

JOB ACTION SHEET PHONE BANK UNIT LEADER

Position title: Phone Bank Unit Leader

Job classification code required: 2588, 2589, 2591, 2822

Required Job Skills: Basic knowledge of information and communication methods including phone systems, email, and the internet; basic computer skills including knowledge of MS (office, explorer), Lotus Notes, and the internet; ability to use standard office equipment (e.g., phones, photocopier, fax machine); knowledge of ICS, supervisory experience, health education experience, excellent communication skills

Module: Communicable Disease Information Branch

You report to: Telephone Dissemination Team Leader

You supervise (if activated): Phone Bank Members

Mission

The Phone Bank Unit Leader will manage staff and coordinate all phone bank activities. This will include establishing and maintaining a secure phone bank site, ensuring equipment, protocols, playbooks, and informational documents and other resources are available and support Phone Bank member activities, ensuring Phone Bank members provide only approved information, and ensuring unanswered questions are collected once per operational period and provided to the Telephone Dissemination Leader who will forward to the CD Info Triage Unit. The Phone Bank Unit Leader will assign Unit responsibilities, will orient Phone Bank Unit members and will serve as a resource for all staff within the Phone Bank Unit.

Initial Actions

- Sign-in to Staff Roster.
- Report to and receive assignment from your supervisor.
- Put on picture ID badge and vest (if provided).
- Read entire Job Action Sheet.
- Introduce self to all staff assigned to team.
- Alert supervisor if you are unable to perform any of the duties in the Job Action Sheet. Clarify any questions or concerns with assigned supervisor prior to starting work.
- Familiarize self with the work station and resources including:
 - Physical layout of the work space (e.g. emergency exits, bathrooms).
 - If assigned, check workstation phone and computer.
 - Obtain needed office supplies (paper, pens, etc.).
 - If assigned DPH 800 MHz radio, turn on radio to assigned channel.
 - If assigned, check pager and cell phone.
- Review message form instructions, if provided.

Specific Job Actions

- Review IDER Incident Action Plan, CD Info Branch Incident Action Plan, the operational period organization chart and roster of staff assigned to the Phone Bank Unit; briefly assess staff skills;

- Be familiar with roles and responsibilities, unit functions, Job Action Sheets, and report schedules of units and staff assigned to the Phone Bank Unit;
- Be familiar with the technology, equipment and resources needed for managing a phone bank (phone bank telephone system; computer programs (MS office and explorer); Lotus Notes, the internet and SFDPH websites; phone bank protocols and playbooks
- Be familiar with the approved CD Informational documents;
- Be familiar with information resources (e.g., SFDPH/CDCP websites and recorded information lines;
- Establish command for the Phone Bank response;
- Brief staff assigned to the Phone Bank Unit on:
 - Staff name and roles
 - Mission and goals of the Phone Bank Unit
 - Assignment of workspace
 - Important phone numbers
 - Equipment needed (phone, pen, paperwork, computers, programs (email, internet), bulletin board, fax, photocopy machine, 800 MHz radio)
- Distribute and/or review
 - Job Action Sheets
 - Information packets and guidance documents
- Assign responsibilities according to unit objectives and plans;
- Delegate staff to perform any necessary tasks not specifically assigned on the job action sheets of other ICS team members;
- Activate Phone Bank sites and workstations;
- Ensure Phone Bank members have access to approved CD informational documents;
- Ensure all Phone Bank Unit members work together;
- Provide oversight and guidance to Phone Bank Unit members (e.g., answer questions, address problems, make decisions per the Unit operational objectives, and determine which problems, requests or questions need to be forwarded up the chain of command);
- Ensure callers receive appropriate information;
- Ensure Phone Bank members provide only approved information to the public;
- Ensure as-yet-unanswered questions are forwarded to the CD Info Triage Unit every operational period;
- Ensure a log of calls is maintained;
- Request personnel, equipment and IT/IS support as needed to meet incident response needs;
- Attend Telephone Dissemination Unit meetings (by telephone if needed).
- Determine times for, convene and run Phone Bank Unit meetings:
 - Share information from Incident Commander, Operations Section Chief, CD Info Branch Director and/or CD Info Dissemination Group Supervisor;
 - Obtain information for Phone Bank Unit Situation Status Update;
 - Review and/or refine Phone Bank Unit Objectives and strategies (for next operational period);
- Prepare (or delegate preparation of) the Phone Bank Unit Situation Status Update, Telephone Dissemination Unit Objectives form and Telephone Dissemination Unit Log;

- Approve Phone Bank Unit Situation Status Update and ensure it is sent to Plans Situation Status Unit;
- Approve Phone Bank Unit Objectives and ensure it is sent to Plans Situation Status Unit for incorporation into the next Operational Period's Incident Action Plan;
- Approve Phone Bank Unit Log and ensure it is sent to Plans Situation Status Unit.

Conclusion of Work Shift Actions

- Complete all required forms, reports, and other documentation and give to supervisor.
- Sign out and log the hours worked during the response
- Clean up your work area before you leave
- Leave a phone number where you can be reached.
- Brief on-coming staff at shift change on specific job position duties. Ensure that ongoing activities are identified and that follow-up requirements are known before you leave your workstation.

D R A F T

JOB ACTION SHEET PHONE BANK UNIT MEMBER

Position title: Phone Bank Unit Member

Job classification code required: 1426, 9924, 2822, 2587, 2588, 2822

Required Job Skills: Basic knowledge of communicable diseases, ICS, and role of SFDPH in an infectious disease emergency; basic computer skills including knowledge of MS (office, explorer), Lotus Notes and the internet; health education experience, excellent communication skills

Module: Communicable Disease Information Phone Bank Unit

You report to: Phone Bank Unit Leader

You supervise (if activated):

Mission

The Phone Bank Unit Member will stay up to date on approved informational documents and will provide approved information to callers.

Initial Actions

- Sign-in to Staff Roster.
- Report to and receive assignment from your supervisor.
- Put on picture ID badge and vest (if provided).
- Read entire Job Action Sheet.
- Introduce self to all staff assigned to team.
- Alert supervisor if you are unable to perform any of the duties in the Job Action Sheet. Clarify any questions or concerns with assigned supervisor prior to starting work.
- Familiarize self with the work station and resources including:
 - Physical layout of the work space (e.g. emergency exits, bathrooms).
 - If assigned, check workstation phone and computer.
 - Obtain needed office supplies (paper, pens, etc.).
 - If assigned DPH 800 MHz radio, turn on radio to assigned channel.
 - If assigned, check pager and cell phone.
- Review message form instructions, if provided.

Specific Job Actions

- Review IDER Incident Action Plan, CD Info Branch Incident Action Plan and the operational period organization chart;
- Be familiar with the Phone Bank protocols, playbooks and instructional documents;
- Be familiar with the basic technology, equipment and resources needed to access informational documents and provide information to callers (phones, computers, computer programs [MS (office, explorer); Lotus Notes, the internet] and SFDPH websites);
- Assist with activation of Phone Bank site and workstations;
- Be familiar with approved CD informational documents;
- Be familiar with CD information resources accessible by the public (e.g., SFDPH/CDCP websites and recorded information lines);
- Provide approved communicable disease and incident specific information to callers;

- Maintain a log of calls;
- Maintain a list of unanswered questions and provide to your supervisor;
- Attend Unit meetings.

Conclusion of Work Shift Actions

- Complete all required forms, reports, and other documentation and give to supervisor.
- Sign out and log the hours worked during the response
- Clean up your work area before you leave
- Leave a phone number where you can be reached.
- Brief on-coming staff at shift change on specific job position duties. Ensure that ongoing activities are identified and that follow-up requirements are known before you leave your workstation.