

BOLDplanning Continuity of Operations Guide

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Document Purpose

BOLDplanning offers this planner a user guide to show how to create, update, and report on your continuity plan. It shows how to enter, edit, and review data about:

- Your locations (primary and alternate facilities)
- Your people (contacts database)
- Your organized human resources (teams)
- Your information (essential resources)
- Your activities (essential functions)
- Your responsibilities (orders of succession and delegations of authority)

This guide leads you through the simplest process for completing your plan. The system is designed so that when you enter information once, it will populate in many sections throughout the plan automatically.

When you begin entering information, concentrate on primary facilities and contacts first. Since this information will be needed in multiple locations throughout the plan, entering this information first will help increase your efficiency and minimize duplicating data entry and repeating various steps.

This is only an introduction to plan development; something to get you started. This document can also be used as a post-training refresher and to remind you how to perform key tasks.

Note: Avoid using unusual special characters, as they will not be recognized by the system. We recommend you only use! = $_ . * ' ()$

Additional Help and Technical Support

For detailed information about your continuity plan, use the system's "Helper Tips (?)" buttons. These are question marks in round buttons found on most of the screens. Run your cursor over the question mark button, and a pop-up message will provide additional information. Move your cursor off the button and the message disappears. Also, the staff at BOLDplanning is here to assist you with all aspects of your plan development. At any time, email or call for immediate technical support and customer services.

- Help@BOLDplanning.com
- (615) 469-5558

Accessing Your Plan

Your Continuity Plan 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 continuity plan website is:

Plan Login Screen

BOLDPLANNING.COM PLANNING PLATFORM

The centerpiece of your organization's continuity 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 department will have a primary continuity planner/planning team chief who will act as the primary point of contact for the entire process. Password access will be granted to the planning team chief, 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 planning team chief, 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. <u>Password:</u> 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 and 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. Check 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.
- 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 continuity planning system. <u>Your password must be STRONG (green) to be accepted.</u>

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 department 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.
- 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. And from the main menu, you can access all other sections of your plan.

A Important: When you are using the continuity 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.

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COOP- Main Menu; "People," "Places," or "Things"

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.

	Main Menu	General Info	Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout	
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Import Contacts: "Contacts" tab from BOLDplanning COOP 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. 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.

Attaching, Deleting, and Replacing a File in the File Archive

1. Click on the "Plan" tab and select 'File Archive.'

View Plan Administration Logout
ng.com, your on-line source for developing and maintaining your
In an (Corp.) designed to create a standardized on-line planning environment, s hard coxy CODP document, but size a "Wining plan", e left, you can navigate through each section of your COOP plan, lease be sure to log-off when finished with your session, ons, please contact us at <u>heligibleCubylanning.com</u> .

File Archive

2. Click the "Upload File" button near the top of the File Archive screen, or if you wish to create a new folder, click the "Add New Folder" button and type in the name of the file then click "Save."

planning			Instance: I-	User Manager 17d7b2ed9f5962edd
Main Menu General Info Contacts	Manage Your Plan File Archive	Reports Messages	Administration	Logout
File Archive				
Documents	Upload File	Search		
Alert Notification Procedures Edit	Description	Uploaded By	Upload Date	
Command and Control (CAC) Edit				
Communications Edit				
Contacts Edit	N			
Delegations of Authority Edit				
Departments (EOP) Edit				
Devolution Edit				
Drive-Away Kits Edit				
Sessential Functions (ECP) Edit				
Facilities (SEC) Edit				
Facilities / Sites (EOP) Edit				
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Family Disaster Plan Edit				
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Jurisdiction Profile (EOP) Edit				
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Uploading a file – File Archive

3. If you have chosen to upload a file, choose the category. Use the drop-down "Select Folder" menu (see green arrow) to choose what folder you would like to upload into (contacts, facilities, teams, orders of succession, etc.).

D planning	*MasterSystem* - (COOP) - (-1)		Your access My Account Instance: H	level is dev - User Manager 07d7b2ed9f5962edd
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Alert Notification Procedures Edit	Upload Files	opionona oy	opioso para	
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Communications Edit	Step 1: Choose a category			
Contacts Edit	Category:Select Folder V			
Delegations of Authority Edit	Step 2: Enter Description(s) and Select the File(s)			
Departments (EOP) Edit				
Devolution Edit Drive-Away Kits Edit	Description:			
Essential Functions (ECP) Edit	Upload: Choose File No file chosen			
Pacilities (SEC) Edit	Description:			
Facilities / Sites (EOP) Edit	Upload: Choose File No file chosen			
Facility Evacuation Edit	Description:			
Family Disaster Plan Edit	Upload: Choose File No file chosen			
General Documents (SEC) Edit	Description:			
General Documents / Other (EOP) Edit	Upload: Choose File No file chosen			
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an. 21.03.164	Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.			Privacy Policy Terms

Uploading a file – File Archive

- 4. Enter a description of the file (see orange arrow) and then browse for the file (see red arrow). This works like a standard Windows browse function. You can attach more than one file at a time if they are all going into the same category (folder).
- 5. Click on the "Upload File" button. (Note: this process may take a few seconds.)

Dplanning	*MasterSystem* - (COOP) - (-1)		Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f5952edd
Main Menu Beneral Info	Contacts Manage Your Plan + Tile Archive 3	Reports Messager	Administration Logout
File Archive Documents Add New Feature	Uploot File	Starth	
Alert Notification Procedures Edit Command and Control (CAC) Edit Communications Edit Contact Edit Desolution of Authority Edit Desolution Edit Devolution Edit Devolution Edit Practities (SEC) Edit Facilities (SEC) Edit Facilities (SEC) Edit Facilities (SEC) Edit General Documents (Other Edit General Documents (Other Edit Smith	Upload Files Step 1: Choose a category Category: TE / Plan Maintenance Step 2: Enter Description(s) and Select the File(s) Description: Upload: Upload: Choose File Description: Upload: Description: Cancol Upload: Cancol Description: Cancol Upload: Cancol Description: Cancol Upload: Cancol Description: Cancol Upload: Cancol Description: Description: Upload: Cancol Description: Description: Upload: Cancol Description: Description: Description: Description: Upload: Cancol Description: Description: Description: Descrip	Scanner Dame Scanner Dame	04/08/2021 × 04/08/2021 ×

Uploading a file – File Archive

6. Check to see that the correct file(s) have been uploaded and that they are correctly categorized.

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Main Menu General Info Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
File Archive						
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Pandemic Items Edit						
Policies / Procedures (ECP) Edit						
References / Authorities (EOP) Edit						
Security and Access Edit						
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Continuity Help Files Edit						
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- 🔁 2020-07-13 Quick Sheet - Inline Images.pdf	Quick Sheet - Inline Imag	es		Site Administrator	07/15/2020	×
BOLDplanning Continuity Plan Maintenance Cycle.docx	Plan Maintenance Cycle G	uide		Site Administrator	03/06/2020	×
Continuity Webinar Trainings Edit						
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ion: 21.03.164	Copyright @ 2004 - 2021,	BOLDplanning, Inc., All rig	ghts reserved.			Privacy Policy Terms

Uploading the correct file – File Archive

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

General Information

Overview

General Information

Provides background and specific information pertinent to your organization and your plan. It has a single screen of drop-down boxes and free-form data entry forms. Some of the drop-down boxes are pre-filled for you, and you will not be able to change them.

The "General Information" section uses two terms which have specialized meanings within the context of the plan. These are:

• **Supersession**: A statement identifying whether this is your company's first continuity plan or if it is replacing a previous continuity plan.

Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
Gene	ral Info	00						
Hission Statement			₩ 8 / <u>U</u> A+ E		_			
Supersession			ves * No O					
Is this plan locked (read-	only)?		Yes O No @					
Is reporting disabled?			Yes 🔾 No 🖷					
Has this plan been forma	ly approved?		Yes 🜒 No 🔿					
Action Date			(mm/dd/yy	ev3				
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What Organization is resp for activating computers,	onsible systems at alternate facilitie	es?			ample: (Smith County IT Depart			
What Organization is des	gnated for Devolution?			Ex	ample: (Smith County IT Departs	ment)		
Aurolia (191-02164 /			Bandaht in 20	AN Cancel	and the second s			Delusery Deliny - Tarmer of Lie

Figure: General Info – Supersession

• **Devolution**: The transfer or delegation of responsibility for your organization's functions in the event of a disruption of operations.

General Info Hission Statement Filosion Statement Supercassion Supercassion Is this plan active? Is this plan active? Is this plan active? Is this plan active? Is this plan backed (read-only)? Is reporting disabled? Hos (imm(dd/yryy)) Is (imm(dd/yryy)) Is (imm(dd/yryy)) Is (imm(dd/yryy)) Is (contry IT Coentruent). Example: (Smith County IT Coentruent).		Main Menu
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Supersession Yes * No O Is this plan active? Yes * No O Is this plan locked (read-only)? Yes O & O Is this plan locked from alfy approved? Yes O & O Action Date Immedityyyy) Exploration is responsible Immedityyyy) What Graphitation is responsible Immedityyyy) Exploration is responsible Immedityyyy)		
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What Organization is responsible for activating computers/system: at alternate facilities?		ction Date
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	nization is responsible ing computers/systems at alternate facilities?	that Organization is res or activating computers
What Organization is designated for Develotion? Example: (Smith County IT Department)	nization is designated for Devolution?	/hat Organization is des
Stree Concel		

Figure: General Info- Devolution

Please refer to the "Help" button on the "General Information" screen for additional information about supersession and devolution. You may also wish to discuss devolution issues with your organization's management team.

There is no specific report for the information captured on this screen. This

information is used throughout the various plan report sections.

Editing the General Information Screen

State: Choose your state from the drop-down box.

Main Menu	General Info	Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
Genera	l Info	00						
								*
Plan Type:			C00P 🗸					
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State:			Arkansas 👻					
			. Secondaria					
Name of Organization								
Abbreviate Name of Organiz	ation?		Yes 🔿 No 🕏					
			≪ B / U A- E ∈					
Mission Statement								
HILLING STOLENCING								
			≪ B / U Ar. E :	B				
Supersession								
Is this plan active?			Yes 💭 No 🔿					
Is this plan locked (read-onl	v)7		Yes O No 🖲					
Is reporting disabled?			Yes C No ·					
Has this plan been formally :	approved?		Vez 👼 No 🔾					
Wersion: 21.03.164			Copyright @ 2004	- 2021, BOLDplanning, Inc., All	rights reserved.			Privacy Policy Terms of Use

Figure: Choose your State

Name of Organization: Your organization's plan name is listed here; this name can be edited if necessary.

Main Menu	General Info	Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
Gener	al Info	00						
Plan Type: Master Plan: State: Name of Organization Abbreviate Name of Organ	Jacobian 7		COOP					·
Mission Statement			≪ 8 / U A+ E (<u>-</u>				
Supersession			≪ s t <u>U</u> ∧r. ⊨ :	A				
Is this plan active?			Yes 🖲 No 🔾					
Is this plan locked (read-o	enty)?		Yes 🔘 No 🖲					
Is reporting disabled?			Yes 💭 No 💌					
Has this plan been formall	y approved?		Vez \min No 🔘					

Figure: Type the Name of Your Organization

Abbreviate Name of Organization: Select "yes" if you wish to have a shorter designation for your organization utilized for the continuity planning reports. If you check yes, you will be provided with a field in which to enter the abbreviated name.

Main Menu	General Info	Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
Gene	ral Info	99						
Plan Type:			COOP 🗸					
Master Plan:			DEMO Fulton County 🛩 🧶					
State:			Ārkānsas 🗸 🗸					
8.000 K000+								
Name of Organization		_						
Abbreviate Name of Orpa	nizetion?	C	Yes 🖲 No 🔾					
Organization Abbreviatio	n:			Example: (1	Smithville PD or SPD)			
			₩ BIUATE	- A B				
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Figure: Abbreviating the Name of Your Organization

Department Head: Click on the drop-down to the right of department head. Then select the appropriate name from the contacts database. This name will now appear as the department head.

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Figure: Assigning a Department Head

Primary Continuity Planner: Click on the primary continuity planner drop-down. Then select the appropriate name from the contacts database. This name will now appear as the planner. This is the individual primarily responsible for developing the plan and maintaining the planning process.

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Figure: Assigning a Primary Continuity Planner

Mission Statement: Use the free-form data entry box to write in your organization's mission statement or description. You can also do a copy-paste from another document containing your mission statement.

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Figure: Mission Statement

Supersession: Use the free-form data entry box to write in your organization's statement of supersession. If this is your first plan, you may state that this is your first plan, not superseding any other plan.

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Figure: Statement of Supersession

Has this plan been formally approved? Leave as "No" until your management has approved your Plan.

What organization is responsible for activating computers/systems at alternate facilities? This is generally either your internal IT group or the IT group responsible for your entire organization.

Click "Save."

Teams

Overview

There are teams that you will need to identify for your plan. The system comes standard with the following two teams that you can use or delete, as necessary. They are the planning team and the continuity team. You, as a planner, are always a member of the planning team, which develops the initial plan.

The planning team is responsible for all pre-event planning, plan development and maintenance, training, and exercising. The continuity team, or emergency relocation group, is responsible for acting after an event following the plan.

• Minimum standards for teams: Planning and continuity teams are required.

All team members also have significant additional responsibilities. Refer to the "Help" button on the Teams screen of your plan for additional information on these responsibilities.

You should assign at least two, and ideally three or more, members to each of your teams. You will need to make sure that the members of the team cover all the responsibilities listed for each team.

You also have the option of creating new teams, for any purpose you wish, and give the new team(s) any name you wish to call them.

Remember, any new team member **must** already be listed in the contacts database before you can proceed to build your teams. This is the process for building team:

Assigning Yourself to the Planning Team

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

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				For comments or qu	entions, please contect us at <u>heig</u>	050LDalaming.com		
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Figure: Main Menu – Teams

5 Public Health Department - Director's Office, Administration and Finance - (COOP) - (153) Your access level is dov My Account - User Manager Instance: I-07d7b2ed9f5962edd planning eneral Info 00 Teams 11 Sort Teams Assign New Member Add / Edit Team(s) Executive Team 🌒 Name / Title / Contact Justin Bunch Executive Team Role (Project Manager) Will identify all team members and schedule all planning efforts. Manage the collection of data for the Business Continuity Plan (BCP) / Continuity of Business Plan (COB). Administrator W: 615-142-1208 H: 865-776-9722 C: 615-120-4051 Mike@work.com (Executive) Provide a letter of executive management support for the planning effort. Allocate departmental resources for training, plan development, and exercising. Approve the final Business Continuity Plan / Continuity of Business plan. (Master Level Data) Mike Pope (Facilities) Serves as the primary point of contact for all facility issues including security, maintenance, damages, and relocation alternatives. Will identify all building and facilities to be covered by the Business Continuity Plan. Provide information about security, access, and evacuation procedures. Assist all departments with alternate facilities options and priorities. Research Automation Billing W: 615-741-1478 H: 615-963-6321 C: 615-963-1236 mike@work.com (Master Level Data) (IT) Servers as the primary point of contact for all IT issues including system availability, disaster recovery, telephones, and communications. Will identify all vital records and systems and provide details regarding bad-ups, redundancy, and Disaster Recovery (DR) planning. Review all departmental IT requirements for essential functions. Provide on-site support for IT inabiaed issues during disruptors or relocations. Pandemic Team 🌒 14 Sort Members Name / Title / Contact Sue Burns Pandemic Team Role Establish contact with local public health officials for coordination with local pandemic planning efforts. Ensure that the organization is aware of and possibly involved in current local programmers and planning efforts. Ensure that the organization is kept informed of current local conditions and response efforts concerning a pandemic event. Develop mutual aid programs with neighboring organizations at the city, county, state, and/or private sector level. Manager Risk Management W: 615-451-2163 H: 615-632-6413 C: 615-345-1023 (Master Level Data) C: 615-345-1023 sue@work.com Jan Baker Captain Fire Department W: 615-398-7531 H: 615-698-9681 C: 615-895-3697 A: 564-851-5542 jan@work.com Ensure that the organization's leadership is aware of any existing laws, ordinances, and/or authorities of health officials. (Master Level Data) 🔄 Continuity Team 🏼 🎒 11. Sort Members Name / Title / Contact Continuity Team Role Serves as the Continuity Team Chief and is responsible for deciding if and when to relocate operations to an alternate facility. Edit Serves as the primary point of contact for Facility Management; duties could include assistance in selecting alternate facilities and coordinating relocation efforts of furniture: office equipment, and IT related requirements. oope Owner W: 615-999-4837 C: 423-658-3221 Edit n: 21.03.164 Copyright @ 2004 - 2021, BOLDplanning, Inc., All rights reserved.

2. Click on the "Assign New Member" button near the middle of the screen.

Figure: Assign New Member

- 3. Use the Team drop-down box to find the planning team and click on it.
- 4. Select and click on your name in the Member drop-down box.

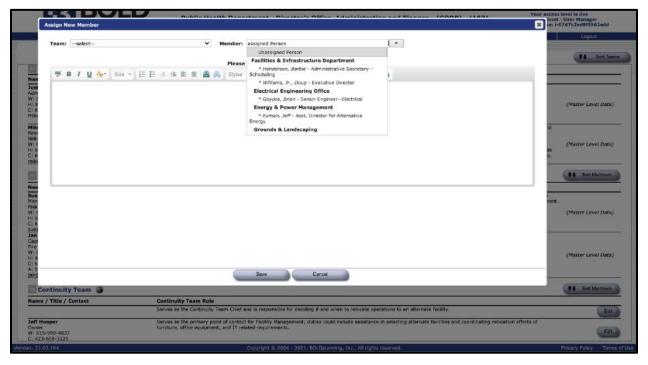


Figure: Member

- 5. Read the responsibilities for planning team and check the box(es) that apply to your responsibilities on the planning team. (As you do this, you will notice that green check marks appear. These check marks will help you keep track of which responsibilities have been covered.)
- 6. Use the free-form data input box to write any additional responsibilities you will handle.
- 7. Click "Save."

Check to see that your name is listed as a member of the planning team, and that the correct responsibilities are listed for you.

	Team							*	memb	LSIE	r, Sandra -	monager				*										
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Figure: Assigning New Team Member

Assigning Other Members to the Planning Team

- 1. Click on the "Teams" button from the Main Menu.
- 2. Click on the "Assign New Member" button near the middle of the screen.
- 3. Use the Team drop-down box to find the planning team and click on it.
- 4. Select and click on the appropriate name in the Members drop-down box.
- 5. Read the responsibilities for planning team and check the box(es) that apply to this person's responsibilities on the planning team. (You will notice that green check marks already appear by the responsibilities you are handling.)
- 6. Use the free-form data input box to write any additional responsibilities this person will handle.

- 7. Click "Save."
- 8. Check to see that the contact is listed as a member of the planning team, and that the correct responsibilities are listed for him or her.
- 9. Repeat steps 2 through 8 until all planning team members have been assigned and all listed responsibilities have a green check mark beside them.

Assigning Member to Other Teams

- 1. Click on the "Teams" button from the Main Menu.
- 2. Click on the "Assign New Member" button near the middle of the screen.
- 3. Use the Team drop-down box to find the appropriate team and click on it.
- 4. Select and click on the appropriate name in the Member drop-down box.
- 5. Read the responsibilities for the team and check the box(es) that apply to this person's responsibilities.
- 6. Use the free-form data input box to write any additional responsibilities this person will handle.

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Figure: Teams/Main Menu



Figure: Assign New Member

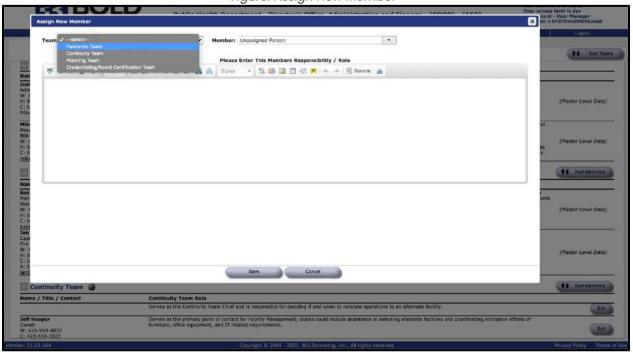


Figure: Assigning Members to a Team

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Figure: Assigning Team Member Roles/Responsibilities

Click "Save."

- 7. Check to see that the contact is listed as a member of the team, and that the correct responsibilities are listed for him or her.
- 8. Repeat steps 2 through 8 until all team members have been assigned and all listed responsibilities have a green check mark beside them.

Create, Edit, or Delete a New Team

Planning and continuity teams are critical to the success of your continuity program; however, you may need additional teams to oversee various functions that fall outside the responsibilities of those required teams. Follow the steps below to create additional teams:

- 1. From the Main Menu, navigate to the Teams section.
- 2. Select the "Add/Edit Team" button.
- 3. Select "Add New Team" from the Choose Team dropdown.
- 4. Enter the team's name into the Team Name field.
- 5. Enter a description of the team in the text box. Be sure to include the mission of the team and examples of member roles/responsibilities.
- 6. Click "Save" to save your work.
- 7. Select the "Assign New Member" button.
- 8. Choose the new team from the Choose Team dropdown.
- 9. Choose a member to assign to the team from the Member dropdown.

10. Enter the role/responsibility assigned to the person you are adding to the team.

Assign New Member		
Team: Enter Team Name Here	Member: Robertson, Chase - Deputy Administrator *	
	Please Enter This Members Responsibility / Role	
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Enter the role / responsibility of the person	you are adding to the team.	
	,	
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Figure: Adding a New Team

Edit a Team Member's Responsibilities

- 1. Click on the "Edit" button to the right of a person's listed responsibilities.
- 2. Check or uncheck the boxes for the listed responsibilities or use the free-form data input box.
- 3. Click "Save."

Delete a Team Member from a Team

- 1. Click on the "Edit" button to the right of a person's listed responsibilities.
- 2. Click on the "Delete" button.

Change the Order in Which Team Members Are Listed

- 1. Click on the "Sort Members" button to the right of the team's name.
- 2. Place your cursor over the member you wish to re-sort.
- 3. When the crossed arrows appear, hold down the left cursor button and drag the member into the correct order in the team list.
- 4. Click "Save."

Sample Reports for Teams

Following is a sample report for the Teams section of a plan. Note that the report presents all the available contact information from the contacts database for each contact. Ideally, there will be at least two ways to contact each person listed on the Teams report.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

In preparation of potential continuity events, relocation team members are responsible for attending continuity meetings as scheduled, keeping the relocation team chief apprised of continuity matters, reviewing and updating organization's essential functions annually, developing notification cascades for key staff and/or division personnel, participating in continuity training and exercises, and developing a plan and methodology for off-site storage of data to include essential resources and databases.

During a continuity event, members of the relocation team are responsible for relocating to the designated alternate facility in a timely manner and re-establishing and recovering the operations of the organization's essential functions as identified in Annex C.

Team Member	Team Responsibility/Role
Billy Simms - Commissioner	Serves as the continuity team chief and is
Monroe County Human Resources	responsible for deciding if and when to
Benefits	relocate operations to an alternate facility.
Work: 338-447-2294	
Work Email: bsimms@commiss.com	
John Smith - Deputy Fire Chief	Serves as the primary point of contact for
Monroe County Fire Dept.	facility IT-related requirements.
Fire and Rescue	
Work: 615-111-111_	
Home: 615-333-3333	
Work Email: jsmith@monroe.org	
Personal Email: jsmith@yahoo.com	
Jeff Wilson - Response	Responsible for coordinating and managing
Coordinator	financial related issues during continuity
Monroe County Fire Dept.	events including purchases, petty cash, and
Ambulance Services	reimbursements.

Continuity Team Members - City of Springfield - Department of Public Works -Administration - Human Resources

Work: 312-743-1190 Work Email: bwagner@monroe.gov	
Bob Reynolds - Facility	Serves as the primary point of contact for
Coordinator	facility management; duties could include
Monroe Police Dept.	assistance in selecting alternate facilities
Operations	and coordinating relocation efforts of
Work: 321-543-6543	furniture, office equipment, and IT-related
Home: 566-788-7654	requirements.
Work Email: bob@monroe.gov	
Personal Email: bob@gmail.com	

Primary Facilities

Your primary facilities are the locations that your organization uses and manages on a regular basis. This includes all physical locations where your staff works daily as well as all locations for which your organization is responsible. Include all your organization's facilities, even locations that may not have any staff. Only add facilities where your organization operates, not locations that it services.

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*Data Center (45 staff) 1456 East End Road - Springfo	eld_TN 34589 g - Deputy Health Officer (w: 615-48	1-9861. c: 615-931-9872. marie@w	ork.com)	Aussign Alternates Ed
Choice Alternate F			Include and the second s	Relocating Staff
1st Alternate *Public Heal	th Department Headquarters - 2500	Charlotte Avenue - Nashville, TN 372	209	8
2nd Alternate *Southside I	WIC Nutrition Center - 3718 Nolensvi	lle Pike - Nashville, TN 37211		30
2500 Charlotte Avenue - Nash	ment Headquarters (34 staff) ville. TN 37209 er - Deputy Health Officer (w: 615-5		work.com)	Assign Alternates Ed
Choice Alternate F	acility			Relocating
1st Alternate *Data Cente	r - 1456 East End Road - Springfield,	TN 34589		13
2nd Alternate *Southside I	WIC Nutrition Center - 3718 Nolensvi	lle Pike - Nashville, TN 37211		22
Alternate Facility				
•Data Center 1456 East End Road - Springfield. Th acility Manager: <u>Marie Davis</u> - De	1 34589 puty Health Officer (w: 615-481-986	1, c: 615-931-9872, <u>marie@work.co</u>	2)	Ē
*Public Health Department 2500 Charlotte Avenue - Nashville, T Facility Manager: Sandra Ester - D		32, c: 615-851-0139, sandra@work.r	com)	En
ito:marie@work.com			04 - 2021, BOLDplanning, Inc., All rights reserved.	Privacy Policy Terms

Figure: Primary Facilities

Important: Several buildings may have already been added to the system for you to import. To make sure we include the buildings using consistent names, click on the "Import Facilities" button first, to see which buildings have already been added to the enterprise system before you add any for your department.

ъ	planning	9 Public He	alth Department - Emergen	cy Preparedness	and Response - (COOP) - (154)	My Account - Us Instance: i-07d	
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Facilities	<u> </u>	Add New Facility Import Facility	es Backport Fa	cilities Import From E	xcel		
Search / Filter:		All				_		
Primary Facility								
	load - Springfield, TN 34589	th Officer (w: 615-481-9861	, c: 615-931-9872, <u>marie@work.com</u>)				Assig	Alternates
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Public Health Department	Headquarters - 2500 Charlot	te Avenue - Nashville, TN 37209					8
2nd Alternate	*Southside WIC Nutrition C	enter - 3718 Nolensville Pike	- Nashville, TN 37211					30
2500 Charlotte /	Ith Department Head Avenue - Nashville, TN 37209 1: Sandra Ester - Deputy Hea		2, c: 615-851-0139, sandra@work.com	9			Assign	Atternates
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Data Center - 1456 East E	nd Road - Springfield, TN 34	589					13
2nd Alternate	*Southside WIC Nutrition Co	ienter - 3718 Nolensville Pike	Nashville, TN 37211					22
Alternate Facilit	y							
	<u>Springfield, TN 34589</u> Ie Davis - Deputy Health Offi	cer (w: 615-481-9861, c: 61	5-931-9872, <u>marie@work.com</u>)					Edit
2500 Charlotte Avenue	Pepartment Headquart - Neshville, TN 37209 dra Ester - Deputy Health Of		15-851-0139, sandra@work.com)					Edit
to:marle@work.com		10	Convright #) 2004 - 2021		(Protocol and Protocol and Prot			vacy Policy Terms of

Figure: Importing Facilities

Buildings entered on the enterprise level are available for your organization's plans by importing them into your department plan.

Adding a Primary Facility Using Support

- 1. Start by clicking the "Facilities" button on the Main Menu task button list.
- 2. If you see an "Import Facilities" button, click on it.
- 3. Check the box next to any facilities listed that are primary facilities for your organization.
- 4. Click on the "Import Facilities" button.

C,	Import Facilities	Your scess lavel is dev My Account - User Manager Instance: 1-07.67772e395562edd
Main Menu	Public Health Laboratory - 1015 East Trinky Lane - Nashville, TN 37216 Kormary Facility Vulnerable Needs and Women and Childrens Center - 3321 Harding Pike - Nashville, TN	desinistration Lagebut
Search / Filter: Primary Facility Bata Cente 1456 East End R		Asstor Alternation
Choice		Relocating
2nd Alternate		30
Public Hea 2500 Charlotte / Facility Manager		Assign Attennities Ent
Choice		Relocating Staff
1st Alternate		13
2nd Alternate		
Alternate Facility	Import Facilities Cancel	
*Data Center 1456 East End Road - S Facility Manager: Mari	sprinsfeld, <u>711 34589</u> I le Davis - Deputy Health Officer (w. 615-481-9661, c. 615-931-9872, <u>mate@ws/k.com</u>)	-
2500 Charlotte Avenue	Department Headquarters a Neabulle, TN 37209 dra Ester - Deputy Health Officer (w. 615-581-4032, c. 615-851-0139, sandra@wark.com)	
Vention: 21.03.164	Copyright @ 2604 - 2023, 80:L0planning, foc., All rights reserved.	Privacy Policy. Terms of Use

Figure: Importing Primary Facilities

- 5. **Important:** This import process can take a few seconds to complete. <u>Do not</u> click twice.
- 6. If none of the facilities listed are used by your organization, just click "Close."
- 7. Confirm that the correct primary facilities are now in your list.

8. Click the "Edit" button next to each imported facility and complete the data entry.

 _D	plannin	g Public He	ealth Department - Emerge	ency Preparednes	s and Response -	(COOP) - (154)		evel is dev User Manager 7d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Massagas	Administration	Logout
	Facilities	9 • •	Add New Facility Import Fa	aclities Backport Fi	scillies Import From	m Excel		
Search / Filter:		All 🗸						
Primary Facility	y .							
1456 East End	i ĉer (45 staff) I Road - Springfield, TN 34589 ger: Marie Davis - Deputy Hea		1, c: 615-931-9872, <u>marie@work.co</u> r	m).			Ass	ign Alternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Public Health Department	nt Headquarters - 2500 Charlo	tte Avenue - Nashville, TN 37209					8
2nd Alternate	*Southside WIC Nutrition (Center - 3718 Nolensville Pike	a - Nashville, TN 37211					30
2500 Charlotte	ealth Department Head e Avenue - Nashville, TN 37209 ger: <u>Sandra Ester</u> - Deputy He	99	32, c: 615-851-0139, <u>sandra@work.c</u>	<u>com)</u>			Assi	ign Atternates
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Data Center - 1456 East	t End Road - Springfield, TN 34	1589					13
2nd Alternate	*Southside WIC Nutrition (Genter - 3718 Nolensville Pike	e - Nashville, TN 37211					22
Alternate Facili	ity							
	 Springfield, TN 34589 arie Davis - Deputy Health Of 	Officer (w: 615-481-9861, c: 6	15-931-9872, marie@work.com)					Edit
2500 Charlotte Avenu	Department Headquar		615-851-0139, <u>sandra@work.com</u>)					Edit
nalito-marle@work.com				021 BOI Delansing Tec -	The second s			Brivacy Policy Terms of Lise

Figure: Editing Primary Facilities

ប	planning	Public	Health Department - Er	h Department - Emergency Preparedness and Response - (COOP)				Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f5962add		
Main Menu	General Info	Contacts	Manage Your Plan >	File Archive	Reports	M	lessages	Administration	Logout	
	Facilities	a								
			Facility Type: Facility Name:	Primary Facility, Alternate Data Center	Facility					
			Address: View Map	1456 East End Road						
			City: State	Springfield Tennessee 👻						
			Zipcode: # of Your Staff at Facility:	34589		1.00				
			Facility Manager :	Davis, Marie - Deputy Heal	th Officer					
			Facility Comments:							
			Save	Cancel	Jelete Facility Re	sources				

Figure: Save – Facilities

- 9. Fill in the total number of employees at this facility.
- 10. Fill in the facility manager for your facility.
- Add any comments that may be pertinent to this facility with special focus on a description of the physical space that you utilize. Details about office space, specialized work areas, laboratories, warehouses, etc. are important for considerations related to relocation (see alternate facilities section).

12. Click the "Facility Resources" button next to the "Delete" button and complete the data entry of all existing resources at that location. Note that you have the option to import resources from any existing facility list.

	ט	blanning	Public	Health Department - E	mergency Preparedn	ess and Response	- (COOP) - (154)	Your access My Account Instance: i-	s level is dev t - User Manager -07d7b2ed915962edd
	Main Menu	General Info	Contacts	Manage Your Plan ×	File Archive	Reports		Messages	Administration	Logout
-	1	Facilities	99							
				Facility Type: Facility Name: Address: View Map	Primary Facility, Alternate Fa Data Center 1456 East End Road	cility				
				City: State Zipcode: # of Your Staff at Facility: Facility Manager : Facility Comments:	Springfield Tennessee ▼ 34589 45 Davis, Marie - Deputy Health ♥ B I 및 An* E					
				Save	Cancel De	ele Facility Re	sources			

Figure: Facility Resources

U	_	isources	Dable Health Dee	adarrant Processo		dense and passes troop	IN) (124)	Your access le My Account - L	vel is dev leer Manager 17b2ed915562edd
Main Mena	Qty 1	Chair	Description	Type Furniture	Y	Disposition Pre-Positioned V	-	dministration	Lagout
	1	Desk		Furniture	~	Pre-Positioned V	×		
				_					
			Save	Cancel		ert Resources			
Version: 21.03.164				Copyright @ 2004 - 202	1, BOLD planning	2, Inc., All rights reserved.		Pi	ivacy Policy Terms of Use

Figure: Adding new Facility Resources

- 13. Make sure to click the green plus sign to add the resource to the list.
- 14. When you are finished entering the data, click "Save."

15. Check to see that the correct information is displayed for your primary facility.

Adding a Primary Facility Without Using Import

Once you have determined that the building you want to add is not already loaded into the system, you will want to add the building without using Import.

- 1. Click the "Facilities" button on the Main Menu.
- 2. Click on the "Add New Facility" button.

D	plannin	g Public He	ealth Department - Emergency Preparedness and Response - (COOP) - (154)	Your access level is dev My Account - User Manager Instance: I-07d7b2ed9f5962edd
Main Menu	General Info	Contacts	Managu Your Plan File Archive Reports Messages Madd New Facility Import Facilities Beckport Facilities Import From Excel	Administration Logout
Search / Filter:		All		
Primary Facility	v			
	Road - Springfield, TN 34589		1, c: 615-931-9872, <u>marie@work.com</u>)	Assign Alternates Edit
Choice	Alternate Facility			Relocating Staff
1st Alternate	*Public Health Departmen	nt Headquarters - 2500 Charlo	tte Avenue - Nashville, TN 37209	8
2nd Alternate	*Southside WIC Nutrition	Center - 3718 Nolensville Pik	e - Nashville, TN 37211	30
2500 Charlotte	alth Department Hea Avenue - Nashville, TN 3720 er: Sandra Ester - Deputy H	9	32, c: 615-851-0139, <u>sandra@work.com</u>)	Assign Atternates Edit
Choice	Alternate Facility			Relocating Staff
1st Alternate	*Data Center - 1456 East	End Road - Springfield, TN 3-	1589	13
2nd Alternate	*Southside WIC Nutrition	Center - 3718 Nolensville Pik	e - Nashville, TN 37211	22
Alternate Facili	ity			
	<u>- Springfield, TN 34589</u> arie Davis - Deputy Health C	officer (w: 615-481-9861, c: 6	15-931-9872, <u>marie@work.com</u>)	Edt
2500 Charlotte Avenu	Department Headqua uc - Nashvile, TN 37209 Indra Ester - Deputy Health		615-851-0139, sandize#work.com)	Ecit
ailto:marie@work.com			Copyright @ 2004 - 2021, BOLDplanning, Inc., All rights reserved.	Privacy Policy Terms of Use

Figure: Adding New Facility Without Import

planning	Public Health Department - E	mergency Preparedness	P) - (154)	Your access My Account Instance: I-0	level is dev - User Manager 17d7b2ed915962edd	
Main Menu General Info Facilities	Contacts Manage Your Plan	 File Archive 	Reports	Messages	Administration	Logout
Facilities	Facility Type: Facility Name: Address:	Searce Marie				
	City: State Zipcode: # of Your Staff at Pacility: Facility Manager :	Select V Unassigned Person		1		
	Facility Comments:	₩ B I U A+ E ↔	🤿 🖪 Source 🚡			
	Save	Canad	Faolity Resources			
Version: 21.03.164	Copyright © 3	004 - 2021, BOLDplanning, Inc., A	Il rights reserved.			Privacy Policy Terms of Use

Figure: Adding New Facility Information

- 3. In the appropriate boxes, fill in the name and address of this facility.
- 4. Fill in the total number of employees at this facility.
- 5. Add any comments that may be pertinent to this facility with special focus on a description of the physical space that you utilize. Details about office space, specialized work areas, laboratories, warehouses, etc. are important for considerations related to relocation (see alternate facilities section).
- 6. Click the "Facility Resources" button next to the "Delete" button and complete the data entry of all existing resources at that location. Note that you have the option to import resources from any existing facility list.
- 7. Make sure to click the green plus sign to add the resource to the list.
- 8. When you are finished entering the data, click "Save."
- 9. Check to see that the correct information is displayed for your primary facility.
- 10. Repeat steps 2 through 9 for any additional primary facilities.

Editing or Deleting a Primary Facility

- 1. Start by clicking the "Facilities" button on the Main Menu.
- 2. Click on the "Edit" button to the right of the facility you wish to edit or delete.

ъ	planning	Public H	ealth Department - Emerge	ency Preparedness	and Response - (COOP) - (154)	Your access My Account Instance: i-0	evel is dev User Manager 7d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Facilities	9 9	Add New Facility	clittes Backcort Facil	ities Import From E			
Search / Filter:		All	Add New Facility Import Fa	callies Backport Facility	inter Home	308		
Primary Facility								
	Road - Springfield, TN 34589	h Officer (w: 615-481-986	1, c: 615-931-9872, <u>marie@work.co</u> n	D)			As	ign Alternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Public Health Department h	eadquarters - 2500 Charle	otte Avenue - Nashville, TN 37209					8
2nd Alternate	*Southside WIC Nutrition Ce	nter - 3718 Nolensville Pil	e - Nashville, TN 37211					30
2500 Charlotte	alth Department Headq Avenue - Nashville, TN 37209 hr: Sandra Ester - Deputy Heal	000 - X - 200 - K	32, c: 615-851-0139, <u>sandragtwork.c</u>	iom)			As	ign Alternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Data Center - 1456 East En	d Road - Springfield, TN 3	4589					13
2nd Alternate	*Southside WIC Nutrition Ce	nter - 3718 Nolensville Pi	e - Nashville, TN 37211					22
Alternate Facilit	ty							
	<u>Springfield, TN 34589</u> rie Davis - Deputy Health Offic	ær (w: 615-481-9861, c: :	515-931-9872, <u>marie@work.com</u>)					Edit
2500 Charlotte Avenu	Department Headquarte c - Neshville, TN 37209 Idra Ester - Deputy Health Off		615-851-0139, <u>sandra@work.com</u>)					Eat
alito:marie@work.com			Copyright @ 2004 - 20	021, BOLDplanning, Inc., All	rights reserved.			Privacy Policy Terms of U

Figure: Editing/Deleting Facility

ឋ	planning	Public H	Public Health Department - Emergency Preparedness and Response - (COOI					Your access My Account Instance: i-0	level is dev User Manager 7d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan *	File Archive	Reports		Messages	Administration	Logout
	Facilities	i i i i i i i i i i i i i i i i i i i							
		,	acility Type:	Primary Facility, Alternate Facil	tv				
			이 같은 것은 것은 것은 것은 것이 있는 것이 없다.	Data Center	7				
			ddress:	1456 East End Road					
			liew Map			1			
		a c	ity:	Springfield					
			itate	Tennessee Y					
		2	lipcode:	34589					
		4		45					
			acility Manager :	Davis, Marie - Deputy Health O	flicer	380			
				≪ в / <u>⊍</u> Ан• ⊟ «	A A Source				
			acility Comments:						
					_				
			Save	Cancel Delet	Facility Re				
				Curron	- acred the		· · · · ·		

3. If you simply wish to remove this facility from your list, click "Delete."

Figure: Deleting a Facility

- 4. If you want to change any of the information about this facility, just update any of the displayed data.
- 5. Click "Save."
- 6 Check to see that the correct information is now displayed for your primary facility.

Adding or Changing a Facility Manager

- 1. To add or change the facility manager for a listed facility, click on the "Edit Facility" button to the right of the listed facility.
- 2. Click on the Facility Manager drop-down menu.

G	planning	Public Health Department - Emergency Preparedness and Response - (COOP) - (154)						y Account - User Manager Istance: i-07d7b2ed9f5962edd				
Main Menu	General Info	Contacts	Manage Your P	lan »	File Archive	N.	Reports	Ň	Messages	Administrati	20 PR	Logout
	Facilities	0	Facility Type: Facility Name: Address: City: State Zipcode:	Select	* *							
			# of Your Staff at Facilit Facility Manager : Unc # 8 * 6 * 6 Facility Commen * 7	Unassig assigned Perso tor's Office entan, Harakt ourne, Jim - C awis, Marie - I ones, Lauren inley, James	ined Person on 2 - Deputy Health (Deputy Administra Deputy Health Off - Deputy Administra Deputy Administra rity Health and I	tor icer rator - Dental rator - Mental	Health Health	(w)				
			Emer	gency Prepa	Deputy Health Of Incidness and Re Cancel	sponse	ty Resources					
21.03.164			Promotobe	@ 2004 - 20 2	21, BOLDplanning.	Inc. All date						ivacy Policy Terr

Figure: To Add/Change Facility Manager

- 3. Find the correct name in the contact search results and click on it.
 - a. If a facility manager cannot be found in the drop-down list, go to Contacts, and add this person.
- 4. Click "Save."
- 5. Check to see that the correct information is now displayed for your primary facility.

Alternate Facilities

Overview

Your alternate facilities are the locations that your organization could move to and use as alternate sites if the primary sites become unavailable for use. You may be able to designate specific alternates for each primary location, but you may also need to leave some things "to be determined." Fill in as much information as possible.

Adding an Alternate Facility Using Import

1. Start by clicking the "Facilities" button on the Main Menu.

	Main Menu Department of Information Technology - CC	OP - (147)	•		Welcome, Key Your username Your access le My Account - U Instances - 041	rise Kausto.
Man Menu Pan + 🚱	Actions + People +	Places +	Things +	Vior Pan	Administration	Logou!
Plan General Inte Actions Essertial Functories People	File Archive View	Ren BOLD Jienning.com we also a Thring Start. Using the battens to D For security purposes, For comments or guess		ized on-line plenning environme h each section of your CODP plu finished with your session.	our Costinuity of Operations Plan (ent, that not only produces a hand c an.	
Contexts. Teams. Devolutions Places Facilities Security and Access	Orders of Succession Delegations	of Authority				
Things Communications Eisential Bezards/Resources TIE / Pan Membrance References / Automites	Aiert Notification Procedures	Xts				

Figure: Main Menu – Facilities

2. Click on the "Import Facilities" button.

Ъ	planning	g Public He	ealth Department - Emerg	gency Preparedne	ss and Response - (COOP) - (154)	Your access My Account Instance: I-	level is dev - User Manager 07d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Facilities	90						
			Add New Facility Import F	aclines Backport I	Facilities Import From I	Excel		
Search / Filter:		All 🗸						
Primary Facility								
	Road - Springfield, TN 34589	ith Officer (w: 615-481-986	1, c: 615-931-9872, <u>marie@work.co</u>	um)			As	sign Alternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Public Health Department	headquarters - 2500 Charlo	tte Avenue - Nashville, TN 37209					8
2nd Alternate	*Southside WIC Nutrition C	enter - 3718 Nolensville Pik	e - Nashville, TN 37211					30
2500 Charlotte	Avenue - Nashville, TN 37209 r: Sandra Ester - Deputy He		32, c: 615-851-0139, <u>sandra@work</u>	.com)			As	sign Atternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Data Center - 1456 East E	nd Road - Springfield, TN 34	\$589					13
2nd Alternate	*Southside WIC Nutrition C	enter - 3718 Nolensville Piki	e - Nashville, TN 37211					22
Alternate Facilit	У							
Data Center								
	Springfield, TN 34589 rie Davis - Deputy Health Offi	icer (w: 615-481-9861, c: 6	15-931-9872, marie@work.com)					Edit
	Department Headquar	ters						(
	e - Nashville, TN 37209 Idra Ester - Deputy Health Of	fficer (w: 615-581-4032, c:	615-851-0139, sandra@work.com)					Edit
to:marle@work.com			Copyright #0 2004 - 2	2021, BOLDplanning, Inc.,	All rights reserved.			Privacy Policy Terms of

Figure: Importing Facilities

3. Checkmark the boxes to the left for any facilities listed that could be alternate facilities for your organization.

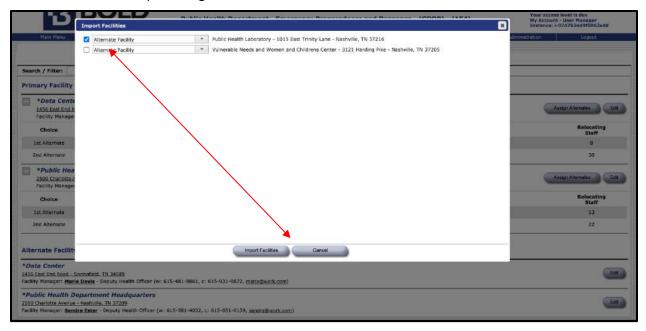


Figure: Importing Alternate Facilities

Important: this import process will often take a few seconds to complete. Do not click twice.

- 4. If none of the facilities listed are used by your organization, click on the "Close" button.
- 5. Confirm that the correct alternate facilities are now in your list.

 \wedge

6. Click the "Edit Facility" button next to each imported facility to complete the data entry.

	planning	Public He	alth Department - Emerge	ncy Preparedness	and Response - (COOP) - (154)	Your access My Account Instance: i-	- User Manager 07d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Facilities	00	Add New Facility Import Faci	lities Backport Faci	Ities Import From E	xcel		
Search / Filter:		All 🗸						
Primary Facility								
	load - Springfield, TN 34589	h Officer (w: 615-481-986)	, c: 615-931-9872, <u>marie@work.com</u>	E.			As	sign Alternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Public Health Department h	leadquarters - 2500 Charlot	te Avenue - Nashville, TN 37209					8
2nd Alternate	*Southside WIC Nutrition Ce	nter - 3718 Nolensville Pike	- Nashville, TN 37211					30
2500 Charlotte /	Avenue - Nashville. TN 37209 r: Sandra Ester - Deputy Heal		12, c: 615-851-0139, <u>sandra@work.co</u>	m)			As	sign Alternates
Choice	Alternate Facility							Relocating
1st Alternate	*Data Center - 1456 East En	d Road - Springfield, TN 34	589					13
2nd Alternate	*Southside WIC Nutrition Ce	inter - 3718 Nolensville Pike	- Nashville, TN 37211					22
Alternate Facility	у							
*Data Center 1456 East End Road - : facility Manager: Mar		cer (w: 615-481-9861, c: 6	15-931-9872, marie@work.com)					Edit
2500 Charlotte Avenue	Department Headquart - Neshvile, TN 37209 dra Ester - Deputy Health Off		515-851-0139, <u>sandra@work.com</u>)					Eat
to:marle@work.com		36	Copyright #) 2004 - 202	1, BOLDplanning, Inc., All	rights reserved			Privacy Policy Terms o

Figure: Editing Alternate Facilities

7. To assign an alternate facility to a specific primary facility, click on the "Assign Alternates" button (beside the "Edit" button) of the primary facility you want to assign alternate facilities for.

Ð	plannin	Public He	alth Department - Emerg	ency Preparednes	s and Response -	(COOP) - (154)		evel is dev User Manager 7d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Facilities	🥥 🗶 🔜						
			Add New Facility Import Fa	clittes Backport Fa	cilities Import From	n Excel		
Search / Filter:		All 🗸						
Primary Facility								
1456 East End	ter (45 staff) Road - Springfield, TN 34589 er: <u>Marie Davis</u> - Deputy Hea	aith Officer (w: 615-481-986)	, c: 615-931-9872, <u>marie@work.co</u>	n)			Ass	ign Alternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Public Health Department	hieadquarters - 2500 Charlot	te Avenue - Nashville, TN 37209					8
2nd Alternate	*Southside WIC Nutrition (Center - 3718 Nolensville Pike	- Nashville, TN 37211					30
2500 Charlotte	alth Department Head Avenue - Nashville, TN 37209 er: Sandra Ester - Deputy He	Carrier and the second second	12, c: 615-851-0139, <u>sandra@work.</u>	com)			Assi	ign Alternates Edit
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Data Center - 1456 East I	End Road - Springfield, TN 34	589					13
2nd Alternate	*Southside WIC Nutrition (Center - 3718 Nolensville Pike	- Nashville, TN 37211					22
Alternate Facili	ty							
	- <u>Springfield, TN 34589</u> rrie Davis - Deputy Health Of	ficer (w: 615-481-9861, c: 6	15-931-9872, marie@work.com)					Edit
2500 Charlotte Aven	Department Headquar e - Nashville, TN 37209 ndra Ester - Deputy Health C		515-851-0139, <u>sandra@work.com</u>)					Edit
alito:marle@work.com			Convright # 2004 - 2	221, BOLDplanning, Inc., A	I rights reserved.			Privacy Policy Terms of Us

Figure: Assigning Alternate Facilities to Primary Facilities

8. Use the drop-down menus to fill in the correct information for each alternate. First, choose the first alternate (left drop-down menu), along with choosing the alternate facility you wish to assign as the first alternate (middle drop-down menu). After, enter how many staff will relocate to this alternate facility.

Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Facilities	00						
			Add New Facility Import	Facilities Backport Fa	cillies Import From Ex	col		
arch / Filter:		All 🗸						
imary Facility								
*Data Cent	2# (45 staff)						-	
	oad - Springfield, TN 34589 :: Marie Davis - Deputy Healti	h Officer (w: 615-481-9861,	c: 615-931-9872, marie@work.c	com)			As	isign Alternates
Choice	Alternate Facility							Relocating
Select ¥							*	Starr
1st Alternate 🗸	*Public Health Department H	Aeadquarters - 2500 Charlott	e Avenue - Nashville, TN 37209)				8
2nd Alternate 🛩	*Southside WIC Nutrition Co	enter - 3718 Nolensville Pike	- Nashville, TN 37211					30
			Se	tve Cance	• • • • • • • • • • • • • • • • • • •			
*Public Hea	lth Department Headq	warters (34 staff)						
	Venue - Nashville, TN 37209 :: Sandra Ester - Deputy Heal	ith Officer (w: 615-581-4037	. c: 615-851-0139, sandra@word	k.com)			As	sign Allernates
Choice	Alternate Facility							Relocating Staff
1st Alternate	*Data Center - 1456 East En	d Road - Springfield, TN 345	89					13
2nd Alternate	*Southside WIC Nutrition Cel	nter - 3718 Nolensville Pike -	Nashville, TN 37211					22
Iternate Facilit	y							

Figure: Assigning Alternate Facilities to Primary Facilities Drop-Down Menus

9. To add a second and third alternate, click the green plus sign.

·B	BOLD	Facilities Public Health Department - Emergency I	Preparedness and Response - (CC	OP) - (154)	Welcome, Kayla McMahan. Your username is Kayla. Your access level is dev My Account - User Manager Instance: 1-07d7b2ed9f5962edd
Main Menu	General Info		File Archive Reports	Messages Administr	ation Logout
	Facilities	Add New Facility Import Facilities	Backport Facilities		
Search / Filter:		II 👻	<u> </u>		
Primary Facility					
	load - Springfield, TN 34589	er (w: 615-481-9861, c: 615-931-9872, <u>marie@work.com</u>)			Assign Alternates Edit
Choice	Alternate Facility				Relocating
Select ¥				*	
1st Alternate 💙	*Public Health Department Head	arters - 2500 Charlotte Avenue - Nashville, TN 37209			8 🗙
2nd Alternate 🛩	*Southside WIC Nutrition Center	3718 Nolensville Pike - Nashville, TN 37211		*	30 🗙
		Save	Cancel		
2500 Charlotte	Alth Department Headquar Avenue - Nashville, TN 37209 r: Sandra Ester - Deputy Health C	775 (34 staff) cer (w: 615-581-4032, c: 615-851-0139, <u>sandra@work.com</u>)			Assign Allernaliss Edit
Choice	Alternate Facility				Relocating Staff
1st Alternate	*Data Center - 1456 East End Ro	i - Springfield, TN 34589			13
2nd Alternate	*Southside WIC Nutrition Center	3718 Nolensville Pike - Nashville, TN 37211			22
Alternate Facilit	у				
	Sprinafield. <u>IN 34589</u> rie Davis - Deputy Health Officer (615-481-9861, c: 615-931-9872, marie@work.com)			Edit
rsion: 21.03.164		Copyright © 2004 - 2021, 80	LDplanning, Inc., All rights reserved.		Privacy Policy. Terms of U

Figure: Assigning Alternate Facilities to Primary Facilities Using Green Plus Sign

- After assigning a 1st, 2nd, and 3rd alternate facility for a primary facility, and identifying the number of staff relocating to each alternate facility, click "Save."
- 11. To edit alternate facility information, click the "Edit" button for the alternate facility you wish to edit.
- 12. Add any comments that may be pertinent to this facility with special focus on the facility's limitations (For example: "Can't access 6th floor").
- 13. Fill in the facility manager for your alternate facility.
- 14. Check to make sure this name now appears as the facility manager.

	ប	planning	Public He	Public Health Department - Emergency Preparedness and Response - (COOP) - (154)					Your acces My Accoun Instance:	is level is dev it - User Manager i-07d7b2ed915962edd
	Main Menu	General Info	Contacts	Manage Your Plan *	File Archive	1	Reports	Messages	Administration	Logout
		Facilities	i i i i i i i i i i i i i i i i i i i							
			Fa	cility Name:	Primary Facility, Alternate Data Center 1456 East End Road	Facility	×			
				ew Map	Paula all alla		1			
			Cit	25.2	Springfield Tennessee V					
					34589					
					45					
			Fa	cility Manager :	Davis, Marie - Deputy Heal	th Officer	.*.	3		
					≪ Β <i>Ι</i> <u>U</u> Α _{ι*} Ε	- +	Source 🚔			
1111			Fa	cility Comments:						
Ē				Save	Cancel	Delete	Facility Resources			

Adding Facility Resources

- 15. Click on the "Facility Resources" button to the right of the alternate facility.
- 16. Type a description of the resource and the quantity of needed the resource. Note that you can import resources from any existing facility list.
- 17. Use the Type drop-down box to select what kind of resource this is (computer hardware, furniture, etc.).
- 18. Use the Disposition drop-down box to select whether this resource will be prepositioned or transported.

-3	BOLD Edit Resources	Facilities			D) (454) <mark>8</mark>	Welcome, Kayla McMahan. Your osernano is Kayla. Your access level is dev Ny Account - User Manager Instance: I-076752e6975962add
Main Menu	Qty	Description	Туре	Disposition		dministration Logout
	1 Chair		Furniture 👻	Transported V	÷	
	1 Desk		Furniture 🗸	Transported 💙	×	Facility Resources Transported 1 - Desk - Furniture
		Save	Cancel	mport Resources	-	

Figure: Adding Resources

- 19. Make sure to click the green plus sign to add the resource to the list.
- 20. Click "Save."
- 21. Check to see that the correct information is displayed for your alternate and aligned with a primary facility.

Adding an Alternate Facility Without Using Import

1. Start by clicking the "Add New Facility" button at the top of the Facilities screen.

G	plannin	9 Public He	alth Department - Emergency Preparedness	and Response - ((COOP) - (154)	Your access lev My Account - U Instance: i-07d	
Main Menu	General Info	Contacts	Manage Your Plan * File Archive Add New Feeliny Import Facilities Beckport Fac	Reports	Messages	Administration	Logovit
Search / Filter:		All		-	_		
Primary Facility	/						
	Road - Springfield, TN 34589	aith Officer (w: 615-481-986)	, c: 615-931-9872, marie@work.com)			Assig	Alternates
Choice	Alternate Facility						Relocating Staff
1st Alternate	*Public Health Department	hieadquarters - 2500 Charlot	te Avenue - Nashville, TN 37209				8
2nd Alternate	*Southside WIC Nutrition C	Center - 3718 Nolensville Pike	- Nashville, TN 37211				30
2500 Charlotte	alth Department Head Avenue - Nashville, TN 37209 er: Sandra Ester - Deputy He	large a contra es	2, c: 615-851-0139, <u>sandra@work.com</u>)			Assig	Alternates Edit
Choice	Alternate Facility						Relocating Staff
1st Alternate	*Data Center - 1456 East E	End Road - Springfield, TN 34	589				13
2nd Alternate	*Southside WIC Nutrition C	Center - 3718 Nolensville Pike	Nashville, TN 37211				22
Alternate Facili	ty						
	- <u>Springfield, TN 34589</u> rie Davis - Deputy Health Off	ficer (w: 615-481-9861, c: 6	15-931-9872, <u>marlo@work.com</u>)				Eat
2500 Charlotte Avenu	Department Headquar us - Nashvills, TN 37209 Indra Ester - Deputy Health O		515-851-0139, <u>sandra@wsrk.com</u>)				Ecit
nailto:marie@work.com	n.		Copyright (2) 2004 - 2021, BOLDplanning, Inc., Al	I rights reserved.		Fri	vacy Policy Terms of Use

Figure: Adding Alternate Facilities Without Import

2. Enter the facility type from the drop-down box, the facility name, address, facility manager, facility comments, and facility resources.

Main Menu General Info Contacts Manage Your Plan * File Archive Reports Messages Admin	250200083N F 17200872
	inIstration Logout
Facilities 🥥 🕘	
Facility Type: ≤ anct Jappe Facility Name: Address: City: State Select ▼ Zipcode: # of Your Staff at Facility:	
Facility Manager : Unacsigned Person	
** B I U +* E + * B Source a Facility Comments:	
Save Cancel Fability Resources	
Version: 21.03.164 Copyright & 2004 - 2021, BOLDplanning, Inc., AB rights reserved.	Privacy Policy Terms of Use

Figure: Adding new Alternate Facility

3. Click "Save."

Sorting How the Alternate Facilities Are Listed

- 1. Click on the "Sort Facilities" button at the top of the list of all alternate facilities.
- 2. Place your cursor over the facility you wish to rearrange in the list.
- 3. When you see the crossed arrows, hold down the left cursor and drag the facility name to the new position.
- 4. Release the cursor when the facility is in the new correct position in the list.
- 5. Check to see if the alternate facilities list is now displayed correctly.

Sample Report for Alternate Facilities

Following is a sample report for the alternate facilities section of a plan.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

The following are alternate facilities identified for the City of Springfield – Department of Public Works - Contracts/Procurement:

Name / Location (Physical Address)	Resources Required at Alternate Facility
Monroe County Fire Headquarters - Primary Facility 270 Main Street South Monroe City, PA 15237 USA Staff Relocating: 25 out of 36 Alternate Facility (1st Choice)	Transported 100 - Boxes and Labels - Office Supplies 1 - Projectors - Computer Hardware 3 - Copy Machines - Computer Hardware 4 - Laptops - Computer Hardware 4 - Telephones - Communications 12 - Satellite Phones - Communications
Williams Complex 2100 Kings Highway South Monroeville, PA 15101	 12 - Salence - Communications 12 - Fax machines - Communications 12 - Phones - Communications 12 - Phones - Communications
<u>Facility Manager</u> . Paul Rogers w: 344-544-5544	Pre-Positioned 1 - Shipping Machine - Office Supplies 12 - Desks / Chairs - <i>Furniture</i> 2 - Printers - <i>Computer Hardware</i>
Monroe County Fire Headquarters - Primary Facility 270 Main Street South Monroe City, PA 15237 USA Staff Relocating: - out of 36	Transported 12 - Desks - Furniture 4 - Main Hook Ladders - Emergency Equipment 3 - Generators - Emergency Equipment 3 - Copy Machines (COLOR) - Computer Hardware 10 - Desktop/Laptop Computers - Computer Hardware
Alternate Facility (2nd Choice)	 6 - Walkie Talkies - Communications 1 - VHF Base Station USMS & FBI Frequencies - Communications
Wexford Complex 1220 Greeley Street Monroe, FL 45245	5 - Satellite Phones - Communications 1 - Copy/Fax Machine - Communications 14 - Phones - Communications
<u>Facility Manager</u> . Fran Wills w: 615-334-9090	Pre-Positioned 3 - File cabinets (Tall/3 Drawer) - <i>Furniture</i> 1 - Projector/Screen - <i>Computer Hardware</i> 222 - Phones - <i>Communications</i> 1 - Internet/Intranet Connection - <i>Communications</i>

* Identify resources needed to continue the operation of essential functions that have been pre-positioned at the alternate facility and those that will need to be transported to the facility. Examples of resources include office equipment/supplies, computers, chairs, tables, telephones, printers, and copiers.

Mission-Essential Functions

Overview

Mission-essential functions are the important activities that your organization performs to be considered operational. Each organization has a unique list of essential functions it is required to conduct. Use the Help button on the Mission Essential Functions screen to see additional details and examples.

It is recommended that you enter all your mission-essential functions into the first tier (priority level) and then decide on their relative tier and priority. It is much easier to then prioritize your mission-essential functions once you have them all listed.

Adding a Mission-Essential Function

1. Click on the "mission-essential function" button on the Main Menu.

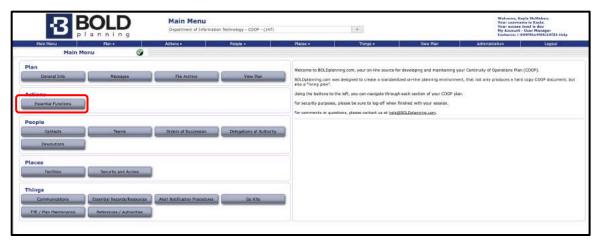


Figure: Main Menu

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

	planning		-0 CS					i-07d7b2ed9f5962edd
Ma	sin Menu General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Essential Functions	3 a	Add Nov	Tier Add New Fund	50n			View all by Tier (default)
Tier	1 - Functions to be performed, gi	ven a One Day disruption	on. (Highest priority to	lowest)			Import Function	s Sort Functions
Priority	Function			Department / Divi	sion			
#1	*Act as liaison between OEM and other coun	ity, state, and federal agencies"		Public Health Departs Response	ment - Emergency Prepare	idness and		EditWiew
#2	"Coordinate emergency services with NGO,	non-profit or religious organizati	ons."	Public Health Depart Response	ment - Emergency Prepare	edness and		EditWiew
#3	Document incident activities			Public Health Departs Response	ment - Emergency Prepare	idness and		Edit/View
84	Initiate response actions during emergencie	5		Public Health Departs Response	ment - Emergency Prepare	edness and		EditView
#5	Maintain 24 hour staff duty line.			Public Health Departs	ment - Emergency Prepare	dness and		Edit/View
1.1.1.1.1	2 - Functions to be performed, gi	ven a One Day - One W	eek disruption. (Highe		Sec. 1		Import Function	-
and the second second	Function		eek disruption. (Highe	st priority to lowest) Department / Divi	ision		Import Function	
#1	Function Coordinate with local meteorologists on dev	eloping weather.		st priority to lowest) Department / Divi Public Health Depart Response	ision ment - Emergency Prepare		import Function	s 11 Sort Functions
#1 #2	Punction Coordinate with local meteorologists on dev Menitor county facilities and public works fo	eloping weather. r irregularities in service delivery		st priority to lowest) Department / Divi Public Health Departs Response Public Health Departs Response	i sion ment - Emergency Prepare ment - Emergency Prepare	dness and	Import Function	a) (†† Sort Functions
riority #1	Function Coordinate with local meteorologists on dev	eloping weather. r irregularities in service delivery		st priority to lowest) Department / Divi Public Health Departs Response Public Health Departs Response	ision ment - Emergency Prepare	dness and	Import Function	s 11 Sort Functions
#1 #2	Punction Coordinate with local meteorologists on dev Menitor county facilities and public works fo	eloping weather. r innegularities in service delivery Ils		st priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response	i sion ment - Emergency Prepare ment - Emergency Prepare	edness and edness and	Import Function	Sort Functions Edit/View Edit/View
#1 #2 #3 #4	Function Coordinate with local meteorologists on dev Meritor county facilities and public works fo Receive incoming emergency notification ca	eloping weather. r irregularities in service delivery lis public information systems.		st priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response	ision ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare	edness and edness and	Import Function	CatView Edition
riority #1 #2 #3 #4	Function Coordinate with local meteorologists on dev Heritor county facilities and public works fo Receive incoming emergency notification ca Support PIO in notification mechanisms for	eloping weather. r irregularities in service delivery lis public information systems.		st priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response	ision ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare st)	edness and edness and		CORVer Edition Edition Edition
riority #1 #2 #3 #4 Tier	Function Coordinate with local meteorologists on dev Heritor county facilities and public works fo Receive incoming emergency notification ca Support PIO in notification mechanisms for 3 - Functions to be performed, gl	eloping weather. r irregularities in service delivery lis public information systems.		st priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response Public Health Depart Response hest priority to lowe: Department / Divi	ision ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare st)	idness and idness and idness and		CORVer Edition Edition Edition
riority #1 #2 #3 #4 Tier riority #1	Function Coordinate with local meteorologists on dev Heriter county facilities and public works fo Receive incoming emergency notification ca Support PIO in notification mechanisms for 3 - Functions to be performed, gi Function	eloping weather. r irregularities in service delivery lis public information systems.		st priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response hest priority to lowe: Department / Divi Public Health Depart Response	sion ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare st) ision	idness and idness and idness and indness and		EdeVice EdeVice EdeVice EdeVice
riority #1 #2 #3 #4 Tier	Punction Coordinate with local meteorologists on dev Horitor county facilities and public works fo Receive incoming emergency notification ca Support PIO in notification mechanisms for 3 - Functions to be performed, gi Function Conduct community-based training	eloping weather. r irregularities in service delivery lis public information systems.		st priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response hest priority to lowe: Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response Public Health Depart Response Public Health Depart Response	sion ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare st) ision ment - Emergency Prepare	idness and idness and idness and idness and idness and		Cative Cative

Figure: Add New Function

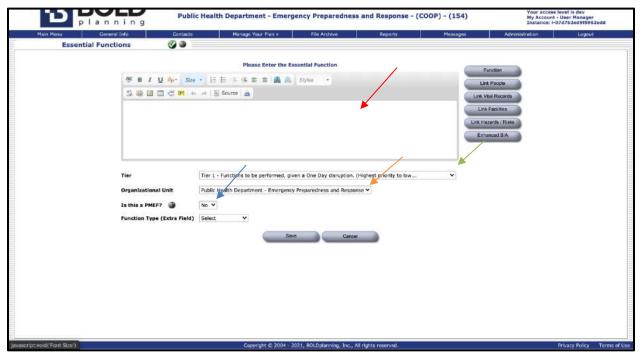


Figure: Entering the Essential Function

3. Use the Tier drop-down box to choose the appropriate tier for this mission essential function or leave them all the in Tier 1 until they are all inputted (see green arrow in figure above).

- 4. Use the first free-form data entry box to type in a description of the function (see red arrow in figure above).
- 5. Use the second drop-down box to identify the department required to carry out this mission essential function (see orange arrow in figure above).
- 6. Use the third drop-down box to identify if the mission essential function is a PMF (primary mission-essential function) (see blue arrow in figure 3). The definition of a PMEF is any function performed by your organization that meets one or more of the following criteria:
 - A function that is required to be completed by law/ordinance
 - A function that is required to be completed by directive/executive order
 - A function that is required to be completed based on critical health and/or life safety

When entering a function that is identified as a PMEF, be sure to explain the justification. The PMEF explanation should be documented in the mission-essential function field (e.g., what law, ordinance, and/or directive the function is required by or how the function impacts critical health and/or life safety.)

	Info Contacts	Manage Your Plan *	File Archive	Reports	Messages	Administration Logout
Essential Functi	ons 🔮 🖉 🖉					1
		Please Enter th	he Essential Function		Function	_//
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	5.00000000	🗃 🗐 Source 🛛 🚔			Link Vital Re	
					Unk Facil	
					Unk Hazards	/Risks
					Enhanced	BIA
	Tier	Tier 1 - Functions to be performed	d, given a One Day disruption. (Highest priority to low	v	
	Organizational Unit	Public Health Department - Emerg	gency Preparedness and Respon	se 🗸		
	Is this a PMEF? 🌘	No ¥				
	Function Type (Extra Field)	Select 💙				
			Save Cancel			
		_	tarte la carte			

Figure: Linking Essential Functions

7. Click on the "Link People" button to identify the contacts whose job it is to carry out this mission-essential function (see blue arrow in figure: linking essential functions).

BOLD Public P	lealth Department - Emergency Preparedness and Response - (COOP) - (154)	Your access level is dev My Account - User Manager re: 1-07/07b2ed9t5962edd
Link People		× Court
Director's Office		1
Benton, Harold - Deputy Health Officer - Pediatric Care Bourne, Jim - Deputy Administrator		
Davis, Marie - Deputy Health Officer		
Jones, Lauren - Deputy Administrator - Dental Health		
Tinley, James - Deputy Administrator - Mental Health		
Division of Minority Health and Disparity Elimination		
Ester, Sandra - Deputy Health Officer		
Emergency Preparedness and Response		
Baker, Jan - Emergency Preparedness Manager		
Burke, Sandy - Planner		
Curry, Walker - Emergency Preparedness Specialist		
Faulk, Lane - Infectious Disease Coordinator		
Fowler, Danny - Administrative Assistant		
New, Linley - Emergency Preparedness Specialist		
	Please Identify Positions Required To Carry Out Functions	
	🙈 Styles 🔹 🖏 🗃 🗇 🤃 💌 🚓 🤘 🗑 Source 🚊	
A D I D W. OTH A TE T A W E T B		
(Save Add New Contact Close	
164		
ARF.		

Figure: Linking People to Essential Functions

- 8. Click in the box to the left of the contact(s) you wish to link to this missionessential function.
- 9. Click "Save."
- 10. You can also provide additional staffing information in the second free-form data entry box.
- Click on the "Link Facility" button if you wish to link a particular building to this mission essential function (see green arrow in figure: linking essential functions). You can also provide additional information in the third freeform data entry box.

BOCD	Public Health Department - Emergency Preparedness and Response - (COOP) - (154)	Your access level is dev My Account - User Menager ce: i=07d7b3ed9f5962edd
Link Facilities		Logout
Data Center, 1456 East End Read, Springfiel Public Health Department Headquarters, 250		
₩ B / U Ap+ Stas + 1≣ Ε Ξ	Please Identify The Facilities Required To Perform The Function	_
	Save Close	
3.164	Copyright © 2804 - 2021, BOLDplanning, Jnc., All rights reserved.	Privace Policy Terms of U

Figure: Linking Facilities

 Click on the "Link Essential Resources" button if you wish to link to this essential function (see orange arrow in figure: linking essential functions). You can also provide additional information in the third free-form data entry box.

Public Health Department - Emergency Preparedness and Response - (COOP) - (154)	Your access level is dev My Account - User Manager ar: 2-07d7b2xd9f5562xdd
Link Vital Records	x = 0747b2ad915952edd
	1.00.00
Dental Education & Clinic Activity Reports	
Dental Education Program Manual	
egratis	
□ FISCAL/CICS	
Health Alert Network	
Immunization Refrigerator and Locker	
Immunization Service and Pediatric Compliance Files	
Guesse Watermark Paper	
N.S. Office/Access/Excel	
Media Contact List	
Microsoft Outlook	
DINDHHS Forms	
PreseletSoft	
Please Identify Resources Required To Carry Out Functions	
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Save Add New Vital Record Close	

Figure: Linking Essential Resources

13. Click "Save."

14. Check to make sure the mission essential function is described correctly in your list.

Linking Resources and Facilities to Your Mission-Essential Functions

Important: In order to link the names of the people who carry out the key roles for these essential functions, the contacts must already be listed in the contacts database.

Primary and alternate facilities are assigned to mission-essential functions in the facility interdependency button. Assignments are displayed in all mission essential functions reports according to the rules of any of the 6 below conditions:

- Condition 1: Primary and alternate facilities are identified, and comments are entered in the comments field = All fields displayed in mission-essential functions reports
- Condition 2: Alternate facility assigned, and comment included, but no primary facility assigned = "No Primary Facility Assigned" text displayed in mission-essential function reports
- Condition 3: Comments added but no primary or alternate facility = only the comment field is displayed in the mission-essential functions report
- Condition 4: Only primary facility identified = displays on the primary facility in the mission-essential functions reports **This is the 'grandfathered' condition that will exist for most plans across the platform. **
- Condition 5: No facilities identified and no comments = "No Primary Facility Assigned" texted displayed in mission essential-functions reports
- Condition 6: Only primary and alternate facility identified, no comments = displays only primary and alternate facilities in the mission-essential functions report

To link the essential resources that support the performance of these mission essential functions, the essential resources must already be listed in the Essential Resources section.

Editing Your Business Impact Analysis

Once your mission-essential functions have been entered, you can edit, view, reprioritize (e.g., choose a different tier for the essential function), or delete your function by clicking on the "Edit/View" button to the right of the essential function. After making any changes, click "Save." To delete the mission essential function, click "Delete."

M	ain Menu General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
me	Essential Functions		Planage Four Plan *	File Archive	Reports	Pressages	- Administration	Logout
	Essential Functions		Add Ne	w Tier Add New Fund	tion			View all by Tier (default)
the state							Import Functiona	t Sort Functions
	1 - Functions to be performed, gi	ven a One Day disru	ption. (Highest priority t	o lowest) Department / Divi	labor.		import encools	To Son Functions
Priority	*Act as liaison between OEM and other count	ty, state, and federal agenc	lés"		ment - Emergency Prepare	dness and		Edit/View
		all small sure and a special shore		Response	and an offering a second			EditViow
#2	"Coordinate emergency services with NGO,	non-profit or religious organ	izations."	Public Health Departs Response	ment - Emergency Prepare	dness and		EditWiew
#3	Document incident activities			Public Health Departs Response	ment - Emergency Prepare	doess and		Edit/View
#4	Initiate response actions during emergencie	s		Public Health Departs Response	ment - Emergency Prepare	dness and		Edit/View
1000	a la contra de la c					11111111111111111111111111111111111111		
#5 Tier	Maintain 24 hour staff duty line. 2 - Functions to be performed, gi Function	ven a One Day - One	Week disruption. (High	Response	4	dhess and	Import Functions	Edit/View
Tier :	2 - Functions to be performed, gi		Week disruption. (High	Response est priority to lowest) Department / Divi Public Health Depart			Import Functions	
Tier : Priority #1	2 - Functions to be performed, gi Function Coordinate with local meteorologists on dev	elaping weather.		Response est priority to lowest) Department / Divi Public Health Depart Response	ision ment - Emergency Prepare	dness and	Import Functions	Edit/View
Tier : riority #1	2 - Functions to be performed, gi Function	elaping weather.		Response est priority to lowest) Department / Divi Public Health Depart Response	sion	dness and	Import Functions	Bort Functions
Tier :	2 - Functions to be performed, gi Function Coordinate with local meteorologists on dev	eloping weather. r irregularities in service del		Response est priority to lowest) Department / Divi Public Health Departs Response Public Health Departs Response	ision ment - Emergency Prepare	dness and .	Import Functions	Edit/View
Tier : riority #1 #2	2 - Functions to be performed, gi Function Coordinate with local meteorologists on dev Mentor county facilities and public works fo	eloping weather. Firregularities in service del		Response est priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response	i sion ment - Emergency Prepare ment - Emergency Prepare	dness and dness and dness and	Import Functions	EditView
Tier : riority #1 #2 #3 #4	2 - Functions to be performed, gi Function Coordinate with local meteorologists on dev Meritor county facilities and public works for Receive incoming emergency notification ca Support PIO in notification mechanisms for	eleping weather. rimegularities in service del lis public information systems.	ivery.	Response est priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response Public Health Depart Response	ision ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare	dness and dness and dness and	Inipot Functions	Edit/Very Edit/Very Edit/Very Edit/Very Edit/Very
Tier : riority #1 #2 #3 #4	2 - Functions to be performed, gi Function Coordinate with local meteorologists on dev Meritor county facilities and public works fo Receive incoming emergency notification ca	eleping weather. rimegularities in service del lis public information systems.	ivery.	Response est priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response Public Health Depart Response	ision ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare st)	dness and dness and dness and		Edit/Very Edit/Very Edit/Very Edit/Very Edit/Very
Tier : rlority #1 #2 #3 #4 Tier : riority	2 - Functions to be performed, gi Function Coordinate with local meteorologists on dev Meritor county facilities and public works for Receive incoming emergency notification ca Support PIO in notification mechanisms for 3 - Functions to be performed, gi	eleping weather. rimegularities in service del lis public information systems.	ivery.	Response est priority to lowest) Department / Divi Public Health Departs Response Dublic Health Departs Response Public Health Departs Response Public Health Departs Response ghest priority to lowee Department / Divi	ision ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare st)	dness and dness and dness and dness and		Edit/Very Edit/Very Edit/Very Edit/Very
Tier: riority #1 #2 #3 #4 Tier: riority #1	2 - Functions to be performed, gi Function Coordinate with local meteoralogists on dev Mericer county facilities and public works fo Receive incoming emergency notification ca Support PIO in notification mechanisms for 3 - Functions to be performed, gi Function	eleping weather. rimegularities in service del lis public information systems.	ivery.	Response est priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response ghest priority to lowee Department / Divi Public Health Depart Response	ision ment - Emergency Prepared ment - Emergency Prepared ment - Emergency Prepared ment - Emergency Prepared st) ision	dness and dness and dness and dness and dness and		EditVice EditVice EditVice EditVice EditVice
Tier : riority #1 #2 #3 #4 Tier :	2 - Functions to be performed, gi Function Coordinate with local meteoralogists on dev Meritor county facilities and public works fo Receive incoming emergency notification ca Support PIO in notification mechanisms for 3 - Functions to be performed, gi Function Conduct community-based training	eleping weather. rimegularities in service del lis public information systems.	ivery.	Response est priority to lowest) Department / Divi Public Health Depart Response Public Health Depart Response Public Health Depart Response ghest priority to lowest Department / Divi Public Health Depart Response	ision ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare ment - Emergency Prepare st) ision ment - Emergency Prepare	dness and dness and dness and dness and dness and dness and dness and		Edit/Very Edit/Very Edit/Very Edit/Very Edit/Very Edit/Very Edit/Very Edit/Very Edit/Very

Figure: Editing Essential Functions

Adding or Changing Tiers

You can add as many tiers as you like. Although they will always be numbered, you are able to change the titles of the added tiers. Also, since some organizations may have functions that are only essential during specific times of the year, you may add tiers to specify seasonality.

1. From the Essential Functions screen, select the "Add New Tier" button.

Mai			Instance: i-07d7b2ed9f5962edd
		nage Your Plan * File Archive Reports Messages	Administration Logout
	Essential Functions 🛛 🔮 🔍	Add New Tier	View all by Tier (default)
Tier 1	- Functions to be performed, given a One Day disruption. (H	lighest priority to lowest)	Import Functions 11 Sort Functions
riority	Function	Department / Division	
#1	"Act as liaison between OEM and other county, state, and federal agencies"	Public Health Department - Emergency Preparedness and Response	EditViow
#2	"Coordinate emergency services with NGO; non-profit or religious organizations."	Public Health Department - Emergency Preparedness and Response	EditView
#3	Document incident activities	Public Health Department - Emergency Preparedness and Response	EditView
#4	Initiate response actions during emergencies	Public Health Department - Emergency Preparedness and Response	EditView
#5	Maintain 24 hour staff duty line.	Public Health Department - Emergency Preparedness and Response	EditView
#1	Coordinate with local meteorologists on developing weather.	Public Health Department - Emergency Preparedness and Response	EditView
#2	Monitor county facilities and public works for irregularities in service delivery.	Public Health Department - Emergency Preparedness and	
**	Monicor councy racinous and public works for irregularities in service derivery.	Response	Eduview
#3	Receive incoming emergency notification calls		Ed#View Ed#View
vero.		Response Public Health Department - Emergency Preparedness and	
#3	Receive incoming emergency notification calls	Response Public Health Department - Emergency Preparedness and Response Public Health Department - Emergency Preparedness and Response	EditView
#3 #4 Tier 3	Receive incoming emergency notification calls Support PIO in notification mechanisms for public information systems.	Response Public Health Department - Emergency Preparedness and Response Public Health Department - Emergency Preparedness and Response	(Edit/Verie (Edit/Verie
#3 #4 Tier 3	Receive incoming emergency notification calls Support PIO in notification mechanisms for public information systems.	Response Public Health Department - Emergency Preparedness and Response Public Health Department - Emergency Preparedness and Response h disruption. (Highest priority to lowest)	(Edit/Verie (Edit/Verie
#3 #4 Tier 3 riority	Receive incoming emergency notification calls Support PIO in notification mechanisms for public information systems. I - Functions to be performed, given a One Week - One Montif Function	Response Public Health Department - Emergency Preparedness and Response Public Health Department - Emergency Preparedness and Response h disruption. (Highest priority to lowest) Department / Division Public Health Department - Emergency Preparedness and	Edit/Nor Edit/Nor Import Functions
#3 #4 Tier 3 riority #1	Receive incoming emergency notification calls Support PIO In notification mechanisms for public information systems. - Functions to be performed, given a One Week - One Montif Function Conduct community-based training	Response Public Health Department - Emergency Preparedness and Response Public Health Department - Emergency Preparedness and Response th disruption. (Highest priority to lowest) Department / Division Fublic Health Department - Emergency Preparedness and Response Public Health Department - Emergency Preparedness and Public Health Department - Emergency Public Health Department -	Edit/Vice Edit/Vice Edit/Vice Edit/Vice

Figure: Add a New Tier

- 2 In the memo field, add a descriptive title.
- 3. Click "Save."

Sample Report for Mission-Essential Functions

Following is a sample report for the essential function section of a plan. Note that the report presents all the information entered into the essential functions section of the plan for each record.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

Essential Functions for City of Springfield - Department of Public Works - Security

- 1. Functions to be performed, given a one-day disruption (highest to lowest priority):
- "Act as liaison between OEM and other county, state, and federal agencies"
- "Coordinate emergency services with NGO, non-profit or religious organizations."
- Document incident activities
- Initiate response actions during emergencies
- Maintain 24-hour staff duty line
- 2. Functions to be performed, given a one-day to one-week disruption (highest to lowest priority):
- Continuation of functions listed under previous tier(s) identified above
- Coordinate with local meteorologists on developing weather
- Monitor county facilities and public works for irregularities in service delivery
- Receive incoming emergency notification calls
- Support PIO in notification mechanisms for public information systems
- 3. Functions to be performed, given a one-week to one-month disruption (highest to lowest priority):
- Continuation of functions listed under previous tier(s) identified above
- Conduct community-based training
- Conduct professional development training
- Coordinate with regional partners
- Perform HSEEP exercises

<u>TIER: 1: Functions to be performed, given a one-day disruption (highest to lowest priority)</u>

<u>FUNCTION</u>: "Act as liaison between OEM and other county, state, and federal agencies"

PRIORITY: #1

PMEF: No

TIER: Functions to be performed, given a one-day disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Jones, Lauren - Deputy Administrator - Dental Health; Baker, Jan -Emergency Preparedness Manager; Curry, Walker - Emergency Preparedness Specialist; Faulk, Lane - Infectious Disease Coordinator; Fowler, Danny -Administrative Assistant; Harbaugh, Jennifer - Director - Vendor Direct Purchases

Essential Resources: CPSQL; Dental Education & Clinic Activity Reports; EGRATIS; FISCAL/CICS; Health Alert Network; Immunization Refrigerator and Locker; Immunization Service and Pediatric Compliance Files

FACILITIES: Data Center; Public Health Department Headquarters

<u>FUNCTION</u>: "Coordinate emergency services with NGO, non-profit or religious organizations."

PRIORITY: # 2

PMEF: No

TIER: Functions to be performed, given a one-day disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

FUNCTION: Document incident activities

PRIORITY: # 3

PMEF: No

TIER: Functions to be performed, given a one-day disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Curry, Walker - Emergency Preparedness Specialist; Faulk, Lane -Infectious Disease Coordinator; Fowler, Danny - Administrative Assistant; New, Linley - Emergency Preparedness Specialist; Smith, Sue - Tuberculosis Controller; Brown, Addison - Director; Campbell, Lori - Payroll Assistant Manager; Burns, Sue -Facilities Manager; Graham, Hayden - Human Resources Coordinator; Lake, Tony -Director of Security

Essential Resources: Dental Education & Clinic Activity Reports; Dental Education Program Manual; EGRATIS; FISCAL/CICS; License Watermark Paper; M.S. Office/Access/Excel; Media Contact List; TNDHHS Forms; PeopleSoft; PHIDDO; Pandemic Flu Plan; Service Provider Contractor Database; T&E system; US Postal Service

FACILITIES: Public Health Department Headquarters

FUNCTION: Initiate response actions during emergencies

PRIORITY: #4

PMEF: No

TIER: Functions to be performed, given a one-day disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Burns, Sue - Facilities Manager; Faulk, Brittney - Human Resources Coordinator; Lake, Tony - Director of Security; Luck, Harley - Facilities Manager

Essential Resources: Dental Education Program Manual; EGRATIS; FISCAL/CICS; Health Alert Network; Immunization Refrigerator and Locker; Immunization Service and Pediatric Compliance Files; LEP; License Watermark Paper; M.S. Office/Access/Excel; Media Contact List; Microsoft Outlook; TNDHHS Forms; PeopleSoft

FACILITIES: Public Health Department Headquarters

FUNCTION: Maintain 24-hour staff duty line

PRIORITY: # 5

PMEF: No

TIER: Functions to be performed, given a one-day disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Ester, Sandra - Deputy Health Officer; Burke, Sandy - Planner; Faulk, Lane - Infectious Disease Coordinator; New, Linley - Emergency Preparedness Specialist; Smith, Sue - Tuberculosis Controller; Sandy, Ken - Staff Engineer

Essential Resources: License Watermark Paper; M.S. Office/Access/Excel; Pandemic Flu Plan; Service Provider Contractor Database; Survey Monkey Database; T&E and Travel Systems; T&E system; Telephone Service; Travel/OKMile; US Postal Service; V-Tracks

<u>TIER: 2: Functions to be performed, given a one-day to one-week disruption</u> (highest to lowest priority)

FUNCTION: Coordinate with local meteorologists on developing weather

PRIORITY: #1

PMEF: No

TIER: Functions to be performed, given a one-day to one-week disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Davis, Marie - Deputy Health Officer; Jones, Lauren - Deputy Administrator - Dental Health; Tinley, James - Deputy Administrator - Mental Health; Ester, Sandra - Deputy Health Officer; Baker, Jan - Emergency Preparedness Manager; Burke, Sandy - Planner; Curry, Walker - Emergency Preparedness Specialist; Faulk, Lane - Infectious Disease Coordinator; Fowler, Danny - Administrative Assistant

Essential Resources: Dental Education Program Manual; EGRATIS; Health Alert Network; Immunization Refrigerator and Locker; Immunization Service and Pediatric Compliance Files; M.S. Office/Access/Excel; Media Contact List; Microsoft Outlook; PHOCIS-OSIIS; PHOCIS/PAR; Pandemic Flu Plan; T&E and Travel Systems; Travel/OKMile; V-Tracks

FACILITIES: Data Center

<u>FUNCTION</u>: Monitor county facilities and public works for irregularities in service delivery.

PRIORITY: # 2

PMEF: No

TIER: Functions to be performed, given a one-day to one-week disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Burke, Sandy - Planner; Curry, Walker - Emergency Preparedness Specialist; Faulk, Lane - Infectious Disease Coordinator; Fowler, Danny -Administrative Assistant; Sandy, Ken - Staff Engineer; Folk, John - Chief Financial Officer; Frazier, Kyle - Epidemiologist; Burns, Sue - Facilities Manager; Luck, Harley -Facilities Manager

Essential Resources: Media Contact List; Microsoft Outlook; TNDHHS Forms; PeopleSoft; PHIDDO; PHOCIS-OSIIS; PHOCIS/PAR; Pandemic Flu Plan; Service Provider Contractor Database; Survey Monkey Database

FACILITIES: Public Health Department Headquarters

FUNCTION: Receive incoming emergency notification calls

PRIORITY: # 3

PMEF: No

TIER: Functions to be performed, given a one-day to one-week disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Sandy, Ken – Staff Engineer; Dixon, Lee Ann – Staff Accountant; Harbaugh, Jennifer – Director–-Vendor Direct Purchases; Folk, John – Chief Financial Officer; Brown, Addison – Director; Frazier, Kyle – Epidemiologist; Jefferson, Jordan – Lead Epidemiologist; Campbell, Lori – Payroll Assistant Manager; Burns, Sue – Facilities Manager; Dawn, George – Facilities Manager; Faulk, Brittney – Human Resources Coordinator; Graham, Hayden – Human Resources Coordinator; Lake, Tony – Director of Security; Luck, Harley – Facilities Manager

Essential Resources: EGRATIS; FISCAL/CICS; Health Alert Network; Immunization Refrigerator and Locker; Immunization Service and Pediatric Compliance Files; LEP; License Watermark Paper; M.S. Office/Access/Excel; Media Contact List; Microsoft Outlook

FACILITIES: Public Health Department Headquarters

<u>FUNCTION</u>: Support PIO in notification mechanisms for public information systems.

PRIORITY: # 4

PMEF: No

TIER: Functions to be performed, given a one-day to one-week disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Burke, Sandy – Planner; Curry, Walker – Emergency Preparedness Specialist; Fowler, Danny – Administrative Assistant; New, Linley – Emergency Preparedness Specialist; Smith, Sue – Tuberculosis Controller; Sandy, Ken – Staff Engineer; Dixon, Lee Ann – Staff Accountant; Harbaugh, Jennifer – Director–-Vendor Direct Purchases; Folk, John – Chief Financial Officer

FACILITIES: Public Health Department Headquarters

<u>TIER: 3: Functions to be performed, given a one-week to one-month disruption</u> (highest to lowest priority)

FUNCTION: Conduct community-based training

PRIORITY: #1

PMEF: No

TIER: Functions to be performed, given a one-week to one-month disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Burke, Sandy – Planner; Fowler, Danny – Administrative Assistant; New, Linley – Emergency Preparedness Specialist; Smith, Sue – Tuberculosis Controller; Sandy, Ken - Staff Engineer; Dixon, Lee Ann - Staff Accountant; Harbaugh, Jennifer -Director--Vendor Direct Purchases; Folk, John - Chief Financial Officer; Brown, Addison - Director; Frazier, Kyle - Epidemiologist

Essential Resources: Media Contact List; Microsoft Outlook; TNDHHS Forms; PeopleSoft; PHIDDO; PHOCIS-OSIIS; PHOCIS/PAR; Pandemic Flu Plan; Service Provider Contractor Database; Survey Monkey Database; T&E and Travel Systems; T&E system; Telephone Service; Travel/OKMile; US Postal Service

FACILITIES: Public Health Department Headquarters

FUNCTION: Conduct professional development training

PRIORITY: # 2

PMEF: No

TIER: Functions to be performed, given a one-week to one-month disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Burns, Sue – Facilities Manager; Dawn, George – Facilities Manager; Faulk, Brittney – Human Resources Coordinator; Graham, Hayden – Human Resources Coordinator; Lake, Tony – Director of Security; Luck, Harley – Facilities Manager; Manning, Caroline – Facilities Manager; Greeley, Kelli – Executive Director; Lewis, Brandon – Director; Hastings, Brian – Manager; Davis, Marie – Deputy Health Officer; Jones, Lauren – Deputy Administrator – Dental Health; Tinley, James – Deputy Administrator – Mental Health; Ester, Sandra – Deputy Health Officer; Baker, Jan – Emergency Preparedness Manager; Burke, Sandy – Planner; Curry, Walker – Emergency Preparedness Specialist; Faulk, Lane – Infectious Disease Coordinator; Fowler, Danny – Administrative Assistant; New, Linley – Emergency Preparedness Specialist; Smith, Sue – Tuberculosis Controller; Sandy, Ken – Staff Engineer; Dixon, Lee Ann – Staff Accountant; Harbaugh, Jennifer – Director–-Vendor Direct Purchases; Jefferson, Jordan – Lead Epidemiologist

Essential Resources: EGRATIS; FISCAL/CICS; Health Alert Network; Immunization Refrigerator and Locker; Immunization Service and Pediatric Compliance Files; LEP;

License Watermark Paper; M.S. Office/Access/Excel; Media Contact List; Microsoft Outlook; TNDHHS Forms

FACILITIES: Public Health Department Headquarters

FUNCTION: Coordinate with regional partners

PRIORITY: # 3

PMEF: No

TIER: Functions to be performed, given a one-week to one-month disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

PERSONNEL: Dixon, Lee Ann - Staff Accountant; Harbaugh, Jennifer - Director--Vendor Direct Purchases; Folk, John - Chief Financial Officer; Brown, Addison -Director; Frazier, Kyle - Epidemiologist; Jefferson, Jordan - Lead Epidemiologist; Campbell, Lori - Payroll Assistant Manager; Burns, Sue - Facilities Manager; Dawn, George - Facilities Manager; Faulk, Brittney - Human Resources Coordinator; Graham, Hayden - Human Resources Coordinator; Lake, Tony - Director of Security; Luck, Harley - Facilities Manager

Essential Resources: Dental Education & Clinic Activity Reports; Dental Education Program Manual; EGRATIS; FISCAL/CICS; M.S. Office/Access/Excel; Media Contact List; Microsoft Outlook; TNDHHS Forms; PeopleSoft; Survey Monkey Database; Telephone Service; Travel/OKMile; US Postal Service; V-Tracks; VR Security Paper

FACILITIES: Public Health Department Headquarters

FUNCTION: Perform HSEEP exercises.

PRIORITY: #4

PMEF: No

TIER: Functions to be performed, given a one-week to one-month disruption (highest to lowest priority)

DEPARTMENT: Public Health Department - Emergency Preparedness and Response

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 department head in General Information, your department head's name will then appear automatically in the Orders of Succession list.

Editing Orders of Succession for Your Department Head



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

Figure: Main Menu - Orders of Succession

2. You will see an order of succession for your department head (using the title of this individual) and the name of your department head listed as primary.

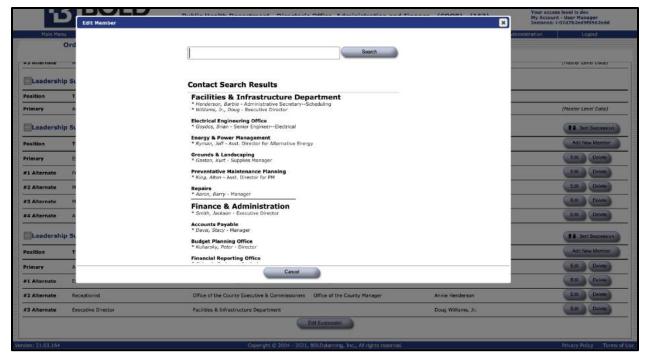
Leadershi	p Succession for Executive Directo	эг.			11 Sert Succession
osition	Title	Department	Division	Name (position currently held by)	Add New Member
rimary	Executive Director	Finance & Administration		Jackson Smith	Edit Delete
1 Alternate	Personnel Director	Human Resources	Personnel & Advancement	Tracy Jackson	Edit Delota
2 Alternate	Manager	Finance & Administration	Accounts Payable	Stacy Davis	Edit Delate
3 Alternate	Manager	Facilities & Infrastructure Department	Repairs	Barry Aaron	Edit Delete
4 Alternate	Asst. Director for Alternative Energy	Facilities & Infrastructure Department	Energy & Power Management	Jeff Ryman	Edit Delote
Leadershi	p Succession for Primary Continui	ty Planner.			14 Sort Succession
osition	Title	Department	Division	Name (position currently held by)	Add New Member
osition trimary	Title Analyst	Department Finance & Administration	Division Financial Reporting Office	Name (position currently held by) Bertram Colpack	Add New Member
0.02.004	Nillion of A				
rimary	Analyst	Finance & Administration	Financial Reporting Office	Bertram Colpack	Edit Deletits
rimary 1 Alternate	Analyst Executive Administrator	Finance & Administration Office of the County Executive & Commissioners	Financial Reporting Office County Board of Commissioners	Bertram Colpack Jim Princeton	Edit Deinte

Figure: Primary Under Executive Director

3. Click the "Edit" button to the right of the row called "#1 Alternate."

	Administrator	Chief Executive Office		Justin Bunch	(Master Level Data)
Leadershi	p Succession for Executive Directo	or.			11 Sert Succession
osition	Title	Department	Division	Name (position currently held by)	Add New Member
rimary	Executive Director	Finance & Administration		Jackson Smith	Edit Delete
1 Alternate	Personnel Director	Human Resources	Personnel & Advancement	Tracy Jackson	Edit
2 Alternate	Manager	Finance & Administration	Accounts Payable	Stacy Davis	Edit Delete
3 Alternate	Manager	Facilities & Infrastructure Department	Repairs	Barry Aaron	Edit Delete
4 Alternate	Asst. Director for Alternative Energy	Facilities & Infrastructure Department	Energy & Power Management	Jeff Ryman	Edit Deloto
Leadershi	p Succession for Primary Continui	ty Planner.			14 Sort Succession
Leadershi	ip Succession for Primary Continui Title	ty Planner. Department	Division	Name (position currently held by)	Add New Member
			Division Financial Reporting Office	Name (position currently held by) Bertram Colpack	
osition	Title	Department			Add New Member
osition rimary	Title Analyst	Department Finance & Administration	Financial Reporting Office	Bertram Colpack	Add New Member
rimary 1 Alternate	Title Analyst Executive Administrator	Department Finance & Administration Office of the County Executive & Commissioners	Financial Reporting Office County Board of Commissioners	Bertram Colpack Jim Princeton	Add New Member Edit Delete Edit Delete

Figure: Editing Orders of Succession



4. Find the appropriate name in the contact search results and click on it.

Figure: Assigning Contacts

- 5. Check to see that the person is listed correctly as #1 Alternate. If not, edit or delete the name using the buttons to the right.
- 6. Repeat steps 3 through 5 for #2 Alternate and #3 Alternate, if possible.

Adding and Editing Orders of Succession for Your Teams

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

BOLD	Main Menu Orpartment of Inform	nation Technology - Q3OP - (147)	>			Welcome, Ke Your userman Your access i My Accessit Eastances i G	ner in Kasta.
Main Menu Pan • Main Menu 6	Actions =	People +	Places +	Things +	View Plan	Administration	Logsu!
Plan General love Messages Actions Essential Functions Poople Genetats Develutions	Fix Archive Frie Archive	View Nat Delegations of Authorit	BOLDplenning.com w also a "living plan". Using the buttons to For security purpose Per comments or que		fized on-line planning environmen in each section of your COOP plan finished with your session.	our Continuity of Operations Plan III, that not only produces a herd	
Places Facilities Seturity and Access Things Communications TTE / Plan Membranes TTE / Plan Membranes	unces Aiert Notification Procedure	et) Con Kits					

Figure: Orders of Succession for Teams

2. Click "Add New Succession," enter the title of the position, and click "Save."

Main Men	u General Info	Contacts	Manage Your Plan =	File Archive	Reports	Messages	Administration	Logout
	Orders of Succession	0 0	ſ	Add New Succession				
Leadershi	p Succession for Executive T	eam Chief.						
Position	Title	Department		Division		Name (position currently I	vald by)	
Primary	Manager	Chief Executive Of	fice	Mayors Office		Bryan Turner		(Master Level Data
#1 Alternate	Research Assistant	Finance		Billing		Mike Pope		(Master Level Data
#2 Alternate	Administrator	Human Resources		Risk Management		Cheryl James		(Master Level Dat
Leadershi	p Succession for Pandemic T	eam Chief.						
Position	Title	Department		Division		Name (position currently !	eld by)	
Primary	Manager	Human Resources		Risk Management		Sue Burns		(Master Level Dati
#1 Alternate	Planner	Fire Services		Emergency Medical Staff		Sandy Burke		(Master Level Dat
#2 Alternate	Captain	Fire Services		Fire Department	1-	Jan Baker		(Master Level Dat
	Administrative Assistant	Fire Services		Emeroency Management		Danny Fowler		(Master Level Dat

Figure: Adding a New Succession

3. Click the "Add New Member Button" or the "Edit" button to the right of the row.

	Administrator	Chief Executive Office		Justin Bunch	(Master Level Data)
Leadershi	p Succession for Executive Directo	or.			14 Sert Succession
Position	Title	Department	Division	Name (position currently held by)	Add New Member
Primary	Executive Director	Finance & Administration		Jackson Smith	Edit Delete
1 Alternate	Personnel Director	Human Resources	Personnel & Advancement	Tracy Jackson	Edit Delete
#2 Alternate	Manager	Finance & Administration	Accounts Payable	Stacy Davis	Edit Delete
#3 Alternate	Manager	Facilities & Infrastructure Department	Repairs	Barry Aaron	Edit Delete
4 Alternate	Asst. Director for Alternative Energy	Facilities & Infrastructure Department	Energy & Power Management	Jeff Ryman	Edit Deloto
Leadershi	p Succession for Primary Continui	ty Planner.			14 Sort Succession
-	p Succession for Primary Continui Title	ty Planner. Department	Division	Name (position currently held by)	Add New Member
Leadership Position Primary			Division Financial Reporting Office	Name (position currently held by) . Bertram Colpack	
Position	Title	Department			Add New Member
osition rimary	Title Analyst	Department Finance & Administration	Financial Reporting Office	Bertram Colpack	Add New Member Edit Dolnie
osition rimary 1 Alternate 2 Alternate	Title Analyst Executive Administrator	Department Finance & Administration Office of the County Executive & Commissioners	Financial Reporting Office County Board of Commissioners	Bertram Colpack Jim Princeton	Add New Member Edit Deletes Edit Delete
rimary 1 Alternate	Title Analyst Executive Administrator Receptionist	Department Finance & Administration Office of the County Executive & Commissioners Office of the County Executive & Commissioners Facilities & Infrastructure Department	Financial Reporting Office County Board of Commissioners	Bertram Colpack Jim Princeton Annie Henderson	Add New Member Edit Delete Edit Delete

Figure: Add New Member

4. Find the appropriate name in the contact search results and click on it.

Edit Member	Roble Health Represent Rissiands Office Administration and P	×	Your access level is dev My Account - User Manager Instance: I-07/67b2ed9f5962edd
Main Menu			desinistration logout
Ord	Search		
	E		(rijastēr Level Cata)
Leadership St	Contact Search Results		
Position T Primary A	Facilities & Infrastructure Department * Inderson, Barkie - Administrative SecretaryScheduling * Williams, Jr., Duag - Executive Director		(Master Level Data)
Leadership Su	Electrical Engineering Office * Goydos, Brian - Senior EngineerElectrical		14 Sert Succession
Position T	Energy & Power Management * Ryman, Jeff - Asst. Director for Alternative Energy		Add New Member
Primary E	Grounds & Landscaping * Gaston, Kurt - Supplies Manager		(Ed) (Deleta)
#1 Alternate Pr	Preventative Maintenance Planning * King, Atton - Asst, Director for PM		Edl Delot
#2 Alternate M	Repairs * Aaron, Barry - Manager		Edt (Dainter)
#3 Alternate M	Finance & Administration * Smith, Jackson - Executive Director		Edt Dolda
Leadership St	Accounts Payable * Devis, Stecy - Maniager Budget Planning Office * Kalarsiky, Peter - Director		11 Ser Succession
Position T	Financial Reporting Office		Add New Member
Primary A	Canool		Est Dolda
#1 Alternate E. #2 Alternate Receptionist	Office of the County Executive & Commissioners Office of the County Manager	Annie Henderson	Edt Deinte
#3 Alternate Executive Director	Facilities & Infrastructure Department	Doug Williams, Jr.	Eat
	Edit Suntension		
Version 2).03.164	Copyright © 2004 - 2021, 8DLDplanning, Inc., All Highternealityari.		Privacy Rolley Terms of Use

Figure: Searching Contacts for Orders of Succession

- 5. Check to see that the person is listed correctly. If not, edit or delete the name using the buttons to the right.
- 6. Repeat steps 3 through 5 for all possible alternates.

Sorting How People Are Assigned as the Primary or Alternates

1. Click on the "Sort Succession" button to the right of the name of the succession.

	Administrator	Chief Executive Office		Justin Bunch	(Master Level Data)
Leadersh	ip Succession for Executive Directo	r.			TH Sert Succession
Position	Title	Department	Division	Name (position currently held by)	Add New Member
Primary	Executive Director	Finance & Administration		Jackson Smith	Edit Delete
#1 Alternate	Personnel Director	Human Resources	Personnel & Advancement	Tracy Jackson	Edit Deleta
#2 Alternate	Manager	Finance & Administration	Accounts Payable	Stacy Davis	Edit Delate
#3 Alternate	Manager	Facilities & Infrastructure Department	Repairs	Barry Aaron	Edit Delete
#4 Alternate	Asst. Director for Alternative Energy	Facilities & Infrastructure Department	Energy & Power Management	Jeff Ryman	Edit Delote
	ip Succession for Primary Continui	Department	Division	Name (position currently held by)	Add New Member
Position			Division Financial Reporting Office	Name (position currently held by) Bertram Colpack	
Position Primary	Title	Department			Add New Member
Position Primary #1 Alternate	Title Analyst	Department Finance & Administration	Financial Reporting Office	Bertram Colpack	Add New Member
Leadershi Position Primary #1 Alternate #2 Alternate #3 Alternate	Title Analyst Executive Administrator	Department Finance & Administration Office of the County Executive & Commissioners	Financial Reporting Office County Board of Commissioners	Bertram Colpack Jim Princeton	Add New Member Edit Delete
Position Primary #1 Alternate #2 Alternate	Title Analyst Executive Administrator Receptionist	Department Finance & Administration Office of the County Executive & Commissioners Office of the County Executive & Commissioners Facilities & Infrastructure Department	Financial Reporting Office County Board of Commissioners	Bertram Colpack Jim Princeton Annie Henderson	Add New Member Edit Delete Edit Delete Edit Delete

Figure: Sorting Succession

2. Place your cursor over the name of the person who will fulfill a different primary or alternate position.

- 15			admont Dissolute Office Administration o		/our access level is dev Manager
	Sort Succession	is .			X Zed9/5962edd
Main Manu		uccession for Executive Director.			Labout
Ord	Position	Title	Agency	Name (position currently held by)	
1000	Primary	Executive Director	Finance & Administration	Jackson Smith	
PO POLEHIBLE P	#1 Alternate	Personnel Director	Human Resources	Tracy Jackson	or boker claupy
	#2 Alternate	Manapar	Enance & Administration	Starty Davids	
Leadership St	#3 Alternate	Manager Asst. Director for Alternative Energy	Facilities & Infrastructure Department Facilities & Infrastructure Department	Barry Aaron Jeff Ryman	
	#4 Alternate	Asst. Director for Alternative cilergy	Pacifices of thirdscructure Department	Jen Kyinan	
Position T					
Primary A					er Laval Data)
Leadership St					Bort Succession
Position T					40 New Member
Primary E					II Drinte
#1 Alternate P					SI Delete
#2 Alternate M					11 Deluta
#3 Alternate H					E (Dalistan)
#4 Alternate A					at Delete
Leadership Su					Bort Succession
Position T					Art New Member
Primary A					Daton
#1 Alternate E					II (Drinte)
#2 Alternate R					R Datete
#3 Alternate E			Save		B Dolote

Figure: Alternate Positions

3. When you see the crossed arrows, hold down the left cursor and drag the name to the new position. (Note that the position title moves with the name. You can ignore this.)

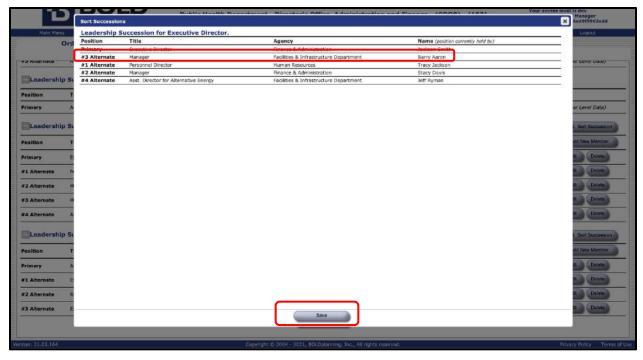


Figure: Alternate Positions

- 4. Release the cursor when the person is in the new correct primary or alternate position in the list.
- 5. Click "Save."
- 6. Check to see if the Order of Succession is now displayed correctly.

osition	Title	Department	Division	Name (position currently held by)	Add New Member
rimary	Executive Director	Finance & Administration		Jackson Smith	Edit Dolata
1 Alternate	Manager	Facilities & Infrastructure Department	Repairs	Barry Aaron	Edit Deleta
#2 Alternate	Personnel Director	Human Resources	Personnel & Advancement	Tracy Jackson	Edit Dolote
#3 Alternate	Manager	Finance & Administration	Accounts Payable	Stacy Davis	Edit Delata
#4 Alternate	Asst. Director for Alternative Energy	Facilities & Infrastructure Department	Energy & Power Management	Jeff Ryman	Edit Delete
	p Succession for Primary Continuit				15 Sert Succession
Position	Title	Department	Division	Name (position currently held by)	Add New Member
Primary	Analyst	Finance & Administration	Financial Reporting Office	Bertram Colpack	Edit Deloto
#1 Alternate	Executive Administrator	Office of the County Executive & Commissioners	County Board of Commissioners	Jim Princeton	Edit Delete
#2 Alternate	Receptionist	Office of the County Executive & Commissioners	Office of the County Manager	Annie Henderson	Edit Delete
#3 Alternate	Executive Director	Facilities & Infrastructure Department		Doug Williams, Jr.	Edit Dolota

Figure: Order of Succession View

Sample Report for Orders of Succession

Following is a sample report for the orders of succession section of a plan.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

Orders of Succession for Public Health Department - Director's Office, Administration and Finance

The Public Health Department - Director's Office, Administration and Finance has developed an orders of succession for all key positions held within the organization. Provided below is the title and name of each primary person currently holding each key position, followed by a list of designated successors. The successors are listed by title in order of precedence.

Executive Team Chief - Order of Succession:

Primary: Manager - Bryan Turner - Chief Executive Office - Mayors Office

- 1. Research Assistant Mike Pope Finance Billing Court
- 2. Administrator Cheryl James Human Resources Risk Management -Employee Health

Pandemic Team Chief - Order of Succession:

Primary: Manager - Sue Burns - Human Resources - Risk Management

- 1. Planner Sandy Burke Fire Services Emergency Medical Staff
- 2. Captain Jan Baker Fire Services Fire Department
- 3. Administrative Assistant Danny Fowler Fire Services Emergency Management - Logistics Staff

leader of the free world - Order of Succession:

Primary: Administrator - Justin Bunch - Chief Executive Office

Executive Director (Jackson Smith) - Order of Succession

Primary: Executive Director - Jackson Smith - Finance & Administration

- 1. Manager Barry Aaron Facilities & Infrastructure Department Repairs
- 2. Personnel Director Tracy Jackson Human Resources Personnel & Advancement
- 3. Manager Stacy Davis Finance & Administration Accounts Payable
- 4. Asst. Director for Alternative Energy Jeff Ryman Facilities & Infrastructure Department - Energy & Power Management

Primary Continuity Planner - Order of Succession:

Primary: Analyst - Bertram Colpack - Finance & Administration - Financial Reporting Office

1. Executive Administrator - Jim Princeton - Office of the County Executive & Commissioners - County Board of Commissioners

- 2. Receptionist Annie Henderson Office of the County Executive & Commissioners - Office of the County Manager
- 3. Executive Director Doug Williams, Jr. Facilities & Infrastructure Department

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 **Continuity 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.

-B BOLD	Main Menu Department of Information	ation Technology - C30P - (147)				Your common Your access My Account	eyle McMahen. me is Xaşla. Iavel is dev - User Manager 24979be4/6fe19f32 Help
Man Menu Pan + Main Menu 🧭	Actions =	Propie +	Places +	Things +	View Plan	Administration	Logaut
Plan General Inte Actions Execution People Contacts Descutions	File Archive Orders of Succession	View Ban Delegations of Authority	BOLDplenning.com also a "living plan". Using the buttons to For security purpos	tenning com, your on-line source fr ves designed to create a standard a the left, you can navigate throug es, please be sure to top-off when uestions, please contect us at <u>halad</u>	fized on-line planning environmy in each section of your CODP pli finished with your session.	ent, that not only produces a hard	
Places Facilities Faci	Alert Notification Proceediane	a Ge Kits					
TTE / Plan Maintenance References / Authorities							

Figure: Main Menu – Delegations of Authority

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

	planning	*MasterSy	stem* - (COOP) - (-1)				Your acces My Accoun Instance: i	s level is dev t - User Manager -07d7b2ed9f5962edd
	Main Menu General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
	Delegation of Authority	9	di diana anti in ar	de compositores de		10002000007	ki	D
1	Delegation of Authority			And the second s				
				Add New Delegation				
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1000								
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Vers	ion: 21.03.164		Copyright @ 2004 -	2021, BOLDplanning, Inc., All	rights reserved.			Privacy Policy Terms of Use

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.

is du	Add New Delegation	Your access level is dev My Account - User Manager
plan	Delegation of Authority: Name of Delegation of Authority	Ny Account - User Manager Instance: 1-07d7b2ed9f5962edd
Main Manu Genera	Delegation of Authority Trigger Conditions:	Administration Logist
Delegation of Au	19 B I U Ar Son - E E 1 M B B B B B B B B String -	
	🗇 🔯 🖾 🗇 🤫 🕅 Kouros 🚔	
	What are the triggering conditions for this authority? Is the person incapacitated or unavailble?	
	Delegation of Authority Umitations:	
	What limitations might there be for this authority being performed?	
Version: 21/01/164	Provente il 2011 - 2021 INI Delavrona Tor. All viente revenuet	Privacy Tailory Typeres of Day

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.

D plannin	g Emergency Management Demo - (COOP) - (149)	Your access level is dev My Account - User Manager Instance: I-07d7b2ed9f5962edd
Main Menu General Info Delegation of Authority	Contacts Manage Your Plan + 1	File Archive Reports Melsages Adm	inistration Logout
Delegation of Authority	Add New Delegation	Sort Delegations	
Travel Authorization - Acting Agen	ts		18 Sort Agents
itle	Department	Name (Position currently held by)	Add Acting Agent
lanager	Chief Executive Office	Marie Davis	Edit Delete
lanager	Chief Executive Office	Marie Davis	Edit
Travel Authorization - Delegated A	gents		11 Sort Agents
ïtle	Department	Name (Delegated to)	Add Delegated Agent
lirector	Emergency Management	Byron Talmadge	Edit Dolota
M Coordinator	Emergency Management	Oliver Babbish	Edit Delata
		Desception	11 Sort Agents
	utilities - Acting Agents		Statement and a state of the st
Purchase Requisitions/Spending A	Department	Name (Position currently held by)	Add Acting Agent
-	Department Emergency Management	Name (Position currently held by) Byron Talmadge	Add Acting Agent
itle	Emergency Management		
iite	Emergency Management		Edit Delete

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)

ъ.	planning	Emergence	Management Demo	- (COOP) - (149)			My Accor	ess level is dev unt – User Manager :: i–07d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
Delega	tion of Authority	Ø 9	dimension					
			Add Ne	ew Delegation Sort Dele	gations			
Travel Authoriza	ation - Acting Agents							11 Sort Agents
Title		Depar	tment		Name (Position curr	ently held by)		Add Acting Agent
Manager		Chief 8	xecutive Office		Marie Davis			Edit Delate
Manager		Chief E	xecutive Office		Marie Davis			Edit Delete
Travel Authoriza	ation - Delegated Agent	5						11 Sort Agents
Title		Depar	tment		Name (Delegated to))		Add Delegated Agent
Director		Emerg	ency Management		Byron Talmadge			Edit Delote
EM Coordinator		Emerg	ency Management		Oliver Babbish			Edit Delata
				Edit Delegation				
Purchase Requi	sitions/Spending Autho	ority - Acting Agent	s					11 Sort Agents
Title		Depar	tment		Name (Position curr	ently held by)		Add Acting Agent
Director		Emerg	ency Management		Byron Talmadge			Edit Delete
Purchase Requir	sitions/Spending Autho	rity - Delegated Ag	ents					tt Scrt Agents
Title		Depar	tment		Name (Delegated to))		Add Delegated Agent
EM Coordinator		Emerg	ency Management		Oliver Babbish			Edit Delete

Figure: Delete Delegation

Editing Delegations of Authority

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

BOLD	Main Menu Department of Isforms	tion Technology - COOP - (147)				Welcome, Key Your usernam Your access to My Accessint - Eastances i -04	er in Kasta. aval in dav
Man Menu Pan - Main Menu 🧭	Actiana =	People +	Places +	Things +	View Plan	Administration	Logaut
Plan General Strib Messages Actions Essertial Functories People	Fin Archiva	View Har	BOLDplanning.com w sise a "living plan". Using the buttons to For security purposes		ized on-line plenning enstronm h each section of your CODP pli finished with your session.	our Continuity of Operations Plan i ent, that not only produces a head an.	
Contacts Teams Develutions Places Facilities Servicity and Access	Orders of Succession	Delegations of Authority					
Things Communications Essential features/Resources .TE / Plan Membranos / Autoantives	Aiert Notification Procedures	Gents					

Figure: Main Menu – Delegations of Authority

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

planning	Emergency Management Demo - (COOP) - (149)	Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f5962edd
Main Menu General Info	Contacts Manage Your Plan +	File Archive Reports Messages	Administration Logout
Delegation of Authority	🚱 🍯	elegation Sort Delegations	
Travel Authorization - Acting Agents	7.001		14 Sort Agenta
Title	Department	Name (Position currently held by)	Add Acting Agent
Manager	Chief Executive Office	Marie Davis	Esit Delete
Manager	Chief Executive Office	Marie Davis	Edit Delete
Travel Authorization - Delegated Agent	5		14 Sort Agents
Title	Department	Name (Delegated to)	Add Delegated Agent
Director	Emergency Management	Byron Talmadge	Edit Dolete
EM Coordinator	Emergancy Management	Oliver Babbish	Edit Delata
	(Edit Delegation	
Purchase Requisitions/Spending Author	ority - Acting Agents		11 Sort Agenta
Title	Department	Name (Position currently held by)	Add Acting Agent
Director	Emergency Management	Byron Talmadge	Edit
Purchase Requisitions/Spending Author	rity - Delegated Agents		11 Sort Agents
Title	Department	Name (Delegated to)	Add Delegated Agent
EM Coordinator	Emergency Management	Oliver Babbish	Edil Delete
sion: 21.02.154	Convertes of 2004 - 2	1021 BOI Delacolog Tor. All rights reserved	Britany Policy Termo

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.

planning	Emergency Management Demo - (COOP) - (149)		Your access level is dev My Account - User Manager Instance: 1-07d7b2ed9f5962edd
Planning Main Reru Converted Adv Delegation of Authority Purchase Requisitions/Spending Authority Title Director Purchase Requisitions/Spending Authority Title EM Coordinator Namoper Execution of Contractual Agreements - Acts	Add New Member Contact Search Results Chief Executive Office - Bundry, Justin - Amanger - Bundry, Marie - Manager - Bundry, Bundry - Manager - Bundry, Bundry - Manager - Bundry, Bundry - Bundry	Search	Emisance: i-072752-dev3596.2xed3
Title	Information Technology		Add Acting Agent
Administrator	are		Edt
Execution of Contractual Agreements - Dele	Carcel	Name (Descaped to)	Anti Delegatos Agenta
Director	Emergency Hanagement	Byron Talmadge	E.M. Dointe
	Contraction of the second s		

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."

planning	Emergency Management Demo - (CO	OP) - (149)	Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f5962edd
Main Menu General Info	Contacts Manage Your Plan +	File Archive Reports Messages A	dministration Logout
Delegation of Authority	© •		
	Add New Delega	fion Sort Delegations	
Travel Authorization - Acting Agents			14 Sort Agents
tie	Department	Name (Position currently held by)	Add Acting Agent
lanager	Chief Executive Office	Marle Davis	Edit Deletin
lanager	Chief Executive Office	Marie Davis	Edit Delete
Travel Authorization - Delegated Agent	s		11 Sort Agents
itle	Department	Name (Delegated to)	Add Delegated Agent
lirector	Emergency Management	Byron Talmadge	Edit
M Coordinator	Emergency Management	Offver Babbish	Edit Doleta
		Edit Delegation	
Purchase Requisitions/Spending Author	ority - Acting Agents		14 Sort Agenta
itle	Department	Name (Position currently held by)	Add Acting Agent
lirector	Emergency Management	Byron Talmadge	Edit Delete
Purchase Requisitions/Spending Author	ority - Delegated Agents		ti Sort Agents
ītie	Department	Name (Delegated to)	Add Delegated Agent

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.

planning	Emergency Management Demo - (COO	P) - (149)	Your access level is dev My Account - User Manager Instance: I-07d7b2ed9f5962edd
Main Menu General Info	Contacts Manage Your Plan +	File Archive Reports Messages	Administration Logout
Delegation of Authority	🖉 🗧	n Sort Delegations	
Travel Authorization - Acting Agents			18 Sort Agents
itle	Department	Name (Position currently held by)	Add Acting Agent
lanager	Chief Executive Office	Marie Davis	Edit Delete
lanager	Chief Executive Office	Marie Davis	Edit
Travel Authorization - Delegated Age	nts		14 Sort Agents
ïtle	Department	Name (Delegated to)	Add Delegated Agent
lirector	Emergency Management	Byron Taimadge	Edit
M Coordinator	Emergency Management	Oliver Babbish	Edit Delata
	Ed	I Delegation	
Purchase Requisitions/Spending Aut	hority - Acting Agents		11 Sort Agents
ïtle	Department	Name (Position currently held by)	Add Acting Agent
lirector	Emergency Management	Byron Talmadge	E.fit Delists
Purchase Requisitions/Spending Aut	nority - Delegated Agents		1 Scrt Agents
		Manager (Defended & e.)	Add Delegated Agent
itle	Department	Name (Delegated to)	Find the Party of the st

Figure: Add Delegated Agent

planning	Emergency Management Demo - (COOP) - (149)		Your access level is dev My Account - User Manager Instance: 1-07d7b2ed9f5962edd
Main Monu Conserved Index Delegation of Authority	Add New Member	Search	Administration Lagout
Purchase Regulations/Spending Authority Title Director Purchase Regulations/Spending Authority Title EM Coordinator Nanager	Contact Search Results Chief Executive Office * Bunch, Justin - Administrator City Secretary * Jowin, Mane - Manager Cagai staff * Safer, Sandra - Manager * Carter, Synar Manager * Communications Public Information * Dowin, Samuel - Risk Manager Sciel Media * Safer Communications		Att Acting Agent Att Acting Agent Call Dates Att Dates Att Dates Call Dates Ett Dates Ett Dates
Execution of Contractual Agreements - Acti Title Administrator Execution of Contractual Agreements - Dele Title	* Ganek, Britting + Coordinater * Venec, Chron + Public Information Office Emergency Managements * Banade, Grym - Direction Tafmade, Brym - Direction Thformation Technology grs Cancel Department	Name (Delegated to)	Sort Agents Add Adring Agent Case Distain Anti Delegaced Agent Anti Delegaced Agent
Director	Emergency Menagement	Byron Telmedge	E.H. Dolet

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.

Emergency Management Demo - (COOP)	- (149)	My Account - User Manager Instance: i-07d7b2ed9f5962edd
Contacts Manage Your Plan • Fi	Re Archive Reports Messages A	dministration Logout
5		t Sort Agents
Department	Name (Position currently held by)	Add Acting Agent
Chief Executive Office	Marle Davis	Edit
Chief Executive Office	Marie Davis	Edit Delete
ents		tt Sort Agents
Department	Name (Delegated to)	Add Delegated Agent
Emergency Management	Byron Taimadge	Edit
Emergency Management	Oliver Babbish	Edit Delata
Edit C	Delegation	
ithority - Acting Agents		11 Sort Agents
Department	Name (Position currently held by)	Add Acting Agent
Emergency Management	Byron Talmadge	Edit Delete
thority - Delegated Agents		11 Sort Agents
Department	Name (Delegated to)	Add Delegated Agent
Emergency Management	Oliver Babbish	Edit
	Contacts Manager Your Plan = Image: Your Plan = Image: Your Plan = Image: Your Plan = Add New Delegation Image: Your Plan = Image: Your Plan = Image: Your Plan = Add New Delegation Image: Your Plan = Image: Your Plan = Image: Your Plan = Image: Your Plan =	Contracts Manage Your Plan * File Archive Reports Messages A Image: Contracts Manage Your Plan * File Archive Reports Messages A Image: Contracts Sort Delegation Sort Delegations Sort Delegations

Figure: Sort Agents

Sorting How the Delegations Are Listed

1. Place your cursor over the name of the person who will fulfill a different Delegated Agent (or Acting Agent) position.

		Manager 100001 (110)		Your access level is dev
Sort Ag	jents		*	Hy Account - User Manager Instance: 1-07/07h2ed9f5902edd
Main Menu Purch	ase Requisitions/Spending Authority	1		dmontecretion Logour
Deley Title		Department	Name (Delegated to)	
EM Coor			Oliver Babbish	
Manage	r	Chief Executive Office	Bryan Turner	
Purchase Req				R& Sort Agents
Title				Add Atting Agent
Director				Edit Duleta
Purchase Reg				18 Sort Agents
Title				Add Delegated Agent
EM Coordinator				Edit Dvivin
Managor				Edil Dalatia
Execution of C				ti Son Agenta
Title				Ackt Acting Agent
Administrator				Edit Dolete
		Save		
Execution of Contract	ual Agreements - Delegated Agents			18 Sort Agents
Title	Departr	nent	Name (Delegated to)	Add Delegated Agent
Director	Emergen	cy Management	Byron Talmadge	Edit Dateite
Manager	Chief Ex	outive Office	Sandra Ester	Edit Dolete
		Annalistic & TARL - 1951 - EPS Paralising - 100 - 1	11111111111111111111111111111111111111	Billion Ballin - Revolution

Figure: Sorting Agents for Delegation of Authority

- 2. When you see the crossed arrows, hold down the left cursor and drag the name to the new position. (Note that the position title moves with the name. You can ignore this.)
- 3. Release the cursor when the person is in the new correct Acting Agent or Delegated Agent position in the list.

55.	DOLD	Farmer Hannes and Dame (2001	. (110)	Your access level is dev
	Sort Agents			Ny Account - User Manager Instance: I-07d7b2ed9f5962edd
Main Menu	Purchase Requisitions/Sp			dministration Lippus
Dele	Title	Department	Name (Delegated to)	
	Manager	Chief Executive Office	Bryan Turner	
	EM Coordinator	Emergency Management	Oliver Babbish	
Purchase Req				Bort Agunta
Title				Add Acting Agent
Director				E.M. Dokya
				14 Bert Agents
Purchase Req				
Title				Add Dakostos Agam
EM Coordinator				E tit Dates
Manager				Edit. Dokto
Execution of (t Sort Agents
Title				Add Acting Agent
Administrator		Save		Edit Datam
			J	24 Bort Agents
Execution of C	ontractual Agreements - De	legated Agents		
Title		Department	Name (Delogated to)	Add Delogated Agent
Director		Emergency Management	Byron Talmadge	Ent Com
Manager		Chief Executive Office	Sandra Ester	Est Debre
0				

Figure: Dragging Agents to Sort for Delegation of Authority

- 4. Click "Save."
- 5. Check to see if the Delegation of Authority is now displayed correctly.

Sample Report for Delegations of Authority

Following is a sample report for the delegations of authority section of a plan.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

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MEMORANDUM
TO:
FROM:
DATE:
SUBJECT: Delegation of Authority
ALL AUTHORITY HEREBY DELEGATED SHALL BE EXERCISED IN ACCORDANCE WITH

APPLICABLE LAWS, RULES, BUDGET ALLOCATIONS AND ADMINISTRATIVE DIRECTIVES. THIS AUTHORITY CANNOT BE RE-DELEGATED.

To ensure continuity of operations for the emergency management demo during continuity events, the following personnel are hereby delegated the authority to conduct the following assignments provided below.

Leave Authorization

Triggering Conditions: Leave authorization is the ability to grant personnel time off for personal or medical reasons. Department managers have the authority to review and approve leave for periods of 5 consecutive days or shorter durations. The Fulton County Human Resources Department must review and approve longer leave periods.

Limitations:

<u>Acting Agents</u>: Sandra Ester/Manager Bryan Turner/Manager

<u>Delegated Agents</u>: Bryan Turner/Manager Will Minkoff/Deputy Administrator Samuel Davis/Risk Manager

Purchase Requisitions/Spending Authority

Triggering Conditions: The authority to purchase items or spend money is approved at the department head level for amounts under \$10,000 per purchase. When spending over \$10,000 on services or equipment, approval must be granted by the Fulton County Purchasing Department.

Limitations:

<u>Acting Agents</u>: Addison Brown/Audit

<u>Delegated Agents</u>: Jordan Jefferson/Lead Administrator Justin Bunch/Administrator Kim Branch/Administrator

Travel Authorization

<u>Acting Agents</u>: Marie Davis/Manager

<u>Delegated Agents</u>: Byron Talmadge/Director Oliver Babbish/EM Coordinator

Purchase Requisitions/Spending Authority

<u>Acting Agents</u>: Byron Talmadge/Director

<u>Delegated Agents</u>: Oliver Babbish/EM Coordinator Bryan Turner/Manager

Execution of Contractual Agreements

<u>Acting Agents</u>: Justin Bunch/Administrator

<u>Delegated Agents</u>: Byron Talmadge/Director Sandra Ester/Manager

Authorized Signature:

Emergency management demo

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.

	9 Main Menu Department of Inform	nation Technology - COOP - (147)				Your usernar Your access My Account -	
ManMany Pan+	Actions +	Propie +	Places +	Things +	View Plan	Administration	Logiu!
Plan General lote Messa Actions Esserblar Functions People Contexts Texn Devolutions		View Nati	BOLDglenning.com also a "living plan". Using the buttens to For security purpose For comments or qu	anning com, your on-line source h kes designed to create a standard the left, you can navigate throug s, please be sure to togo of when estimm, please context us at <u>balan</u>	laed on-line planning environmen h each section of your CODP plan finished with your session.	nt, that not only produces a hand	
Places Facilities Security an Things Communications Essential Reserve		a) Ge Nits					
TTE / Plan Membrance References /	Authorities						

Figure: Main Menu – Alert Notification Procedures

2. Review the information provided for initial activation, first, and second level alerts.

planning	Public He	alth Department - Direc	tor's Office, Admin	istration and Fina	ance - (COOP) - (153)	Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f596	2edd
Main Menu General Info	Contacts	Manage Your Plan +	File Archive	Reports	Méssages	Administration Logout	a
Alert Notification Procedures	3 •						
			Commentation of				
The Department Head will notify the Continuity Team Chie	f to activate the continuit	ty plan.					Edit
Upon notification to activate the continuity plan, the Contin	nuity Team Chief will per	form the following duties:					
Contact the key staff members identified within this For facility related activations, notify the Alternate As needed, notify the local and/or state Emergency Report the progress of the notification process to the	Facility Manager of the a Operations Center that	ppropriate alternate facility regardi	ing the activation of the con	tinuity plan.	in progress.		Edit
Once the continuity plan is activated, the key staff membe	rs will contact their staff	s using the following procedures:					
 Attempt to call each person in his or her chain-of-c Make a second attempt to contact those individuals contact. Report status of cascade, including names of person 	s who were not initially a	vailable. If this attempt is unsucces			end a text, or use any other metho	d of communications available to make	EdR
We will call people according to the phone tree in the file a We will aslo communicate with local television and radio no		public of closures or relocations.					Edit
Version: 21.03.164		Copyright @ 2004 -	2021, BOLDplanning, Inc.,	All rights reserved.		Privacy Policy	Terms of Use

Figure: Review Pre-Loaded Information for Alert Notification Procedures

G	planning	Public Hea	ilth Department - Direct	or's Office, Admini	stration and Fin	nance - (COOP) - (153)	Your access le My Account - Instance: i-07		
Main Menu	General Info	Contacts	Manage Your Plan +	File Archive	Reports	Méssages	Administration	Logdut	
Alert No	tification Procedures	3							
				Add New Procedures					_
The Department Head w	III notify the Continuity Team Chief	to activate the continuity	y plan.						Edit
Upon notification to activ	vate the continuity plan, the Contins	uity Team Chief will perfo	orm the following duties:						
 For facility relate As needed, notify 	staff members identified within this d activations, notify the Alternate R v the local and/or state Emergency of ess of the notification process to the	acility Manager of the ap Operations Center that a	propriate alternate facility regardin	g the activation of the cont	nuity plan.	r in progress.			Edit
Once the continuity plan	is activated, the key staff members	s will contact their staffs	using the following procedures:						-
 Make a second al contact. 	ach person in his or her chain-of-co ttempt to contact those individuals	who were not initially ava	ailable. If this attempt is unsuccess	the Continuity Team Chief. sful, the key staff members	will leave a message, :	send a text, or use any other met	hod of communications available	e to make	Edit
 Report status of a 	cascade, including names of person	nel not contacted, to the	Continuity Team Chief.						
	ding to the phone tree in the file an							6	Edit
We will aslo communicat	e with local television and radio new	vs outlets to inform the p	public of closures or relocations.						
har									

Figure: Edit Alert Notification Procedures

3. Click on the "Edit" button to the right of each of these three phases of notification.

BDOLD	Public Health Department - Director's Office, Administration and Finance - (COOP) - (153)	Your access level is dev My Account - User Manager be i-07d7b2ed9f5962edd
Edit Procedure		
Alert Notification Procedure:		
45 B I U Ag• Stro • [Ξ Ε Ξ 4	答 환 重 🛔 🦓 Styles 🔹 🖄 记 🖾 🐨 🗇 🕅 🦘 여 🗓 Source 🚊	-
Upon notification to activate the continuity pla	an. the Continuity Team Chief will perform the following dulies:	Eat
· For facility related activations, notify th	ied within this annex, informing them of the current situation and that the continuity plan is being activated. he Allemate Facility Manager of the appropriate alternate facility regarding the activation of the continuity plan. Is Emergency Operations Center that an emergency activation or anticipated activation of the continuity plan is expected or in progress. scoreses to the Domartment Head	
		wallable to make
		Edd
	Save Cancel Delete	_
03.164	Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.	Privacy Policy Terms of Use

Figure: Adding Procedures to Alert Notification Procedures

- 4. Make any changes or additions to these procedures using the free-form fill-in boxes.
- 5. Click "Save."
- 6. Click the "Add New Procedure" button and enter the appropriate information.

ני	planning	Public Hea	Ith Department - Direc	tor's Office, Adminis	tration and Financ	e - (COOP) - (153)		evel is dev User Manager 7d7b2ed9f5962edd
Main Menu	General Info	Contacts	Manage Your Plan *	File Archive	Reports	Messages	Administration	Logaut
Alert Notif	ication Procedures	3 •		Add New Procedures				
Department Head will no	otify the Continuity Team Chief t	o activate the continuity	plan.					(
 Contact the key staff For facility related ad As needed, notify the 	tivations, notify the Alternate Fa	annex, informing them o cility Manager of the ap operations Center that ar	rm the following duties: f the current situation and that the propriate alternate facility regard a emergency activation or anticip	ing the activation of the contin	uity plan.	ogress.		(
Attempt to call each ; Make a second attem contact.	ctivated, the key staff members person in his or her chain-of-con pt to contact those individuals v ade, including names of person	nmand to relay the infor who were not initially ava	mation and guidance provided by illable. If this attempt is unsuccer	the Continuity Team Chief. ssful, the key staff members v	ill leave a message, send a	a text, or use any other metho	d of communications availab	le to make
	to the phone tree in the file arc th local television and radio new		ublic of closures or relocations.					(
n: 21.03.164				2021 BOI Delansing Tor A				Privacy Bolicy Te

Figure: Add New Procedures

Sample Report for Alert Notification Procedures

Following is a sample report for the alert notification procedures section of a plan. **SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT**

Alert Notification Procedures

The department head will notify the continuity team chief to activate the continuity plan.

Upon notification to activate the continuity plan, the continuity team chief will perform the following duties:

- Contact the key staff members identified within this annex, informing them of the current situation and that the continuity plan is being activated.
- For facility related activations, notify the alternate facility manager of the appropriate alternate facility regarding the activation of the continuity plan.
- As needed, notify the local and/or state emergency operations center that an emergency activation or anticipated activation of the continuity plan is expected or in progress.
- Report the progress of the notification process to the department head.

Once the continuity plan is activated, the key staff members will contact their staffs using the following procedures:

- Attempt to call each person in his or her chain-of-command to relay the information and guidance provided by the continuity team chief.
- Make a second attempt to contact those individuals who were not initially available. If this attempt is unsuccessful, the key staff members will leave a message, send a text, or use any other method of communications available to make contact.
- Report status of cascade, including names of personnel not contacted, to the continuity team chief.

We will call people according to the phone tree in the File Archive. We will also communicate with local television and radio news outlets to inform the public of closures or relocations.

Essential Resources

Overview

Essential resources are the important items your organization needs to operate. These may include software systems, maps, manuals, or very specialized equipment. Use the "Help" button in your plan on the Essential Resources screen to see additional details and examples of these essential resources.

You should always check to see if you can import essential resources from a master plan before trying to add a new essential resource. This may save you time.



Important: Several vital systems may have already been inputted for you to import. To make sure we include systems using consistent names, add essential resources using import first to see which systems have already been added to the enterprise system before you add any for your organization.

Adding an Essential Resource Using Import

1. Click on "Essential Resources" from the Main Menu.

-3 BOLD	Main Menu Department of Information Technology	- COOP - (147)			Welcome, Kay Your useman Your scean is My Account - I Instances - 94	e in Kayta. Val in dev
Man Menu 🔗 🦉	Actions • People	• Places +	Things •	View Plan	Administration	Logaut
Plan General Infe Essential Functions Poople Gontacts Deviolutions		View Matt BOLDgienning.com w also o "living pion". Using the buttens to t For security purposes.	ning com, your on-line source for es designed to create a standard) he laffe, you can navigate through heads to sure la can navigate through heads to sure la can navigate through please to sure la constant sure at <u>heads</u>	eed on-line planning environment each section of your COOP plan. mished with your session.	, that not only produces a hand o	
Places Facilities Security and Access Things Communications THE / Plan Membraums	Aiert Notification Procedures	So Kita				

Figure: Main Menu – Essential Resources

2. Click on the "Import Essential Resources" button near the middle of your screen.

	planning	Second Constant	Commissioner's Office - COOP - (36)			(And Sheeks)	Instance	att - User Manager : I-049992e4f6fe19f32 Hel
Hain Men Essent	tial Records/Resources	Actions =	People +	Places >	Things +	View Plan	Administration	Logout
			And Essential Present	Arport Essential Recents	Input Non Loud			
Filtered By: Defaul	t 🌱 Position: Contains 👻 Sear	ch / Filter:		\square				
Priority	Essential Record		Description					Details
#1	* Server Access		All fund account	information is kept on the web ar	is accessible by any internet	connection.		East Ver
#2	* Paynali Admin Files		Web based cafb	ware (ADP)				Entry Verm
#3	* Contracts		Contracts are u	eed to secure product and service	vendors for all types of services	8		Entra
#4	* Certificates of Authority		Provides proof o	f authority of all elected officials.	2			Est Ver
#5	* Commission Book of Assolutions		Provides basis o	f authority for all actions of comm	ission and mayor.			Cast View
#6	* Continuity of Operations Plan		Provides the ste	ps of how government operates d	uring a service disruption.			(East) Varia

Figure: Importing Essential Resources

4. Click in the box to the left of every essential resource you wish to import into your plan.



Figure: Importing Essential Resources

6. Click the "Import" button at the bottom of the screen.

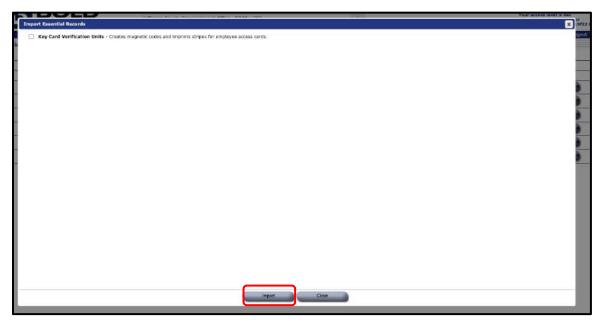


Figure: Importing Essential Resources

- 7. Check to see that all the imported essential resources are now in your list.
- 8. Click the "Edit/View" button to the right of each listed essential resource.

-8	BOLD		ecords/Resources ammissioner's Office - COOP - (36)				Your users Your scene My Account	ioyle McNahan. ene is Keyle. • level is dev • User Manager C4919ze4f5fs19f32 Help
Nain Menu	Part -	Actions =	People +	Places >	Things +	View Plan	Administration	Logout
Essential	Records/Resources 🥑 🖉		Add Essential Percent	(Input Essential Records)	Inguit turn Ex.ol			
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Priority	Essential Record		Description					Ostalla
#1	* Server Access		All fund account in	formation is kept on the web	and is accessible by any internet of	connection.		Call Ver
#2	* Asyrali Admin Files		Web based coftwa	re (ADP)				Est Ver
#3	* Contracts		Contracts are used	to secure product and servic	a vendors for all types of services			Entry Varia
*4	* Certificates of Authority		Provides proof of a	otherity of all elected efficiant	e ;			Entro
# 5	* Commission Book of Resolutions		Provides basis of a	uthority for all actions of com	mission and mayor.			Case Van
#6	* Continuity of Operations Plan		Provides the steps	of how government operates	during a service disruption.			Entry

Figure: To Edit/View Essential Resources

9. Check to see that the information about this essential resource is complete and accurate. To make any changes or additions to the information about these essential resources, see steps 4 through 8 below. If no changes are necessary, just click "Save."

Adding an Essential Resource Without Using Import

1. Click on the "Essential Resources" button on the Main Menu.

BOLD	Main Menu Department of Information	n Technology - Q3QP - (147)	2			Your memory Your scenes	yle McMahen. ne ie Kayla. level is dev User Manager 4979ba-466619733 Sielp
Man Menu Ban + 🚱	Actions +	People +	Places +	Things +	View Plan	Administration	Logout
Plan General Info Acctions Exertisal Functions People Certados Teams	Pile Archive Ordets at Succession	View Ran Dirkspetana of Authorit	BOLDgienning.com v also a "living plan". Using the buttons to For security purpose For comments or qu	ses designed to create a standard		t, that not only produces a hand	
Devolutions Places Facilities Security and Acouse Things Communications Exernitial Patentic, Resources	Alert Notification Procedures	Go Mits					

Figure: Adding Essential Resources Without Import

2. Click on the "Essential Resources" button near the middle of your screen.

- 2		ial Records/Resources urrey Cernmissioner's Office - COOP - (36)	Welcome, Koyle HCRAhen, Your wannowne in Kayle, Your account level in dev My Account - User Manager Instance: I-6409/2646/fs19122 Help
Nain Menu	Plan # Actions #	People + Places + Things +	View Plan Administration Logaut
Essential	Records/Resources 😗 🖉	And Essential Resort	
Filtered By: Default	Position: Contains Search / Filter:		
Priority	Essential Record	Description	Details
#1	* Server Access	All fund account information is kept on the web and is accessible by any internet connection.	Estive
#2	* Payral/Admin Files	Web based coffware (ADP)	Ext. Ver
#3	* Contracts	Contracts are used to secure product and service vendors for all types of services.	Entrop
*4	* Certificates of Authority	Provides proof of authority of all elected officials.	Emvin
# 5	* Commission Book of Assolutions	Provides basis of authority for all actions of commission and mayor.	Call Van
16	* Continuity of Operations Plan	Provides the steps of how government sperates during a service disruption.	(ETT.V and

Figure: Add New Essential Resources

3. Type in the name of the essential resource.

planning						User Manager 1979/se-1101e1917
Main Metu Fish + Essential Records/Resources	Actions + People >	Places =	Things +	View Plan	Administration	Logo
Essentiar Records/Resources	Name of Essential Record:		LE, Mar	ncy Payroll Database)		
	Essential Record Type:	Select	9			
	Describe this Essential Record; explain what it is an	d how it is used within your organi	zation.			
	₩ B Z U A+ fare + 15 15 (\$ (\$ 16	8 8 B Down . 5 B	BERMAN	Source n Y		
	L					
	Describe the process of how this Essential Record is					
	49 B I U Ap+ Sam + = E ≤ 4K E	※ 品 出 Styles ・ 当 論	日日のありの	Source 👜 🦞		
	5					
	Describe where this Essential Record is kept and pr	nuide details of what format is it be	and in			
	Primary Location: Please Choose	 Format: Please Choose 	w .			
	Backup Location: Please Choose	V Format: Please Choose	v			
	Remote Accessible: Yes O No O					
		and the second se				
	Review/Update Date: 🔤 📧 (mm/dd/yyy	(*)				
	Provide any additional information pertaining to thi	s Escential Record as necessary.				

Figure: Name of the Essential Resource

5. Use the first free-form data entry box to describe this essential resources by providing information about what it is and how it is used within your organization.

BOLD	Essential Records/Resources Jeffersen County Commissioner's Office - COOP - (26)					Welcome, Keyla Mo Yoar username is K Yoar access tevol is My Account - User I Instance: 1-045(Ste	ayla. dev Manager
Main Metu Plan +	Actions + People >	Places +	3	Things +	View Plan	Administration	Logait
Essential Records/Resources 🧭 🖗	Name of Essential Record: Essential Record Type:	Scient	٣		LE. (Agency Payroll Database)		
	Describe this Essential Record; explain what it is and he	w it is used wit	thin your organizatio	on.			
	₩ B Z U Art fare + 10 10 16 16 16 18	A B Date	· · 5 00 00		🖦 🧀 🗏 Source 🚡 🍟	12	
	Concrities the process of flow this Second II Second II pro- \mathcal{H} is $I \ \sqcup \ \mathcal{H}_{P^*}$ for $v \ \sqcup \ \boxminus \ \exists v \ u \ u$			a e M	n, n B Sacca 🛓 🦞		
	Provide a star with Economic Provider Land and an end			2			
	Describe where this Essential Record is kept and provid Primary Location: Press Choose	 Format: F 					
	Backup Location: Press Choose	Y Format: 9	Please Choose	¥			
	Remote Accessible: Yes 🔍 No 📿						
	Review/Update Date: 🧱 (mm/dd/yyyy)						
	Provide any additional information pertaining to this Es		1966 (COLOR 1977)				
	₩ B / U Ap+ 200 + [2 E = 4 (5 E 2	A III Shar	• •] 动略雄	a c m	n 🛪 🗟 Source 🚓 💡		

Figure: Describing Essential Resource

6. Use the second free-form data entry box to provide information about how this essential resource is protected, maintained, and by whom.

BOLD	Essential Record						Welcome, Kayla Your username Your access leve Ny Account - Us Instance I-049	is Kayla. el is dev
Main Menu Plan +	Actions >	People >	Places +	TT .	ings +	View Plan	Administration	Logaut
Essential Records/Resources								
	Name of Essential Record: Essential Record Type:		Select	۲	LE. (Agency	Payroll Database)		
	Describe this Essential Record;	explain what it is and how	r it is used within y	our organization.				
	W B I U Art fare +		B III Dales		E M I to at 181	Bource a v		
	Describe the process of how this	Essential Record is prote	ected, maintained,	and by whom.				
	HE B I U Ar Steve	Lt Kkee	a di Chebre			Source in a		
		1		Contract and and a				
	1							
	Describe where this Essential Re Primary Location: Please Choose		details of what for ~ Format: Please		*			
	Backup Location: Please Choose		 Format: Please 		v			
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	Review/Update Date:	(mm/dd/yyyy)						
	Provide any additional informati	ion pertaining to this Esse	ential Record as ne	CREARLY.				
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		NUMBER OF STREET, STREE						

Figure: Describing Protection/Maintenance of Essential Resource

7. Use the drop-down boxes to provide information where this essential resource is kept and provide details of what format is it kept in.

-B BOLD	Essential Records Jefferson County Commissioner						Your access My Account -	
Main Metu Plan +		People >	Places +	Things +	No.	ew Plan	Administration	Logout
Essential Records/Resources	Name of Essential Record: Essential Record Type		Scient	9]	LE. (Agency Payroll D	latabase)		
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	Provide any additional informatio	and which the state of the stat		10.00				
	₩ B I U Ap* Size + 1		By Shart +	O R R R R R	N A B Source	a 7		

Figure: Essential Resource Location and Format

8. Identify whether the essential resource can be accessed remotely, from an offsite location.

-B BOLD	Essential Records, Jefferson County Commissioner						Welcome, Kayl Tour usernania Your access les Ny Account - U Instance: 1-945	is Kayla. Is dev
Main Menu Pten +		People >	Places +		Things +	View Plan	Administration	Logaut
Essential Records/Resources	Name of Essential Record: Essential Record Type:		Select	٣		gency Payroll Database)		
	W B I U Art fare + 1					E Source		
	Describe the process of how this E				1 C B + +	Bauca 👗 🦞		
	Describe where this Essential Reco Primary Location: Proce Occor Revise Location: Proce Proce Remote Accessible: Yes One f Review/Vjorábe Date: Provide any additional information) (mm/dd/yyyy)	 Formati: Please Ch Formati: Please Ch 	1005E	*			
	₩ B I U A+ Star - 1	and the second second second second second		and the second	1 G M + +	🖻 Source 🚓 💡		

Figure: Remote Accessible

- 9. Use the free-form data entry box to provide any additional information pertaining to this essential resource, as necessary.
- 10. Click "Save."

Sample Report for Essential Resources

Following is a sample report for the essential resources section of a plan. Note that the report presents all the information entered into the essential resources section of the plan for each record.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

The following table identifies essential resources required by Springfield Public Works to complete essential functions:

IDENTIFY ESSENTIAL RESOURCES, SYSTEMS, AND DATA (PLEASE DESCRIBE IF NECESSARY)	PLANS FOR PROTECTION, DUPLICATION, AND MOVEMENT	LOCATION AND ACCESSIBILITY OF ESSENTIAL RESOURCES	ACCURACY AND CURRENCY OF RESOURCES
	OF RECORDS		(DATE)
Vital Record Name: Buildings	The document is	Primary Location:	Review /
Security Program (BSP)	kept in the	522 West 55th Street	Update Date:
System/Filename: The BSP incorporates specific security elements including perimeter security measures,	alternate building security coordinator's office. It is a living document that is	Format: Hard Copy Backup Location: City of Springfield Public Safety	06/15/2012

addressing the prevention and detection of the unauthorized entry, presence and movement of individuals and vehicles into and within secured areas, sterile areas, and buildings operations areas (BOA). It is the primary system regulating document between the City of Springfield and TSA.	reviewed and amended frequently.	106 W. Higgins Bldg. 76 Springfield, XX 55551 Format: Hard Copy – Paper Remote Accessible: Yes	
Vital Record Name: Personnel Files System/Filename:		Primary Location: 522 West 55th Street Format: Hard Copy Backup Location: City of Springfield Public Safety 106 W. Higgins Bldg. 76 Springfield, XX 55551 Format: Remote Accessible: No	Review / Update Date:

Drive-Away/Go Kits

Overview

The purpose of drive-away or go kits is to provide a plan to prepare a kit of essential items that would be ready to drive away with in case of an abrupt need to vacate your primary facility and/or to plan for exactly what would need to be taken to an alternate facility.

You will see that this section has already listed many suggested items for various types of drive-away/go kits: for administrators, budget/accounting, and for general personnel. You can just select and quantify items required from these lists, add new items to the lists, and add other types of kits as well.

Editing the Drive-Away/Go Kits

- 1. Click the "Drive-Away Kits (or Go Kits)" button on the Main Menu task button list.
- 2. Review the list of items for each kit.
- 3. Click on the "Edit" button to the right of the name of the kit you wish to edit.
- 4. Use the Category drop-down box to designate what kind of item it is (communications, forms, supplies, etc.).
- 5. Type in quantity, description, and comments to add any additional information about this item.
- 6. Click "Save." You will see that it will move to be listed with other items of the same category.
- 7. For items already included in the list, type in the required quantities and include comments for the next item you wish to include in the kit.
- 8. Click "Save."
- 9. Repeat steps 7 and 8 for each type of item to be included in the kit.
- 10. To remove unnecessary items from the list, click on the **red X** button to the right of that item.
- 11. Check to see that the list now appears as you wish it to be. Any items that you removed will no longer appear in this list.

Adding and Renaming the Drive-Away Kits

- 1. Click on the "Add Kit" button at the top of the Drive-Away Kits screen.
- 2. Type in the name for a new kit.

- 3. Select a category, quantity, and enter a description.
- 4. Click "Save."
- 5. To rename a kit, click "Edit" and type in the new name.
- 6. Click "Save."
- 7. Check to make sure the kits are now named as you wish them to be. If not, repeat steps 4 to 5.

Sample Report for Drive-Away Kits

Following is a sample report for the drive-away kits section of a plan.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

Admi	nistrator Drive-Away Kit	Quantities
Co	mmunication:	
1.	Television HD	5
2.	Radio HiFi	6
3.	Test items	6
Fo	ms:	
1.	List of headquarters personnel phone numbers	
2.	Contact numbers for legal staff	
Ot	ner:	
1.	Pots	6
Su	oplies:	
1.	Copy of plan	1
2.	Copy of emergency operations plan	1
3.	Office supplies	20
	Pens, pencils, stapler, etc.	

Budge	Budget/Accounting Drive-Away Kit			
For	Forms:			
1.	Copies of contracts/agreements			
2.	Purchasing manual			
3.	Property inventory listing			
4.	Safety manual			
Suj	Supplies:			
1.	Calculator			

2.	Stapler and extra staples	
3.	Letter-size folders and expandable files	
5.	Pens and pencils/pencil sharpener	
6.	Legal pads	
7.	Stationery/envelopes	

Communications

Overview

The Communications section allows you to list what modes of communication are used within your organization, whether it be internal, external, mobile, or secure forms. This section is also used to identify which modes must be arranged at an alternate facility. Considering what communications resources are available and required, it is critical for the operational success of your organization in a continuity event.

The methods listed should ensure continued communications with staff, supporting organizations, vendors, the public, and local media outlets.

You can reorder the list of communication resources by clicking your mouse on a line and moving it up and down in the list. Once you release your mouse, the screen will refresh with the new sort order.

Adding New Communications Resources

1. Start by clicking the "Communications" button on the Main Menu.

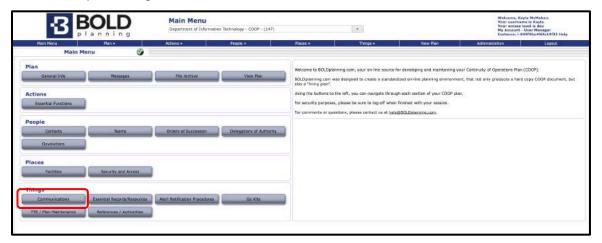


Figure: Main Menu – Communication

2. Click the box "Add New Communication."



Figure: Add new Communication

3. Type the name of communication (ex: SMS).

Main Nerro	Grocal Info		Contracto	Minuge Toor Flatt -	Ein Archwe	Feparin	Bringer	M Atteriological	ion Lingoil
Comm	unications	00							
				(aptrum c	ommunications (Indiat Com	TARGETER			
Priority		Comm	Communications				×		
			Name of Communic	cation:					
		l	Type: Quantity:	Select v Select v Internal Use Deternal Use Mobile Capability Secure	E + a B		_		
		I	Description:						
					ana 🔵 🤇 Car	-			

Figure: Name of Communication

4. To identify priority, select the drop-down arrow. Select high, medium, or low, depending on the importance of the communication.

Communications	Plain Hona	General Trife		Contacta	Manage Your Ban +	Film Archive	Reports	Messagen	Administration	Logouit
Privity Units Prisely: Quantity: Description: Description: Description:	Commun	ications	00		1000	e Cannuscation (amout Com	anotes)			
Priority: Select * Quantity: Feder High Une Hogh Une Description: Entropy of the selection	Priority		Comu	-				×		
				Priority: Type:	Select V Solicit Use High Hedum Low			_		
				Description:		Save: Cart	24			

Figure: Communication Priority

5. To identify type, select the drop-down arrow. Select voice, face-to-face, data, or other.

Nain Herse	General Info		Contine	Manage Your Hun >	Ellis Archive	Hoperton	Pression	Aminimition	Logout
Comm	unications	0.			at New Communication) (Ingot (Comunication			
Priority		Comm	Communications				×		
			Name of Comm Experim Quantify Description:	unication: Select V Salect V Voice Roc-to-Face Odra Other	my				
				-	Save	Carce			

Figure: Type of Communication

6. Type the quantity of the communication; for example, if your organization has 6 personal laptops, type a 6 in the box.

Matri Mense	General Train		Cyribits Ma	nuge toor Plant +	File Archive	Report	 Nimper	Administration	6	201
Commu	nications	00		Contrast Co	nnuskelan (incot.Con	mancadana				
Priority		Come	Communications				×			*
			Name of Communication Priority: Type: Quantity:	Select V Select V Internal Use Deternal Use Mobile Capability Secure B I U Ar	E * # #					
			Description:							
			1	<u> </u>	n Ca	-				

Figure: Communication Quantity

7. Identify if the form of communication is for internal use, external use, has mobile capability, and/or is secure, by clicking the boxes to the left. You may select more than one option.

Man Minis Grines Infin	Cwints Max	ign Toos Plant =	File Acchive	Reports	Himap	ee - 1	Administration	Engoil	
Communications 🖉 🖉		Gathan Com	nuncaturity (most Com	nuncucana)					
Priority Com	Communitations					×			- *
	Name of Communication. Priority: Type: Quantity:	Select V Select V Disternal Use Mobile Capability Secure) E * # #						
	Description:		- Can	w					
		Save		-					

Figure: Communication Safety

8. In the fillable box, type a description of your communication.

	Genteur Communication (Index Communication)	
rity Co	Communications Priority: Salet Type: Salet Quantity: Internal los Mode Capability Source # II U Ar Description:	
	Sare Carce	

Figure: Description of Communication

9. Click "Save."

Adding Communications by Importing

1. Click "Import Communications."



- Figure: Importing Communication
- 2. Click the boxes to the left of the communications you want to import, then click "Save."



Figure: Importing Communications Selections

3. Ensure the correct communications were imported to your plan.

Sample Report for Communications

Following is a sample report for the communications section of a plan.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

Communications

The ability to communicate with internal and external resources during events will be vital to the operations of the City of Springfield Public Works/Payroll. Internal and external resources could include City of Springfield Public Works/Payroll staff, partner organizations, emergency responders, vendors, the media, and/or the public.

The City of Springfield Public Works/Payroll has identified below the various modes of communication that currently exist and/or communications that must be arranged at an alternate facility. The communications are listed in order of priority and include a written description for each. Also, each communication item identifies whether the communication is for internal/external use, mobile, or if it requires any level of security measures.

Prior ity	Communication	Priority	
			Vi
			e
			W
#1	800MHz radios	High	/
			E
			di
			t
			Vi
			е
			W
#2	Cell Phones	High	/
			E
			di
			t
			Vi
			е
	Government Emergency Telecommunications		w
#3	Service (GETS)	High	/
	Service (GETS)		E
			di
			t
			Vi
			е
#4	Mobile Communications Center	High	w
		-	/
			E

			di t
			t Vi
			e w
#5	Fax Machine	Medium	/
			E
			di
			t
			Vi
			е
		b to all sure	W
#6	Facebook (Emergency Management)	Medium	/ E
			E di
			t
			Vi
			е
			w
#7	Twitter	Medium	/
			E
			di
			t
			Vi
			е
#8	Hard Line Phones	Low	W /
#0	Hara Lille Phones	Low	/ E
			di
			t
			Vi
			е
			W
#9	Ham Radio	Low	/
			E
			di
			t
			Vi e
			e w
#10	Warning Siren	High	/
	······································	9	, E
			di
			t

Security, Access Control, and Evacuation Procedures

Overview

The purpose of security, access control, and evacuation procedures is to identify the physical and systems access controls for each of your primary and alternate facilities. Any organization requiring access controls for operations at its primary facilities should also have equivalent access controls for its operations at an alternate facility.

This is also the place to identify communications and information systems available and evacuation procedures for each facility.

Note that since this information is generally the same for each individual facility, regardless of whose plan may use that specific facility; this information may be provided from a master database. In that case, you would not need to edit this section of your plan.

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.

Editing the Security and Access Control Information

1. Click the "Security and Access" button on the Main Menu.

-B BOLD	Main Menu Department of Information	tion Technology - CDOP - (147)	2			Your usernar Your access	
Miin Minu Nin Main Menu	Actians =	People +	Places +	Trings +	View Plan	Administration	Loosut
Plan Plan General Inte Meccapes Actions Exection s Pacple Centrats Develutors Develutors	File Archive Orders of Succession	View Nan	BOLDplenning.com w also a "living plan". Using the buttons to For security purpose For comments or que	es designed to create a standard		it, that not only produces a hard	
Places Facilities Server by and Acoma Things Communications Essential Internet/Resources TTE / Plan Membranes References / Autombes	Aart Notfeatins Procedures	Ga Kita					

Figure: Main Menu – Security and Access

2. For each facility listed, click on the "Edit" button to the right of that facility.



Figure: Editing Facilities Under Security, Access & Evacuation

Planning	Public Health Department - Emergency Preparedness and Response - (COOP) - (154)	Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f5962e
fain Menu General Info	Contacts Manage Your Plan * File Archive Reports Messages	Administration Logout
Security, Access & Evacuation	Ø 0	
	Access Controls / Physical Access:	
	李 B / U Ar- Stee ・ 注 任 体 体 単 ▲ ▲ Styles ・	
	3 😥 📰 🗔 🤤 🕅 🔨 🖉 Source 🛓	
	Access is controlled by standard departmental RF ID Keycard / ID Badge.	
	Communications and Information Systems Security / Cyber Security:	
	🖑 B I U Ae+ Stor + ⊟ ⊟ 🖷 🕮 🖹 🚔 🦓 Styles →	
	5. 😂 🗃 🚍 🥰 🕅 🤸 🖉 Source 🚔	
	Computer systems are accessed using departmental user ID and password.	
	Evacuation Procedures:	
	巻 B J U Ap+ Stro + 注目日 小田 部 副 単 晶 晶 Styles →	
	5 😂 🧰 🗂 🥽 📕 🦘 🍺 🗟 Source 🚔	
	Evacuation procedures are located near all exits. A copy is also loaded in the file archive section of this plan.	
03.164	Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.	Privacy Policy

Figure: Describing Security, Access & Evacuation

- 3. Use the free-form fill-in boxes to describe:
 - Access controls/physical access
 - Communications and information systems security/cybersecurity
 - Evacuation procedures
- 4. Click "Save."
- 5. Check to make sure that the descriptions are as you wish. To make any changes, click on the "Edit" button, again and save your changes.

Sample Report for Security Access and Control

Following is a sample report for the security access and control section of a plan. **SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT**

Security and Access Controls for Public Health Department - Emergency Preparedness and Response

SECURITY & ACCESS CONTROLS

The following security and access control measures are in place to restrict access to the facility to employees and critical customers:

- Primary facility
 - o Data Center -
 - Access is controlled by standard departmental RF ID keycard/ID badge.
 - Public Health Department Headquarters -
 - Access is controlled by standard departmental RF ID keycard/ID badge.
- Alternate facility
 - Data Center -
 - Access is controlled by standard departmental RF ID keycard/ID badge.
 - Public Health Department Headquarters -
 - Access is controlled by standard departmental RF ID keycard/ID badge.
 - Southside WIC Nutrition Center -
 - Access is controlled by standard departmental RF ID keycard/ID badge.

COMMUNICATIONS AND INFORMATION SYSTEMS / CYBER SECURITY

The following measures are in place to send and receive secure communications from the facility, as well as information systems and cyber security measures:

- Primary facility
 - o Data Center -
 - Computer systems are accessed using departmental user ID and password.
 - Public Health Department Headquarters -
 - Computer systems are accessed using departmental user ID and password.
- Alternate facility
 - Data Center -
 - Computer systems are accessed using departmental user ID and password.
 - Public Health Department Headquarters -
 - Computer systems are accessed using departmental user ID and password.
 - Southside WIC Nutrition Center -
 - Computer systems are accessed using departmental user ID and password.

Test, Training, Exercising (TTE) and Plan Maintenance

Overview

The purpose of training, testing, exercising, and plan maintenance is to help assure that your plan is completed and updated in a timely manner. This also helps you schedule reviews of the plan by your planning team on a regular basis. The kind of activities you should schedule and track here are:

- Training
- Plan maintenance
- Tabletop exercise
- Functional exercise
- Full-scale exercise
- Continuity event/activation
- Other

See the "Help" button in this section for additional information about training, testing, and plan maintenance.

Adding or Editing TTE/Plan Maintenance

Note that on the main screen for TTE/Plan Maintenance you have an option to allow yourself to be reminded to update your plan on a regular basis.

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. This cheat sheet will guide you through updating the Test, Training, and Exercise module of your system.

1. 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.

ent Type: ent Status:	03/28/2019 Cmm/dd/yyyy) Send Reminder: Plan Maintenance Completed Dan Maintenance L5 (Annual Table Tap Supple)
ent Title:	Plan Maintenance / Updates I.E. (Annual Table Top Exercise)
A≸ B I U	Please describe this TTE / Plan Maintenance Event
1000	oved retired staff. d new staff with relevance to the plan.
100.000	ders of Succession and Delegations of Authority due to staff turnover.
Updated Or	ders of Succession and Delegations of Authority due to staff turnover.
Updated Or	

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.

·B	BOLD	Your user Your acce My Acces	, Standard Demo User, mame is STD - Demo. (ess level is Plan User nt i-07d7b2ed9f5962ede					
Main Menu	General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages Adr	ninistration L	ogout
	ITE / Plan Mainten	ance 🤪		Add Event		Remind me to up	date my plan every:	Month
Date	Event Title			ivent Type	Status	Create Date	Send Reminder?	
6/12/2019	Continuity of Operations 1	ableTop Exercise	т	able Top Exercise	Completed	10/23/2019	Yes	Edit
5/15/2019	Planning Team Meeting		c	Other	Completed	10/23/2019	Yes	Edit
4/17/2019	Planning Team Meeting		c	Ither	Completed	10/23/2019	Yes	Edit
3/28/2019	Plan Maintenance / Updat	es	p	lan Maintenance	Completed	03/28/2019	No	Edit
					Completed	10/23/2019	Yes	Edit

Figure: List of TTE/Plan Maintenance Events

Sample Report for TTE/Plan Maintenance

Following is a sample report for the TTE/plan maintenance section of a plan.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

ANNEX M

TEST, TRAINING, AND EXERCISE

- This plan will be reviewed annually by all continuity planning team members and approved by the deputy commissioner.
- The deputy commissioner will ensure training of all 2FM architecture, construction, & security employees on the key aspects of this plan. This training will be conducted at new employee orientation and quarterly staff meetings.
- This plan will be practiced annually by use of a tabletop exercise or a field exercise.
- Support plans and communications equipment at the alternate facility will be tested annually as part of the test, training, and exercise (TT&E).
- Equipment pre-positioned at the alternate facility will be tested annually as part of the TT&E program.
- The exercise will include a test of the alert and notification procedures within this plan, with and without warning, during duty and non-duty hours.
- The deputy commissioner or designee will identify, and incorporate lessons learned and remedial actions from exercises into annual revisions of the continuity plan.

The 2FM – architecture, construction, & security documents the past, present, and future events that support test, training, and exercise program for their continuity plan. These events are documented below in chronological order starting with the most recent:

Event Title: Overview for 2FM Event Date: 10/04/2011 Event Type: Training Event Status: Completed

Description: Introductory Training

Event Title: Plan Finalization Walk-Through

Event Date: 6/15/2011 Event Type: Plan Maintenance Event Status: Completed

Description:

Event Title: Initial Training Event Date: 3/09/2011 Event Type: Training Event Status: Completed

Description:

Full-day training on continuity planning at ABC Building for the 4 departments in the first group (police, fire, public health, and aviation). This training is for technical assistance and data entry for the <u>xxx</u>. Springfield.com system.

Contacts Database

Overview

Your contacts database contains names, addresses, and contact information for all your key staff, staff in other departments, organizations, or vendors with whom you interact on a regular basis or who may be critical in times of a work disruption. It will also contain the names of all staff who are members of the various continuity planning teams. Do not forget to include your IT contact as well as the relevant facility manager(s).

Add three ways to contact everyone in case of an emergency. Remember, you may need to reach someone quickly during an emergency, and many emergencies do **not** occur during regular business hours. Consider adding personal phone numbers and emails in case organizational phone systems/emails are down.

Unless your organization is small, you do not need to add the names of all the people in your organization. Staff rosters (usually in MS Word or MS Excel format) can be attached to your plan using the File Archive section.

This is the ONLY section in which you can add contacts into your plan. But you can always return to this section later to add more people.

The following steps should be taken to add a contact:

Adding Contact Using Import

- 1. Start by clicking the "Contacts" button on the Main Menu.
- 2. Click on "Import Contacts" button. (Pictured below.)
- Select the boxes to the left of any names listed that are contacts for your organization. Be sure to <u>look through the entire list</u>. Some people may be listed near the bottom of the list in a sub-group.
- 4. Click on the "Import Contacts" button.
- 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. (See sections 9.3 and 9.4.)

Main Men	i General	Info Con	tacts Manage You	r Plan > File Archive	Reports	Messages	Administration	Logout
	Contacts	00						
	Add Contact Department Datron	City Man. - Roberts - Davis, I Legal Sta - Ester, S Mayors 0	eon, Chase - Daputy Administrator etary Marie - Manaper iff Sandra - Manaper					
	SytOxisses Import Contacts	Emerg Babbet Taimad	Jency Management n, Oliver - EM Coordinator ge, Byron - Director					
	Backport Contacts		nation Technology Richael - Assistant Program Manager					
		Informat * Waters	tion Security . Chris - Division Hanager					
		Operation * Sander	ns s, Janifer - Program Manager					
		Technolo * Brown	gy Hunter - Manager					

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 dropdown 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.
- 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.

Main Menu	General Info	Contacts	Manage Your Plan >	File Ard	hive	Reports	Messages	Administration	Logout
Address, Ph	none, Email								
		Contact Deta	ils						
		Member Type* First Name	Select 👻	Department Division			*		
		Niddle Name		SubDivision			1000		
		Last Name		Title					
		Location Quick Pick	Select		- H	ome Number			
		Address			W	/ork Number	Ext		
						ell Number			
		City				ax Number dditional Number			
		State	Select 👻			dditional Number			
		21P Code			w	/ork Email			
			₩ B I U A+ E	4040 <u>8</u>	P	ersonal Email			
					_				
		Comments							
			1		_				
			(Sara	Cano	ol			

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.

-B BOLD	Contacts Jefferson County Comm	nissioner's Office - COOP - (36)		1000		Weikieme, Kar Your usernaan Your access i My Accessit - Instance: i-0-	m in Kayla.
n Heru Plan > Contacts	Actions *	Pospit +	Faces >	Taings •	Wew Plan	Administration	Lagost
Rearch regot Curstads Am Corean Departmen 2 Strat Tana Regot Ran Ease	Office of the County * Jamon, Amada - Olha He Courts Read of Counsilead * County Read of Counsilead * Status, R. Maul - Beerder * Mitheway, B. M. Maul - Beerder * Mitheway, B. M. Mark, Beerder * Mitheway, B. M. Mark, Beerder * Mitheway, B. M. Mark, Beerder * Mitheway, Baser, - County Mark, * Cassiy, Aster Annuals * Cassiy, Aster Annuals * Mitheway, Castr Annuals * Beed, B. J. Devetor	Near Control of Contro	lssioners				

Figure: Selecting a Contact

Note: Name: Address: Page::::::::::::::::::::::::::::::::::::	ome, Kayla NcMaham. Luoroann is Kayla. access level is dov mari - User Manager nor i-049/9be4/66119732 He	Your user					ation eners Office - COOP - (36)	Contact Infor Jefferson County Comm	D	-B BOL
Contact Details Mender type* Hond Name Location Quick lick Address 20 Plan Street Title Office of the County Executive & Connessones Location Quick lick Address 20 Plan Street Type Very Number State 21P Code 2760- Werk Email Comments	Legout	Administration	View Plan		Things +	iciti +	Pospie =	Actiona +		
First Kane Ansards Dividies Image: Comparison of the state of the								nils	Contact Deta	
First Kane Ansards Dividies Image: Comparison of the state of the				riens	Executive & Commissio	Office of the County	Department	~	Nember Type* Staff	
Last Nete Lasson Location Quick Dick Address Address Di Plan Street Di Verch Namber State Timestee Verch Namber Additional Number ZIP Code Timestee V State State Timestee V State S										
Location Quick Pick Address Address Address D3 Ruen Street D3 Ruen						Office Manager			Middle Name	
Address 20 Run Street Work Runber 21-467-4173 Ex Cell Number 21-467-4230 21-468-4200 21-468-42000 21-468-42000000000000000000000000000000000000								on	Last frame Laws	
Address 20 Run Street Work Runber 21-467-4173 Ex Cell Number 21-467-4230 21-468-4200 21-468-42000 21-468-42000000000000000000000000000000000000						Home Number		Administrative Complex	Location Quick Pick	
Comments				Ext	615-647-2123	Work Number		350 Marn Street	Address	
City Daylottam Additional Number State Devision Work Small ZIP Code 27/59 Work Small Comments Mark Small					931-988-6238	Cell Number				
State Torresson ZIP Code 7769 Work Enail Contacts Custom 1										
ZIP Code 17269 Wrok Family Schools gav @ B / U Ar E ← A R Source A Context Examt Connects						Additional Number				
Comments					strange Conflicte on	West Frenk				
Contacts Custom 1					and the second participant		and the second		All Gran	
						Contacts Custom 1	+ + B souce B	·* 8 / U ·*·		
Bere Datas Canad Resource Ride									Comments	
Bore Databa Canad Ressour Robe										
Berry Databa Carrait Reason Ribe										
Barre Datas Carcal Resauge Roke										
					Resadige Robe	Eancal	Bers Dutate			
				~						
			 • 							

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.'

BOL	D	Contact Informa Jefferion Causty Commission					Walansen, K Your users Ny Account Instarrow i	ayla McNohan In Kayla Isaal Is day - Usar Managar 04975be4Kfs111733 You
Address, Phone, Email		Adland #	Paper -	F009 >	-Things -	Vesilari	14000000000	and the second
	Contact Deta	ails						
	Hember Type* Staf First Name Ama Hiddle Name Law	nda	Department Division Title	Office at the Dearby Eve Office Manager	ciAlve & Commissioners			
	Location Quick Pick Address	Reasign Contect Roles		Turner 1				
	City Statu ZIP Code	Roles Schert All General Info Criders of Succession Person Being Unassigne	Delegations of Authority Essential Punctions	Fedities Reaning Partners Person Receiving New	C Teoris			
	Commente	Lawson, Amanda - Office Office of the Courty Execut	Manager Ne & Commissioners	Unassigned Person				
		<u></u>						
		-	fere Dette		Aleman Rose			

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.

Main Henu	General Info	Contacts	Manage Your Plan +	File Arch	ive	Reports	Hessages	Administration	Logaut
Address, P	hone, Email								
		Contact Deta Member Type* First Name Last Name	Vendor/Other 🗸	Vendor/Company* Title Product/Service					*
		Planning Partner Location Quick Pick Address City State ZIP Code Comments	-Said- Select • (* 8 / 11 //* E =	Contract Number	Cell N Fax N Addit Addit Work	Number Iumber amber ional Number Emeil mal Email	Ext		
			(- Save -) (Cancel.				

Figure: Adding a Vendor to Your Contacts database

Sample Report for the Contacts Database

Following is a sample report (contacts roster) from the contacts database. Note that it first presents key staff, the staff, then non-staff, and finally, vendor/other. These are the four member types.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT City of Springfield - Department of Public Works - Administration -H R Contacts Roster

KEY STAFF	TITLE/AREA OF RESPONSIBILITY	TEAM ROLES	PHONE NUMBE RS	EMAIL ADDRESS
Richard Abblet	Deputy Commissioner - Finance/Budget/V oucher	Reloca tion Team		
Jane Crowley	Administrative Services Officer II/Human Resources	Suppor t Team		
Bridget Gardner	Continuity Planning Project Manager		Work: 555- 663- 1234	Gardner@cityofspringfield. org
Arnold Milton	Managing Deputy Commissioner HR/IT Telecom/IT/Teleco m		Work: 555- 123- 2897 Home: 555- 567- 8976 Cell: 555- 678- 0987	

	TITLE/AREA OF	TEAM	PHONE	
STAFF	RESPONSIBILITY	ROLES	NUMBE	EMAIL ADDRESS

		RS	
William T Bacon	Building Manager/Facilities	Work: 555- 234- 1234	
William Francis Sanders	Assistant Commissioner/Hu man Resources	Work: 555- 123- 3456 Cell: 555- 123- 8976	Sanders@ex.cityofsprimgfi eld.org

NON-STAFF	TITLE/AREA OF RESPONSIBILITY	TEAM ROLES	PHONE NUMBE RS	EMAIL ADDRESS
Thomas Test	Liaison to Executive Office		Cell: 555- 123- 9087	

VENDOR/OTHER	TITLE/AREA OF RESPONSIBILITY	TEAM ROLES	PHONE NUMBE RS	EMAIL ADDRESS
			Cell:	
Harold White	Springfield Systems, Inc.		555-	
			123-	
			5612	

Hazards/Risk Assessment

Overview

The purpose of the hazards/risk assessment section of your plan is to identify the various types of events that could occur and potentially impact your organization's ability to operate. Look at the "Help" button in this section of the plan for more information about how to address this section.

Note that some organizations may choose not to utilize this section of the plan. In this case, this button may not appear on your Main Menu button list.

Editing Hazards/Risk Assessment Using Import

1. Click on the "Hazards/Risk Assessment" button on the Main Menu button list.



Figure: Main Menu – Hazards/Risk Assessment

2. Click on the "Import Hazards/Risks" button.

	Hazards / Risk Assessment 🥥	Add Hazard / Risk	
Priority	Risk	Risk Rating	
81	Man-Made Physical Disruption	1.75 - Low	View / Edit Action List
#2	Earthquake	1.55 - Low	View / Edit Action List
83	Dam or Levee Failure	1.9 - Low	View / Edit Action List
84	Hazardous Materials Incident (HAZMAT)	3.3 - Noderate	View / Edit Action List
#5	Volcanic Eruption	3.3 - Hoderate	View / Esit Action List
8 6	Pandemic Event	3.9 - Hoderato	View / Edit Action List
#7	Tornado	2,05 - Huderate	View / Edit Action List
#7	Riverine Flood	2.55 - Moderate	View / Edit Action List
#8	Extreme Weather - Winter Storm	3.55 - High	View / Edit Action List
e 9	Extreme Weather - High Temperature	2.5 - Hodenate	View / Edit Action List
#9	Power Outage	3.5 - High	View / Edit Action List
ø11	Severe Thunderstorms	2.35 - Moderate	View / Edit Action List

Figure: Import Hazards/Risks

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

planning	Emergency	Management Demo - (COOP) - (149)			Your access My Account Instance: i-	level is dev - User Manager 07d7b2ed9f5962edd
Main Menu General Info	Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
Hazards / Risk Assessment	9		View all Hazards/ Risks				_
Risk			Risk Rating			Import Selected Risks	Select All Risks
ire			3.4 - High				
an-Made Technological Disruption			3.9 - High				
lurricane			2.55 - Moderate				0
/ildfire			2.7 - Moderate				
lash Flooding			2.65 - Moderate				

Figure: Select boxes; Import Selected Risks

- 5. Click on the "View/Edit" button.
- 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.
- 8. Click "Save."

	in Menu General Info Hazards / Risk Assessment	Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
			Add Haza	rd / Risk Import Hazards	s / Risks			
riority	Risk			Risk Rating	1			
11	Man-Made Physical Disruption			1.75 - Low			View / Edit	Action List
2	Earthquake			1.55 - Low			View / Edit	Action List
13	Dam or Levee Failure			1.9 - Low			View / Edit	Acton List
4	Hazardous Materials Incident (HAZMAT	3		3.3 - Hoder	ate		View / Edit	Action List
15	Volcanic Eruption			2.3 - Noder	ate		View / Edit	Action List
16	Pandemic Event			2.9 - Moder	ate		View / Edit	Action List
7	Tornado			2,05 - Muda	erate		View / Edit	Action List
17	Riverine Flood			2.55 - Mode	erate		View / Edit	Action List
8	Extreme Weather - Winter Storm			3.55 - High	R:		View / Edit	Action List
19	Extreme Weather - High Temperature			2,5 - Hoder	ate		View / Edit	Action List
9	Power Outage			3.5 - High			View / Edit	Action List
11	Severe Thunderstorms			2.35 - Mode	arate		View / Edit	Action List

Figure: View/Edit a Hazard

Hazards / Risk Assessmen	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logout
Hazarus / Kisk Assessiller		(View all Hezords/ Risks				
Risk Name:	Man-Made Physical Disrup	otion	Risk Type: Man-M	ade Risk 🛩			
	₩ B I U Ar+]Ξ	E + + E = = A A S	ytes - 🖄 🛍 🛙		j Source 🚔		
	operational disruption. I	d threats. It does not matter if pers None of these events have to take to cause secondary hazards, and long	place at a worksite to c	reate a disruption.		070	
	∜ в / ⊔ № - ≘	E 💷 🛎 🗉 📓 🖓 🛛 s	lylos · 🕄 🔯 🛙	■ 🖬 🖶 💌 🗠 🔶 []	g Source 🚔		
Potential Impact of Event including financial costs	regardless of whether the	n man-made disruptions takes are g hey were the target or not. The ran productivity and sense of well-bring	ge of impact from a thr	eat can range to the lost pr	oductivity and emotional we	all-being of an individual to an	
Probability:*	1 - Unlikely 👻	Warning	Time:*	4 - Less	Than 6 Hours 🛩		
Magnitude / Severity:* * Required	2 • Limited 💙	Duratio	n:*	1 - Less	Than 6 Hours 🌱		
		Save	Cancel	Delete			

Figure: Edit the Information About a Hazard

Editing Hazards/Risk Assessment Without Using Import

1. Click on the "Hazards/Risk Assessment" button on the Main Menu button list.

Main Menu Main	Hartin Menu 🥝	Actors #	Pospie a	Plates +	Things +	View Han	Administration	Logost
Plan General Info	Messages	File Archive	Vex Par			r developing and maintaining you and on-line planning environment		
Hazarda / Rick Assocstruct	Excertial Purctians			For security purposes,	w left, you can navigate throug please be sure to log-off when f tions, please contact us at <u>helod</u>			
People Contexts Devolutions	Teams	Orders of Succession	Delegations of Authority					
Places Facilities	Security and Access							
Things Communications TTE / Plan Maintenance	Essential Records'Resources	Alert Notification Procedures	Go Kits	2				

Figure: Main Menu – Hazards/Risk Assessment

2. Click on the "Add Hazard/Risk" button.

Princip Risk Rating Princip Risk Rating Princip NanMade Physical Disruption 1.75 - Low Princip Risk Rating 1.75 - Low Princip Earthquake 1.55 - Low Dam or Levee Failure 1.55 - Low Ninw / Est Action List 1.55 - Low Ninw / Est Hazardous Materials Incident (MAZMAT) 1.9 - Low Ninw / Est View / Est Action List 1.55 - Low View / Est Action List Action List View / Est Action List 1.9 - Low View / Est Action List 1.55 - Hoderats View / Est Action List 1.55 - Hoderats View / Est Action List 1.55 - Hoderats View / Est Action List		Hazards / Risk Assessment	Add Hazar	rd / Risk Import Hazards	/ Dista		
11 Man-Made Physical Disruption 1.75 - Low View / Est Action Litk 12 Earthquake 1.55 - Low View / Est Action Litk 12 Dam or Levee Failure 1.9 - Low View / Est Action Litk 13 Dam or Levee Failure 1.9 - Low View / Est Action Litk 14 Hazardous Materials Incident (HAZHAT) 5.3 - Moderate View / Est Action Litk 155 Volcanic Eruption 1.3 - Moderate View / Est Action Litk 156 Pandemic Event 1.9 - Hoderate View / Est Action Litk 157 Tornado 1.9 - Hoderate View / Est Action Litk 157 Riverine Flood 2.9 - Hoderate View / Est Action Litk 157 Riverine Flood 2.9 - Hoderate View / Est Action Litk 157 Riverine Flood 2.9 - Hoderate View / Est Action Litk 158 Extreme Weather - Winter Storm 3.9 - Hojerate View / Est Action Litk 159 Extreme Weather - High Temperature 2.5 - Hoderate View / Est Action Litk <t< th=""><th>c</th><th></th><th></th><th></th><th></th><th></th><th></th></t<>	c						
Name Marken Name Marken 22 Earthquake 155 - Low 23 Dam or Lewee Failure 155 - Low 24 Hazardous Haterials Incident (HAZMAT) 159 - Low 25 Volkanic Eruption 25 - Hoderata 26 Pandemic Event 25 - Hoderata 27 Kolenski Eruption 25 - Hoderata 28 Volkanic Eruption 26 - Hoderata 29 Riverine Flood 268 - Hoderata 20 Kolensker - Winter Storm 268 - Hoderata 29 Extreme Weather - Winter Storm 255 - Hoderata 29 Power Outsge 35 - High	Priority			Risk Rating			
Antopic Antopic 23 Dam or Laves Failure 23 Dam or Laves Failure 24 Hazardous Haterials Incident (HAZHAT) 25 Volcanic Eruption 25 Volcanic Eruption 26 Pandemic Event 26 Pandemic Event 27 Tornado 208 Haderials 27 Riverine Flood 28 Extreme Weather - Winter Storm 29 Extreme Weather - High Temperature 25 Floderats 26 Power Outsge 27 New Outsge 28 Extreme Weather - High Temperature 29 Power Outsge 20 Schlight	01	Man-Made Physical Disruption	 	1.75 - Low		 View / Edit	Action List
Hazardous Haterials Incident (HAZHAT) 2.3 - Hoderate View / Edt Action List PS Volcanic Eruption 2.3 - Hoderate View / Edt Action List PS Pandemic Event 2.9 - Hoderate View / Edt Action List Pandemic Event 2.9 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.0 - Hoderate View / Edt Action List Promotion 2.5 - Hoderate View / Edt Action List Promotion 2.5 - Hoderate View / Edt Action List Promotion 2.5	#2	Earthquake		1.55 - Low		View / Edit	Action List
National Induction National Induction (Nacional Induction))) View / Edit Actional Lint 100 Extreme Weather - Winter Storm S.55 - High S.55 - High Waw / Edit Actional Lint 101 Extreme Weather - High Temperature S.5 - High S.55 - High Waw / Edit Actional Lint 102 Prover Outage S.5 - High S.5 - High Waw / Edit Actional Lint	83	Dam or Levee Failure		1.9 - Low		View / Edit	Action List
Noticity Noticity Pandemic Event 12 + Noderate Pandemic Event 12 + Noderate Pandemic Event 12 + Noderate Pandemic Event 2.05 - Moderate Pandemic Event 3.05 - Moderate Pandemic Event 3.05 - Moderate Pandemic Event 3.05 - Mighrate	Ø-4	Hazardous Materials Incident (HAZMAT)		3.3 - Noder	ata	View / Edit	Action List
File File 77 Tornado 78 Riverine Flood 79 Riverine Flood 78 Extreme Weather - Winter Storm 79 Extreme Weather - Winter Storm 79 Extreme Weather - High Temperature 79 Power Outsge	#5	Volcanic Eruption		2.3 - Noder	ato	View/Edit	Action List
Number Number P7 Riverine Flood P3 Riverine Flood P4 Extreme Weather - Winter Storm P3 Extreme Weather - High Temperature P3 Power Outsge P3 Power Outsge	86	Pandemic Event		2.9 - Hoden	ate	View / Edit	Action List
138 Extreme Weather - Winter Storm 3.55 - High View / Edit Action List 139 Extreme Weather - High Temperature 2.5 - Rederate View / Edit Action List 139 Power Outsge 3.5 - High View / Edit Action List	#7	Tornado		2,05 - Mode	rate	View / Edit	Action List
199 Extreme Weather - High Temperature 2.5 - Hoderatia View / Edit Action List 199 Power Outsge 3.5 - High View / Edit Action List	#7	Riverine Flood		2.55 - Mode	rate	View / Edit	Action List
19 Power Outsge 3.5 - High Action List	#8	Extreme Weather - Winter Storm		3.55 - High	8	View / Edit	Action List
	8 9	Extreme Weather - High Temperature		2.5 - Noden	ate	View / Edit	Action List
Severe Thunderstorms 2.33 - Moderate View / Edit Action List	#9	Power Outage		3.5 - High		View / Edit	Action List
	Ø11	Severe Thunderstorms		2.35 - Mode	rate	View / Edit	Action List

Figure: Add Hazard/Risk

- 3. Complete the information required in the drop-down and free-form fill-in boxes.
- 4. Click "Save."

		Management Demo - (COOP) - (149)		Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f5962ed
fain Menu General Info	Contacts	Manage Your Plan . File Archive	Reports Messages	Administration Logout
Hazards / Risk Assessme	nt 🎱			
		View all Hezants/ Risks		
Risk Name:		Risk Type: Selec	t 👻	
	≪ B / U Ar ∃	E 🕼 🎟 E 🖻 🙆 🖓 Styles 🔹 🖏 🕲	📑 🗂 🚝 💌 🚓 🤿 🗑 Source 🔒	
Risk Description:				
	ώ Β I Ū ↔. i= :	E 🗉 🏽 🗮 🤮 🖓 Styles 🔹 🖏 🔯	🖾 🖽 🔁 🦛 🦛 🖉 Source 🚘	
Potential Impact of Event	t			
including financial costs				
Probability:*	Select 👻	Warning Time:*	Select 👻	
Magnitude / Severity:*	Select ¥	Duration:*	Select 🗸	
* Required	đ			
		Save Ca		
		Save La		
.03.164		Copyright @ 2004 - 2021, BOLDplanning, Inc.	All rights reserved	Privacy Policy T

Figure: Editing Information About a Hazard

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

#1 Failer function Failer function #2 Earthquake 1.55 - Low #3 Dam or Levee Failure 1.9 - Low	View / Edit View / Edit View / Edit	Action List Action List
#1 Man-Made Physical Disruption 1.75 - Low #2 Earthquake 1.55 - Low #3 Dam or Levee Failure 1.9 - Low	View / Edit	
Parthquake 1.55 - Low Parthquake 1.55 - Low Parthquake 1.9 - Low	View / Edit	
est Damon Levee Failure 1.9 - Low		Action List
	View / Edit	
84 Hazardous Materials Incident (HAZMAT) 2.3 - Haderata		Action List
	View / Edit	Action List
e5 Volcanic Eruption 2.3 - Hoderate	View / Edit	Action List
66 Pandemic Event 2.9 - Hoderate	View / Edit	Action List
#7 Tornado 2.05 - Moderate	View / Edit	Action List
87 Riverine Flood 2.55 - Moderate	View / Edit	Action List
#8 Extreme Weather - Winter Storm 3.55 - High	View / Edit	Action List
99 Extreme Weather - High Temperature 2,5 - Hodenate	View / Edit	Action List
#9 Power Outage 3.5 - High	View / Edit	Action List
	View / Edit	Action List
#11 Severe Thunderstorms 2.35 - Moderate		

Figure: To Add New Action – Action List

5	Planning Emergency Management Demo - (COOP) - (149)	Your access level is dev My Account - User Manager Instance: I-07d7b2ed9f5962edd
Main Menu	General Info Contacts Manage Your Plan + File Archive Reports Messages Admini	nistration Logout
Hazar	ards / Risk Assessment	
Preparedne	ess (Pre-Event) Actions for Man-Made Physical Disruption	18 Sert Actions
	Action	
F1	Develop a communication plan/phone tree for key staff and management within the organization	Edt Delute
#2	Install a physical security system	Edit Delete
#3	Inspect emergency back up power sources/regulators for utilities.	Edt Delete
£4	Train personnel in detecting and reporting procedures for bomb threats	Edt Delete
¢5	Identify emergency evacuation routes from facility	Edit
16	Ersure each employee has prepared an individual, seasonally-appropriate 72-hour kit	Edit Delete
:7	Prepare a sufficient number of department emergency preparedness and evacuation 72-heur kits for each facility	Edt Delete
#8	Instruct all personnel on the preparation of individual 72-hour kits	Edit Delete
19	Inspect department emergency preparedness and evacuation 72-hr kits on a quarterly basis	Edit
#10	Train employees in hostage/threat reporting tactics that do not expose their situation.	Edt Defete
Response ((During Event) Actions for Man-Made Physical Disruption	18 Sert Actions
	Action	
#1	Prioritize life safety.	Edit
#2	Call 9-1-1	Ed3 Delete
#3	Report the detection of any suspicious object/potential bomb device immediately	Edit
sion: 21.03.164	Coavright @ 2004 - 2021, BOLDalanning, Inc., All rights reserved.	Privacy Policy Terms of

Figure: Add New Action

- 7. Decide what this action's role & phase is for and click on the box to the right of 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.

<u>ប</u>	Add New Action - Han-Hade Physical Disruption	Your access level is dev My Account - User Manager Instance: I-07d7b2ed9f5962edd
Main Menu	Action / Role & Phase Departments / Positions Risks / Hazards	dministration Logot
Hazard	Preparedness (Pre-Event) Response (During Event) Recovery (Post Event) Mitigation Vulnerable Needs TDR - Response - Finance TDR - Response - HR	
Preparednes	🎋 B / U Ar Stor - 三 三 本 本 主 豊 🎄 🙈 Strice - 🏂 🏟 🗃 🗇 🗟 🕬 a Source a	28 Sort Actions
#1.		Ent Conte
#2		Edt Dates
#3		Edt Delete
#4		Eill Cokk
45		(Ed) (Hand
36		Edt Dovice
\$7		Edl Delate
88		(Lit) (Press
#9		Edt Conte
#10		Est Doore
Response (D	Bays Cancel	11 Sort Actions
#1 .	Prontize life safety.	
+2	Cal 5-1-1	Edit
#3	Report the detection of any suspicious object/portential bomb device immediately	Edt Delete
ersion: 21.03.164	Copyright (0 2004 - 2021, BOLDalanning, Inc., All rights reserved.	Privacy Policy Terms of Us

Figure: Description of New Action

- 9. Click "Save."
- 10. Check to make this information entered is correct.

	planning	Emergenc	y Management Demo - ((COOP) - (149)			My Accourt	n level is dev 1 - User Manager -07d7b2ed9f5962edd			
Main Men	u General Info	Contacts	Manage Your Plan +	File Archive	Reports	Messages	Administration	Logaut			
Haz	zards / Risk Assessment										
			Mew All	Risks Add New Act	tion						
Prepared	ness (Pre-Event) Actions for M	an-Made Physics	al Disruption					18 Bort Actions			
	Action		di								
1	Develop a communication plan/phon	e tree for key staff and	d management within the organizat	lion				Edt Delute			
2	Install a physical security system							Edit Delete			
3	Inspect emergency back up power s	Inspect emergency back up power sources/regulators for utilities.									
4	Train personnel in detecting and rep	orting procedures for b	oomb threats					Edt Delete			
5	Identify emergency evacuation route	es from facility						Edt Delete			
6	Ensure each employee has prepared	an individual, seasona	illy-appropriate 72-hour kit					Edit Delete			
7	Prepare a sufficient number of depart	tment emergency pres	paredness and evacuation 72-hour l	kits for each facility				Edt Defete			
8	Instruct all personnel on the prepara	tion of individual 72-h	our kits					Edit Delete			
9	Inspect department emergency prep	aredness and evacuati	ion 72-hr kits on a quarterly basis					Edt Delete			
10	Train employees in hostage/threat n	eporting tactics that do	o not expose their situation.					Edit Delete			
Paenonea	(During Event) Actions for Ma	n Made Physical	Discustion					18 Sort Actions			
Response	Action	in Huue Filysica	, plai aption								
1	Prioritize life safety.							Edf Delete			
2	Cell 9-1-1							Edt Delete			
3	Report the detection of any suspicion	us object/potential bon	nb device immediately					Edit Delete			
on: 21.03.164			Committe D. 2004	2021, BOLDplanning, Inc., All	I dabte mean of			Privacy Policy Terms			

Figure: Edit/Delete a Hazard

- 11. Use the "Edit" or "Delete" button to the right of the action to make changes or deletions.
- 12. Repeat steps 7 to 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/Risks

- 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.

Ma	in Menu	General Info Risk Assessment	Contacts	Menage Your Plan >	File Archive	Reports	Messages	Administration	Logout
	nazarus /	RISK ASSESSMENT	•	Add Hazar	d / Risk Import Hazards	e / Risks			
riority	Risk				Risk Rating	i			
11	Man-Made Pl	hysical Disruption			1.75 - Low			View / Edit	Action List
2	Earthquake				1.55 - Low			View / Eat	Action List
13	Dam or Leve	e Failure			1.9 - Low			View / Edit	Action List
4	Hazardous M	aterials Incident (HAZMAT))		3.3 - Noder	ate		View / Edit	Action List
5	Voicanic Eru	ption			2.3 - Noder	ate		View/Est	Action List
6	Pandemic Ev	ent			3.9 - Hoden	ate		View / Edit	Action List
:7	Tornado				2,05 - Mode	rate		View / Edit	Action List
7	Riverine Floo	d			2.55 - Mode	rate		View / Edit	Action List
8	Extreme Wea	ather - Winter Storm			3.55 - High	k.		View / Edit	Action List
19	Extreme Wea	ather - High Temperature			2.5 - Noden	ate		View / Edit	Action List
9	Power Outag	e			3.5 - High			View / Edit	Action List
11	Severe Thun	derstorms			2.35 - Mode	rate		View / Edit	Action List

Figure: Rearranging Hazards

912	In Menu General Infe Hazards / Risk Assessment	Contacts	Manage Your Plan +	File Anthive	Reports	Messages	Administration	Logav	-
	hazards / Kisk Assessment		Add Haza	nd / Risk (Import Hazards / R	***				
riority	Risk			Risk Rating					
*1	Man-Made Physical Disruption			1.75 - Low			View/Edit	Action	Lisi
2	Pandemic Event			2.9 - Moderate			View / Edit	Action	Line .
3	Earthquake			1.55 - Low			View/Edit	Action	List
r4	Dam or Levee Failure			1.9 - Low			View/Edit	Action	List
15	Hazardous Materials Incident (HAZMAT)			2.5 - Moderate	6		View / Edit	Action	List
F6	Volcanic Eruption			3.3 - Moderate	Ú.		View / Edit	Action	Lint
17	Tornado			2.05 - Modaret			Vew/Edt	Action	List
18	Riverine Flood			2.55 - Modurat			View / Edit	Action	List
19	Extreme Weather - Winter Storm			3.55 - High			View / Edit	Action	List
10	Extreme Weather - High Temperature			2.5 - Modezate			View/Edit	Action	List
11	Power Outage			3.5 - High			View / East	Action	List
12	Severe Thunderstorms			3-35 - Hoderst	• 1		View / Edit	Action	List

Figure: Rearranging Hazards

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

Sample Report for Hazards/Risk Assessment

Following is a sample report for the hazards/risk assessment section of a plan. SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

Risk	Risk	Risk Type	Risk Description	Risk Impact
Rating				
2.8 -	Pandemi	Biological	A disease epidemic	Impacts could
Moderate	c Event	Risk	occurs when there are	include a significant
			more cases of that	shortage of
			disease than normal.	personnel in the
			A pandemic is a	workplace, putting a
			worldwide epidemic	strain on operations.
			of a disease. An	Additionally, medical
			influenza pandemic	facilities will be
			may occur when a	strained with
			new influenza virus	demands to care for
			appears against	both influenza and
			which the human	non-influenza
			population has no	patients.
			immunity. If a	
			pandemic were to	
			occur today, we could	

	expect the virus to spread rapidly due to the interconnected nature of the world and the high level of global travel.	
--	--	--

References/Authorities

The purpose of references/authorities is to provide information on the various laws, ordinances, executive orders, etc. mandating the continuity/emergency planning requirements. While new references or authorities can be added here, you will generally not be editing this section of the plan. All existing general ones are already pre-loaded into the system.

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 completer and more useful your reports will be. Your reports can be accessed either through the Main Menu or the Navigation Bar.

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

- Main Plan: The narrative portion of your plan. The main 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 main 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): This is the data for your plan in list and table form. The Annexes have most of the specific data related to your organization.

The annexes correspond closely to the various parts of the continuity planning system that you will be filling out as you develop your plan. This is where you enter and then report on the information unique to your organization. The report annexes are:

- Annex A Teams and Responsibilities
- Annex B Facilities
- Annex C Essential Functions
- Annex D Orders of Succession
- Annex E Delegations of Authority
- Annex F Alert Notification Procedures
- Annex G Essential Resources
- Annex H Drive Away/Go Kits

- Annex I Communications
- Annex J Security Access Control
- Annex K Family Disaster Plan
- Annex L Devolution
- Annex M Test, Training, and Exercise
- Annex N Facility Evacuation
- Annex O Contacts
- Annex P Pandemic Planning
- Annex Q Risk Assessment
- Annex R Risk Specific Action List

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:

- 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.

Sample reports like the ones you will generate from the system are provided in this plan user guide. For each of the sections of your plan these sample reports will be included in the appropriate section. If you see the following SAMPLE REPORT HEADER on the page, you are looking at a sample report for that section.

SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT SAMPLE REPORT

Viewing or Printing Plan Reports

- 1. Click on the "Reports" button on the Main Menu button list or task bar.
- 2. Decide on which section of the plan you wish to report on.
- 3. If you wish to see the report using an Internet browser window (helpful if you just want a quick look at the report or if you do not have Microsoft Word or Excel available on your computer), click on the HTML icon to the right of the relevant section of the report.

- 4. If you wish to save or print out the report, click on the Word icon to the right of the relevant section of the report.
- 5. If you wish to save or print out a spreadsheet of the report, click on the Excel icon to the right of the relevant section of the report.

Status Reporting

The status light bar (red, yellow, green, or grayed out) lets you know to what extent each section of your plan is complete. The status bar is initially grayed out as you start to work on each section of your plan. When your plan is ready to be reviewed by your plan manager, or by BOLDplanning staff working on behalf of your organization, the status bar will be lit up as each section is reviewed.

The reviewer will assign a status to each section based on the relative completeness of each section. A **green** light indicates that the section appears to be complete and there is a sufficient level of detail to meet the requirements of a plan. A **yellow** light indicates that an effort has clearly been made, but that there is still obvious work to be done, such as adding phone numbers or email addresses for listed contacts, or a missing mission statement in the General Information screen. A **red** light indicates that no or virtually no work has been done on the scored section.

The plan reviewer will leave a comment for each section, explaining what changes or additions are still required. After your plan has been reviewed, you can check your plan status by looking at the Reports screen. You can look at the specific comments left by the plan reviewer for each section. You will be requested by your organization to go back to any section with a **yellow** or **red** light to complete that section and it will then be re-reviewed.

Note that you will only be able to check the status of your plan after it has been reviewed.

Checking the Status of Your Plan

- 1. Click on the "Reports" button on either the Main Menu button list or task bar.
- 2. Decide which section of the plan for which you wish to check the status.
- 3. Place your cursor over the status bar. When the hand appears, left click. (If no hand appears, then your plan is not in a "reviewed" status.)
- 4. Read the comments left by the plan reviewer and note what changes or additions you may need to make for this section.
- 5. Click either "Save" or "Cancel."

Running an Audit Log Report

Within the BOLDplanning platform, you can run an audit log to see the changes users make within your plan. You can select the plans you wish to audit and can also choose the timetable you wish to audit, as well.

1. Click on the Administration tab on the Main Menu page.

Jefferson County Commiss	slaner's Office - CDOP - {36}		1.00		Your ecoses law	out in clevi
Actors +	Pouple >	Plates +	Things +	View Man	Administration	Logost
Rie Archise	Vex Pan					
		For security purposes, p	lease be sure to log-off when fini	ished with your session.	n	
Orders of Succession	Delegations of Authority	D				
Alert Notification Procedures	60 X/IX	D				
	ILLE Archive	Actors + Peyle + Rie Actore View Pan Oriens of Succession Delegations of Authority	Access # Polytic # Places # Title Archive Very Pain SubJournation to StoL/Datamentation and a set for search to StoL/Datamentation and a set of set for search to StoL/Datamentation and a set of set of search to StoL/Datamentation and a set of set	Actors > People > Place > Targe > Rie Active Vers Pan Subjerning com, your on ine source for or subgrowt to create a samptardown and part of the source for the source of the source	Actors > People > Place > Trapps + Veer Hon If is Active Weight > Weight > <td< td=""><td>Acture > People > Placts > Thops > Vew Han Attribute Attribute Attribute Attribute Attribute Attribute Attribute Display in the source for developing and maintaining your Continuity of Operations Res (C Continuity of Operations (C Contin (C Contin (</td></td<>	Acture > People > Placts > Thops > Vew Han Attribute Attribute Attribute Attribute Attribute Attribute Attribute Display in the source for developing and maintaining your Continuity of Operations Res (C Continuity of Operations (C Contin (C Contin (

2. Under the "Users" buttons, click on the "Audit Logs" button.

1	D P	lannin		orporation Executive	e Management	- (Business C	ontinuity Plan)		
M	lain Menu	General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
-	Adm	inistrative Cor	ntrols						
	Adm	S	Plans Create New Plan Delete a Plan(s) ystem Wide Properties stem Default Properties Plan Wide Properties ystem Wide Messages Edit Heiper Tips Edit System Ernais Base Plan Editor Add / Edit Functions / Edit Grade Comments / Edit Grade Comments	Users User Manager Current Users System Wide Current User Audit Logs Impersonate User Review Changes	Veral Sy Plan Grades User / Access HSEEP Ev Deconflic Interdepen	stem Report ummary / Report Dard Report Dy Plan Report by User rents Report tion Report dency Report o Report	Surveys Survey Results		
Version: 2	21.03.171			Copyright @ 2004 - 2021, 8	OLDplanning, Inc., A	II rights reserved.		Privacy Po	icy Terms of Use

- 3. Choose the plan you wish to audit.
 - a. After selecting a plan, choose what users you wish to include in the audit log.
 - b. After selecting the users, select a start date and end date for the report; what timetable are you wanting to audit?

	lannin		celior C	orporation Executi	ve Managemen	t - (Business Cor	itinuity Plan)	- (59) My Account	level is dev - User Manager 07d7b2ed9f5962edd
Main Menu	General Info	Conta	acts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
	Audit Log								
		To view	w activity	within the system: se	elect a Plan and/o	r User, then enter a	a date range.	_	
		Plan:	All Plans						
			MasterS	System - COOP					
			[Accelior	Corporation - Master Data	Area]				
			Accel	ior Corporation - Emergen	cy Operations Plan - E	Emergency Operations F	Plan 🗌		
			IT Dis	saster Recovery - Emerger	cy Operations Plan				
			Accel	ior Corporation Executive I	Management - Busine	ss Continuity Plan			
			Accel	ior Corporation Finance De	partment - Business	Continuity Plan			
			Accel	ior Corporation Human Re	sources - Business Co	ntinuity Plan			
			[BOLDpla	anning College - Master Da	ta Area]				
			Leeds	s College - Emergency Ope	rations Plan				
		User:	All Users						
			_	Date F	tange (MM/DD/YYYY)		_		
			2	Start Date: 08/09/2021 View Online		: 08/09/2021 🗾	J		
aion: 21.03.171				Copyright @ 2004 - 2021	BOLDplanning, Inc.,	All rights reserved.		Privacy	Policy Terms of U

4. After selecting the correct criteria, you can either click the "View Online" button (to view the report in html form), or you may click the "View in Excel" button (to view in Microsoft Excel).

planning	Accelior Co	orporation Executi	ve Managemen	- (Business Co	ntinuity Plan)		evel is dev User Manager 7d7b2ed9f5962edd
Main Menu General Info C	Contacts	Manage Your Plan *	File Archive	Reports	Messages	Administration	Logout
Audit Log	view activity	within the system: se	elect a Plan and/o	r User, then enter	a date range.		
Pla	an: All Plans						
	MasterS	ystem - COOP					
	[Accelior	Corporation - Master Data	Area]				
	Accell	or Corporation - Emergen	cy Operations Plan - E	mergency Operations	Plan 🗌		
	IT Dis	aster Recovery - Emerger	cy Operations Plan				
	Accell	or Corporation Executive I	Management - Busine	s Continuity Plan			
	Accell	or Corporation Finance De	partment - Business	Continuity Plan			
	Acceli	or Corporation Human Re	sources - Business Co	ntinuity Plan			
	[BOLDpla	nning College - Master Da	ta Area]				
	Leeds	College - Emergency Ope	rations Plan		Q		
Use	er: All Users						
		Date F	lange (MM/DD/YYYY)				
	S	tart Date: 08/09/2021 View Online		08/09/2021			
resion: 21.03.171		Copyright @ 2004 - 2021	BOLDplanning, Inc.,	VII rights reserved.		Privacy P	olicy Terms of Use

Running User Access by User Report

Within the platform you may also run "User Access by User" reports to check user credentials and what plans certain users have access to.

1. Click on the Administration tab on the Main Menu page.

	Main Menu Jefferson County Commit	issianer's Office - COOP - {36}			r	Welcoms, Kay Your seeman Your seeman Your seeman Justance: 1-0	ne in Kayla.
Men Menu Ban >	Actors =	Pospie >	Places +	Things +	View Man	Administration	Logout
Plan GeneralInfe Messages	Rile Archive	Vex Par				rour Continuity of Operations Plan (and, that not only produces a hard)	
Actions Hezards / Rids Assessment Essential Functions	ľ		Far security purposes, a	w left, you can navigate through please be sure to log-off when fin tions, please contact us at <u>helo@</u>	nished with your session.	Barriel	
People Contacts Teams Devolutions	Overs of Succession	Delegations of Authority	D				
Places Facilities Faci							
Essential Records/Resources TTE / Plan Maintenance References / Acthentian	Alert Notification Procedures	60 K/S	D				

2. Under the "Reports" buttons, click on the "User/Access Report by User" button.

Main Merul General Info Contacts Manage Your Plan > File Archive Reports Messages Administration Logout Administrative Controls Plans Users Reports Surveys Surveys Delete a Plan(s) User Manager Overall System Report Survey Results Survey Results System Wide Properties System Wide Properties Audit Logs User / Access Report by User Survey Results Survey Results Base Plan Editor Audit Logs User / Access Report by User HEEPE Events Report Bese Plan Editor Add / Edit Functions Add / Edit Functions Add / Edit Grade Comments Rel Up Report Rel Up Report Add / Edit Codes & Selection Copyright © 2004 - 2021, St/LDplanning, Inc., All rights reserved. Privacy Poils Terms of Use	planning	Accelior Corporation Executiv	ve Management - (Business	Continuity Plan) -	(59) Your access level My Account - User Instance: i-07d7b	Manager
Plans Users Reports Surveys Oreal New Pian User Manager Oreal System Report Survey Results Delets a Plan(s) Current Users Plan Summary System Wide Properties Audit Loga User / Access Report by Plan Ran Wide Properties Audit Loga User / Access Report by Plan Plan Wide Properties Impersonate User User / Access Report by Plan System Wide Messages Review Changes HSEEP Events Report Edit Heiper Tips Deconfliction Report Deconfliction Report Edit System Emails Base Plan Editor Reil Up Report Add / Edit Grade Comments Kdd / Edit Codes & Selectiont Reil Up Report	Main Menu General Info C	Contacts Manage Your Plan »	File Archive Reports	Messages	Administration	Logout
Create New PlanUser ManagerOverall System Report.Survey ResultsDelete a Plan(s)Current UsersPlan SummarySystem Wide PropertiesAudit LogsUser / Access Report DaridSystem Delsult PropertiesAudit LogsUser / Access Report by PanPlan Wide PropertiesImpersonate UserUser / Access Report by VanSystem Wide MessagesReview ChangesHSEEP Events ReportEdit Heiper TipsDeconfliction ReportEdit Heiper TipsDeconfliction ReportBese Plan EditorReliverAdd / Edit Grade CommentsAdd / Edit Grade CommentsAdd / Edit Codes & SelectiontSelectiont	Administrative Controls					
	Create N Delete a System Wid System Wid Flan Wide System Wid Edit Hel Edit Syste Base Pli Add / Edit Gra	iew Plan Plan(s) e Properties with Properties Properties Properties e Manager Current Users Audit Logs Impersonate User e Masages Properties mernals an Editor Functions de Comments	Overall System Report. Plan Summary Plan Grades / Report Dand User / Access Report by Plan User / Access Report by User HSEEP Events Report Deconfliction Report Interdependency Report			
	Version: 21.03.171				Privacy Policy	Terms of Use

3. A download of the report will now begin and will allow you to open the report in Microsoft Excel.

lenu General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Log
Administrative Cont	rols						
	Plans	Users		orts	Surveys		
	Create New Plan	User Manager	Overall Sy	tem Report	Survey Results		
	Delete a Plan(s)	Current Users	Plan S	ummary			
Sys	tem Wide Properties	System Wide Current User	Plan Grades	/ Report Card			
Syst	em Default Properties	Audit Logs	User / Access	Report by Plan			
R	an Wide Properties	Impersonate User	User / Access	Report by User			
Sys	tem Wide Messages	Review Changes	HSEEP EV	ents Report			
	Edil Helper Tips		Deconflic	ion Report			
E	dit System Emails		Interdepend	ency Report			
	Base Plan Editor		Roll Up	Report			
A	dd / Edit Functions						
Add (Edit Grade Comments						
Add /	Edit Codes & Selections						
Concession of the second							
171		Copyright @ 2004 - 2021, B		dable monored		Privacy	Deller

Running User Access by Plan Report

Within the platform, you may also run "User Access by Plan" reports to check user credentials, view what plans exist within your platform, and what certain users have access to regarding plans.

1. Click on the Administration tab on the Main Menu page.

	Main Menu Jefferson County Comm	issianer's Office - COOP - (36)				Welcoms, Kay Tour scenario Tour scenario Instance: i-0	t in Keyle.
Main Menu Bart >	Actors #	Pouple +	Places +	Things #	Vew Han	Attrivistorition	Logost
Plan General Info Actions Tearnets / Biol Assessment	Tile Anthree	Vex Par	BOLDplarning.com w also a "living plan". Using the buttone to		zed on-line planning environme each section of your CDOP plu	our Continuity of Operations Plan (C ent, that net only produces a hard c en.	
People Contacts Teams Devolutions	Orders of Succession	Delegitions of Authority	For comments or que	ofons, please contact us at <u>helo</u> g	BOLDelanine.com		
Places Padilles Security and Access							
Things Communications Essential Recards/Resources TTE / Plan Maintenance References / ActivetSus	Piert Notification Procedures) (Go K/IS	1				

2. Under the "Reports" buttons, click on the "User/Access Report by Plan" button.



3. A download of the report will now begin and will allow you to open the report in Microsoft Excel.

Sector Sector	ning	144000	International statements of the Second stateme	11480 1000 0000 0	2800.000	200		07d7b2ed9f5962e
Main Menu Genera	envineev	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Administrat	ive Controls							
		lans	Users	Re	ports	Surveys		
	Create	New Plan	User Manager	Overall Sy	ystem Report	Survey Results		
	Delete	a Plan(s)	Current Users	Plan S	Summary			
	System W	ide Properties	System Wide Current Use	Plan Grade	s / Report Card			
	System De	ault Properties	Audit Logs	User / Acces	a Report by Plan			
	Plan Wic	e Properties	Impersonate User	User / Access	Report by User			
	System W	ida Messages	Review Changes	HSEEP E	vents Report			
	Edit H	elper Tips		Deconflic	ction Report			
	Edit Sy	lem Emails		Interdepen	dency Report			
	Base	lan Editor		Roll U	p Report			
		lit Functions						
	A CONTRACTOR OF THE OWNER OF THE	rade Comments						
	Add / Edit Co	des & Selections						
VOLDER MARSHALL							1 (Attal) and	
£1.03.171			Copyright @ 2004 - 2021, 8	OLDplanning, Inc., A	Il rights reserved.		Privacy	Policy Terms

Interdependency Reports

Plan administrators may also use interdependency reports within the BOLDplanning platform to perform gap analysis on selected plans. This feature allows you to see where information regarding interdependencies may be missing within your plan's sections.

1. Click on the Administration tab on the Main Menu page.

-B BOLD	Main Menu Jefferson County Comm	rissianer's Office - COOP - (36)				Welcome, Kay Tour scenner Your scenner Ny Accessit Instance: 1-0	e is Kayla. wel la devi
Main Menu 🧭	Actors #	Pouple >	Plates P	Things +	View Han	Administration	Logost
Plan General Info Messages	Tile Anthive	Ves Pan				our Continuity of Operations Plan (int, that not only produces a hard i	
Actions Hearth / Rids Assessment Essential Punctions			Using the buttoms to to For security purposes.	w left, you can navigate through please be sure to log-off when f tions, please contact us at <u>helo@</u>	inished with your session.	n.	
Contacts Teams Devolutions	Orders of Succession	Delegations of Authority	0				
Places Facilities Security and Access							
hings Communications Essential Records/Resources	Alert Nothcation Procedures	Ge Kits					
TTE / Plan Mantenance References / Authorities							

2. Under the Reports section of buttons, click on the "Interdependency Report" button.

P	lannin	9	10 J				Instance: I-0	7d7b2ed9f59
Main Menu	General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Adm	inistrative Con	trols						
	_	Plans	Users	Report		Surveys	_	
	<u> </u>	Create New Plan	User Manager	Overall System	n Report	Survey Results		
		Delete a Plan(s)	Current Users	Plan Sumr	mary			
	S	stem Wide Properties	System Wide Current User	Plan Grades / Re	eport Card			
	Sys	tern Default Properties	Audit Logs	User / Access Re	port by Plan			
		1an Wide Properties	Impersonate User	User / Access Rep	port by User			
	(8)	stem Wide Messages	Review Changes	HSEEP Event	s Report			
		Edit Helper Tips		Deconfliction	Report			
		Edit System Emails		Interdependent	cy Report			
		Base Plan Editor		C Roll Up Re	eport			
		Add / Edit Functions						
	Add	/ Edit Grade Comments						
	Add /	Edit Codes & Selections						
	_							
21.03.171			Copyright @ 2004 - 2021, B	OLDplanning, Inc., All rig	ghts reserved.		Privacy P	olicy Terms

3. In the Plan Selection drop-down menu, select the type of plan you are looking for (e.g., COOP, BCP, EOP, etc.).

D planning	Accelior Corpor	ration Executiv	ve Managemen	t - (Business	Continuity Plan)		t - User Manager -07d7b2ed9f5962edd
Main Menu General Info	Contacts Mar	nage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Roll Up Report							
Plan Selection: COOP	~ <mark>•</mark> × •	Report Type: Inter	dependency Report	/ Vital Records	✓ Report Outpu	t: Excel 🗸 🤇 Ge	nerate Report
Select All Search / Filter:							
MasterSystem - COOP							
Department of Information Technology -	COOP						
Department of Public Works - COOP							
Emergency Management - COOP							
Jefferson County Commissioner's Office -	- COOP						
Jefferson County Finance Department - Country Finance Department - Coun	COOP						
🗌 Jefferson County Human Resources Depa	artment - COOP						
Jefferson County Information Technology	y Department - COOP						
Metro Airport Authority Operations - COC	DP						
Metro Airport Authority Security - COOP							
Public Health Department - Director's Off	fice, Administration a	and Finance - COO	P				
Public Health Department - Emergency P	reparedness and Res	ponse - COOP					
4							
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4. Underneath the Plan Selection drop-down, click on the plans you wish to run a report for.

Plan Selection: COOP Select All Search / Filter: Generate Report Select All Search / Filter: *Master System * - COOP Department of Information Technology - COOP Department of Public Works - COOP Benerate Report Department of Information Technology - COOP Benerate Report Department of Public Works - COOP Benerate Report Department of Information Technology - COOP Beferson County Finance Department - COOP Jefferson County Human Resources Department - COOP Jefferson County Information Technology Department - COOP <th>Roll Up Report</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	Roll Up Report								
MasterSystem - COOP Department of Information Technology - COOP Department of Public Works - COOP Emergency Management - COOP Jefferson County Commissioner's Office - COOP Jefferson County Finance Department - COOP Jefferson County Finance Department - COOP Jefferson County Human Resources Department - COOP Jefferson County Information Technology Department - COOP Metro Airport Authority Operations - COOP Metro Airport Authority Security - COOP Public Health Department - Director's Office, Administration and Finance - COOP	Plan Selection: COOP	~ + ×	Report Type: Inte	rdependency Report /	Vital Records	~ Report	output: Excel 🗸	Generate Report	
Department of Information Technology - COOP Image: Coop Department of Public Works - COOP Image: Coop Emergency Management - COOP Image: Coop Jefferson County Commissioner's Office - COOP Image: Coop Jefferson County Finance Department - COOP Image: Coop Jefferson County Human Resources Department - COOP Image: Coop Jefferson County Information Technology Department - COOP Image: Coop Metro Airport Authority Operations - COOP Image: Coop Metro Airport Authority Security - COOP Image: Coop Public Health Department - Director's Office, Administration and Finance - COOP Image: Coop	Select All Search / Filter:								_
Department of Public Works - COOP Emergency Management - COOP Jefferson County Commissioner's Office - COOP Jefferson County Finance Department - COOP Jefferson County Human Resources Department - COOP Jefferson County Information Technology Department - COOP Metro Airport Authority Operations - COOP Metro Airport Authority Security - COOP Public Health Department - Director's Office, Administration and Finance - COOP	*MasterSystem* - COOP								
Emergency Management - COOP	Department of Information Technology - COOF	•3							
Jefferson County Commissioner's Office - COOP	Department of Public Works - COOP								
Jefferson County Finance Department - COOP	Emergency Management - COOP								
Jefferson County Human Resources Department - COOP	Jefferson County Commissioner's Office - COO	P							
Jefferson County Information Technology Department - COOP	Jefferson County Finance Department - COOP								
Metro Airport Authority Operations - COOP Metro Airport Authority Security - COOP Public Health Department - Director's Office, Administration and Finance - COOP	Jefferson County Human Resources Department	nt - COOP							
Metro Airport Authority Security - COOP Public Health Department - Director's Office, Administration and Finance - COOP	Jefferson County Information Technology Department	artment - COO)P						
Public Health Department - Director's Office, Administration and Finance - COOP	Metro Airport Authority Operations - COOP								
	Metro Airport Authority Security - COOP								
Public Health Department - Emergency Preparedness and Response - COOP	Public Health Department - Director's Office, A	dministration	and Finance - COO	P					
Functional Department - Emergency reparements and response - coor	Public Health Department - Emergency Prepare	edness and R	esponse - COOP						

5. In the Report Type drop-down menu, select what section of the plan you wish to run the report for (e.g., Vital Records).

Main Menu General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Roll Up Report							
Plan Selection: COOP	~	Report Type: Inte	rdependency Report /	Vital Records	✓ Report Output	t: Excel 🗸 🤇 Ge	nerate Report
Select All Search / Filter:							
MasterSystem - COOP							
Department of Information Technolo	gy - COOP						
Department of Public Works - COOP							
Emergency Management - COOP							
Jefferson County Commissioner's Off	fice - COOP						
Jefferson County Finance Department	t - COOP						
Jefferson County Human Resources I	Department - COO	P					
Jefferson County Information Technol	ology Department	- COOP					
Metro Airport Authority Operations -	COOP						
Metro Airport Authority Security - CO	DOP						
Public Health Department - Director	s Office, Administ	ration and Finance - COO	P				
Public Health Department - Emergen	cy Preparedness	and Response - COOP					

6. In the Report Output drop-down menu, select how you want the report to run (i.e., Microsoft Excel, Microsoft Word, or PDF).

Main Menu General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Roll Up Report							
Plan Selection: COOP	v 🕂	X Report Type: Inte	rdependency Report /	Vital Records	✓ Report Outpu	t: Excel 🗸 🖉 Ge	enerate Report
Select All Search / Filter:							
MasterSystem - COOP							
Department of Information Technology -	COOP						
Department of Public Works - COOP							
Emergency Management - COOP							
Jefferson County Commissioner's Office	- COOP						
Jefferson County Finance Department - 0	COOP						
Jefferson County Human Resources Department	artment - COOP						
Jefferson County Information Technolog	y Department - 0	:00P					
Metro Airport Authority Operations - COO	DP						
Metro Airport Authority Security - COOP							
Public Health Department - Director's Of	fice, Administrat	ion and Finance - COO	P				
Public Health Department - Emergency P	reparedness and	Response - COOP					

7. Click the "Generate Report" button and your report will download.

Main Menu General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Roll Up Report							
Plan Selection: COOP	~	🕂 🗙 Report Type: Inter	dependency Report /	Vital Records	✓ Report Output	: Excel 🗸	Generate Report
Select All Search / Filter:							
MasterSystem - COOP							
Department of Information Techno	logy - COOP						
Department of Public Works - COOF	2						
Emergency Management - COOP							
Jefferson County Commissioner's O	ffice - COOP						
Jefferson County Finance Departme	ent - COOP						
Jefferson County Human Resources	Department - COO	P					
Jefferson County Information Tech	nology Department	- COOP					
Metro Airport Authority Operations	- COOP						
Metro Airport Authority Security - 0	OOP						
Public Health Department - Directo	r's Office, Administ	ration and Finance - COO	2				
Public Health Department - Emerge	ncy Preparedness a	and Response - COOP					

Deconfliction Report

Using the deconfliction report within the platform allows users to view overlapping information that may cause issues when activating a plan. For example, regarding COOP, a user may want to run a deconfliction report for facilities to see what primary facilities are linked to certain alternate facilities. If the alternate facility has been chosen for multiple primary facilities, the continuity planner may want to reassign an alternate facility, if space is limited and cannot accommodate multiple primary facilities relocating there all at once.

-B BOLD	Main Menu Jefferson County Com	nmissioner's Office - COOP - {36}		181		Welcoms, Kayla Your sofernore Your eccass in Instance: 1-40	e is Kayle.
Main Menu 🧭	Actors -	Pouple >	Plates +	Things +	View Man	Administration	Logost
Plan General Info Messages	File Archive	Vex Pan				our Continuity of Operations Plan (C nt, that not only produces a hard to	
Actions Hezerds / Rick Accessment Essential Functions			Using the buttons to t For security purposes.	the left, you can navigate through a please be sure to log-off when t strons, please contact us at <u>helod</u>		M21	
Contexts Teams Devolutions	Orders of Succession	Delegitions of Authority	1				
Places Paddles Security and Access							
TTE / Plan Maintenance References / Actherities	being environmentation	es Go Xits					
	-						

1. Click on the Administration tab on the Main Menu page.

2. Under the Reports section of buttons, click on the "Deconfliction Report" button.



3. In the Plan Selection drop-down menu, select the type of plan you are looking for (e.g., COOP, BCP, EOP, etc.).

-B BOLD	Roll Up Report Accelior Corporation Execu	tive Management - (Busine	ss Continuity Plan) - (59)	Welcome, Kayla McMahan. Your username is Kayla. Your access level is dev My Account - User Manager Instance: I-07d7b2ed9f5962edd
Main Menu General Info (Contacts Manage Your Plan >	File Archive Reports	Messages Admir	nistration Logout
Roll Up Report				
Plan Selection: COOP	✓ 🗭 🗙 Report Type: De	econfliction Report - Staff	✓ Report Output: Excel √	Generale Report
Select All Search / Filter:				
MasterSystem - COOP				
Department of Information Technology -	COOP			
Department of Public Works - COOP				
Emergency Management - COOP				
Jefferson County Commissioner's Office -	COOP			
Jefferson County Finance Department - Co	OOP			
] Jefferson County Human Resources Depart	rtment - COOP			
Jefferson County Information Technology	Department - COOP			
Metro Airport Authority Operations - COO	P			
Metro Airport Authority Security - COOP				
Public Health Department - Director's Official	ice, Administration and Finance - CO	OOP		
Public Health Department - Emergency Pr	reparedness and Response - COOP			
/ersion: 21.03.171	Copyright © 2004 - 202	21, BOLDplanning, Inc., All rights reserv	ved.	Privacy Policy Terms of Use

4. Underneath the Plan Selection drop-down, click on the plans you wish to run a report for.

~ =	N 2 12 12					
	Report Type: Deco	onfliction Report - Staf	f	 Report Output 	: Excel 🗸 🛛 Ger	nerale Report
gy - COOP						
ļ.						
fice - COOP						
t - COOP						
Department - COO	P					
ology Department	- COOP					
COOP						
DOP						
s Office, Administr	ation and Finance - COO	Р				
cy Preparedness a	nd Response - COOP					
	ice - COOP it - COOP Department - COOI plogy Department - COOP NOP s Office, Administr	iice - COOP it - COOP Department - COOP ology Department - COOP COOP	ice - COOP it - COOP Department - COOP ology Department - COOP COOP OOP S Office, Administration and Finance - COOP	ice - COOP it - COOP Department - COOP plogy Department - COOP COOP NOP s Office, Administration and Finance - COOP	ice - COOP it - COOP Department - COOP Dology Department - COOP COOP COOP NOP s Office, Administration and Finance - COOP	ice - COOP it - COOP Department - COOP Dology Department - COOP COOP SOP SOP SOP Soffice, Administration and Finance - COOP

5. In the Report Type drop-down menu, select what section of the plan you wish to run the report for (e.g., Deconfliction Report - Staff).

-B BOLD	Roll Up I Accelior Co	Report proration Executiv	ve Management	- (Business	Continuity Plan) - (59) Your an Your an My Acc	ne, Kayla McMahan. sername is Kayla. ccess level is dev ount - User Manager ce: i-07d7b2ed9f5962edd
Main Menu General Info	Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
Roll Up Report		_					
Plan Selection: COOP	~ ∉	X Report Type: Deco	onfliction Report - Stal	f	✓ Report Outp	ut: Excel 🗸 🧲	Generale Report
Select All Search / Filter:							
MasterSystem - COOP							
Department of Information Technology	y - COOP						
Department of Public Works - COOP							
Emergency Management - COOP							
Jefferson County Commissioner's Office	e - COOP						
Jefferson County Finance Department	- COOP						
🗍 Jefferson County Human Resources De	partment - COOP						
Jefferson County Information Technology	ogy Department -	COOP					
Metro Airport Authority Operations - Co	OOP						
Metro Airport Authority Security - COO	P						
Public Health Department - Director's C	Office, Administra	tion and Finance - COOI	P				
Public Health Department - Emergency	Preparedness an	d Response - COOP					
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6. In the Report Output drop-down menu, select how you want the report to run (i.e., Microsoft Excel, Microsoft Word, or PDF).

-B BOLD	Roll Up Report Accelior Corporation Executive Management - (Business Continuity Plan) - (59)	Velcome, Kayla McMahan. 'our username is Kayla. 'our access level is dev ly Account - User Manager nstance: i-07d7b2ed9f5962edd
Main Menu General Info	Contacts Manage Your Plan > File Archive Reports Messages Administr	ration Logout
Roll Up Report Plan Selection: COOP	Report Type: Deconfliction Report - Staff V Report Output: Excel V	Generate Report
Select All Search / Filter:		
MasterSystem - COOP		
Department of Information Technolog	r - COOP	
Department of Public Works - COOP		
Emergency Management - COOP		
Jefferson County Commissioner's Office	a - COOP	
Jefferson County Finance Department	COOP	
🗍 Jefferson County Human Resources De	partment - COOP	
Jefferson County Information Technology	gy Department - COOP	
Metro Airport Authority Operations - C	DOP	
Metro Airport Authority Security - COO	P	
Public Health Department - Director's	Office, Administration and Finance - COOP	
Public Health Department - Emergency	Preparedness and Response - COOP	
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7. Click the "Generate Report" button and your report will download.

	toll Up Report ccelior Corporation Executive Management - (Business Continuity Plan) - (5	Welcome, Kayla McMahan. Your username is Kayla. Your access level is dev My Account - User Manager Instance: i-07d7b2ed9f5962edd
Main Menu General Info Con	tacts Manage Your Plan » File Archive Reports Messages	Administration Logout
Roll Up Report		
Plan Selection: COOP	✓ ♣★ Report Type: Deconfliction Report - Staff ✓ Report Output: E>	ccel V Generale Report
Select All Search / Filter:		
MasterSystem - COOP		
Department of Information Technology - CO	OP	
Department of Public Works - COOP		
Emergency Management - COOP		
Jefferson County Commissioner's Office - CO	OP	
Jefferson County Finance Department - COO	P	
Jefferson County Human Resources Department	ent - COOP	
Jefferson County Information Technology Detection	partment - COOP	
Metro Airport Authority Operations - COOP		
Metro Airport Authority Security - COOP		
 Public Health Department - Director's Office, 	Administration and Finance - COOP	
Public Health Department - Emergency Preparation Pr	aredness and Response - COOP	
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Roll Up Reports

These reports in the BOLDplanning platform allow the user to run reports for a selected section within their plan, which then provides a summary of data inputted by the user and allows the user to perform a gap analysis for that section of their plan.

- BOLD Main Menu COOP - (35 Plan Welcome to SOLDolanning.com, your on-line ing and maintaining your Continuity of Operations Plan (CODP) BOLDplanning.com was designed to also a "living plan". st, that not only p Action Using the buttons to the left, you of your COOP plan For security purposes, please be sure to lop-off when finished with your se For comments or questions, please contact us at help@BOLDplanning.com People Things
- 1. Click on the Administration tab on the Main Menu page.

2. Under the Reports section of buttons, click on the "Roll Up Report" button.

D plan	ning Accelior C	orporation Executive	Management - (Business Co	ontinuity Plan) -	(59) Your access level i My Account - User Instance: i-07d7b3	Manager
Main Menu Genera	I Info Contacts	Manage Your Plan »	File Archive Reports	Messages	Administration L	ogout
Administrat	ive Controls					
	Plans Create New Plan Delete a Plan(s) System Wide Properties System Default Properties Plan Wide Properties System Wide Messages Edit Helper Tips Edit System Ernals Base Plan Editor Add / Edit Functions Add / Edit Grade Comments	Users User Manager Current Users System Wide Current Users Audit Logs Impersonate User Review Changes	Reports Overall System Report Plan Summary Plan Grades / Report Card User / Access Report by Pran User / Access Report by User HSEEP Evente Report Deconfliction Report Interdependency Report	Survey Results		
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3. In the Plan Selection drop-down menu, select the type of plan you are looking for (e.g., COOP, BCP, EOP, etc.).

Main Menu General Info Contacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
Roll Up Report				40 A. C. M. C. M. C.		
Plan Selection: COOP ~	🖙 🗙 Report Type: EF/P	MEF - All Functions C	ombined	~ Report Output	: Excel 🗸 🦲	Generate Report
Select All Search / Filter:						
MasterSystem - COOP						
Department of Information Technology - COOP						
Department of Public Works - COOP						
Emergency Management - COOP						
Jefferson County Commissioner's Office - COOP						
Jefferson County Finance Department - COOP						
Jefferson County Human Resources Department - CO	OP					
Jefferson County Information Technology Department	t - COOP					
Metro Airport Authority Operations - COOP						
Metro Airport Authority Security - COOP						
Public Health Department - Director's Office, Administration	tration and Finance - COO	P				
Public Health Department - Emergency Preparedness	and Response - COOP					

4. Underneath the Plan Selection drop-down, click on the plans you wish to run a report for.

] Jefferson County Commissioner's Office - COOP] Jefferson County Finance Department - COOP] Jefferson County Human Resources Department - COOP	² - All Functions Combined	Report Outpu	it: Excel 🗸	Generale Report
MasterSystem - COOP Department of Information Technology - COOP Department of Public Works - COOP Emergency Management - COOP Jefferson County Commissioner's Office - COOP Jefferson County Finance Department - COOP Jefferson County Human Resources Department - COOP				
Department of Information Technology - COOP Department of Public Works - COOP Emergency Management - COOP Jefferson County Commissioner's Office - COOP Jefferson County Finance Department - COOP Jefferson County Human Resources Department - COOP				
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Jefferson County Finance Department - COOP				
Jefferson County Human Resources Department - COOP				
Jefferson County Information Technology Department - COOP				
Metro Airport Authority Operations - COOP				
Metro Airport Authority Security - COOP				
Public Health Department - Director's Office, Administration and Finance - COOP				
Public Health Department - Emergency Preparedness and Response - COOP				

5. In the Report Type drop-down menu, select what section of the plan you wish to run the report for (e.g., for a COOP, EF/PMEF – all functions combined).

Main Menu General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Roll Up Report							
Plan Selection: COOP	v 🔶)	< Report Type: EF/F	PMEF - All Functions C	ombined N	Report Output:	Excel 🗸 🦳 G	Generate Report
Select All Search / Filter:							
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Department of Information Technology -	COOP						
Department of Public Works - COOP							
Emergency Management - COOP							
Jefferson County Commissioner's Office -	COOP						
Jefferson County Finance Department - C	OOP						
] Jefferson County Human Resources Depa	rtment - COOP						
Jefferson County Information Technology	y Department - CO	OP					
Metro Airport Authority Operations - COC)P						
Metro Airport Authority Security - COOP							
Public Health Department - Director's Off	fice, Administratio	on and Finance - COO	P				
Public Health Department - Emergency P	reparedness and	Response - COOP					

6. In the Report Output drop-down menu, select how you want the report to run (i.e., Microsoft Excel, Microsoft Word, or PDF).

planning	Accelior Co	provision Executiv	ve Management	- (Business (Continuity Plan)	- (59) My Account	e level is dev - User Manager 07d7b2ed9f5962edd
Main Menu General Info	Contacts	Manage Your Plan »	File Archive	Reports	Messages	Administration	Logout
Roll Up Report							
Plan Selection: COOP	v 🌵	X Report Type: EF/P	MEF - All Functions Co	mbined	∼ Report Outpu	ut: Excel 🗸 Gen	erate Report
Select All Search / Filter:							
MasterSystem - COOP							
Department of Information Technolog	gy - COOP						
Department of Public Works - COOP							
Emergency Management - COOP							
🗌 Jefferson County Commissioner's Offi	ice - COOP						
Jefferson County Finance Department	- COOP						
🗌 Jefferson County Human Resources D	epartment - COOP						
Jefferson County Information Technol	logy Department - (COOP					
Metro Airport Authority Operations -	COOP						
Metro Airport Authority Security - CO	OP						
Public Health Department - Director's	Office, Administrat	tion and Finance - COO	P				
Public Health Department - Emergence	y Preparedness and	d Response - COOP					
ersion: 21.03.171		Copyright @ 2004 - 2021,	BOLDplanning, Inc., A	I rights reserved.		Privacy	Policy Terms of Us

7. Click the "Generate Report" button and your report will download.

Select All Search / Filter: * MasterSystem* - COOP Department of Information Technology - COOP Department of Public Works - COOP Emergency Management - COOP Jefferson County Commissioner's Office - COOP Jefferson County Finance Department - COOP Jefferson County Information Technology Department - COOP Jefferson County Information Technology Department - COOP Metro Airport Authority Operations - COOP Metro Airport Authority County Coop	tion: COOP	Main Menu General Info C	ontacts	Manage Your Plan >	File Archive	Reports	Messages	Administration	Logout
Select All Search / Filter: *MasterSystem* - COOP Department of Information Technology - COOP Department of Public Works - COOP Emergency Management - COOP Jefferson County Commissioner's Office - COOP Jefferson County Finance Department - COOP Jefferson County Information Technology Department - COOP Jefferson County Information Technology Department - COOP Metro Airport Authority Operations - COOP Metro Airport Authority Security - COOP	Il Search / Filter: System* - COOP sent of Information Technology - COOP Information Technology - COOP ne of Public Works - COOP Information Technology - COOP n County Commissioner's Office - COOP Information Technology Department - COOP n County Information Technology Department - COOP Information Technology Department - COOP n County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology Department - COOP Information Technology Department - COOP in County Information Technology	Roll Up Report		· · · · · · · · · · · · · · · · · · ·		and the state of t		In contraction of the second	An and the second
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Metro Airport Authority Operations - COOP Metro Airport Authority Security - COOP	irport Authority Operations - COOP irport Authority Security - COOP ealth Department - Director's Office, Administration and Finance - COOP	Jefferson County Human Resources Depart	tment - COOP						
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Public Health Department - Director's Office, Administration and Finance - COOP	ealth Department - Emergency Preparedness and Response - COOP	Public Health Department - Director's Office	ce, Administrat	ion and Finance - COOF	>				
Public Health Department - Emergency Preparedness and Response - COOP		Public Health Department - Emergency Pre	paredness and	Response - COOP					

Email Notification

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 'Plan' tab and select 'Messages' at the top of the Main Menu page.

-3 BC		Main Menu Jefferson County of	Commissioner's Office - (COOP - (36)	•	Welcome, Kayla McMahan. Your username is Kayla. Your access level is dev My Account - User Manager Instance: - 04919ba4691619132 Help
Main Menu General	Plan »	Actions *	People >	Places >	Things >	View an Administration Logout
Plan Plan Plan General Info	lve		File Archive	View Plan	BOLDplanning.com wa that not only produces	ning.com, you on-line source for developing and maintaining your Is Plan (COOP): Is designed to create a standardized on-line planning environment, a hard copy COOP document, but also a "living plan". In left, you can navigate through each section of your COOP plan.
Hazards / Risk Assessment People Contacts	Essential Funct		ers of Succession	Delegations of Authority	For comments or quest	please be sure to log-off when finished with your session. tions, please contact us at <u>help#BOLDelanning.com</u> .
Devolutions Places Facilities	Security and Ar	cess				
Things Communications TTE / Plan Maintenance	Essential Records/R References / Auth		otification Procedures	Go Kits		
demo beido lannina, com/coco/not						

Figure: Messages Tab

2. Click on the "Compose Email" button.

-3	BOLD	Messages Jafferson County Co	emmissioner's Office - CDOP - (36	a			Your usernet Your access Ry Account	nyla McMahan. Ina la Kayla. Iaval is dav Usar Haragar H199ba416fs19/32 Help
Nain Menu	Plan w	Actors -	People +	Places +	Things +	View Man	Administration	Logost
	lessages	There are currently on m	essages to display. Once you s	rease Ense		yed have for your records.		View All Messages 🛛 👻

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 have entered an email address for that contact, you may choose which category of people you would like to send an email to.
 - a. 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.
 - b. 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.
 - a. You may also attach a file with your email.
- 6. Click the "Send" button.