



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.

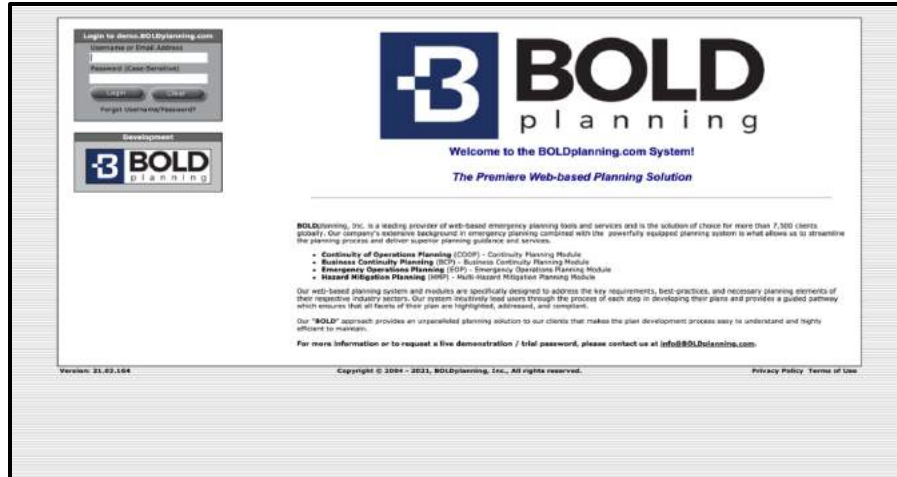


Figure: Login Page

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. Password: enter the provided password. This is CASE SENSITIVE.
4. Click the login button to begin plan development.

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

The First Time You Log into Your Plan – New Users

The first time you log into your plan, you will have to complete the new user screen. Enter your name and email 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.
3. Enter your new password – passwords must be strong with 8 characters or more and must contain at least one upper and one lower case letter, at least one number, and at least one special character. Weak passwords will not be accepted by the continuity planning system. Your password must be STRONG (green) to be accepted.

Changing Your Username and/or Password

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

Forgetting Your Username or Password

Neither BOLDplanning nor your 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.
2. Select your issue in the pop-up box (password, username, both username and password, trouble logging in with existing username and password, or requesting a username and password) and click “Submit.”
3. Your username and password will be emailed to you. The BOLD helpdesk is also available at:
 - Help@BOLDplanning.com
 - 615-469-5558

System Navigation

The Plan Main Menu and Task Bar

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



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.

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.



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:

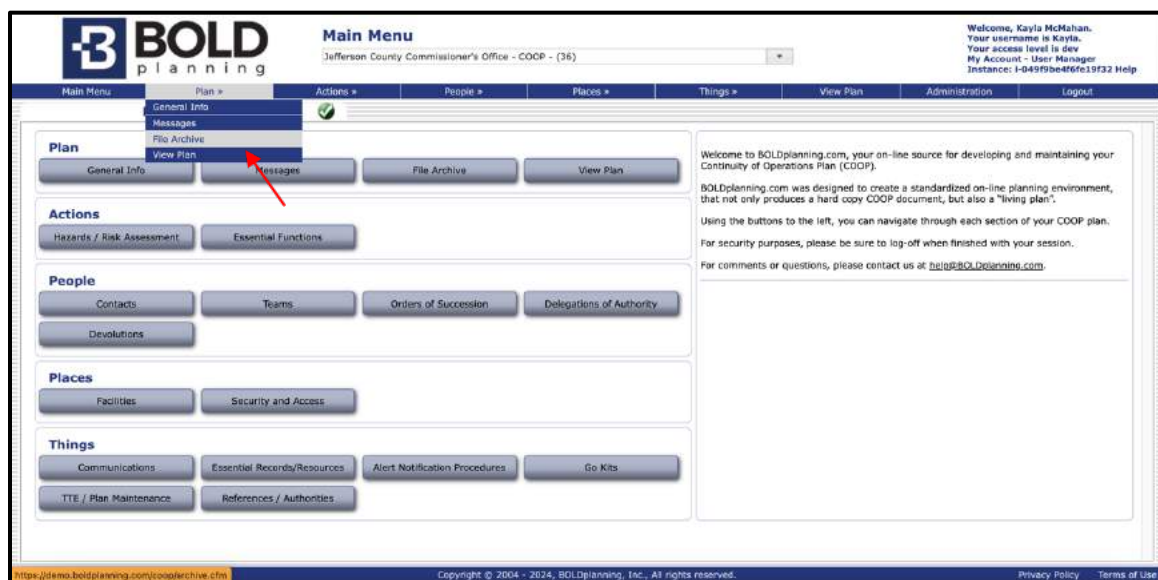
- Employee emergency contact information
- Spreadsheets of critical vendors/contacts
- Legal documents
- Maps of facilities
- Standard operating procedures

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.

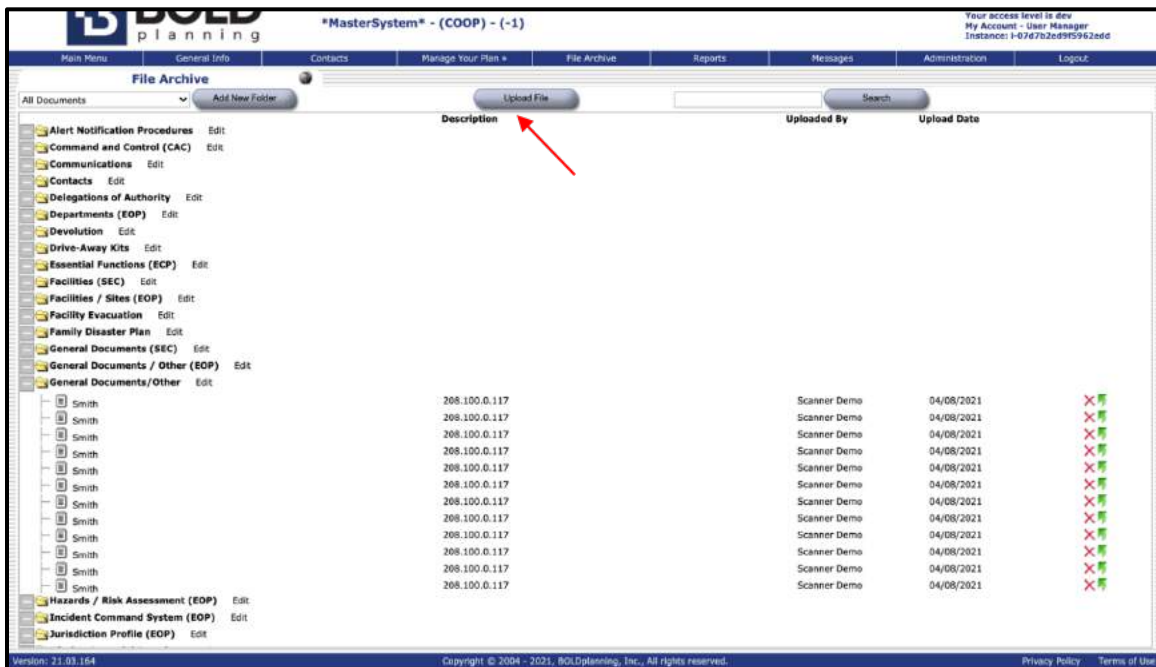
Attaching, Deleting, and Replacing a File in the File Archive

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



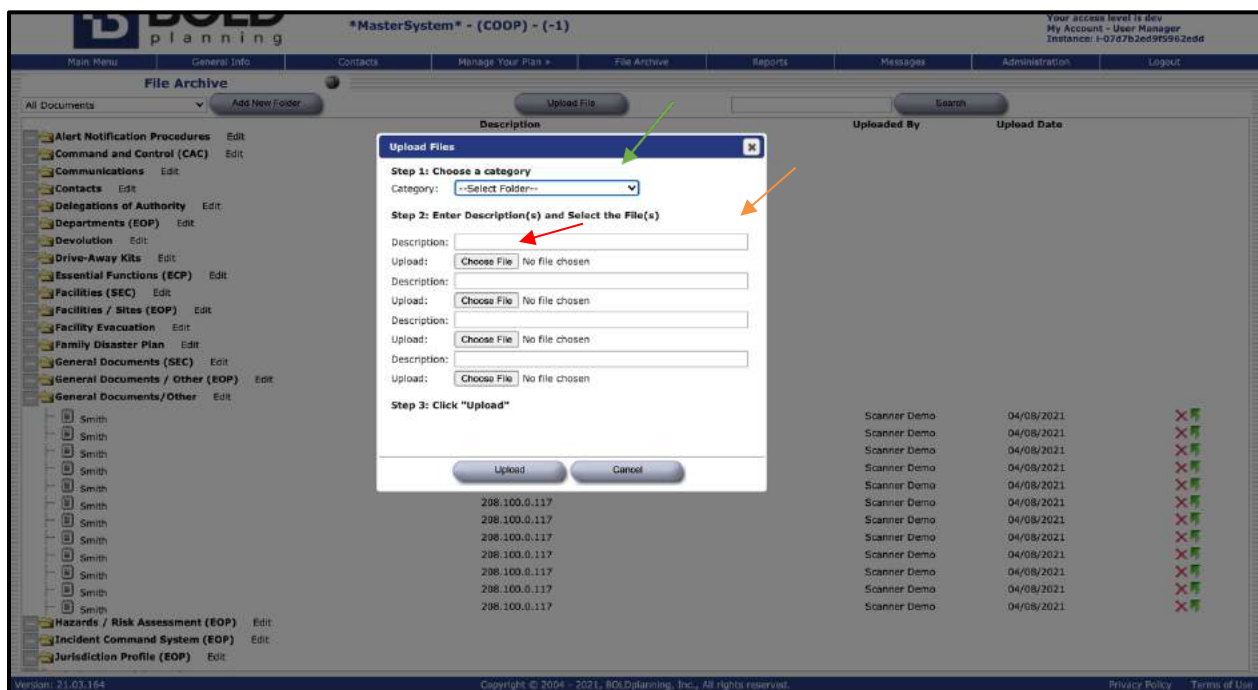
File Archive

- 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."



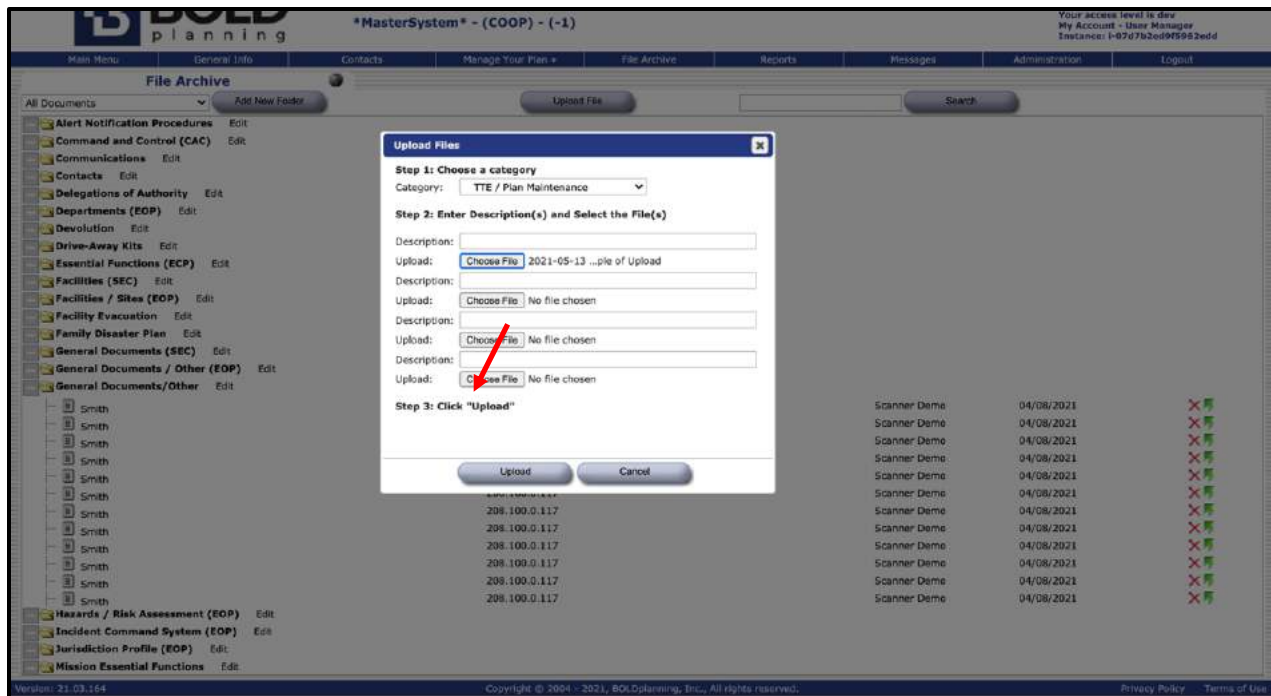
Uploading a file – File Archive

- 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.).



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.)



Uploading a file – File Archive

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

BOLDplanning File Archive
MasterSystem - (COOP) - (-1)

Welcome, Kayla McMahon.
Your username is Kayla.
Your access level is dev
My Account - User Manager
Instance: 1-d747b2ed99562edd

Main Menu | General Info | Contacts | Manage Your Plan | **File Archive** | Reports | Messages | Administration | Logout

File Archive

All Documents | Add New Folder | Upload File | Search

File Name	IP Address	User	Date	Status
Smith	208.100.0.117	Scanner Demo	04/08/2021	✗
Smith	208.100.0.117	Scanner Demo	04/08/2021	✗
Smith	208.100.0.117	Scanner Demo	04/08/2021	✗
Smith	208.100.0.117	Scanner Demo	04/08/2021	✗
Smith	208.100.0.117	Scanner Demo	04/08/2021	✗
Hazards / Risk Assessment (EOP)	Edit			
Incident Command System (EOP)	Edit			
Jurisdiction Profile (EOP)	Edit			
Mission Essential Functions	Edit			
Mutual Aids / MOU (EOP)	Edit			
Orders of Succession	Edit			
Pandemic Items	Edit			
Policies / Procedures (ECP)	Edit			
References / Authorities (EOP)	Edit			
Security and Access	Edit			
Successions / Authorities (EOP)	Edit			
Teams	Edit			
Test, Training, and Exercise	Edit			
TTE / Plan Maintenance (EOP)	Edit			
2021-05-13 BOLDplanning Example of Upload.docx		Site Administrator	05/14/2021	✗
Web Records	Edit			
Plan Reports Archive	Edit			
System Wide Reports Archive	Edit			
Help Files	Edit			
2019-10-22 BOLDplanning Cheat Sheet - User Manager.pdf	Quick Sheet: Adding/Editing/Deleting Users	Site Administrator	04/28/2021	✗
2019-12-16 BOLDplanning Cheat Sheet - Adding a Hyperlink.pdf	Adding a Hyperlink to a File in File Archive	Site Administrator	04/21/2021	✗
Continuity Help Files	Edit			
2020-03-10 Quick Sheet - Pandemic Planning.pdf	Quick Sheet - Pandemic Planning	Site Administrator	03/12/2020	✗
2020-07-13 Quick Sheet - Inline Images.pdf	Quick Sheet - Inline Images	Site Administrator	07/15/2020	✗
BOLDplanning Continuity Plan Maintenance Cycle.docx	Plan Maintenance Cycle Guide	Site Administrator	03/06/2020	✗
Continuity Webinar Trainings	Edit			
Adding an App Icon for phone/tablet		Site Administrator	12/02/2015	✗

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Uploading the correct file – File Archive

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

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.

The screenshot shows a web application interface for 'General Info'. The navigation bar includes: Main Menu, General Info, Contacts, Manage Your Plan, File Archive, Reports, Messages, Administration, and Logout. The main content area is titled 'General Info' and contains several sections:

- Mission Statement:** Two large text input areas with rich text editors.
- Supersession:** A text input field, highlighted with a red rectangular box.
- Is this plan active?:** Radio buttons for Yes (selected) and No.
- Is this plan locked (read-only)?** Radio buttons for Yes and No (selected).
- Is reporting disabled?:** Radio buttons for Yes and No (selected).
- Has this plan been formally approved?:** Radio buttons for Yes (selected) and No.
- Action Date:** A date input field with a calendar icon and a '(mm/dd/yyyy)' format hint.
- Expiration Date:** A date input field with a calendar icon and a '(mm/dd/yyyy)' format hint.
- What Organization is responsible for activating computers/systems at alternate facilities?:** A text input field with an example '(Smith County IT Department)'.
- What Organization is designated for Devolution?:** A text input field with an example '(Smith County IT Department)'.

At the bottom of the form are 'Save' and 'Cancel' buttons. The status bar at the very bottom shows 'Monday, 9/1/09 14:2' and 'Copyright © 2004 - 2009 BOLDplanning, Inc. All rights reserved.' and 'Release 9.0.0'.

Figure: General Info – Supersession

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

The screenshot shows the 'General Info' screen with the following fields and options:

- Mission Statement: Text area
- Supersession: Text area
- Is this plan active?: Yes No
- Is this plan locked (read-only)? Yes No
- Is reporting disabled? Yes No
- Has this plan been formally approved? Yes No
- Action Date: (mm/dd/yyyy)
- Expiration Date: (mm/dd/yyyy)
- What Organization is responsible for activating computers/systems at alternate facilities? Example: (Smith County IT Department)
- What Organization is designated for Devolution? (highlighted with a red box) Example: (Smith County IT Department)

Buttons: Save, Cancel

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.

The screenshot shows the 'General Info' screen with the following fields and options:

- Plan Type: COOP
- Master Plan: (dropdown)
- State: Arkansas (highlighted with a red box)
- Name of Organization: Text field
- Abbreviate Name of Organization? Yes No
- Mission Statement: Text area
- Supersession: Text area
- Is this plan active?: Yes No
- Is this plan locked (read-only)? Yes No
- Is reporting disabled? Yes No
- Has this plan been formally approved? Yes No

Buttons: Save, Cancel

Figure: Choose your State

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

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.

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.

The screenshot shows the 'General Info' form in the BOLDplanning COOP application. The form includes fields for Plan Type (COOP), Master Plan (DEMO Fulton County), State (Select), Name of Organization (DEMO Emergency Management), and Abbreviate Name of Organization? (Yes/No). The 'Department Head' dropdown menu is highlighted with a red box and shows 'Unassigned Person' selected. Below this are two large text entry boxes for the Mission Statement and Supervision, and a 'Is this plan active?' checkbox (Yes/No).

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.

This screenshot is identical to the one above, showing the 'General Info' form. In this view, the 'Primary Continuity Planner' dropdown menu is highlighted with a red box and shows 'Unassigned Person' selected. The 'Department Head' dropdown menu is also visible and shows 'Unassigned Person' selected.

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.

The screenshot shows the 'General Info' section of the BOLDplanning COOP interface. The form includes several dropdown menus and text input fields. The 'Mission Statement' field is highlighted with a red box. The form is titled 'General Info' and has a navigation bar at the top with options like 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The form fields include: Plan Type (COOP), Master Plan (DEMO Fulton County), State (Select), Name of Organization (DEMO Emergency Management), Abbreviate Name of Organization? (Yes/No), Department Head (Unassigned Person), Primary Continuity Planner (Unassigned Person), Mission Statement (highlighted), Supersession, and Is this plan active? (Yes/No).

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.

The screenshot shows the 'General Info' section of the BOLDplanning COOP interface. The form includes several dropdown menus and text input fields. The 'Supersession' field is highlighted with a red box. The form is titled 'General Info' and has a navigation bar at the top with options like 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The form fields include: Plan Type (COOP), Master Plan (DEMO Fulton County), State (Select), Name of Organization (DEMO Emergency Management), Abbreviate Name of Organization? (Yes/No), Department Head (Unassigned Person), Primary Continuity Planner (Unassigned Person), Mission Statement, Supersession (highlighted), and Is this plan active? (Yes/No).

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.

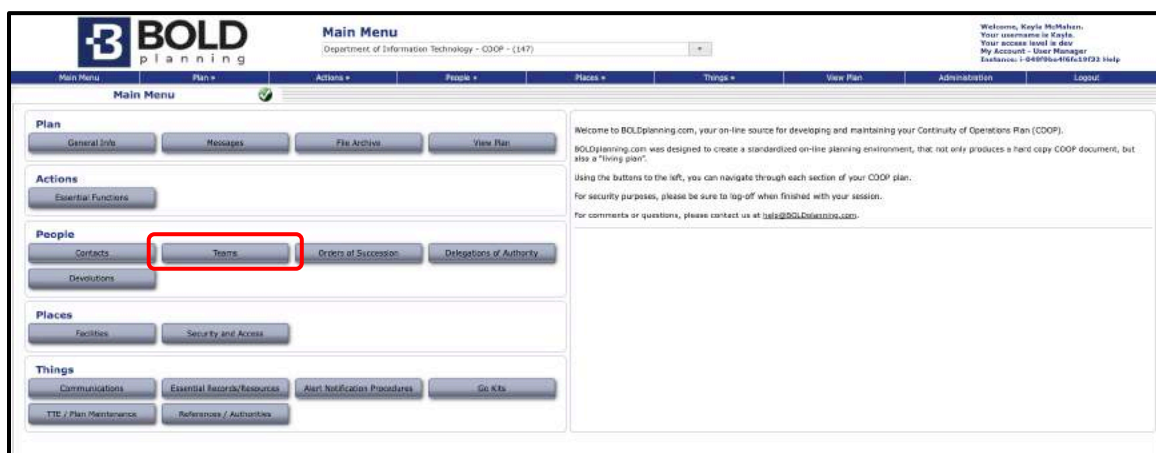


Figure: Main Menu – Teams

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

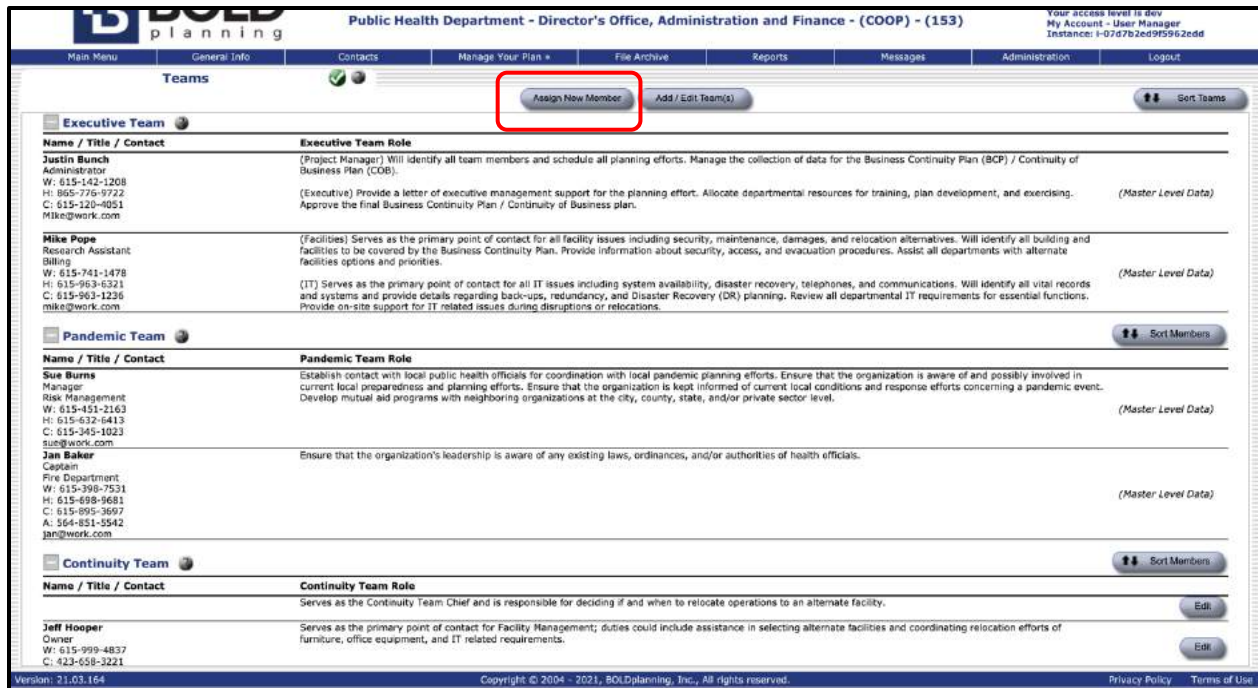


Figure: Assign New Member

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

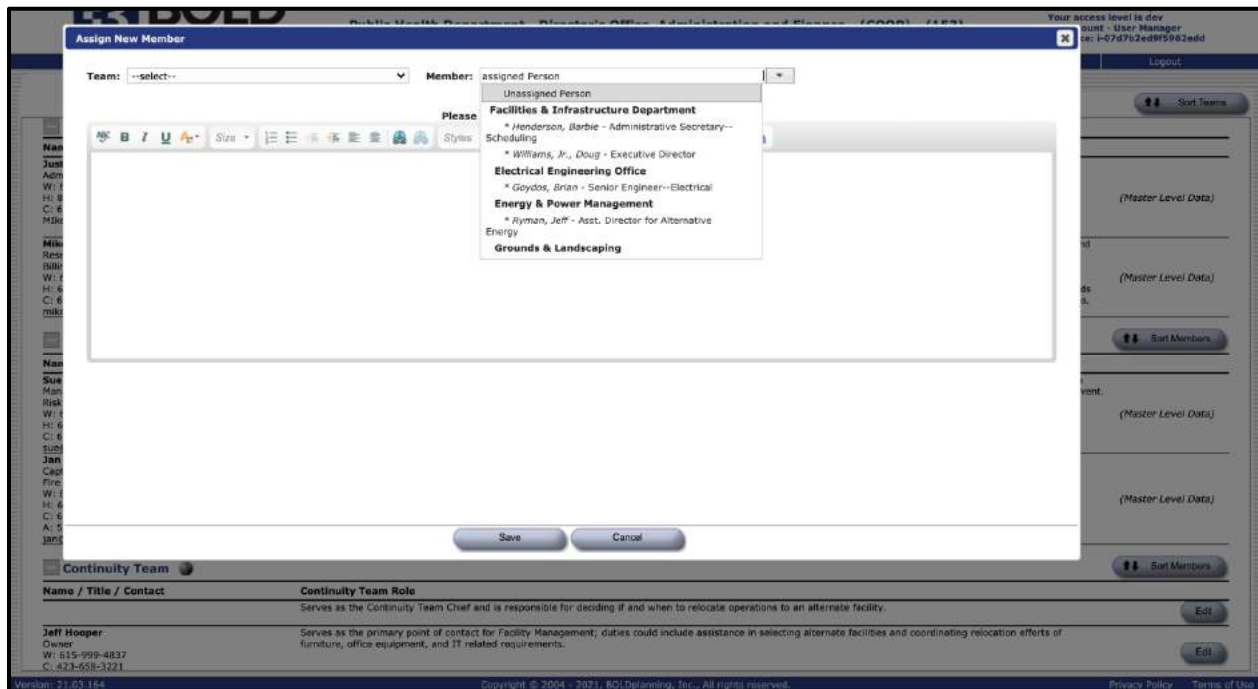


Figure: Member

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.

The screenshot shows a window titled "Assign New Member". At the top, there are two dropdown menus: "Team" (set to "Planning Team") and "Member" (set to "Ester, Sandra - Manager"). Below these are three rows of responsibilities, each with a checkbox on the right. The first two rows have unchecked checkboxes, while the third row has a checked checkbox. A red arrow points from the checked checkbox to a text area below. The text area is titled "Please Enter This Members Responsibility / Role" and contains the text: "Serves as the Planning Team Chief and is the primary point of contact for the development and overall maintenance of the continuity plan. Duties include identifying and managing Planning Team members, scheduling/conducting Planning Team meetings on a regular basis (recommended every 6 months), and scheduling/conducting trainings and exercises on an annual basis." At the bottom of the window are "Save" and "Cancel" buttons.

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.

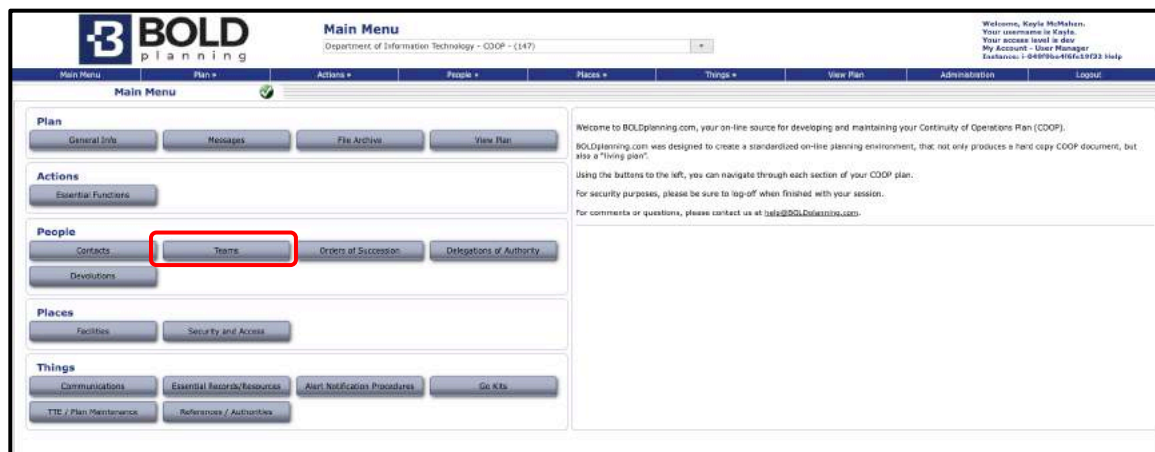


Figure: Teams/Main Menu

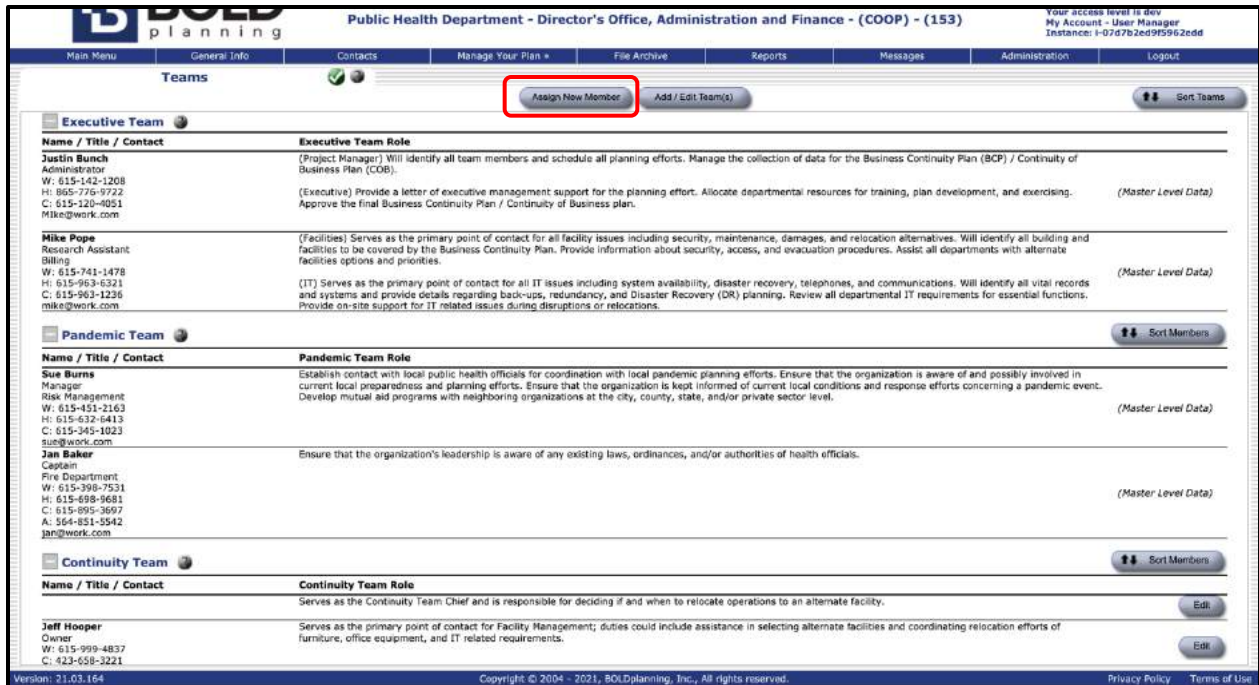


Figure: Assign New Member

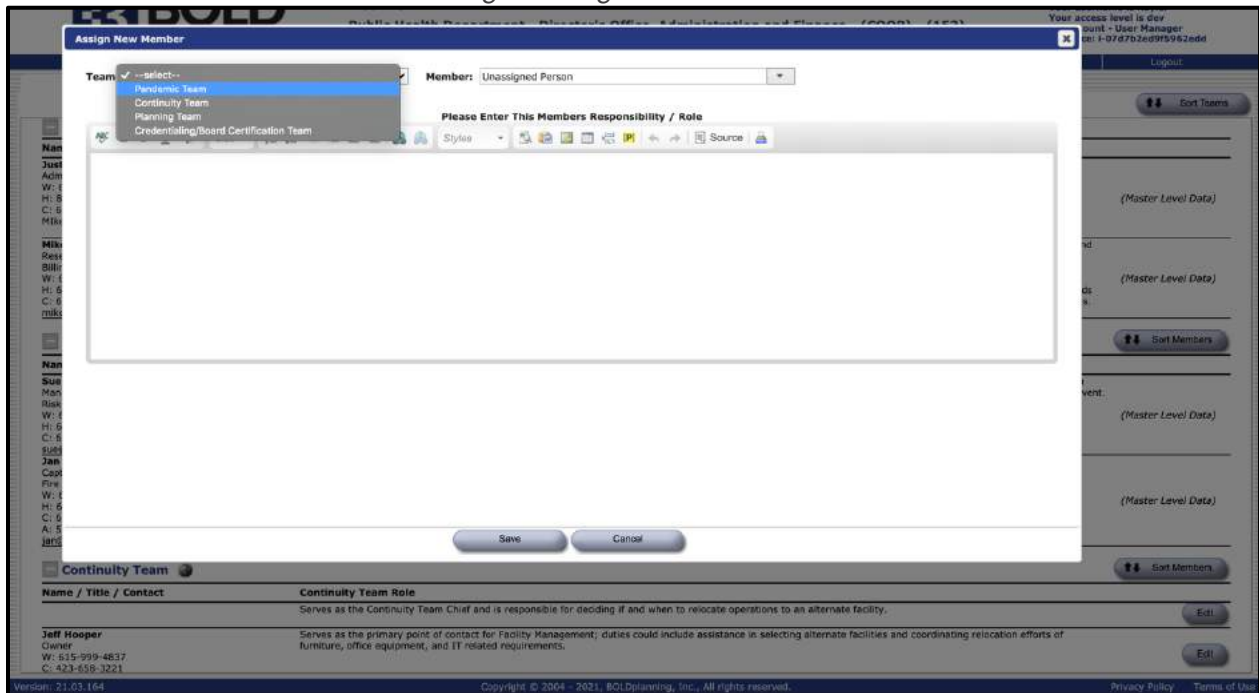


Figure: Assigning Members to a Team

Assign New Member

Team: Planning Team Member: Ester, Sandra - Manager

Responsible for developing the draft version of the plan and participating in the on-going maintenance of the plan over time.

Responsible for officially reviewing and formally approving the finalized continuity plan on an annual basis.

Serves as the Planning Team Chief and is the primary point of contact for the development and overall maintenance of the continuity plan. Duties include identifying and managing Planning Team members, scheduling/conducting Planning Team meetings on a regular basis (recommended every 6 months), and scheduling/conducting trainings and exercises on an annual basis.

Please Enter This Members Responsibility / Role

Serves as the Planning Team Chief and is the primary point of contact for the development and overall maintenance of the continuity plan. Duties include identifying and managing Planning Team members, scheduling/conducting Planning Team meetings on a regular basis (recommended every 6 months), and scheduling/conducting trainings and exercises on an annual basis.

Save Cancel

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.

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.

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

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

Work: 312-743-1190 Work Email: bwagner@monroe.gov	
Bob Reynolds - Facility Coordinator Monroe Police Dept. Operations Work: 321-543-6543 Home: 566-788-7654 Work Email: bob@monroe.gov Personal Email: bob@gmail.com	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.

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.

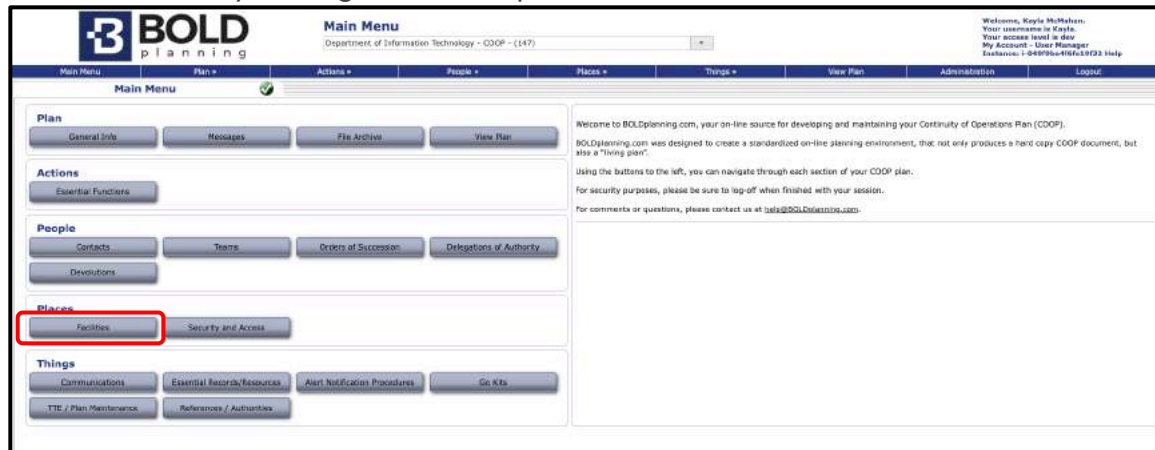


Figure: Main Menu – Facilities



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.

The screenshot shows the 'Facilities' page in the BOLDplanning COOP system. The page title is 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)'. The user's access level is 'User Manager' with instance '1-07d7b2ed49f9562edd'. The main menu includes 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The 'Facilities' section has buttons for 'Add New Facility', 'Import Facilities' (highlighted), 'Backup Facilities', and 'Import From Excel'. Below this is a search/filter section and a list of facilities. The 'Primary Facility' section includes two entries: '*Data Center (45 staff)' and '*Public Health Department Headquarters (34 staff)'. Each entry shows a choice of alternate facilities and the number of relocating staff. The 'Alternate Facility' section lists two facilities: '*Data Center' and '*Public Health Department Headquarters'. The footer contains the email 'mailto:marie@work.com', copyright information 'Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.', and links for 'Privacy Policy' and 'Terms of Use'.

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.

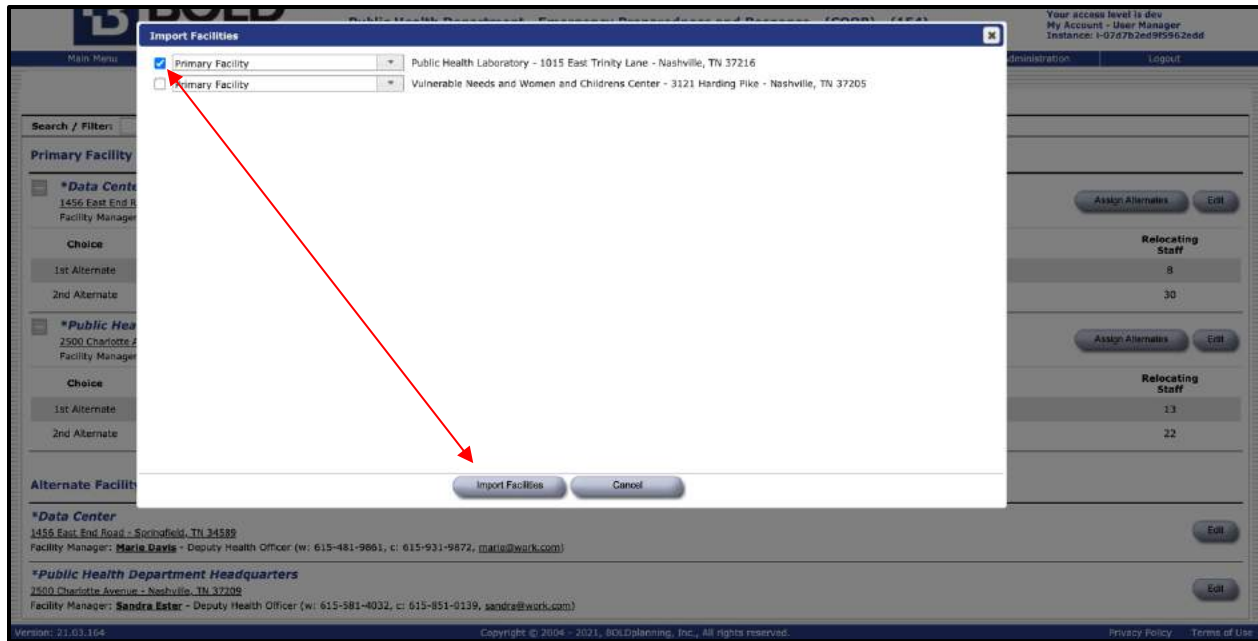


Figure: Importing Primary Facilities

5. **Important:** This import process can take a few seconds to complete. Do not 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.

Public Health Department - Emergency Preparedness and Response - (COOP) - (154)

Your access level is dev
My Account - User Manager
Instance: 1-07d7b2ed9f95962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Facilities

Search / Filter: All

Primary Facility

*Data Center (45 staff)
1456 East End Road - Springfield, TN 34589
Facility Manager: **Marie Davis** - Deputy Health Officer (w: 615-481-9861, c: 615-931-9872, marie@work.com)

Choice	Alternate Facility	Relocating Staff
1st Alternate	*Public Health Department Headquarters - 2500 Charlotte Avenue - Nashville, TN 37209	8
2nd Alternate	*Southside WIC Nutrition Center - 3718 Nolensville Pike - Nashville, TN 37211	30

*Public Health Department Headquarters (34 staff)
2500 Charlotte Avenue - Nashville, TN 37209
Facility Manager: **Sandra Ester** - Deputy Health Officer (w: 615-581-4032, c: 615-851-0139, sandra@work.com)

Choice	Alternate Facility	Relocating Staff
1st Alternate	*Data Center - 1456 East End Road - Springfield, TN 34589	13
2nd Alternate	*Southside WIC Nutrition Center - 3718 Nolensville Pike - Nashville, TN 37211	22

Alternate Facility

*Data Center
1456 East End Road - Springfield, TN 34589
Facility Manager: **Marie Davis** - Deputy Health Officer (w: 615-481-9861, c: 615-931-9872, marie@work.com)

*Public Health Department Headquarters
2500 Charlotte Avenue - Nashville, TN 37209
Facility Manager: **Sandra Ester** - Deputy Health Officer (w: 615-581-4032, c: 615-851-0139, sandra@work.com)

mailto:marie@work.com | Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved. | Privacy Policy | Terms of Use

Figure: Editing Primary Facilities

Public Health Department - Emergency Preparedness and Response - (COOP) - (154)

Your access level is dev
My Account - User Manager
Instance: 1-07d7b2ed9f95962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Facilities

Facility Type: Primary Facility, Alternate Facility

Facility Name: Data Center

Address: 1456 East End Road

View Map

City: Springfield

State: Tennessee

Zipcode: 34589

of Your Staff at Facility: 45

Facility Manager: Davis, Marie - Deputy Health Officer

Facility Comments:

Save | Cancel | Delete | Facility Resources

Figure: Save - Facilities

9. Fill in the total number of employees at this facility.
10. Fill in the facility manager for your facility.
11. 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.

The screenshot shows the 'Facilities' form in the BOLDplanning COOP system. The form is titled 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)'. It includes a navigation menu at the top with options like 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The form fields are as follows:

- Facility Type: Primary Facility, Alternate Facility
- Facility Name: Data Center
- Address: 1456 East End Road
- City: Springfield
- State: Tennessee
- Zipcode: 34589
- # of Your Staff at Facility: 45
- Facility Manager: Davis, Marie - Deputy Health Officer

At the bottom of the form, there are four buttons: 'Save', 'Cancel', 'Delete', and 'Facility Resources'. The 'Facility Resources' button is highlighted with a red box.

Figure: Facility Resources

The screenshot shows the 'Edit Resources' form in the BOLDplanning COOP system. The form is titled 'Edit Resources' and includes a table with the following columns: Qty, Description, Type, and Disposition. The table contains two rows of data:

Qty	Description	Type	Disposition
1	Chair	Furniture	Pre-Positioned
1	Desk	Furniture	Pre-Positioned

At the bottom of the form, there are three buttons: 'Save', 'Cancel', and 'Import Resources'. The 'Save' button is highlighted with a red box. A green plus sign button is also highlighted with a red box in the top right corner of the table area.

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.

The screenshot shows the BOLDplanning COOP interface for the Public Health Department - Emergency Preparedness and Response - (COOP) - (154). The 'Facilities' page is active, and the 'Add New Facility' button is highlighted with a red box. The page displays a list of facilities, including 'Data Center' and 'Public Health Department Headquarters', with details such as address, staff count, and facility manager.

Choice	Alternate Facility	Relocating Staff
1st Alternate	*Public Health Department Headquarters - 2500 Charlotte Avenue - Nashville, TN 37209	8
2nd Alternate	*Southside WIC Nutrition Center - 3718 Nolensville Pike - Nashville, TN 37211	30
1st Alternate	*Data Center - 1456 East End Road - Springfield, TN 34589	13
2nd Alternate	*Southside WIC Nutrition Center - 3718 Nolensville Pike - Nashville, TN 37211	22

Figure: Adding New Facility Without Import

The screenshot shows the BOLDplanning COOP interface for the Public Health Department - Emergency Preparedness and Response - (COOP) - (154). The 'Add New Facility' form is displayed, with fields for Facility Type, Facility Name, Address, City, State, Zipcode, # of Your Staff at Facility, Facility Manager, and Facility Comments. The 'Save' button is highlighted.

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.

The screenshot shows the 'Facilities' management interface. At the top, there's a navigation bar with 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. Below this is a search filter set to 'All'. The main content area is divided into sections for 'Primary Facility' and 'Alternate Facility'. Each facility entry includes its name, staff count, address, and facility manager. The 'Data Center' entry has an 'Edit' button highlighted in red. The 'Public Health Department Headquarters' entry also has an 'Edit' button. A table below each primary facility lists alternate facilities with their respective staff counts for relocation.

Choice	Alternate Facility	Relocating Staff
1st Alternate	*Public Health Department Headquarters - 2500 Charlotte Avenue - Nashville, TN 37209	8
2nd Alternate	*Southside WIC Nutrition Center - 3718 Nolensville Pike - Nashville, TN 37211	30
1st Alternate	*Data Center - 1456 East End Road - Springfield, TN 34589	13
2nd Alternate	*Southside WIC Nutrition Center - 3718 Nolensville Pike - Nashville, TN 37211	22

Figure: Editing/Deleting Facility

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

The screenshot shows the 'Facilities' management interface. At the top, there is a navigation bar with options like 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The main content area is titled 'Facilities' and contains a form for editing a facility. The form fields are as follows:

- Facility Type: Primary Facility, Alternate Facility (dropdown)
- Facility Name: Data Center (text input)
- Address: 1456 East End Road (text input)
- View Map (button)
- City: Springfield (text input)
- State: Tennessee (dropdown)
- Zipcode: 34589 (text input)
- # of Your Staff at Facility: 45 (text input)
- Facility Manager: Davis, Marie - Deputy Health Officer (dropdown)
- Facility Comments: (text area)

At the bottom of the form, there are four buttons: 'Save', 'Cancel', 'Delete', and 'Facility Resources'. The 'Delete' button is highlighted with a red box.

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.

The screenshot shows the 'Facilities' form in the BOLDplanning COOP system. The form includes fields for Facility Type, Facility Name, Address, City, State, Zipcode, # of Your Staff at Facility, and Facility Manager. The Facility Manager dropdown menu is open, showing a list of staff members under various departments: Director's Office, Division of Minority Health and Disparity Elimination, and Emergency Preparedness and Response. At the bottom of the form, there are buttons for Save, Cancel, and Facility Resources.

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.

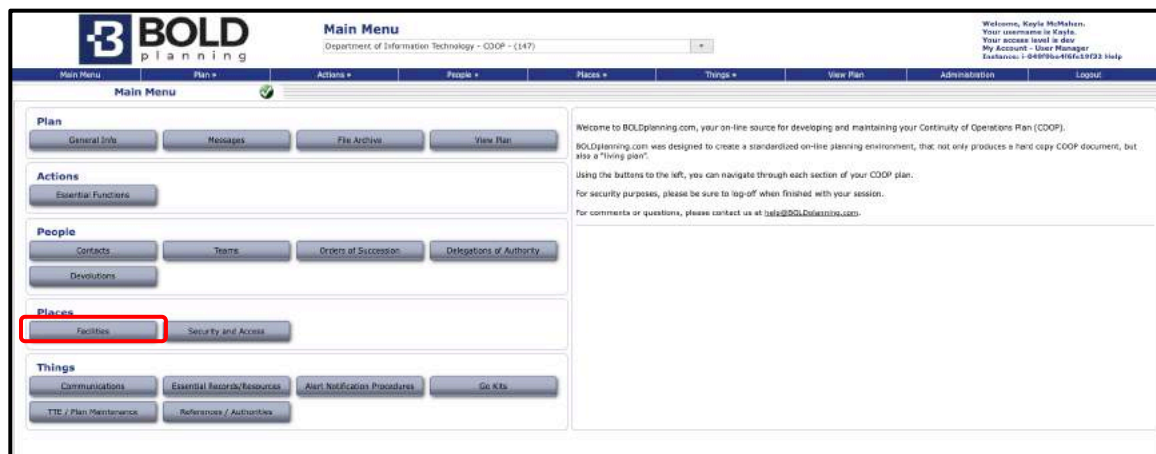


Figure: Main Menu – Facilities

2. Click on the “Import Facilities” button.

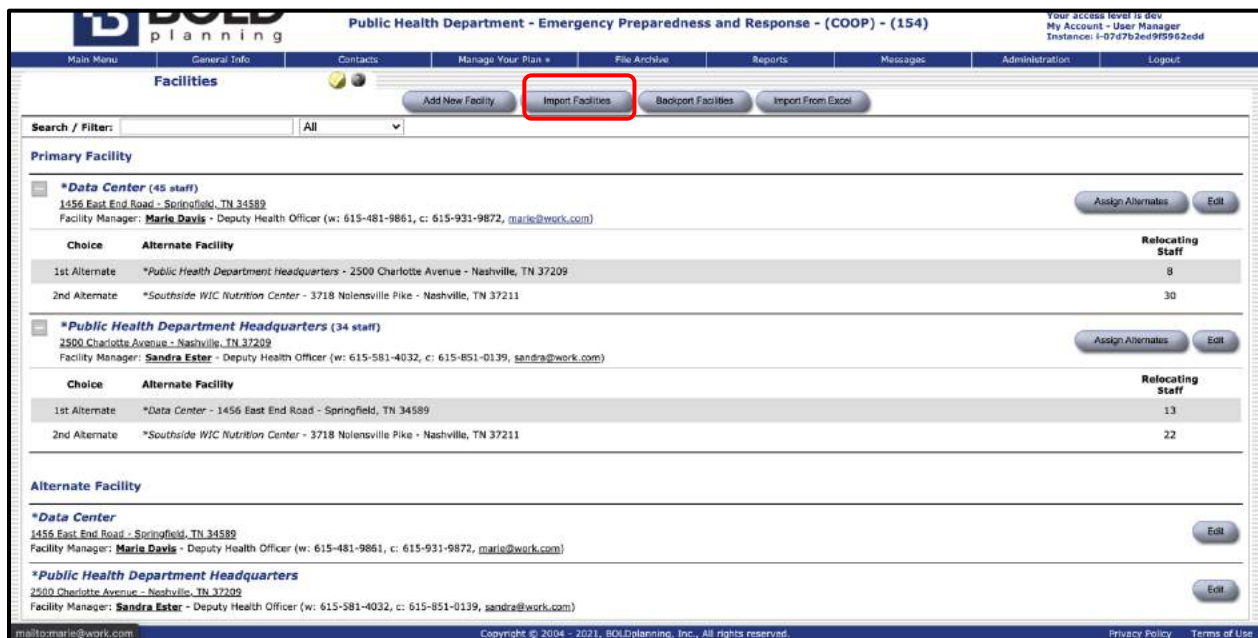


Figure: Importing Facilities

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

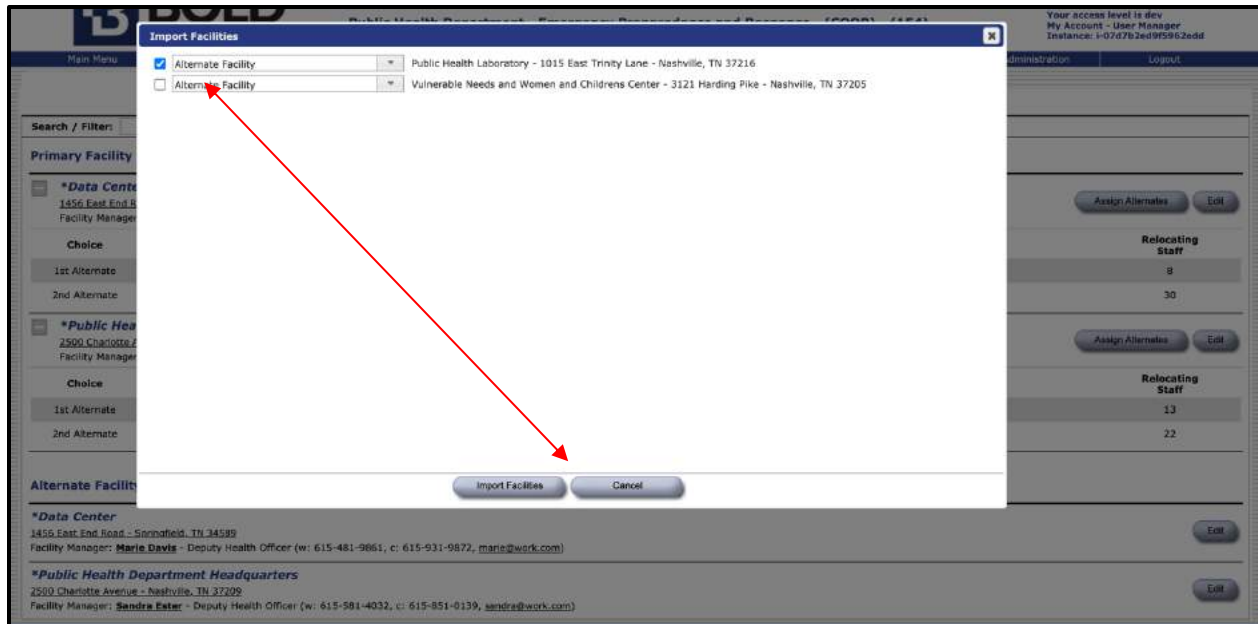


Figure: Importing Alternate Facilities



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

The screenshot shows the 'Facilities' page in the BOLDplanning COOP system. The page is titled 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)'. It features a navigation menu with options like 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The main content area is divided into 'Primary Facility' and 'Alternate Facility' sections. Under 'Primary Facility', there are two entries: '*Data Center (45 staff)' and '*Public Health Department Headquarters (34 staff)'. Each entry has an 'Assign Alternates' button and an 'Edit' button. The 'Edit' button for the '*Data Center' entry is circled in red. The 'Alternate Facility' section also lists the same two facilities, each with an 'Edit' button.

Figure: Editing Alternate Facilities

- 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.

The screenshot shows the 'Facilities' page in the BOLDplanning COOP system, similar to the previous one. The 'Assign Alternates' button for the '*Public Health Department Headquarters (34 staff)' entry is circled in red. The page layout and content are consistent with the previous screenshot, showing the same navigation menu and facility details.

Figure: Assigning Alternate Facilities to Primary Facilities

- 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.

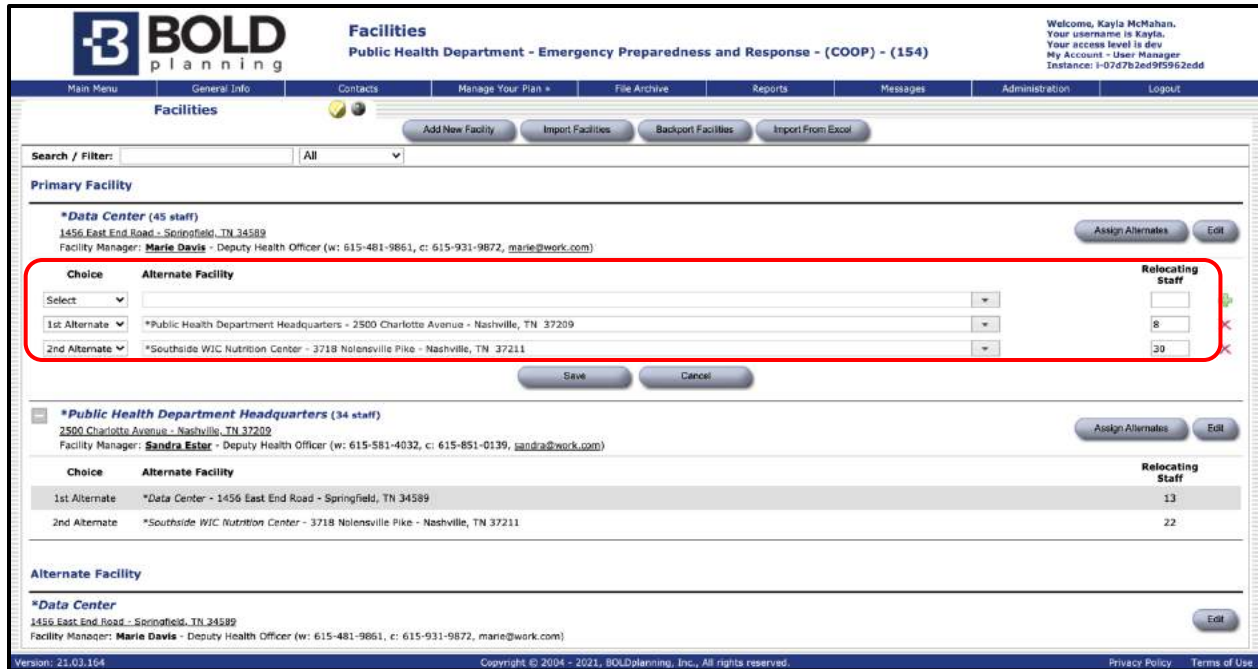


Figure: Assigning Alternate Facilities to Primary Facilities Drop-Down Menus

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



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

10. 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.

The screenshot shows the 'Facilities' management page in the BOLDplanning COOP system. The page title is 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)'. The user's access level is 'dev' and they are logged in as 'My Account - User Manager' with instance '1-07d7b2ed9f5962add'. The main menu includes 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The 'Facilities' section is active, showing a form for editing a facility. The form fields are: Facility Type (Primary Facility, Alternate Facility), Facility Name (Data Center), Address (1456 East End Road), City (Springfield), State (Tennessee), Zipcode (34589), # of Your Staff at Facility (45), and Facility Manager (Davis, Marie - Deputy Health Officer). There is a 'View Map' link and a 'Facility Comments' text area. At the bottom, there are buttons for 'Save', 'Cancel', 'Delete', and 'Facility Resources'. The 'Facility Resources' button is highlighted with a red rectangle.

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 pre-positioned or transported.

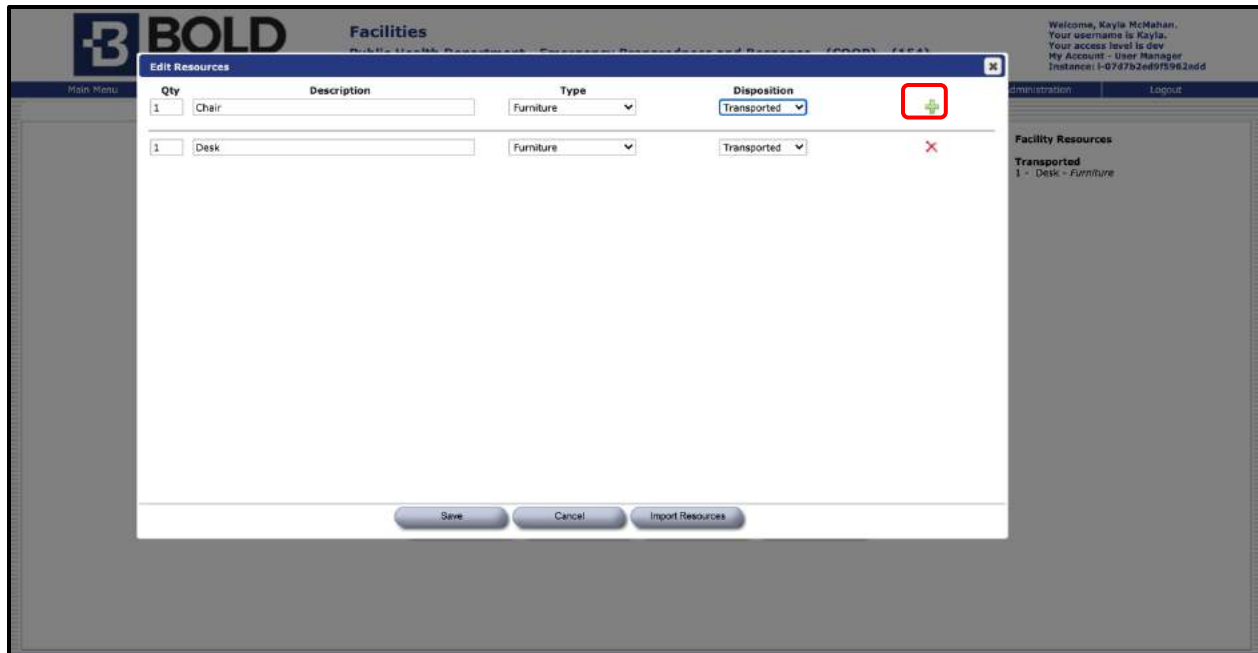


Figure: Adding Resources

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.



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.

The screenshot shows the 'Facilities' form in the BOLDplanning COOP application. The form is titled 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)'. It includes the following fields and controls:

- Facility Type:** A dropdown menu with 'Select Above' as the current selection.
- Facility Name:** A text input field.
- Address:** Multiple text input fields for the address.
- City:** A text input field.
- State:** A dropdown menu with 'Select' as the current selection.
- Zipcode:** A text input field.
- # of Your Staff at Facility:** A text input field.
- Facility Manager:** A dropdown menu with 'Unassigned Person' as the current selection.
- Facility Comments:** A large text area for entering comments.
- Buttons:** 'Save', 'Cancel', and 'Facility Resources' buttons are located at the bottom of the form.

The form is highlighted with a red rounded rectangle. The application header includes the BOLDplanning logo, the title 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)', and user information: 'Your Access level is dev', 'My Account - User Manager', and 'Instance: I-0747b2ed9f9f962edd'. The footer includes 'Version: 21.03.164', 'Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.', and '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
<p>Monroe County Fire Headquarters - Primary Facility 270 Main Street South Monroe City, PA 15237 USA Staff Relocating: 25 out of 36</p> <hr/> <p>Alternate Facility (1st Choice)</p> <p>Williams Complex 2100 Kings Highway South Monroeville, PA 15101</p> <p><u>Facility Manager:</u> Paul Rogers w: 344-544-5544</p>	<p>Transported 100 - Boxes and Labels - <i>Office Supplies</i> 1 - Projectors - <i>Computer Hardware</i> 3 - Copy Machines - <i>Computer Hardware</i> 4 - Laptops - <i>Computer Hardware</i> 4 - Telephones - <i>Communications</i> 12 - Satellite Phones - <i>Communications</i> 12 - Phones - <i>Communications</i> 2 - fax machines - <i>Communications</i> 12 - Phones - <i>Communications</i></p> <p>Pre-Positioned 1 - Shipping Machine - <i>Office Supplies</i> 12 - Desks / Chairs - <i>Furniture</i> 2 - Printers - <i>Computer Hardware</i></p>
<p>Monroe County Fire Headquarters - Primary Facility 270 Main Street South Monroe City, PA 15237 USA Staff Relocating: - out of 36</p> <hr/> <p>Alternate Facility (2nd Choice)</p> <p>Wexford Complex 1220 Greeley Street Monroe, FL 45245</p> <p><u>Facility Manager:</u> Fran Wills w: 615-334-9090</p>	<p>Transported 12 - Desks - <i>Furniture</i> 4 - Main Hook Ladders - <i>Emergency Equipment</i> 3 - Generators - <i>Emergency Equipment</i> 3 - Copy Machines (COLOR) - <i>Computer Hardware</i> 10 - Desktop/Laptop Computers - <i>Computer Hardware</i> 6 - Walkie Talkies - <i>Communications</i> 1 - VHF Base Station USMS & FBI Frequencies - <i>Communications</i> 5 - Satellite Phones - <i>Communications</i> 1 - Copy/Fax Machine - <i>Communications</i> 14 - Phones - <i>Communications</i></p> <p>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></p>

* 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.

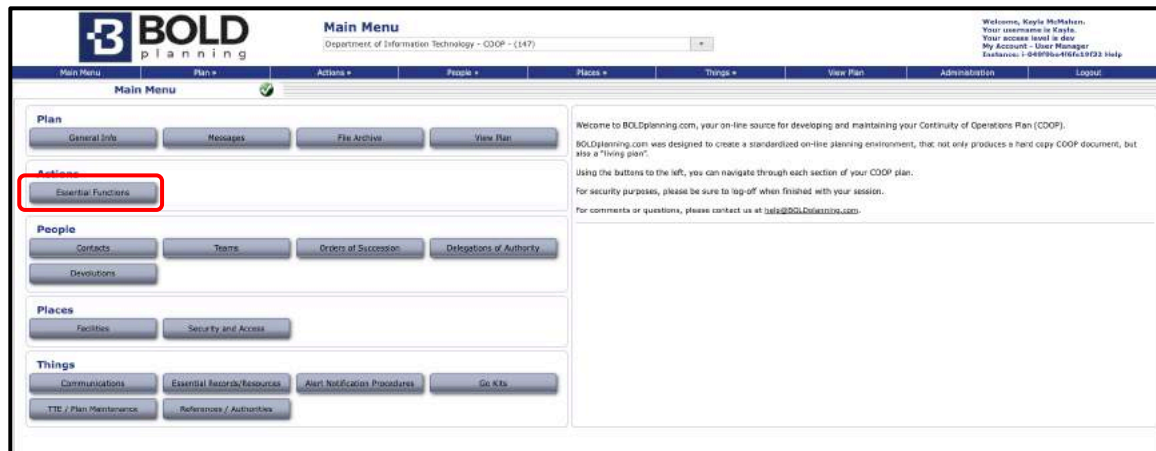


Figure: Main Menu

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

The screenshot shows the 'Essential Functions' page in the BOLDplanning COOP system. The page title is 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)'. The user's access level is 'dev'. The page is divided into three tiers of functions, each with a table of priority, function description, and department/division. The 'Add New Function' button is highlighted with a red box.

Priority	Function	Department / Division
#1	"Act as liaison between OEM and other county, state, and federal agencies"	Public Health Department - Emergency Preparedness and Response
#2	"Coordinate emergency services with NGO, non-profit or religious organizations."	Public Health Department - Emergency Preparedness and Response
#3	Document incident activities	Public Health Department - Emergency Preparedness and Response
#4	Initiate response actions during emergencies	Public Health Department - Emergency Preparedness and Response
#5	Maintain 24 hour staff duty line.	Public Health Department - Emergency Preparedness and Response

Figure: Add New Function

The screenshot shows the 'Please Enter the Essential Function' dialog box in the BOLDplanning COOP system. The dialog box is open, and the 'Tier' dropdown menu is selected, showing 'Tier 1 - Functions to be performed, given a One Day disruption. (Highest priority to low...'. The 'Organizational Unit' dropdown menu is also selected, showing 'Public Health Department - Emergency Preparedness and Response'. The 'Is this a PMEF?' dropdown menu is selected, showing 'No'. The 'Function Type (Extra Field)' dropdown menu is selected, showing 'Select'. The 'Save' and 'Cancel' buttons are visible at the bottom of the dialog box.

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.)

The screenshot displays the 'Essential Functions' form within the BOLDplanning COOP interface. The form is titled 'Please Enter the Essential Function' and contains several input fields and buttons. On the right side, there are six buttons: 'Function', 'Link Pools', 'Link Visual Resources', 'Link Facilities', 'Link Hazards / Risks', and 'Enhanced BIA'. Three colored arrows (red, orange, and blue) point to the 'Function', 'Organizational Unit', and 'Is this a PMEF?' fields respectively. The form also includes a 'Tier' dropdown menu, an 'Organizational Unit' dropdown menu, and a 'Function Type (Extra Field)' dropdown menu. The 'Save' and 'Cancel' buttons are located at the bottom of the form.

Figure: Linking Essential Functions

- 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).

Link People

Public Health Department - Emergency Preparedness and Response - (COOP) - (154)

Your access level is dev
My Account - User Manager
ID: 1-076782ced95562eadd

Logout

Director's Office

- 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

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Figure: Linking People to Essential Functions

- Click in the box to the left of the contact(s) you wish to link to this mission-essential function.
- Click “Save.”
- 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 free-form data entry box.

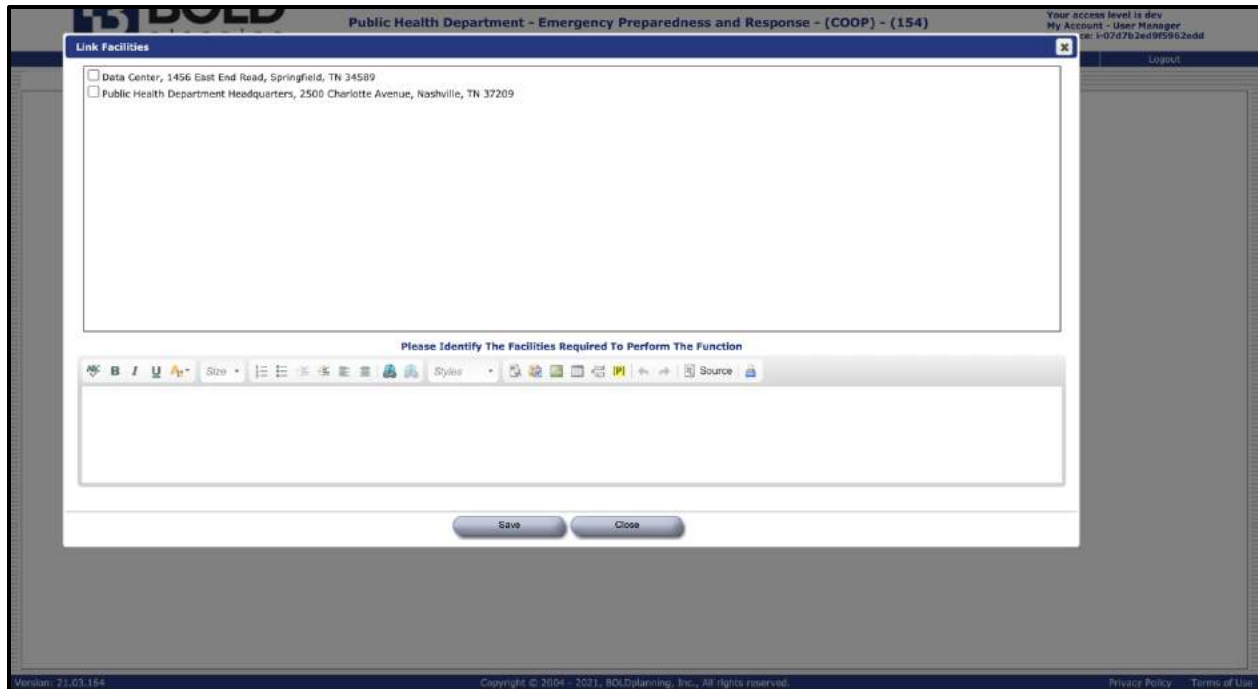


Figure: Linking Facilities

12. 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.

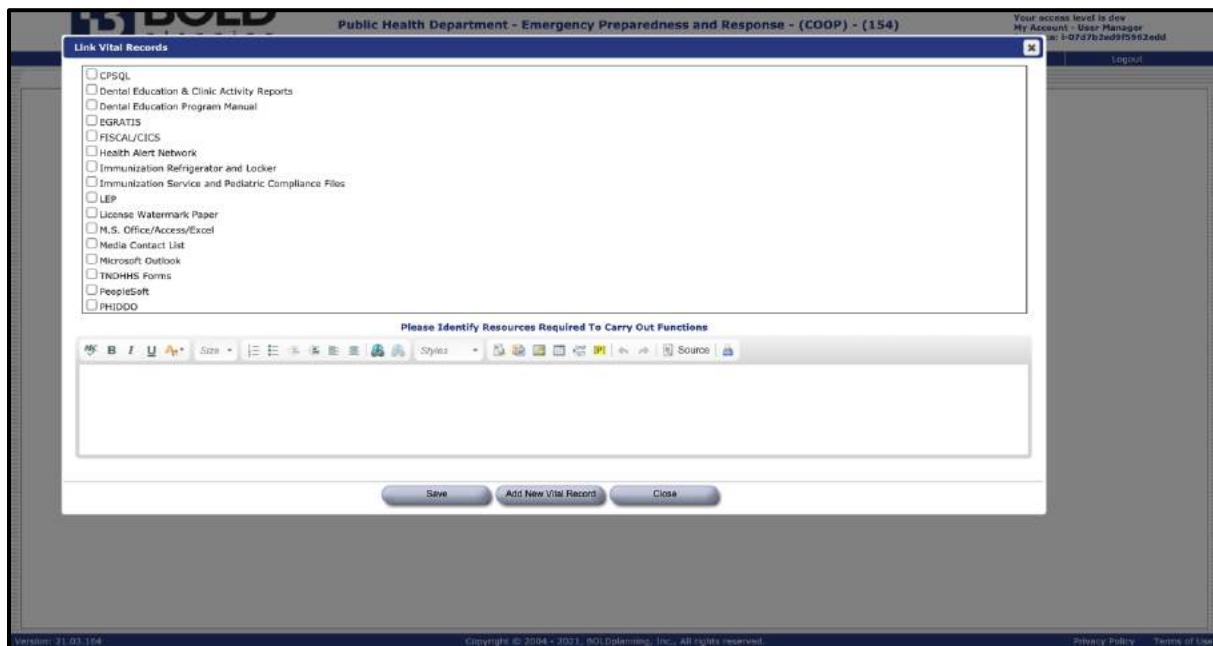


Figure: Linking Essential Resources

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” text 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, re-prioritize (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.”

Public Health Department - Emergency Preparedness and Response - (COOP) - (154)

Your access level is dev
My Account - User Manager
Instance: 1-0767b2ed9f9592edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Essential Functions

Add New Tier | Add New Function | View all by Tier (default)

Tier 1 - Functions to be performed, given a One Day disruption. (Highest priority to lowest)

Priority	Function	Department / Division	
#1	"Act as liaison between OEM and other county, state, and federal agencies"	Public Health Department - Emergency Preparedness and Response	Edit/View
#2	"Coordinate emergency services with NGO, non-profit or religious organizations."	Public Health Department - Emergency Preparedness and Response	Edit/View
#3	Document incident activities	Public Health Department - Emergency Preparedness and Response	Edit/View
#4	Initiate response actions during emergencies	Public Health Department - Emergency Preparedness and Response	Edit/View
#5	Maintain 24 hour staff duty line.	Public Health Department - Emergency Preparedness and Response	Edit/View

Tier 2 - Functions to be performed, given a One Day - One Week disruption. (Highest priority to lowest)

Priority	Function	Department / Division	
#1	Coordinate with local meteorologists on developing weather.	Public Health Department - Emergency Preparedness and Response	Edit/View
#2	Monitor county facilities and public works for irregularities in service delivery.	Public Health Department - Emergency Preparedness and Response	Edit/View
#3	Receive incoming emergency notification calls	Public Health Department - Emergency Preparedness and Response	Edit/View
#4	Support PIO in notification mechanisms for public information systems.	Public Health Department - Emergency Preparedness and Response	Edit/View

Tier 3 - Functions to be performed, given a One Week - One Month disruption. (Highest priority to lowest)

Priority	Function	Department / Division	
#1	Conduct community-based training	Public Health Department - Emergency Preparedness and Response	Edit/View
#2	Conduct professional development training	Public Health Department - Emergency Preparedness and Response	Edit/View
#3	Coordinate with regional partners	Public Health Department - Emergency Preparedness and Response	Edit/View
#4	Perform HSEEP exercises.	Public Health Department - Emergency Preparedness and Response	Edit/View

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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.

Public Health Department - Emergency Preparedness and Response - (COOP) - (154)

Your access level is dev
My Account - User Manager
Instance: 1-0767b2ed9f9592edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Essential Functions

Add New Tier | Add New Function | View all by Tier (default)

Tier 1 - Functions to be performed, given a One Day disruption. (Highest priority to lowest)

Priority	Function	Department / Division	
#1	"Act as liaison between OEM and other county, state, and federal agencies"	Public Health Department - Emergency Preparedness and Response	Edit/View
#2	"Coordinate emergency services with NGO, non-profit or religious organizations."	Public Health Department - Emergency Preparedness and Response	Edit/View
#3	Document incident activities	Public Health Department - Emergency Preparedness and Response	Edit/View
#4	Initiate response actions during emergencies	Public Health Department - Emergency Preparedness and Response	Edit/View
#5	Maintain 24 hour staff duty line.	Public Health Department - Emergency Preparedness and Response	Edit/View

Tier 2 - Functions to be performed, given a One Day - One Week disruption. (Highest priority to lowest)

Priority	Function	Department / Division	
#1	Coordinate with local meteorologists on developing weather.	Public Health Department - Emergency Preparedness and Response	Edit/View
#2	Monitor county facilities and public works for irregularities in service delivery.	Public Health Department - Emergency Preparedness and Response	Edit/View
#3	Receive incoming emergency notification calls	Public Health Department - Emergency Preparedness and Response	Edit/View
#4	Support PIO in notification mechanisms for public information systems.	Public Health Department - Emergency Preparedness and Response	Edit/View

Tier 3 - Functions to be performed, given a One Week - One Month disruption. (Highest priority to lowest)

Priority	Function	Department / Division	
#1	Conduct community-based training	Public Health Department - Emergency Preparedness and Response	Edit/View
#2	Conduct professional development training	Public Health Department - Emergency Preparedness and Response	Edit/View
#3	Coordinate with regional partners	Public Health Department - Emergency Preparedness and Response	Edit/View
#4	Perform HSEEP exercises.	Public Health Department - Emergency Preparedness and Response	Edit/View

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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

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

FUNCTION: "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

FUNCTION: "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

TIER: 2: Functions to be performed, given a one-day to one-week disruption (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**FUNCTION: 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–OSIS; 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

FUNCTION: 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

TIER: 3: Functions to be performed, given a one-week to one-month disruption (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-OSIS; 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

- 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.

Primary	Administrator	Chief Executive Office		Justin Bunch	(Master Level Data)
Leadership Succession for Executive Director.					
					Sort 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 Delete
Leadership Succession for Primary Continuity Planner.					
					Sort Succession
Position	Title	Department	Division	Name (position currently held by)	Add New Member
Primary	Analyst	Finance & Administration	Financial Reporting Office	Bertram Colpack	Edit Delete
#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 Delete
Edit Succession					

Figure: Primary Under Executive Director

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

Primary	Administrator	Chief Executive Office		Justin Bunch	(Master Level Data)
Leadership Succession for Executive Director.					
					Sort 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 Delete
Leadership Succession for Primary Continuity Planner.					
					Sort Succession
Position	Title	Department	Division	Name (position currently held by)	Add New Member
Primary	Analyst	Finance & Administration	Financial Reporting Office	Bertram Colpack	Edit Delete
#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 Delete
Edit Succession					

Figure: Editing Orders of Succession

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

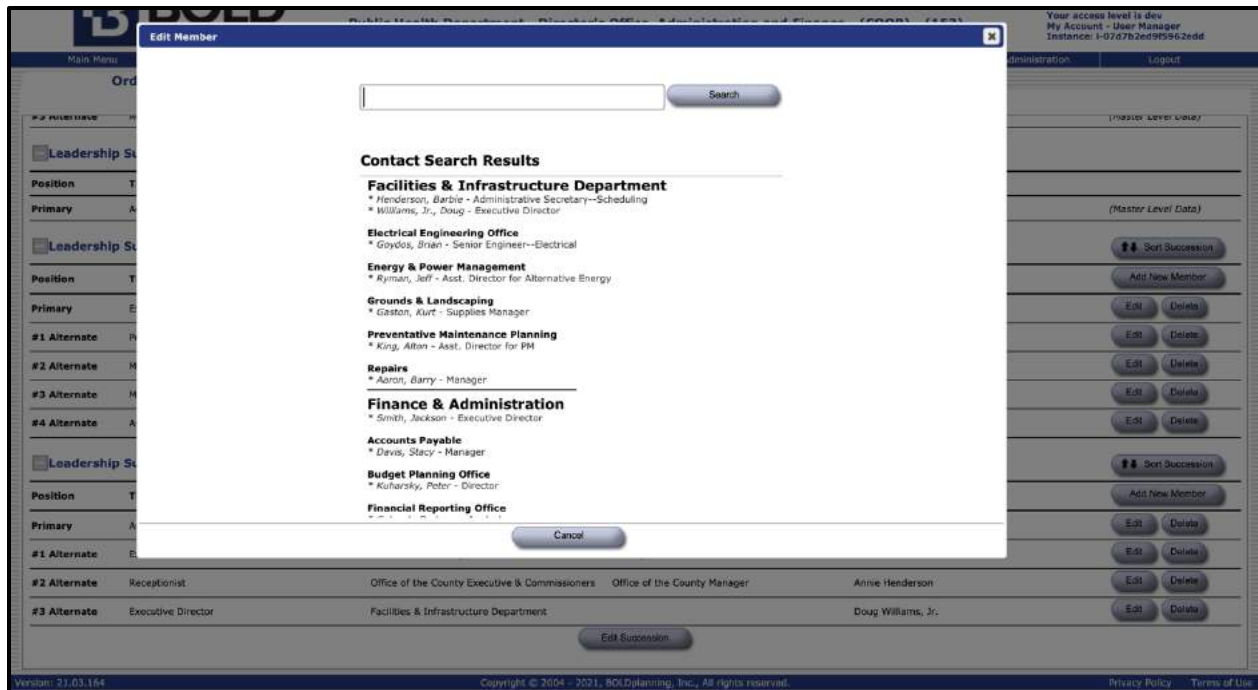


Figure: Assigning Contacts

- 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.
- 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.



Figure: Orders of Succession for Teams

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



Figure: Adding a New Succession

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

Position	Title	Department	Division	Name (position currently held by)	
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 Delete

Figure: Add New Member

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

Contact Search Results

Facilities & Infrastructure Department
 * Henderson, Barbie - Administrative Secretary--Scheduling
 * Williams, Jr., Doug - Executive Director

Electrical Engineering Office
 * Goydos, Brian - Senior Engineer--Electrical

Energy & Power Management
 * Ryman, Jeff - Asst. Director for Alternative Energy

Grounds & Landscaping
 * Gaston, Kurt - Supplies Manager

Preventative Maintenance Planning
 * King, Allan - Asst. Director for PM

Repairs
 * Aaron, Barry - Manager

Finance & Administration
 * Smith, Jackson - Executive Director

Accounts Payable
 * Davis, Stacy - Manager

Budget Planning Office
 * Kuharsky, Peter - Director

Financial Reporting Office

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.

Position	Title	Department	Division	Name (position currently held by)	
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 Delete

Position	Title	Department	Division	Name (position currently held by)	
Primary	Analyst	Finance & Administration	Financial Reporting Office	Bertram Colpack	Edit Delete
#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 Delete

Figure: Sorting Succession

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

Position	Title	Agency	Name (position currently held by)
Primary	Executive Director	Finance & Administration	Jackson Smith
#1 Alternate	Personnel Director	Human Resources	Tracy Jackson
#2 Alternate	Manager	Finance & Administration	Stacy Davis
#3 Alternate	Manager	Facilities & Infrastructure Department	Barry Aaron
#4 Alternate	Asst. Director for Alternative Energy	Facilities & Infrastructure Department	Jeff Ryman

Figure: Alternate Positions

- 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.)

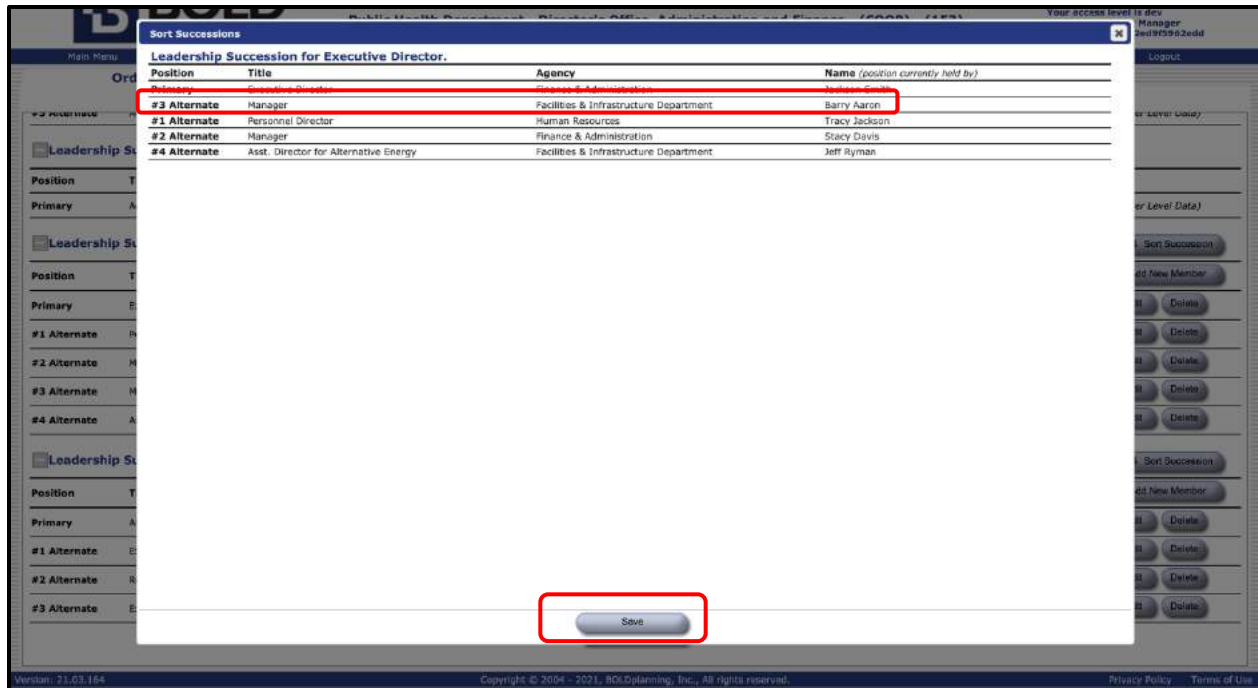


Figure: Alternate Positions

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

Leadership Succession for Executive Director.					Sort Succession
Position	Title	Department	Division	Name (position currently held by)	Add New Member
Primary	Executive Director	Finance & Administration		Jackson Smith	Edit Delete
#1 Alternate	Manager	Facilities & Infrastructure Department	Repairs	Barry Aaron	Edit Delete
#2 Alternate	Personnel Director	Human Resources	Personnel & Advancement	Tracy Jackson	Edit Delete
#3 Alternate	Manager	Finance & Administration	Accounts Payable	Stacy Davis	Edit Delete
#4 Alternate	Asst. Director for Alternative Energy	Facilities & Infrastructure Department	Energy & Power Management	Jeff Ryman	Edit Delete

Leadership Succession for Primary Continuity Planner.					Sort Succession
Position	Title	Department	Division	Name (position currently held by)	Add New Member
Primary	Analyst	Finance & Administration	Financial Reporting Office	Bertram Colpack	Edit Delete
#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 Delete

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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.

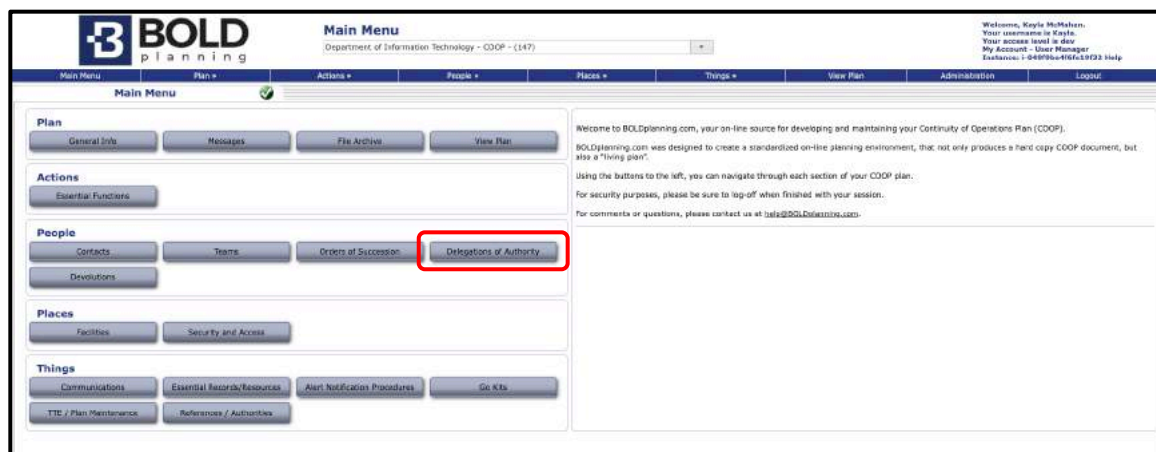


Figure: Main Menu – Delegations of Authority

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

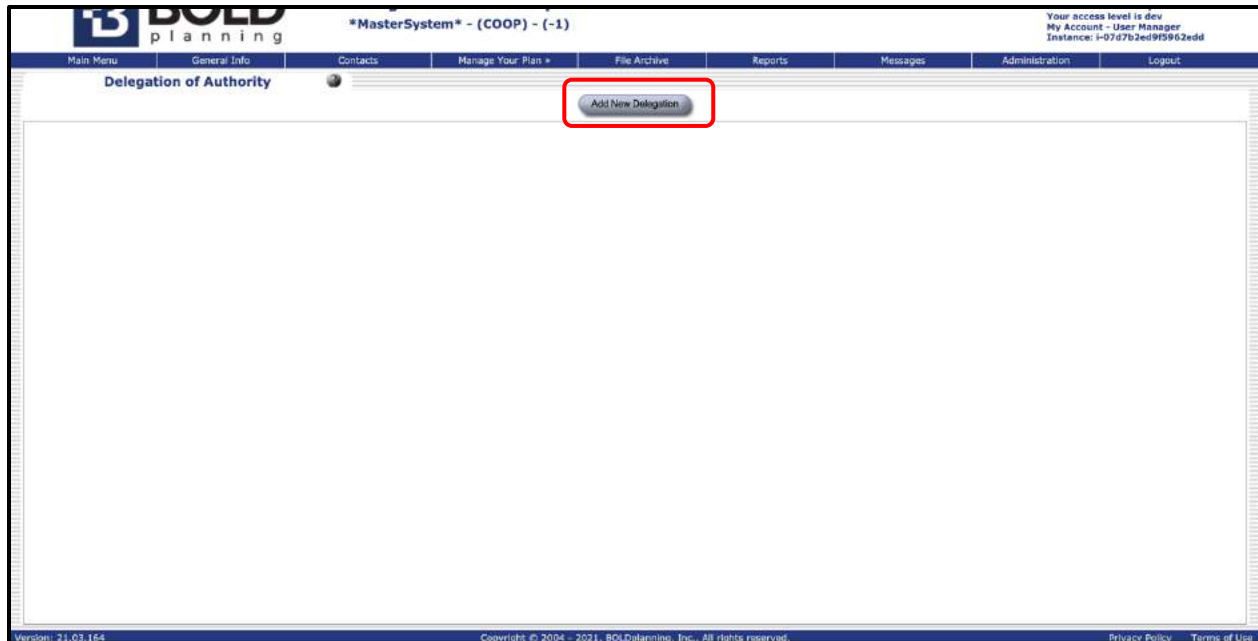


Figure: Add New Delegation

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

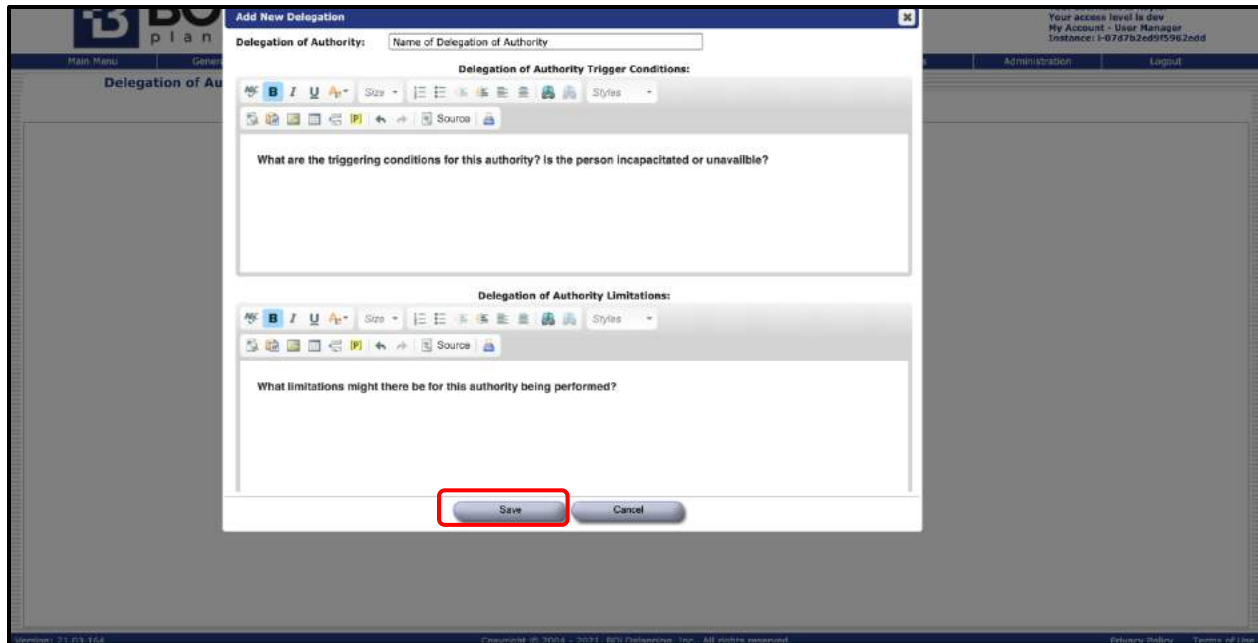


Figure: Adding New Delegation

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

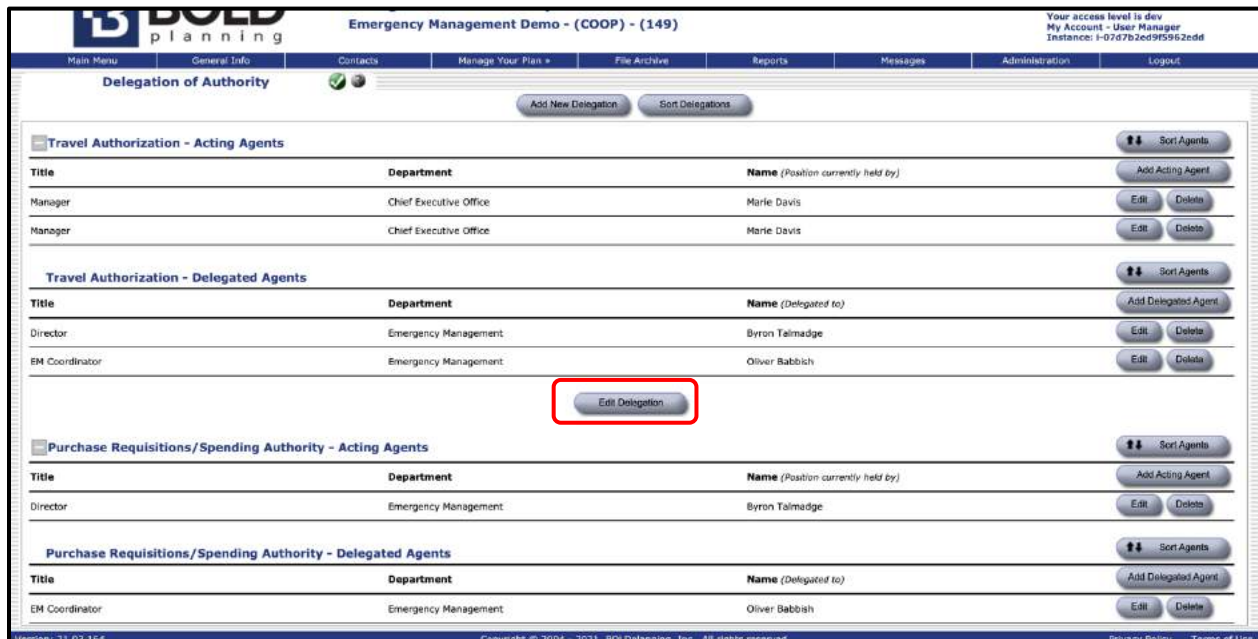


Figure: Editing Delegations

- 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)

The screenshot shows the 'Delegation of Authority' page in the BOLDplanning system. The page title is 'Emergency Management Demo - (COOP) - (149)'. The user's access level is 'dev' and they are logged in as 'My Account - User Manager' with instance '1-07d7b2ed9f5962edd'. The page has a navigation menu with options like 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The main content area is titled 'Delegation of Authority' and contains four sections:

- Travel Authorization - Acting Agents:** A table with columns 'Title', 'Department', and 'Name (Position currently held by)'. It lists two entries for 'Manager' in the 'Chief Executive Office' department, both named 'Marie Davis'. Each entry has 'Edit' and 'Delete' buttons.
- Travel Authorization - Delegated Agents:** A table with columns 'Title', 'Department', and 'Name (Delegated to)'. It lists two entries: 'Director' 'Byron Talmadge' and 'EM Coordinator' 'Oliver Babbish'. The 'Delete' button for 'Byron Talmadge' is highlighted with a red box.
- Purchase Requisitions/Spending Authority - Acting Agents:** A table with columns 'Title', 'Department', and 'Name (Position currently held by)'. It lists one entry for 'Director' 'Byron Talmadge' in the 'Emergency Management' department.
- Purchase Requisitions/Spending Authority - Delegated Agents:** A table with columns 'Title', 'Department', and 'Name (Delegated to)'. It lists one entry for 'EM Coordinator' 'Oliver Babbish' in the 'Emergency Management' department.

Figure: Delete Delegation

Editing Delegations of Authority

- Click on the “Delegations of Authority” button on the Main Menu.

The screenshot shows the 'Main Menu' page in the BOLDplanning system. The page title is 'Main Menu' and the user is logged in as 'Welcome, Kayla McMahon'. The page has a navigation menu with options like 'Main Menu', 'Plan', 'Actions', 'People', 'Places', 'Things', 'View Plan', 'Administration', and 'Logout'. The main content area is titled 'Main Menu' and contains several sections:

- Plan:** Buttons for 'General Info', 'Messages', 'File Archive', and 'View Plan'.
- Actions:** Button for 'Essential Functions'.
- People:** Buttons for 'Contacts', 'Teams', 'Orders of Succession', and 'Delegations of Authority' (highlighted with a red box).
- Places:** Buttons for 'Facilities' and 'Security and Access'.
- Things:** Buttons for 'Communications', 'Essential Records/Resources', 'Alert Notification Procedures', and 'Go Rts'.

Figure: Main Menu – Delegations of Authority

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

The screenshot shows the 'Delegation of Authority' screen in the BOLDplanning Emergency Management Demo. The interface includes a navigation menu at the top with options like 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The main content area is divided into sections for 'Travel Authorization - Acting Agents', 'Travel Authorization - Delegated Agents', and 'Purchase Requisitions/Spending Authority - Acting Agents' and 'Delegated Agents'. Each section contains a table with columns for 'Title', 'Department', and 'Name (Position currently held by)'. The 'Add Acting Agent' button is highlighted in red in the first row of the 'Travel Authorization - Acting Agents' table.

Figure: Add Acting Agent

- 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.

The screenshot shows the 'Add New Member' dialog box open over the 'Delegation of Authority' screen. The dialog box contains a search field and a 'Search' button. Below the search field, the 'Contact Search Results' are displayed, categorized by department: Chief Executive Office, City Secretary, Legal Staff, Mayors Office, Communications, Public Information, Social Media, Emergency Management, and Information Technology. The 'Emergency Management' category is highlighted, showing 'Babbish, Oliver - EM Coordinator' and 'Talmadge, Byron - Director'. A 'Cancel' button is at the bottom of the dialog box.

Figure: Add Acting Agent from Contacts

- 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."

Emergency Management Demo - (COOP) - (149)

Your access level is dev
My Account - User Manager
Instance: 1-0767b2ed9f5962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Delegation of Authority

Add New Delegation | Sort Delegations

Travel Authorization - Acting Agents | Sort Agents

Title	Department	Name (Position currently held by)	
Manager	Chief Executive Office	Marie Davis	Add Acting Agent
Manager	Chief Executive Office	Marie Davis	Edit Delete

Travel Authorization - Delegated Agents | Sort Agents

Title	Department	Name (Delegated to)	
Director	Emergency Management	Byron Talmadge	Add Delegated Agent
EM Coordinator	Emergency Management	Oliver Babbish	Edit Delete

Edit Delegation

Purchase Requisitions/Spending Authority - Acting Agents | Sort Agents

Title	Department	Name (Position currently held by)	
Director	Emergency Management	Byron Talmadge	Add Acting Agent
			Edit Delete

Purchase Requisitions/Spending Authority - Delegated Agents | Sort Agents

Title	Department	Name (Delegated to)	
EM Coordinator	Emergency Management	Oliver Babbish	Add Delegated Agent
			Edit Delete

Figure: Adding Acting Agent

- 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.

Emergency Management Demo - (COOP) - (149)

Your access level is dev
My Account - User Manager
Instance: 1-0767b2ed9f5962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Delegation of Authority

Add New Delegation | Sort Delegations

Travel Authorization - Acting Agents | Sort Agents

Title	Department	Name (Position currently held by)	
Manager	Chief Executive Office	Marie Davis	Add Acting Agent
Manager	Chief Executive Office	Marie Davis	Edit Delete

Travel Authorization - Delegated Agents | Sort Agents

Title	Department	Name (Delegated to)	
Director	Emergency Management	Byron Talmadge	Add Delegated Agent
EM Coordinator	Emergency Management	Oliver Babbish	Edit Delete

Edit Delegation

Purchase Requisitions/Spending Authority - Acting Agents | Sort Agents

Title	Department	Name (Position currently held by)	
Director	Emergency Management	Byron Talmadge	Add Acting Agent
			Edit Delete

Purchase Requisitions/Spending Authority - Delegated Agents | Sort Agents

Title	Department	Name (Delegated to)	
EM Coordinator	Emergency Management	Oliver Babbish	Add Delegated Agent
			Edit Delete

Figure: Add Delegated Agent

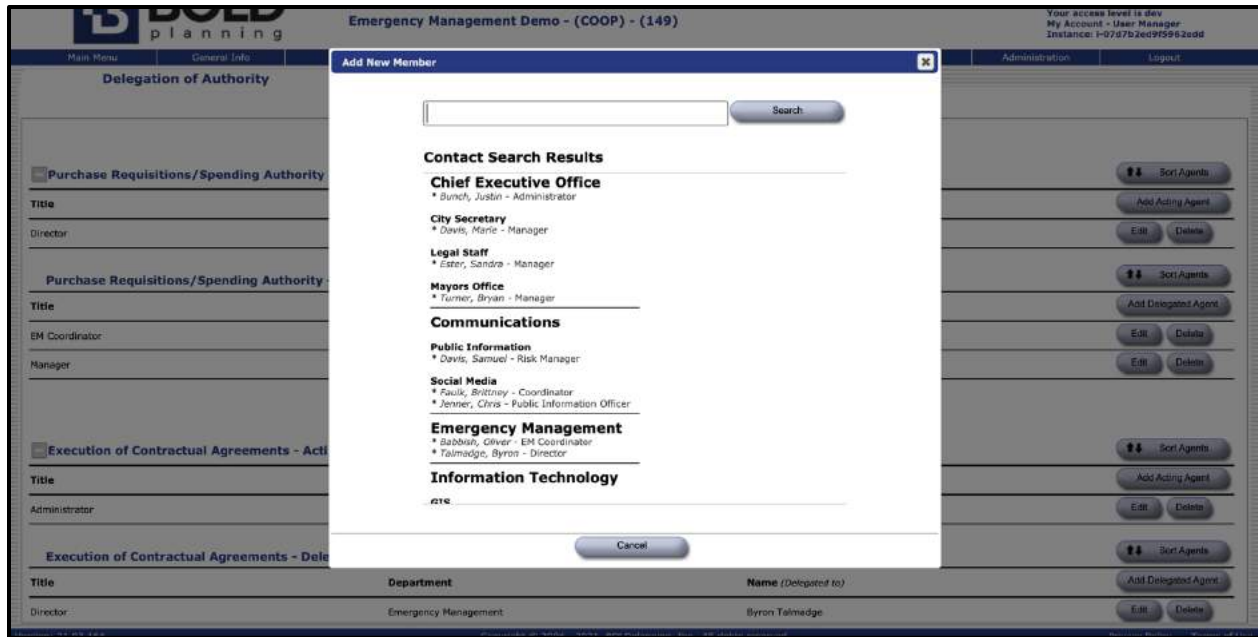


Figure: Add Delegated Agent

- 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."
- Once again, click on the "Add Delegated Agent" button to the right of the delegation row. Select the appropriate *second* Delegated Agent name from the contact search results. This is the person who will handle this specific function if the #1 Delegated Agent is unavailable.



Figure: Sort Agents

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.



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.

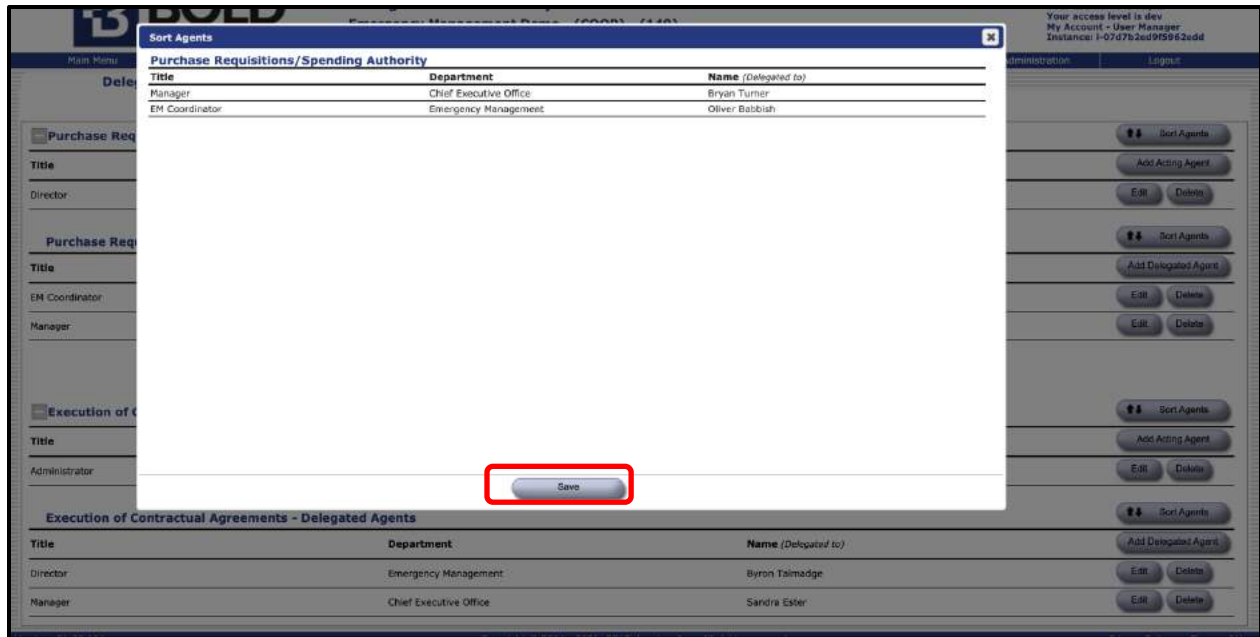


Figure: Dragging Agents to Sort for Delegation of Authority

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

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:

Acting Agents:

Sandra Ester/Manager
Bryan Turner/Manager

Delegated Agents:

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:

Acting Agents:

Addison Brown/Audit

Delegated Agents:

Jordan Jefferson/Lead Administrator
Justin Bunch/Administrator

Kim Branch/Administrator

Travel Authorization

Acting Agents:

Marie Davis/Manager

Delegated Agents:

Byron Talmadge/Director

Oliver Babbish/EM Coordinator

Purchase Requisitions/Spending Authority

Acting Agents:

Byron Talmadge/Director

Delegated Agents:

Oliver Babbish/EM Coordinator

Bryan Turner/Manager

Execution of Contractual Agreements

Acting Agents:

Justin Bunch/Administrator

Delegated Agents:

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.



Figure: Main Menu – Alert Notification Procedures

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

BOLDplanning Public Health Department - Director's Office, Administration and Finance - (COOP) - (153) Your access level is dev
My Account - User Manager
Instance: I-07d7b2ed9f95962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Alert Notification Procedures

The Department Head will notify the Continuity Team Chief to activate the continuity plan. Edit

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. Edit

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Figure: Review Pre-Loaded Information for Alert Notification Procedures

BOLDplanning Public Health Department - Director's Office, Administration and Finance - (COOP) - (153) Your access level is dev
My Account - User Manager
Instance: I-07d7b2ed9f95962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Alert Notification Procedures

The Department Head will notify the Continuity Team Chief to activate the continuity plan. Edit

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. Edit

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Figure: Edit Alert Notification Procedures

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

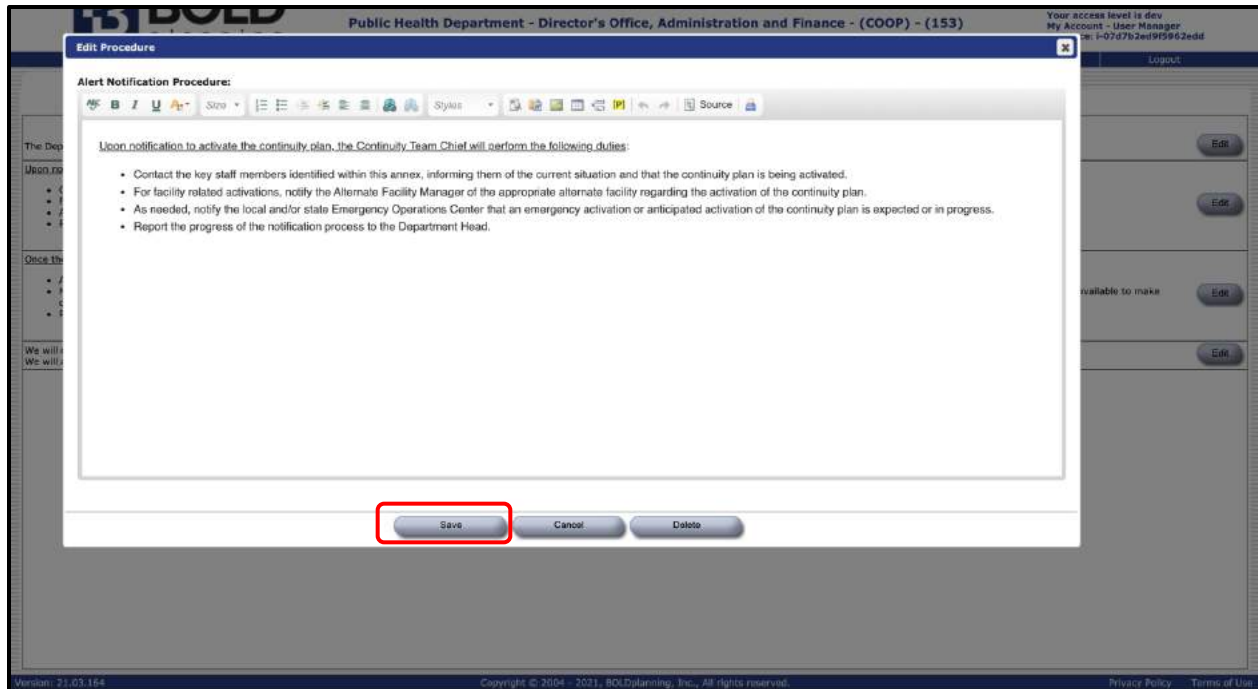


Figure: Adding Procedures to Alert Notification Procedures

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.

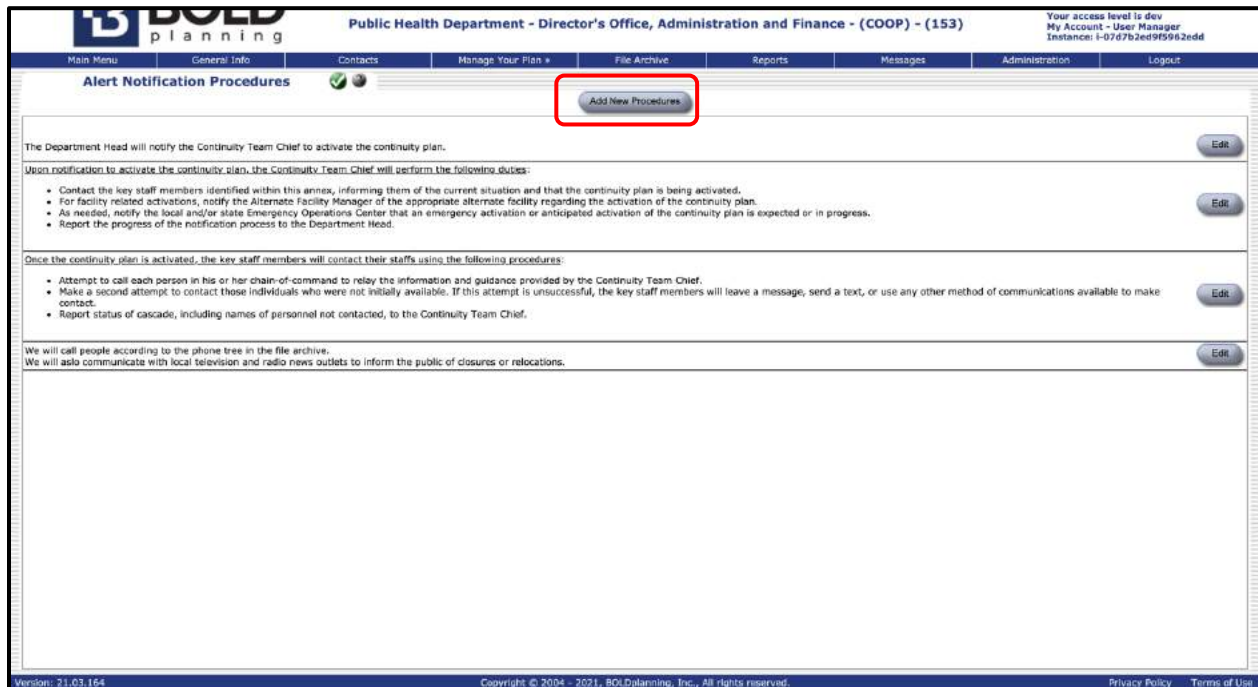


Figure: Add New Procedures

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 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.

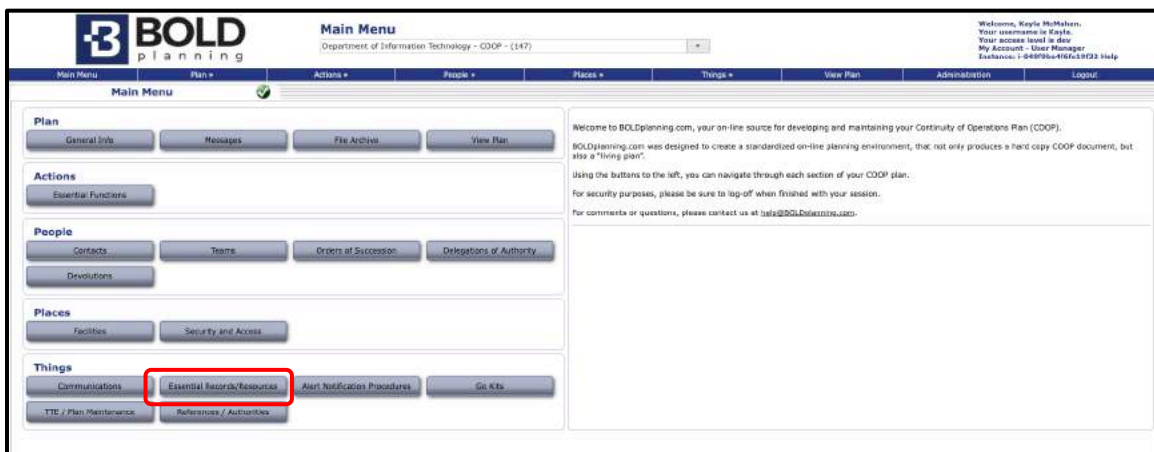
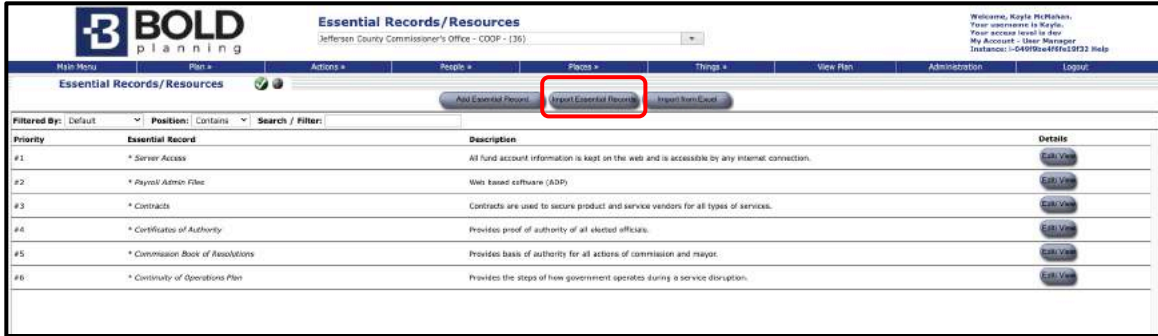


Figure: Main Menu – Essential Resources

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



3.

Figure: Importing Essential Resources

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



5.

Figure: Importing Essential Resources

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

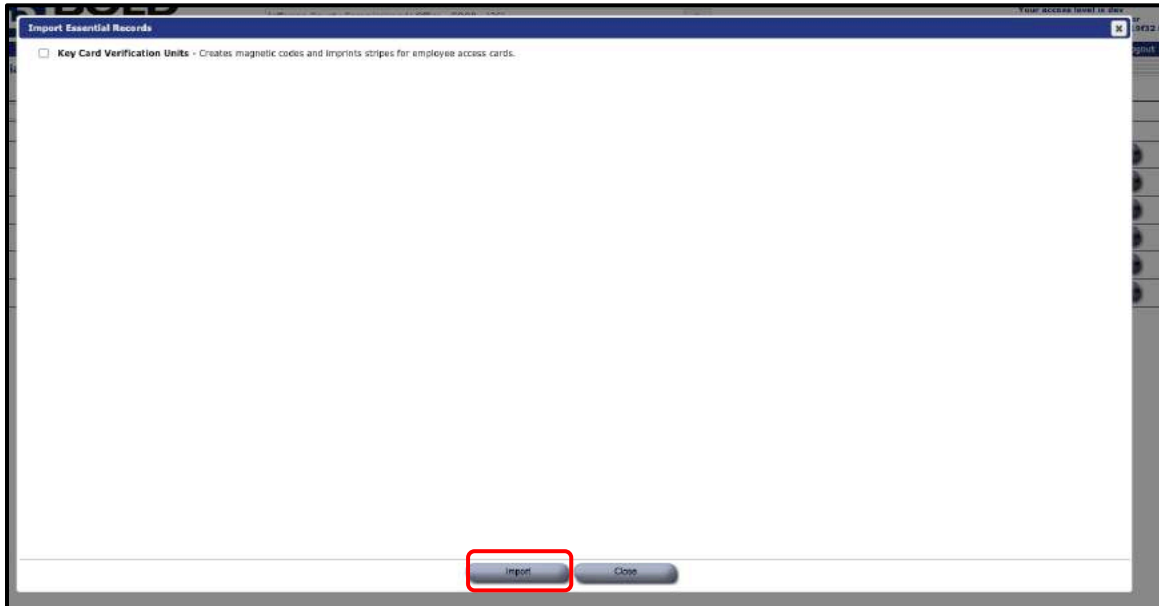


Figure: Importing Essential Resources

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.

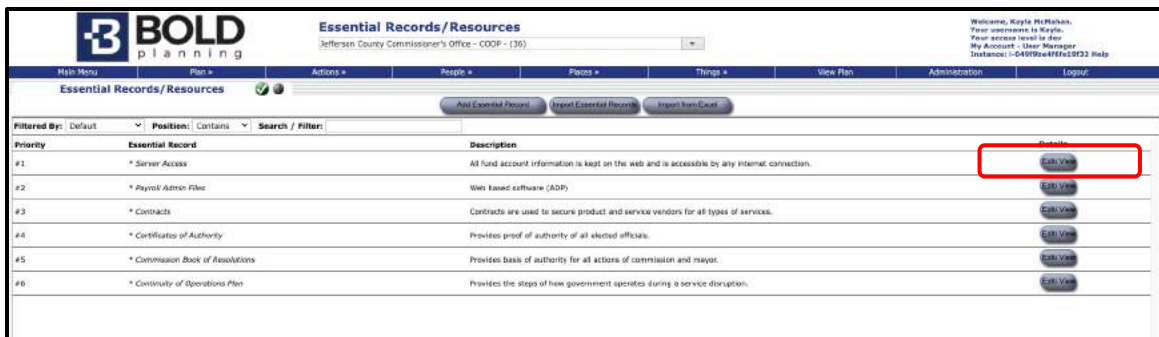


Figure: To Edit/View Essential Resources

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.



Figure: Adding Essential Resources Without Import

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

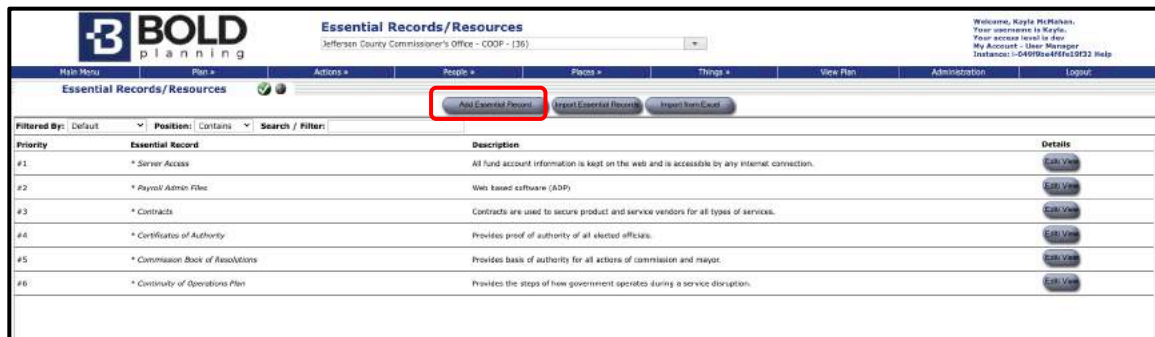


Figure: Add New Essential Resources

- Type in the name of the essential resource.

The screenshot shows the 'Essential Records/Resources' form in the BOLDplanning system. The 'Name of Essential Record:' field is highlighted with a red box. The form includes sections for 'Describe this Essential Record, explain what it is and how it is used within your organization.', 'Describe the process of how this Essential Record is protected, maintained, and by whom.', and 'Describe where this Essential Record is kept and provide details of what format it is kept in.' The form also includes fields for 'Primary Location', 'Backup Location', 'Remote Accessible', and 'Review/Update Date'.

-

Figure: Name of the Essential Resource

- 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.

The screenshot shows the 'Essential Records/Resources' form in the BOLDplanning system. The first free-form data entry box is highlighted with a red box. The form includes sections for 'Describe this Essential Record, explain what it is and how it is used within your organization.', 'Describe the process of how this Essential Record is protected, maintained, and by whom.', and 'Describe where this Essential Record is kept and provide details of what format it is kept in.' The form also includes fields for 'Primary Location', 'Backup Location', 'Remote Accessible', and 'Review/Update Date'.

Figure: Describing Essential Resource

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

Figure: Describing Protection/Maintenance of Essential Resource

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

Figure: Essential Resource Location and Format

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

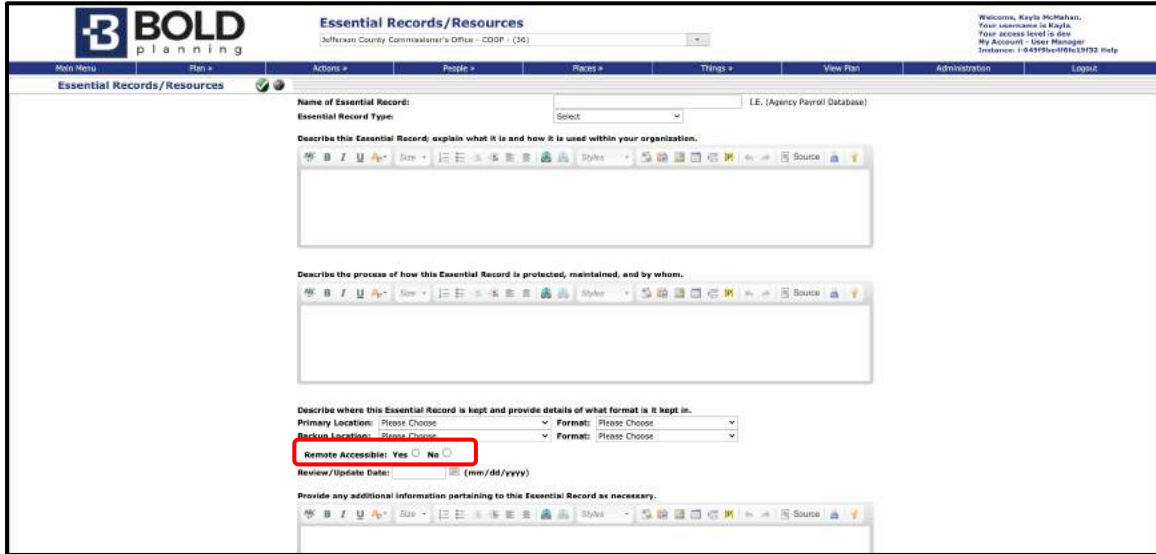


Figure: Remote Accessible

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

<p>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.</p>	<p>reviewed and amended frequently.</p>	<p>106 W. Higgins Bldg. 76 Springfield, XX 55551 Format: Hard Copy - Paper</p> <p>Remote Accessible: Yes</p>	
<p>Vital Record Name: Personnel Files</p> <p>System/Filename:</p>		<p>Primary Location: 522 West 55th Street Format: Hard Copy</p> <p>Backup Location: City of Springfield Public Safety 106 W. Higgins Bldg. 76 Springfield, XX 55551 Format:</p> <p>Remote Accessible: No</p>	<p>Review / Update Date:</p>

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

Administrator Drive-Away Kit	Quantities
Communication:	
1. Television <i>HD</i>	5
2. Radio <i>HiFi</i>	6
3. Test items	6
Forms:	
1. List of headquarters personnel phone numbers	
2. Contact numbers for legal staff	
Other:	
1. Pots	6
Supplies:	
1. Copy of plan	1
2. Copy of emergency operations plan	1
3. Office supplies <i>Pens, pencils, stapler, etc.</i>	20

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

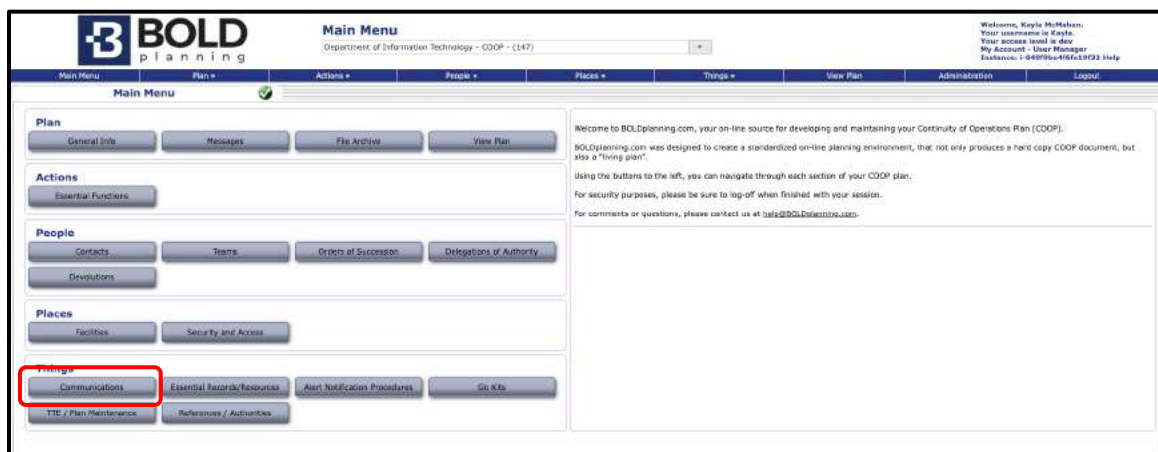


Figure: Main Menu – Communication

2. Click the box "Add New Communication."



Figure: Add new Communication

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

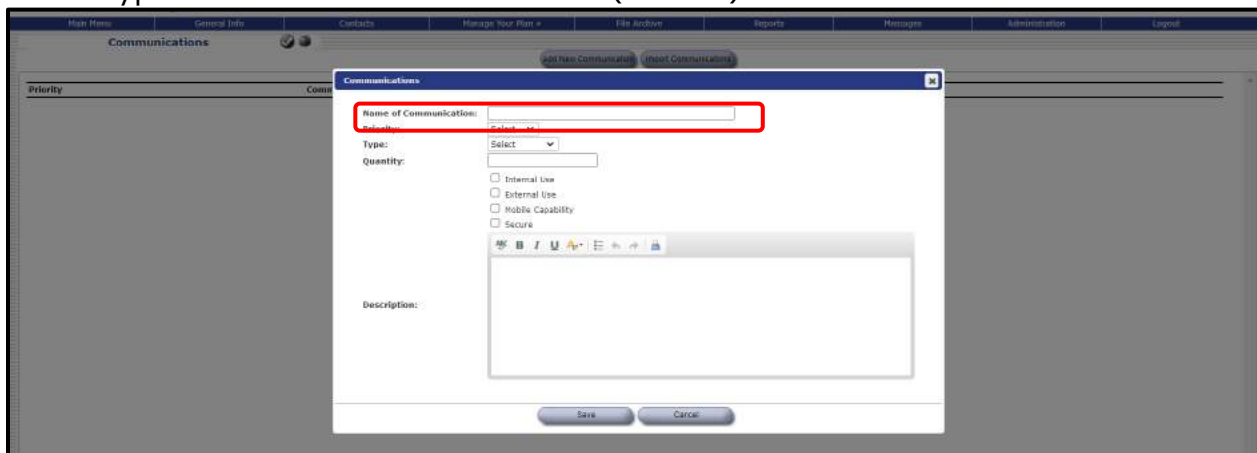


Figure: Name of Communication

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

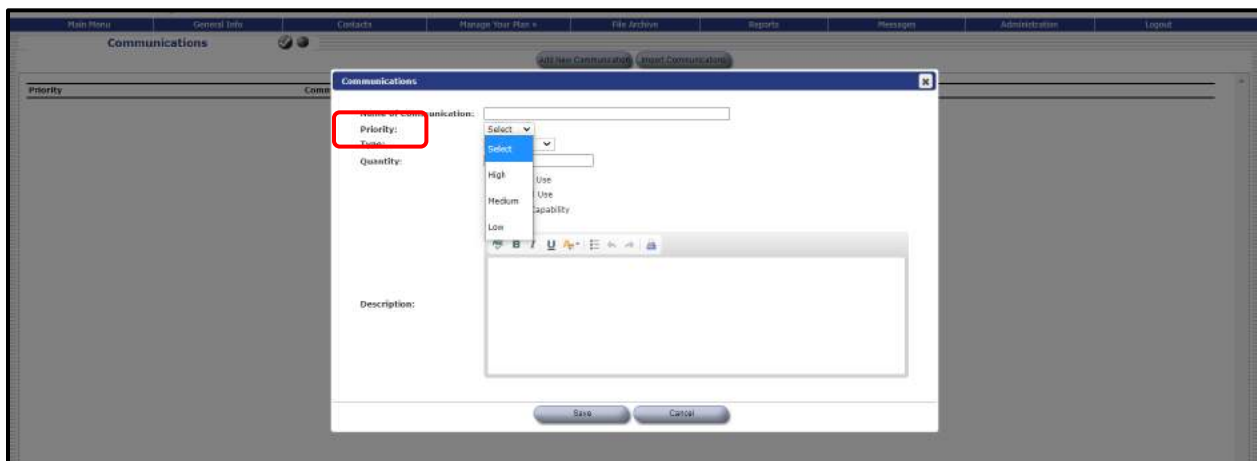


Figure: Communication Priority

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

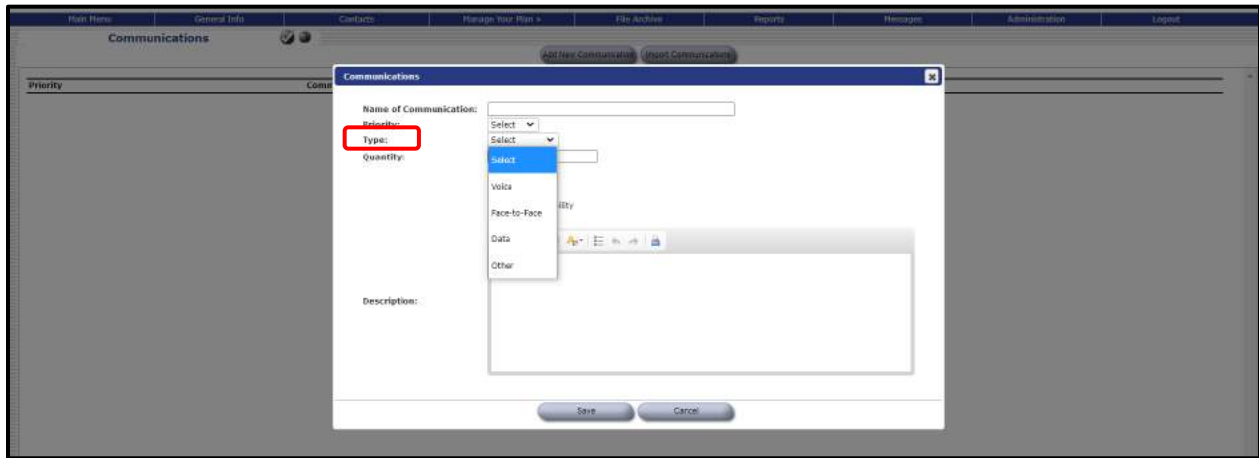


Figure: Type of Communication

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

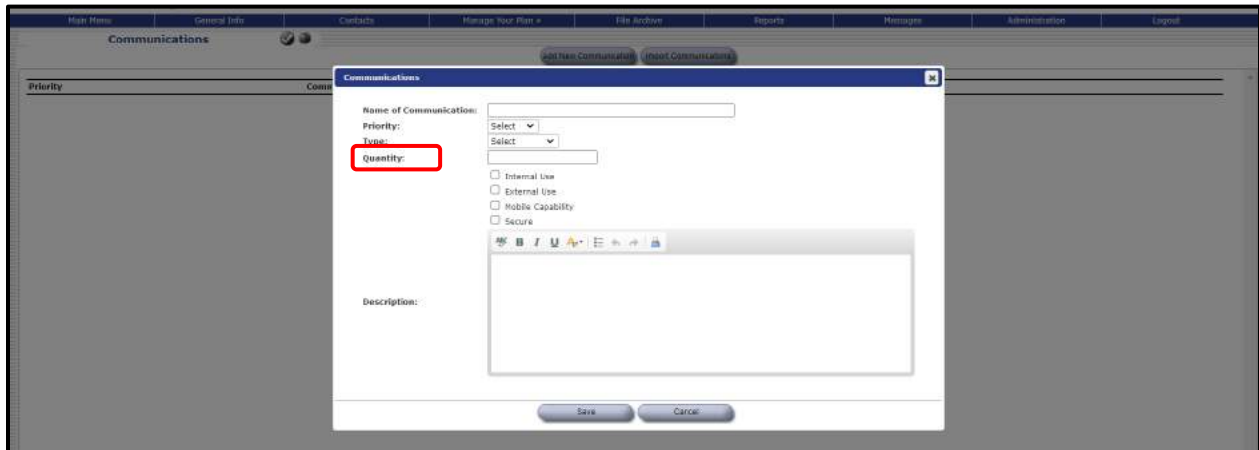


Figure: Communication Quantity

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.

Figure: Communication Safety

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

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."

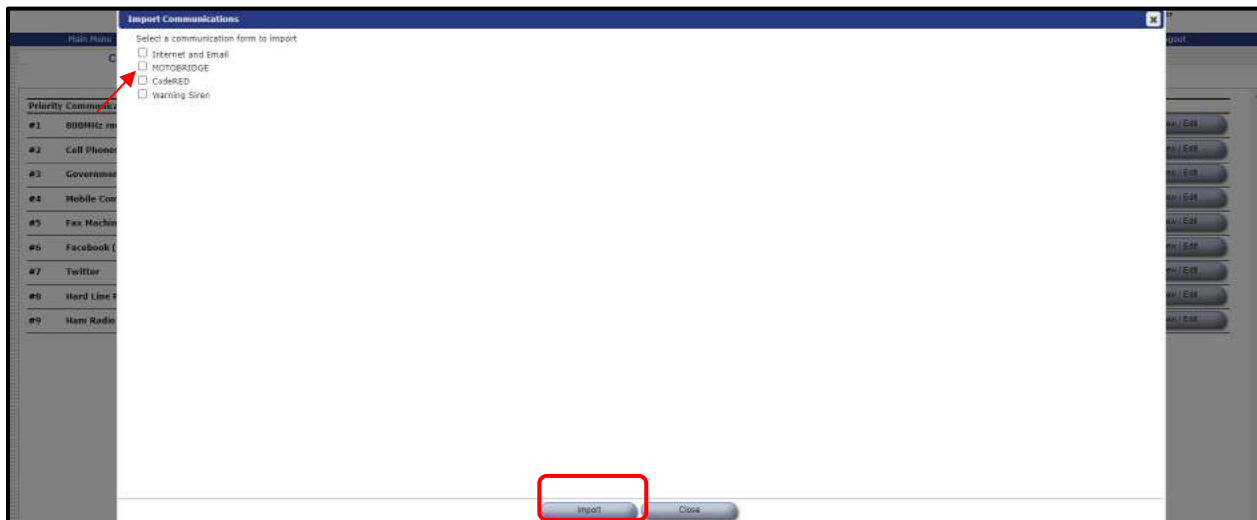


Figure: Importing Communications Selections

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.

Priority	Communication	Priority	
#1	800MHz radios	High	View / Edit
#2	Cell Phones	High	View / Edit
#3	Government Emergency Telecommunications Service (GETS)	High	View / Edit
#4	Mobile Communications Center	High	View / Edit

				di t
#5	Fax Machine		Medium	Vi e w / E di t
#6	Facebook (Emergency Management)		Medium	Vi e w / E di t
#7	Twitter		Medium	Vi e w / E di t
#8	Hard Line Phones		Low	Vi e w / E di t
#9	Ham Radio		Low	Vi e w / E di t
#10	Warning Siren		High	Vi e w / 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.

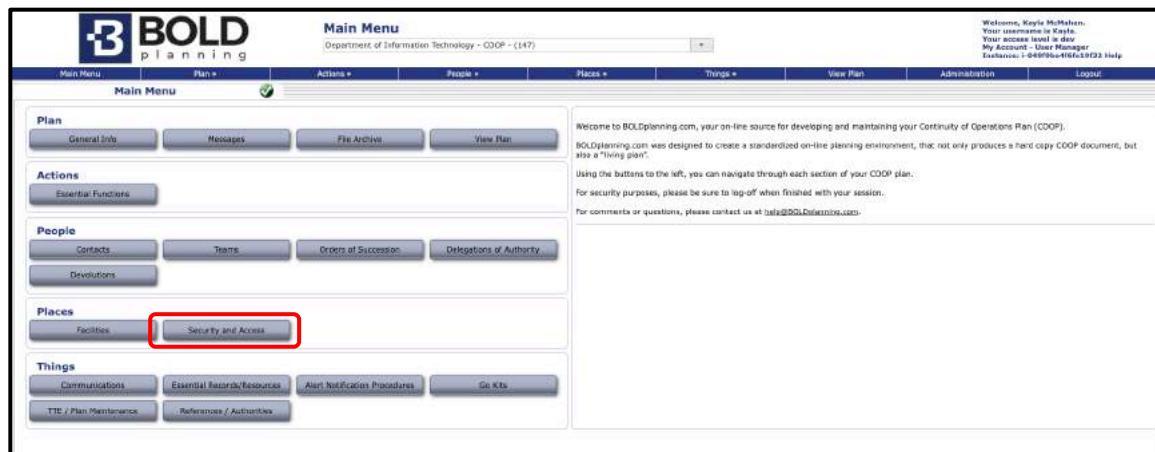


Figure: Main Menu – Security and Access

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

The screenshot displays the BOLDplanning COOP interface for the Public Health Department - Emergency Preparedness and Response - (COOP) - (154). The user is logged in as 'dev' with the account 'My Account - User Manager' (Instance: 1-9747b2ed99962edd). The interface is divided into several sections:

- Facility:** Lists three facilities under the heading 'Alternate Facility / Primary Facility':
 - Data Center:** 1456 East End Road, Springfield, TN 34589, USA.
 - Public Health Department Headquarters:** 2500 Charlotte Avenue, Nashville, TN 37209, USA.
 - Southside WIC Nutrition Center:** 3718 Nolensville Pike, Nashville, TN 37211, USA.
- Security and Access Controls Information:** Contains three sub-sections:
 - Access Controls / Physical:** Access is controlled by standard departmental RF ID Keycard / ID Badge.
 - Communications and Information Systems / Cyber:** Computer systems are accessed using departmental user ID and password.
 - Evacuation Procedures:** Evacuation procedures are located near all exits. A copy is also loaded in the file archive section of this plan.

Each facility entry has an 'Edit' button to its right. The 'Edit' button for the Data Center facility is highlighted with a red box. The footer of the interface includes 'Version: 21.03.164', 'Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.', 'Privacy Policy', and 'Terms of Use'.

Figure: Editing Facilities Under Security, Access & Evacuation

The screenshot shows the BOLDplanning COOP web application interface. The header includes the BOLDplanning logo, the title 'Public Health Department - Emergency Preparedness and Response - (COOP) - (154)', and user information: 'Your access level is dev', 'My Account - User Manager', and 'Instance: 1-076792ed9f9992edd'. The navigation menu includes 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The main content area is titled 'Security, Access & Evacuation' and contains three sections:

- Access Controls / Physical Access:** A text box containing the text: 'Access is controlled by standard departmental RF ID Keycard / ID Badge.'
- Communications and Information Systems Security / Cyber Security:** A text box containing the text: 'Computer systems are accessed using departmental user ID and password.'
- Evacuation Procedures:** A text box containing the text: 'Evacuation procedures are located near all exits. A copy is also loaded in the file archive section of this plan.'

The footer of the application shows 'Version: 21.03.164', 'Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.', and links for 'Privacy Policy' and 'Terms of Use'.

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 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
 - 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
 - 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.

Figure: TTE/Plan Maintenance details page

Maintaining a Log of All Events

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

Date	Event Title	Event Type	Status	Create Date	Send Reminder?	
6/12/2019	Continuity of Operations TableTop Exercise	Table Top Exercise	Completed	10/23/2019	Yes	Edit
5/15/2019	Planning Team Meeting	Other	Completed	10/23/2019	Yes	Edit
4/17/2019	Planning Team Meeting	Other	Completed	10/23/2019	Yes	Edit
3/28/2019	Plan Maintenance / Updates	Plan Maintenance	Completed	03/28/2019	No	Edit
3/13/2019	Planning Team Meeting	Other	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 [xxx. Springfield.com](http://xxx.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.)
3. Select the boxes to the left of any names listed that are contacts for your organization. Be sure to look through the entire list. Some people may be listed near the bottom of the list in a sub-group.
4. Click on the “Import Contacts” button.
5. Check to see that the desired contacts are now in your list. Check to see if the names are organized into the appropriate sub-group or department. If they are incorrectly listed, or if there are any other errors, edit the contact’s name. (See sections 9.3 and 9.4.)

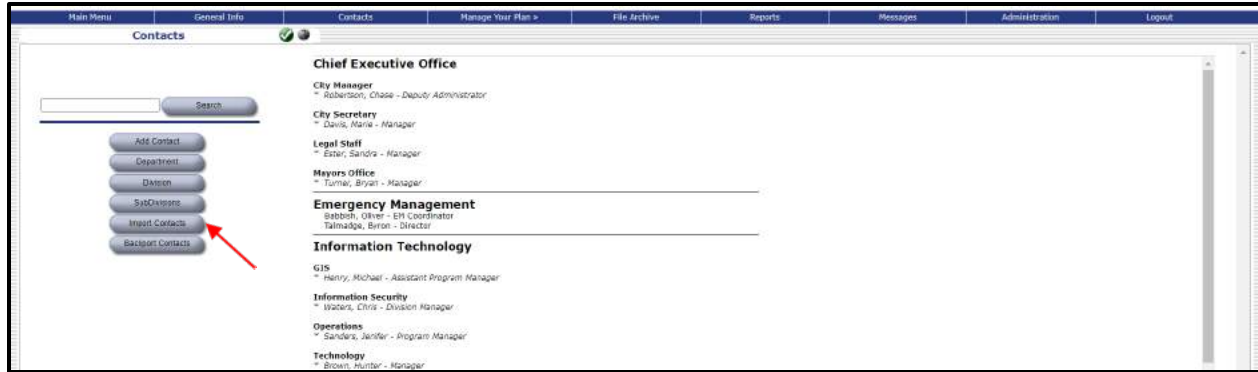


Figure: Importing Contacts

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.
7. Add the employee’s contact information. The standard points of contact for each person in your plan are Work number, cell number (work and personal), work email, and personal email.

The screenshot shows a web-based form for adding or editing a contact. The form is titled "Address, Phone, Email" and "Contact Details". It contains several sections of input fields:

- Member Information:** Member Type* (dropdown), First Name, Middle Name, Last Name.
- Organizational Information:** Department, Division, SubDivision, Title.
- Location Information:** Location Quick Pick (dropdown), Address, City, State (dropdown), ZIP Code.
- Contact Information:** Home Number, Work Number, Cell Number, Fax Number, Additional Number, Work Email, Personal Email.
- Comments:** A text area for entering notes.
- Buttons:** Save and Cancel buttons at the bottom.

Figure: Contact Details form

Editing or Deleting a Contact

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

5. Check to see that the contact is listed appropriately in the Contacts database.

Reassigning a Contact

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

To reassign, select a contact.

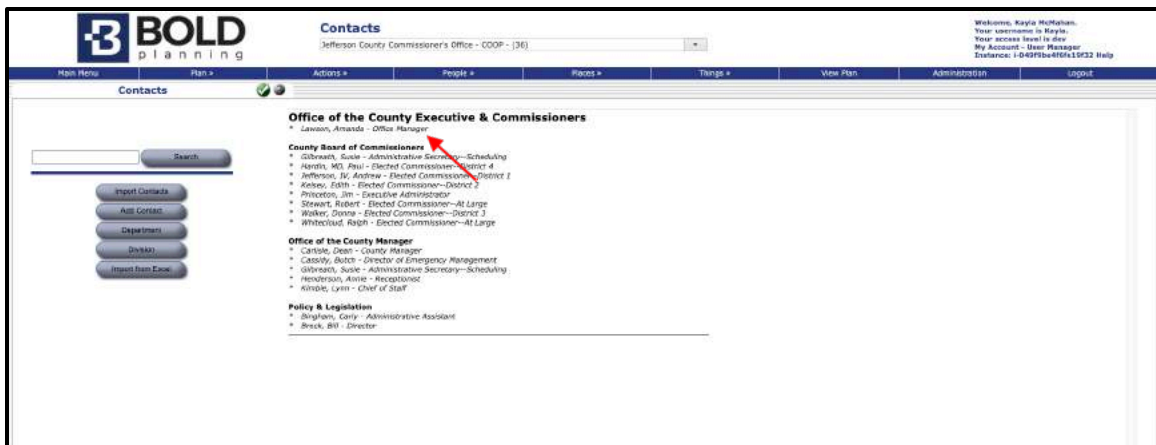
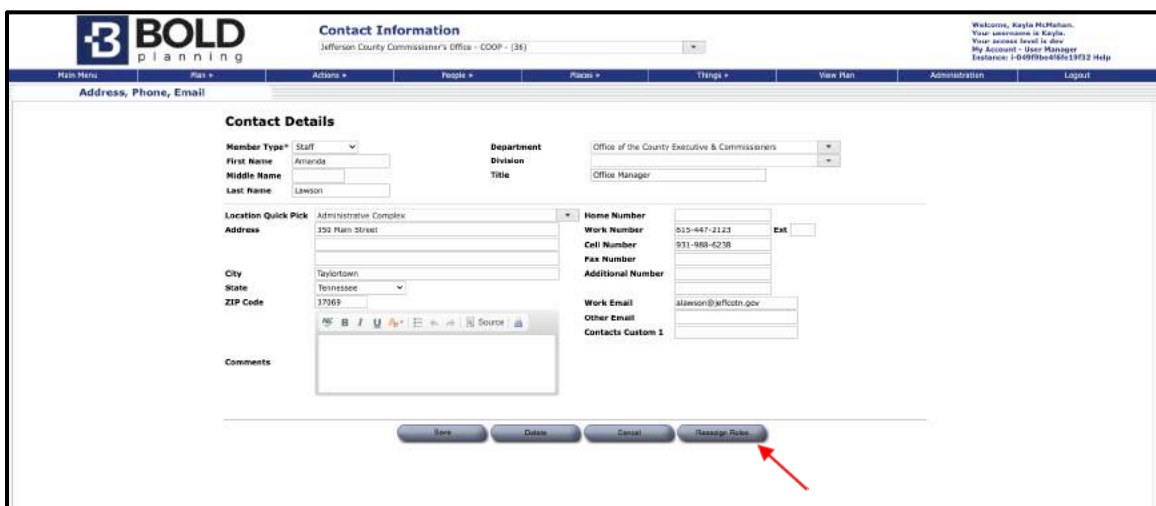


Figure: Selecting a Contact

Click on 'Reassign Roles.'



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.'

The screenshot displays the BOLDplanning web interface. At the top, the logo and navigation menu are visible. The main content area shows the 'Contact Information' page for Amanda Lawson, Office Manager. A modal dialog box titled 'Reassign Contact Roles' is open, allowing the user to select roles to reassign and choose the person to receive them. The dialog box includes a 'Roles' section with checkboxes for 'General Info', 'Orders of Succession', 'Delegations of Authority', 'Essential Functions', 'Facilities', and 'Planning Partners'. It also has a 'Person Receiving New Assignments' dropdown menu. The background page shows the contact details for Amanda Lawson, including her name, title, and department.

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.

The screenshot shows a web application interface for managing contacts. The main window is titled "Address, Phone, Email" and contains a "Contact Details" form. A red arrow points to the "Member Type*" dropdown menu, which is currently set to "Vendor/Other". The form includes the following fields:

- Member Type* (Dropdown menu)
- Vendor/Company* (Dropdown menu)
- First Name (Text input)
- Last Name (Text input)
- Planning Partner (Checkbox)
- Location Quick Pick (Dropdown menu)
- Address (Text input)
- City (Text input)
- State (Dropdown menu)
- ZIP Code (Text input)
- Comments (Text area)
- Home Number (Text input)
- Work Number (Text input)
- Cell Number (Text input)
- Fax Number (Text input)
- Additional Number (Text input)
- Work Email (Text input)
- Personal Email (Text input)
- Website (Text input)

At the bottom of the form, there are "Save" and "Cancel" buttons.

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 NUMBERS	EMAIL ADDRESS
Richard Abblet	Deputy Commissioner - Finance/Budget/Voucher	Relocation Team		
Jane Crowley	Administrative Services Officer II/Human Resources	Support Team		
Bridget Gardner	Continuity Planning Project Manager		Work: 555-663-1234	Gardner@cityofspringfield.org
Arnold Milton	Managing Deputy Commissioner HR/IT Telecom/IT/Telecom		Work: 555-123-2897 Home: 555-567-8976 Cell: 555-678-0987	

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

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

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

VENDOR/OTHER	TITLE/AREA OF RESPONSIBILITY	TEAM ROLES	PHONE NUMBERS	EMAIL ADDRESS
Harold White	Springfield Systems, Inc.		Cell: 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.

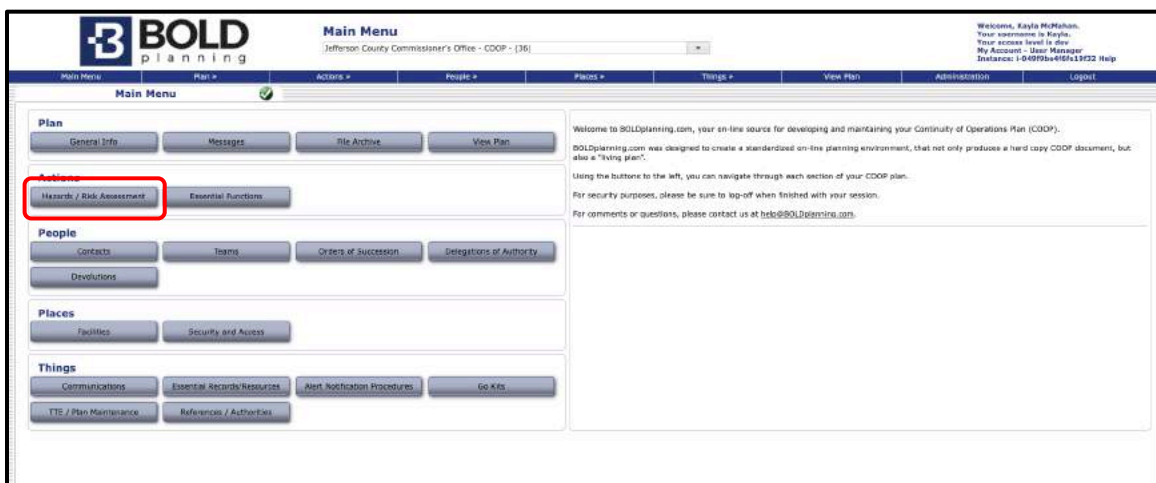


Figure: Main Menu – Hazards/Risk Assessment

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

Emergency Management Demo - (COOP) - (149)

Your access level is dev
My Account - User Manager
Instance: 1-07d7b2ed9f5962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Hazards / Risk Assessment

Add Hazard / Risk | **Import Hazards / Risks**

Priority	Risk	Risk Rating	View / Edit	Action List
#1	Man-Made Physical Disruption	1.75 - Low	View / Edit	Action List
#2	Earthquake	1.55 - Low	View / Edit	Action List
#3	Dam or Levee Failure	1.9 - Low	View / Edit	Action List
#4	Hazardous Materials Incident (HAZMAT)	2.3 - Moderate	View / Edit	Action List
#5	Volcanic Eruption	2.3 - Moderate	View / Edit	Action List
#6	Pandemic Event	2.9 - Moderate	View / Edit	Action List
#7	Tornado	3.05 - Moderate	View / Edit	Action List
#7	Riverine Flood	3.05 - Moderate	View / Edit	Action List
#8	Extreme Weather - Winter Storm	3.55 - High	View / Edit	Action List
#9	Extreme Weather - High Temperature	2.5 - Moderate	View / Edit	Action List
#9	Power Outage	3.5 - High	View / Edit	Action List
#11	Severe Thunderstorms	2.35 - Moderate	View / Edit	Action List

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Figure: Import Hazards/Risks

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

Emergency Management Demo - (COOP) - (149)

Your access level is dev
My Account - User Manager
Instance: 1-07d7b2ed9f5962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Hazards / Risk Assessment

View all Hazards / Risks

Risk	Risk Rating	Import Selected Risks	Select All Risks
Fire	3.4 - High	<input type="checkbox"/>	<input type="checkbox"/>
Man-Made Technological Disruption	3.9 - High	<input type="checkbox"/>	<input type="checkbox"/>
Hurricane	2.55 - Moderate	<input type="checkbox"/>	<input type="checkbox"/>
Wildfire	2.7 - Moderate	<input type="checkbox"/>	<input type="checkbox"/>
Flash Flooding	2.65 - Moderate	<input type="checkbox"/>	<input type="checkbox"/>

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Figure: Select boxes; Import Selected Risks

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

The screenshot shows the 'Hazards / Risk Assessment' page with a table of hazards. The first row is highlighted, and the 'View / Edit' button for that row is circled in red.

Priority	Risk	Risk Rating	View / Edit	Action List
#1	Man-Made Physical Disruption	1.75 - Low	View / Edit	Action List
#2	Earthquake	1.55 - Low	View / Edit	Action List
#3	Dam or Levee Failure	1.9 - Low	View / Edit	Action List
#4	Hazardous Materials Incident (HAZMAT)	3.3 - Moderate	View / Edit	Action List
#5	Volcanic Eruption	3.3 - Moderate	View / Edit	Action List
#6	Pandemic Event	3.9 - Moderate	View / Edit	Action List
#7	Tornado	3.05 - Moderate	View / Edit	Action List
#7	Riverine Flood	3.55 - Moderate	View / Edit	Action List
#8	Extreme Weather - Winter Storm	3.55 - High	View / Edit	Action List
#9	Extreme Weather - High Temperature	3.5 - Moderate	View / Edit	Action List
#9	Power Outage	3.5 - High	View / Edit	Action List
#11	Severe Thunderstorms	3.35 - Moderate	View / Edit	Action List

Figure: View/Edit a Hazard

The screenshot shows the 'Edit the Information About a Hazard' form. The 'Save' button is circled in red.

Risk Name: Man-Made Physical Disruption **Risk Type:** Man-Made Risk

Risk Description: Man-Made physical disruptions encompasses any intentional, inadvertent, or accidental physical actions taken by an individual or group which results in a disruption in services, damage to property, threat to injury, or actualized injury or harm. This includes acts of sabotage, bombing or bomb threats, threats of bodily harm, physical or firearm related violence, vandalism, terrorism, theft, or kidnapping. These actions can range from a direct action, a suspicious looking package or letter, to telephoned or emailed threats. It does not matter if person or group intends on following through with the threat: the fear of a threat is cause enough to create an operational disruption. None of these events have to take place at a worksite to create a disruption.

These disruptions can cause secondary hazards, and long term economic costs from lost revenue, closures and failure to thrive for regional industries can be

Potential Impact of Event including financial costs: The most common form man-made disruptions takes are generalized physical threats. A threat can generate fear among both the recipient and co-workers, regardless of whether they were the target or not. The range of impact from a threat can range to the lost productivity and emotional well-being of an individual to an evacuation and loss of productivity and sense of well-being to an entire region wide organization. Comparatively, random acts of vandalism can create a sense of

Probability:* 1 - Unlikely
Magnitude / Severity:* 2 - Limited
 * Required

Warning Time:* 4 - Less Than 6 Hours
Duration:* 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.



Figure: Main Menu – Hazards/Risk Assessment

2. Click on the “Add Hazard/Risk” button.

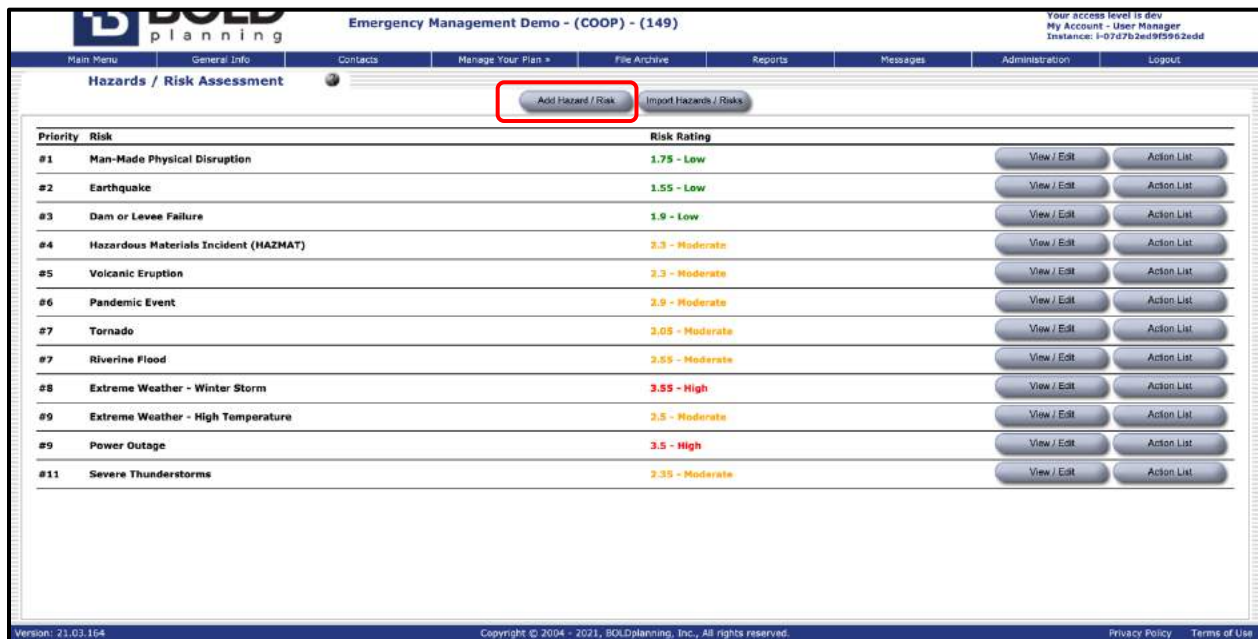


Figure: Add Hazard/Risk

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

BOLDplanning Emergency Management Demo - (COOP) - (149)

Your access level is dev
My Account - User Manager
Instance: 1-07d7b2ed9f9962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Hazards / Risk Assessment

View all Hazard/Risks

Risk Name: Risk Type: Select

Risk Description:

Potential Impact of Event including financial costs:

Probability:* Select
Magnitude / Severity:* Select
* Required

Warning Time:* Select
Duration:* Select

Save Cancel

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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.

BOLDplanning Emergency Management Demo - (COOP) - (149)

Your access level is dev
My Account - User Manager
Instance: 1-07d7b2ed9f9962edd

Main Menu | General Info | Contacts | Manage Your Plan | File Archive | Reports | Messages | Administration | Logout

Hazards / Risk Assessment

Add Hazard / Risk Import Hazards / Risks

Priority	Risk	Risk Rating	Action List
#1	Man-Made Physical Disruption	1.75 - Low	View / Edit Action List
#2	Earthquake	1.55 - Low	View / Edit Action List
#3	Dam or Levee Failure	1.9 - Low	View / Edit Action List
#4	Hazardous Materials Incident (HAZMAT)	2.3 - Moderate	View / Edit Action List
#5	Volcanic Eruption	2.3 - Moderate	View / Edit Action List
#6	Pandemic Event	2.9 - Moderate	View / Edit Action List
#7	Tornado	3.05 - Moderate	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
#9	Extreme Weather - High Temperature	2.5 - Moderate	View / Edit Action List
#9	Power Outage	3.5 - High	View / Edit Action List
#11	Severe Thunderstorms	2.35 - Moderate	View / Edit Action List

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Figure: To Add New Action – Action List

The screenshot shows the 'Emergency Management Demo - (COOP) - (149)' interface. At the top, there is a navigation menu with options: Main Menu, General Info, Contacts, Manage Your Plan, File Archive, Reports, Messages, Administration, and Logout. The current page is 'Hazards / Risk Assessment'. Below the navigation, there are two buttons: 'View All Risks' and 'Add New Action', with the latter highlighted by a red rectangle. The main content area is divided into two sections: 'Preparedness (Pre-Event) Actions for Man-Made Physical Disruption' and 'Response (During Event) Actions for Man-Made Physical Disruption'. Each section contains a list of actions with 'Action' and 'Sort Actions' buttons. The 'Preparedness' section lists 10 actions, and the 'Response' section lists 3 actions. Each action has 'Edit' and 'Delete' buttons next to it. At the bottom of the interface, there is a footer with 'Version: 21.03.164', 'Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.', 'Privacy Policy', and 'Terms of Use'.

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.

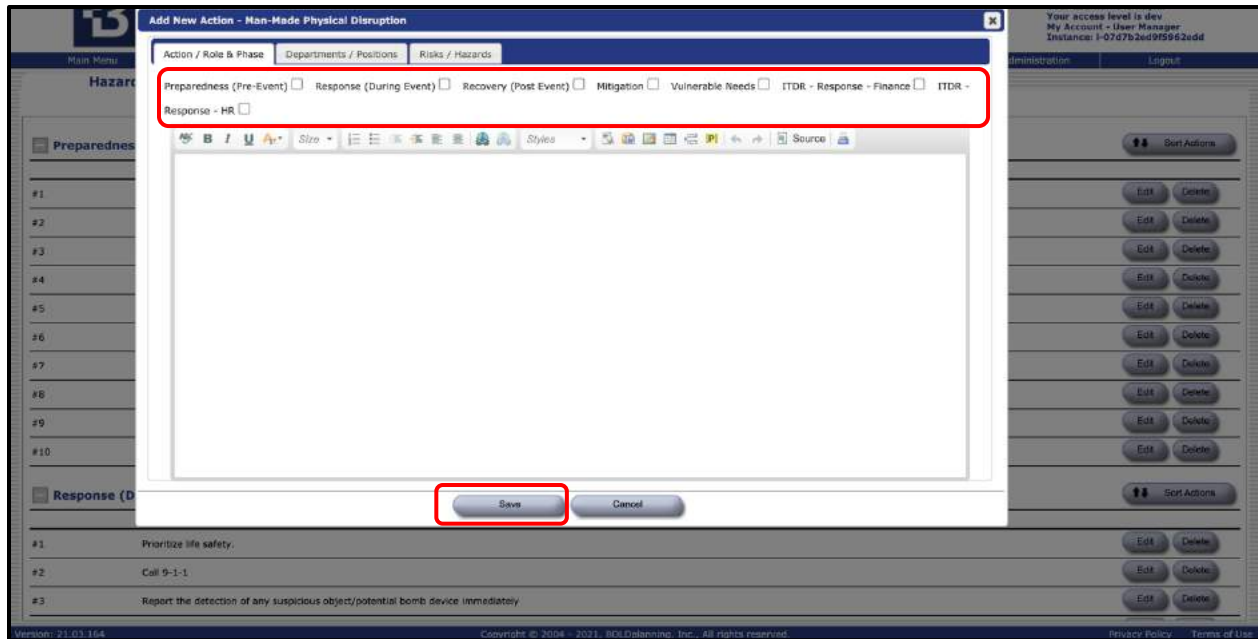


Figure: Description of New Action

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

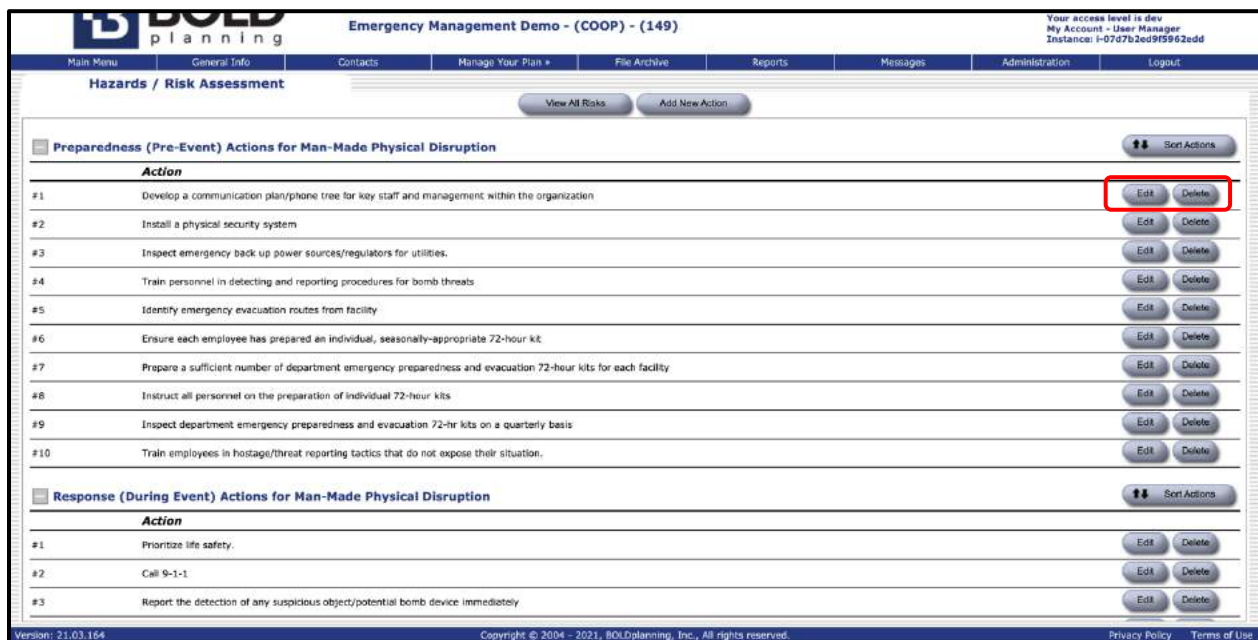


Figure: Edit/Delete a Hazard

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.

The screenshot displays the 'Emergency Management Demo - (COOP) - (149)' interface. The main content area is titled 'Hazards / Risk Assessment' and contains a table of risks. The table has columns for 'Priority', 'Risk', and 'Risk Rating'. Each row includes a 'View / Edit' button and an 'Action List' button. The row for 'Pandemic Event' (Priority #6, Risk Rating 2.9 - Moderate) is highlighted with a red box.

Priority	Risk	Risk Rating	View / Edit	Action List
#1	Man-Made Physical Disruption	1.75 - Low	View / Edit	Action List
#2	Earthquake	1.55 - Low	View / Edit	Action List
#3	Dam or Levee Failure	1.9 - Low	View / Edit	Action List
#4	Hazardous Materials Incident (HAZMAT)	2.3 - Moderate	View / Edit	Action List
#5	Volcanic Eruption	2.3 - Moderate	View / Edit	Action List
#6	Pandemic Event	2.9 - Moderate	View / Edit	Action List
#7	Tornado	3.05 - Moderate	View / Edit	Action List
#7	Riverine Flood	3.55 - Moderate	View / Edit	Action List
#8	Extreme Weather - Winter Storm	3.55 - High	View / Edit	Action List
#9	Extreme Weather - High Temperature	3.5 - Moderate	View / Edit	Action List
#9	Power Outage	3.5 - High	View / Edit	Action List
#11	Severe Thunderstorms	2.35 - Moderate	View / Edit	Action List

Figure: Rearranging Hazards



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

			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:

1. **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.

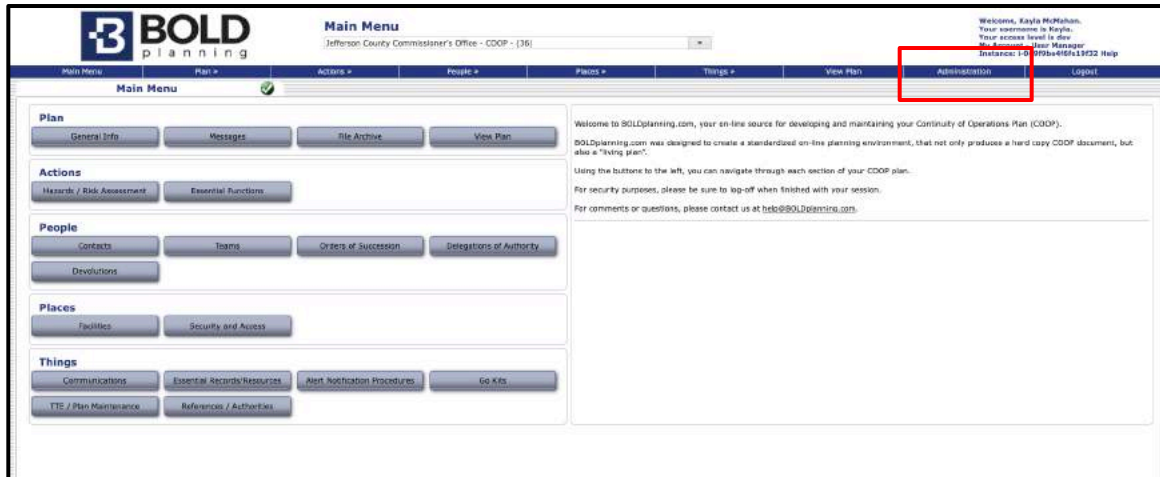
Checking the Status of Your Plan

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.



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



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?

To view activity within the system: select a Plan and/or User, then enter a date range.

Plan:

All Plans	<input type="checkbox"/>
MasterSystem - COOP	<input type="checkbox"/>
[Accelior Corporation - Master Data Area]	<input type="checkbox"/>
Accelior Corporation - Emergency Operations Plan - Emergency Operations Plan	<input type="checkbox"/>
IT Disaster Recovery - Emergency Operations Plan	<input type="checkbox"/>
Accelior Corporation Executive Management - Business Continuity Plan	<input type="checkbox"/>
Accelior Corporation Finance Department - Business Continuity Plan	<input type="checkbox"/>
Accelior Corporation Human Resources - Business Continuity Plan	<input type="checkbox"/>
[BOLDplanning College - Master Data Area]	<input type="checkbox"/>
Leeds College - Emergency Operations Plan	<input type="checkbox"/>

User: All Users

Date Range (MM/DD/YYYY)

Start Date: 08/09/2021 End Date: 08/09/2021

View Online View in Excel

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- 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).

To view activity within the system: select a Plan and/or User, then enter a date range.

Plan:

All Plans	<input type="checkbox"/>
MasterSystem - COOP	<input type="checkbox"/>
[Accelior Corporation - Master Data Area]	<input type="checkbox"/>
Accelior Corporation - Emergency Operations Plan - Emergency Operations Plan	<input type="checkbox"/>
IT Disaster Recovery - Emergency Operations Plan	<input type="checkbox"/>
Accelior Corporation Executive Management - Business Continuity Plan	<input type="checkbox"/>
Accelior Corporation Finance Department - Business Continuity Plan	<input type="checkbox"/>
Accelior Corporation Human Resources - Business Continuity Plan	<input type="checkbox"/>
[BOLDplanning College - Master Data Area]	<input type="checkbox"/>
Leeds College - Emergency Operations Plan	<input type="checkbox"/>

User: All Users

Date Range (MM/DD/YYYY)

Start Date: 08/09/2021 End Date: 08/09/2021

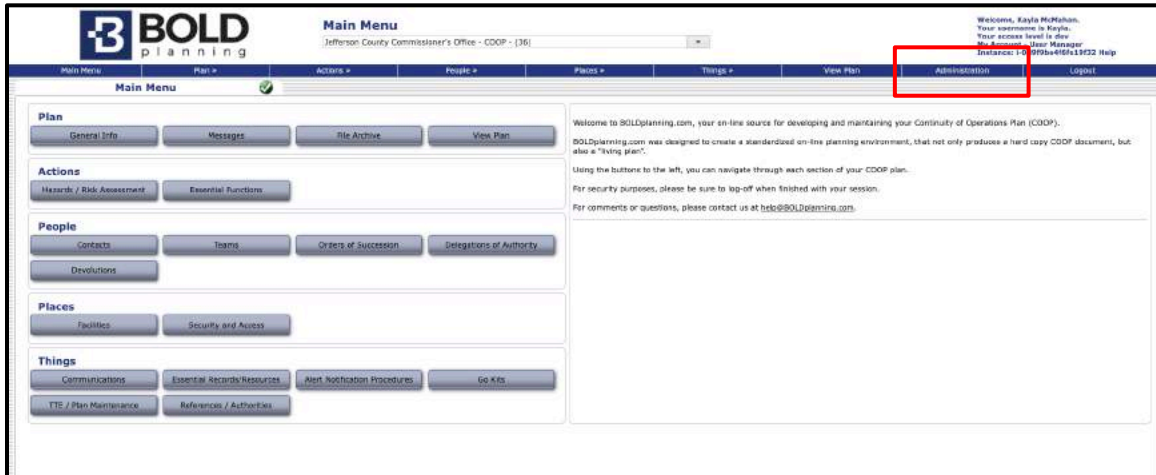
View Online View in Excel

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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.

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



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



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

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User_Report_da...xlsx

Show All

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.

Welcome, Kayla McManis.
Your username is Kayla.
Your access level is dev
User Manager
Instance: 10
9704448513822 Help

Administration

Plan
General Info Messages File Archive View Plan

Actions
Hazards / Risk Assessment Essential Functions

People
Contacts Teams Orders of Succession Delegations of Authority
Devolutions

Places
Facilities Security and Access

Things
Communications Essential Records/Resources Alert Notification Procedures Go Kits
ITC / Plan Maintenance References / Authorities

Welcome to BOLDplanning.com, your on-line source for developing and maintaining your Continuity of Operations Plan (COOP).
BOLDplanning.com was designed to create a standardized on-line planning environment, that not only produces a hard copy COOP document, but also a "living plan".
Using the buttons to the left, you can navigate through each section of your COOP plan.
For security purposes, please be sure to log-off when finished with your session.
For comments or questions, please contact us at help@BOLDplanning.com.

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

The screenshot shows the BOLDplanning web application interface for 'Accelior Corporation Executive Management - (Business Continuity Plan) - (59)'. The top navigation bar includes 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan >', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The 'Reports' section is highlighted, and the 'User / Access Report by Plan' button is circled in red. The interface is divided into four columns: Plans, Users, Reports, and Surveys. The 'Plans' column contains buttons for 'Create New Plan', 'Delete a Plan(s)', 'System Wide Properties', 'System Default Properties', 'Plan Wide Properties', 'System Wide Messages', 'Edit Helper Tips', 'Edit System Emails', 'Base Plan Editor', 'Add / Edit Functions', 'Add / Edit Grade Comments', and 'Add / Edit Codes & Selections'. The 'Users' column contains buttons for 'User Manager', 'Current Users', 'System Wide Current Users', 'Audit Logs', 'Impersonate User', and 'Review Changes'. The 'Reports' column contains buttons for 'Overall System Report', 'Plan Summary', 'Plan Grades / Report Card', 'User / Access Report by Plan', 'User / Access Report by User', 'HSEEP Events Report', 'Deconfliction Report', 'Interdependency Report', and 'Roll Up Report'. The 'Surveys' column contains a button for 'Survey Results'. The footer includes 'Version: 21.03.171', 'Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.', 'Privacy Policy', and 'Terms of Use'.

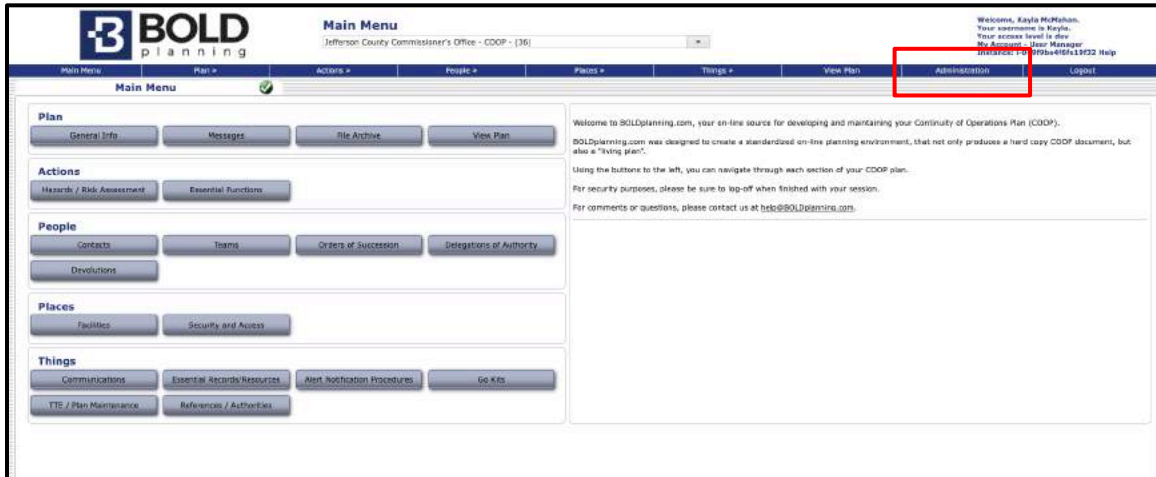
3. A download of the report will now begin and will allow you to open the report in Microsoft Excel.

The screenshot shows the BOLDplanning web application interface for 'Accelior Corporation Executive Management - (Business Continuity Plan) - (59)'. The top navigation bar includes 'Main Menu', 'General Info', 'Contacts', 'Manage Your Plan >', 'File Archive', 'Reports', 'Messages', 'Administration', and 'Logout'. The 'Reports' section is highlighted, and the 'User / Access Report by Plan' button is highlighted. The interface is divided into four columns: Plans, Users, Reports, and Surveys. The 'Plans' column contains buttons for 'Create New Plan', 'Delete a Plan(s)', 'System Wide Properties', 'System Default Properties', 'Plan Wide Properties', 'System Wide Messages', 'Edit Helper Tips', 'Edit System Emails', 'Base Plan Editor', 'Add / Edit Functions', 'Add / Edit Grade Comments', and 'Add / Edit Codes & Selections'. The 'Users' column contains buttons for 'User Manager', 'Current Users', 'System Wide Current Users', 'Audit Logs', 'Impersonate User', and 'Review Changes'. The 'Reports' column contains buttons for 'Overall System Report', 'Plan Summary', 'Plan Grades / Report Card', 'User / Access Report by Plan', 'User / Access Report by User', 'HSEEP Events Report', 'Deconfliction Report', 'Interdependency Report', and 'Roll Up Report'. The 'Surveys' column contains a button for 'Survey Results'. The footer includes 'Version: 21.03.171', 'Copyright © 2004 - 2021, BOLDplanning, Inc., All rights reserved.', 'Privacy Policy', and 'Terms of Use'. A download bar at the bottom shows a file named 'User_Report_de...xlsx' with a 'Show All' button.

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.



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

planning Accellor Corporation Executive Management - (Business Continuity Plan) - (59) My Account - User Manager Instance: i-07d7b2ed9f5962edd

Main Menu General Info Contacts Manage Your Plan » File Archive Reports Messages Administration Logout

Roll Up Report

Plan Selection: COOP Report Type: Interdependency Report / Vital Records 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 - 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

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

planning Accellor Corporation Executive Management - (Business Continuity Plan) - (59) My Account - User Manager Instance: i-07d7b2ed9f5962edd

Main Menu General Info Contacts Manage Your Plan » File Archive Reports Messages Administration Logout

Roll Up Report

Plan Selection: COOP Report Type: Interdependency Report / Vital Records 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 - 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

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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).

planning Accellor Corporation Executive Management - (Business Continuity Plan) - (59) My Account - User Manager
Instance: 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: Interdependency Report / Vital Records Report Output: Excel

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 - 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

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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).

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Instance: 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: Interdependency Report / Vital Records Report Output: Excel

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 - 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

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

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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.

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

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

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My Account - User Manager
Instance: i-07d7b2ed9f5962edd

Main Menu | General Info | Contacts | Manage Your Plan » | File Archive | Reports | Messages | Administration | Logout

Administrative Controls

Plans	Users	Reports	Surveys
Create New Plan	User Manager	Overall System Report	Survey Results
Delete a Plan(s)	Current Users	Plan Summary	
System Wide Properties	System Wide Current Users	Plan Grades / Report Card	
System Default Properties	Audit Logs	User / Access Report by Plan	
Plan Wide Properties	Impersonate User	User / Access Report by User	
System Wide Messages	Review Changes	HSEEP Events Report	
Edit Helper Tips		Deconfliction Report	
Edit System Emails		Interdependency Report	
Base Plan Editor		Roll Up Report	
Add / Edit Functions			
Add / Edit Grade Comments			
Add / Edit Codes & Selections			

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

BOLDplanning Roll Up Report Accelior Corporation Executive Management - (Business 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 | Administration | Logout

Roll Up Report

Plan Selection: COOP Report Type: Deconfliction Report - Staff Report Output: Excel Generate Report

Select All Search / Filter: _____

<input type="checkbox"/> *MasterSystem* - COOP
<input type="checkbox"/> Department of Information Technology - COOP
<input type="checkbox"/> Department of Public Works - COOP
<input type="checkbox"/> Emergency Management - COOP
<input type="checkbox"/> Jefferson County Commissioner's Office - COOP
<input type="checkbox"/> Jefferson County Finance Department - COOP
<input type="checkbox"/> Jefferson County Human Resources Department - COOP
<input type="checkbox"/> Jefferson County Information Technology Department - COOP
<input type="checkbox"/> Metro Airport Authority Operations - COOP
<input type="checkbox"/> Metro Airport Authority Security - COOP
<input type="checkbox"/> Public Health Department - Director's Office, Administration and Finance - COOP
<input type="checkbox"/> Public Health Department - Emergency Preparedness and Response - COOP

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

BOLDplanning Roll Up Report
Accelior Corporation Executive Management - (Business Continuity Plan) - (59)

Welcome, Kayla McMahan.
Your username is Kayla.
Your access level is dev
My Account - User Manager
Instance: l-07d7b2ed9f5962edd

Main Menu General Info Contacts Manage Your Plan File Archive Reports Messages Administration Logout

Roll Up Report

Plan Selection: COOP Report Type: Deconfliction Report - Staff 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 - 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

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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).

BOLDplanning Roll Up Report
Accelior Corporation Executive Management - (Business Continuity Plan) - (59)

Welcome, Kayla McMahan.
Your username is Kayla.
Your access level is dev
My Account - User Manager
Instance: l-07d7b2ed9f5962edd

Main Menu General Info Contacts Manage Your Plan File Archive Reports Messages Administration Logout

Roll Up Report

Plan Selection: COOP Report Type: Deconfliction Report - Staff 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 - 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

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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).

BOLDplanning Roll Up Report
Accelior Corporation Executive Management - (Business 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 | Administration | Logout

Roll Up Report

Plan Selection: COOP + X Report Type: Deconfliction Report - Staff 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 - 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

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

BOLDplanning Roll Up Report
Accelior Corporation Executive Management - (Business 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 | Administration | Logout

Roll Up Report

Plan Selection: COOP + X Report Type: Deconfliction Report - Staff Report Output: Excel Generate Report

Select All Search / Filter:

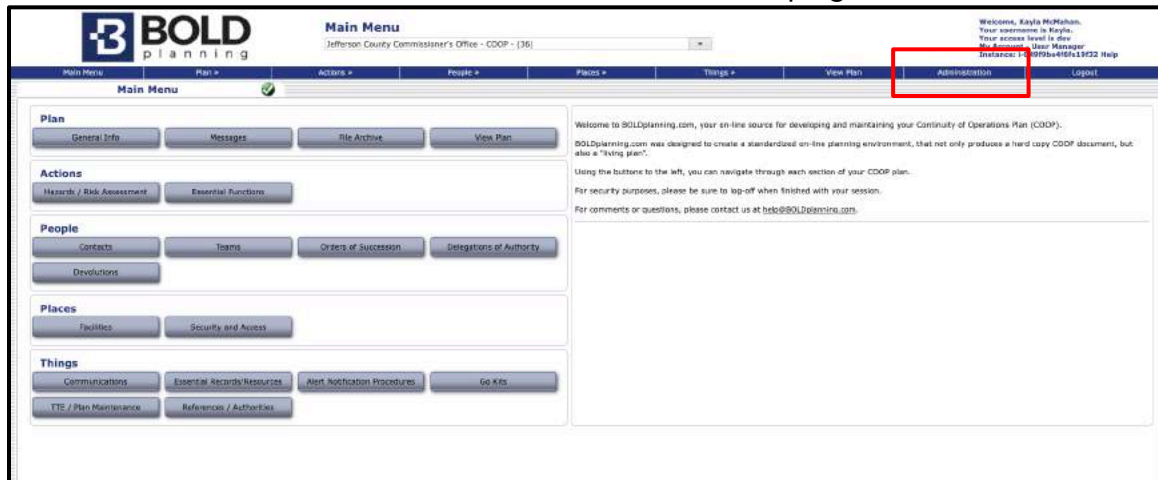
- *MasterSystem* - COOP
- Department of Information Technology - COOP
- Department of Public Works - COOP
- Emergency Management - COOP
- Jefferson County Commissioner's Office - COOP
- Jefferson County Finance Department - COOP
- Jefferson County Human Resources Department - COOP
- Jefferson County Information Technology Department - COOP
- Metro Airport Authority Operations - COOP
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- Public Health Department - Director's Office, Administration and Finance - COOP
- Public Health Department - Emergency Preparedness 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.

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.



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

BOLDplanning Accelior Corporation Executive Management - (Business Continuity Plan) - (59) 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

Roll Up Report

Plan Selection: COOP + X Report Type: EF/PMEF - All Functions Combined Report Output: Excel

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 - 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

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

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My Account - User Manager
Instance: 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: EF/PMEF - All Functions Combined Report Output: Excel

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 - 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

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- 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).

BOLDplanning Accelior Corporation Executive Management - (Business Continuity Plan) - (59) 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

Roll Up Report

Plan Selection: COOP + X Report Type: EF/PMEF - All Functions Combined Report Output: Excel

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 - 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

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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).

BOLDplanning Accelior Corporation Executive Management - (Business Continuity Plan) - (59) 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

Roll Up Report

Plan Selection: COOP + X Report Type: EF/PMEF - All Functions Combined Report Output: Excel

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 - COOP
- Jefferson County Information Technology Department - COOP
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- Public Health Department - Emergency Preparedness and Response - COOP

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

BOLDplanning **Accelior Corporation Executive Management - (Business Continuity Plan) - (59)** 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

Roll Up Report

Plan Selection: COOP + X Report Type: EF/PMEF - All Functions Combined 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 - 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

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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.

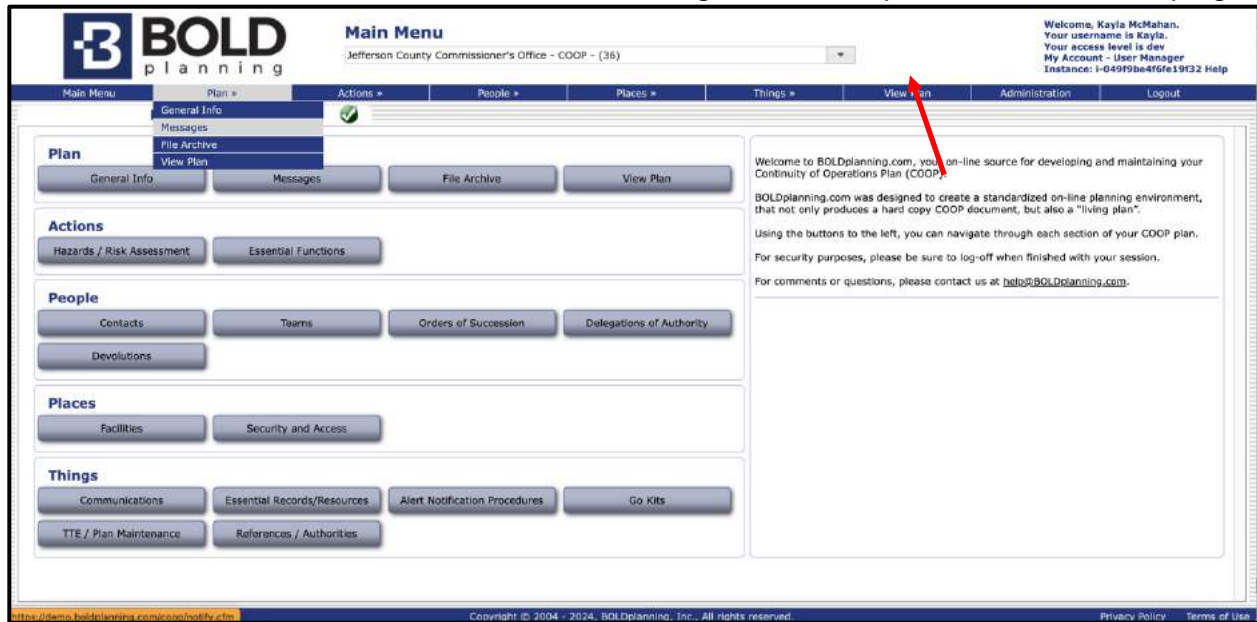


Figure: Messages Tab

2. Click on the "Compose Email" button.



Figure: Compose Email Button

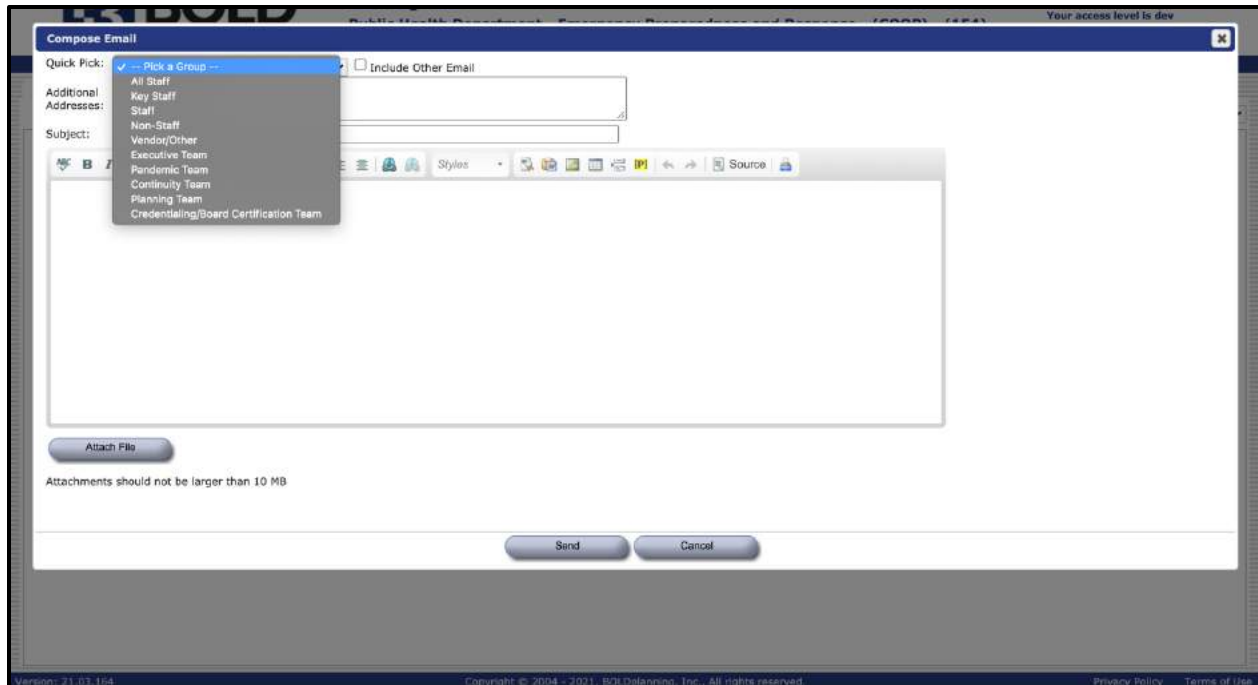


Figure: Picking a Group to Email

3. If you have entered contacts, labeled them under a certain category (e.g., all staff, key staff, staff, etc.) and 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.