



Basic Unit 8 – Release and Reassign

**ROSS Dispatch Training Instructor Guide
Release 2.16.12**

For ROSS Steady State
Operations & Maintenance

12.0



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Basic Unit 8 – Release and Reassign

OBJECTIVES

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

1. Release a resource from an incident.
2. Edit a resource's release.
3. Reassign a resource to another incident request.
4. Quick Fill reassign a resource to another incident.
5. Release a resource from a non-local incident.
6. Manage release authorization.

REVISION LOG

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12.0	10/08/2018	2.16.12: No updates.	M. Apicella
11.0	01/22/2018	2.16.11: No updates.	M. Apicella
10.0	10/06/2017	2.16.10: No updates.	M. Apicella
9.0	03/29/2017	2.16.9: No updates.	M. Apicella
8.0	01/23/2017	2.16.8: No updates.	M. Apicella
7.0	01/17/2017	2.16.7: No updates.	M. Apicella
6.0	05/11/2016	2.16.6: No updates.	J. Olson
5.0	02/16/2016	2.16.5: No updates.	C. Dingman
4.0	07/14/2015	2.16.4: No updates.	C. Dingman
3.0	04/23/2015	2.16.3: No updates.	C. Dingman
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1.0	02/28/2014	Re-formatted for consistency with NAP Instructor Guides, and updated for ROSS version 2.16.1.	J. Vahl

BASIC UNIT 8: RELEASE AND REASSIGN

8.1 Objectives

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.1 Objectives	<p>Display Slide ROSSD-SL-BASIC-08-01 (Release & Reassign).</p> <p>Display Slide ROSSD-SL-BASIC-08-02 (Objectives).</p> <p>Display Slide ROSSD-SL-BASIC-08-03 (ROSS Dispatch Process).</p> <p>Point out which portions of the ROSS Dispatch Process are discussed in this unit.</p>

8.2 Overview

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.2 Overview	<p>Log into Pagosa Springs Dispatch.</p> <p>Perform a quick, uninterrupted walk-through of the screens and major functions to be covered in this unit.</p> <p>Use the ‘extra’ resources in the training database as appropriate to demonstrate major actions.</p>

☑	Topic	Instructor Actions
☐	8.2 Overview (continued)	Do not field student questions during the walk-through; have students save their questions for the lecture.

8.3 Incident Resources Screen > Filter Criteria Panels

☑	Topic	Instructor Actions
☐	8.3 Incident Resources Screen > Filter Criteria Panels	<p>Open the Incident Resources screen for the Deer Valley incident.</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Accessed by Incident menu or IR toolbar button. • Used to release and reassign resources. • Most Recent Incidents toolbar drop-down list applies (but not to Non-Local Support Requests radio button). • Set Incident Filter panel. <ul style="list-style-type: none"> – Local radio button.

☑	Topic	Instructor Actions
☐	8.3 Incident Resources Screen > Filter Criteria Panels (continued)	<ul style="list-style-type: none"> – Non-Local Support Requests radio button and drop-down list – Provides access to non-local support requests your dispatch created and retained control of. • Set Incident Filter panel. <ul style="list-style-type: none"> – Set Catalog Filter section. – Set Resource Filter section. <ul style="list-style-type: none"> ▪ Set Filter Criteria for Incident Resources. <ul style="list-style-type: none"> ▫ Days or Less At Incident – Covers At Incident through Demob En Route. ▫ Travel Mode check box and radio buttons – Limits search results to resources that used selected mode of travel at least once during trip to incident.

☑	Topic	Instructor Actions
☐	8.3 Incident Resources Screen > Filter Criteria Panels (continued)	<ul style="list-style-type: none"> ▪ Set Filter Criteria for Individual Resources. <p>Select Deer Valley incident Overhead request filled by Lori Peterson (At Incident).</p>

8.4 Incident Resources Screen > Incident Resources Grid

☑	Topic	Instructor Actions
☐	8.4 Incident Resources Screen > Incident Resources Grid	<p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Only resources whose mobilization ETD has passed but demobilization ETA has not passed display. • Resources used to fill untracked requests do not display. • Grid columns. <ul style="list-style-type: none"> – Column of note: Release Authorization. <p>Note: Point out that release authorization is discussed later in this unit.</p>

☑	Topic	Instructor Actions
☐	8.4 Incident Resources Screen > Incident Resources Grid (continued)	<ul style="list-style-type: none"> • Go To button • View button. • Print button. • Show Subordinates check box.

8.5 Release Resource Dialog Box

☑	Topic	Instructor Actions
☐	8.5 Release Resource Dialog Box	<p>Note: Point out that this unit discusses releasing single resources from local and non-local incidents. Releasing prepositioned, parent, and subordinate resources is discussed in the Intermediate Course.</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Release only enabled for Mob En Route and At Incident resources.

☑	Topic	Instructor Actions
☐	8.5 Release Resource Dialog Box (continued)	<ul style="list-style-type: none"> • Can release: <ul style="list-style-type: none"> – Resources on requests for which release authorization is not required. – Resources on requests for which release authorization is required and: <ul style="list-style-type: none"> ▪ Resource is Tentative Released, and ▪ Release authorization received. • Release Status panel. <ul style="list-style-type: none"> – Release radio button. <ul style="list-style-type: none"> ▪ Enabled if authorization is not required, or if required and has been obtained. ▪ Disabled if authorization is required but not yet obtained. – Tentative Release radio button. <ul style="list-style-type: none"> ▪ Travel options are not applicable for tentative release.

☑	Topic	Instructor Actions
☐	8.5 Release Resource Dialog Box (continued)	<ul style="list-style-type: none"> ▪ Cannot tentatively release a Mob En Route resource for which release authorization is not required. • Release Date/Time. Set Release Date/Time for 2 days from now. • Travel panel. Set travel TBA. • Release Options panel – Applies to prepositioned resources. • Release To Location. <ul style="list-style-type: none"> – If you multi-select resources to be released, cannot set a Release To location. – Pick Release Location dialog box tabs: Organizations, Airports, and Locations.

☑	Topic	Instructor Actions
☐	8.5 Release Resource Dialog Box (continued)	<ul style="list-style-type: none"> • Available for Reassignment – Only applicable to tentative Release. <ul style="list-style-type: none"> – Tentative Released (A). – Tentative Released (U). • Enter Documentation. <p>Release Lori Peterson from Deer Valley incident.</p> <p>Select Airtanker T1 request filled with Airtanker 500. Open Release Resource dialog box.</p> <ul style="list-style-type: none"> • Release To Base. <ul style="list-style-type: none"> – Applicable when releasing a Record Manager Only tactical aircraft resource. – Pick Release To Base dialog box. <p>Click Cancel; do not release the resource.</p>

8.6 Edit Release

☑	Topic	Instructor Actions
☐	8.6 Edit Release	<p>Select Overhead request filled by Lori Peterson (Released At Incident).</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • To edit a resource’s release your dispatch must be one of the following: <ul style="list-style-type: none"> – Incident Dispatch. – Home Dispatch. – Dispatch that dispatches for resource's Current Operating Base. – Requesting Dispatch (if non-local support request with control retained). • Edit Release dialog box. <ul style="list-style-type: none"> – Tentative Release radio button – Only the Incident Dispatch can tentatively release a resource. – Cancel Release radio button.

☑	Topic	Instructor Actions
☐	8.6 Edit Release (continued)	<ul style="list-style-type: none"> ▪ If Tentative Released or Released (At Incident), only Current Dispatch can cancel (this is also true for non-local support requests regardless of control). ▪ If Demob En Route, only Incident Dispatch can cancel (unless non-local support request, where only controlling dispatch can cancel). ▪ After a resource’s release is cancelled, its status is set to At Incident (or Available on preposition if applicable). ▪ Can also cancel a resource’s release via the ‘Cancel Release’ Action button option on Request Status screen. – Release Date/Time – Disabled if Tentative Release radio button selected and resource is Mob En Route.

8.7 Practice Session

☑	Topic	Instructor Actions
☐	8.7 Practice Session	Stop the lecture here and have students practice using the part of the unit scenario dealing with releasing resources. Do <u>not</u> move into the part of the unit scenario dealing with reassigning resources yet.

8.8 Reassign Resource Dialog Box > Pending Requests Tab

☑	Topic	Instructor Actions
☐	8.8 Reassign Resource Dialog Box > Pending Requests Tab	<p>Select Deer Valley incident Overhead request filled with Bradley LaFrentz.</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Used to reassign resource to another incident request. • Search for requests pending with your dispatch that resource could fill. • Local Incidents and Non-local Incidents radio buttons.

☑	Topic	Instructor Actions
☐	8.8 Reassign Resource Dialog Box > Pending Requests Tab (continued)	<ul style="list-style-type: none"> • External Incident Requests check box. • Set Search Criteria for Requests panel. <ul style="list-style-type: none"> – Search by Qualification radio button – Displays resource's current qualifications. <ul style="list-style-type: none"> ▪ For Overhead: <ul style="list-style-type: none"> ▫ Also displays status of each qualification: Qualified (Q) or Trainee (T). ▫ Qualifications that are Unknown (U), Blocked (B), or Unqualified (N) do not display. – Search by Catalog Item radio button. <ul style="list-style-type: none"> ▪ Applicable to Overhead only. ▪ Search for a role the resource can perform but is not qualified for.

☑	Topic	Instructor Actions
☐	8.8 Reassign Resource Dialog Box > Pending Requests Tab (continued)	<ul style="list-style-type: none"> ▪ Choose Catalog Item for Reassignment dialog box. • Select Request for Reassignment grid. <ul style="list-style-type: none"> – Grid columns. – View button. In Select Request for Reassignment grid, select Excess Timber incident request for Logistics Chief T1. Click OK. • Reassign Request dialog box – Identical to Reassign Resource dialog box that displays when reassigning from Pending Request screen. Set At Incident and complete the reassignment.

☑	Topic	Instructor Actions
☐	8.8 Reassign Resource Dialog Box > Pending Requests Tab (continued)	<ul style="list-style-type: none"> • When reassigning a resource whose original assignment was filled by an external supply cache, ROSS: <ul style="list-style-type: none"> – Prevents reassignment if reassign-to request or reassign-to incident does not have a financial code. – If a prepositioned NFES resource, sets Release Option to Release to Home.

8.9 Reassign Resource Dialog Box > Quick Fill Reassignment Tab

☑	Topic	Instructor Actions
☐	8.9 Reassign Resource Dialog Box > Quick Fill Reassignment Tab	<p>Select Deer Valley incident Equipment request for Strike Team Dozer T1 filled with The Dennis Dozer.</p> <p>In Reassign Resource dialog box, select Quick Fill Reassignment tab.</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Can reassign one or more resources.

☑	Topic	Instructor Actions
☐	8.9 Reassign Resource Dialog Box > Quick Fill Reassignment Tab (continued)	<p>Note: Point out that multi-reassignment is discussed in the Intermediate course.</p> <ul style="list-style-type: none"> • Does not display if selected resource is from Supply catalog. • Set Resource Criteria for Reassignment panel. • Select Incident for Reassignment panel. <p>In Select Incident for Reassignment grid, select Excess Timber incident. Click OK.</p> <ul style="list-style-type: none"> • Request is created on selected incident, using system default block, and filled with resource being reassigned.

8.10 Practice Session

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.10 Practice Session	Stop the lecture here and have students practice using the part of the unit scenario dealing with reassigning Aircraft, Crews, Equipment, and Overhead resources.

8.11 Resources (Nonlocal Incident) Screen > Filter Criteria Panel

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.11 Resources (Nonlocal Incident) Screen > Filter Criteria Panel	<p>Open the Resources (Nonlocal Incident) screen.</p> <p>Note: Point out that the Non-Local Support Requests radio button on the Incident Resources screen is discussed in the Intermediate course. In this unit we will discuss releasing resources from non-local incidents using the Resources (Nonlocal Incident) screen.</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Accessible from Resource menu. • Must have Dispatch Manager role to access.

☑	Topic	Instructor Actions
☐	8.11 Resources (Nonlocal Incident) Screen > Filter Criteria for Filled Requests Panel (continued)	<ul style="list-style-type: none"> • Allows either Home Dispatch or Preposition Dispatch to release, or edit release of, their resources from a non-local incident. • Also used: <ul style="list-style-type: none"> – To add a subordinate request to a non-local parent request. – By a Home Dispatch to add documentation to a request for which they are not in the Ordering Chain. • Filter criteria fields. <p>Filter for 'CO-SJF' Provider and 'Bear Lake' Incident Name.</p>

8.12 Resources (Nonlocal Incident) Screen > Filled Requests Grid

☑	Topic	Instructor Actions
☐	8.12 Resources (Nonlocal Incident) Screen > Filled Requests Grid	Select Overhead request filled with Saul Peterson.

☑	Topic	Instructor Actions
☐	8.12 Resources (Nonlocal Incident) Screen > Filled Requests Grid (continued)	<p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Does <u>not</u> display Reassigned (At Incident) and Demob En Route resources. • Only displays tracked requests. • Grid columns. • View button.

8.13 Resources (Nonlocal Incident) Screen > Action Button

☑	Topic	Instructor Actions
☐	8.13 Resources (Nonlocal Incident) Screen > Action Button	<p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Release. <ul style="list-style-type: none"> – Can release resource from a non-local support request whether or not your dispatch retained control.

☑	Topic	Instructor Actions
☐	8.13 Resources (Nonlocal Incident) Screen > Action Button (continued)	<ul style="list-style-type: none"> – Can release resource from a non-local preposition incident even if resource has been assigned to a non-preposition. – Release Resource dialog box. Set ETD and ETA in the future and complete the release. • Edit Release. • Add Subordinate Request – Applicable only to filled configuration requests. • Add Documentation – Necessary when a resource is reassigned from one non-local incident to another non-local incident, in order for Home Dispatch to provide reassign-to Incident Dispatch information about resource.

8.14 Release Authorization Screen > Set Filter Criteria for Incidents Panel

☑	Topic	Instructor Actions
☐	8.14 Release Authorization Screen > Set Filter Criteria for Incidents Panel	<p>Log into the GACC that is the parent of the Pagosa Springs dispatch.</p> <p>Open the Release Authorization screen.</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Accessible from Resource menu. • Must have Dispatch Manager role, with ‘Release Authorization Management’ function assigned. • Used to control release of resources assigned to incidents managed by your subordinate dispatches. • Can be designated at catalog, category, or catalog item level for each individual incident. • Cannot be set for catalog item that is: <ul style="list-style-type: none"> – An alias (i.e., not unique).

☑	Topic	Instructor Actions
☐	8.14 Release Authorization Screen > Set Filter Criteria for Incidents Panel (continued)	<ul style="list-style-type: none"> – A service. – Untracked. <ul style="list-style-type: none"> • If release authorization required, must be obtained from Incident Dispatch’s parent dispatch. • Incident Dispatch tentatively releases the resource; parent dispatch then either authorizes the release or leaves the release ‘on hold’. • Release authorization not required for resource assigned to non-local support request for which control was maintained by requesting dispatch. • If release authorization is required for parent resource, it is required for subordinates, whether or not catalog, category, or catalog item of subordinate request is designated as requiring release authorization. • Filter criteria fields. <p>Filter for dispatch CO-PSD.</p>

8.15 Release Authorization Screen > Select Incident Grid

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.15 Release Authorization Screen > Select Incident Grid	<p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Grid columns. • View button. <p>Select Teller Peak incident.</p>

8.16 Release Authorization Screen > Manage Release Authorization for Incident > Release Restrictions Tab

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.16 Release Authorization Screen > Manage Release Authorization for Incident > Release Restrictions Tab	<p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Used to create or delete release restrictions. • Set Filter Criteria for Release Restrictions panel.

☑	Topic	Instructor Actions
☐	8.16 Release Authorization Screen > Manage Release Authorization for Incident > Release Restrictions Tab (continued)	<ul style="list-style-type: none"> • Release Restrictions grid – Displays release restrictions in place for selected incident. • New button and Add Release Restriction dialog box. • Cannot edit an existing restriction; it must be deleted and then created again.

8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab

☑	Topic	Instructor Actions
☐	8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab	<p>Switch to the Incident Resources tab.</p> <p><u>Discuss the following:</u></p> <ul style="list-style-type: none"> • Used to take action on tentatively released resources assigned to selected incident.

☑	Topic	Instructor Actions
☐	<p>8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab (continued)</p>	<ul style="list-style-type: none"> • Set Filter Criteria for Incident Resources panel. • Incident Resources grid. <ul style="list-style-type: none"> – Columns of note: <ul style="list-style-type: none"> ▪ Release Authorization – Displays ‘Hold’, ‘Authorized’, or ‘N/A’ as appropriate. ▪ Resource Status – Status is followed in parenthesis by either ‘A’ or ‘U’ indicating resource’s availability for reassignment. – Displays resources: <ul style="list-style-type: none"> ▪ Assigned to a request requiring release authorization. ▪ With status of Mob En Route or Tentative Released. ▪ On request with status of Tentative Released.

☑	Topic	Instructor Actions
☐	8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab (continued)	<p>Select Equipment resource 'Tractor-Plow #25'.</p> <ul style="list-style-type: none"> • Action button. <ul style="list-style-type: none"> – Hold Release. <ul style="list-style-type: none"> ▪ Switches status from 'Authorized' to 'Hold'. – Authorize Release. <ul style="list-style-type: none"> ▪ Switches status from 'Hold' to 'Authorized'. Select Authorize Release. – View/Add Documentation. • View button. <p>Note: If time permits, demonstrate that the resource can now be released from the incident.</p>

8.18 Practice Session

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.18 Practice Session	Have students complete the remainder of the unit scenario.

8.19 Objectives Review

<input checked="" type="checkbox"/>	Topic	Instructor Actions
<input type="checkbox"/>	8.19 Objectives Review	<p>Display Slide ROSSD-SL-BASIC-08-04 (Objectives Review).</p> <p>Ensure each objective has been met.</p> <p>Elicit and answer remaining student questions.</p> <p>Request students fill out the unit evaluation.</p>