

QUICKSTART GUIDE – (COOP) CONTINUITY OF OPERATIONS

BOLDplanning Planning Platform

The centerpiece of your organization's continuity operations planning strategy is the BOLDplanning platform. This platform can be accessed through any internet browser and uses the latest internet security protocols to safeguard all your organization's data. When your credentials are made, you will receive **TWO** emails. One email will have your username and the other email will have your temporary password. Once logged in, you will be prompted to update your contact information and create a new password of your own.

To log onto the platform:

1. Go to your unique website (FLHCC.boldplanning.com) 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.

Building Your Continuity of Operations Plan

Please enter data using the main menu items in the order below:

Contacts

- Add in contacts that have a role or responsibility within your plan. These may be people inside or outside of your organization or even vendors.
- When adding in contacts, there is a location quick pick. This location quick pick will be populated once you add your facilities into your Facilities button. You may go back to each contact and add the facility in once it is populated in 'Facilities.'

Facilities

- Add in primary and alternate facilities for your organization through the 'Facilities' button.
- You may add in the facility manager for each facility. A facility manager must be added in the contacts button for it to populate within the 'Facility Manager'

drop-down.

- Make sure to assign your alternate facilities to each primary listed (at least three alternates are recommended for each primary facility).

General Information Section

Fill in information pertaining to your facility. Choosing options in this section populate many places around the plan using dynamic tags. In this section you'll contribute information such as:

- Organization Name
- Mission Statement
- Supersession Statement
- Organization designated for Devolution.

Orders of Succession

Create succession lines for key leadership positions within your organization. I.e., administrator, 'Planning Team Chief,' etc.

- The members within succession lines pull from your contacts. They need to be added to your contacts first, before adding them to each succession line.

Delegations of Authority

Create delegations for any key authorities that may exist within your organization such as facility closure, spending money, or making HR decisions.

- Members within each delegation pull from your contacts. They need to be added to your contacts first, before adding them to each authority.

Teams

Add in teams that exist within your response plan. Each member of the team needs to be added to 'Contact' first, and then once added, you may assign them to your team.

Security and Access

Add information pertaining to each of your facilities.

- Physical access/controls
- Cybersecurity information (no sensitive data should be added)
- Evacuation Procedures

Support: help@boldplanning.com

Essential Records/Resources

Please add in any essential records/resources that assist you in performing your essential functions.

- I.e., Enterprise System, hardware, software, web-based system, etc.
- Document who protects and maintains this record.
- Where is this record located?

Communications

Add any communications equipment your organization utilizes to communicate.

- Cell phone
- Email
- Website

Alert Notification Procedures

Input any alert notifications your organization utilizes.

- How do you notify your staff?
- How does your staff respond?
- How do you notify those outside your organization?

Go Kits

Please identify any 'Go Kits' that exist within your organization. A 'Go Kit' is identified as essential items pre-packed by your organization that will be used to establish recovery operations during the onset of relocation to an alternate facility.

References/Authorities

Please enter any references/authorities that pertain to your plan.

Test, Training, and Exercise

Please enter any tests, exercises and training scheduled or completed, as well.

Hazard Analysis (Hazard/Risk Assessment)

- Identify each hazard your organization is susceptible to.
- Fill in your jurisdictional profile and geographic information for each site.

Mission Essential Functions

Mission Essential Functions are considered functions that cannot be deferred during an emergency or disaster. MEFs are very high level. An agency can begin identifying its MEFs by asking:

- What is our mission?
- What is our purpose?
- Which public goods or services do we provide, and to whom?
- Which of these goods and services absolutely cannot be deferred during an emergency?
 - To prioritize functions, establish Recovery Time Objectives.
- What is the agency required to do by law, executive order, or directive?

An agency should first look at the statutory requirements assigned to it by law. MEFs can also be components of the agency's mission statement or strategic plan. MEFs are typically something unique that the agency or institution of higher education does, such as provide a product or service to the public, another agency, or some other external body.

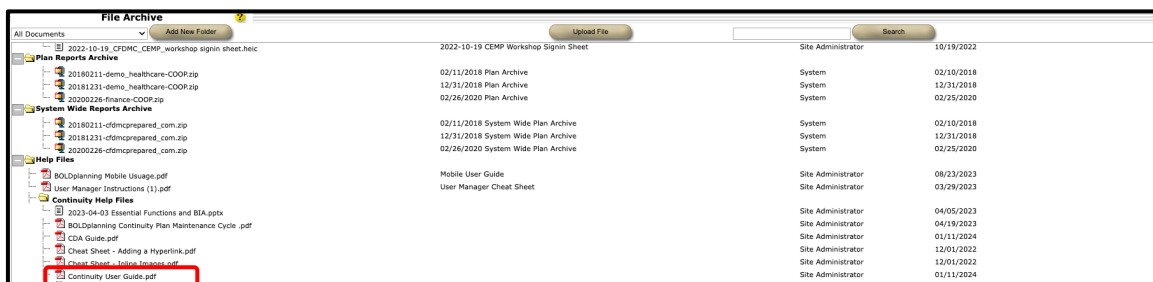
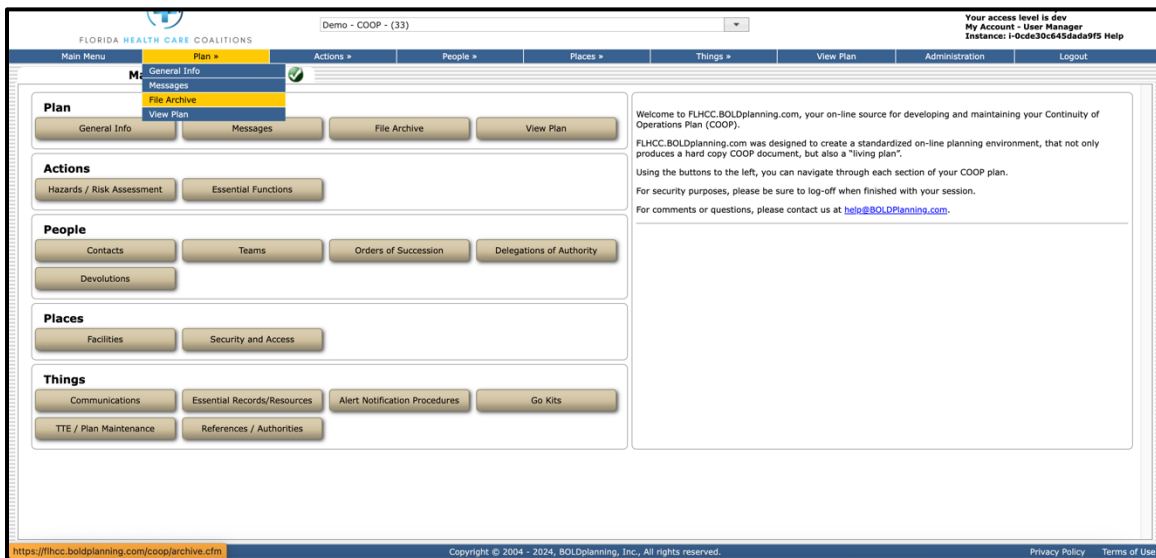
Make sure to utilize the 'Link People,' 'Link Essential Records,' and 'Link Facilities' button within each Essential Function to link your interdependencies.

- Who do we need to perform this function?
- What essential records do we need to help us perform this function?
- Where is this function being performed on a regular 'blue sky' day?
 - Where would this function relocate to in a disruption?

The screenshot shows a web-based form titled "Essential Functions" from the Florida Health Care Coalitions. The form has a header with navigation tabs: Main Menu, Plan, Actions, People, Places, Things, View Plan, and Administration. The main content area is titled "Please Enter the Essential Function" and contains a rich text editor toolbar. Below the editor are several form fields: "Tier" (dropdown menu), "Organizational Unit" (dropdown menu), "Is this a PMEF?" (checkbox), and "Is this a Public-Facing Function?" (dropdown menu). At the bottom of the form are "Save" and "Cancel" buttons. On the right side of the form, three buttons are highlighted with a red box: "Link Facilities", "Link People", and "Link Essential Records".

BOLDplanning Resources

For more information on system functionality, please refer to the 'FLHCC (COOP or CEMP) User Guide' within the File Archive when you are logged into the BOLDplanning platform.



Support: help@boldplanning.com

