

EM Process Summary – AARs and Action Item Trackers

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## After Action Report (AAR) Drafting and Publication

1. **Draft AAR within 1 week of incident/event and share link with EM team for review**
  - a. Make a copy of AAR Template\_CHLA.docx in EP Compliance channel (Activations and AARs >> After Action Reports folder)
2. **Discuss drafted AAR action items at EM staff meeting OR separately scheduled AAR review meeting (for larger events)**
  - a. Validate any action items assigned to non-EM stakeholders (via email, phone call, or meeting) – consider using template below

From: Your Name  
 To: Assigned Stakeholders  
 CC: Emergency Management inbox  
 Subject: Feedback Required – AAR Action Items from **INCIDENT NAME**

Dear Leaders,

Emergency Management has drafted its after-action report from the recent **training event** or **Code Triage** or **Code Triage Standby** related to the **INCIDENT NAME** on **DATE**.

As the individuals named as responsible for some action items, I would like your input on the items listed below.

- *NOTE: EM utilizes two different types of action items (short term to be completed within 120 days **and** longer-term projects).*

Please review and validate that both the action item and proposed completion date are appropriate (or provide feedback) **no later than EOD DATE**. We hope to publish this AAR and email it to all incident participants no later than **DATE**.

SHORT TERM: Action Items (within 120 days)	Lead Responsible Section / Unit	Person Assigned	Supporting Unit(s) / Section(s)	Anticipated Completion Date
INSERT	INSERT	INSERT	INSERT	INSERT

LONG TERM - Projects	Lead Responsible Section / Unit	Supporting Unit(s) / Section(s)	Committee Assigned	Anticipated Completion Date
INSERT	INSERT	INSERT	INSERT	INSERT

Thank you,  
**INSERT SIGNATURE**

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**3. Finalize AAR within 3 weeks of incident/event**

- a. Update the publication date in AAR
- b. Export a PDF version of final AAR to Shared Drive (Emergency Management >> 1. Activations and AARs >> AARs >> CY specific folder)
- c. Move Word document draft to Final Drafts folder (EP Compliance >> Activations and AARs >> After Action Reports) and into the CY-specific sub-folder.

**4. Publish to all relevant stakeholders using the following template:**

From: Your Name  
 To: All leaders who participated in activation and/or debrief  
 CC: Rest of EM team & Emergency Management inbox  
 Subject: After Action Report - **INCIDENT NAME (MM/DD/YYYY)**

Dear Leaders,

Thank you all for your participation in our recent **training event or Code Triage/Standby activation** related to the **INCIDENT NAME** on **MONTH DATE, YEAR**.

Please review the attached after-action report (AAR) for a full incident overview including strengths, opportunities, and action items.

- A total of **# corrections** and **# corrective actions/projects** were identified in this incident – below is a table of the items specifically assigned to other departments (outside of the EM team). Please note that a full list of action items is on pages **## - ##** of the attached PDF.
- **ACTIONS NEEDED:** when your assigned item is completed, please email [EmergencyManagement@chla.usc.edu](mailto:EmergencyManagement@chla.usc.edu) to provide a report of the outcome. Outcomes will then be documented on our action item tracker and shared quarterly with the Emergency Preparedness Committee (EPC).
  - *NOTE: you will also receive a separate automated email notifying you that this action item has been added to our EPC tracker.*

SHORT TERM: Action Items (within 120 days)	Lead Responsible Section / Unit	Person Assigned	Supporting Unit(s) / Section(s)	Anticipated Completion Date
INSERT	INSERT	Tag person using the @feature	INSERT	INSERT

LONG TERM - Projects	Lead Responsible Section / Unit	Committee Assigned	Supporting Unit(s) / Section(s)	Anticipated Completion Date

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INSERT	Tag person using the @feature	INSERT	Tag person using the @feature	INSERT
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If you have any questions, please let us know directly by emailing [EmergencyManagement@chla.usc.edu](mailto:EmergencyManagement@chla.usc.edu).

Thank you,  
INSERT YOUR SIGNATURE

5. Add action items to “EPC action item” trackers (MS Lists).

NOTE: please avoid adding these items to the trackers on a Friday because the automated emails for the initial task assignment will trigger the following day (Saturday). Also, if the action item’s due date falls on a weekend, please reschedule it for the Friday before (example: action item is due on June 30 and that is a Sunday, change the due date to June 28 instead).

- a. Corrections
- b. Corrective Actions

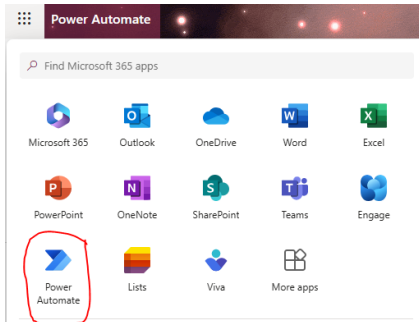
6. Once action items have been added to the trackers, assigned individuals will receive an automated email from [EmergencyManagement@chla.usc.edu](mailto:EmergencyManagement@chla.usc.edu) (via a Power Automate flow that runs at 5:30 a.m. each day).

- a. When the new task has been assigned
  - i. NOTE: based on the scheduled flow settings, this email will happen the next day.
- b. At set intervals before it is due (reminder emails)
  - i. For corrections (tasks), 1 week and 3 days before due date
  - ii. For corrective actions (projects), 6 weeks and 1 week before due date
- c. On the due date
- d. Each week that it is overdue

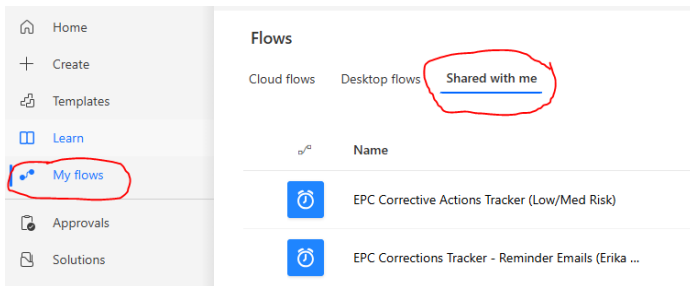
Commented [EC1]: FYI @Olson, Vicky - added this second disclaimer to avoid reminder emails triggered on a weekend.

## Transferring Power Automate Flow to New Owner

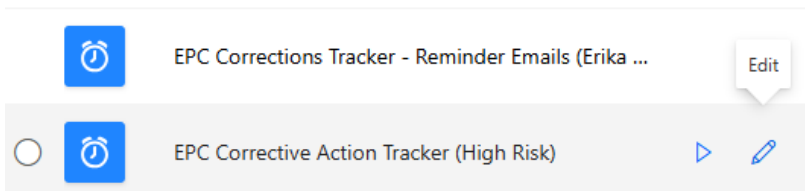
### 1. Go to Power Automate from your Microsoft 365 Apps



### 2. Click on “My Flows” and “Shared with Me”

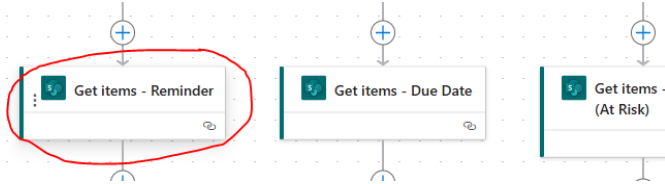


### 3. Hover over the pencil to open the flow in Edit mode



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4. Scroll down to the “Get Items” section and click on the first box.



5. Click on “Change Connection”

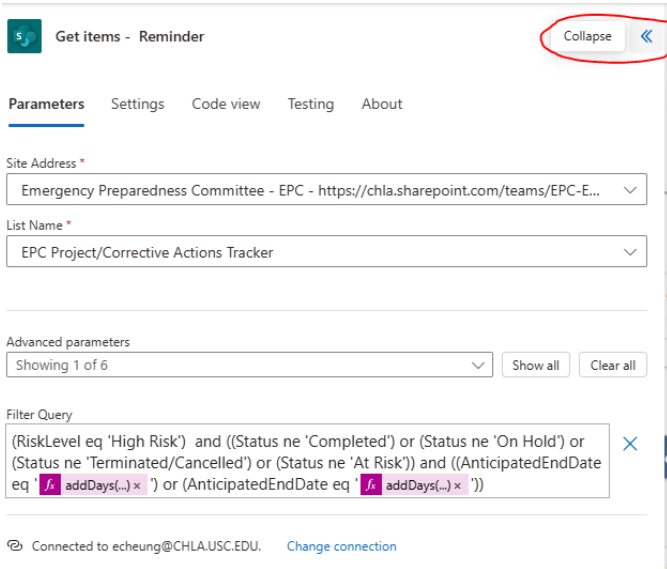
A screenshot of the 'Get items - Reminder' connector configuration page. The page shows the 'Parameters' tab with fields for 'Site Address' (https://chla.sharepoint.com/teams/EPC-EmergencyPreparednessCommittee) and 'List Name' (EPC Project/Corrective Actions Tracker). Below these are 'Advanced parameters' and a 'Filter Query' field containing a complex query. At the bottom, there is a 'Change connection' link circled in red.

6. Click on “Add New” if it is the first time. After the connection is established, you can simply click on the existing connection that is listed with your name.

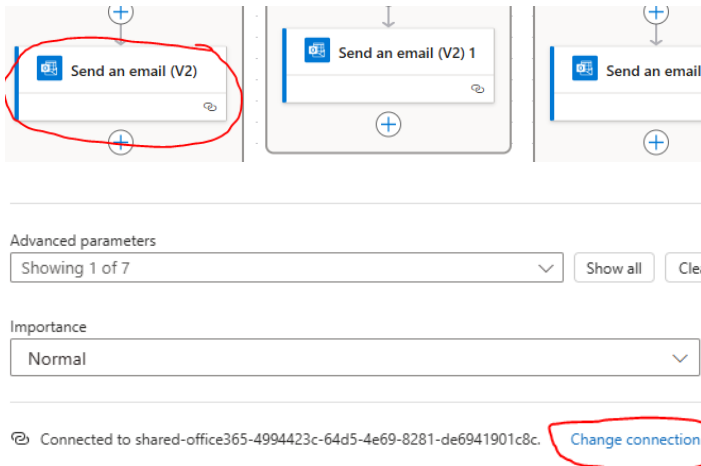
A screenshot of the 'Change connection' dialog box. It shows a list of existing connections with columns for 'Status' and 'Display name'. The first connection, 'ashuynh@chla.usc.edu', is selected. Below the list are 'Add new' and 'Cancel' buttons, with 'Add new' circled in red.

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- 7. Collapse that box and repeat this process to change connection for all of the boxes in that row that are titled “Get Items”



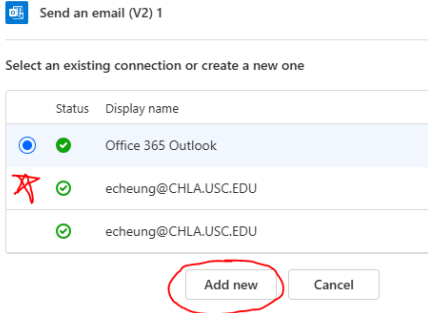
- 8. Scroll down to the “Send an email” section and click on those boxes to change connections.
  - a. NOTE: these boxes are larger so you will need to scroll down within the box to the bottom (where you can click “change connection”)



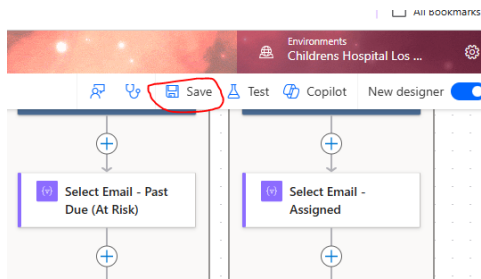
EM Process Summary – AARs and Action Item Trackers

- 9. Same as previous process – click “Add New” the first time. For all other changes, click on the existing connection (your name).

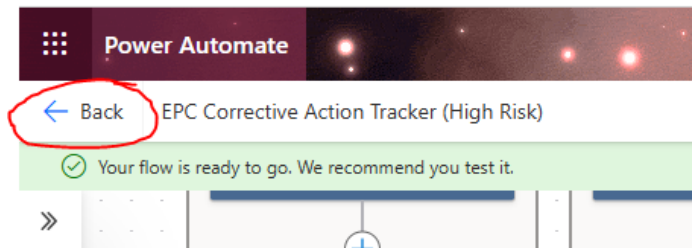
Change connection



- 10. Click “Save” in the upper right corner.



- 11. Once saved successfully, click Back



## EM Process Summary – AARs and Action Item Trackers

### 12. Click “Edit” to remove extra connections.

Flows > EPC Corrective Action Tracker (High Risk)

**Details** Edit

Flow: EPC Corrective Action Tracker (High Risk)  
Status: On  
Primary owner: Huynh, Ashley  
Created: Sep 12, 01:46 PM  
Modified: Nov 22, 01:23 PM  
Type: Scheduled  
Plan: This flow runs on owner's plan

**Connections** Edit

Office 365 Outlook	Office 365 Outlook	✓
ashuynh@chla.usc.edu	ashuynh@chla.usc.edu	✓
SharePoint	echeung@CHLA.USC.EDU	✓

Permissions: Multiple permissions

Co-owners: [Set primary owner](#) [Share](#)

### 13. Scroll down and remove “Other Connections”

**Embedded connections**  
Everyone listed as an owner will have access to all these connections and will only be able to use them in this flow. [Learn more](#)

**Connections in use**  
Connections listed are actively being used in this flow. [Manage connections](#)

echeung@CHLA.USC.EDU	SharePoint	×
echeung@CHLA.USC.EDU	Office 365 Outlook	×

**Other connections**  
Connections listed are not being used by this flow. Co-owners are able to use these connections for new or existing operations in this flow.

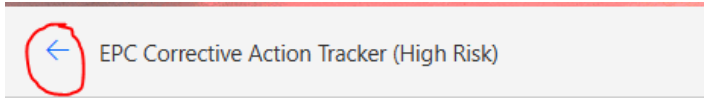
ashuynh@chla.usc.edu	Office 365 Outlook	×
ashuynh@chla.usc.edu	SharePoint	×

Are you sure you want to remove Office 365 Outlook?

This connection may be required for your flows or Power Apps. This action cannot be undone. Do you want to continue?

[Remove](#) [Cancel](#)

14. Click on the arrow to return to the previous page



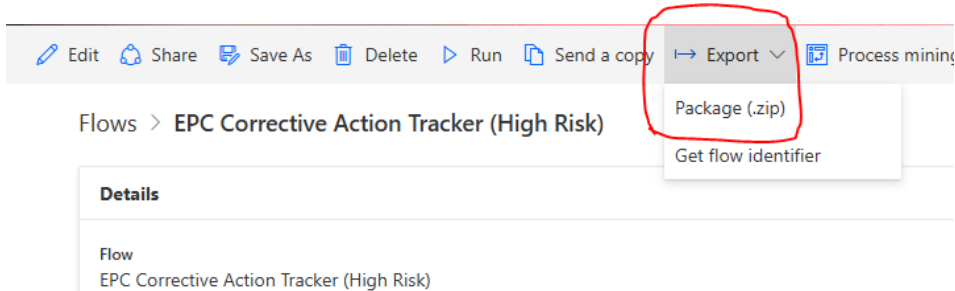
Co-owners

Adding an owner gives them full control of this flow, so make sure you only share with people you trust. They'll be able to add or remove other users as owners, access the run history,

Users and Roles

Add a user

15. Export the "Package (.zip)"



16. Enter name for new flow

- a. Recommended Name – same as existing name and only change the (Person Owned)

Export package

Package details

Created by N/A on 11/22/2024

Name \*

Environment

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### 17. Click on “Update” and select “Create as new.” Then click “Save” and “Export”

The screenshot shows the 'Export package' interface. On the left, the 'Package details' section includes fields for Name, Environment, and Description. The Name field contains 'EPC Corrective Actions Tracker - High Risk (Erika Owned)'. Below this is the 'Review Package Content' section with a table:

NAME	RESOURCE TYPE	IMPORT SETUP
EPC Corrective Action Tracker (High Risk)	Flow	Update

Below the table is the 'Related resources' section with another table:

NAME	RESOURCE TYPE	IMPORT SETUP
echeung@CHLAUSC.EDU	SharePoint Connection	Select during import
echeung@CHLAUSC.EDU	Office 365 Outlook Connection	Select during import

On the right, the 'Import setup' dialog is open, showing options for 'Create as new' (selected) and 'Update (default)'. The 'Create as new' option is circled in red. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

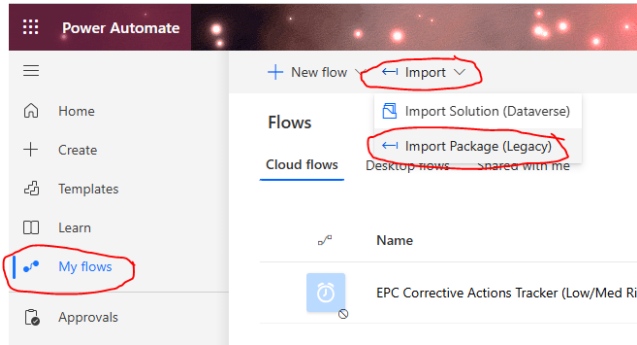
This screenshot shows the 'Review Package Content' interface. It features a table with columns for NAME, RESOURCE TYPE, IMPORT SETUP, and ACTION. The 'EPC Corrective Action Tracker (High Risk)' row has 'Flow' as the resource type and 'Create as new' as the import setup. The 'ACTION' column contains edit and delete icons. Below this is the 'Related resources' section with a similar table. At the bottom right, there is an 'Export' button circled in red and a 'Cancel' button.

### 18. File should automatically download.

The screenshot shows a browser window with a file download notification. The notification bar at the top says 'Manage your flows | Power Aut: x +'. Below it, a download icon is visible. The notification itself shows a file named 'EPCCorrectiveActionsTracker HighRisk(ErikaOwned)\_20241122213557.zip' with a size of 5.6 KB and a status of 'Done'.

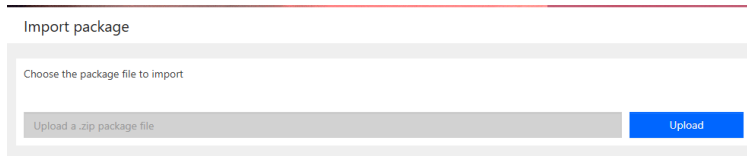
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19. Click on “My flows” and then “Import” to the Cloud Flows section.

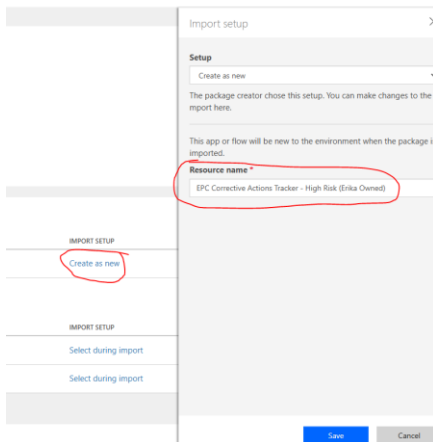


20. Click “Upload” and select newly downloaded zip folder (click on file and then Open).

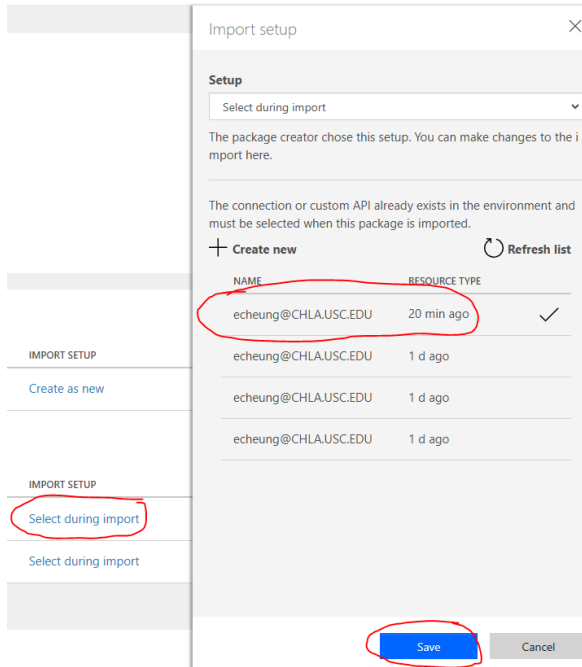
a. NOTE: file name will match the name you entered in Step 16



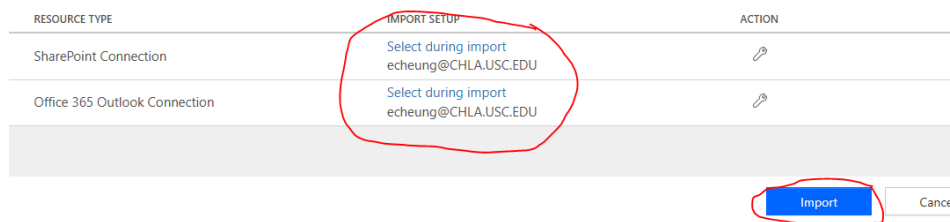
21. Do not navigate away while package is uploading. Once complete, you will need re-type the new file name. Click on “Create as new” and update the “Resource Name” (as that will default back to the original file name).



22. You will also need to select the connections by clicking “Select during Import” and then on the existing connection and then “Save”



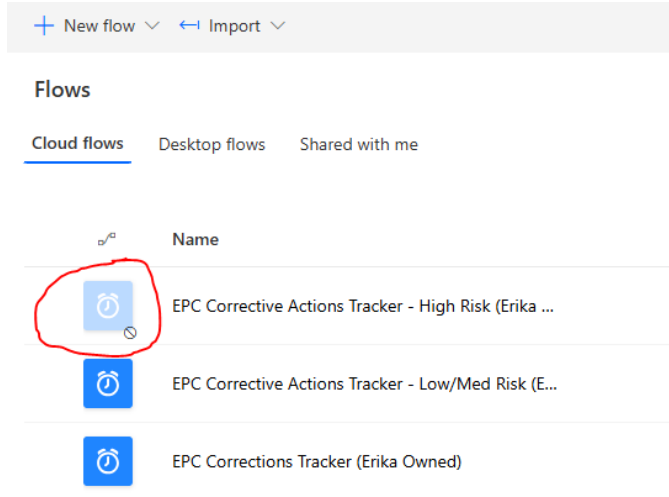
23. Repeat for second “Select during Import” so both fields are populated with your email address and then click “Import”



24. Once complete, the flow will show up under “My flows” in the “Cloud flows” tab.

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


25. If a flow appears like this (see circle icon below), it is turned off.



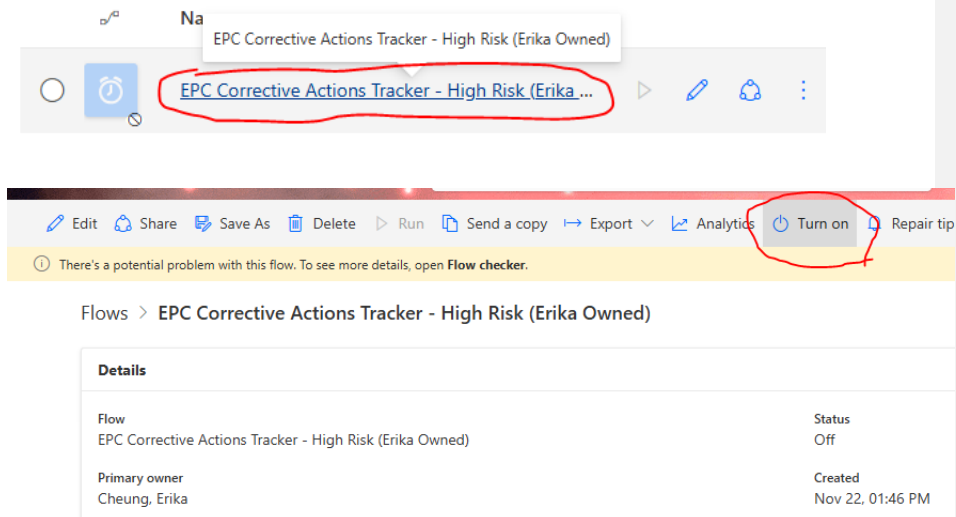
+ New flow ▾ ← Import ▾

### Flows





Cloud flows Desktop flows Shared with me


Name
 EPC Corrective Actions Tracker - High Risk (Erika ...)
 EPC Corrective Actions Tracker - Low/Med Risk (E...
 EPC Corrections Tracker (Erika Owned)

26. To turn on, click on the Flow Name to open the details and then click on “Turn On”.



Na  
EPC Corrective Actions Tracker - High Risk (Erika Owned)

 EPC Corrective Actions Tracker - High Risk (Erika... ▶   

Edit Share Save As Delete Run Send a copy Export ▾ Analytics  Turn on Repair tip

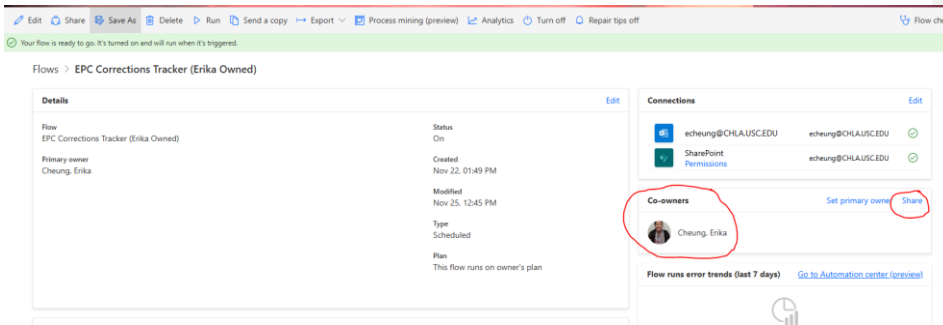
ⓘ There's a potential problem with this flow. To see more details, open [Flow checker](#).

Flows > EPC Corrective Actions Tracker - High Risk (Erika Owned)

Details	
Flow EPC Corrective Actions Tracker - High Risk (Erika Owned)	Status Off
Primary owner Cheung, Erika	Created Nov 22, 01:46 PM

## EM Process Summary – AARs and Action Item Trackers

### 27. To add co-owners to the flow, go to the flow details page and click on “Share.”



### 28. Type a name into the “Enter names, emails, or user groups” field.

#### Co-owners

Adding an owner gives them full control of this flow, so make sure you only share with people you trust. They'll be able to add or remove other users as owners, access the run history, and can update, edit or delete this flow.

[Learn more](#)

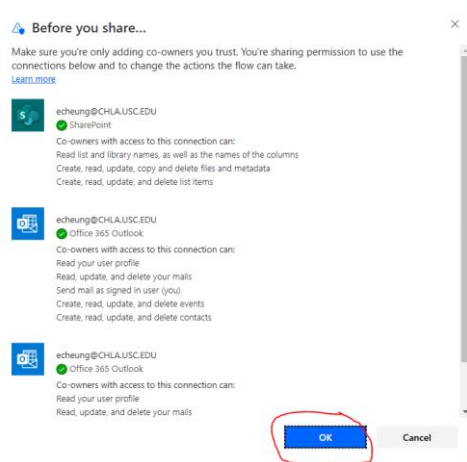
#### Users and groups SharePoint

Add a user or group as owner

Wright, Matt
mwright@chla.usc.edu

1 results are available. Use up and down arrows to review and enter to select.

### 29. Select “OK.”



### 30. Once shared, flows will migrate over to the “Shared with me” tab of “My flows”.

## Troubleshooting PowerAutomate Flows

1. If flow fails, manage your connections.
2. Remove duplicate connections for the connection type that failed.
  - a. If none, then just reauthenticate the connection that has a Red X icon and says “Reconnect”.
3. Once reconnected, go to the flow that failed by clicking on the specific date/time and click resubmit (to re-run the flow for that date).