



STATE EMERGENCY RESPONSE TEAM

**SEOC PLANNING SECTION
Documentation Unit SOG
Revised June, 2017**

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I. Unit Responsibilities

The following list highlights the main functions of the unit.

- Maintain situational awareness
- Develop and disseminate situation reports
- Develop and disseminate other reports as required
- Establish and maintain an event chronology
- Maintain event files
- Maintain the Command and General Staff situational awareness folders
- Maintain battle rhythm on the 5th screen, white board and within EMC
- Schedule and maintain conference room needs for the SERT
- Maintain email distribution lists for the Planning Section
- Assist with documenting After Action reporting

II. Unit Leader Responsibilities

The Documentation Unit Leader may perform all of the unit responsibilities in a small event. During a larger event, however, there are multiple personnel to assist with specific functions. The Documentation Unit Leader is assigned by the Planning Section Chief (PSC) and helps develop Documentation Unit staff scheduling.

A. At the Start of an Event

The PSC will notify the Documentation Unit Leader when an event is imminent or has occurred. The PSC will also communicate what is needed as far as reports, staffing and timelines for these needs. The Documentation Unit Leader will typically be responsible for the following “start-up” tasks:

- Create/distribute an initial Flash Report for the event (or prepare one in advance for events with notice)
- Create new folders on the Shared Drive for the event files
- Create new templates for Situation Reports, conference room schedules, etc. (begin populating these as available)
- Obtain the availability of all Documentation Unit staff
- Create a draft roster to present to the PSC
- Ensure the Documentation Unit room is set up
- Create initial battle rhythm display
- Monitor information coming into EOC-Plans email and EMC

B. Throughout an Event

The primary purpose of the Documentation Unit is to ensure that timely and accurate information is distributed to the SERT.

Throughout the duration of an event, the Unit Leader will:

- Assess and reassess the processes used by the unit
- Talk regularly with the PSC about the performance, issues and needs of the unit
- Support and develop innovative ideas
- Consider the needs and ideas of the unit staff

III. Communication & Login Information

Below are the current email and EM Constellation logins that are used by the Documentation Unit staff. All usernames can be found in the matrix below. All passwords can be obtained from the Documentation Unit Leader or Planning Section Chief.

Usernames & Passwords		
Logging in to:	User Name	Password
<i>Webmail</i>	EOC-Plans	Obtain from Unit Leader or Planning Section Chief
<i>EM Constellation</i>	documentation	Obtain from Unit Leader or Planning Section Chief

A. EOC-Plans Email

It is important for at least one staff member of the Documentation Unit to have the EOC Plans email open at all times during a disaster.

Important information is emailed to the Planning Section by various ESFs, Operations, Regional Coordinators and counties. Additionally, SERT members may use this email address to ask questions or to request conference room reservations, webinars, etc. There are two ways to access the EOC-Plans email login, either directly through the website or by navigating from the SERT home page.

- Direct access: <https://webmail.em.myflorida.com>
- Through the SERT website:
<https://portal.floridadisaster.org/SitePages/Home.aspx>
 - Click the Resources Tab located in the top right hand corner of the page.
 - Then click the link called "Outlook Web Access."

B. EM Constellation

EM Constellation (EMC) is used by the SERT and counties during disasters and events to share information and to request and track missions. The Documentation Unit uses EMC to gather information (e.g., county situation reports) and to upload our products for others to read as well. EMC is accessed through the SERT home page.

- Through the SERT website:
<https://portal.floridadisaster.org/SitePages/Home.aspx>
 - Click the Resources Tab located in the top right hand corner of the page.
 - Then click the link called “EM Constellation.”
 - “EMCx” is used for exercises and training purposes, login info is the same.

IV. The Shared Drive

All documents produced by the Documentation Unit should be stored in the proper folders on the Shared Drive. All EOC computers and laptops on the DEM network (or connected to the VPN) can access these folders.

- If there is trouble accessing or storing documents on the Shared Drive, contact IT for assistance.
- All Documentation Unit files can be found in the following locations:
 - N:\ESF5_Plans\Documentation
 - N:\ESF5_Plans\FifthScreen
 - *Note: The drive letter may change over the years*

V. Situation Reports

The SERT Situation Report seeks to provide high level situational awareness of events and actions across the affected area. It—at a minimum—includes the following sections: Current Situation, Weather, County Actions and State Actions. The PSC will assign a time that it is due. Allow enough time to print, edit and reprint the report before this deadline. The following sections serve as a guide for creating and distributing a Situation Report.

A. Where to Find Them and How to Save Them

- Past Situation Reports are located here:
 - N:\ESF5_Plans\Documentation\SitReps
- When the Situation Report is ready to be saved, “Save As” a new document on the Shared Drive.
- Use the following naming convention:

- SERT Situation Report #XX_Incident Name_MM-DD-YY_XXXXhrs
- Example: SERT Situation Report #2_Haiti Earthquake_1-29-10_1300hrs

B. Building a Situation Report

- Open the “ROLLING” Situation Report from the folder of the appropriate event
 - If starting a Situation Report for a new event, use an old report from an event that was similar in the past (all saved in this folder on the Shared Drive).
 - Make the new items to the current reporting period RED and change the past items to black.
 - ***IMPORTANT: If you are creating Situation Report for an exercise/drill, make sure that “***THIS IS A DRILL***” or “***THIS IS AN EXERCISE***” is placed in the header as well as the footer of the document in bold RED font.***
- Update the **Situation Report Header**
 - Make sure the Situation Report number, date and time of publishing is correct.
 - Activation status (3, 2, or 1).
 - Update the line that says “Information is current as of XXXXhrs EDT (or EST).”
- Update the **Current Situation Report** if needed
 - This is the “what”, “who”, “when”, “where”, and “why” of the Flash Report. It describes what is going on in the State that warranted this report.
- Update the **Weather Summary** and **Consequences**
 - Weather Summaries may be provided by the SERT meteorologists or by finding the most current National Weather Service information.
 - Consequences typically are—but not always—weather related and may include: Hurricane watches/warnings, Flood watches/warnings, tornado watches/warnings, etc.
- Update the **Graphic** that depicts the current situation
 - Maps may be provided by the SERT meteorologists or GATOR. Maps can also be obtained from the National Weather Service’s website or open source media if the situation warrants.
- Update the **County Actions** table
 - Use the “Blank County Action Table (forSitRep)” for this task

- The file is located here:
N:\ESF5_Plans\Documentation\SitReps
 - Only list counties that have an EOC activation level that is Level 2 or Level 1
 - Note if each activated county has:
 - **Local State of Emergency** (Yes/No)
find date LSE declared and keep a running list of when they expire
 - **Evacuation orders** (Yes/No/Yes-low lying areas/Yes-mobile homes/etc.)
 - **Open Shelters** (Yes/No)
 - **Government Closures** (Yes/No/Critical Offices Open Only/etc.)
 - **School Closures** (Yes/No/Yes-private schools/etc.)
 - When completely finished and ready to put this table in the Word document
 - Highlight all the cells in the table and select Copy; then go to the “ROLLING” Word document and select “Paste Special” to paste the table into the Word document either using the “Microsoft Office Excel Worksheet Object” or “Picture (Enhanced Metafile)” options.
 - Using one of these options will allow the table to fit onto the page easily.
- Update the **Executive Order/Declaration** table
 - Note each Executive Order/Declaration name, date signed and the purpose
- Update the **SERT Personnel Deployment** table (if applicable, this isn't always included)
 - Note each type of team or personnel and their home Agency
 - Note how many of each are deployed and their deployment location
- Update the **State Actions** table
 - This information can be found using the morning briefing slides. If no information is found, have someone from the Documentation or the Situation Unit verify with the Branches.
 - Each Branch (Emergency Services, Infrastructure, Human Services) should have a section; relevant information for each ESF should go under its respective branch.
 - Public Information, Recovery, Logistics, Finance & Administration, ESF 13, ESF 18, and Information & Planning should all have a section with information as needed also.

C. Approval of Situation Reports

- Cross-check information with the Situation Unit.
- Check for spelling and grammatical errors.
- Print out and give to the PSC (or deputy) for review and approval.
 - Edit and make all changes requested by the PSC.
- The PSC will take the Situation Report to the SERT Chief for approval.
 - Do not publish the Situation Report before both approvals!
- Upon both PSC and SERT Chief approval, convert the file to an Adobe PDF and save it on the Shared Drive using the same naming convention as described in Section VI.A.

D. Publishing Situation Reports

All reports (Situation, Flash, etc.) should be published using these steps. If there is uncertainty as to whether or not a report needs to be distributed to this entire group, ask the PSC. Reports are first posted into EMC, and then emailed to a distribution list in the EOC-Plans email account. Follow these steps to do both:

- **First, publish in EMC,**
 - Check that you are in the correct Incident and in the Info Tab click *New Info Message* and fill out all of the blank boxes
 - Type of Message: Situation Report
 - Category: State
 - Organization: SERT
 - Subject: Same naming convention as the file for the subject line
 - Message: "Please see attached"
 - Name: Planning Section/Documentation
 - Phone Number: 850-xxx-xxxx or 850-xxx-xxxx (Obtain from Unit Leader)
 - Attachment: Attach the PDF version of the report
- **Next, publish in EOC-Plans email** via distribution list
 - Log into EOC-Plans email account and start a new email:
 - Subject: Same naming convention as the file for the subject line
 - To: Click the *To* button and *Find names in: Contacts*

- Type “FL” in the Display Name line and click *Find*
- Select “FLASH REPORTS and SITREPS” and then click *Add Recipient* to BCC, then close that window, in the “TO” line enter the EOC-Plans email address.
- In the body of the email, type “Also posted in EM Constellation Info Message #XX.”
- Below that, copy and paste the Word document version of the Situation Report into the body of the email (this is for Blackberry/smartphone users).
- Attach the PDF version to the email.
- *Send* the email.

VI. Flash Reports

Flash Reports are short, single-page reports used to detail a specific event that deserves notification during an event. Examples of Flash Report topics include: the SEOC activating for an event, a hurricane making landfall, a mass casualty incident, etc. These reports contain the Current Situation, Weather Summary (if applicable), a graphic and State Actions. Flash Reports are produced as directed by the PSC. **Once a Flash Report has been directed to be produced, it should be produced, approved and distributed within 15 minutes.**

A. Where to Find Them and How to Save Them

- Past Flash Reports are located here:
 - N:\ESF5_Plans\Documentation\Flash Reports
- When a Flash Report is ready to be saved, “Save As” a new document on the Shared Drive.
- Use the following naming convention:
SERT Flash Report #XX_Incident Name_MM-DD-YY
 - Example: SERT Flash Report #02_Tropical Storm Isaac_8-25-12

B. Building a Flash Report

- Open a Flash Report template (or an older Flash Report) that is similar the current situation to use as a base for your new report. ***IMPORTANT: If you are creating a Flash Report for an exercise/drill make sure that “***THIS IS A DRILL***” or “***THIS IS AN EXERCISE***” is placed in the header as well as the footer of the document in bold RED font.***

- Update the **Flash Report Header**
 - Make sure the Flash Report number, date and time of publishing is correct.
 - Activation status (3, 2, or 1)
- Update the **Current Situation** if needed
 - This is the “what”, “who”, “when”, “where”, and “why” of the Flash Report. It describes what is going on in the State that warranted this report.
- Update the **Weather Summary** (only included if PSC requests)
 - Weather Summaries may be provided by the SERT meteorologists or by finding the most current National Weather Service information.
- Update the **Graphic** that depicts the current situation (if applicable)
 - Maps may be provided by the SERT meteorologists or GATOR. Maps can also be obtained from the National Weather Service’s website or open source media if the situation warrants.

C. Approval & Publishing Flash Reports

- Use the same steps outlined in Situation Report Section VI.C. for obtaining PSC and SERT Chief approval.
- Use the same steps outlined in Situation Report Section VI.D. for publishing the Situation Summary Reports in EMC and through the EOC-Plans email.

VII. Conference Room Reservation

During SEOC activations, the Documentation Unit is responsible for the organization and managing of all conference room reservations in the SEOC and co-manages the use of rooms in the Sadowski building. The Division’s Administrative Assistant is the other co-manager of the Sadowski rooms and should be consulted before assigning a room to a group.

A. Where to Find the Schedule and How to Save It

- Conference room scheduling sheets are saved here:
 - N:\ESF5_Plans\Documentation\Conference Room Schedules
- Open the “Conference Room Schedule Template” and “Save As” a new document on the Shared Drive that references the event.
 - Example: “Conference Room Schedule_TS Isaac”

- The existing conference room Excel file should have multiple worksheets (tabs across the bottom).
 - There should be one worksheet for each specific room (i.e., 130D, 120C, etc.).
 - There should be a worksheet with the date which displays all the conference room schedules for that day.
 - Make sure to update the Event Name and Date on the header of each worksheet tab.

B. Managing Room Scheduling

- Each conference room should have a printed schedule for the week placed on the door of the room.
 - Comes from the Excel Conference Room Schedule file
 - When schedules are updated, you must print a new version and place it on the conference room door.
- There should be a daily master list of all conference rooms and scheduled events.
 - Comes from the Excel Conference Room Schedule file
 - This should be printed and placed on the whiteboard inside the Documentation Unit room.
 - When schedules are updated, you should print a new version and place it on the whiteboard.
 - It can be helpful to print these a few days in advance for people scheduling rooms in the future.
- An individual (ESF, agency, etc.) may request a room via email to EOC-Plans or in person.
 - They must provide the time, date, purpose of meeting, length of the meeting and number of people attending.
 - It is helpful to know if they need items such as projector, conference call line, webinar, etc.
- Check the printed master spreadsheet to see if the requested room is available on that date/time, then schedule as available.
- Always email the individual back with confirmation of the reservation.
- Rooms available for reservations include, but not limited to:

Building	Room Number	Other Info
Rudd	120C	Has projector and conference call capabilities
Rudd	130D	Has projector and conference call capabilities
Sadowski	Director's Conference Room	1 st Floor, Has conference call capabilities
Sadowski	320Q	3 rd Floor, Has conference call capabilities

VIII. Battle Rhythm & Fifth Screen

The battle rhythm is the schedule that sets the operational tempo. It is usually driven by a series of meetings that all operations, plans and other meetings are arranged around. The "Fifth Screen" refers to the fifth (far right) projector screen wall of the SEOC which contains the Battle Rhythm and daily Operational Objectives.

A. Where to Find It and How to Save It

- Past Battle Rhythm PowerPoint slides are located here, in the relevant event folder:
 - N:\ESF5_Plans\FifthScreen
- When the Fifth Screen slides are updated, they should reflect the date.
 - Example: TS Debby_5th Screen_7-6-12

B. Maintaining the Fifth Screen

- Open the Fifth Screen template located here:
N:\ESF5_Plans\FifthScreen
- Update the **Fifth Screen Header**
 - Make sure the Activation Level is correct.
 - Check that Operational Hours are correct and note the EMC database name that is in use for the event.
- Update the **Operating Objectives**
 - These are updated daily and provided by the PSC; the PSC gets them from the SERT Chief.
- Update the **Daily Meetings**
 - Update with the accurate date, time and location.
 - List all meetings, unless otherwise told by the PSC.
 - Include the meeting title, time and location of each.
- Update **other relevant information**
 - List the location in EMC of the latest Situation Report and EOC Action Plan.

- List the deadline and location in EMC for all briefing slides to be submitted.
- List any Executive Orders and Presidential Declarations.
- List the EOC-Plans email address for meeting related items.

C. Displaying the Fifth Screen

- The fifth screen should be updated as frequently as necessary, including but not limited to these occasions:
 - When new meetings are added to the agenda
 - When new Situation Reports and EOC Action Plans are added to EMC
 - When new briefing slide information deadline info is needed
 - When Executive Orders are issued
 - When the activation level or operational hours change
- The podium in the SEOC is used as the computer that displays the fifth screen during operating hours.
 - To update the slide, open the file from the Shared Drive on the podium computer and set the file to slideshow mode.

D. Maintaining the Hallway Whiteboard

The whiteboard in the SEOC hallway next to the Command Room is also used to display the battle rhythm, or daily meeting schedule. This should be updated as frequently as needed with the addition/cancellation of meetings. It is easy for people to walk by and read and also provides an existing battle rhythm display should there be a disruption with the electronic display mechanisms.

E. Maintaining Battle Rhythm in EM Constellation

EM Constellation is the SERT's mission and information tracking tool.

- Login to EM Constellation under the Documentation username (password provided by Unit Leader).
- Select Event.
- Click the "Dash" tab to access the Dashboard.
- Under Catalog Zone click on Battle Rhythm and Change the "add to" option to "Top Middle" and click ADD.
- Click on "settings" to add a meeting:
 - Chose the Date of the meeting and time

- Give the meeting a title, Example: County Conference Call
- Type, is this meeting for the entire SERT or just for the Planning Section
 - You have the option to show meeting for the entire SERT to see or just the people that login under the Documentation login (desk)
- Who is the owner of this meeting, Example: SERT Chief, PSC, ESF 6
- Location, what meeting room is it located, does the meeting reoccur daily; if so check that box
- Under information, add any additional information that may be important.
- Click Save

IX. Situational Awareness Folders

These situational awareness folders should be updated at least twice per shift or as new documents are produced that should be included.

- The Logistics, Operations, Command Room, SERT Chief and PSC all get their own “folder” (a two-hole classification folder).
- Each folder should have the name of the event, SERT logo and their title on the front.
- Documents to be added to the folders every day include:
 - Flash Reports
 - Situation Reports
 - EOC Action Plans
 - SERT Press Releases
 - Executive and Supplemental Orders, Presidential Declarations
 - Cost Estimates
 - Other information as required

X. Information Source Checklist

This list is intended to provide information sources that can be used to populate the Situation Report and/or Flash Report. It is not exhaustive; there may be other sources beyond these for any event. Always check with the Situation Unit to ensure accuracy of information.

- **Branch/ESF Actions:** found on morning and evening briefing slides, verify any inconsistent data with each ESF as necessary

- **Burn Bans:** Information can be found at:
<http://www.freshfromflorida.com/DivisionsOffices/Florida-Forest-Service/Wildfire/Current-Fire-Conditions>
- **County Situation Reports:** Found in EMC and sometimes EOC-Plans email inbox
- **Damage Assessments (PA/IA):** See Recovery staff for these stats
- **Damages/Impacted Areas:** Can come from County Situation Reports, Flash Reports, SERT liaisons in the field
- **Deployed Resources:** Check Missions tab in EMC; branch/ESF briefing slides
- **EI Tool:** Feature in EMC, filled out by counties, ESFs, etc.
- **Electricity Outages:** Can be obtained from the pocket on the door of the ESF 12 room
- **EMAC Resources:** Check with Mutual Aid Branch and Missions tab in EM Constellation
- **Evacuations:** Check with Evacuation Planner, Situation Unit, County Situation Reports and EMC
- **Executive Orders/Declarations:** Check EMC
- **Fatalities and Injuries:** Must be verified through ESF 16
- **Federal Actions:** See federal/FEMA liaisons and EMC
- **Fire Management Assistance Program Declarations:** See Recovery staff, or
- **GATOR** (Geospatial Assessment Tool for Operations and Response): <http://map.floridadisaster.org/gator/>
- **Road Closures:** Only report state roads, interstates and highways. ESF16 can provide this information, but also can be found at: <http://www.fl511.com>
- **School Closings:** Can be found in County Situation Reports, Human Services Branch and EMC
- **Shelters:** Real-time shelter status:
<http://floridadisaster.org/shelters/summary.htm>
- **Transportation Closures:** Including airport, bridge, ports and rail, this info comes from ESF1/3 and on their briefing slides/in EMC
- **Weather/Forecast:** Emails from State Meteorologists, or info from the National Weather Service

XI. Job Aids

- A. Sample “Fifth Screen
- B. Daily Shift Tasks

Sample “Fifth Screen” Job Aid

State Emergency Operation Center is at a Level 1 Activation.

Operational hours are 24-hr operations.

EM Constellation Database “Hurricane Matthew” is being used to track missions and information.

Daily SERT Meetings: 10-04-16	ESF/Branch Specific: 10-04-16
0830hrs - SERT Branch Briefing – Main Floor 1100hrs - Deadline for SitRep Inputs 1115hrs - State/County Conference Call -130D 1200hrs - State Situation Report Published 1500hrs - Deadline for IAP Inputs 1600hrs - IAP Planning Meeting – 130D 1715hrs - State/County Conference Call - 130D 1800hrs - SERT ESF Briefing - Main Floor	0930hrs – ES Branch – 130D 1000hrs – ESF 6 Conference Call – 120C 1000hrs – Hurricane Matthew TF – 130D 1030hrs – HS Tactics Meeting – 120C 1145hrs – GIS Coordination Call – 120C 1330hrs – Evacuation Planning Meeting – 120C 1400hrs – Log. Planning Meeting – 120C Latest Sit Rep – Info Message #40 Latest IAP – Info Message #55 Latest ESF Briefing Slides – Mission #56 Latest Branch Briefing Slides – Mission #9

Please put Briefing Slides for Branch Briefing in Mission #75 by 0800 hrs. Thank you!

Daily Shift Tasks Job Aid

Note: This is written for day shift, but some of the procedures would apply to any shift.

1. First thing to do when you begin the morning is login to both the email and EMC:
 - EMC:
 - Username and password obtain from Unit Leader or PSC
 - Email:
 - Username and password obtain from Unit Leader or PSC
2. Check for any room requests; if there are any, update the conference room schedule and print it out. Replace the schedule on the conference room door with the updated one. This is something that needs to be done throughout the day as the room requests come through
 - Tracking: N:\ESF5_Plans\Documentation\Conference Room Schedules
3. Check the county SITREPS, EEI, and the Plans email and update the “county actions table”.
 - Tracking:
N:\ESF5_Plans\Documentation\SitReps*EventName*\County
Actions Table
4. Attend the **0830** briefing and take note of items that may not be covered on slides but that the Branch/ESF director says
5. After the briefing, get the briefing slides off of the Shared drive (choose the PowerPoint ones)
 - N:\ESF5_Plans\Tech Services\Events\2016*Event Name*\Briefing Slides
6. Open up the previous day’s SITREP and do a “save as” updating the file name to reflect the updated SITREP number and date and change all the red text to black
7. Update the info for each branch and ESF based on the info in the slides. If there is new information, make sure to put it in red. If it is repeated information, keep the information in black. If there is information that has been updated such as a number or percentage, change the number only to red text and keep the rest of the information in black.
 - **Weather, Infrastructure, ESF 18, 14, and Recovery will usually send information for the SITREP by **1100**. If you have not received it by 1030, walk out to their desk and remind them to get that information to the Planning Section.*
8. At **1100**, print out the county actions table that you have been *updating* throughout the morning. Take the printout with you to the **1115** call and, as the counties brief out, make changes to the chart as needed.
9. Replace the county actions table in the SITREP and complete any last minute changes and print out draft.
10. Take to PSC for edits and approval. If revisions are needed, complete the revisions and return the draft to the PSC. If approved, take to the SERT Chief.
11. Once the SERT Chief approves and signs the SITREP, publish the document. The step-by-step instructions on how to publish and distribute the SITREP are in the ESF 5 SOG, Section VI.C.

12. After the SITREP has been published to EMC and emailed to the distribution list, print out five copies and insert into the five situational awareness folders:

- Planning Chief
- Operations Chief
- SERT Chief
- Command Room
- Logistics Chief
 - *Make sure to two-hole punch and insert on top of the latest SITREP (or Flash Report) in the folders. These folders are red and sit behind the command staff desk. The command room folder is inside the command room. If the door is locked, knock and they will let you in.