# CEMP User Guide

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# Introduction to a Comprehensive Emergency Management Plan (CEMP)

A comprehensive emergency management plan is a designed framework to guide an organization's response to emergencies. This plan works to ensure the safety and well-being of individuals, minimize damage to property and facilities, and ensure a coordinated, efficient response to emergencies/disruptions. These emergencies can vary based on the hazards/risks the organization is susceptible to. There are various elements to a comprehensive emergency management plan:

- Risk assessment
- Emergency response procedures
- Communication strategies
- Resource management
- Training and education
- Evaluation mechanisms

# Accessing Your Plan

## Your CEMP Website

Your organization's branded web address will use the BOLDplanning.com platform address. For example, state.boldplanning.com or county.boldplanning.com
All platform URLs are unique and will be based on your organization's name. The name of your organization's emergency operations plan website is:

## Plan Login Screen

**BOLDPLANNING.COM PLANNING PLATFORM**

The centerpiece of your organization's emergency operations planning strategy is the BOLDplanning.com platform. This platform can be accessed through any internet browser and uses the latest internet security protocols to safeguard all your organization's data. You can access your plan through the internet. Your organization's branded web address will use the BOLDplanning.com platform address (e.g., state.boldplanning.com or county.boldplanning.com).

Each organization will have a main point of contact who will act as the primary point of contact for the entire process. Password access will be granted to the main point of contact, who can then grant platform access to other planning team members. In larger organizations with complex departments or remote locations, it may become necessary for each individual business unit to designate a separate main point of contact, request additional platform access, and develop their own unique plan for their operations. A user manager guide will also be provided to plan administrators.

This is a tool that gives plan administrators the responsibility to maintain and update a catalog of user accounts. The user manager tool is what you will use to create new accounts, edit existing accounts, remove old accounts, and assign users to plans as viewers, users, or administrators.

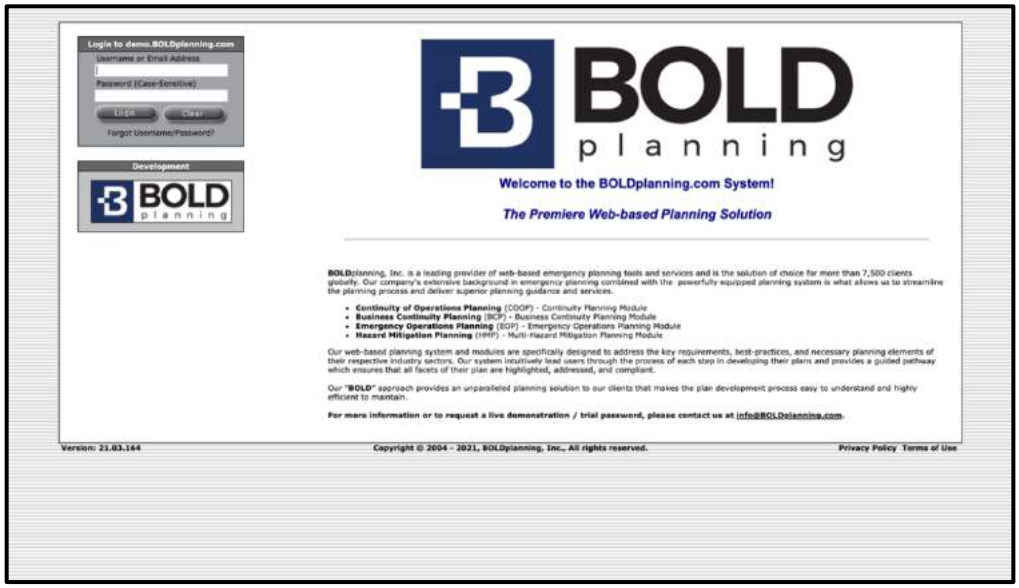



*Figure: Login Page*

## To Log onto the Platform

1. Go to your unique website and find the login window in the top left corner.
2. Username: Enter the username provided by your project manager.
3. Password:  Enter the provided password. This is CASE SENSITIVE.
4. Click the login button to begin plan development.

First time users must enter some basic data for security purposes. The platform will prompt you to manage your contact information, customize your username and password, and answer two security questions that will be used to verify your identity should you lose or forget your access information in the future.

## The First Time You Log into Your Plan – New Users

The first time you log into your plan, you will have to complete the New User Screen. Enter your name and email then answer the two security questions that enable the "Forgot Your Password" functionality. On this screen, at the bottom, you are also given the opportunity to change your username and password.

1. Checkmark the box to customize your username and password.
2. Enter your new username – there are no requirements or restrictions for the format of the username.

3. Enter your new password – passwords must be strong with 8 characters or more and must contain at least one upper and one lower case letter, at least one number and at least one special character. Weak passwords will not be accepted by the emergency operations planning system. Your password must be STRONG (green) to be accepted.

### Changing Your Username and/or Password

If at any time you wish to change your username or password, click on My Account in the upper right-hand corner of any of the screens. Then click on the option to change your username or password.

### Forgetting Your Username or Password

Neither BOLDplanning nor your organization plan administrator maintains username and password lists. If you should happen to forget your username and/or password, you may request that the system send you an automated email reminder with that information.

1. Click the "Forgot Username/Password?" link located in the top left corner of the login screen.
2. Select your issue in the pop-up box (password, username, both username and password, trouble logging in with existing username and password, or requesting a username and password) and click "Submit."
3. Your username and password will be emailed to you. The BOLD helpdesk is also available at:
    - Help@BOLDplanning.com
    - 615-469-5558

## System Navigation

### The Plan Main Menu and Task Bar

The Main Menu is your home base for all your plan activities. You can get to the Main Menu from every screen by using the navigation bar at the top of the screen. From the Main Menu, you can access all other sections of your plan.

***Important:*** When you are using the emergency operations planning website, do NOT use your web browser's back arrow to return to a previous screen. If you do so, your work will NOT be saved and may result in the screen locking up.
Use the navigation bar across the top to return to the Main Menu or "People," "Places," or "Things" to navigate to other sections of the plan.

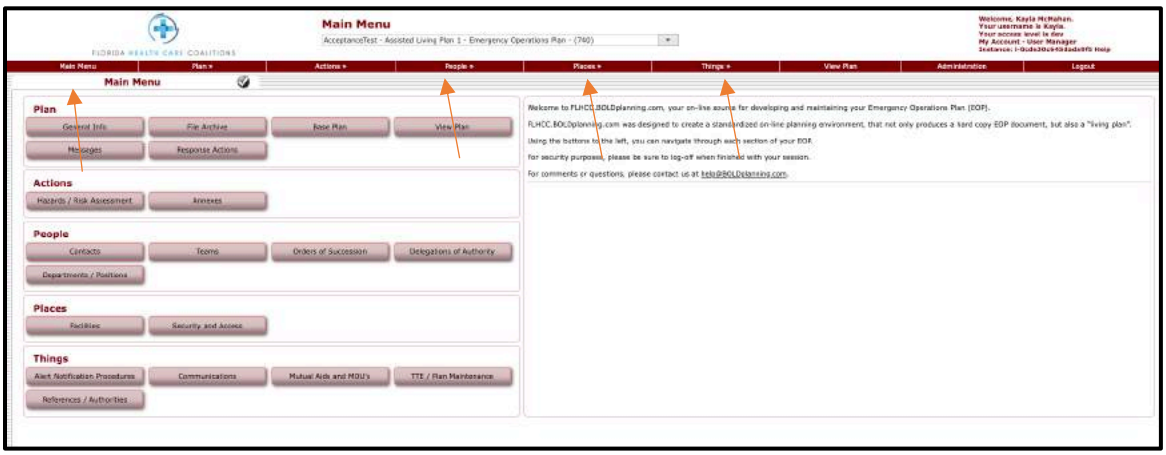



*Figure: EOP- Main Menu; Manage Your Plan*

# System Usage Hints

## Save Your Work

At the bottom of many of the input screens, there is a “Save” button. Make sure to click on this button before leaving the screen, or the data you have entered will not be saved. Scroll all the way down to see if there is a “Save” button on your data entry screen.

## “Import” Buttons

Many of the required tasks use the data in facilities, contacts, and other databases, and this data may already be available. Some of the tasks allow you to import data from a pre-populated database, referred to as the “Common Data Area” for your organization. Always check and use this import functionality first, before entering any data directly into your plan. It may save you a lot of time in data entry.

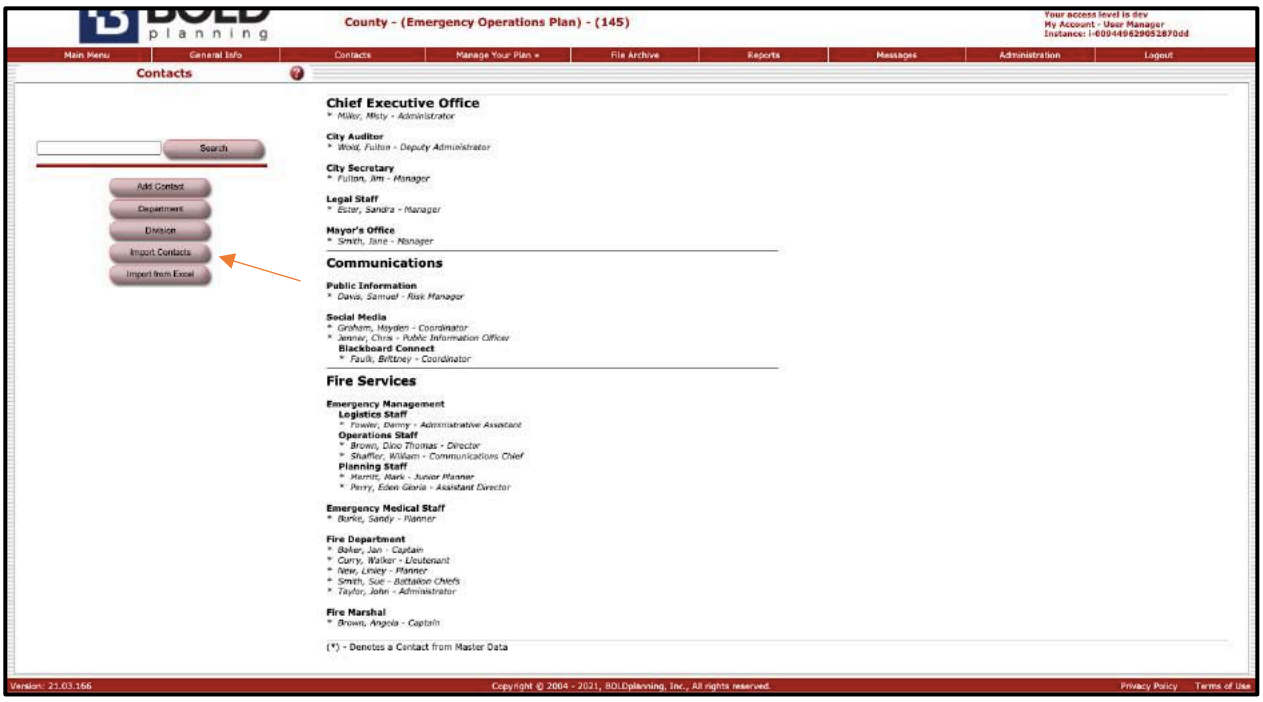



*Figure: Import Contacts: "Contacts" tab from BOLDplanning EOP DEMO*

# File Archive

## Overview

The purpose of File Archive is to provide a way to easily attach any electronic documents you may already have to your plan. Any document attached here will be backed up and protected off-site just like the rest of your plan. The File Archive is an online library for EOP-related documents and files to be stored for use during an activation, after-action reports, or exercise related planning. All file formats can be uploaded into the File Archive including MS Word, MS Excel, Adobe PDF, JPEG images, and Zip files.

Some examples of files you should consider adding include:

- Employee emergency contact information
- Spreadsheets of critical vendors/contacts
- Legal documents
- Maps of facilities
- Standard operating procedures

Note that any documents attached here cannot be changed. If you have new versions of your documents, you must again attach the newest version to your plan as described here. It is your choice as to whether you wish to delete the older versions or

keep them as an historical record.

There is no report for the File Archive section of the plan. Note that the File Archive items do not print in the reports. However, there is a bookmark noting that a related file exists, and it can be reviewed and printed separately.

Commonly used ICS forms are also automatically included and should be referenced when appropriate in Annex Actions and ICS Actions.

It is recommended that the EOP project manager use this resource by uploading a variety of documents that relate to response and planning. At a minimum, the following types of documents should be considered for upload:

- Site photos, building plans, maps, chemical spec sheets or MDS data.
- Standard operating procedures (SOPs) and other training documents related to the performance of essential functions.
- Prior EOPs or response annexes for reference, or copies of other associated regional response plans.
- Signed copies of memorandums of understanding (MOUs).
- Human resource policies related to the pandemic activations or telecommuting needs.

## How to Upload to the File Archive

1. To access the File Archive, click the File Archive tab located near the top of the platform/page.

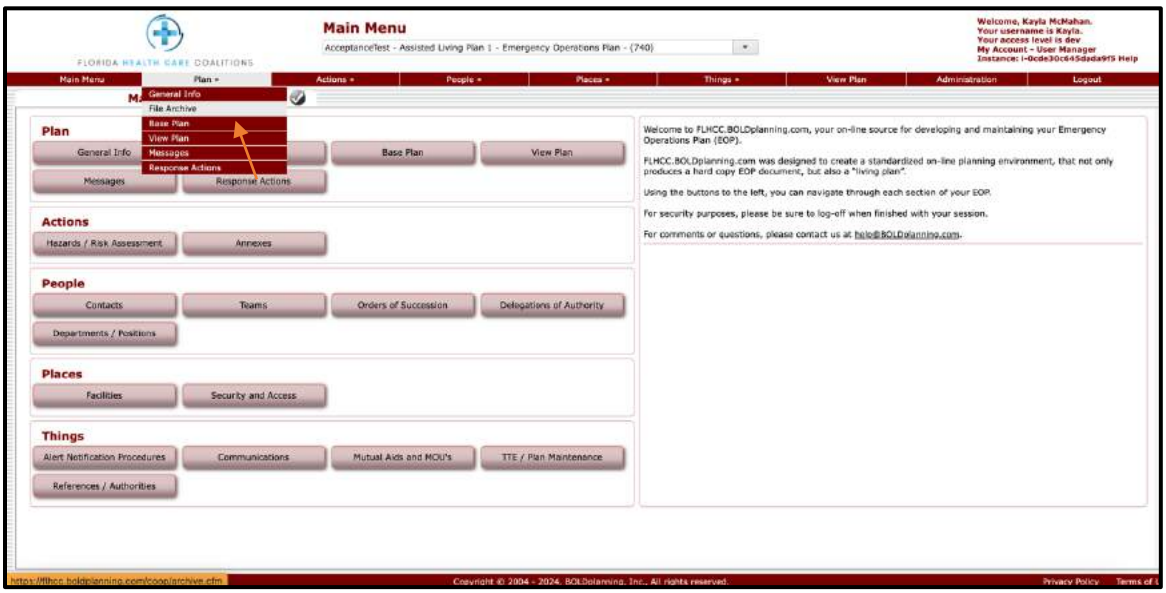



*Figure: File Archive Tab*

2. To upload a file, click the "Upload File" button located at the top/middle of the platform.

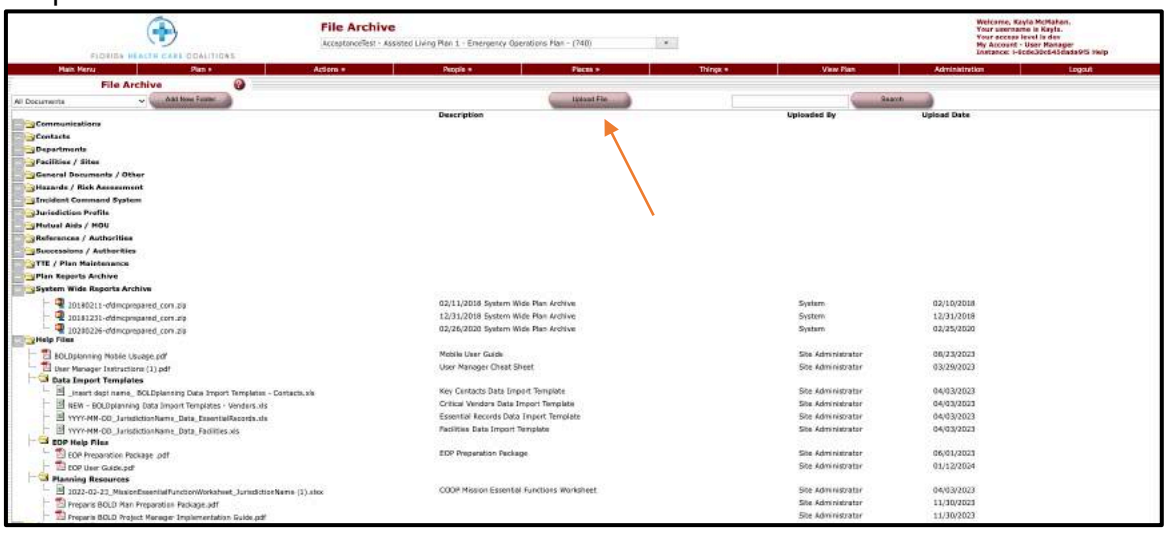



*Figure: Upload File Button*

3. Once the "Upload File" button has been clicked, follow the directions provided:
    1. Choose the category. What folder (contacts, facilities, teams, orders of succession, etc.) should the file be placed in? Use the drop-down menu that says, "Select Folder" to select the category (see orange arrow).
    2. Under step 2: Description(s) and Select the File(s), click the first "Choose File" button. This will open files on the computer, so the file can be chosen from the files on the computer and uploaded to the platform (see red arrow).

1. If a description is needed for the file, type in the description inside the text box (see green arrow).

c. If there is more than one file that needs to be uploaded, use the other choose file buttons to upload more than one file at a time.

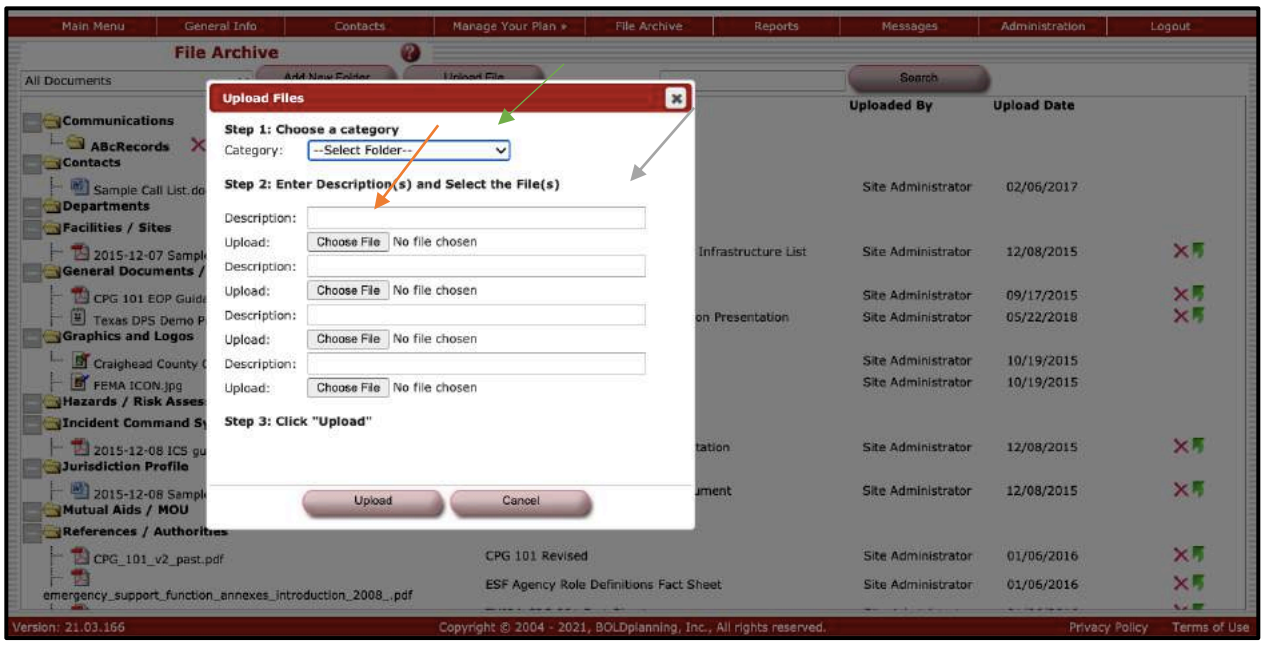



*Figure: Selecting Folder, Choosing File, and Description of File*

4. When the file has been chosen, the category/folder has been assigned, and a description of the file has been written, click the "Upload" button at the bottom. This will upload the file to the chosen folder (see red arrow).

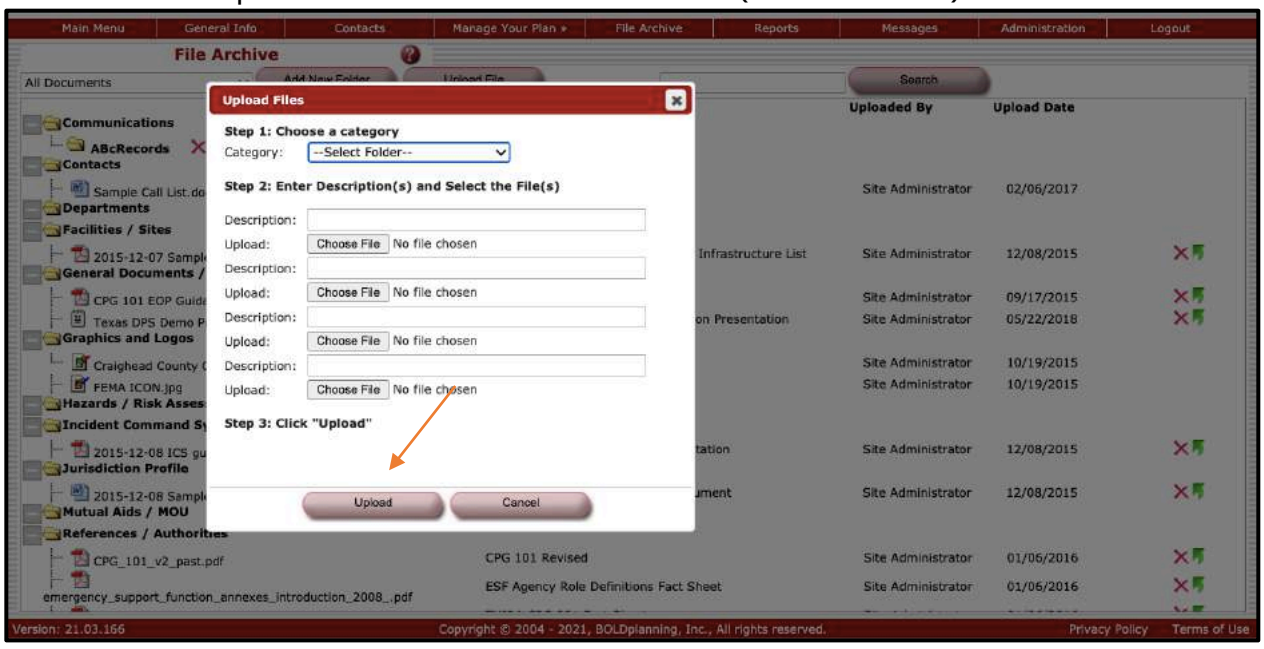



*Figure: Clicking Upload*

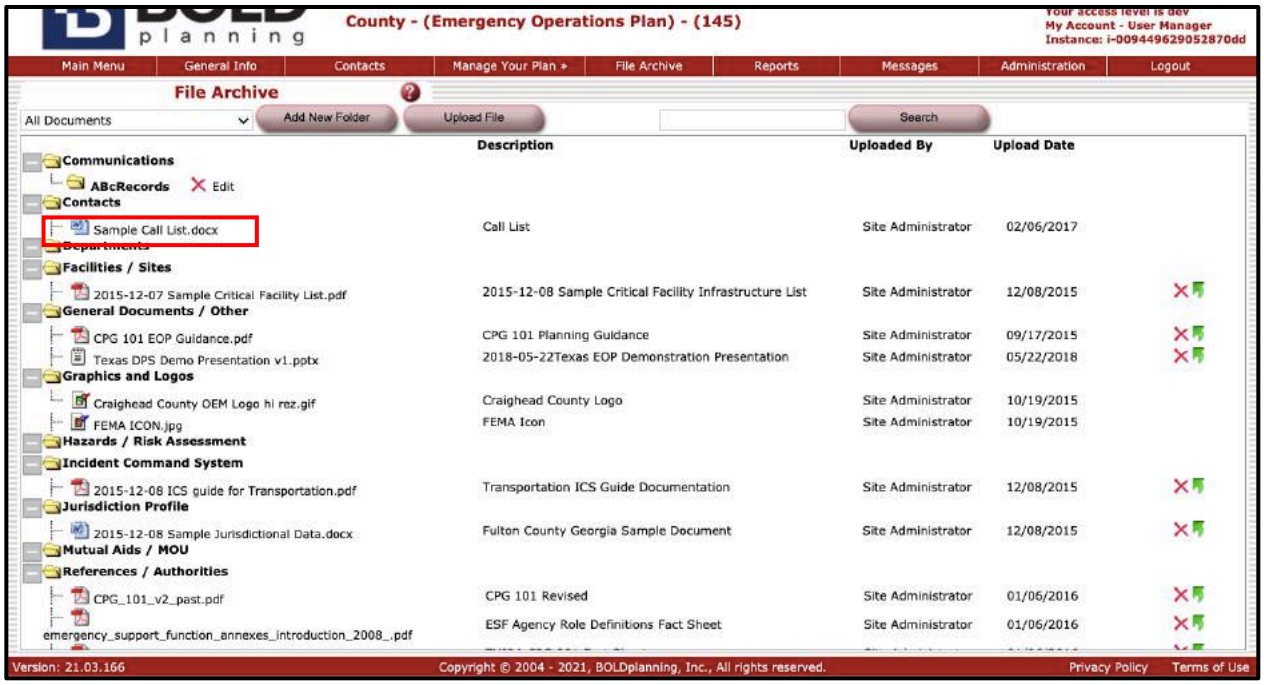



*Figure: File Uploaded to Correct Folder*

If you wish to delete a file, click on the red ✖ to the right of the file. Replacing a file can be done by using the green arrow. It can also be done by deleting and then reuploading.

# Facilities/Sites

## Overview

You want to make sure you identify all facilities where staff works on a regular basis, but also those where emergency response actions will take place, or alternate locations used for supplies, medical treatment and triage or information distribution and coordination. Likely candidates include hospitals, fire stations, salt and sand highway depots, or other critical resource hubs.

- These facilities should at a minimum also include your emergency operations center and its alternate location. You select these from the Facility Type drop down. These can be as simple as a shelter location or as detailed as a strategic stockpile distribution point.
- Fill this information out as completely as possible, including zip codes, as it will provide an accurate hot link to a Google map of your site in the list of facilities.

- You also have a dialogue box where it is possible to add important comments about the facility; for instance, if it is only possible to enter on the south side or by the stairs during a power outage. If it is important in your area (especially rural, obscured, on a slope or odd geographic feature) give its latitude-longitude as well.

## Adding a Facility/Site

1. Click on the "Facilities/Sites" button on the Main Menu.

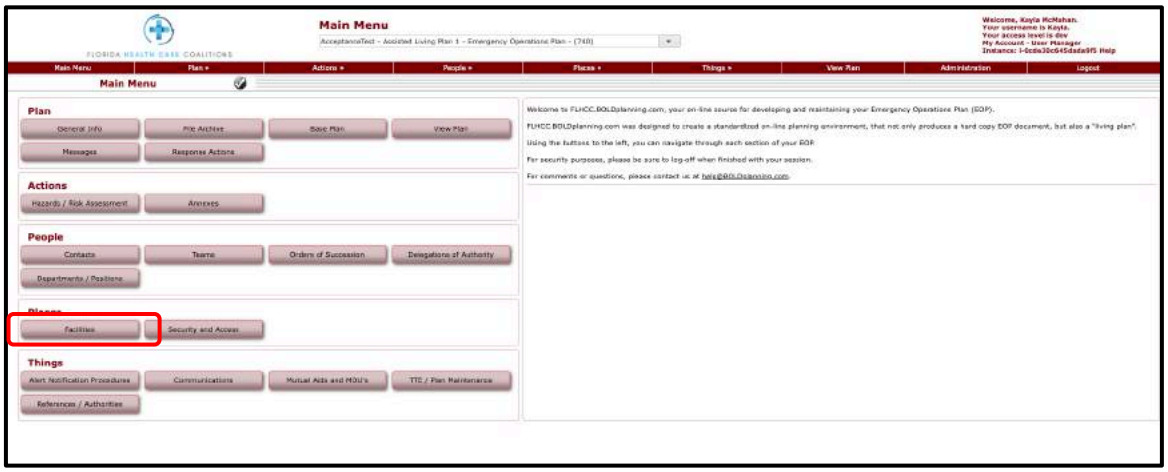



*Figure: Facilities/Sites button on the Main Menu*

2. Click on the "Add New Facility" button.

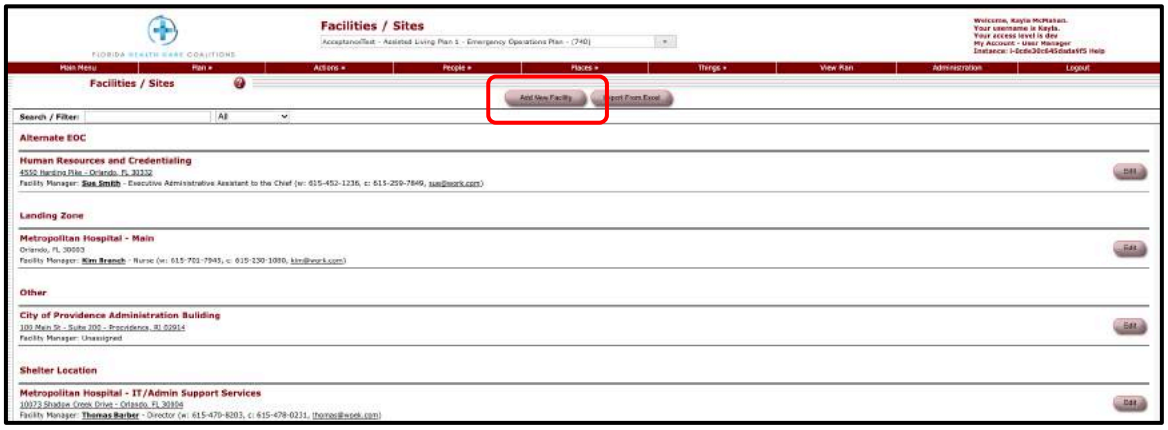



*Figure: Click the Add New Facility button*

3. Fill out the Facility Type by using the drop-down menu (emergency operations center, alternate eoc, department operations center, warning point, etc.)

*Figure: Choosing a Facility Type*

4. Fill out the facility information after choosing a facility type.

*Figure: Filling out Facility information*

5. Make sure to add the facility manager. If the facility manager is not listed in the drop-down menu, go to contacts and add them. After adding them in contacts, go back to the facility and choose them in the facility manager drop-down.

*Figure: Choosing a Facility Manager*

6. To edit an existing facility, click the "Edit" button to the right of facility you wish to edit.

# Adding Facility Resources

1. Click on the "Facilities/Sites" button on the Main Menu.

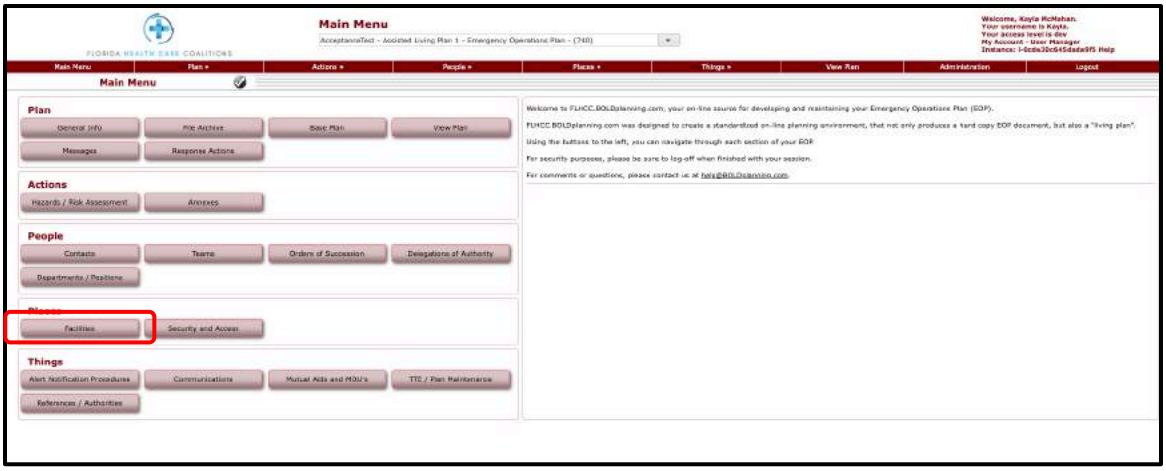



*Figure: Clicking the Facilities/Sites button on the Main Menu*

2. Either click on the edit button for an existing facility or click the "Add New Facility" button to add a new facility.

*Figure: Clicking Edit on a Facility/Site*

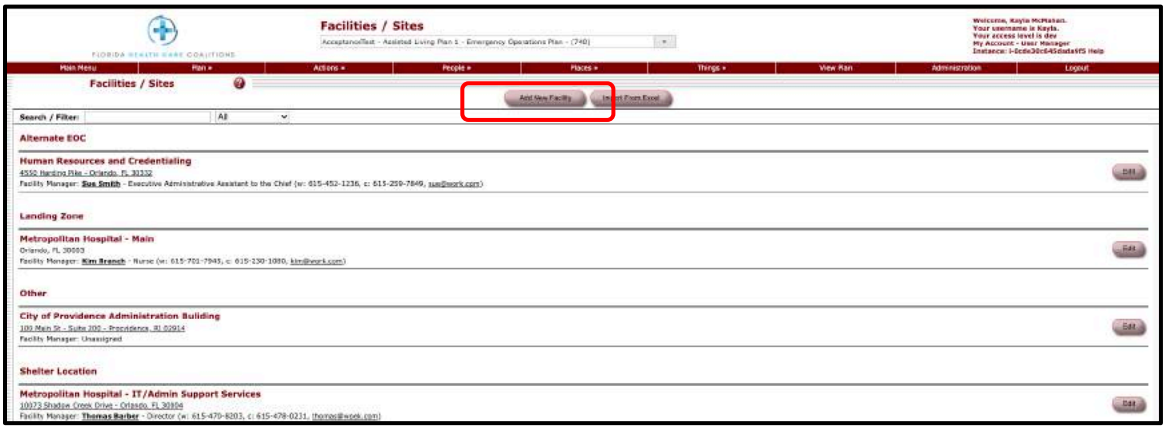



*Figure: Clicking the Add New Facility*

3. Click the “Facility Resources” button on the bottom right.

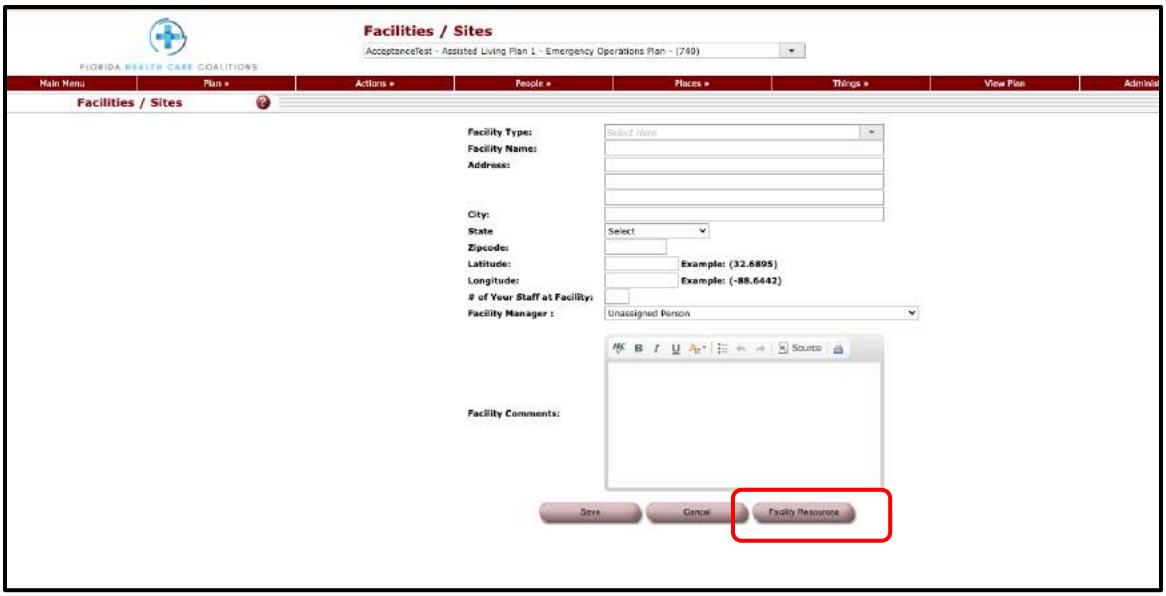



*Figure: Clicking the Facility Resources Button*

4. Fill out the quantity, description, type, and disposition of each resource. When adding each resource, make sure to click the green plus sign.

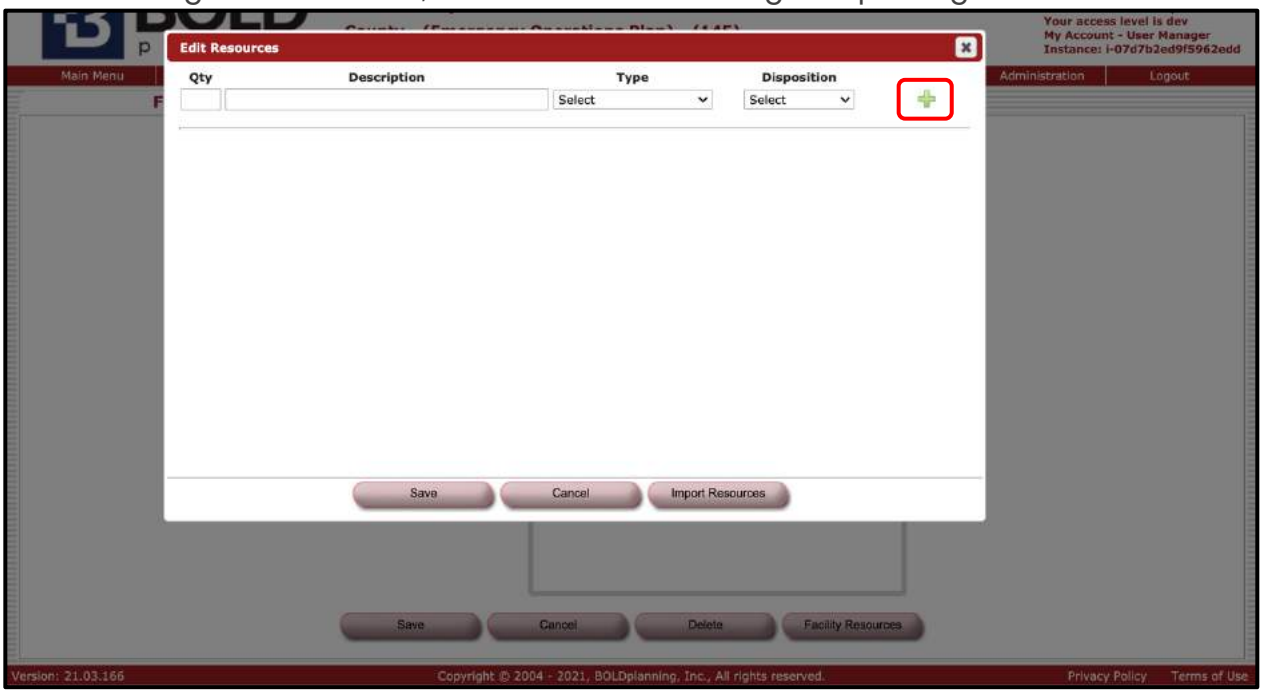



*Figure: Listing Resources and Clicking the Green Plus Sign*

5. After adding the resources, click the “Save” button.

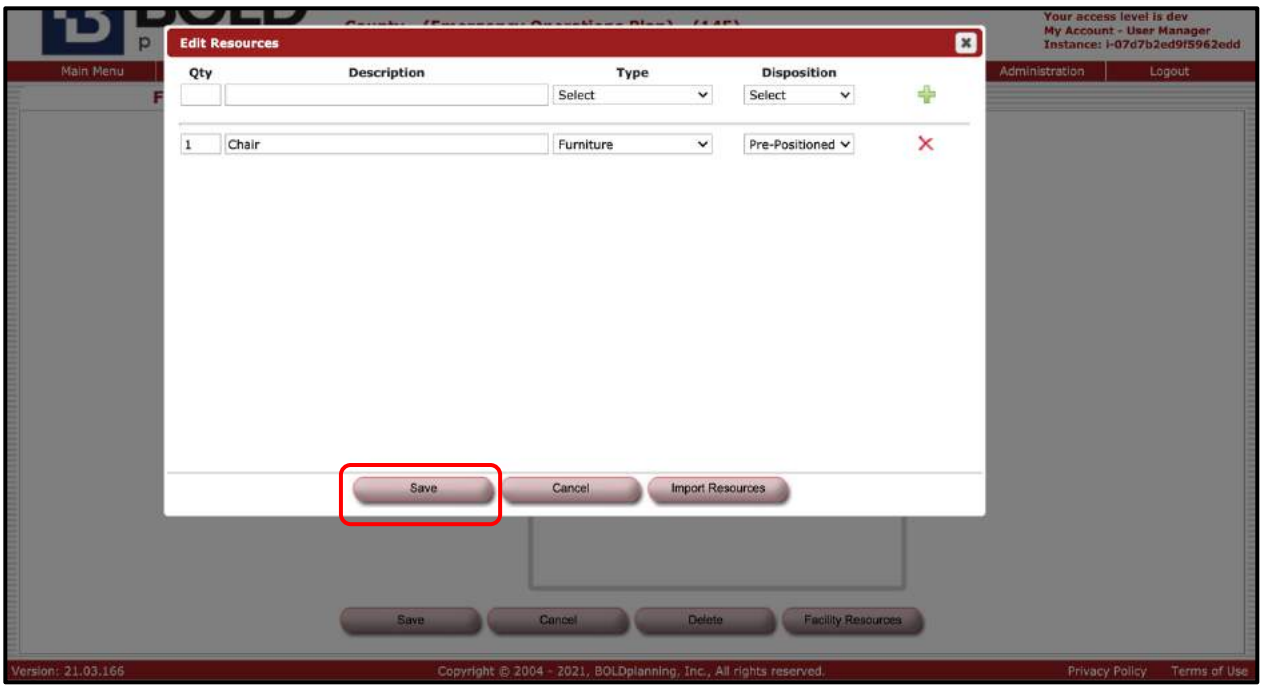



*Figure: Adding Resources and Clicking the Save Button*

6. Make sure the resources are added to your facility and then click "Save."

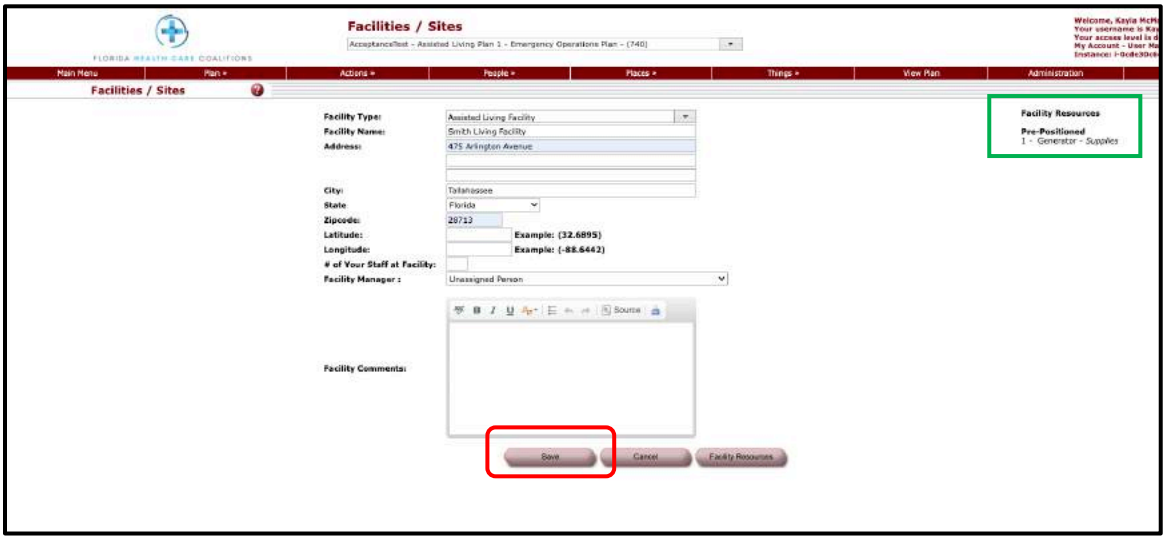



*Figure: Checking Resources and Clicking Save*

# Contacts Database

## Overview

The contacts database is where you add contact information for the people who play a role in or are mentioned in your emergency operations plan. Be sure to include contact information for personnel within your organization as well as contacts who are outside your organization, such as vendors.

Identify all key staff involved with the EOP planning and with the annex actions or activation responsibilities. Typically, 20-40 contacts will be entered representing the positions listed above and their primary support staff.

- The human resource coordinator should be the primary resource for this information.
- For member type, most contacts will be key staff.
- Remember to note their title if they have one and add things like telecommuting hours, administrative assistants' hours, or that the office is shared with another department, in the comments field.
- Adding a work email is essential, and while personal emails are optional, they help ensure good communication during adverse events. (Be sure to check your internal policies and regulatory requirements regarding privileged, confidential, or protected data transmission before adding personal emails, however.)
- Develop the department and division lists with the drop-down boxes in the top-right corner. Your entries here should match the current organizational structure/chart.
- Use the Locations Quick Pick to assign staff to the facility where they normally work.

## Adding Contact Using Import

1. Start by clicking the "Contacts" button on the Main Menu.
2. Click on "Import Contacts" button. (Pictured below)
3. Select the boxes to the left of any names listed that are contacts for your organization. Be sure to look through the entire list. Some people may be listed near the bottom of the list in a sub-group.
4. Click on the "Import Contacts" button.

5. Check to see that the desired contacts are now in your list. Check to see if the names are organized into the appropriate sub-group or department. If they are incorrectly listed, or if there are any other errors, edit the contact's name.

*Figure: Importing Contacts*

## Adding Contact Without Using Import

1. In the Contacts Database, select Add New Contact.
2. Choose a member type: key staff (leadership), staff, non-staff (contractors)
3. Enter first, middle, and last names.
4. Using the drop-down or by typing directly in the boxes, add the employee's department and division.
5. Enter the employee's Title.
    a. Tip: It is helpful to think of this contact card as belonging to this position, rather than the person. Positions remain while the person who fills them can change. Normally, a contact is assigned to a team or order of succession based on their position, so when that person leaves you will replace them, but that position will remain on those teams, orders, etc.
6. Using the Location Quick Pick or by typing directly into the fields, enter the employee's primary work location.
7. Add the employee's contact information. The standard points of contact for each person in your plan are work number, cell number (work and personal), work email, and personal email.

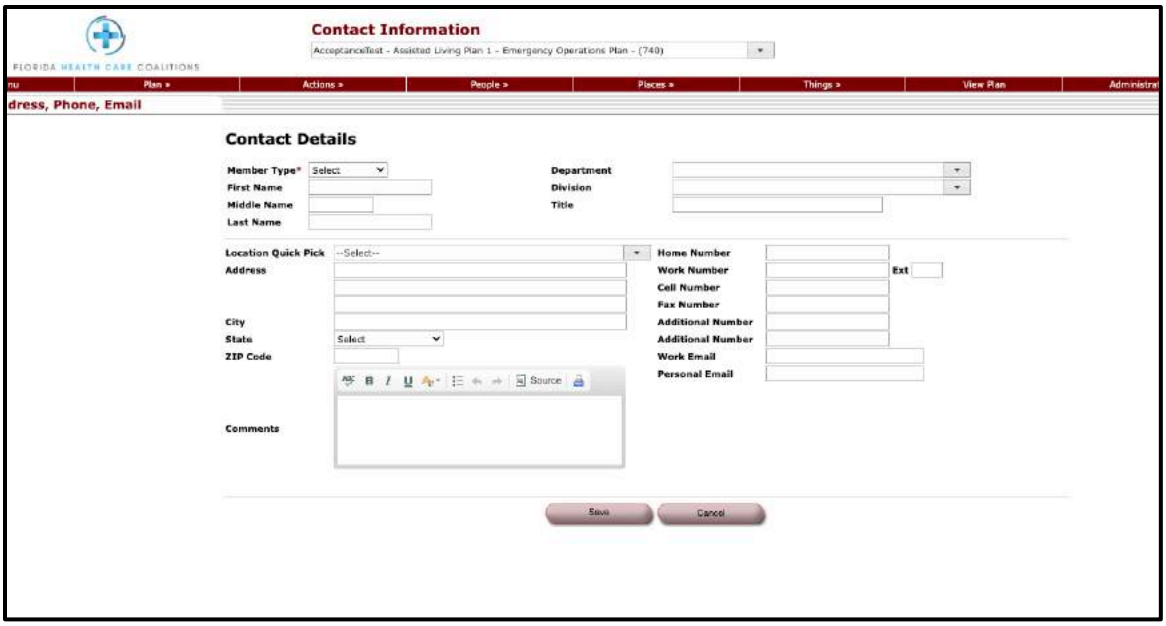



*Figure: Contact Details Form*

## Editing or Deleting a Contact

1. Start by clicking "Contacts" on the Main Menu.
2. Click on the name of the contact you wish to edit.
3. Edit any of the displayed data for this contact.

4. Click “Save.”
5. Check to see that the contact is listed appropriately in the Contacts Database.

## Reassigning a Contact

If an employee leaves or transfers, users can now easily make multiple assignment changes simultaneously rather than changing each of that person’s assignments individually.

To reassign, select a contact.

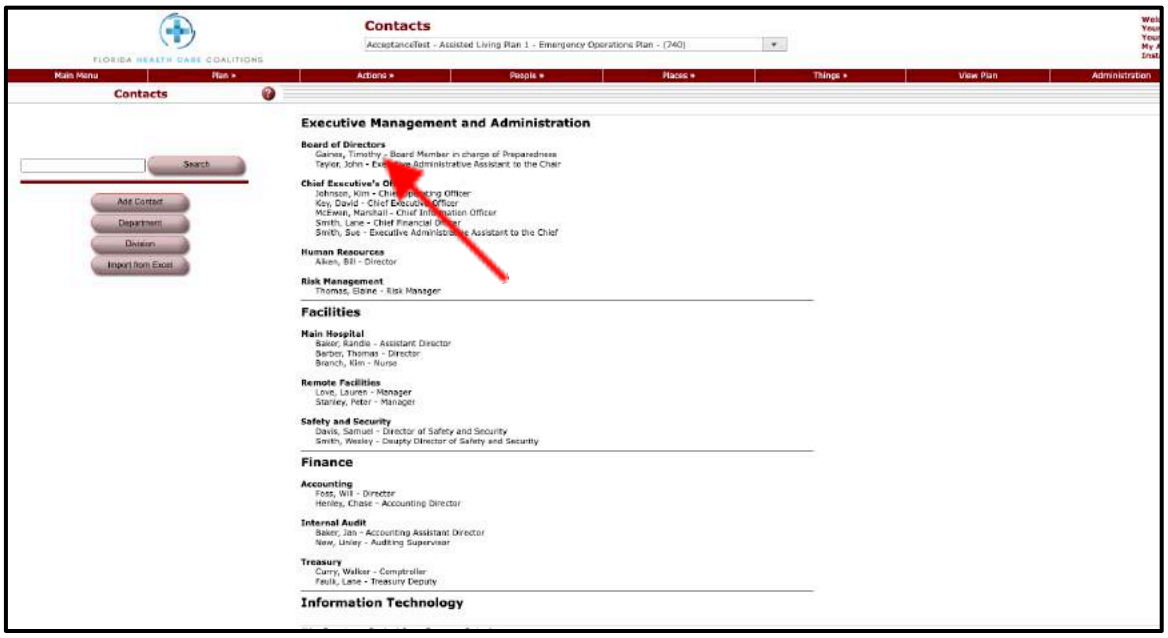



Figure: Selecting a Contact

Click on ‘Reassign Roles.’

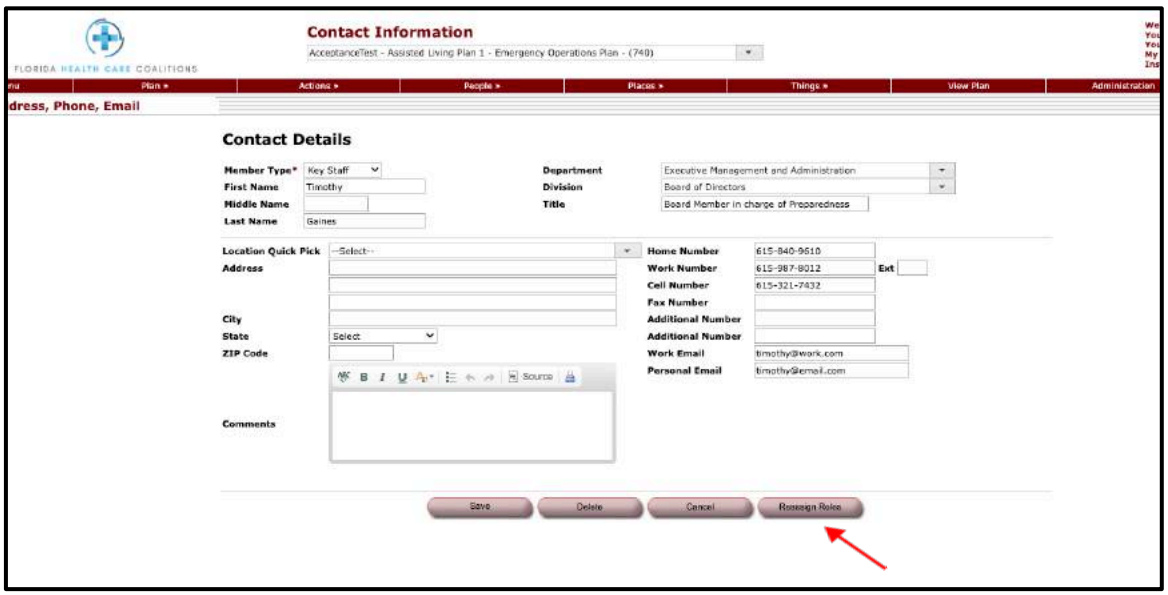



Figure: Clicking 'Reassign Roles'

Select the person you wish to reassign the roles to from the drop-down and the roles you wish to reassign. When you are finished, click 'Reassign.'

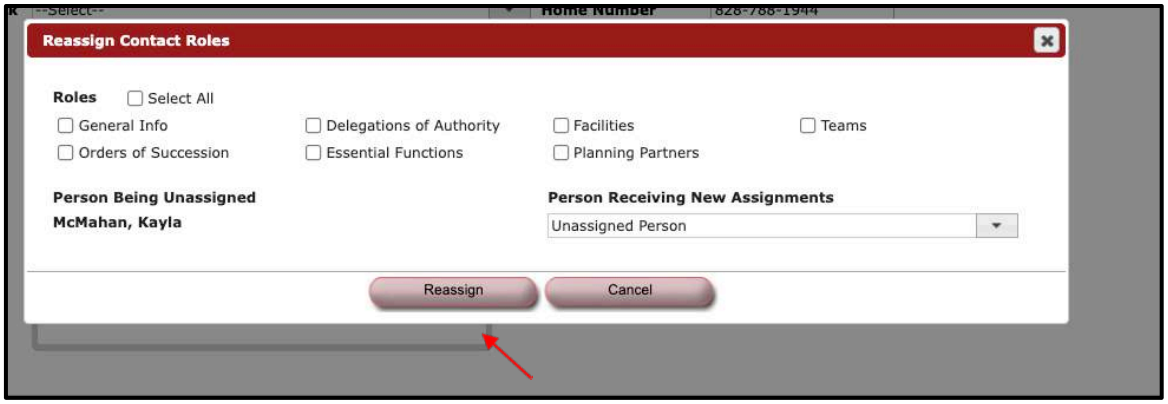



Figure: Reassigning a Contact

## Adding a Vendor

The following steps should be taken to add vendors to your Contacts Database:

1. In the Contacts Database, select "Add New Contact."
2. Choose Vendor/Other from the Member Type dropdown.
3. Enter first and last names of the vendor point of contact.
4. Using the dropdown or by typing directly in the boxes, add the name of the vendor/company.
5. Enter the title of the vendor point of contact.

6. Enter a description of the product/service, and a related contract number or reference number.
7. Enter the vendor's work address.
8. Add the vendor's contact information: work number, cell number, and work email.

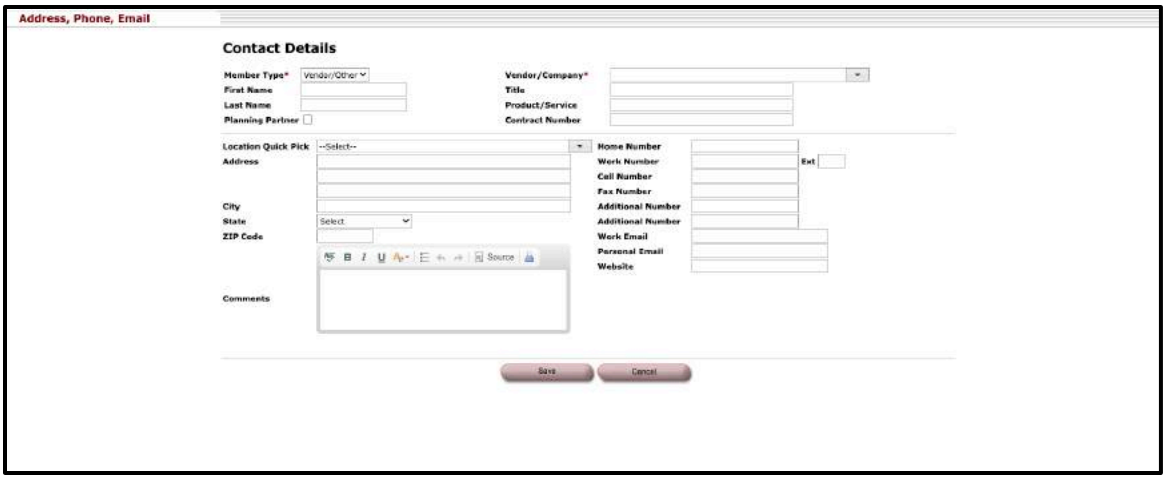



*Figure: Adding a Vendor to your Contacts database*

# Teams

## Overview

There are teams that you will need to identify for your plan. You have the option of creating new Teams, for any purpose you wish, and you can give the new team(s) any name you wish to call them.

## Adding a Team

1. Click the "Teams" button on the Main Menu.

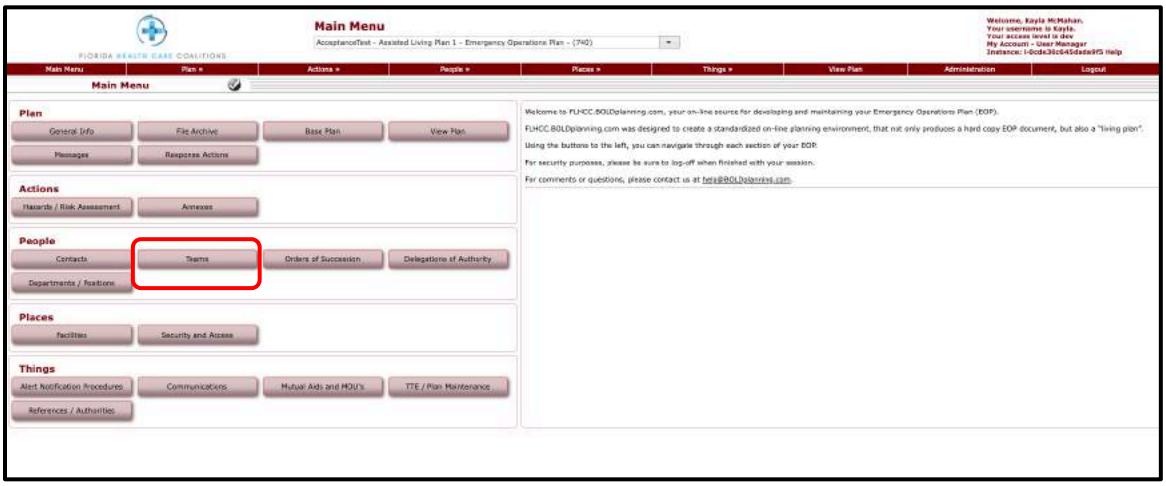



*Figure: Clicking the Teams button on the Main Menu*

2. To add a new team, click the "Add/Edit Teams" button at the top.

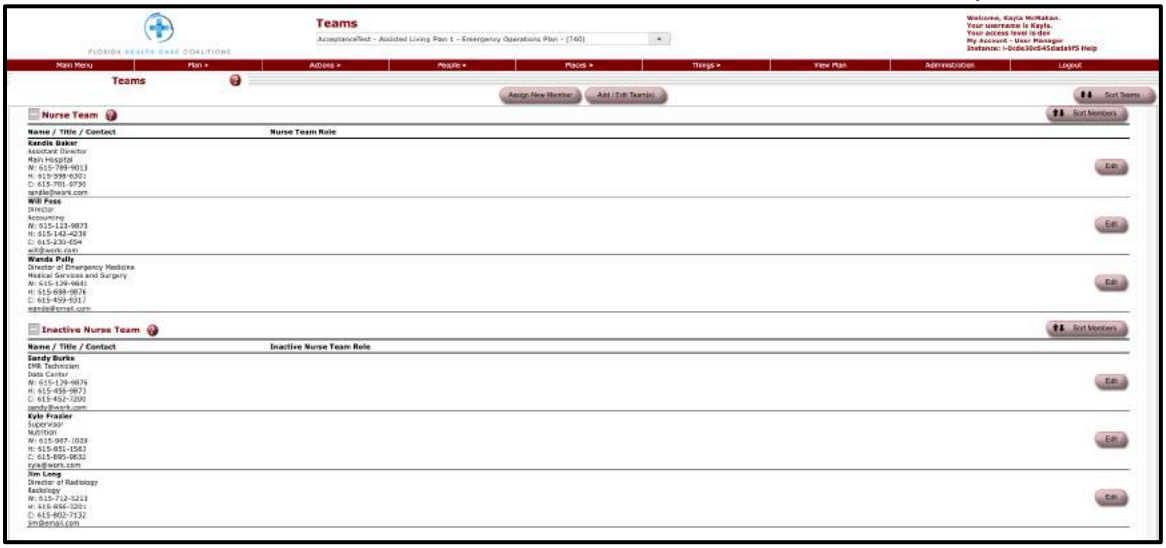



*Figure: Clicking the Add/Edit Team button*

3. Using the "Choose Team" drop-down menu, select "New Team" and then type the team's desired name. Enter a brief description for the team below the team's name, as well. After all information is entered, click the "Close" button.

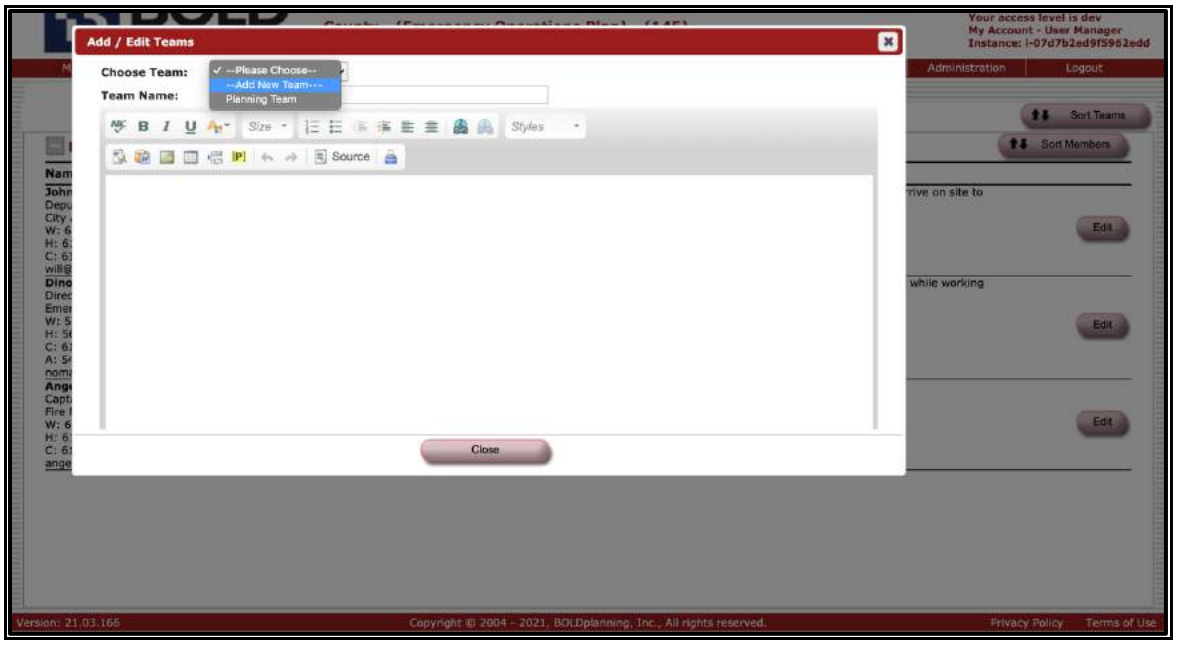



*Figure: Adding a New Team*

4. To assign a member to a team, click the "Assign New Member" button.

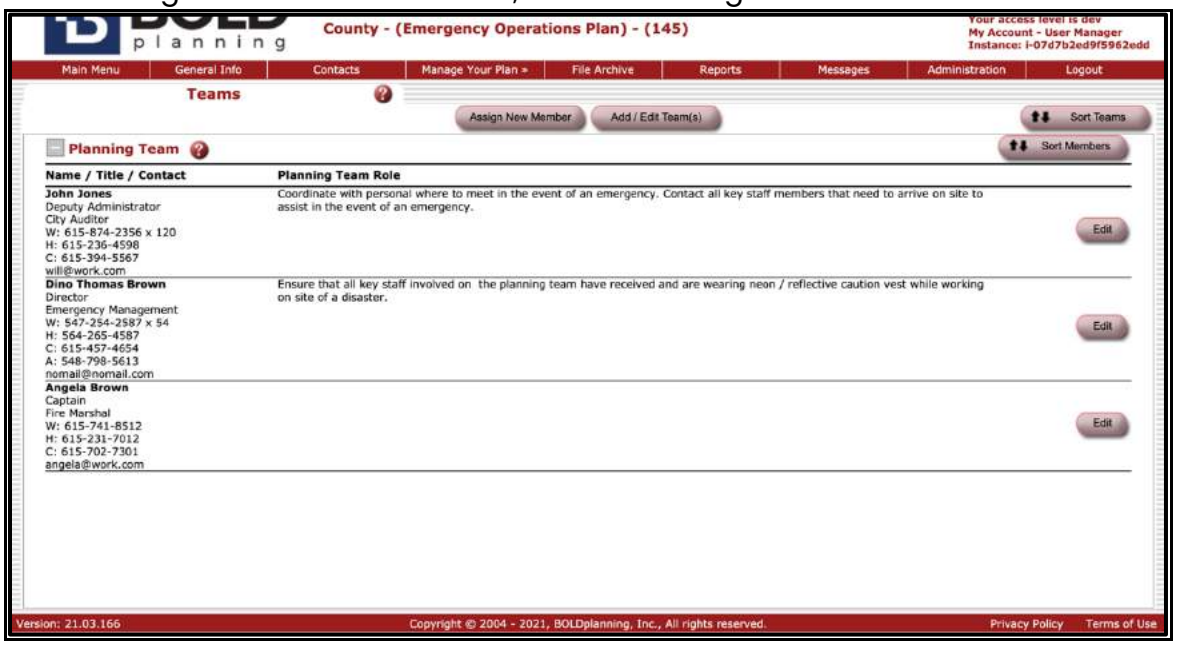



*Figure: Clicking the Assign New Member Button*

5. Select the team you wish to assign the new member to and then use the "Member" drop-down menu to select the contact you wish to add to the selected team. If the member is not in the "Member" drop-down menu, go to contacts to add the contact in.

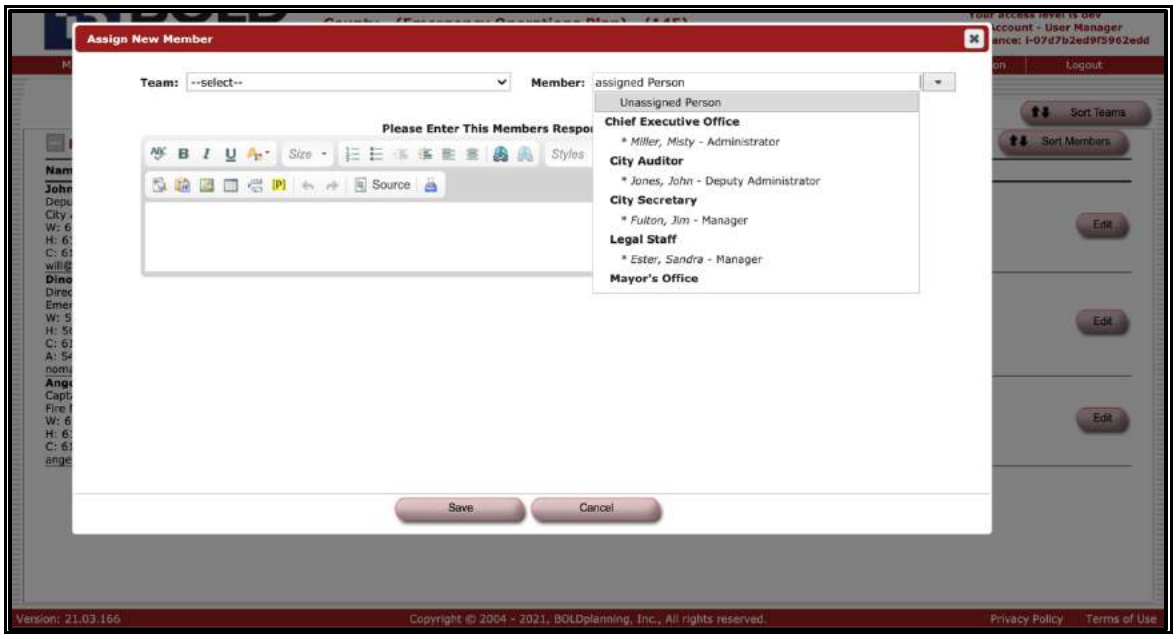



*Figure: Selecting a Team to Assign a New Member*

6. After the member is selected, enter the member's responsibilities/roles for the selected team. When finished, click "Save."

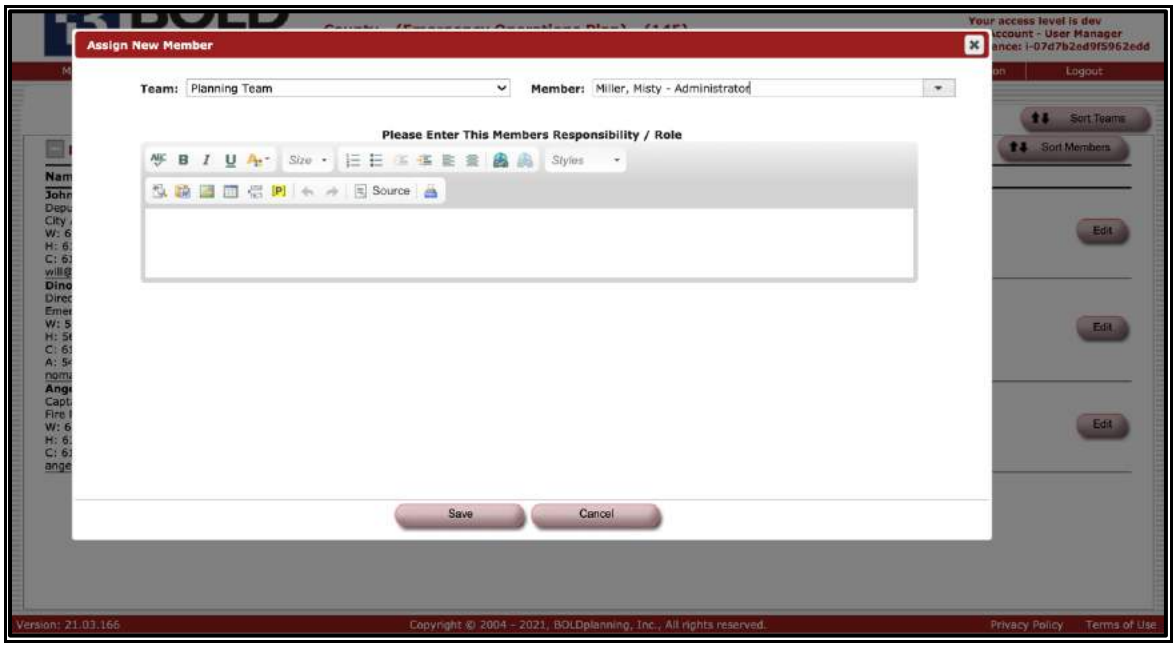



*Figure: Describing a Member's Responsibilities/Roles and Clicking Save*

7. To edit an existing member's responsibilities/roles, click the "Edit" button to the right of the member's information.

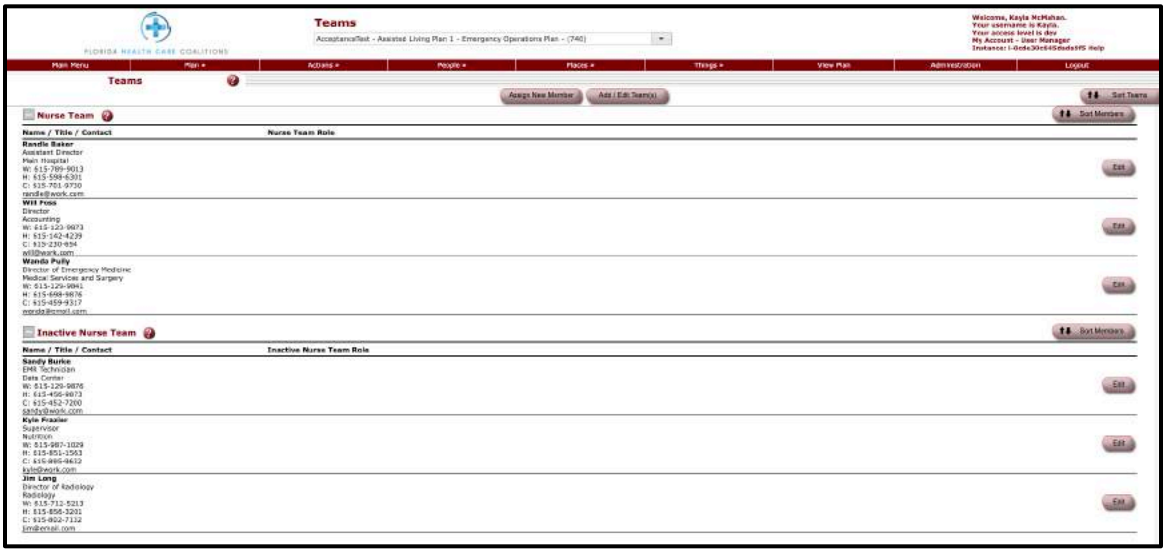



*Figure: Editing a Team Member's Responsibilities/Roles*

# Orders of Succession

## Overview

The purpose of orders of succession can be summed up by the question "Who comes next?" This section of the continuity plan pre-identifies who will step in for personnel in key leadership positions/titles if they become unavailable. Use the "Help" button in the Orders of Succession screen to see a more detailed description of purpose for this section.

Note that the person who officially has the role under consideration should be listed as the primary. The individuals who will step in if the primary is not available are called alternates. Identify at least two alternates for every primary if possible.

You should complete the General Information section before completing Orders of Succession. If you have entered the name of your administrator in General Information, your administrator's name will then appear automatically in the Orders of Succession list.

# Adding Orders of Successions

1. Click the "Orders of Successions" button on the Main Menu.

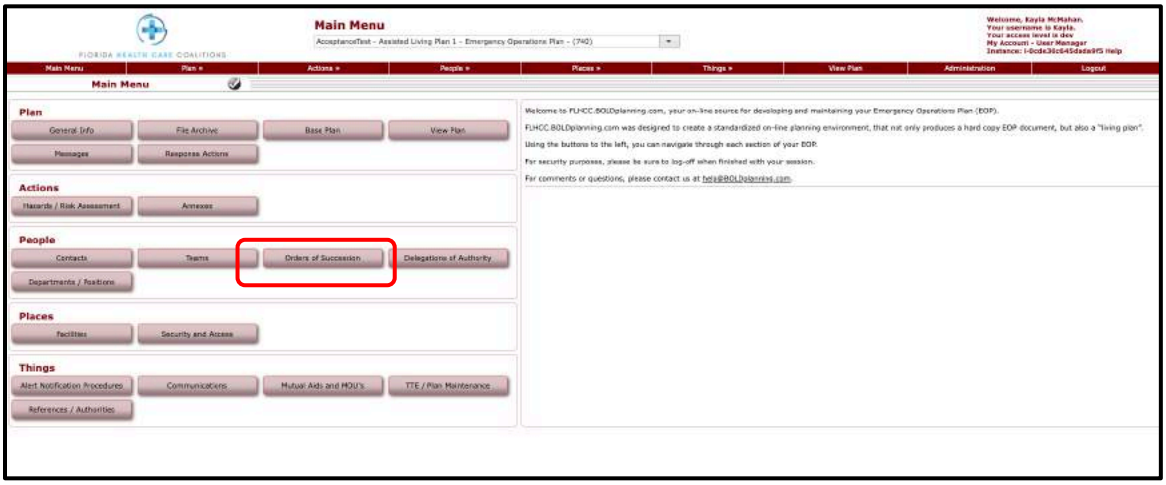



*Figure: Clicking Successions/Authorities on the Main Menu*

2. To start creating new successions for specific organizational roles, click "Add New Succession" at the top.

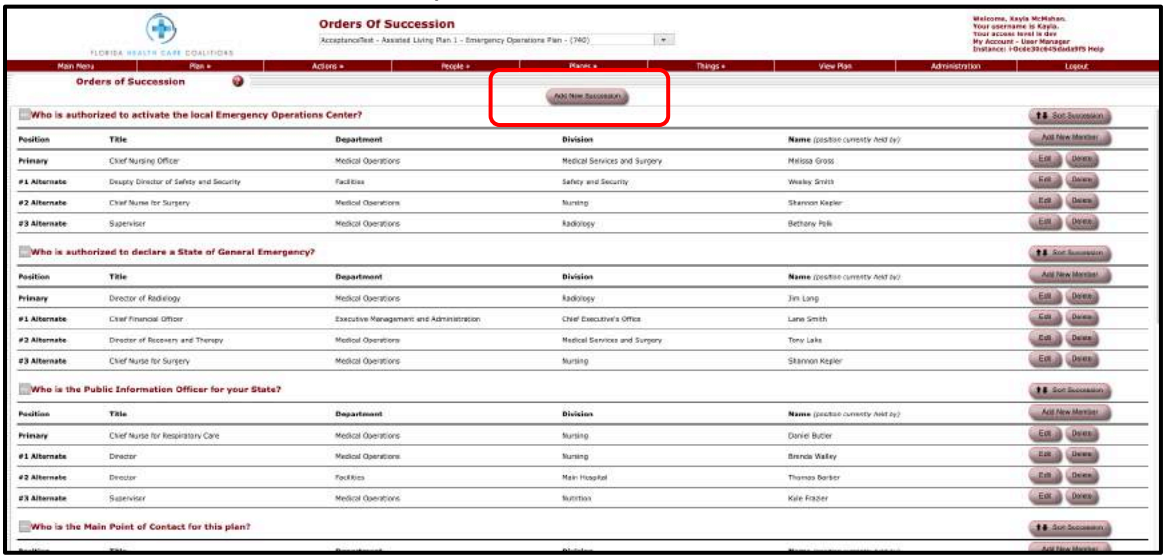



*Figure: Clicking the Add New Succession Button*

3. Enter the new succession for a specific organizational role and then click "Save."

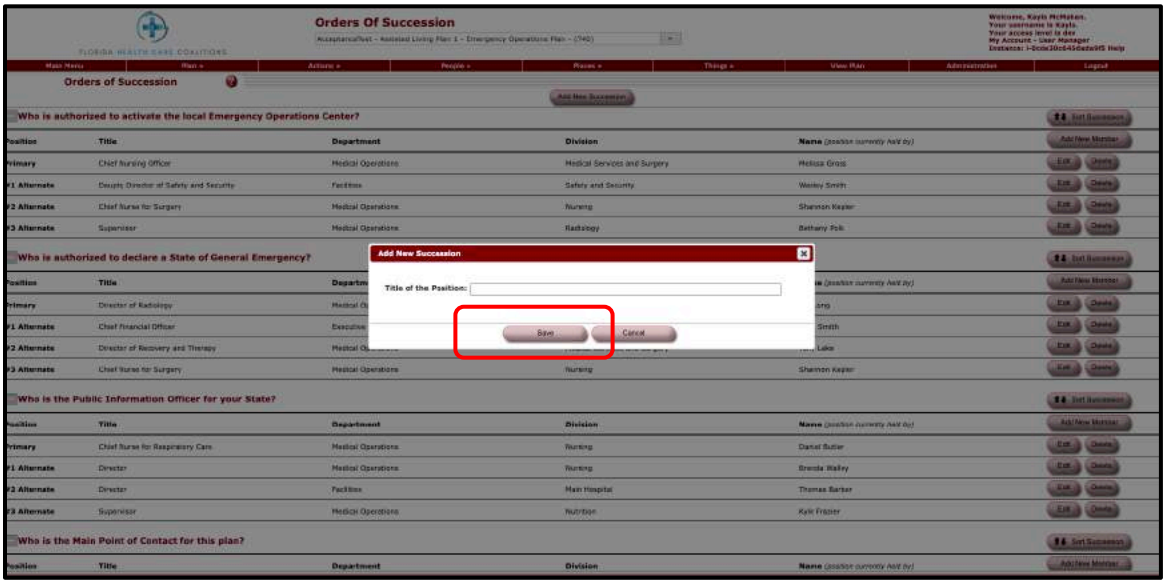



*Figure: Adding a New Succession and Clicking Save.*

## Adding Members to Succession Lines

1. Click the "Orders of Succession" button on the Main Menu.

*Figure: Clicking the Succession/Authorities Button on the Main Menu*

2. To add the primary for a created succession, click the "Add New Member" button on the right of the succession.

*Figure: Clicking the Add New Member Button*

3. Choose the primary from the contacts list provided. If they are not in the contact list, go to Contacts to add them and then proceed back to Successions/Authorities to add them in.

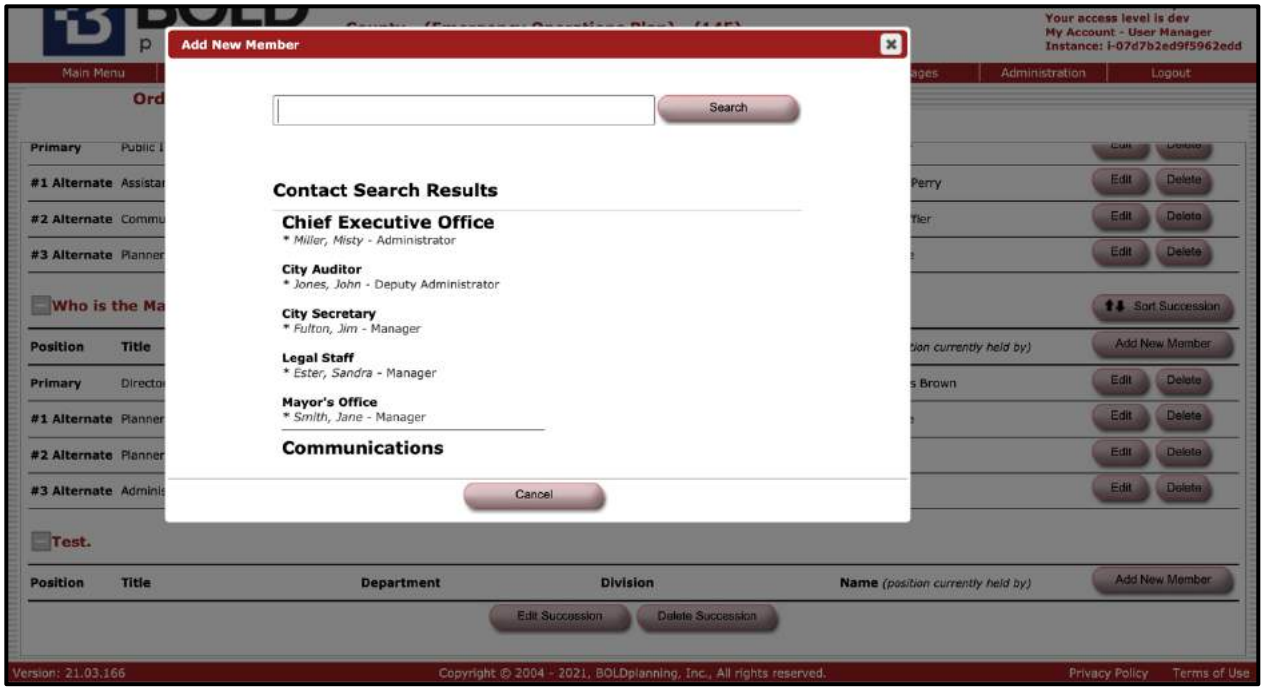



*Figure: Choosing a Contact for a Succession*

4. To add the alternates for the primary previously added, click the "Add New Member" button, again. To add more than one alternate, keep clicking the "Add New Member" button.

*Figure: Adding Alternates for a Primary of a Succession*

5. Choose the alternates from the contacts list provided. If they are not in the contact list, go to Contacts to add them and then proceed back to Successions/Authorities to add them in.

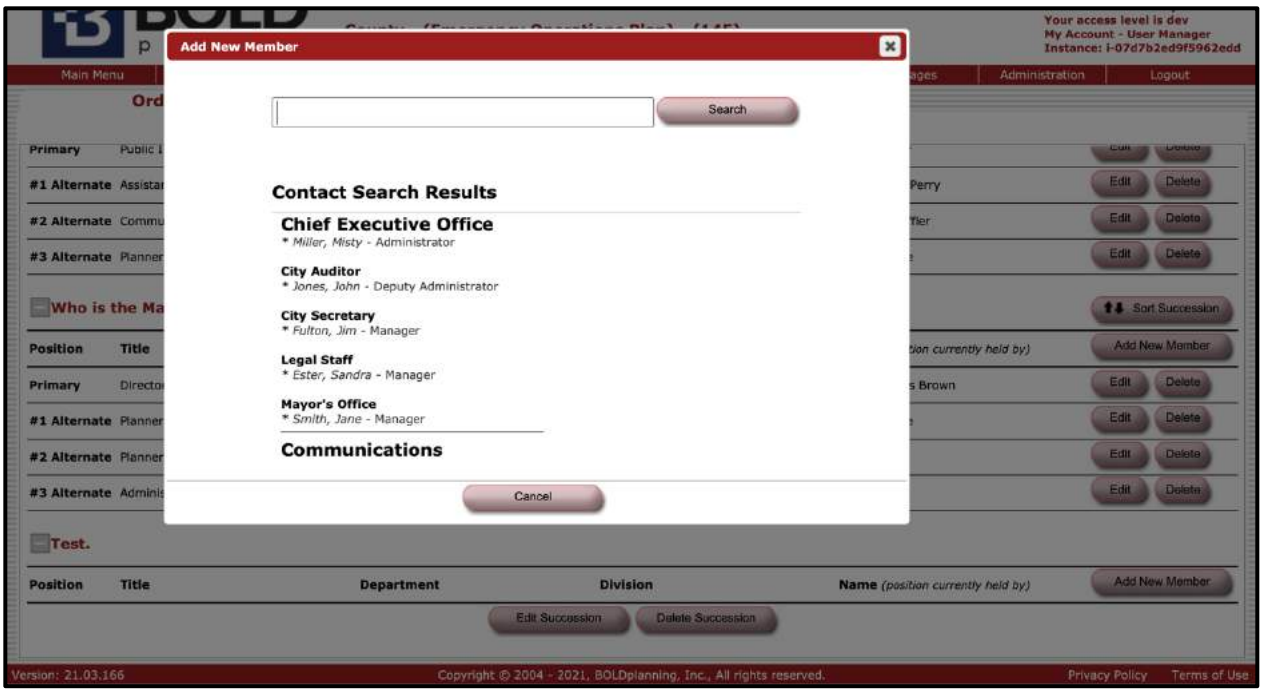



*Figure: Adding an Alternate*

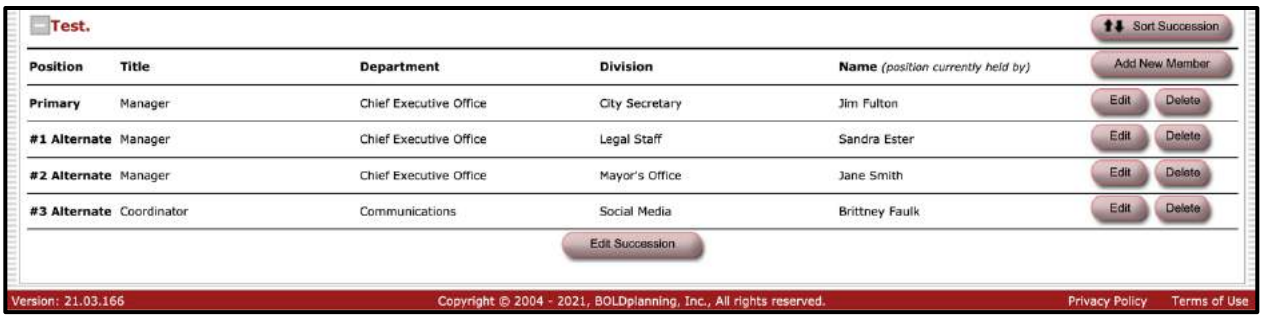



*Figure: Listed Alternates for a Primary*

6. To edit the primary or alternate for a specific departmental or jurisdictional role (the person who fulfills this role), click the "Edit" button on the right side.

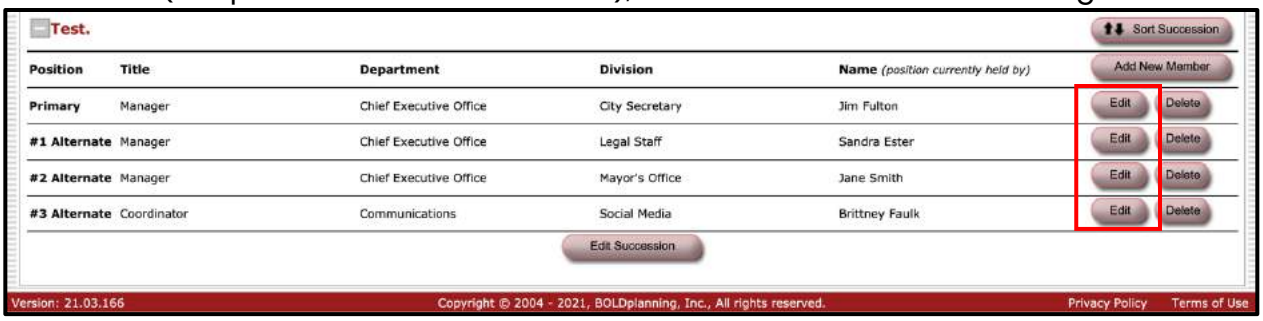



*Figure: Editing a Primary or Alternate*

7. To delete a primary or alternate for a succession, click the "Delete" button beside the "Edit" button.

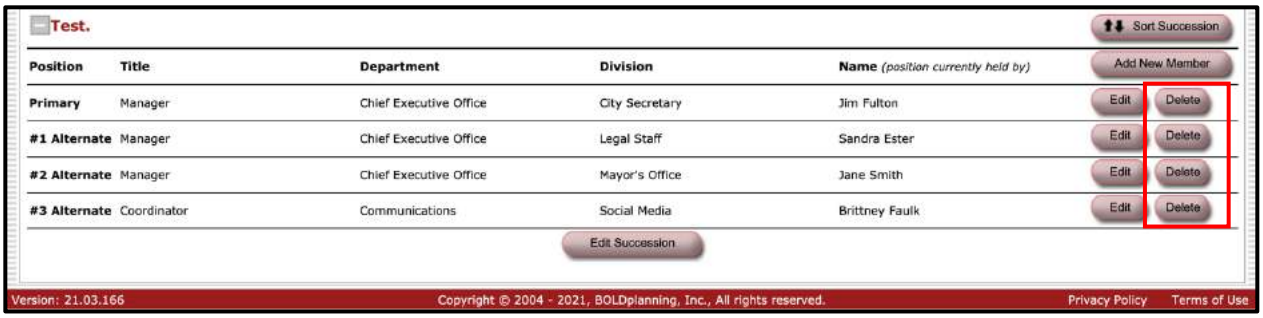



*Figure: Deleting a Primary or Alternate*

## Sorting Succession Lines

1. Click the "Successions/Authorities" button on the Main Menu.

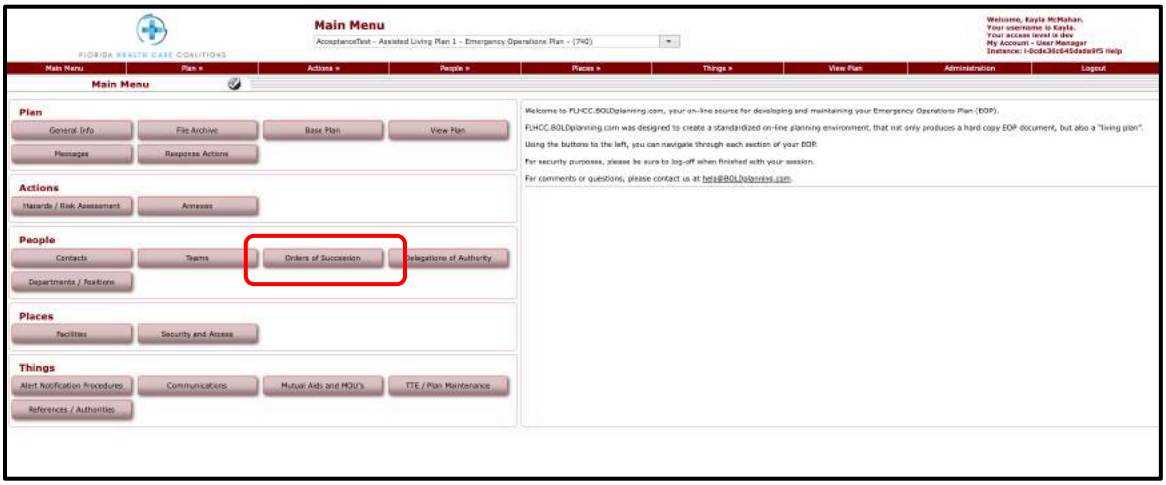



*Figure: Clicking the Succession/Authorities Button the Main Menu*

2. Click the "Sort Succession" button on the right side.

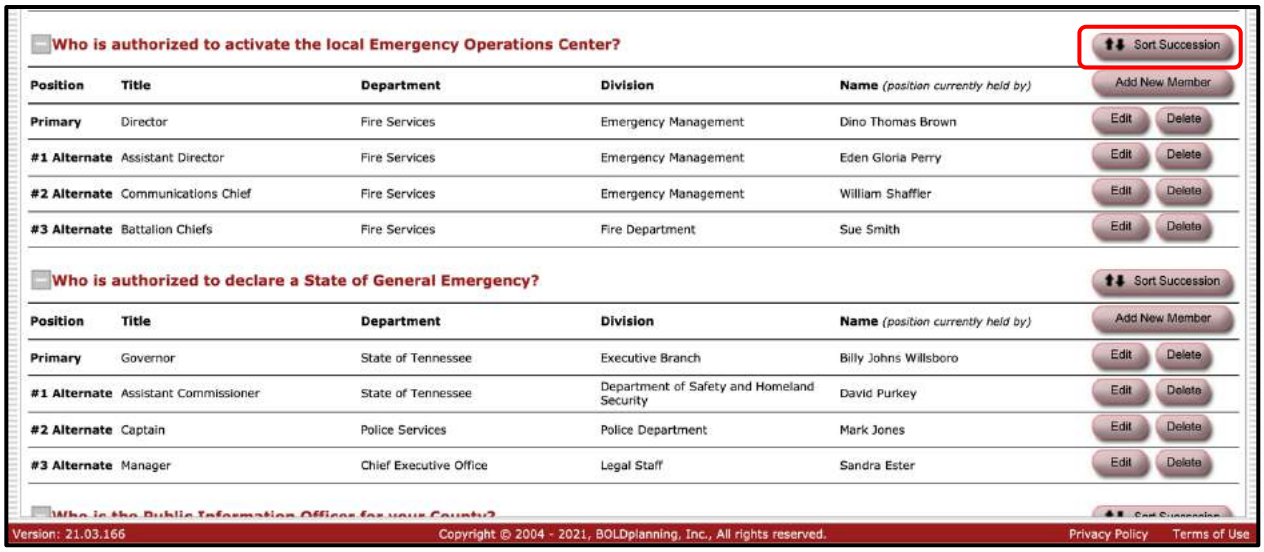



*Figure: Clicking the Sort Succession Button*

3. Place the cursor over the name of the person who will fulfill a different alternate position.

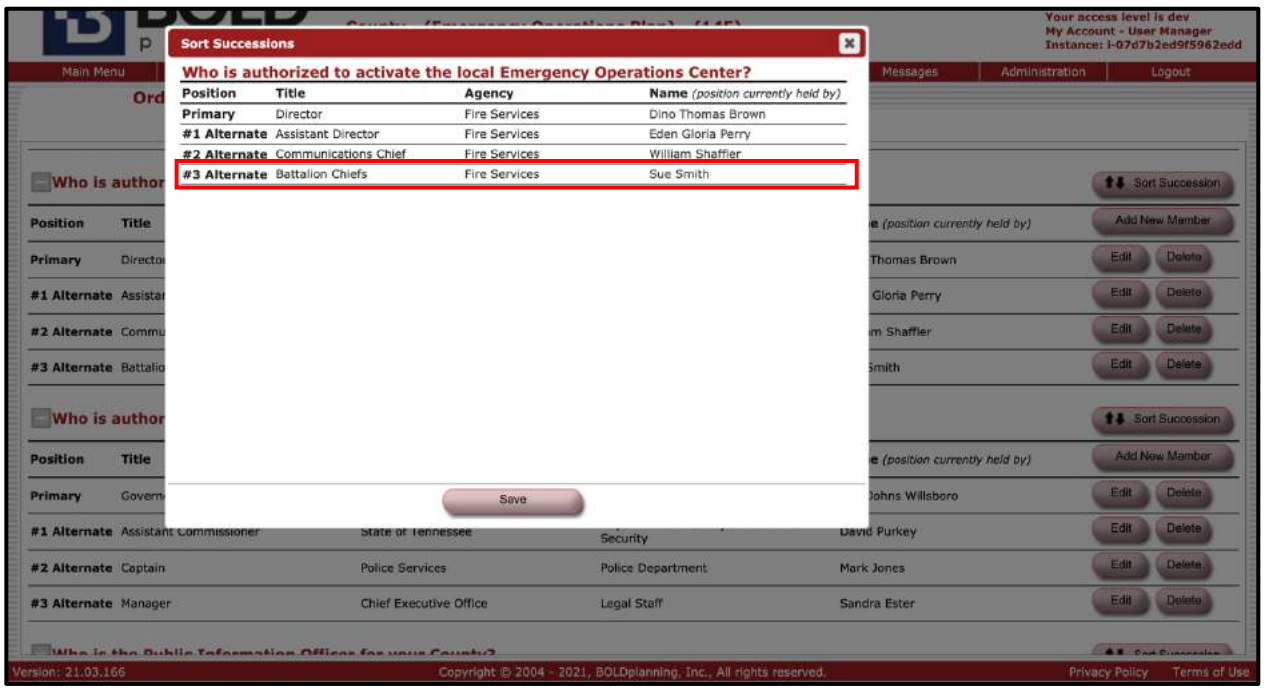



*Figure: Placing Cursor Over an Alternate*

4. When you see the crossed arrows, hold down the left cursor and drag the name to this new position. (Note that the position title moves with the name. You can ignore this.) Click "Save" when finished dragging.

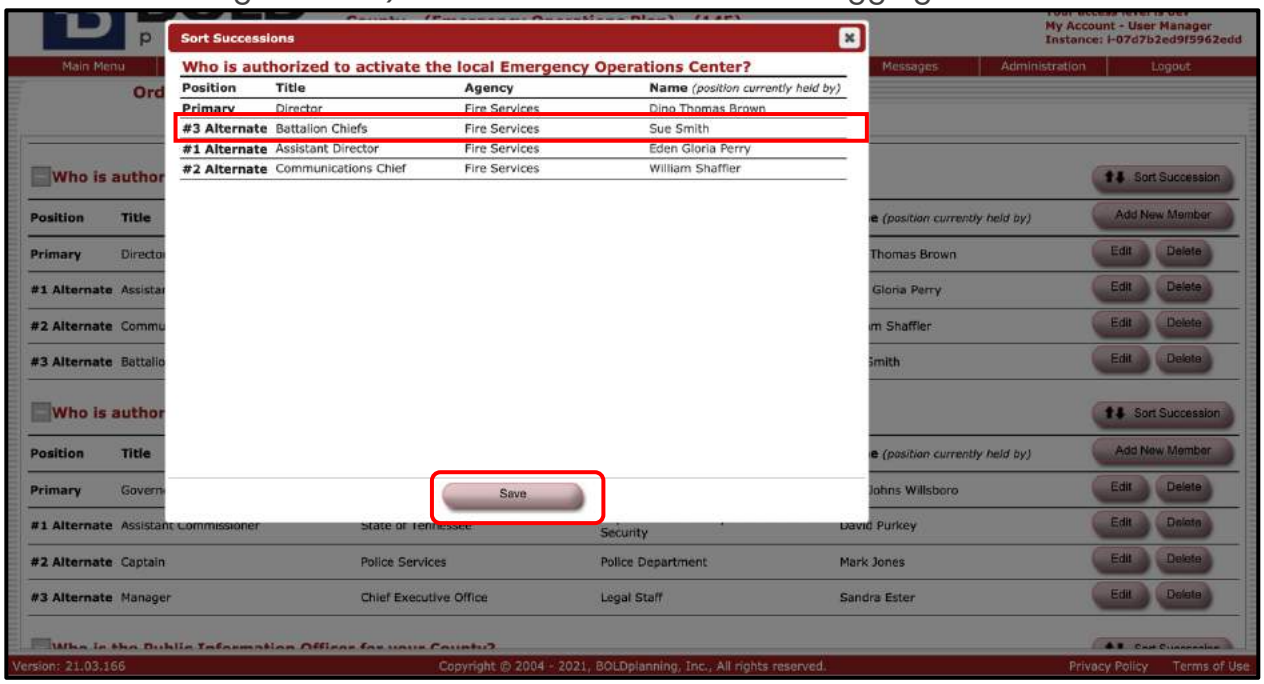



*Figure: Dragging Alternate to Desired Position and Clicking Save*

# Delegations of Authority

## Overview

The purpose of delegations of authority is to assure that certain critical functions or decisions can be handled, even if the person who usually handles those functions is unavailable during a critical period. An example would be an emergency purchase of personal computers when the person who would usually authorize such a purchase is away on a vacation and not available, or when the person is incapacitated in some way.

The **Planning** system has pre-identified four such delegations. These are:

- Travel authorization.
- Leave authorization.
- Purchase requisitions/spending authority.
- Execution of contractual agreements

These functions are critical to most organizations. You should decide if they are relevant to your organization, and whether you need to add some other types of delegations. Note also that the delegation refers to a specific *process*, not to a

person.

The process for completing this section is very similar to that of orders of succession. In each case you need to identify at least one alternate contact for each delegation relevant to your organization, although two or three alternates would be preferable. As with the other sections of the plan, any person you wish to use as a primary or alternate must already be included in the contacts database.

## Adding, Editing, and Deleting a Delegation

1. Click on the "Delegations of Authority" button on the Main Menu.

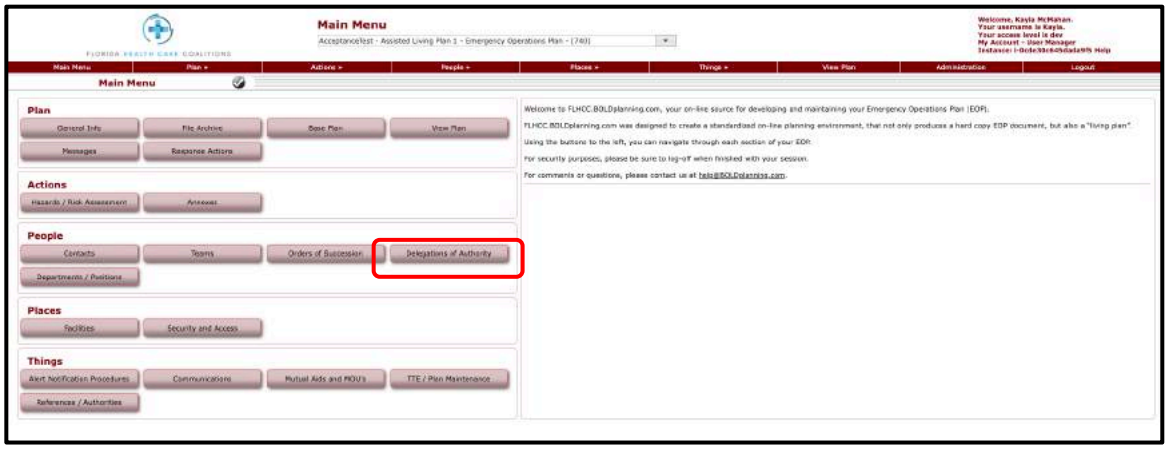



*Figure: Main Menu – Delegations of Authority*

2. Click on the "Add New Delegation" button at the top of the screen.

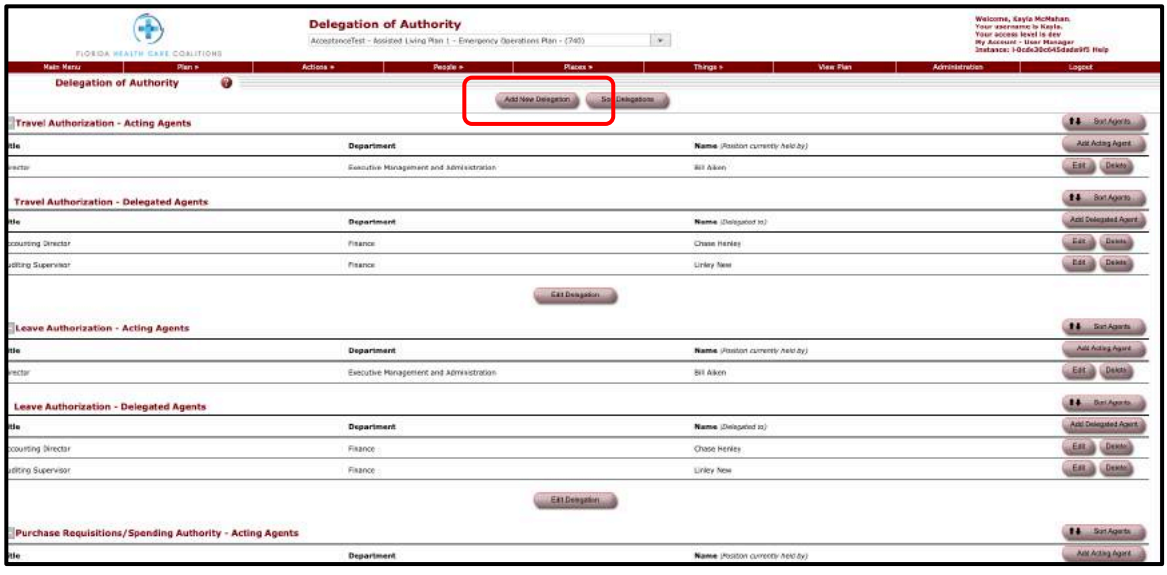



*Figure: Add New Delegation*

3. You will be presented with a box in which you can type the name of this new delegation.
4. Make sure to include a triggering condition; is the acting agent incapacitated or unavailable? Also, include any limitations that may be experienced when this authority is passed on to the delegated agent.

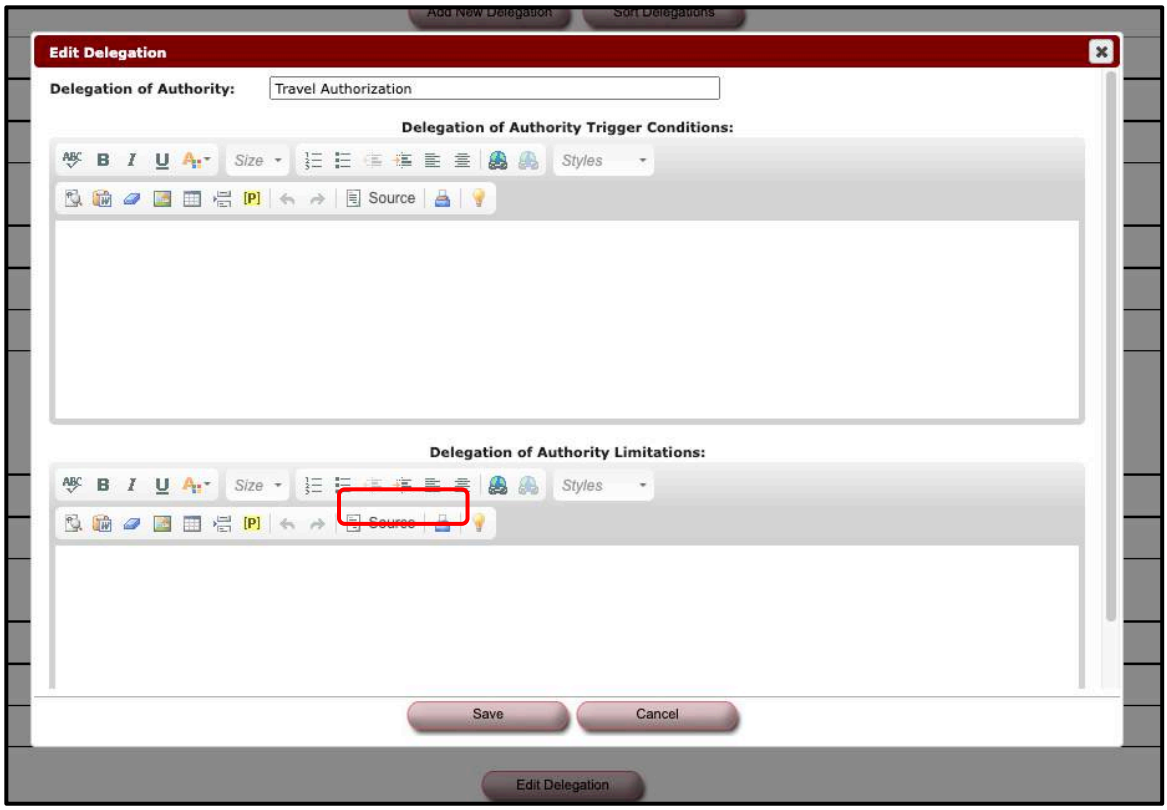



*Figure: Adding New Delegation*

5. Click "Save."
6. Check to see that the new delegation is listed and described as you wish it. It will be added to the bottom of the existing delegations.
7. You can change the name of any of the delegations listed by clicking on the "Edit Delegation" button at the bottom of each delegation.

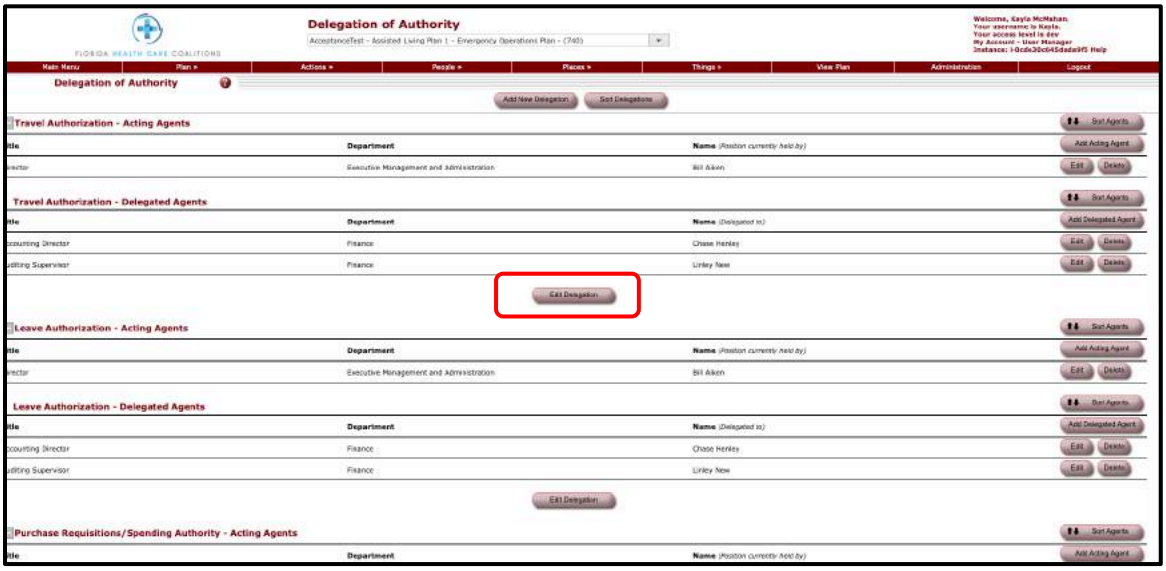



*Figure: Editing Delegations*

8. You can delete any acting agent or delegated agent in the list by clicking on the "Delete" button on the right side (beside the **"**Edit" button)

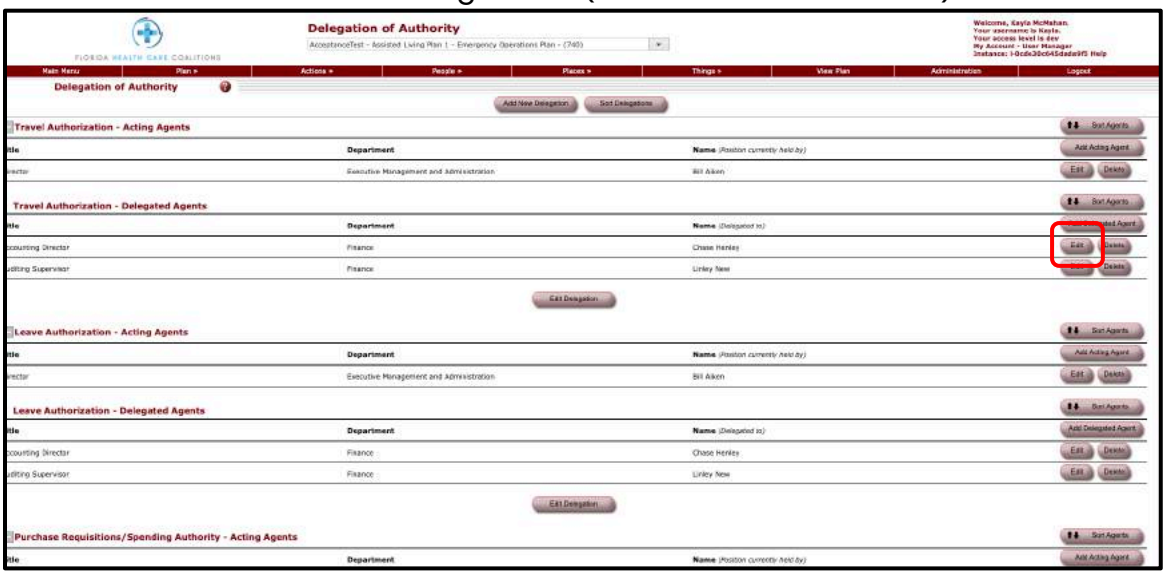



*Figure: Delete Delegation*

# Editing Delegations of Authority

1. Click on the "Delegations of Authority" button on the Main Menu.

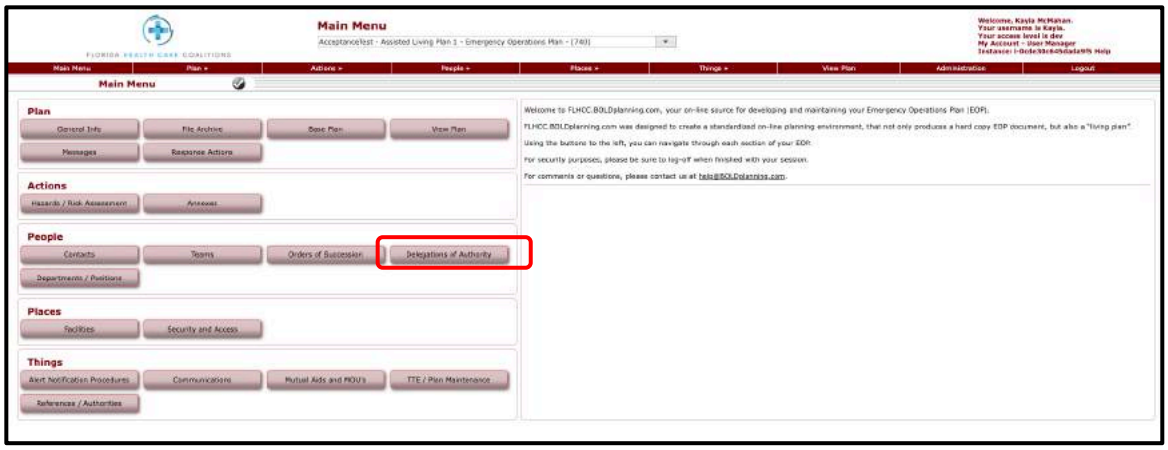



*Figure: Main Menu – Delegations of Authority*

2. You will see the list of predefined delegations listed above.

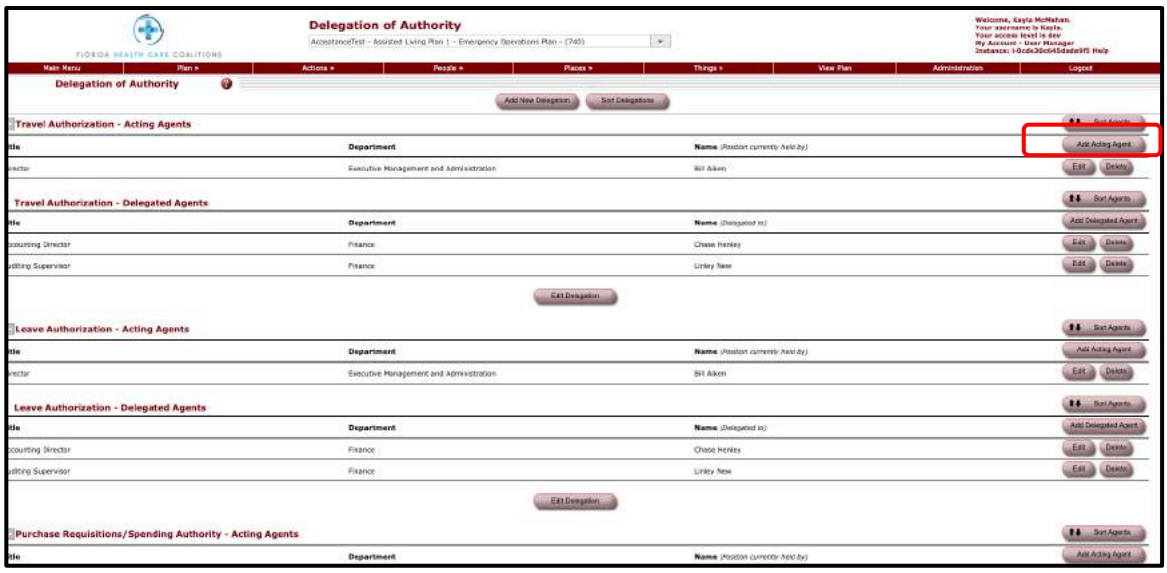



*Figure: Add Acting Agent*

3. *For each delegation in turn*, click on the **"**Add Acting Agent" button to the right of the delegation row. Select the appropriate primary name from the contact search results. This is the person who *usually* handles this specific function.

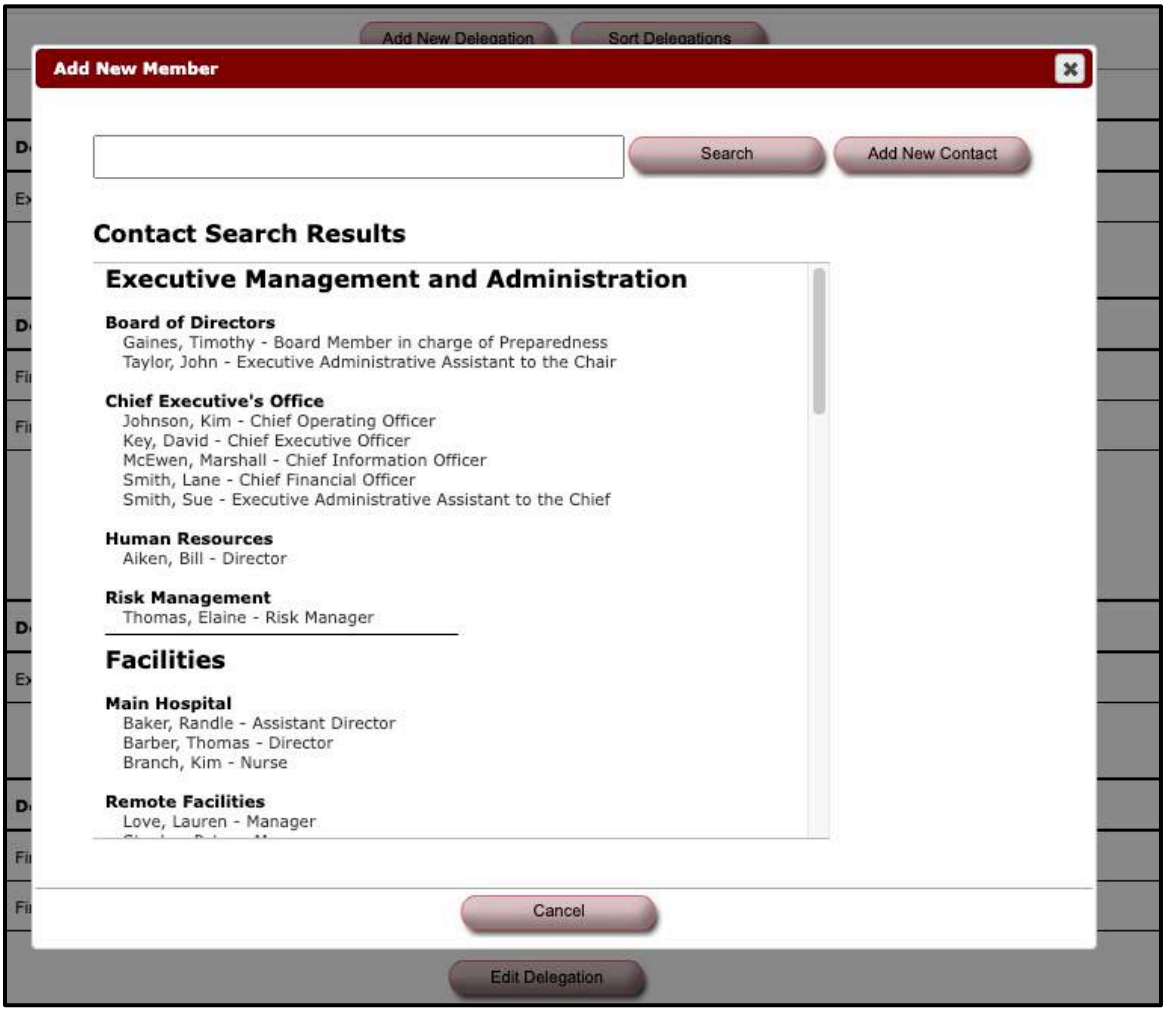



*Figure: Add Acting Agent from Contacts*

4. After clicking on that person's name, you will be returned to the Delegations of Authority screen, and you will see that person listed as the "Acting Agent/Position Currently Held By."

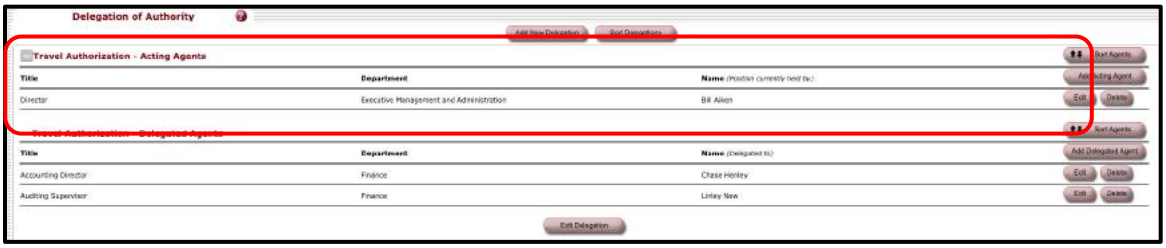



*Figure: Adding Acting Agent*

5. Click on the "Add Delegated Agent" button to the right of the delegation row. Select the appropriate Delegated Agent name from the contact search results. This is the person who will handle this specific function if the primary is unavailable.

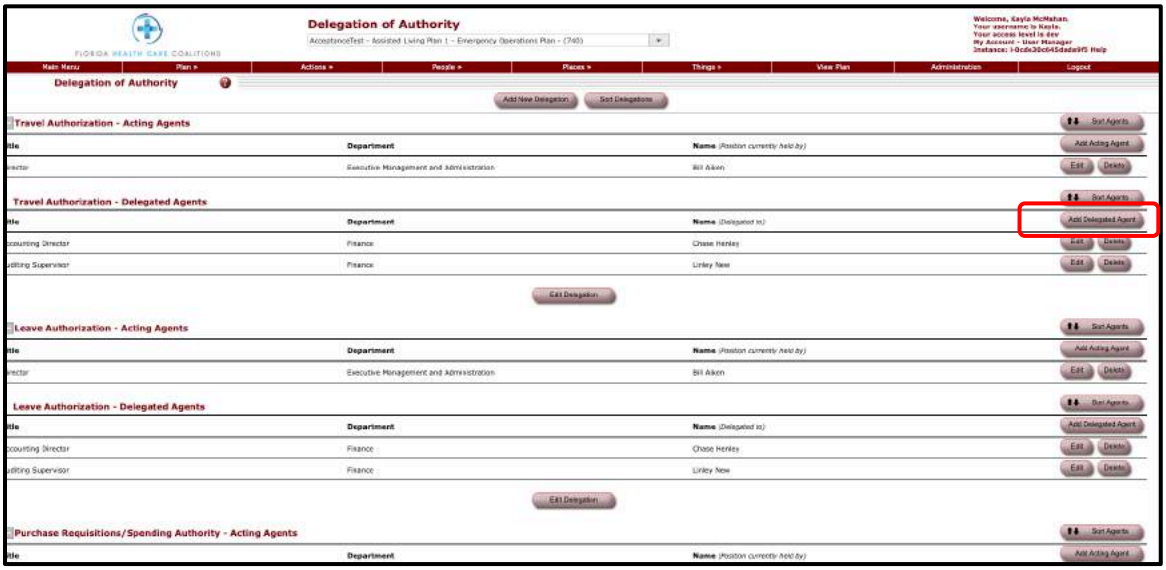



*Figure: Add Delegated Agent*

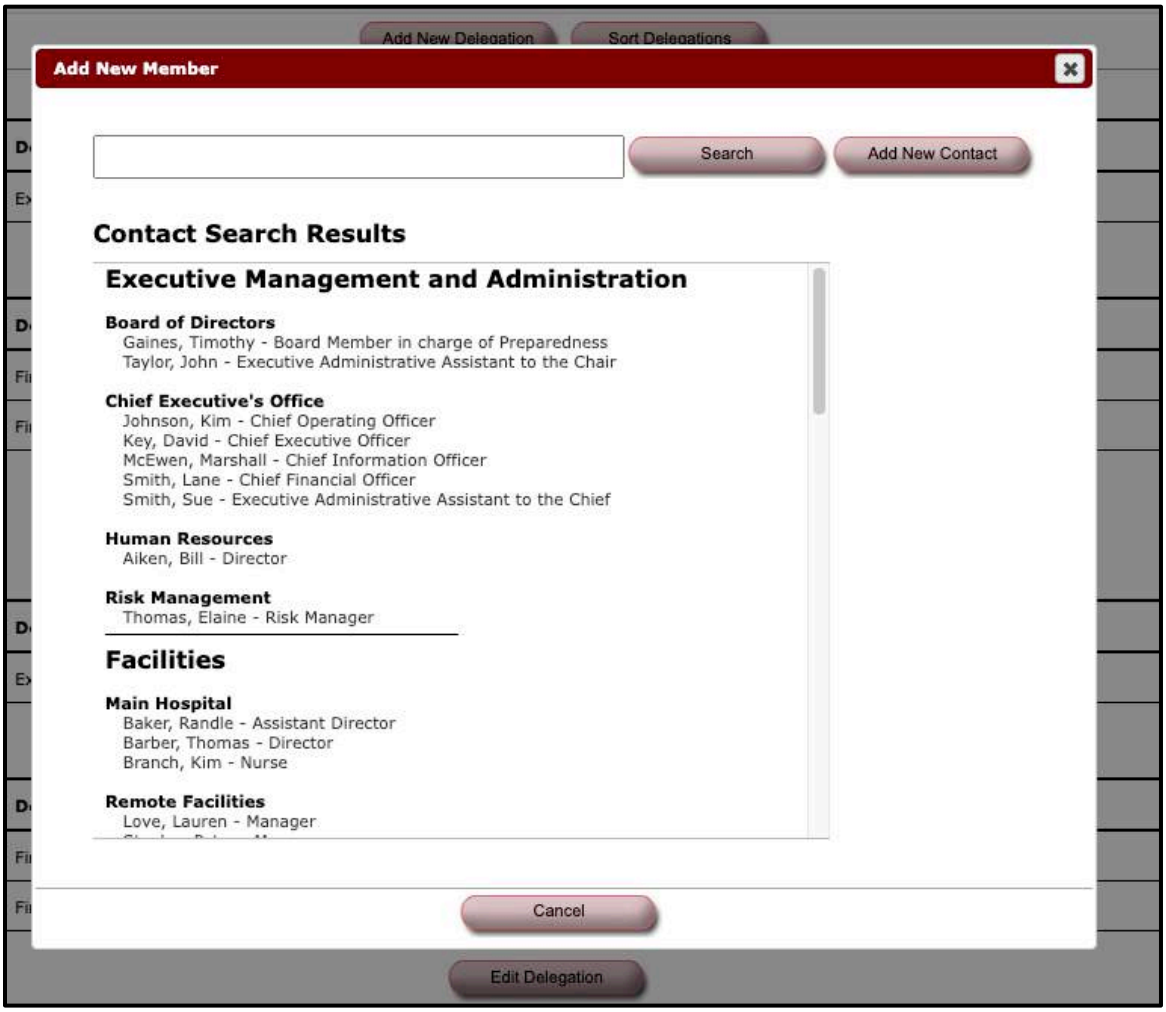



*Figure: Add Delegated Agent*

6. After clicking on that person's name, you will be returned to the Delegations of Authority screen, and you will see that person listed as the "#1 Delegated Agent."
7. Once again, click on the "Add Delegated Agent" button to the right of the delegation row. Select the appropriate *second* Delegated Agent name from the contact search results. This is the person who will handle this specific function if the #1 Delegated Agent is unavailable.

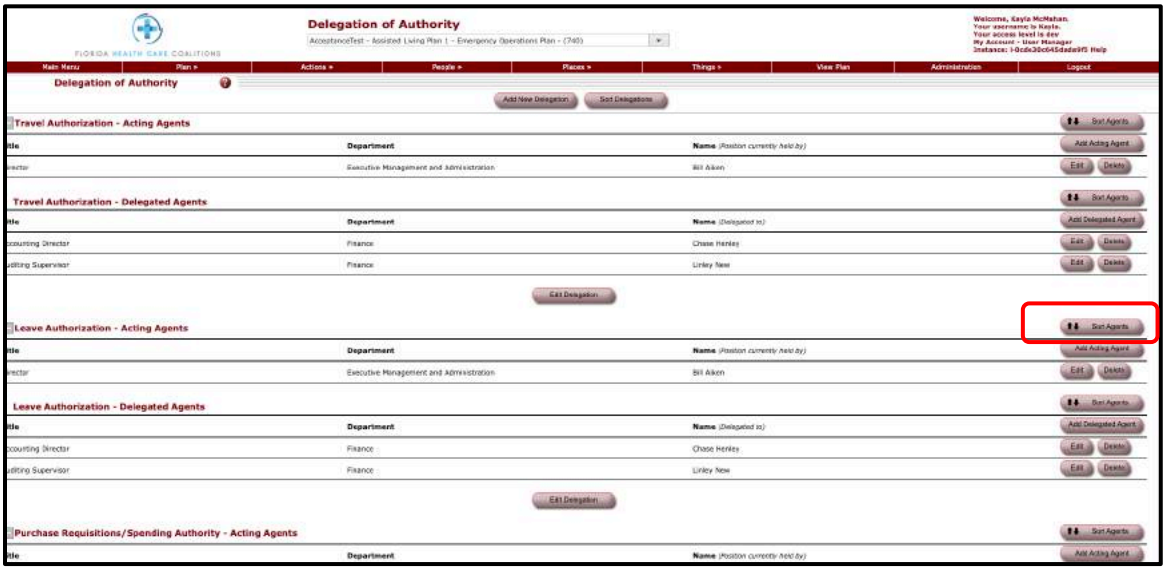



*Figure: Sort Agents*

# General Information

## Overview

In General Information you should draft your supersession statements (what plans, if any, this one replaces) and acknowledgements for individuals who have been integral to the implementation or done extensive proofing and coordination work.

Later, you will return to these drop-down menus and choose individuals and entities from information you enter in your Contacts Database, Departments, and Facilities portions of the tool. These will be people who are the main point of contact (usually the EOP project manager) as well as specific departments which function as your EOC or EMA's office.

1. Click on the “General Information” button on the Main Menu.

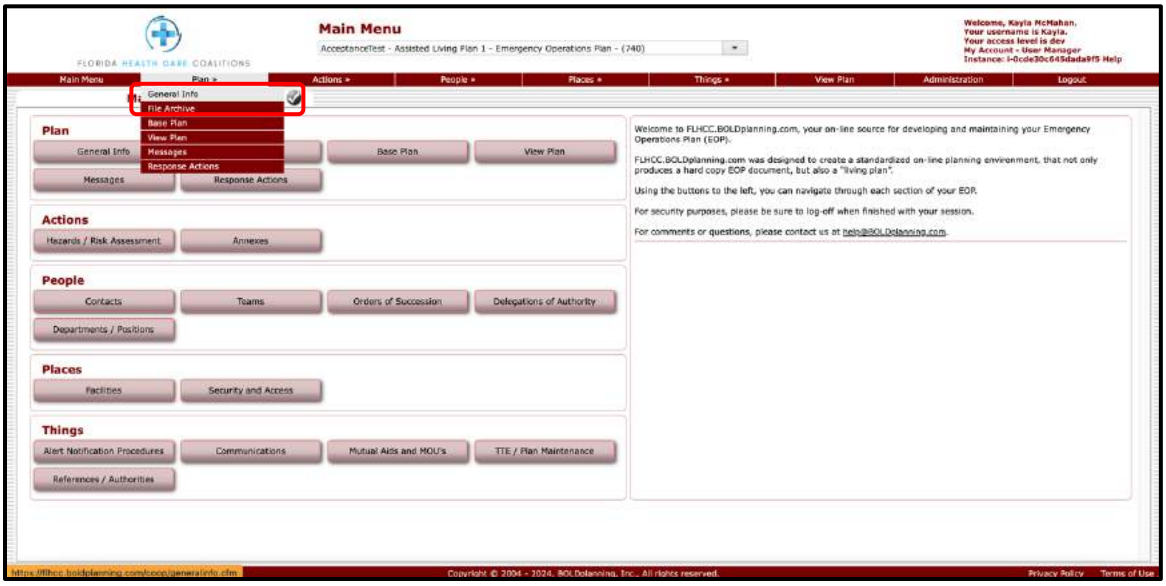



*Figure: Clicking the General Information Button on the Main Menu*

2. Make sure to name your plan to what suites your organization.
    a. Make sure this goes under “Name of Jurisdiction/Organization.”
    b. Make sure the “Name of Plan” is “Emergency Operations Plan” and the “Abbreviated Name of Plan” is “EOP.”

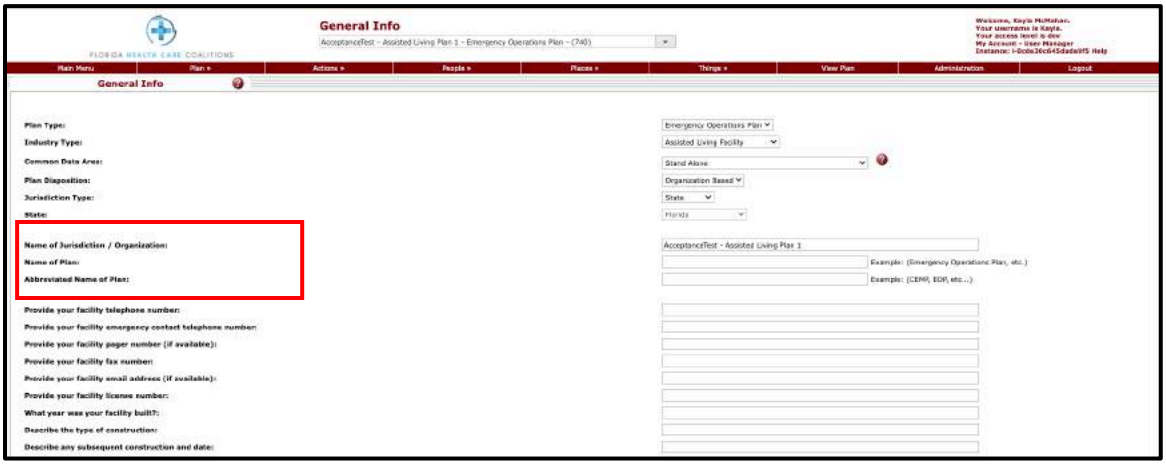



*Figure: Filling out Name of Jurisdiction and Name of Plan*

3. Fill out the Supersession statement and Acknowledgement section.

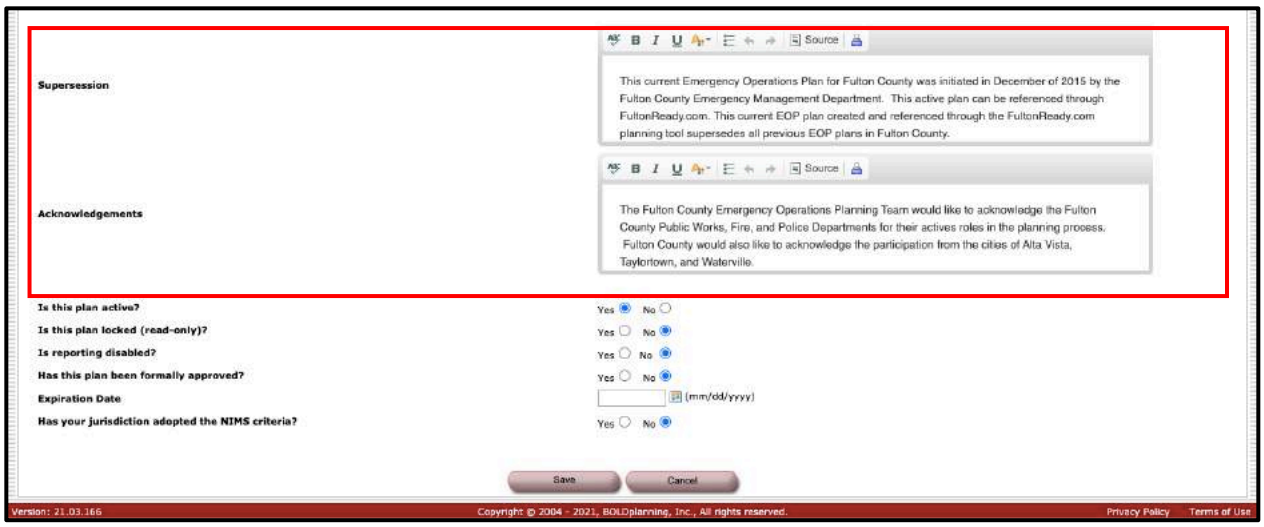



*Figure: Filling out the Supersession Statement and Acknowledgement Section*

4. Lastly, using information from the Contacts Database, Departments, and Facilities, fill out the drop-down menus to enter the main point of contact and specific departments which function as your EOC or EMA's Office.

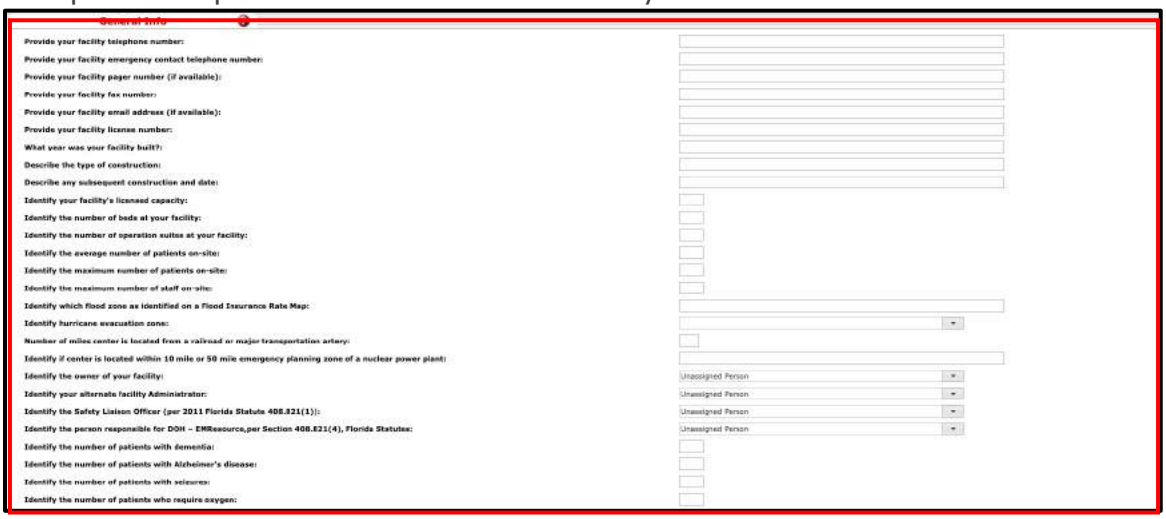



*Figure: Filling out Main Point of Contact and Department Information*

# Departments/Positions

## Overview

This tells your plan users how your organization is put together with the names of every department associated with day to day, and emergency operations. These are also the key players for your annex actions and their drafting process.

- You will want to include entities like EMS services, administration, critical vendors/long-term contractors, and other stakeholders who help you complete daily actions and respond to extraordinary events.
- Try not to use abbreviations and acronyms, or if you do, make sure to spell out the entire name in beside it. Be consistent in your naming criteria: start at the highest level possible (often federal) and work down.
- Try not to leave anyone out of this list and after you have typed out a department or a position, select whether it is federal, state, local, municipality, private sector, non-profit, or other. This organizes these departments in list form under the entities they are responsible to and is important when you choose a department or agency that is responsible for specific annex actions later.

## Adding a Department/Position

1. Click on the "Department/Position" on the Main Menu.

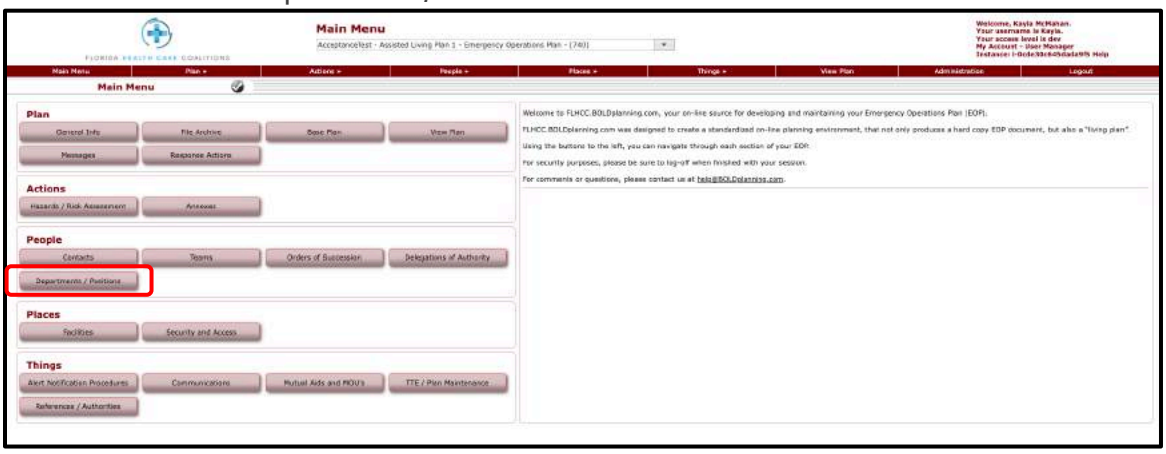



*Figure: Department/Position Button on Main Menu*

2. Click the "Departments/Positions" button to add a department or position if you do not see it in the list provided.

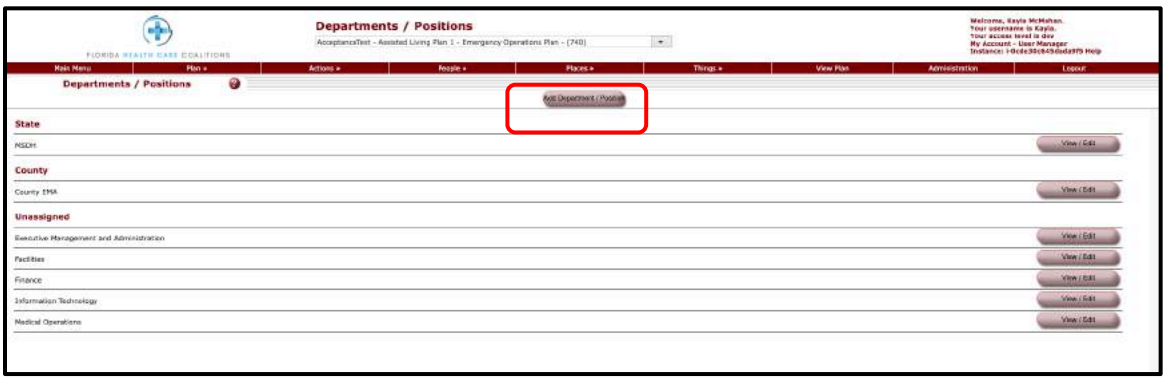



*Figure: Add Department/Position Button*

3. Type in the Department/Position name and select a type (federal, state, county, city, municipality, private sector, non-profit, college or university, hospital, or other).

*Figure: Adding Department/Position Name and Type*

4. Click "Save."

## Deleting a Department/Position

1. Click on "Department/Position" button the Main Menu.

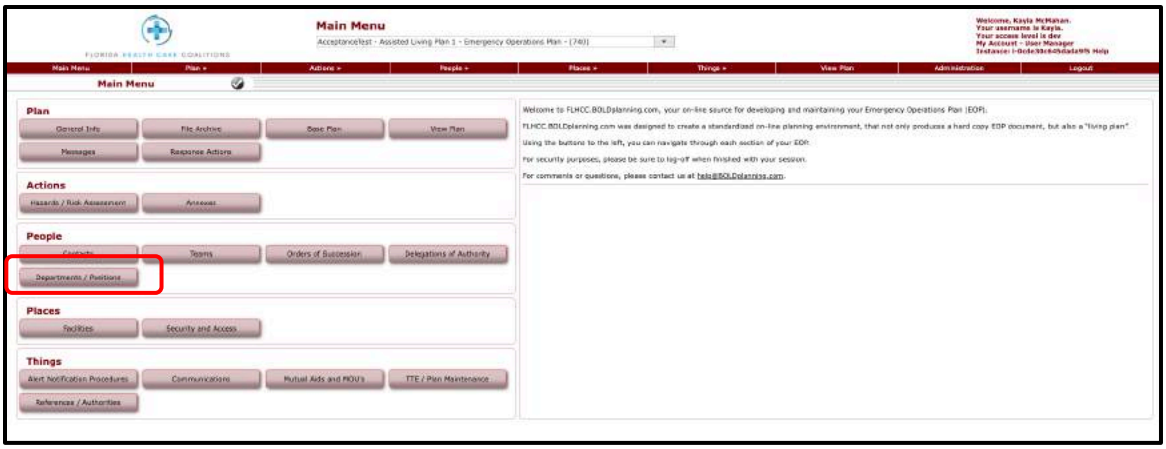


*Figure: Department/Position Button on the Main Menu*

2. Click on the department/position you wish to delete.

3. Click the "Delete" button on the bottom right.

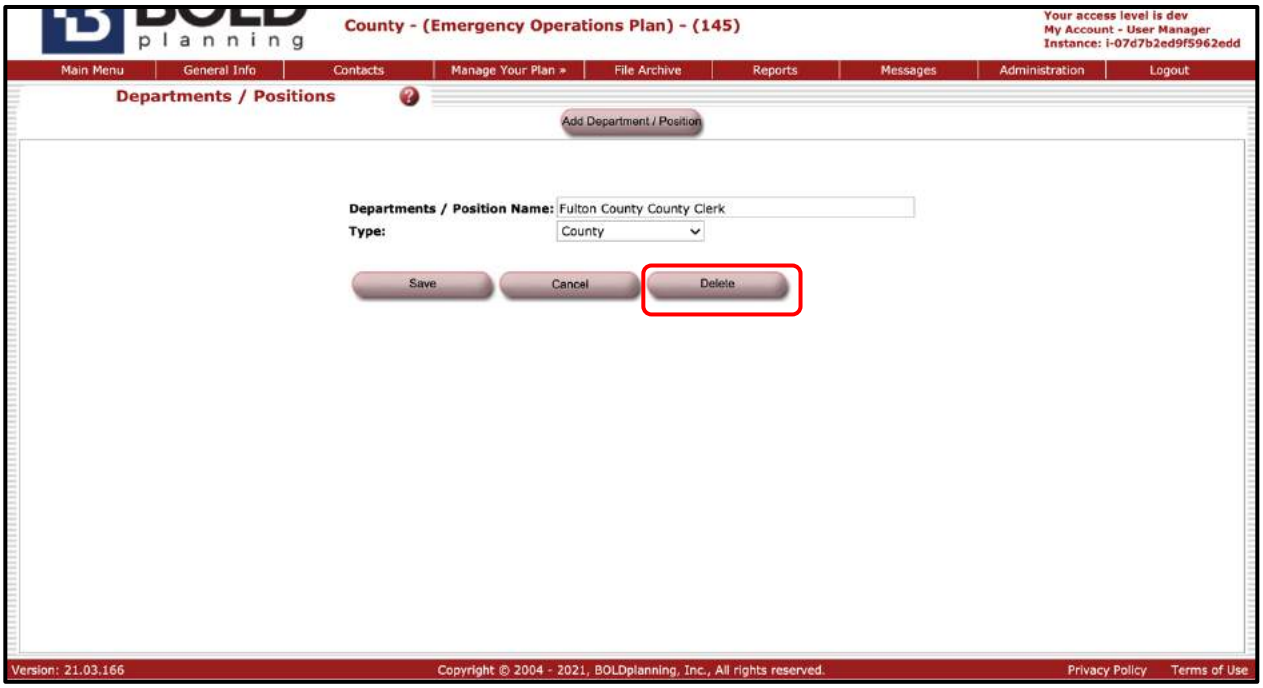



*Figure: Clicking the Delete Button on a Department/Position*

# Hazards/Risk Assessment

## Overview

In order to develop actionable response guides and annex lists, you need to have defined your major hazards and threats. These actions will be listed in conjunction with annex/incident response actions but placed in a separate list for that specific hazard alone, not for the annex or a department.

They will ultimately be attached to specific annex/incident actions as well in the annex action portion of the plan.

- After defining hazards and their potential impacts in the two dialogue boxes given, planners should then rank their probability, severity, duration, and warning time.
- These rankings will order them in a list to prioritize them for planners and reviewers.
- Once they are in an order that fits your organization's imperatives, you can create specific actions that are taken to respond to these hazards.

## Editing Hazards/Risk Assessment Using Import

1. Click on the "Hazards/Risk Assessment" button on the Main Menu.
2. Click on the "Import Hazards/Risks" button.

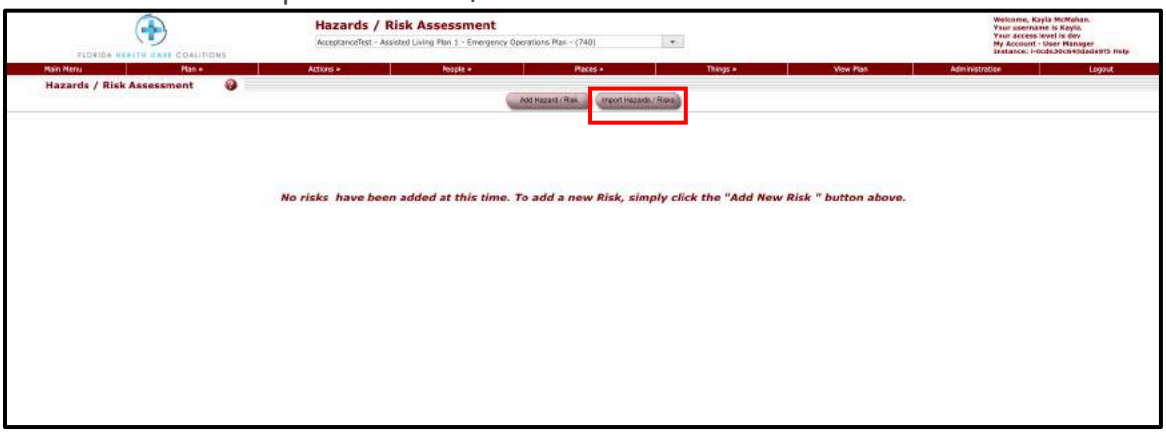



*Figure: Clicking the Import Hazards/Risks Button*

3. Click on the box to the right of each hazard/risk you wish to import.
4. Click on the "Import Selected Risks" button.

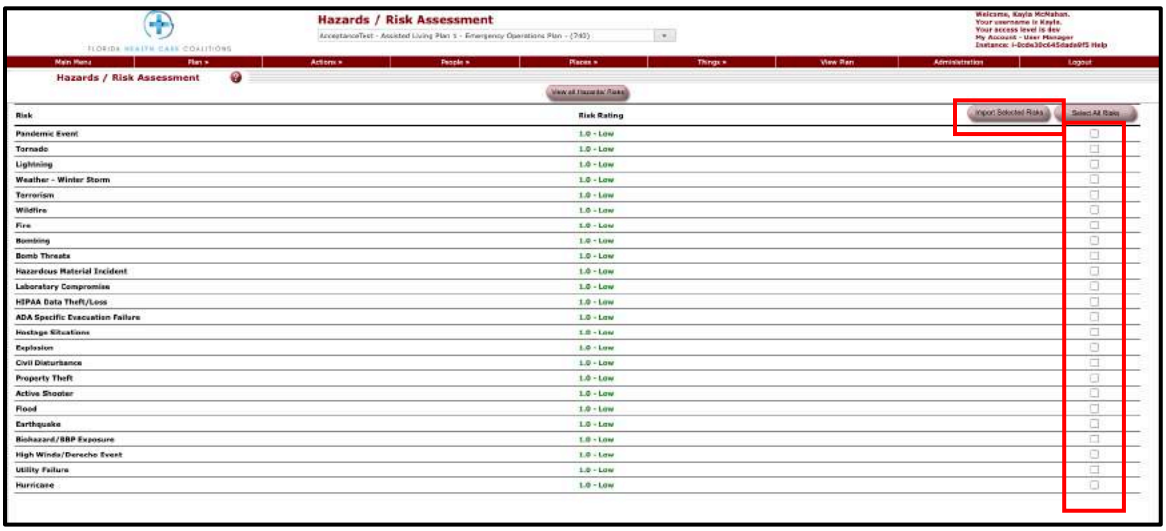



*Figure: Selecting Appropriate Hazards and Clicking Import Selected Risks Button*

5. Click on the "View/Edit" button.

*Figure: Clicking the View/Edit Button of a Selected Hazard/Risk*

6. Review the data provided for the imported hazard/risk.
7. Make any necessary edits to the information in the drop-down boxes or the free-form fill-in boxes.

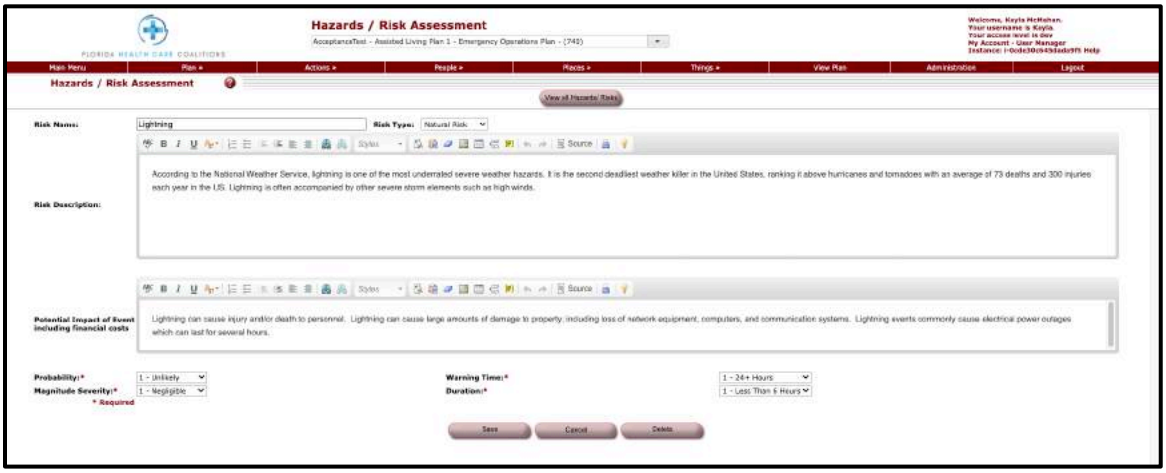



*Figure: Editing Information of a Selected Hazard/Risk*

8. Click "Save."

9.

# Editing Hazards/Risk Assessment Without Using Import

1. Click on the "Hazards/Risk Assessment" button on the Main Menu.
2. Click on the "Add Hazard/Risk" button.

*Figure: Add Hazard/Risk*

3. Complete the information required in the drop-down and free-form fill-in boxes.

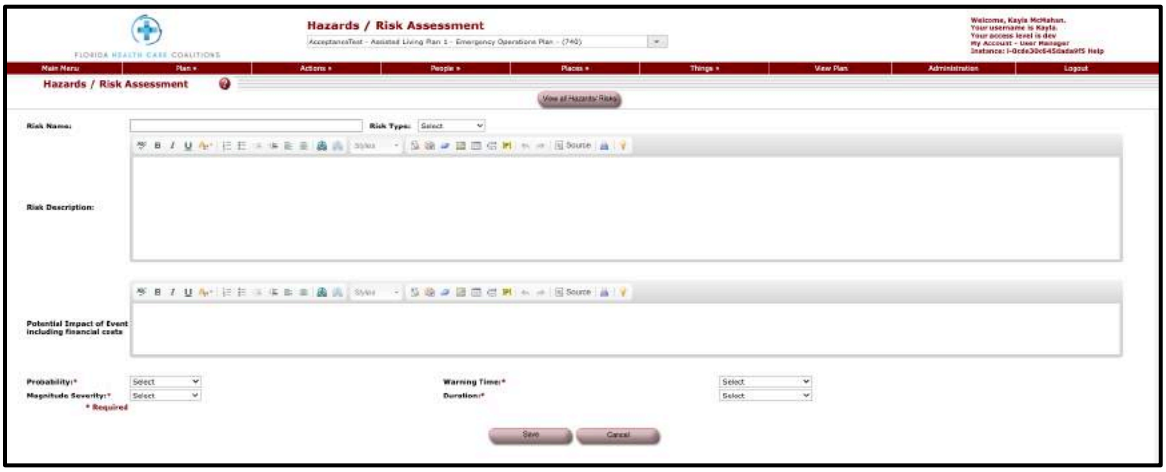



*Figure: Adding a Hazard/Risk Information*

4. Click "Save."
5. Click on the "Action List" button to the right of the hazard/risk.
6. Click on the "Add New Action" button.

*Figure: Clicking on Action List Button*

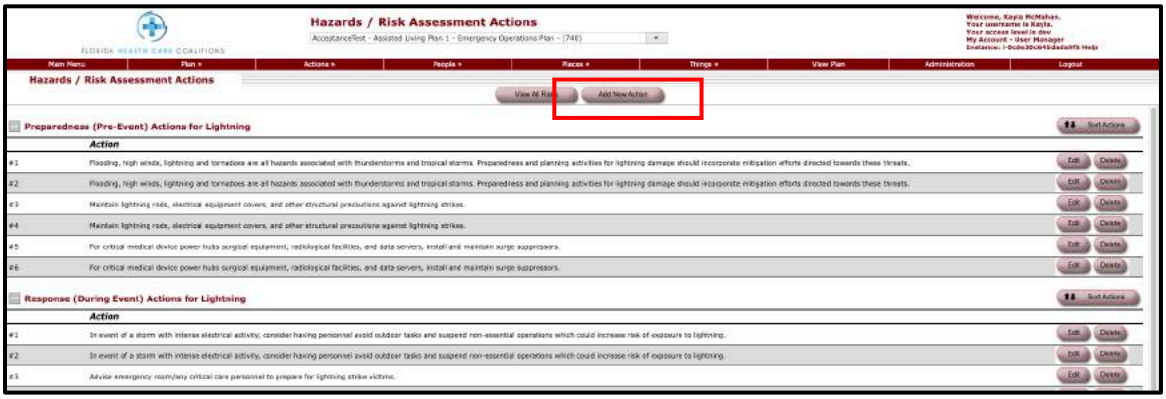



*Figure: Add New Action Button*

7. Decide what this action's role & phase is for and click on the box to the selected phase.
    - Preparedness (pre-event)
    - Response (during event)
    - Recovery (post-event)
    - Mitigation

8. Write a description of the action into the free-form fill-in box.

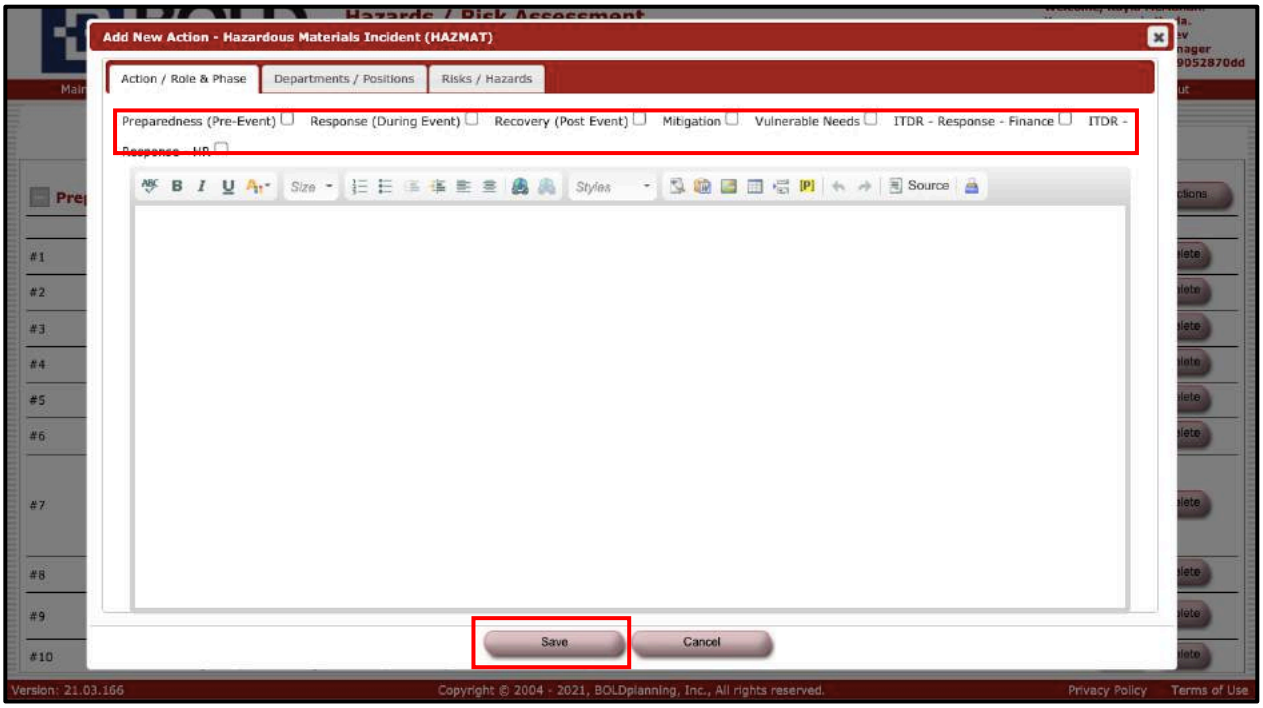



*Figure: Adding Role/Phase and Description of Action*

9. Click "Save."

10. Check to make sure this information entered is correct.

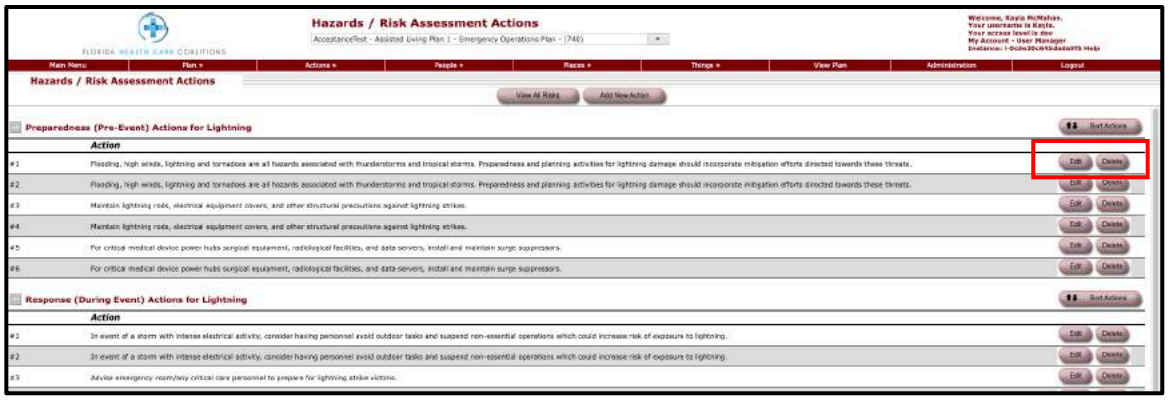



*Figure: Edit/Delete an Action*

11. Use the "Edit" or "Delete" button to the right of the action to make changes or deletions.
12. Repeat steps 7 through 12 for all actions considered for this hazard/risk.
13. Click on the "View all Risks" button.
14. Check to be sure that all hazards/risks are listed as you wish them to be.

## Reordering the List of Hazards/Risk Assessment

1. Place your cursor over the item in the list of hazards/risks that you wish to move to another position. (The list must contain at least two items.)
2. When you see the crossed arrows, hold down the left cursor and drag the item to the new position.
3. Release the cursor when the item is in the new correct position in the list.

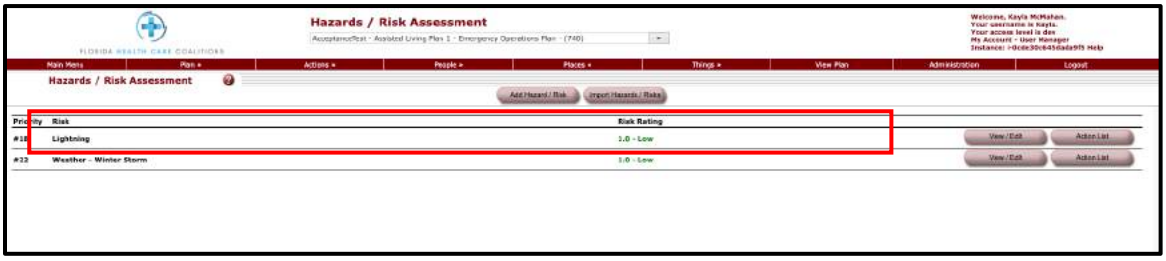



*Figure: Selecting Hazard/Risk to Reorder*

*Figure: Dragging Hazard/Risk to Reorder*

4. Check to see if the hazards/risks are now displayed correctly.

# Annexes

## Overview

Annexes are the backbone of any response plan, as they outline your key responsibilities, your actionable strategy, and the individuals/departments responsible for carrying these actions out.

Annexes do not have to be structured according to a particular format, and some organizations may or may not need all fifteen that are typically included in jurisdictional plans as outlined in the Comprehensive Preparedness Guide. Some strategies that are suggested in CPG 101 that may better fit your needs include:

- Functional (also called incident plan) annexes: Organized around hazards and responses specific to them.
- Departmental annexes: Organized around departments' specific responsibilities.
- Emergency support function annexes: Larger-scale categories that encompass multiple departments and their responses to threats, hazards and needs that share common elements.

Each annex includes a check list of actions that must be carried out during activation. The action lists are dependent on a strong conceptual framework that lays out the rules and limits to a specific type of response or emergency. This framework organized around distinct chapters in the annex details and allows you to bring over your organizations pre-existing material or formatting into each annex.

## Annex Details

When you entered your departments and positions as outlined, these became the agencies and entities which now appear at the beginning of your annex details. You can select three operational categories for these agencies, and you may need to select multiple layers (federal, state, local, or private sector) for each of these three categories depending on the complexity of the response:

- Coordinating: The coordinating agency is the entity with management oversight for that annex. Coordinating is carried out through a "unified command" approach as agreed upon collectively by the designated primary agencies and, as appropriate, support agencies.
- Primary: A primary agency is one with significant authorities, roles, resources, or capabilities for a particular function within an annex.

- Support: support agencies are those entities with specific capabilities or resources that support the primary agency in executing the mission of the annex.

After you have chosen to work on your annex details, the annex editor lays out the following chapters when you select "Customize Annex":

- Introduction and scope: What this given annex covers and what its organizational limits are.
- Concept of operations: How the annex will function at a strategic level and what its operational boundaries are.
- Roles and responsibilities: Those individuals and agencies in your organization who respond to this threat or hazard.
- Management: Financial expenditures, coordination of resources and responsibilities for documentation related to expenses.
- References and authorities: These are federal, state, and local guidelines or statues that directly pertain to the execution of this annex. They are generally pre-populated for annex coordinators and come pre-loaded in the system under References and Authorities. They should be regularly reviewed for the most current guidance or regulatory changes.

## Annex Actions

After you have decided on your annex format and the annex details have been developed, you can get to work on the annex actions. These will be broken down into five phases of emergency management:

- Preparedness
- Protection
- Response
- Recovery
- Mitigation

Each of these categories will have a check list of actions which fall under it, and these will appear in your annex chapter under Responsibilities.

Annex coordinators and administrators should work closely with their team members through this portion of the planning process to make sure they bring as much subject matter expertise and experience to the table as possible. These actions will directly impact the quality of your response.

- Actions are broken out into check lists both by the phases listed above and are also assigned to the department or agency responsible for them and the hazard they directly pertain to.
- You can assign the same action to multiple phases (for instance, "Calculating Expenses" may be categorized as both a preparedness action and a recovery action), and you can assign a given action to multiple annexes. Team members working on multiple Annexes should coordinate closely with one another to prevent duplication of action or layering of redundant actions across annexes.
- Selection of a hazard (or multiple hazards) that action pertains to occurs through the tabs which appear at the top when you select "Edit" or "Add" a new action.
- For an action to be effective, it needs to be assigned to a department/position through the upper tabs as well. Once this is done, and the Action saved, a gold star will appear to the left of the action in the list indicating is has been assigned.
- Actions can be reordered by choosing "Sort Actions" and then dragging and dropping them into the order you prefer.

## Editing Annexes

1. Click on the "Annexes" button on the Main Menu.

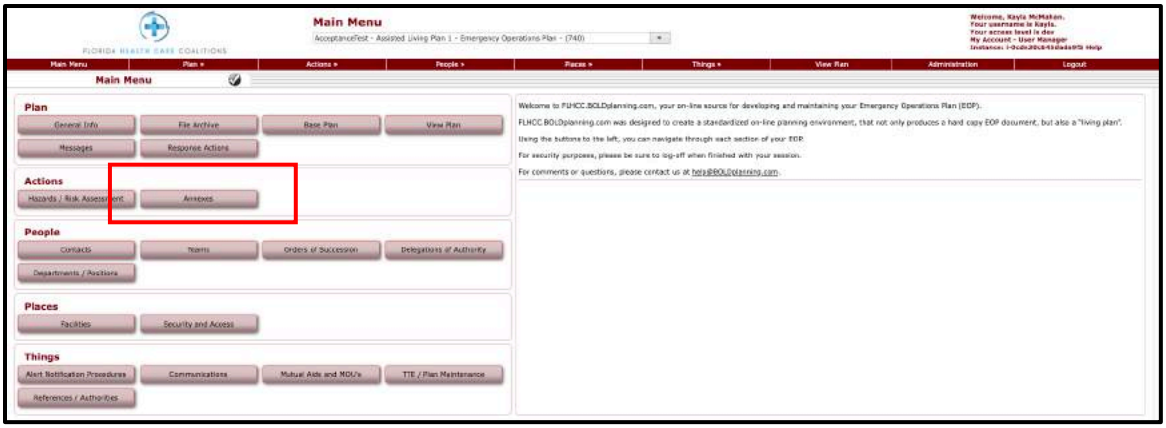



*Figure: Clicking the Annexes Button on the Main Menu*

2. To add a new annex, click the "Add New Annex" button at the top.

*Figure: Clicking the Add New Annex Button*

***This will take you through a flow to create your annex.**

3. Fill out the required information for the annex. Fill in the title of the annex and check the boxes (support, primary, or coordinating) beside each relevant department(s)/ position(s).
    a. These boxes represent what role each department(s)/position(s) have in this specific annex. Are they supporting, primary, or coordinating agency?
4. When finished adding coordinating, primary, and supporting agencies for an annex, click 'Next.'

*Figure: Selecting Department(s)/Position(s) and If They Are a Supporting, Primary, or Coordinating*

5. To edit a section of your annex, select the edit button beside the section. To add a new section, click 'Add New Section.' When finished, click 'Next.'

Figure: Editing an Annex Section

6. You can create actions for your annex. Click 'Add New Action' to add.

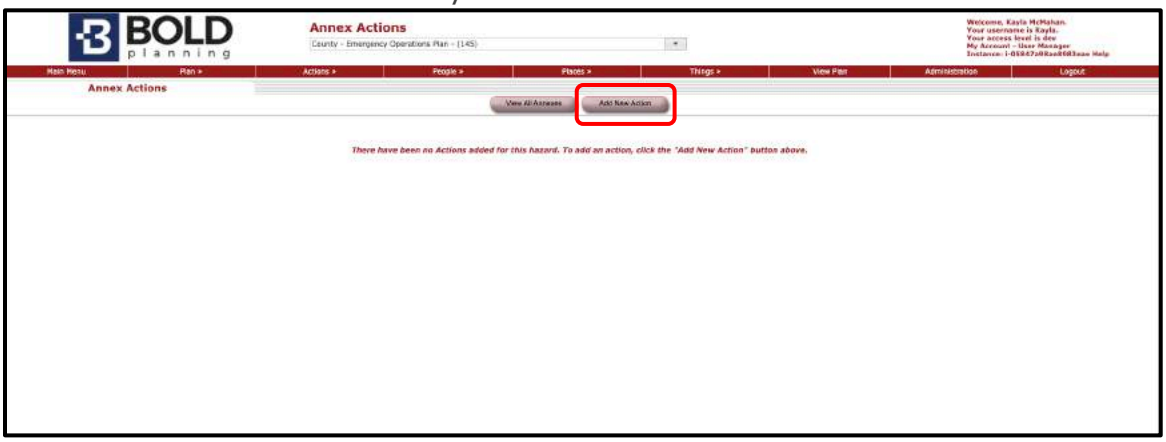



Figure: Adding a New Action

7. To edit an existing action for an annex, click the "Edit" button to the right of the specific action.

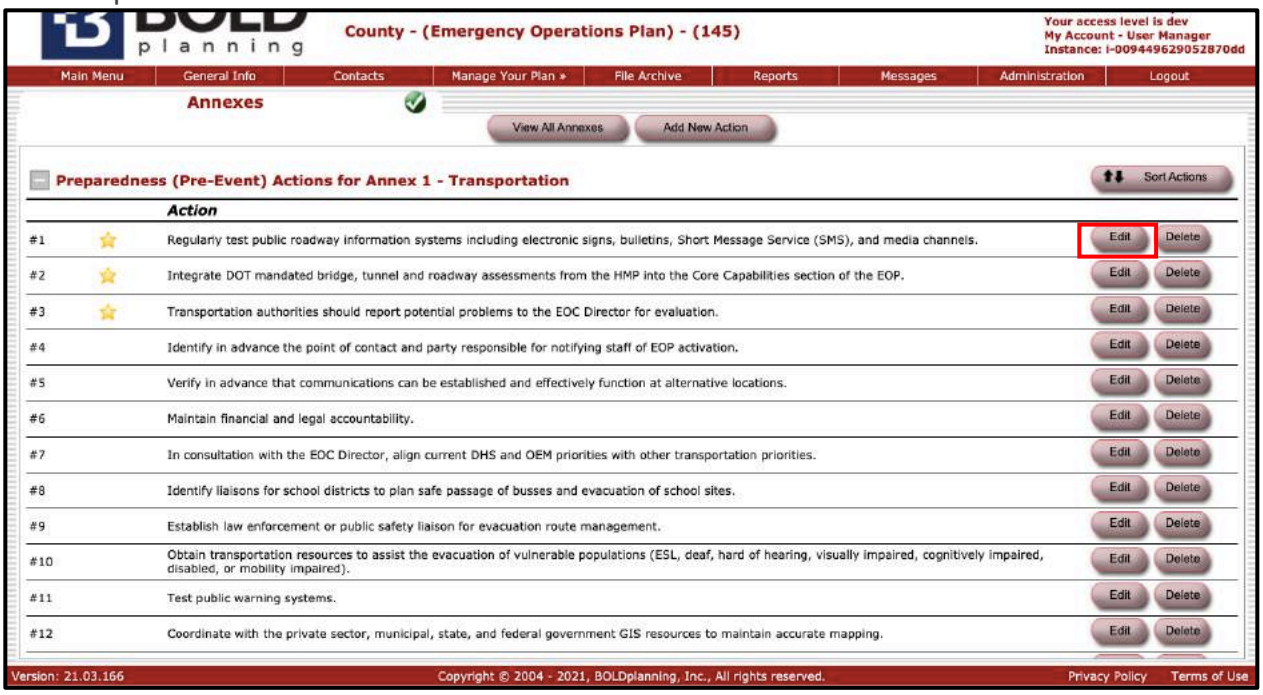



*Figure: Clicking the Edit Button to Edit Existing Annex Actions*

a. Make sure the action/role and phase are described and selected.
b. Make sure the correct annex(s) is selected.
c. Make sure the departments/position for the given action are selected.
    i. Unclick the "Unassigned" box to choose the given departments/position.
d. Link the action with the appropriate risks/hazards, as well.

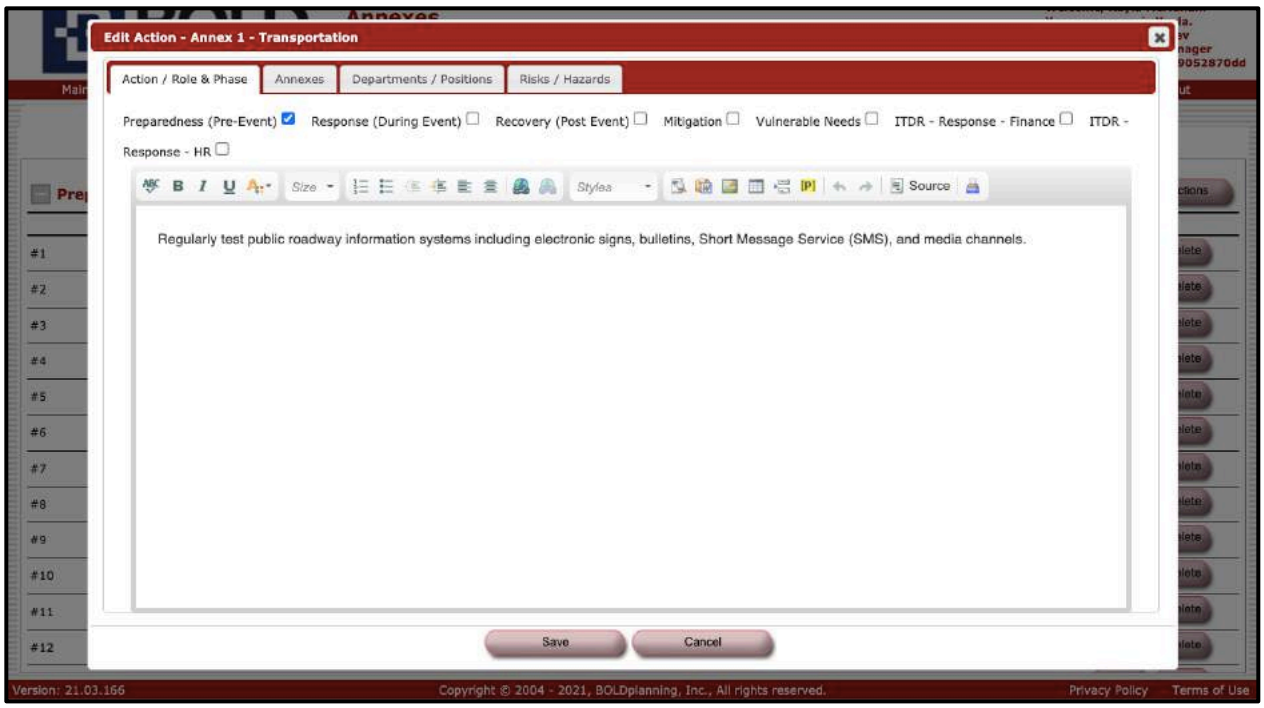



*Figure: Describing the Action/Role and the Phase*

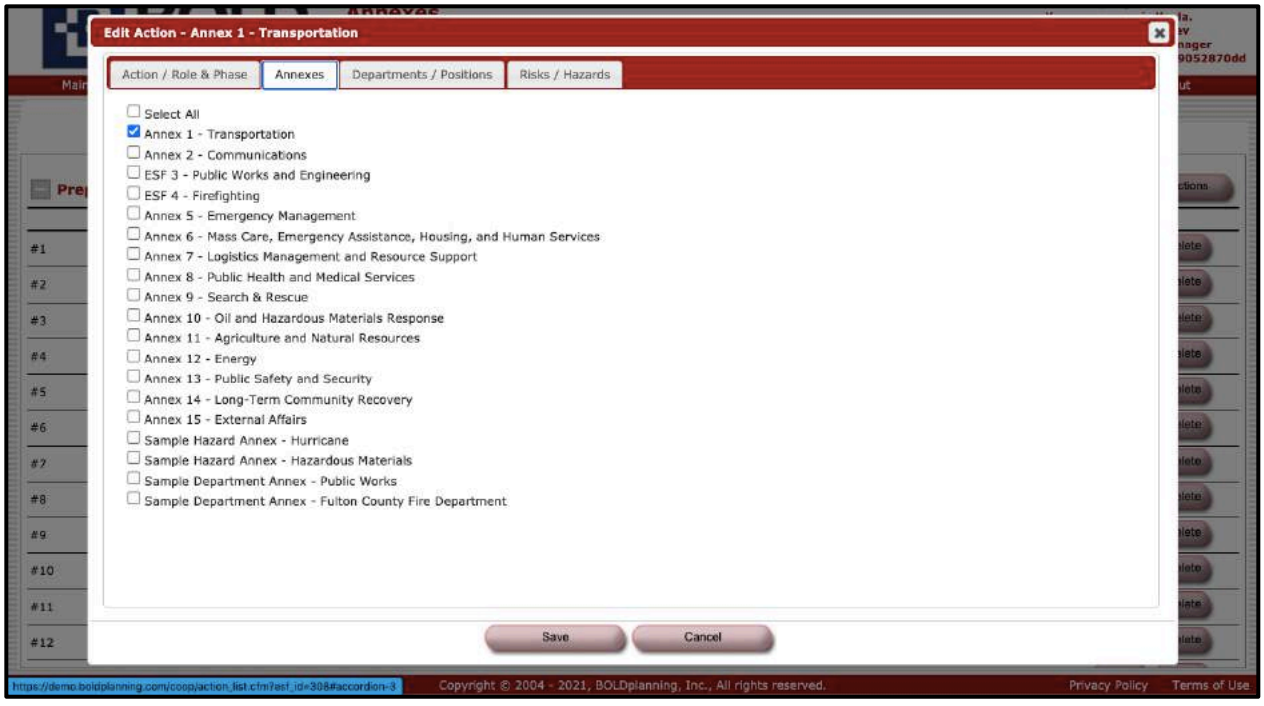



*Figure: Selecting the Correct Annex(es)*

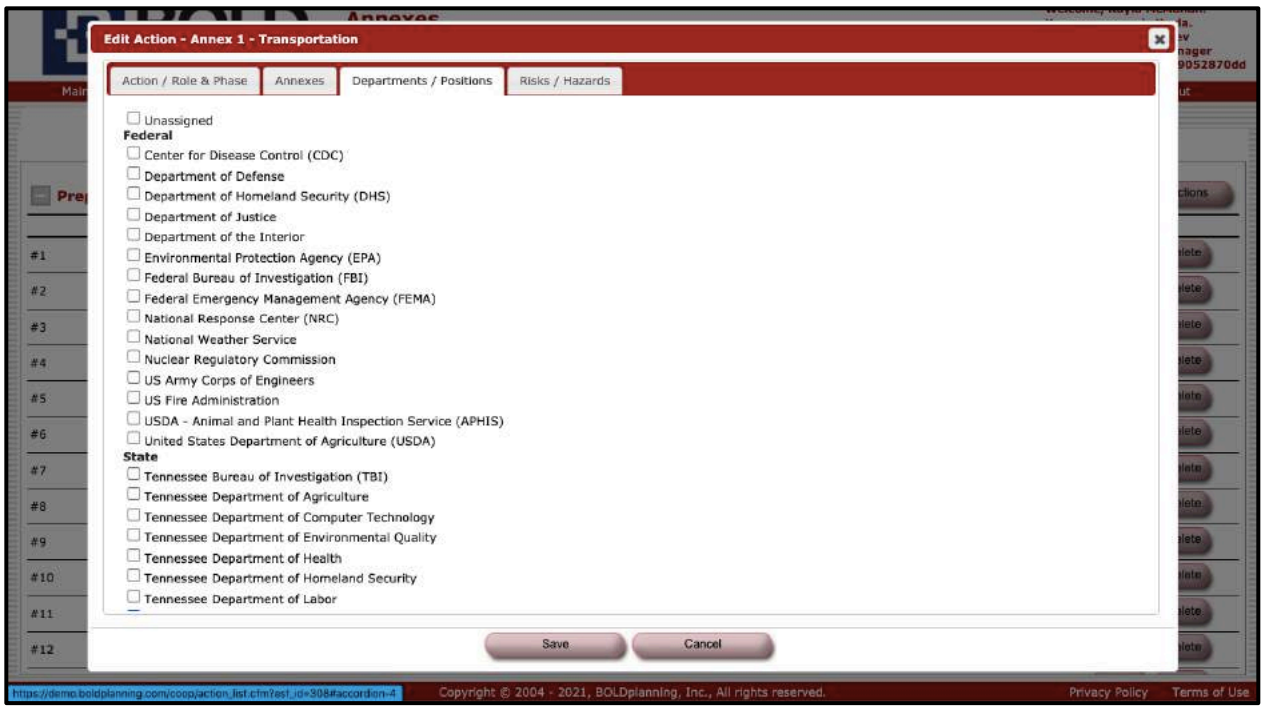



*Figure: Selecting Department(s)/Position(s) for an Annex Action*

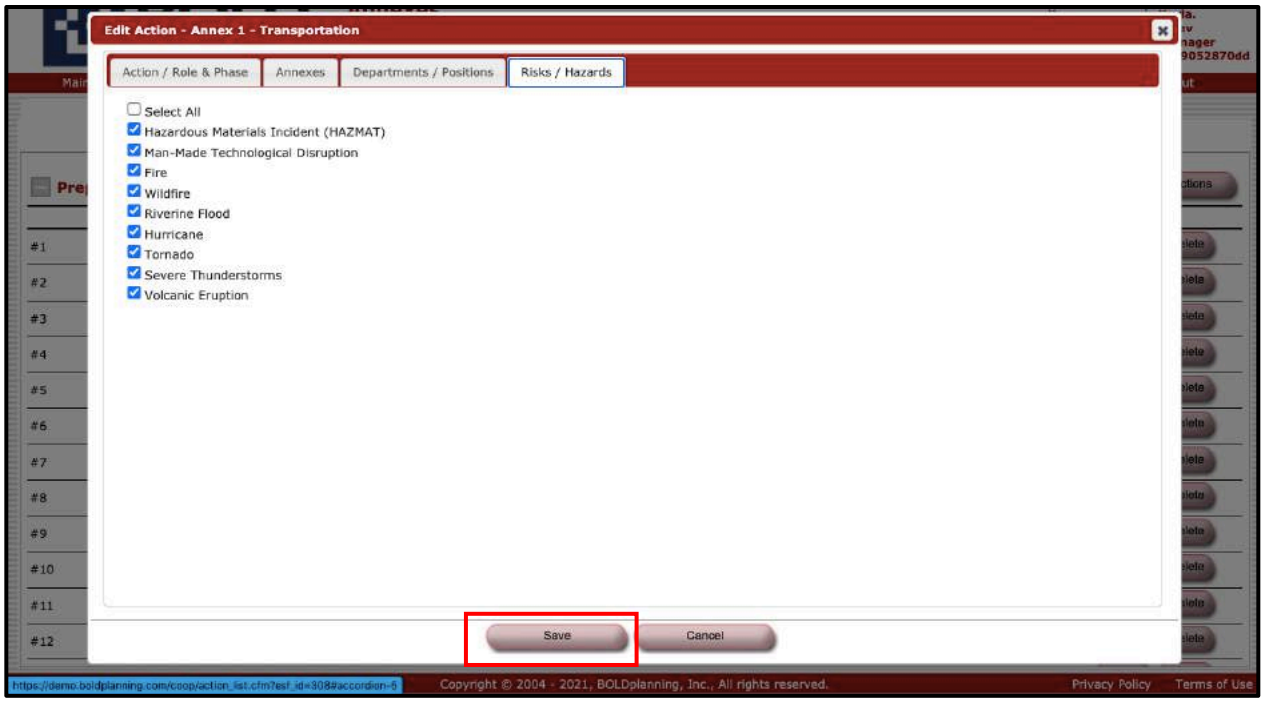



*Figure: Selecting the Risk(s)/Hazard(s) for an Annex Action and Clicking Save*

8. Click "Save" after linking all appropriate necessities for a given action.
    a. A yellow star will appear if all necessities for a given action are linked.

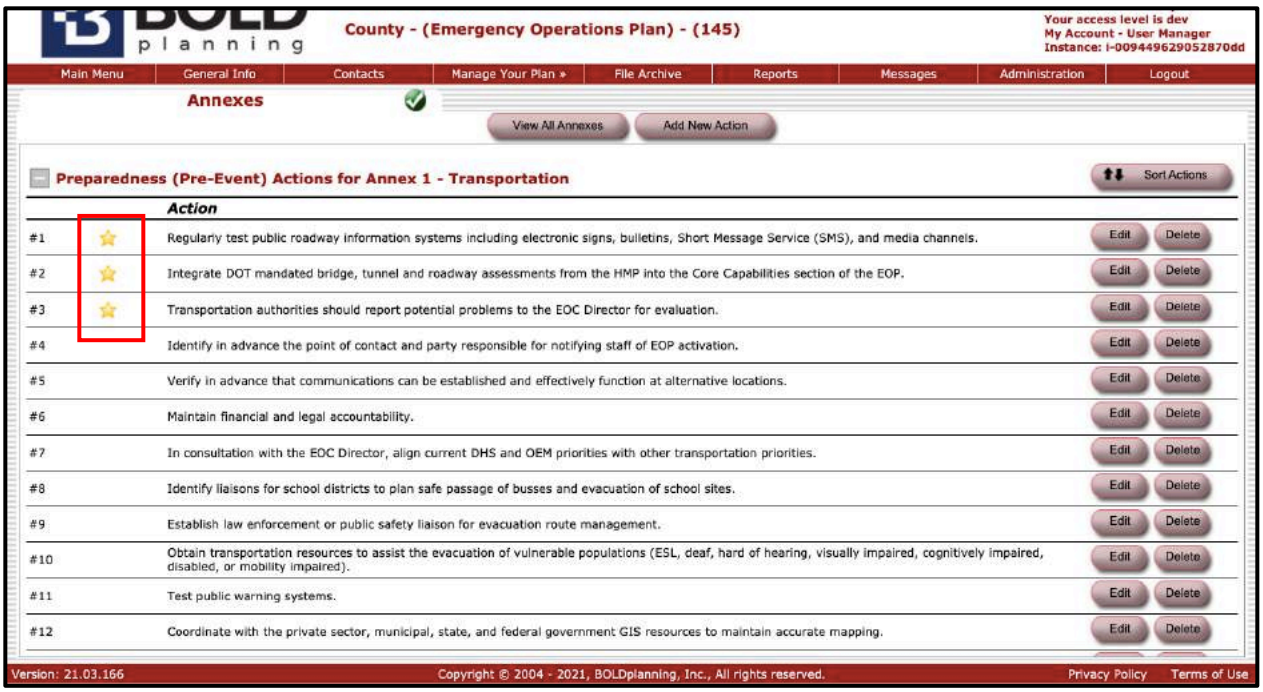
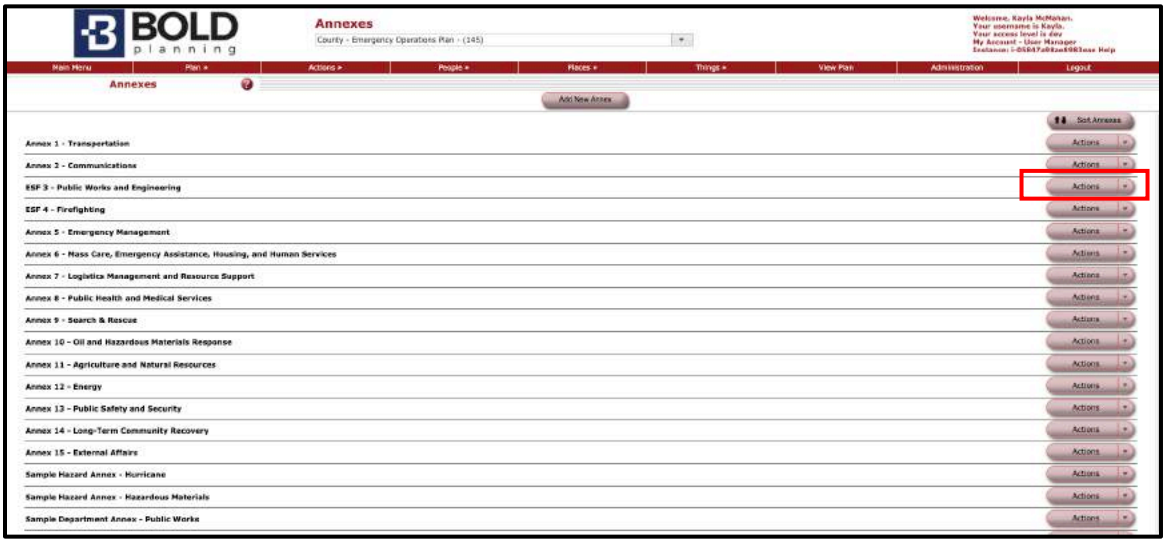



*Figure: Appearance of Yellow Star*

To view any section, agency, or actions of a policy/procedure, use the 'Actions' button/drop-down to go to the desired section.



# Communications

## Overview

Emergency communications methods and tools are listed here; remember to include basics like cellphones, 800mhz radios, email, and pagers, as well as less conventional mechanisms like social media, SMS or text alert systems, subscription services, and local television stations.

Remember to assign the priority and define the type (voice, face to face, data or other). Example would include Sirens = Face to Face, 800 mHz radios = Voice, Cell/Mobile Phones = Other (they include the ability to use data, Facetime, or visual communications and voice).

Describe how it is used and who has access to it in "Description" and any restrictions, such as school officials or EMA access only, or if it is used to transmit confidential data with HIPAA requirements, etc.

## Editing Communications

1. Start by clicking the "Communications" button on the Main Menu task button list.
2. Fill in the information on the communications resource screen by filling in the blanks and using the drop-down boxes:

   **Name of Communication:**

   **Priority:** (select low, medium, or high)

   **Type:** (select voice, face-to-face, data, other)

   **Quantity:** (fill-in field)

   (Check usage as)

   **Internal Use**

   **External Use**

   **Mobile Capability**

   **Secure**

   **Description:** (free-form fill-in box)

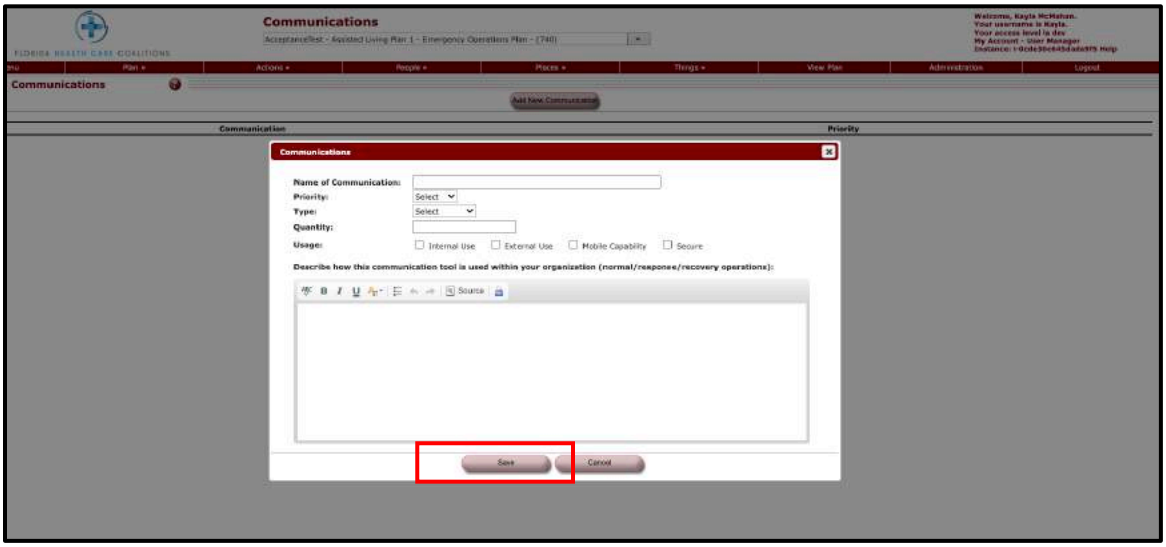



*Figure: Adding a Communication Method and Clicking Save*

# Alert Notification Procedures

## Overview

The purpose of alert notification procedures is to establish a strategy of how your organization would contact its personnel if an event/disruption were to occur (business hours/non-business hours). Refer to the "Help" button in this section for more detail about this topic.

You will see that suggested general procedures are already provided for:

- Initial plan activation
- First level contact of and by the response team (key staff members)
- Second level of contacts (remaining staff)

Please review these procedures and add specific information as it relates to your organization. Also note that many organizations already may have documentation in standard file formats covering this information. If so, you can note that in the relevant portion of this section, and then attach the files using the File Archive function.

## Adding and Editing the Alert Notification Procedures

1. Click the "Alert Notification Procedures" button on the Main Menu button list.

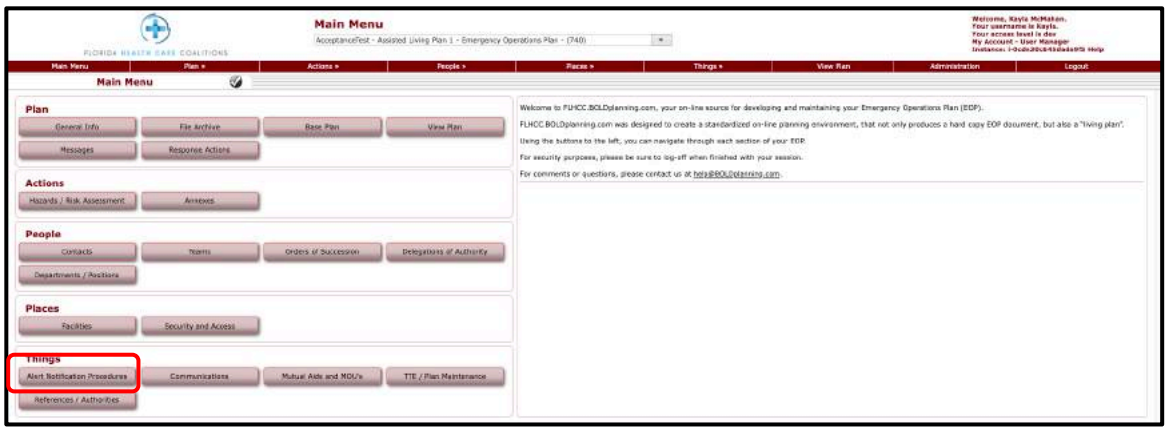



*Figure: Main Menu – Alert Notification Procedures*

2. Click the “Add New Procedure” button and enter the appropriate information.

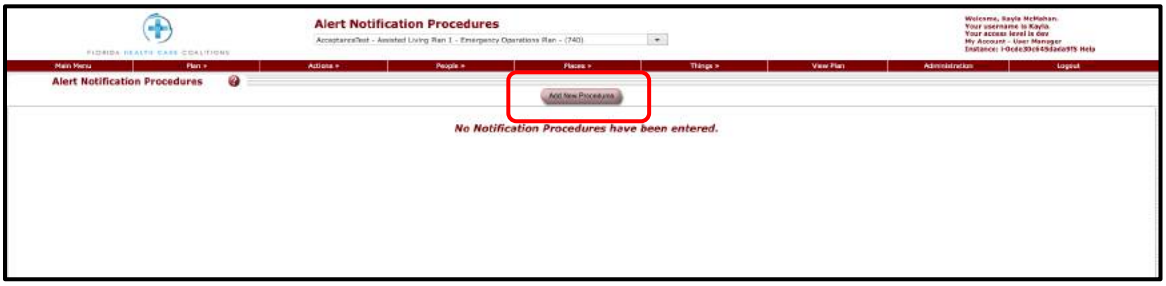



*Figure: Add New Procedures*

# Email Notification

## Overview

The purpose of email notification is to provide you with an alternate or additional email system. This is a supplement to your existing email system, and you are not required to use it.

## Sending an Email

1. Go to the Messages tab at the top of the Main Menu Page.

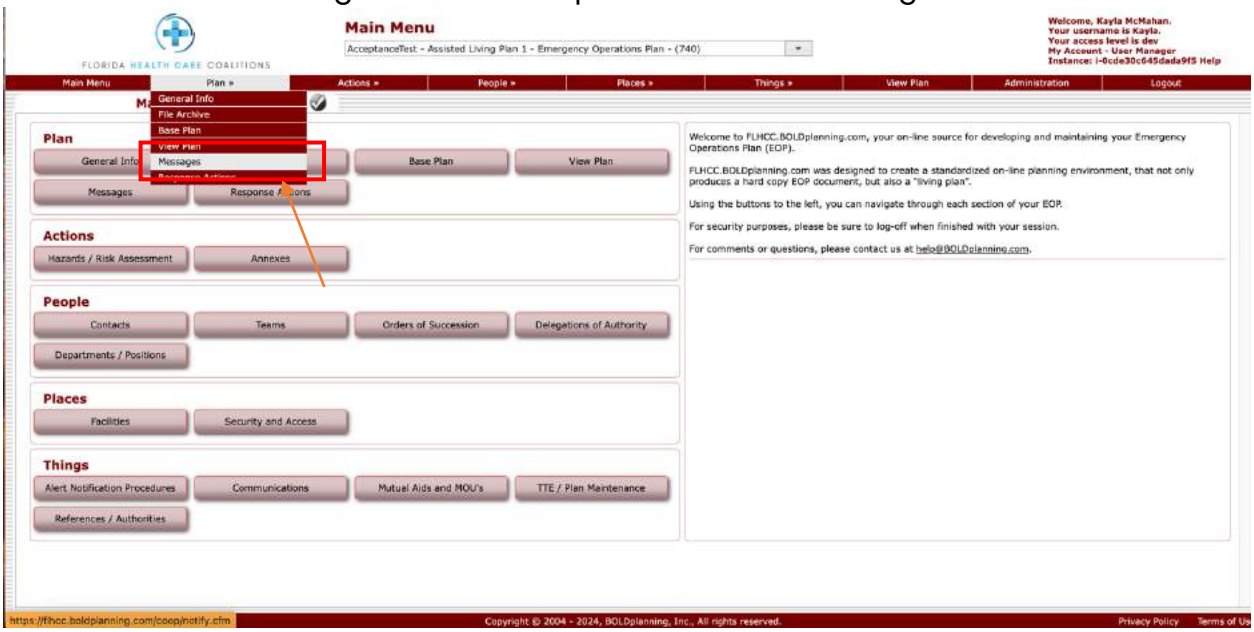



*Figure: Plan Tab*

2. Click on the “Compose Email” button**.**

*Figure: Compose Email Button*

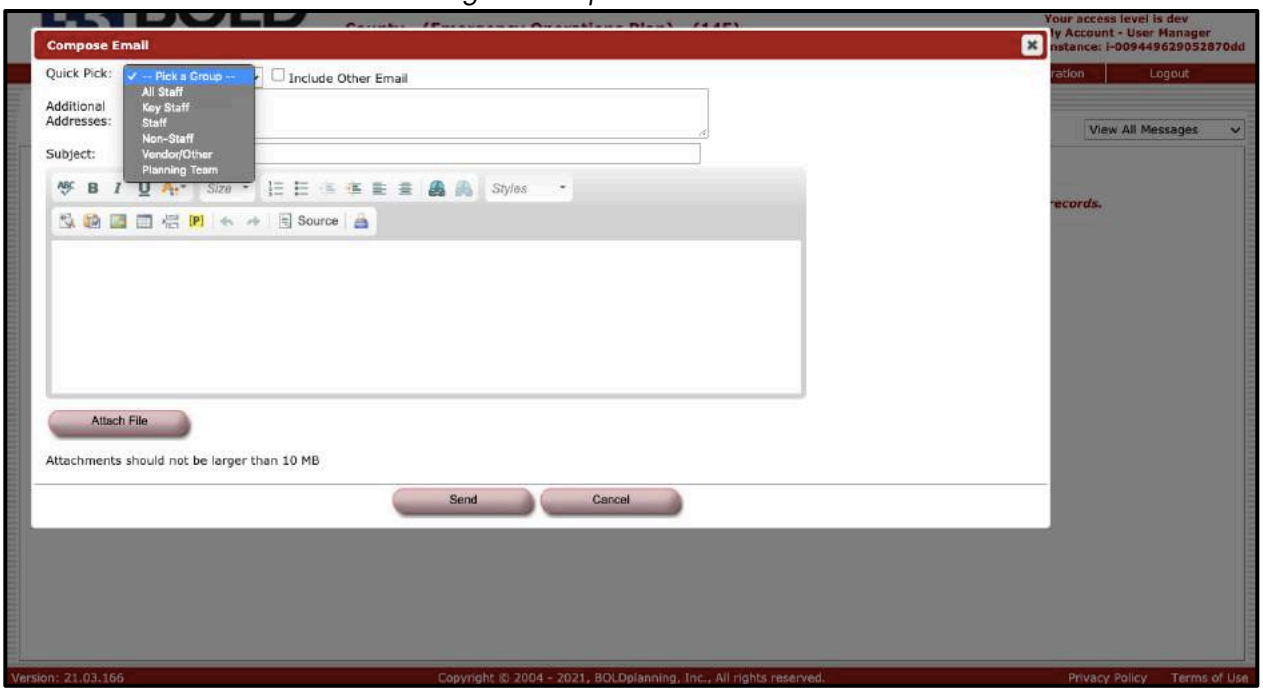



*Figure: Picking a Group to Email*

3. If you have entered contacts, labeled them under a certain category (e.g., all staff, key staff, staff, etc.), and entered an email address for that contact, you may choose which category of people you would like to send an email to.
    1. You may also choose certain teams you would like to send an email to, if you have entered contacts into certain teams in the Teams section.
    2. You may also enter other email addresses in the additional addresses field.
4. Type in a subject for the email.
5. Compose an email by typing in the open text field.
    1. You may also attach a file with your email.
6. Click the "Send" button.

# SMS Notifications

## Overview

The purpose of SMS notifications is to provide you with an alternate or additional notification system. You are not required to use it.

## Sending an SMS

1. Go to the Messages tab at the top of the Main Menu Page.

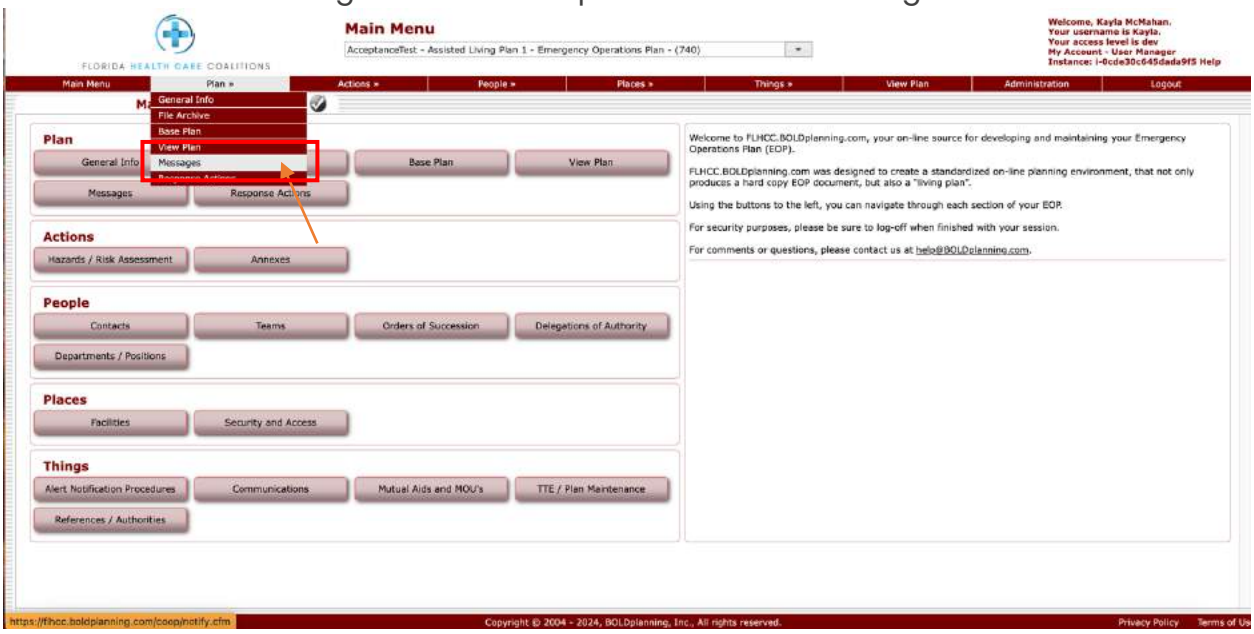



*Figure: Messages Tab*

2. Click on the "Compose SMS" button.

*Figure: Compose SMS*

3. If you have entered contacts, labeled them under a certain category (e.g., all staff, key staff, staff, etc.), entered a cell phone number for that contact, you may choose which category of people you would like to send an SMS to.
    a. You may also choose certain teams you would like to send an SMS to, if you have entered contacts into certain teams in the Teams section.
    b. You may also enter other cell phone numbers in the Additional Numbers box.

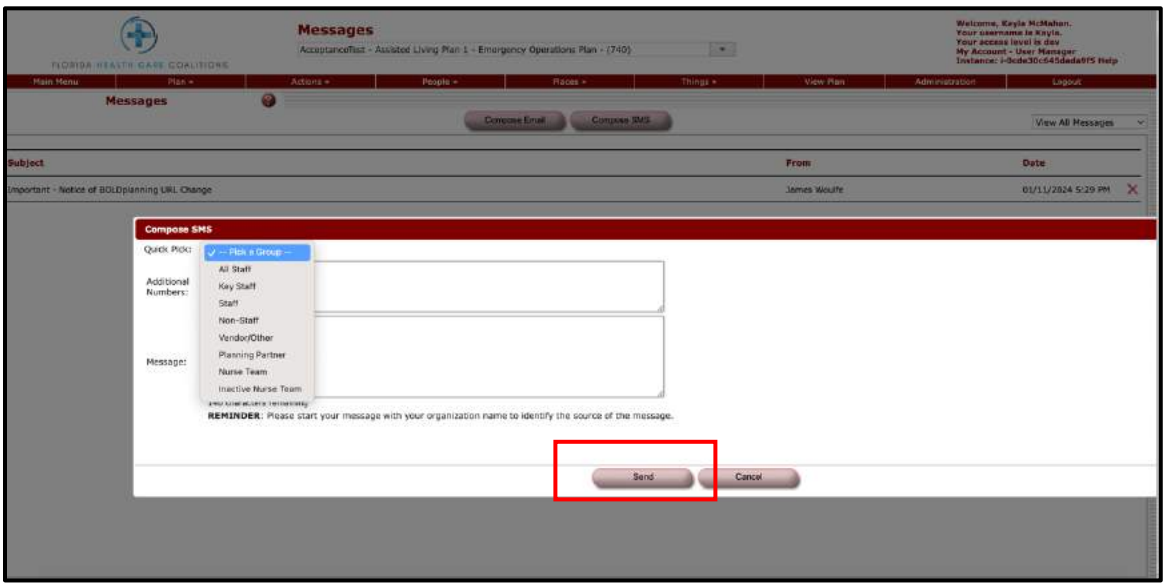



*Figure: Picking a Group to Send an SMS to and Clicking the Send Button*

4. Type the information for the SMS in the message box. It may be up to 140 characters.
5. Click the "Send" button.

# View Plan

## Overview

Reports from and for your plan are automatically populated with your data and formatted as you fill in the screens, and the better the data is that you include, the more complete and more useful your reports will be. Your reports can be accessed either through the Main Menu or the navigation bar.

## Reviewing Your Plan

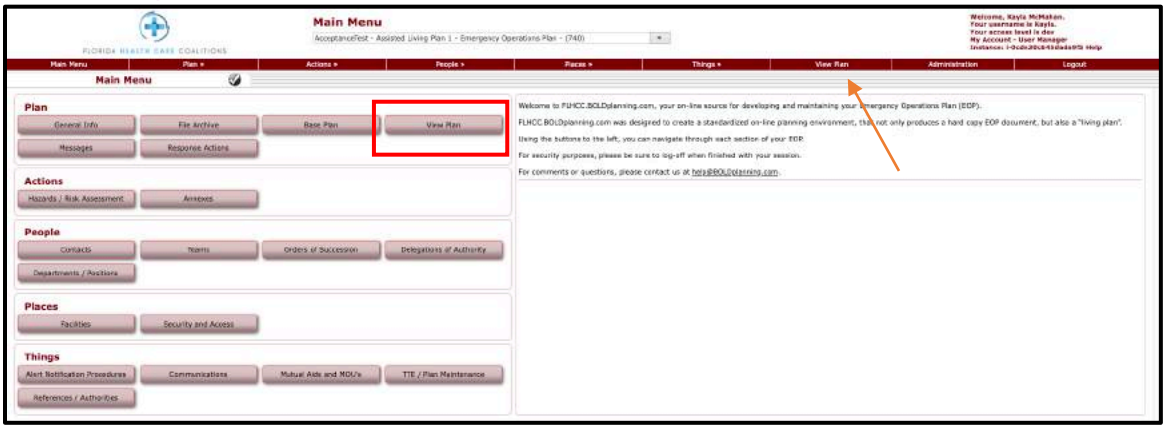



*Figure: View Plan on the Main Menu*

The following are the two main categories of reports available from the View Plan screen:

1. Base Plan (refer to red square in Figure 1): The narrative portion of your plan. The base plan lists the authorities and references and describes, in narrative form, the concept of operations, procedures and the different phases of an event (activation, alternate operations and reconstitution). Most of the base plan is common to all plans. It contains the general overview of what the plan is, its various parts, and how it will be activated.
2. Annexes (appendices) (refer to red square in Figure 2): This is the data for your plan in list and table form. The annexes have most of the specific data related to your organization.

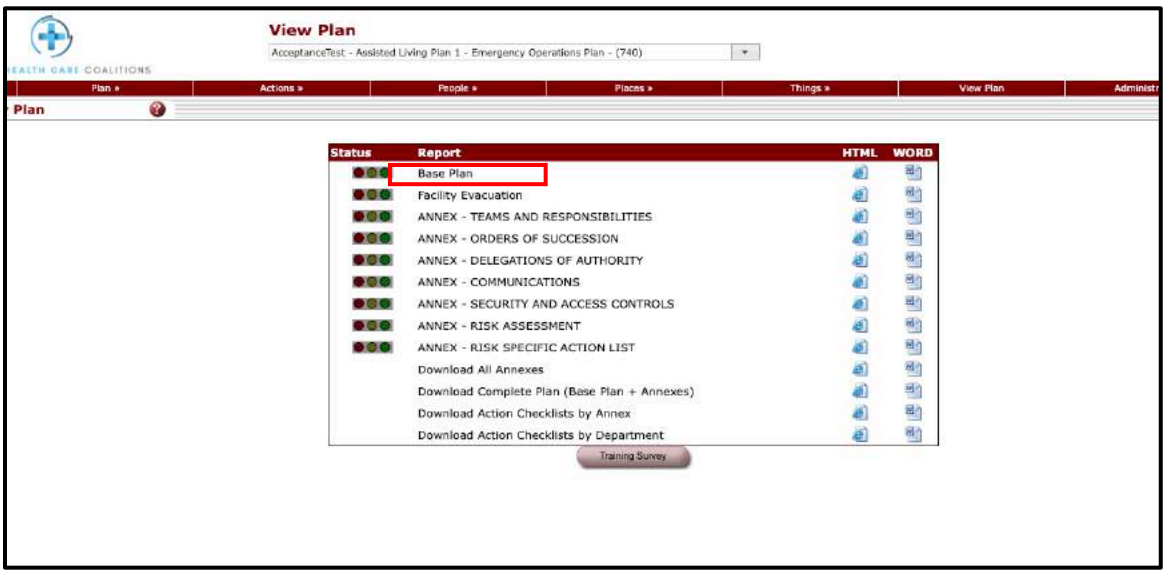



*Figure: Reports*

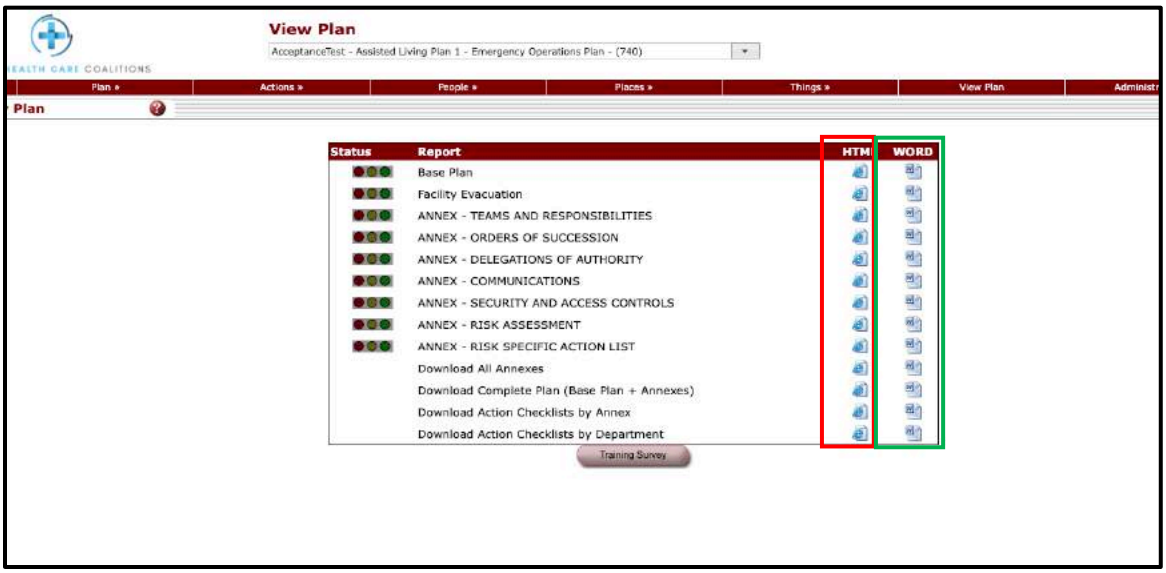



*Figure: Reports/Annexes*

Your organization may or may not make use of all the annexes, but if you do, most of the various reports can be formatted in three ways (refer to green square in Figure 2):

- **HTML**
- **Word**
- **Summary** (Excel spreadsheet)

HTML is good for a quick look at how the report will look if you have no need to save it

or print it out immediately. Word format is for final saving or printing. The summary format, using Excel, is useful if you want a more concise format or easier manipulation of the data.

## How to Download Action Checklists by Department

After developing annex actions and assigning them to department/positions, the BOLDplanning platform offers the ability to run a report which downloads all annex actions created within each annex. Actions are broken out into check lists both by the phases and are also assigned to the department or agency responsible for them and the hazard they directly pertain to.

1. Click on the Reports tab on the Main Menu Page.

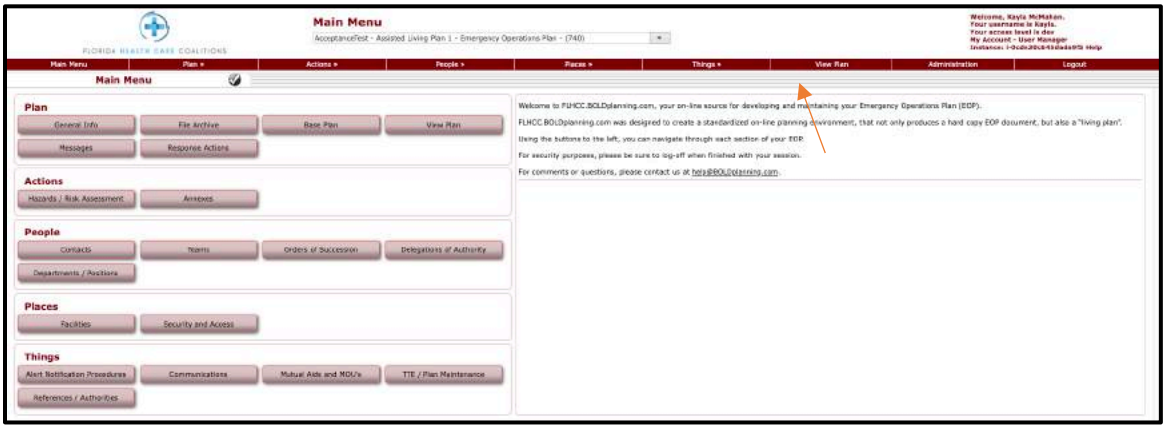



*Figure: Clicking the Reports Tab on the Main Menu*

2. Scroll down to the very bottom of Reports and click either the HTML download or the Microsoft Word download for "Download Action Checklists by Department."

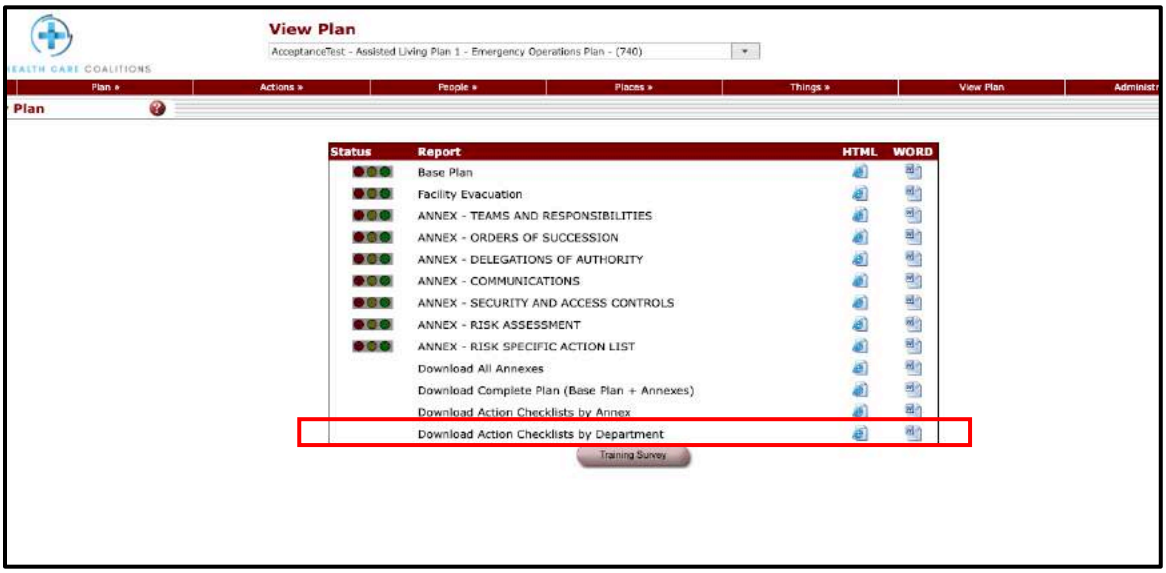



*Figure: Clicking the Desired Download for "Download Action Checklists by Department"*

3. The downloaded version will then download with all actions by department/position for each annex.

**Annex 1 - Transportation**

| Coordinating: Fulton County Public Works and Drainage | |
|---|---|
| ***Preparedness (Pre-Event) Actions for Annex 1 - Transportation*** | |
| 1 | Regularly test public roadway information systems including electronic signs, bulletins, Short Message Service (SMS), and media channels. |
| 2 | Integrate DOT mandated bridge, tunnel and roadway assessments from the HMP into the Core Capabilities section of the EOP. |
| 3 | Transportation authorities should report potential problems to the EOC Director for evaluation. |
| ***Response (During Event) Actions for Annex 1 - Transportation*** | |
| 1 | Deploy additional staff if the emergency exceeds the existing Transportation and Resources staff's capabilities. |
| 2 | Obtain ancillary resources as dictated by the emergency. |
| ***Recovery (Post Event) Actions for Annex 1 - Transportation*** | |
| 1 | Plan recovery, reconstitution, and other long-term actions. |
| 2 | Coordinate and perform damage assessments on infrastructure, transportation systems, facilities and equipment. |
| 3 | Plan for the gradual shut down of emergency transportation operations. |
| ***Mitigation Actions for Annex 1 - Transportation*** | |
| 1 | Participate in the hazard identification process and identify and correct vulnerabilities. |
| 2 | Identify responsibilities for liaison roles with state and neighboring communities' transportation officials. |
| 3 | Participate in mitigation planning team meetings and work with local emergency management to promote community preparedness. |
| ***Vulnerable Needs Actions for Annex 1 - Transportation*** | |
| 1 | Implement protection, resilience, and continuity planning, programs, trainings and exercises. |
| 2 | Determine requirements for protected stakeholder information sharing. |
| 3 | Determine jurisdictional priorities, objectives strategies, and resource limitations. |

**Annex 1 - Transportation**

| Primary: Fulton County Public Works and Drainage | |
|---|---|
| ***Preparedness (Pre-Event) Actions for Annex 1 - Transportation*** | |
| 1 | Regularly test public roadway information systems including electronic signs, bulletins, Short Message Service (SMS), and media channels. |

*Figure: HTML Download of Action Checklists by Department*

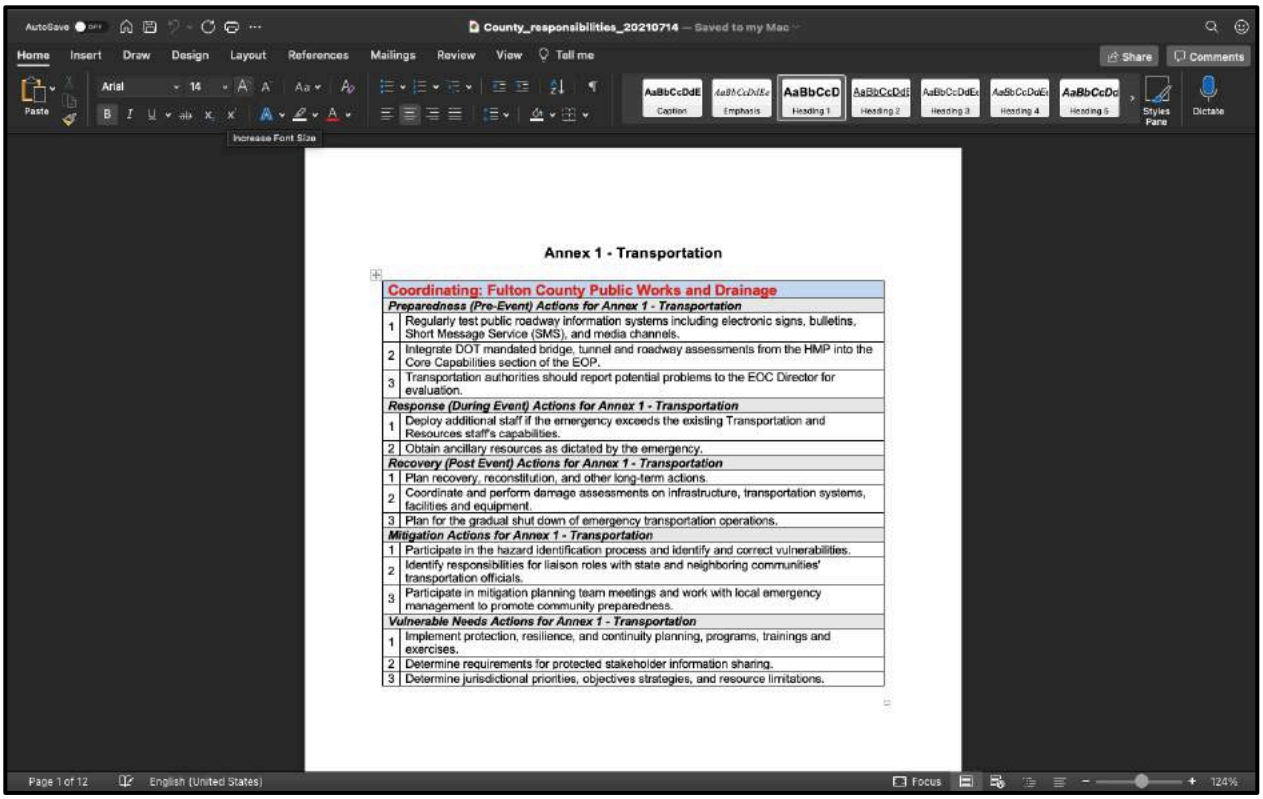



*Figure: Microsoft Word Download of Action Checklists by Department*

# Inline Images

## Overview

A picture really is worth a thousand words. That's why we've made it easy to incorporate previously created infographics, diagrams, maps, and other images into the BOLDplanning.com platform. Simply access the inline Images feature in the text editor, and voila! You can add and edit images, or even make them clickable links to other important webpages.

## Adding Inline Images

1. **Discuss with your planning team the image you want to add**
    - Certain images might be too sensitive to share in distributed copies of the plan and are, therefore, better served in the File Archive protected by your BOLDplanning.com password.

2. **Navigate to the section of the plan where you want to add the image**
    - In this example, we'll use alert notification procedures
    - Make sure the section where the image is going to be inserted has the full line text editor (shown in red below)
    - Next, click on the images icon (outlined in blue below)

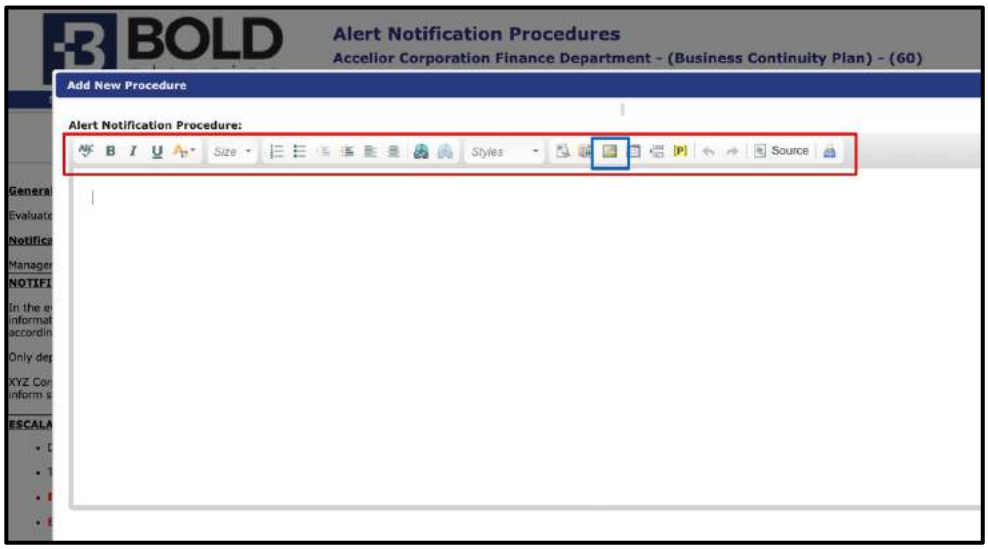



*Figure: Add New Procedure Window in a BOLDplanning.com Business Continuity Plan (BCP)*

3. **Use image properties to add, edit, and/or link your image**
    - Choose “Browse Server”
    - Select the Images folder on the left
    - Click “Upload” and select your image (image filenames cannot contain spaces or special characters)
    - Click on the newly uploaded file to edit the size, if necessary (600px will span the width of a Word® doc with typical margins)
    - Click “OK”

# Test, Training, and Exercise (TTE)

## Overview

All planners should be tracking activities through the TTE/Plan Maintenance module of your system. All plan updates, participation in meetings and exercises need to be tracked.

## Adding Events

a. From the Main Menu, navigate to the TTE/Plan Maintenance module by clicking on the button in the Main Menu.
b. Click the “Add New Event” button.
c. Select the date of the event, whether in the past or in the future. Check the “Send Reminder” box if you would like the system to automatically send email notices to users with access to your plan at 30 days and 10 days prior to the event.
d. Select the event type
e. Select the event status: scheduled or completed
f. Enter an event title
g. Add a brief description about what you updated in your plan, or about the exercise, meeting, or activation that you participated in. You may also want to upload supporting documents to your File Archive and reference the file here. Hyperlinking to the document is also supported.
h. Click “Save” when finished.

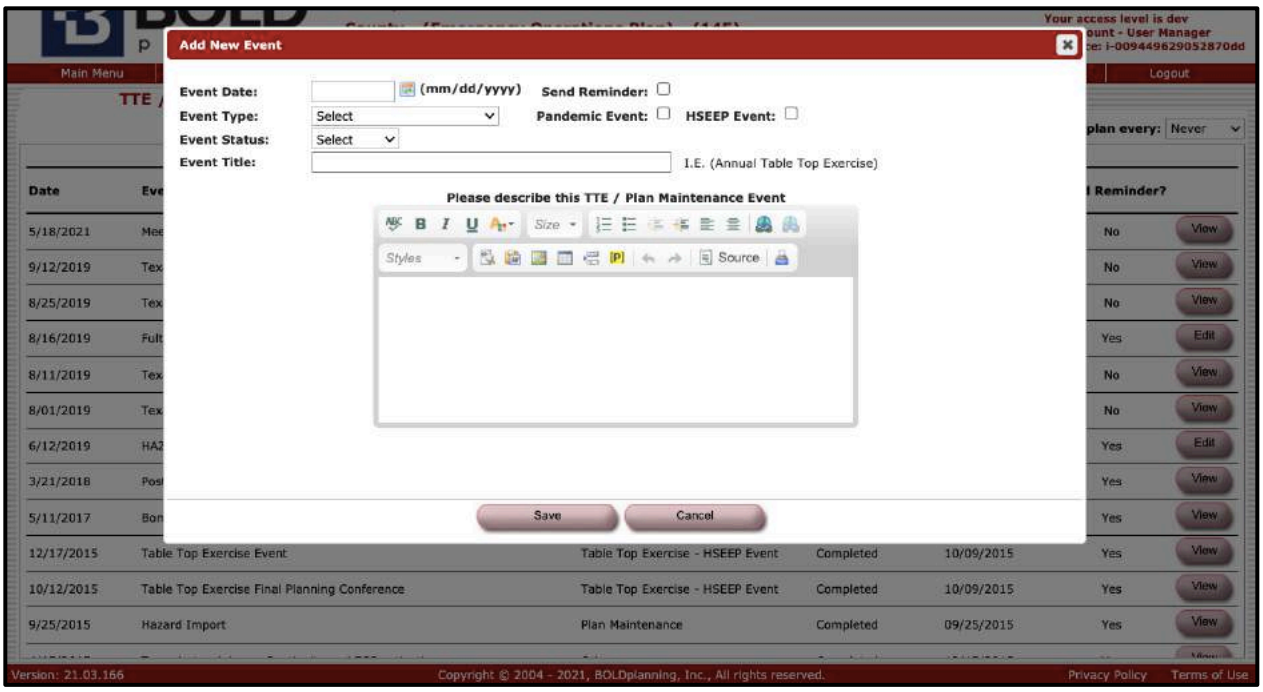



*Figure: TTE/Plan Maintenance Details Page*

## Maintaining a Log of All Events

Keeping an updated list of all events (plan maintenance updates, meeting participation, exercises, and real-world event activations) is an essential component of a compliant plan. See below for an example of an updated TTE/Plan Maintenance module.

| Date | Event Title | Event Type | Status | Create Date | Send Reminder? | |
|---|---|---|---|---|---|---|
| 5/18/2021 | Meeting at Wendys | Table Top Exercise | Scheduled | 05/12/2021 | No | View |
| 9/12/2019 | Texas EOP Phase 4: TDEMA Rollout and Ongoing Support | Other | Scheduled | 05/22/2018 | No | View |
| 8/25/2019 | Texas EOP Phase 3: Project Execution | Other | Scheduled | 05/22/2018 | No | View |
| 8/16/2019 | Fulton County Mass Casualty Exercise | Full Scale Exercise - HSEEP Event | Scheduled | 12/15/2015 | Yes | Edit |

*Figure: List of TTE/Plan Maintenance Events*