. Click the **UOM** drop-down arrow, and then click to select the **Unit of Measure** of your choice.	
WHILE THE CONTRACT RATE MAY STATE "DAILY," "WEEKLY," OR "MONTHLY" FOR RESOURCES SUCH AS "TABLES," "CHAIRS," "TOILETS," OR "HANDWASH STATIONS," THE UOM IS "EACH."	
TO CODE THIS ACCURATELY, ENTER "DAILY," "WEEKLY," OR "MONTHLY," IN THE DESCRIPTION BOX.	
BE SURE TO PRESS TAB TO ADVANCE TO THE NEXT BLANK ROW TO SAVE YOUR DATA!	
h. Click in the **Rate** box, and then type the appropriate **Rate** for that **Rate Type** and **Unit of Measure**.	
i. Press TAB twice to advance the cursor to the next **Rate Type** box.	
REMEMBER TO ADD ALL PRIMARY RATES, AND USE SPECIAL RATES FOR MILEAGE.	
5. Verify that the correct **Request Number**, **Contractor Name**, and **Agreement Number** display on the upper portion of the **Contracted Resource Add/Edit** screen.	
6. Click the **Save** button.	
7. On the **Warning – Check for Correct Agreement/Contractor** dialog box, click **Yes**.	
NOW THAT YOU DEFINED THE CONTRACTOR, AGREEMENT AND RESOURCES, YOU NEED TO POST THE TIME FOR THESE RESOURCES USING THE APPROPRIATE PRIMARY AND SECONDARY RATES.	

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E. To post time for resources. 1. Click the **Post Time** button, and then click the **Contract Equipment, Crews and Other** tab. 2. Under **Select Type**, select the equipment type of your choice. 3. Click the **Contractor Name** drop-down arrow, and then click to select the **Contractor Name** of your choice. 4. Perform one of the following a. Click the **Equipment Unique ID** drop-down arrow, and then click to select the **Equipment** of your choice. b. Click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice. 5. Click the **Account Code** drop-down arrow, and then click to select the **Account Code** of your choice. 6. Under **Post Options**, click to select the **Rate Type** of your choice. 7. If one-half rate applies, click to select the **½ Rate** check box. 8. Post the required information as appropriate for that **Rate Type** and **Unit of Measure**. 9. To commit the posting, click the **Commit Posting** button. **ONCE YOU HAVE CORRECTLY POSTED THE TIME FOR THE RESOURCES YOU CAN PRINT THE OF-286.**	

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REMEMBER THAT THE OF-286 IS THE INVOICE FOR THE CONTRACTED RESOURCES, AND LISTS THE **RATES AND DATES THE CONTRACTED RESOURCE WAS USED ON THE INCIDENT.** F. To print the OF-286. **REMEMBER, YOU CAN ALSO PRINT THE OF-286 BY CLICKING THE "PRINT OF-286" BUTTON ON THE INCIDENT POST-POSTING EQUIPMENT SCREEN.** 1. On the **Reports** menu, click **OF-286 w/ Deductions**. 2. On the **OF-286** dialog box, complete the following. a. Under **Select Type**, click to select the **equipment type** of your choice. b. Click the **Contractor** drop-down arrow, and then click to select the **Contractor Name** of your choice. c. Click the **Agreement** drop-down arrow, and then click to select the **Agreement** of your choice. d. Click the **Equipment** drop-down arrow, and then click to select the **Equipment** of your choice. 3. Under **Report Options**, click to select one of the following. a. OF-286 with Itemized Deductions. b. OF-286 Only. c. Itemized Deductions Only.	

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4. To preview and then print the report, click the **Preview/Print Report** button, and then click the **Print Report** icon.	
SOMETIMES YOU MAY FIND THAT A CONTRACTOR WAS ENTERED TWICE INTO ITS, WHICH MAY OR MAY NOT HAVE RESOURCES ATTACHED TO EACH ONE.	
ITS WILL NOT ALLOW YOU TO DELETE A CONTRACTOR WITH ATTACHED RESOURCES AND/OR AN AGREEMENT.	
THERE ARE FIVE BASIC STEPS TO DELETE A DUPLICATE CONTRACTOR:	
▪ **FIRST, RENAME BOTH DUPLICATE CONTRACTORS.**	
▪ **PERFORM AN EQUIPMENT SEARCH TO LOCATE THE CONTRACTOR WITH NO RESOURCES.**	
▪ **NEXT, DELETE THE AGREEMENT AND DUPLICATE CONTRACTOR.**	
▪ **FINALLY, REFRESH YOUR SCREEN TO REFLECT THE LATEST INFORMATION.**	
G. To delete a duplicate contractor with no attached resources.	
1. To locate the duplicate contractors, click the **Contracts** button, click the **Contractor Name** drop-down arrow, and then locate the duplicate **Contractor Names**.	
RENAME BOTH CONTRACTORS SO THAT YOU CAN DISTINGUISH BETWEEN THE TWO.	
2. To rename the duplicate contractors, perform the following.	
a. On the **Edit** tab, click the **Contractor Name** drop-down arrow, and then click to select the first duplicate **Contractor Name**.	

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b. In the **Name** box, edit the **Contractor Name** and then click the **Save** button.	
FOR EXAMPLE, INSERT THE NUMBER "1" TO THE END OF THE FIRST CONTRACTOR NAME.	
c. On the **Edit** tab, click the **Contractor Name** drop-down arrow, and then click to select the second duplicate **Contractor Name**.	
d. In the **Name** box, edit the **Contactor Name** and then click the **Save** button.	
FOR EXAMPLE, INSERT THE NUMBER "2" TO THE END OF THE CONTRACTOR NAME.	
3. To locate the contractor with no attached resources, perform the following.	
a. Click the **Equipment Search** button.	
b. To sort the data by **Contractor Name**, click the **Contractor Name** column heading.	
c. Scroll to the duplicate **Contractor Name(s)**.	
ONLY THE CONTRACTOR WITH ATTACHED RESOURCES WILL DISPLAY ON THE EQUIPMENT SEARCH SCREEN.	
THE DUPLICATE CONTRACTOR THAT DOES NOT DISPLAY ON THE SCREEN IS THE ONE YOU WANT TO DELETE.	
4. To delete the agreement number attached to the duplicate contractor, click the **Contracts** button, click the **Agreement Number** drop-down arrow, click to select the appropriate **Agreement Number**, and then click the **Delete** button.	

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5. To delete the duplicate contractor, click the **Contractor Name** drop-down arrow, click to select the **Contractor Name** you want to delete, and then click the **Delete** button.	
REMEMBER, ITS WILL NOT ALLOW YOU TO DELETE A CONTRACTOR THAT HAS ATTACHED RESOURCES OR AN ATTACHED AGREEMENT.	
6. To verify that the deletion of the duplicate contractor, click the **Refresh** button.	
FOR THIS NEXT EXERCISE, YOU WILL FIRST MOVE RESOURCES FROM THE DUPLICATE CONTRACTOR TO THE CONTRACTOR YOU WANT TO KEEP.	
H. To delete a duplicate contractor with attached resources.	
1. To locate the duplicate contractors, click the **Contracts** button, click the **Contractor Name** drop-down arrow, and then locate the duplicate **Contractor Names**.	
2. Edit/rename the duplicate contractors.	
3. On the **Contracted Resource Add/Edit** screen under **Select Resource By**, click **Name** or **Request Number**, and then click to select the **Name** or **Request Number** of the resource to be moved.	
4. Click to select the **target Contractor Name** and **Agreement Number** for the resource to be moved, and then click the **Save** button.	
5. Move all **resources** to the **target Contractor Name/Agreement Number**.	
6. To delete the agreement number attached to the duplicate contractor, click the **Contracts** button, click the **Agreement Number** drop-down arrow, click to select the appropriate **Agreement Number**, and then click the **Delete** button.	

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7. To delete the duplicate contractor, click the **Contractor Name** drop-down arrow, click to select the **Contractor Name** you want to delete, and then click the **Delete** button.	
8. To verify that the deletion of the duplicate contractor, click the **Refresh** button.	
THIS NEXT EXERCISE EXPLAINS HOW TO POST A PARTIAL PAYMENT FOR A FIREFIGHTER.	
THE KEY POINT TO POSTING A PARTIAL PAYMENT IS INFORMING OTHERS!	
▪ **ADD REMARKS TO THE PERSONNEL ADD/EDIT SCREEN ABOUT THE PARTIAL PAYMENT.**	
▪ **COMMUNICATE WITH THE COST PEOPLE THAT YOU DID A PARTIAL PAYMENT.**	
I. To post a partial payment for a firefighter.	
1. To print the **OF-288**, perform the following:	
a. On the **Reports** menu, click **OF-288**.	
b. On the **OF-288** dialog box, click the **Person** drop-down arrow, and then click to select the **Person** of your choice.	
c. Click to select the **Final** check box, and then click the **Preview Report** button	
d. To print the **OF-288**, click the **Print Report** button.	
2. Click the **Personnel** button, and then click the **Edit/Lookup** tab.	
3. Click the **Select Personnel** drop-down arrow, and then click to select the **Person** who is receiving the partial payment.	

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4. In the **Remarks** box, type the following information. a. PP b. date of partial payment. c. Your initials. **BE SURE TO NOTIFY COST PERSONNEL ABOUT THE PARTIAL PAYMENT.** J. To post a partial payment to a contractor 1. On the **Reports** menu, click **OF-286**. 2. On the **OF-286** dialog box, complete the **Contractor**, **Agreement**, and **Equipment** boxes. 3. Click the **Last Date Included on Invoice** drop-down arrow, and then click to select the **Last Date** for the partial payment. 4. Under **Print Options**, click to select **Preview/Print ORIGINAL Invoice**, and then click the **Preview/Print Invoice** button. **ONCE YOU CREATE THE ORIGINAL INVOICE, YOU CANNOT EDIT IT.** 5. Click the **Print Report** icon, and then click the **OK** and **Yes** buttons on the **IReports** dialog boxes. **YOU CAN NOW SEND THIS INVOICE TO THE PAYMENT CENTER FOR PAYMENT.** K. To delete a previous invoice for payment to a contractor. **DO NOT RECREATE AN INVOICE IF ONE HAS ALREADY BEEN SENT TO THE PAYMENT CENTER.**	

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USE THIS OPTION ONLY IF THE PREVIOUS INVOICE HAS NOT BEEN SENT TO THE PAYMENT CENTER. **IF CREATING THE FINAL INVOICE, SET THE RELEASE DATE AND TIME, SO THAT THE INFORMATION WILL BE CARRIED OVER TO THE RESOURCE EDIT SCREEN FOR EQUIPMENT.** 1. On the **Reports** menu, click **OF-286**. 2. On the **OF-286** dialog box, complete the **Contractor**, **Agreement**, and **Equipment** boxes. 3. On the **Warning** dialog box, click **Yes**. 4. On the **Final Warning** dialog box, click **Yes**. 5. On the **Reason** dialog box, type a brief **Reason** for deleting the invoice, and then click **OK**.	