EOP ASSIST 3.0:

A Software Application for
K-12 Schools, School Districts, and State Agencies

User Manual

Updated February 2017

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Chapter 1: Introduction

EOP ASSIST is a software application designed to help K-12 school administrators and emergency management personnel create customized school emergency operations plans (EOPs) that address a variety of threats and hazards. The application was developed by the U.S. Department of Education's Office of Safe and Healthy Students and the Readiness and Emergency Management for Schools (REMS) Technical Assistance (TA) Center. This user-friendly application is based on the *Guide for Developing High-Quality School Emergency Operations Plans* (*School Guide*). The *School Guide*, released by the White House in June 2013, is a joint publication of six Federal agencies. It was built on years of emergency planning work by the Federal government and on lessons learned from recent emergency events.

Overview

In keeping with the *School Guide*, EOP ASSIST walks users through the recommended planning process to help schools develop or revise their school EOPs. This process includes the following six steps:

1. Form a Collaborative Planning Team;
2. Understand the Situation;
3. Determine Goals and Objectives;
4. Plan Development (Identify Courses of Action);
5. Prepare, Review, and Approve the Plan; and
6. Implement and Maintain the Plan.

To support the planning process, EOP ASSIST also includes guidance, resources, and tools, such as a calendar for scheduling regular plan reviews. Once users complete the six-step planning process, they will have a comprehensive, customized, and easy-to-update school EOP. This EOP will reflect the recommendations of Federal agencies tasked with addressing issues of emergency preparedness.

Intended Audience

Because operational planning is best performed by a team, EOP ASSIST is designed to facilitate collaboration among a team of users. Each member of a school's collaborative planning team can add, edit, and update any portion of his or her school EOP using the application. Additionally, district-level emergency management personnel can contribute to each school EOP and can oversee plan development for individual schools within their district. Further, state agencies can develop sample school EOPs and review school EOPs directly through the application, if the feature is enabled.

Federal guidance recommends that a school's collaborative planning team include a wide range of school personnel, its families, and its community. As such, EOP ASSIST users may represent any of the following stakeholder groups: the school district or local education agency (LEA); the whole school community; local community partners with a responsibility in school emergency management; and the state department of education. It also can include the state education agency (SEA); state community partners; regional education agency (REA); and/or additional partners with a role in school emergency management.

How to Use This Manual

This user manual includes helpful instructions for using EOP ASSIST and information about where to go for additional help. This manual is organized by chapters, which are summarized below:

- **Chapter 1** provides an overview of EOP ASSIST.
- **Chapter 2** helps users get started using EOP ASSIST, whether the application is hosted at the state level, district level, or school level.
- **Chapter 3** provides information on account management, including how to log in and log out.
- **Chapter 4** reviews the overall layout of the app's sections and its features.
- **Chapter 5** contains a description of the app's features for developing a school EOP.
- **Chapter 6** describes the added management capabilities of the application for School Administrators, District Administrators, State Administrators, and the Super Administrator.
- **Appendix A** recommends solutions for addressing different scenarios that users may encounter while using the application.
- **Appendix B** shows how the application is organized.
- **Appendix C** is a glossary that defines special terms used in the manual and in the application.

Important Considerations

When reviewing this user manual, you will notice that EOP ASSIST 3.0 was intended for K-12 schools and districts. With that in mind, the software application was designed to be installed on one of three hosting levels described below. It is important to be aware of the hosting level of your institution, so that you may reference the appropriate subsections throughout this documentation.

- **State-level hosting** allows state agencies (or REAs), multiple districts, their schools, and independent schools to have access to and different roles within the application. Typically, a state agency or REA will host the application at this level so that all schools and districts within their jurisdiction may log in to the application to develop and revise their school EOPs, which are stored on the state's or REA's server.
- **District-level hosting** allows one district and its schools to have access to and different roles within the application. Only individuals from the district office and schools throughout the district may log in to the application to develop and revise their school EOPs, which are stored on the district's server.
- **School-level hosting** allows an individual school, regardless of whether it is public or non-public, to host the application on its own server for itself. Only individuals from that school's planning team may log in to the application to develop and revise their school EOP, which is stored on the school's server.

For more information on downloading and installing the application, including its technical requirements, please refer to the *EOP ASSIST 3.0 Installation Manual*.

Resources

The REMS TA Center has developed a number of supplemental resources, in addition to this user manual, to assist school emergency management practitioners in using EOP ASSIST. These resources may also be used to promote EOP ASSIST and introduce the application to colleagues.

Video Tutorials

An Overview of the Features and Functions of EOP ASSIST
This video provides an overview of the general layout of the application and shows users how to log in, log out, and change their password. https://www.youtube.com/watch?v=GGAUYcC9Krw

Using EOP ASSIST as an Administrator
This video provides information on some of the management features of the application and focuses on School Administrators and District Administrators, and how they can manage user accounts, school profiles, and school EOPs. https://www.youtube.com/watch?v=-_uAYLFQU9o

Creating a School EOP With EOP ASSIST: A Focus on the Planning Process Video Tutorial
This video provides information on generating a school EOP using the application and reviews the Planning Process and My EOP sections. https://www.youtube.com/watch?v=ODHH2k47Yj0

Community of Practice Forum

EOP ASSIST Discussion—This forum allows current and potential users to share feedback, exchange ideas, and pose questions.
http://rems.ed.gov/COP/REMSCOPforum/topics.aspx?ForumID=85

Flyer

EOP ASSIST 3.0 Product Description
This downloadable and distributable flyer provides an overview of the application and its technical requirements, and is intended for practitioners who are interested in potentially using EOP ASSIST. https://rems.ed.gov/Docs/EOP_ASSIST_2.0_Product_Desc.pdf

Webinar

EOP ASSIST: Features, Functions, and Recent Enhancements
This Webinar provides an overview of the application's features and functions and demonstrates how practitioners may use it to develop school EOPs. This includes information on management features for states, districts, and schools.
https://rems.ed.gov/EOPASSISTFeaturesandRecentEnhancements.aspx

Downloadable Presentations

An Overview of the Features & Functions of EOP ASSIST 2.0 for School & School District Hosts and Their Stakeholders
This presentation provides an overview of the application and its setup when it is hosted by schools, districts, or other local agencies.
https://rems.ed.gov/Docs/EOP_ASSIST_2_0_OverviewSchoolDistrictHostsStakeholders.pptx

An Overview of the Features & Functions of EOP ASSIST 2.0 for State Agency Hosts and Their Stakeholders
This presentation provides an overview of the application and its setup when it is hosted by state agencies and regional agencies on behalf of multiple schools and districts.
https://rems.ed.gov/Docs/EOP_ASSIST_2_0_OverviewStateAgencyHostsStakeholders.pptx

Overview of the EOP ASSIST Software Application
This presentation provides a brief overview of the application when it is hosted by schools or districts.
https://rems.ed.gov/Docs/EOP_ASSIST_Overview.ppt

Technical Assistance

The REMS TA Center is pleased to offer EOP ASSIST to support schools and school districts in creating high-quality school EOPs. For further assistance using this application, please contact the Help Desk via email at info@remstacenter.org or by phone, toll-free, at 1-855-781-REMS [7367]. Our hours of operation are Monday through Friday, 9:00 a.m. to 5:00 p.m., Eastern Time.

Let's start planning!

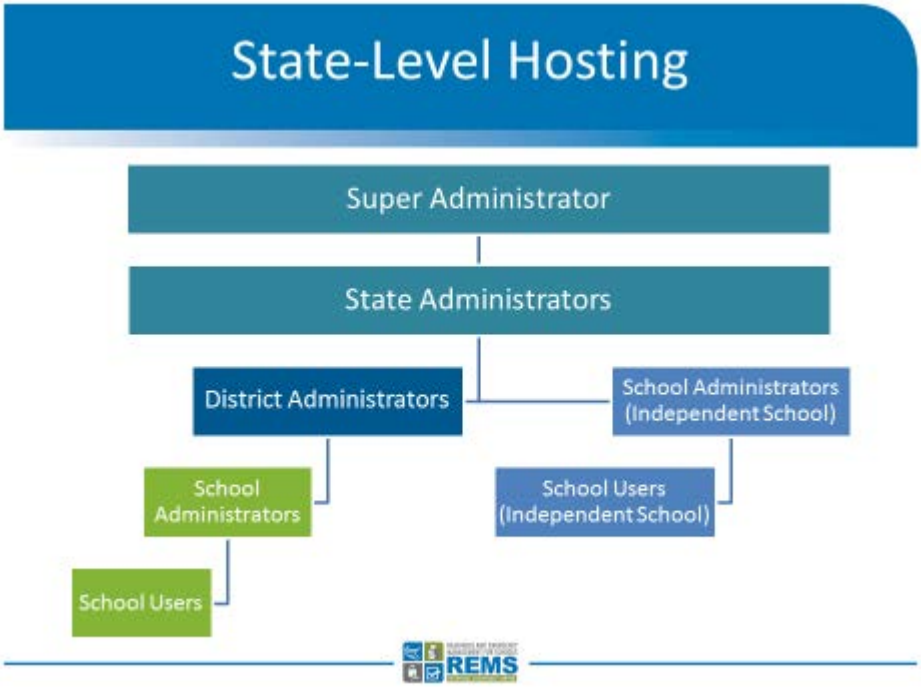
Chapter 2: Getting Started

Welcome to EOP ASSIST 3.0! At this point, your information technology (IT) personnel have downloaded the application and installed it on your institution's server. Your IT personnel (as the Super Administrator) have also set up your institution's account and created the appropriate initial user accounts. More information on the Super Administrator's initial responsibilities may be found in the *EOP ASSIST 3.0 Installation Manual.*

It is important to recognize whether your institution is hosting the application at the state, district, or school level. Please review the following subsection that is applicable to your institution.

State-Level Hosting

This allows state agencies (or REAs), multiple districts, their schools, and independent schools to have access to and different roles within the application. Typically, a state agency or REA will host the application at this level so that all schools and districts within their jurisdiction may log in to the application to develop and revise their school EOPs, which are stored on the state's or REA's server. Below is an image of the hierarchy of various user roles within EOP ASSIST in state-level hosting.



The Super Administrator should have already set up the state account, as outlined in the *EOP ASSIST 3.0 Installation Manual*, and created at least one State Administrator account that is associated with the state agency or REA. Once the State Administrator's log-in credentials are shared with him or her, the State Administrator is responsible for creating profiles and user accounts, who will then grant access to

subsequent levels. Below is an overview of the initial responsibilities of each user role available in state-level hosting.

- **Super Administrator**
  - Sets up the state account
  - Creates at least one State Administrator account
- **State Administrator**
  - Creates additional State Administrator accounts
  - Creates district profiles
    - Creates at least one District Administrator account per district profile
  - Creates independent school profiles
    - Creates at least one School Administrator account per independent school profile
- **District Administrator**
  - Creates additional District Administrator accounts
  - Creates school profiles
    - Creates at least one School Administrator account per school profile
- **School Administrator**
  - Creates additional School Administrator accounts
  - Creates School User accounts
- **School User**
  - No management responsibilities

Please refer to the following subsection that correlates with your user role, in order to learn more about your responsibilities.

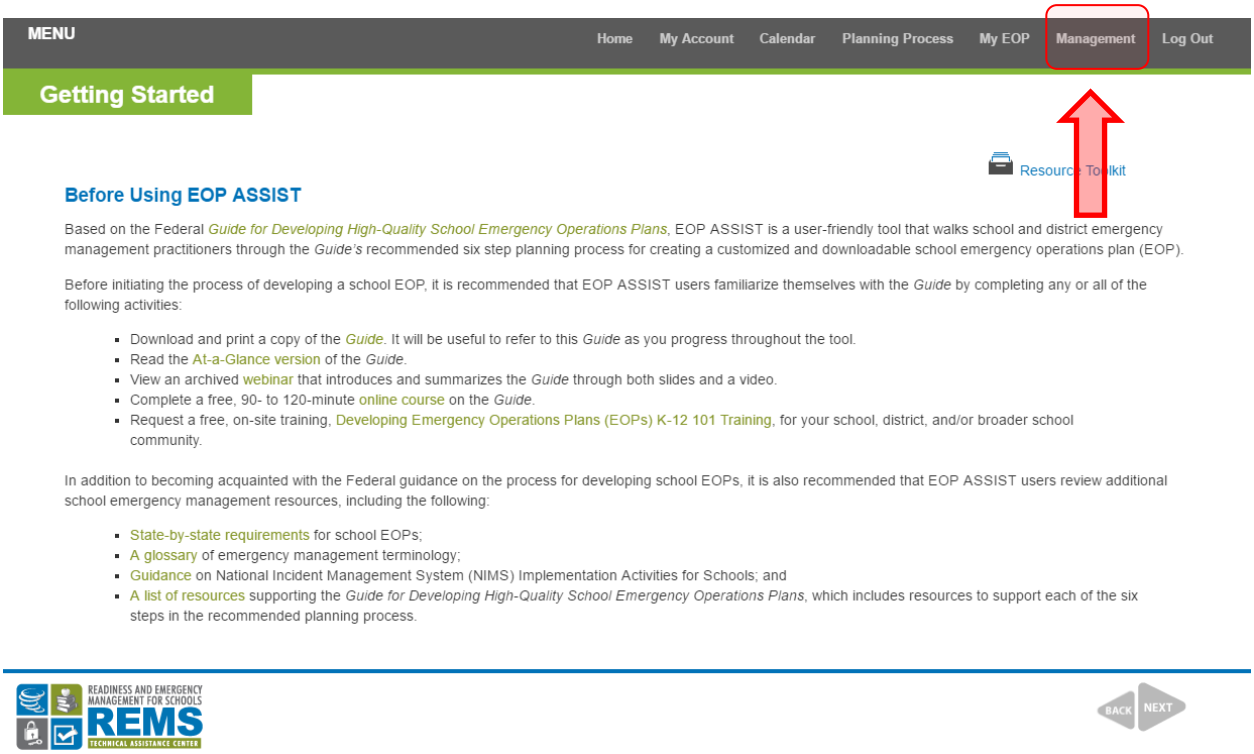
Super Administrator Responsibilities

Typically, the Super Administrator is IT personnel at the state agency or REA hosting the application, and is the user role for which at least three individuals at the state agency or REA should have access to the log-in credentials. The Super Administrator serves as the database manager and is responsible for installing EOP ASSIST 3.0. He or she also sets up the state's account, creates log-in credentials for at least one State Administrator, and shares the first State Administrator's log-in credential with him or her. From this point on, the Super Administrator is responsible for managing the back-end database, as needed, and the Website through which the application is accessed by all users. The Super Administrator has access to all management features outlined in Chapter 6, and so he or she can reset any user's password, if requested.

For instructions on how to set up the state's account and create a State Administrator, please refer to the *EOP ASSIST 3.0 Installation Manual.*

State Administrator Responsibilities

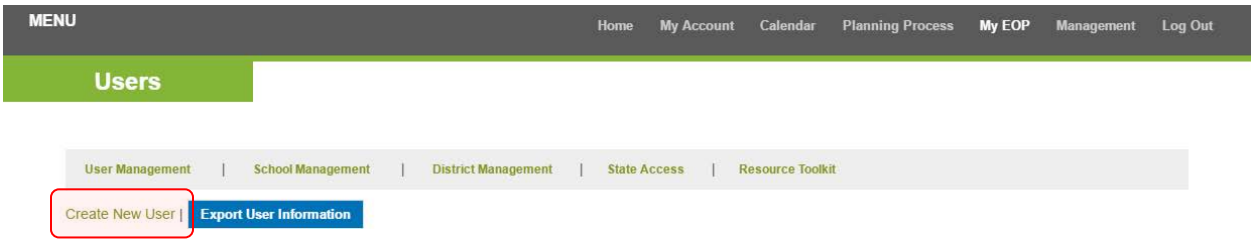
As a State Administrator, you will need to create additional State Administrator accounts, district profiles, at least on District Administrator account per district profile, independent school profiles, and at least on School Administrator account per independent school profile. To begin, sign in to the application using the log-in credentials provided by the Super Administrator and navigate to the Management section.



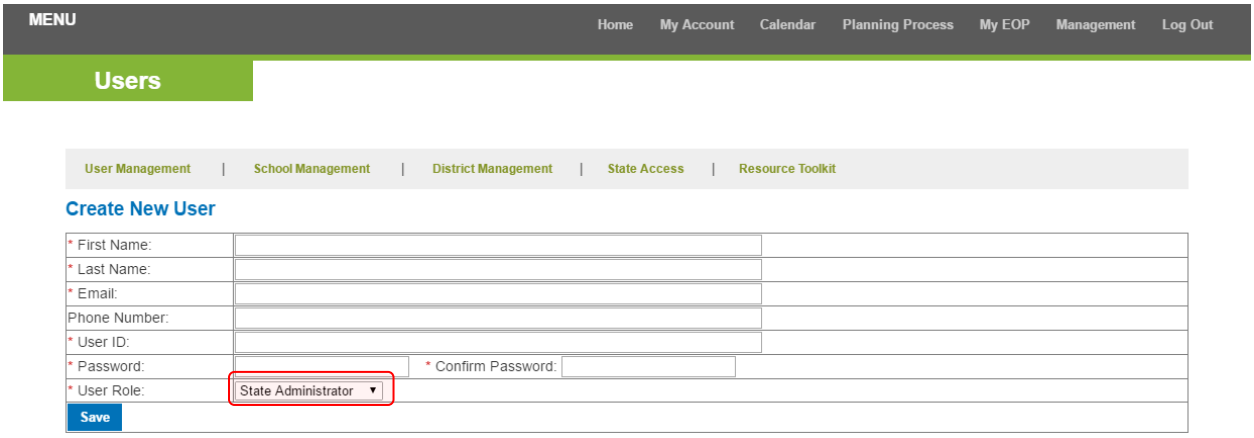
Create State Administrator Accounts

It is important for you to create accounts for your colleagues with a role in school emergency management planning at the state level, so that the appropriate parties have access to the application to review school EOPs, collaborate on statewide emergency management planning efforts, and communicate state requirements. All personnel at the state level have the same permissions and will be assigned the State Administrator user role. So, the additional State Administrators have the capability to help you create district profiles, District Administrator accounts for each of those district profiles, school profiles for independent schools, and School Administrator accounts for each of those school profiles, which are described in the subsequent subsections.

1. Click the **Create New User** button.

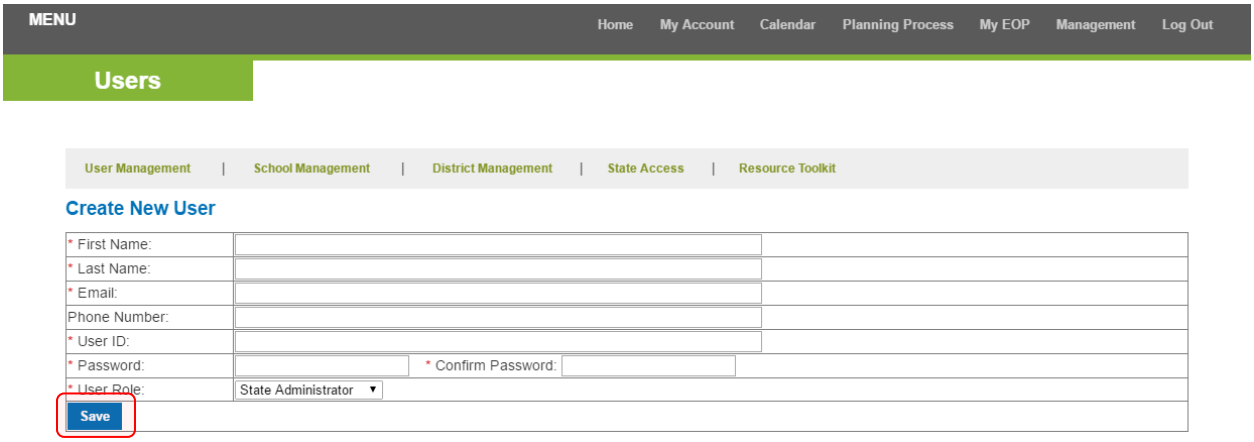


2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **State Administrator** in the User Role dropdown menu.

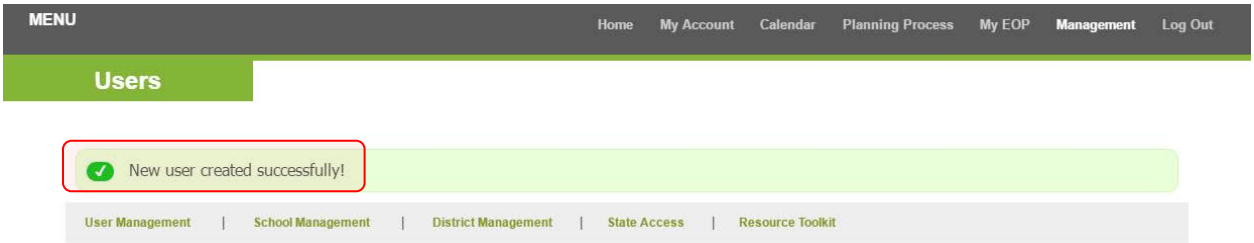


3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.

4. Click the **Save** button.



5. The State Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate state personnel with a role in school emergency management planning have an account in the application. The REMS TA Center recommends that there are at least three State Administrator accounts for each state agency or REA hosting EOP ASSIST.

Share Log-In Credentials With the State Administrators

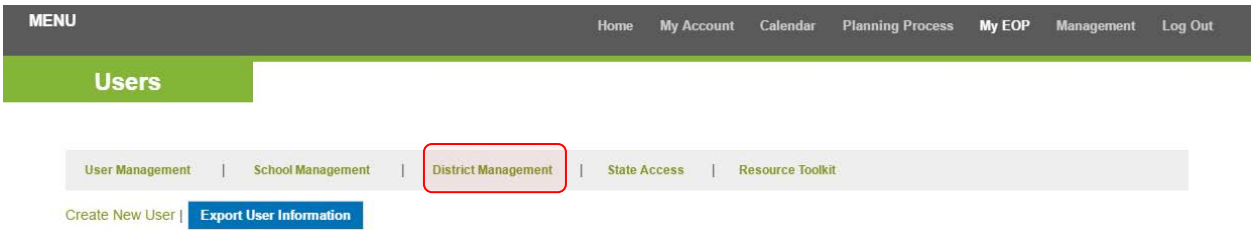
It is important to share the newly created State Administrator accounts' log-in credentials with them, so that they can log in and use the application. They may also help you fulfill your remaining responsibilities, since they have the same permissions as you. The REMS TA Center recommends that you share all of the following information with each State Administrator:

- User ID of the State Administrator account;
- Password of the State Administrator account;
- Reminder that the State Administrator may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

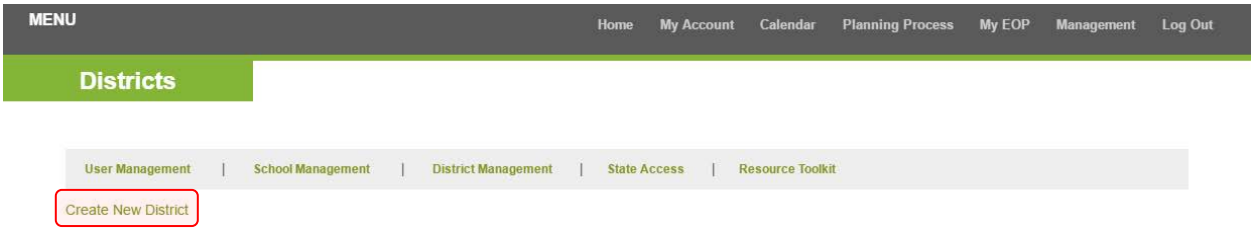
Create District Profiles

You will need to create a profile for each district within your state, so that they can use the application to support their school emergency management planning efforts and have access to the appropriate information. District profiles allow district personnel to manage and oversee school profiles and school EOPs in their district.

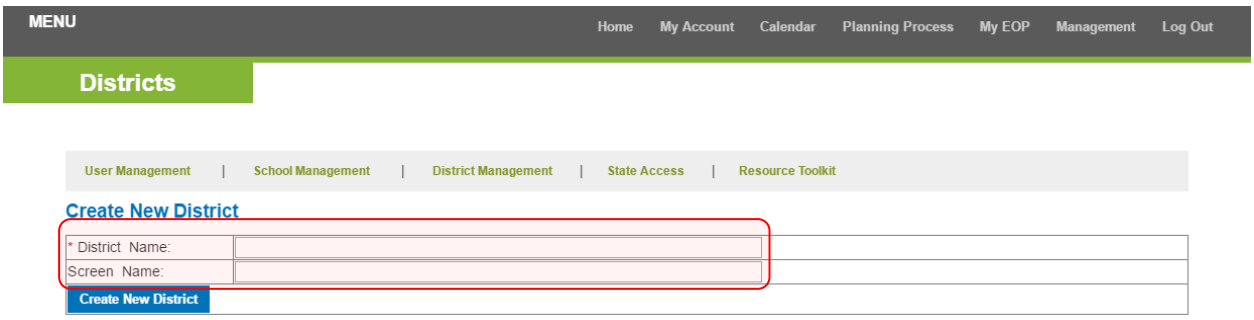
1. Select the **District Management** tab.



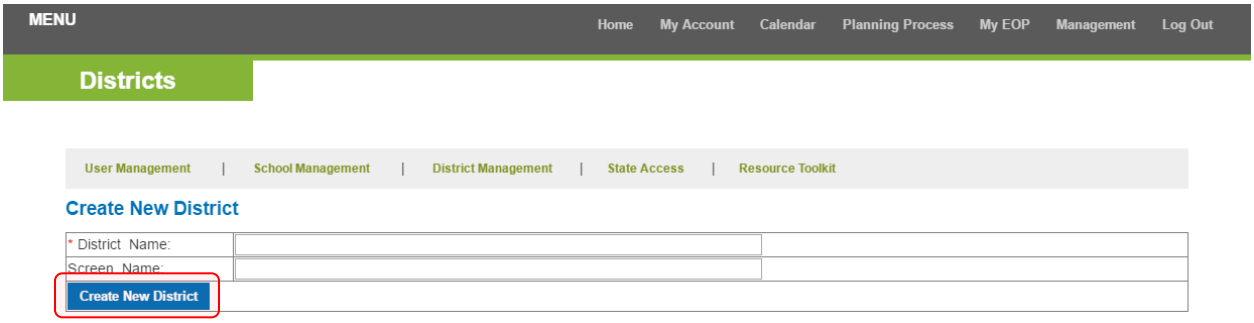
2. Click the **Create New District** button.



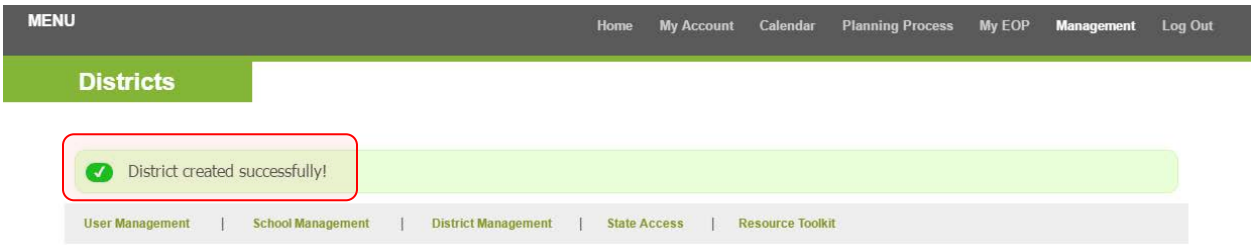
3. Fill all of the required fields (noted with an asterisk) in the form that appears.
   - Type the district's name in the District Name field.
   - Type the district's abbreviation in the Screen Name field.



4. Click the **Create New District** button.



5. The district profile information will save, the screen will return to the District List, and a confirmation message that a new district profile was created successfully will appear.

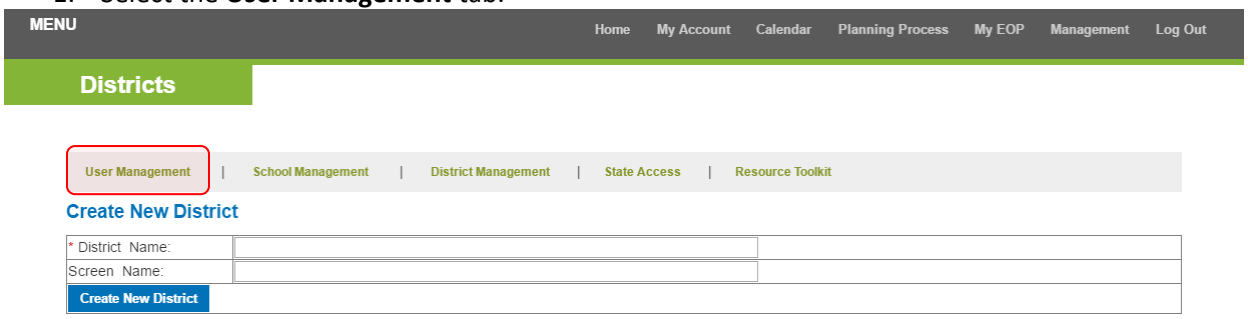


6. Repeat, as necessary, so that all of the districts in your state or region have a profile in the application.

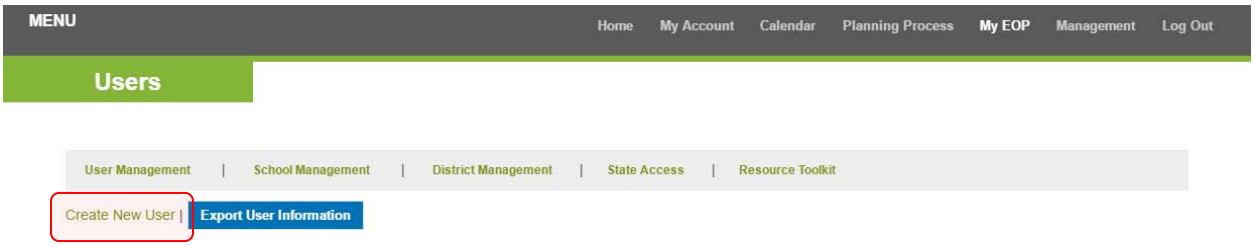
Create District Administrator Accounts

Although each district should have at least three District Administrator accounts, the State Administrator is only responsible for creating one District Administrator account for each district. It is important for you to create accounts for district personnel so that they can set up accounts for their schools and school personnel, review and contribute to school EOPs, collaborate on district emergency management planning efforts, and communicate district requirements. All personnel at the district level have the same permissions and will be assigned the District Administrator user role.

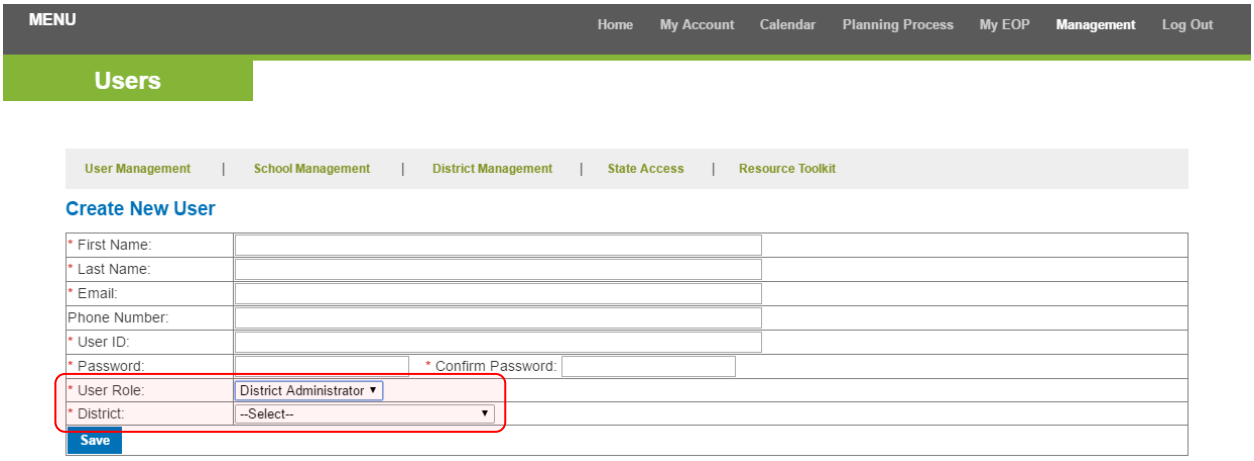
1. Select the **User Management** tab.



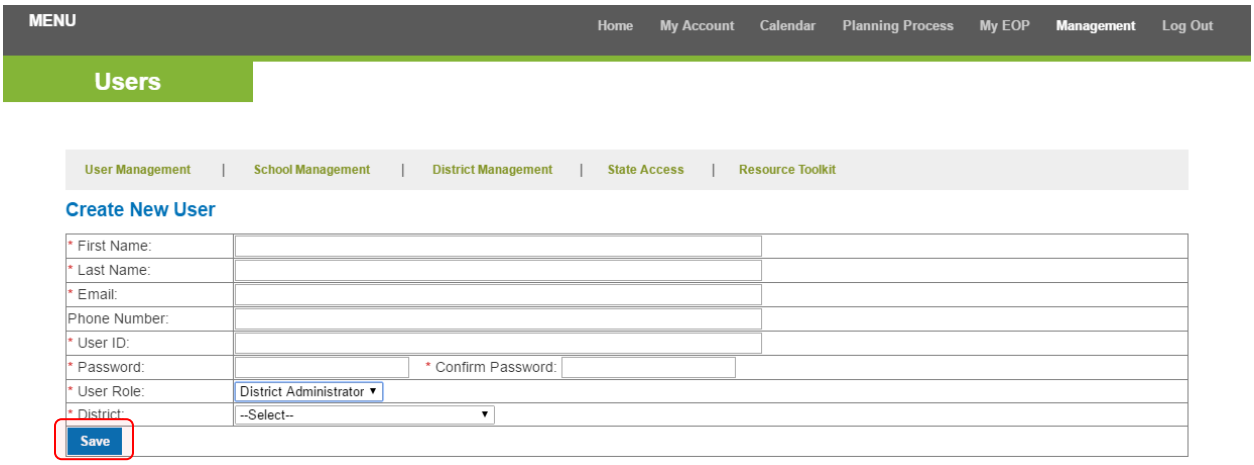
2. Click the **Create New User** button.



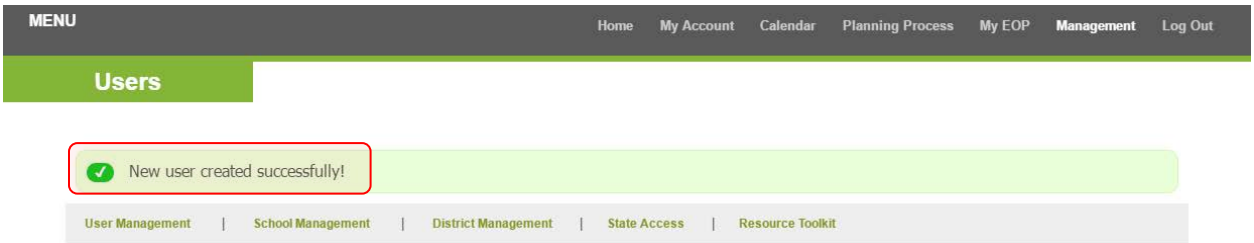
3. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **District Administrator** in the User Role dropdown menu.
   - Select the corresponding district name in the District dropdown menu.



4. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
5. Click the **Save** button.



6. The District Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



7. Repeat, as necessary, so that all of the district profiles have a District Administrator account assigned to them in the application. The REMS TA Center recommends that there are at least three District Administrator accounts for each district profile in EOP ASSIST, but State Administrators are only responsible for creating one user account per district profile.

Share Log-In Credentials With the District Administrators

It is important to share the newly created District Administrator accounts' log-in credentials with them, so that they can log in and use the application. The REMS TA Center recommends that you share all of the following information with each District Administrator:

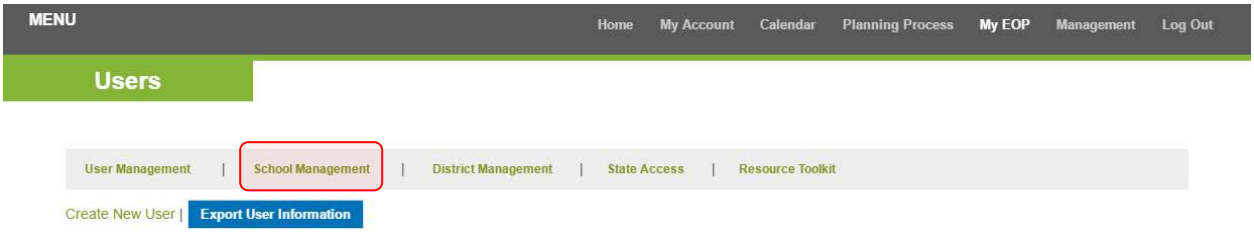
- User ID of the District Administrator account;
- Password of the District Administrator account;
- Reminder that the District Administrator may want to change his or her Password;
- Responsibility of the District Administrator to create at least two additional District Administrator accounts;

- Responsibility of the District Administrator to create a school profile and a School Administrator account for each school within their jurisdiction;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

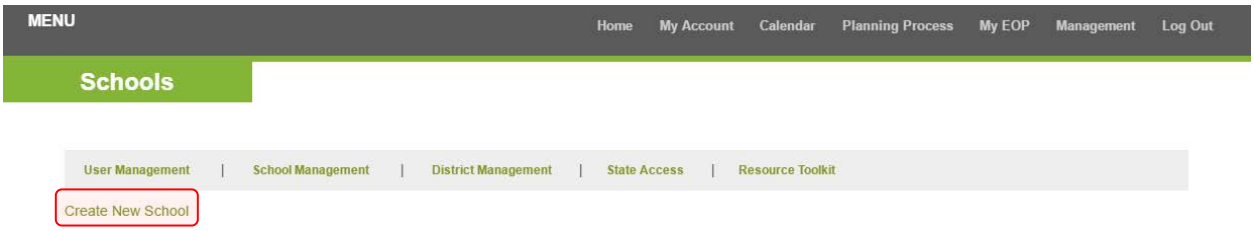
Create Independent School Profiles

You will need to create a profile for each independent school within your state, so that they can use the application to support their school emergency management planning efforts and have access to the appropriate information. Independent school profiles are not associated with any district profiles.

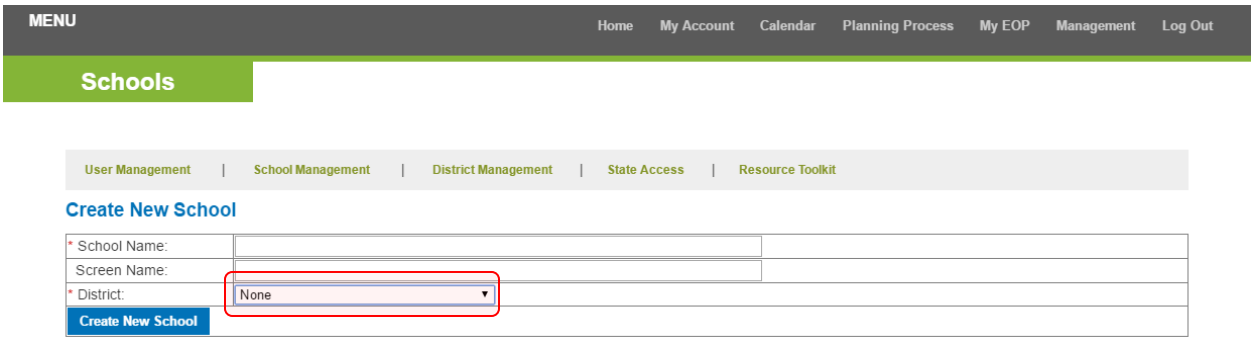
1. Select the **School Management** tab.



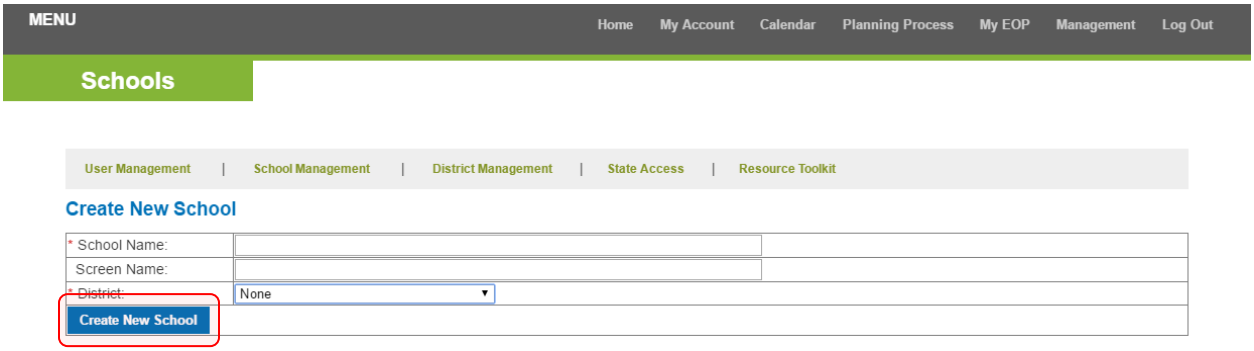
2. Click the **Create New School** button.



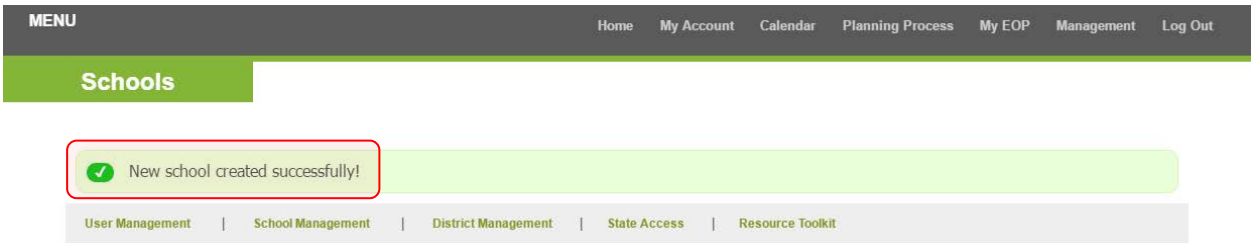
3. Fill all of the required fields (noted with an asterisk) in the form that appears.
   - Type the school's name in the School Name field.
   - Type the school's abbreviation in the Screen Name field.
   - Select **None** in the District dropdown menu.



4. Click the **Create New School** Button.



5. The school profile information will save, the screen will return to the School List, and a confirmation message that a new school profile was created successfully will appear.

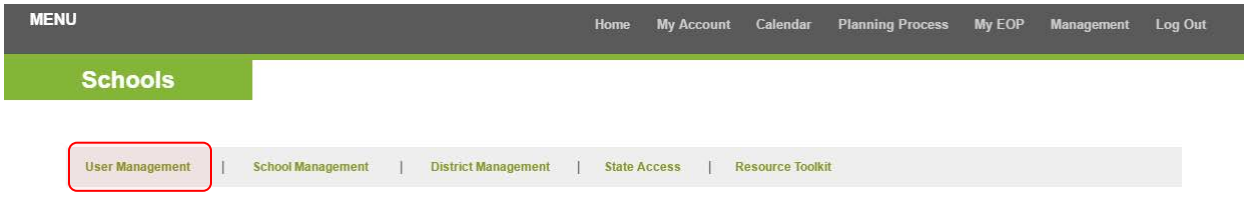


6. Repeat, as necessary, so that all of the independent schools in your state or region have a school profile in the application.

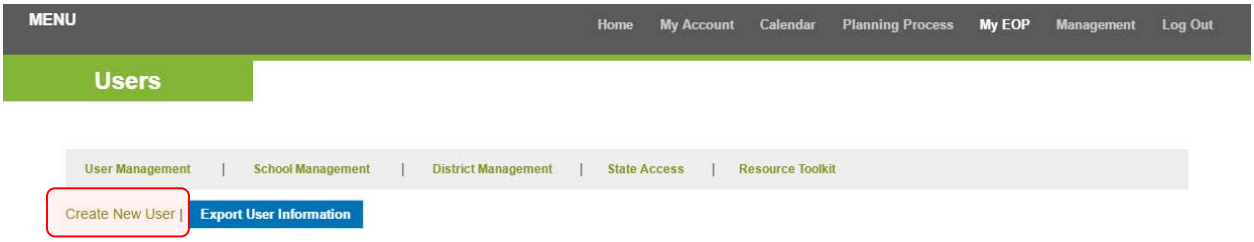
Create School Administrator Accounts

Although each school profile should have at least three School Administrator accounts, the State Administrator is only responsible for creating one School Administrator account for each independent school profile. It is important for you to create accounts for independent school personnel so that they can develop and revise their school EOPs and collaborate on school emergency management planning efforts. There are two user roles at the school level, but you will only be responsible for creating School Administrator accounts.

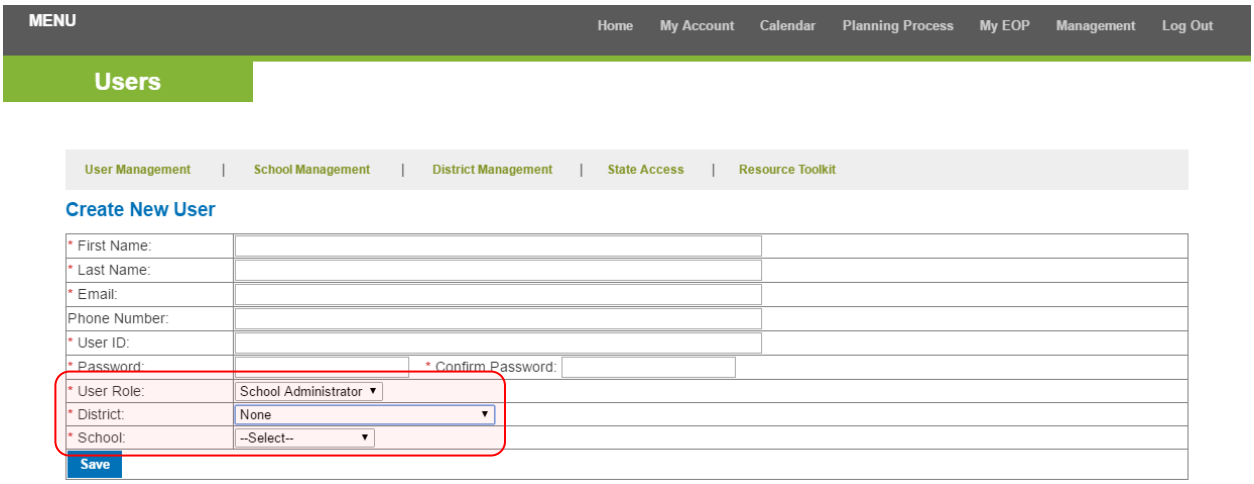
1. Select the **User Management** tab.



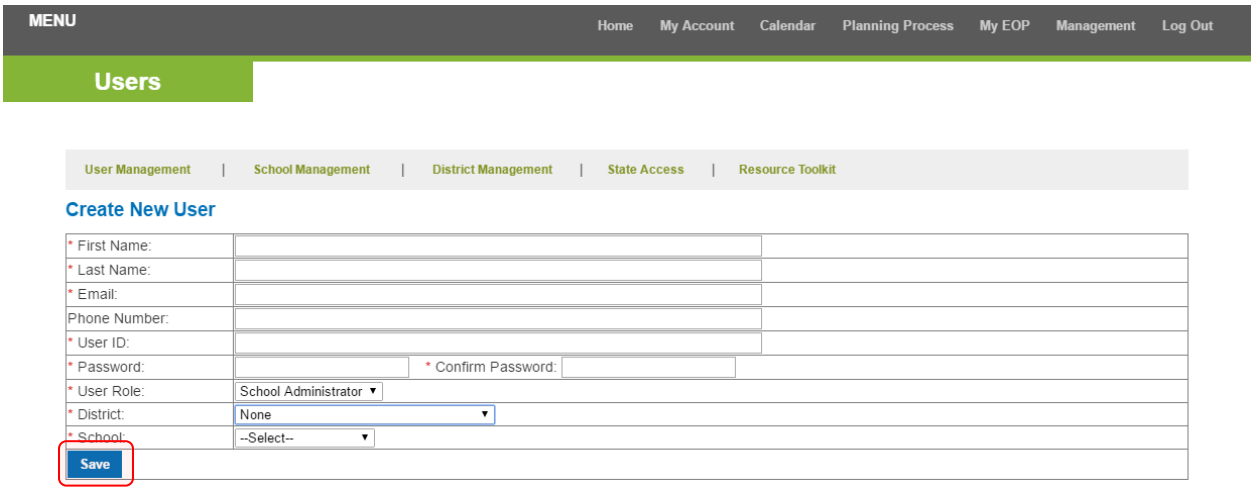
2. Click the **Create New User** button.



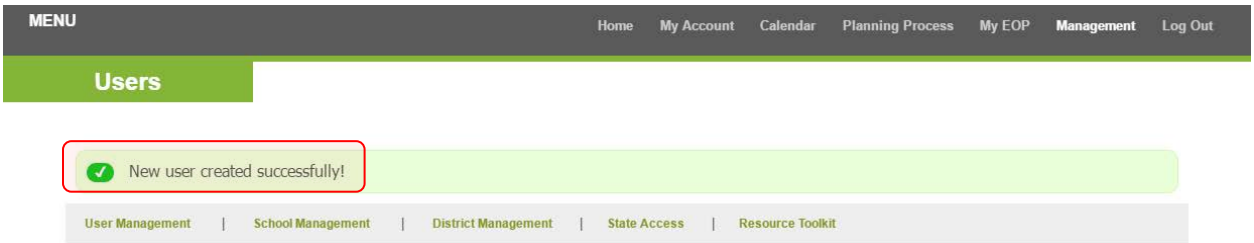
3. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **School Administrator** in the User Role dropdown menu.
   - Select **None** in the District dropdown menu.
   - Select the corresponding school name in the School dropdown menu.



4. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
5. Click the **Save** button.



6. The School Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



7. Repeat, as necessary, so that all of the independent school profiles in your state or region have a School Administrator account assigned to them in the application. The REMS TA Center recommends that there are at least three School Administrator accounts for each school profile in EOP ASSIST, but State Administrators are only responsible for creating one user account per independent school profile.

Share Log-In Credentials With the School Administrators

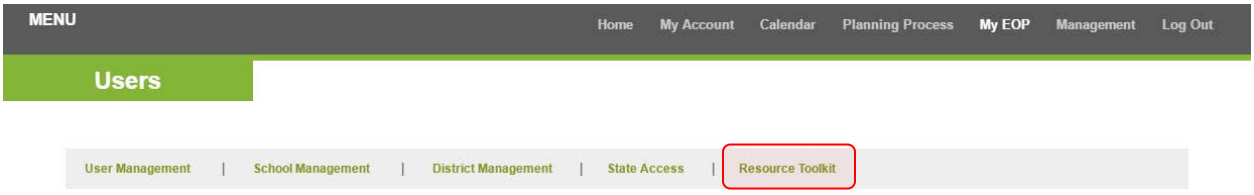
It is important to share the newly created School Administrator accounts' log-in credentials with him or her so that he or she can log in and use the application. The REMS TA Center recommends that you share all of the following information with each School Administrator:

- User ID of the School Administrator account;
- Password of the School Administrator account;
- Reminder that the School Administrator may want to change his or her Password;
- Responsibility of the School Administrator to create at least two additional School Administrator accounts;
- Responsibility of the School Administrator to create a School User account for each member of the school's planning team;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

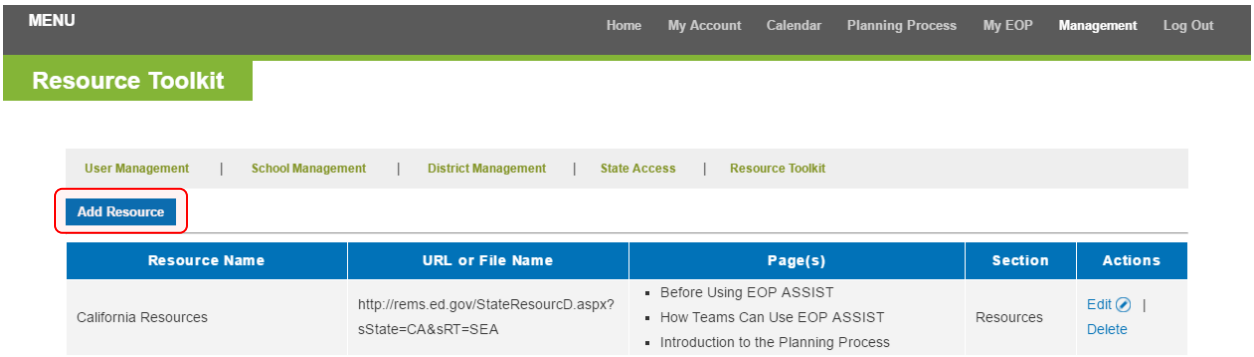
Add State-Specific Resources to the Resource Toolkit

EOP ASSIST 3.0 allows institutions to upload resources that are specific to their state, region, or district to the Resource Toolkit. State Administrators may add emergency management planning resources or guidance that are relevant for all schools within your state or region, and choose the location of each resource. Resources may be uploaded as files or URLs, and have the capability to be present on multiple pages within the application.

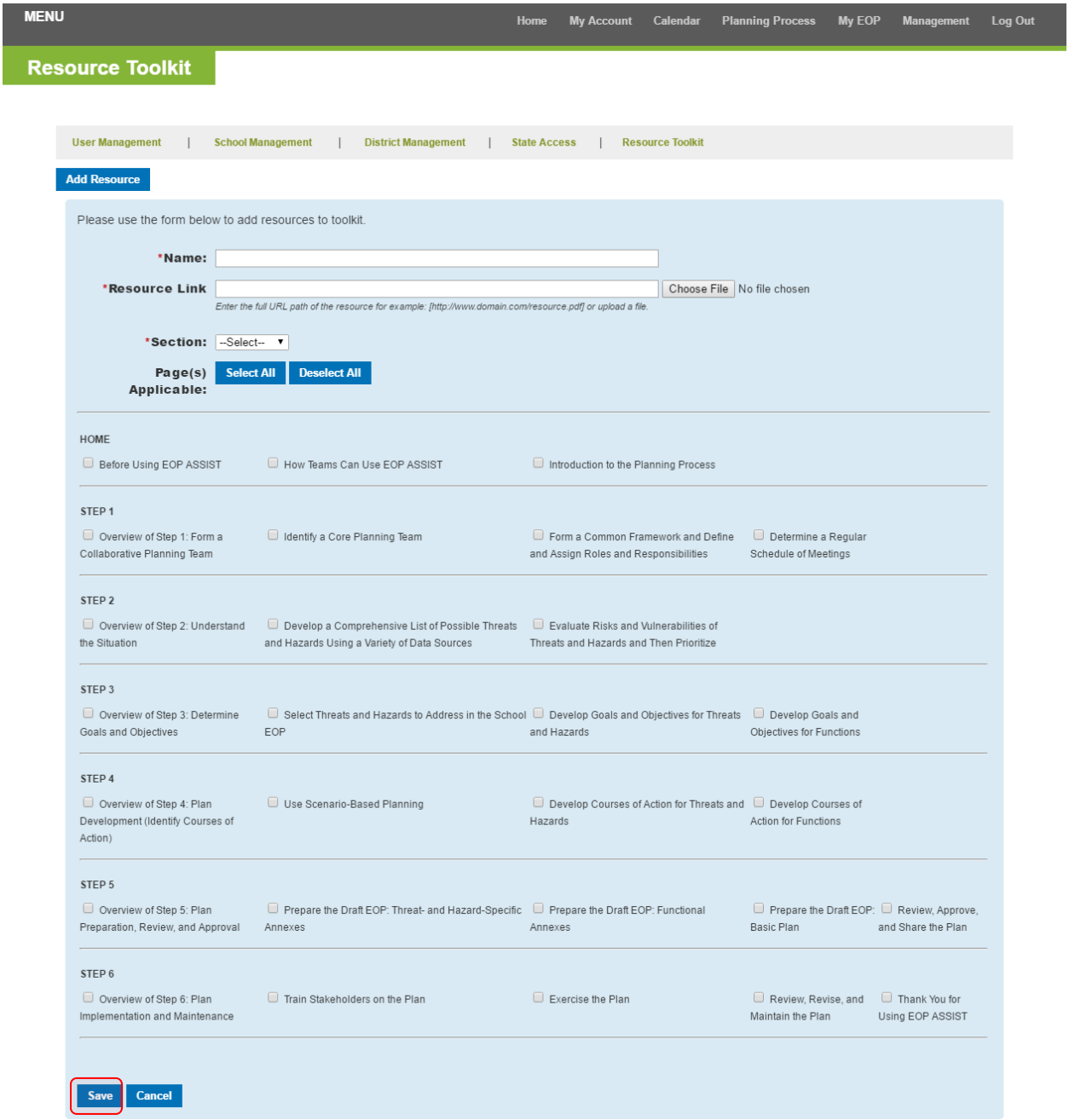
1. Select the **Resource Toolkit** tab.



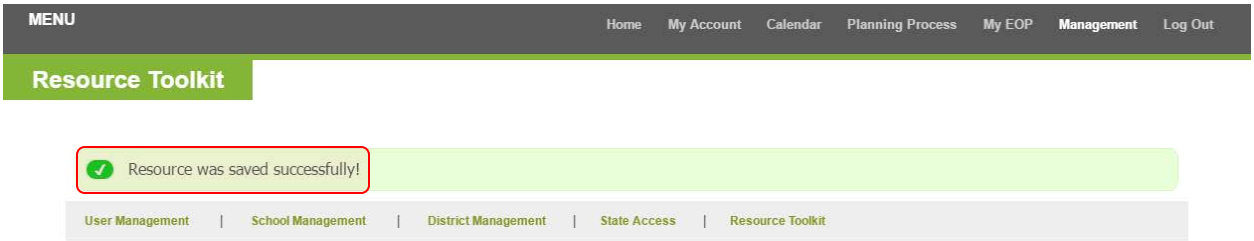
2. Click the **Add Resource** button.



3. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Type the name of the resource in the Name field. This is the text that will be displayed in the Resource Toolkit.
    - Type the URL of the resource or click the **Choose File** button, if the resource does not have a URL.
    - Select the appropriate label in the Section dropdown menu. This is the section of the Resource Toolkit that the resource will appear.
        i. **Guidance**—recommendations and laws from government agencies and other organizations on school emergency management planning.
        ii. **Resources**—tools, documents, online courses, and training materials that provide supplemental information on specific topics.
        iii. **Examples**—tangible result and product of emergency management planning work (e.g., sample goals and objectives, sample courses of action, sample annexes).
    - Select the check boxes for the applicable pages within the Planning Process section that are relevant to the resources. These are the pages where the resources will appear in the Resource Toolkit.
4. Click the **Save** button.

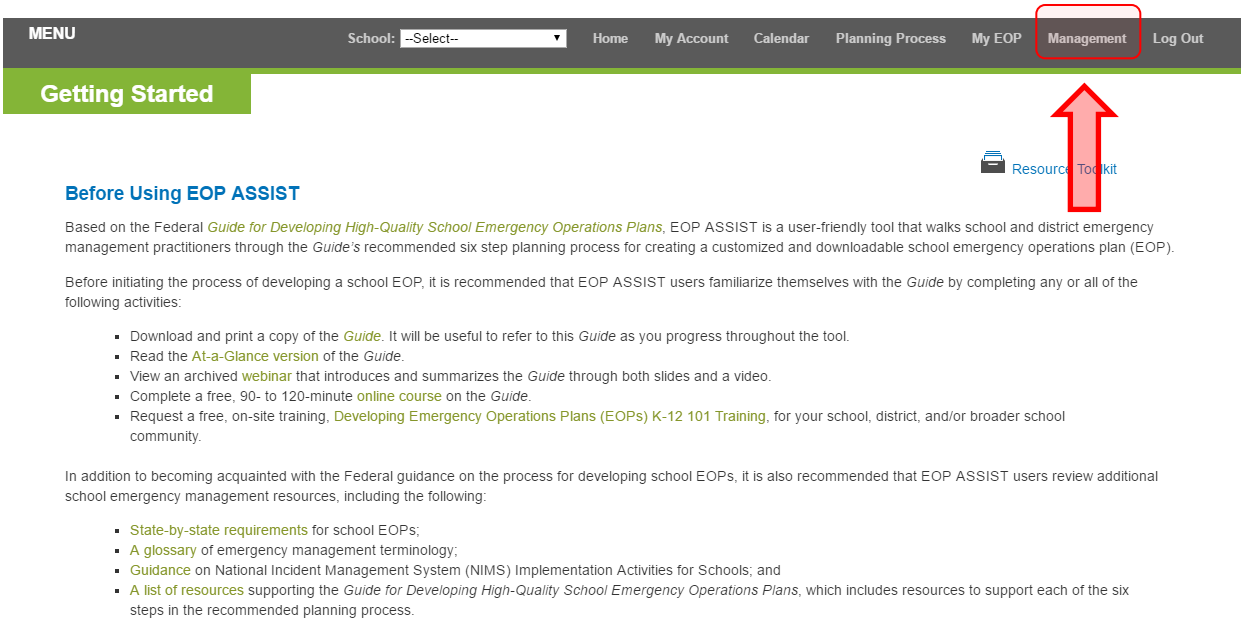

MENU
Home
My Account
Calendar
Planning Process
My EOP
Management
Log Out
Resource Toolkit
User Management | School Management | District Management | State Access | Resource Toolkit
Add Resource
Please use the form below to add resources to toolkit.
*Name:
*Resource Link
Choose File
No file chosen
Enter the full URL path of the resource for example: [http://www.domain.com/resource.pdf] or upload a file.
*Section:
--Select--
Page(s) Applicable:
Select All
Deselect All
HOME
Before Using EOP ASSIST
How Teams Can Use EOP ASSIST
Introduction to the Planning Process
STEP 1
Overview of Step 1: Form a Collaborative Planning Team
Identify a Core Planning Team
Form a Common Framework and Define and Assign Roles and Responsibilities
Determine a Regular Schedule of Meetings
STEP 2
Overview of Step 2: Understand the Situation
Develop a Comprehensive List of Possible Threats and Hazards Using a Variety of Data Sources
Evaluate Risks and Vulnerabilities of Threats and Hazards and Then Prioritize
STEP 3
Overview of Step 3: Determine Goals and Objectives
Select Threats and Hazards to Address in the School EOP
Develop Goals and Objectives for Threats and Hazards
Develop Goals and Objectives for Functions
STEP 4
Overview of Step 4: Plan Development (Identify Courses of Action)
Use Scenario-Based Planning
Develop Courses of Action for Threats and Hazards
Develop Courses of Action for Functions
STEP 5
Overview of Step 5: Plan Preparation, Review, and Approval
Prepare the Draft EOP: Threat- and Hazard-Specific Annexes
Prepare the Draft EOP: Functional Annexes
Prepare the Draft EOP: Basic Plan
Review, Approve, and Share the Plan
STEP 6
Overview of Step 6: Plan Implementation and Maintenance
Train Stakeholders on the Plan
Exercise the Plan
Review, Revise, and Maintain the Plan
Thank You for Using EOP ASSIST
Save
Cancel

5. The Resource information will save, the screen will return to the Resource Toolkit list, and a confirmation message that a new resource was saved successfully will appear.



District Administrator Responsibilities

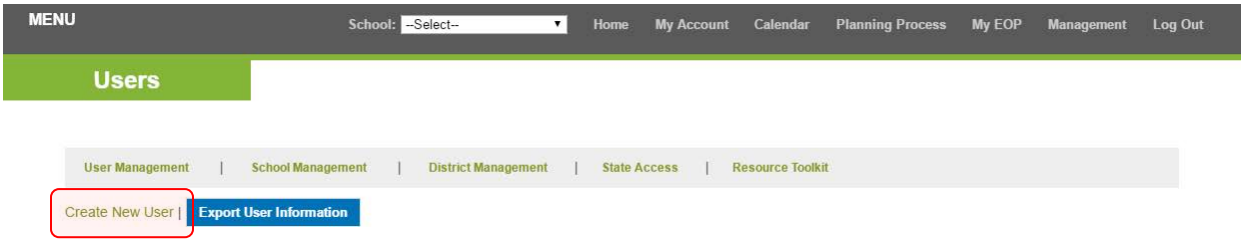
As a District Administrator, you will need to create additional District Administrator accounts, school profiles, and at least one School Administrator account per school profile. To begin, sign in to the application using the log-in credentials provided by the State Administrator and navigate to the Management section.



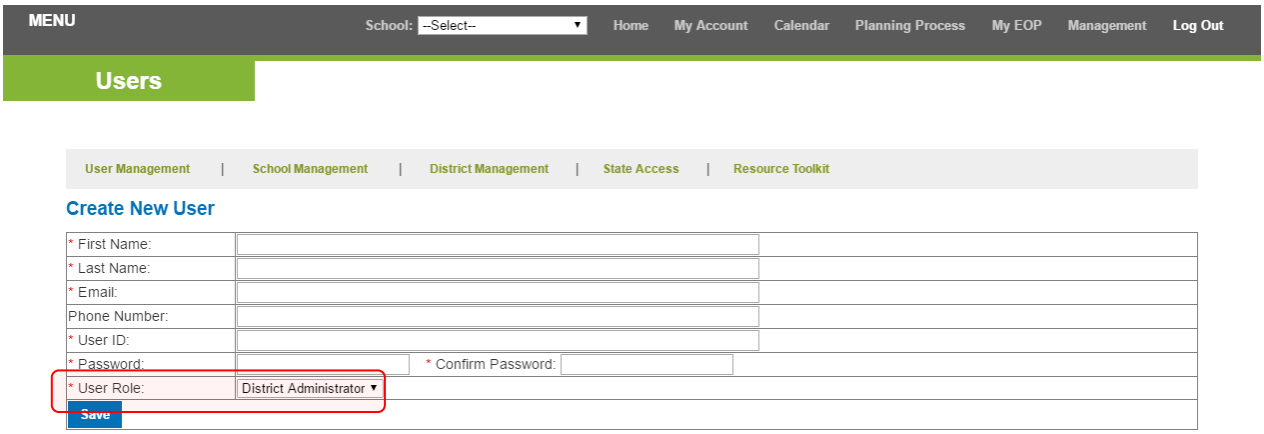
Create District Administrator Accounts

It is important for you to create accounts for your colleagues with a role in school emergency management planning at the district level, so that the appropriate parties have access to the application to contribute to and review school EOPs, collaborate on district-wide emergency management planning efforts, and communicate district requirements. All personnel at the district level have the same permissions and will be assigned the District Administrator user role. So, the additional District Administrators have the capability to help you create school profiles and School Administrator accounts for each of those school profiles, which are described in the subsequent subsections.

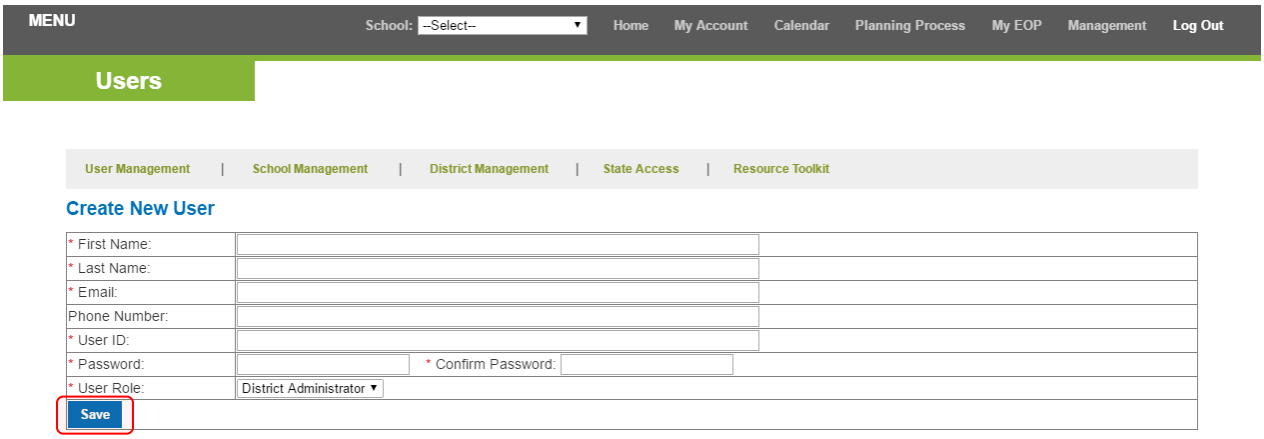
1. Click the **Create New User** button.



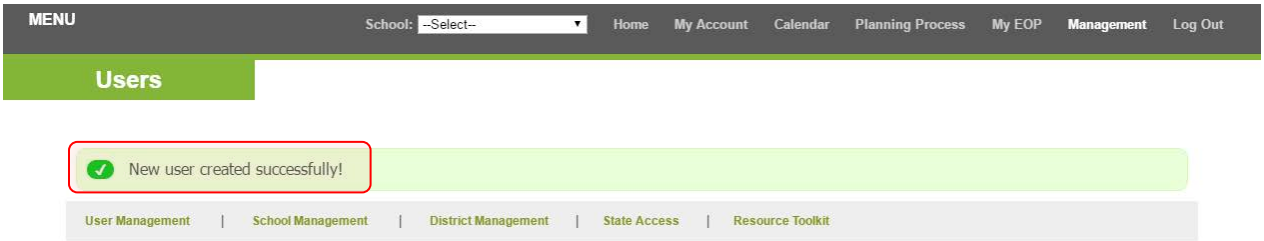
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
    - Select **District Administrator** in the User Role dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The District Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate district personnel with a role in school emergency management planning have an account in the application. The REMS TA Center recommends that there are at least three District Administrator accounts for each district profile in EOP ASSIST.

Share Log-In Credentials With the District Administrators

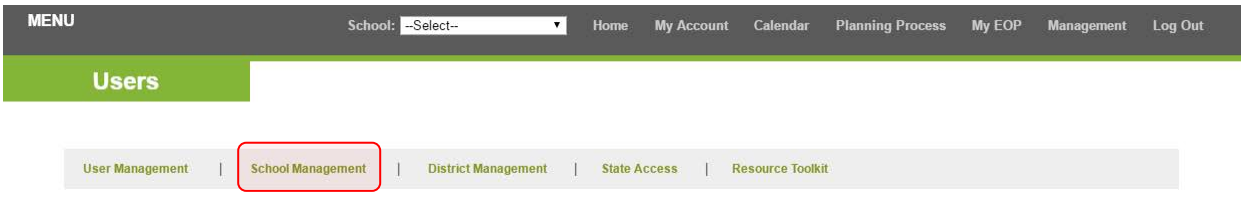
It is important to share the newly created District Administrator accounts' log-in credentials with him or her, so that he or she can log in and use the application. He or she may also help you fulfill your remaining responsibilities, since he or she has the same permissions as you. The REMS TA Center recommends that you share all of the following information with each District Administrator:

- User ID of the District Administrator account;
- Password of the District Administrator account;
- Reminder that the District Administrator may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

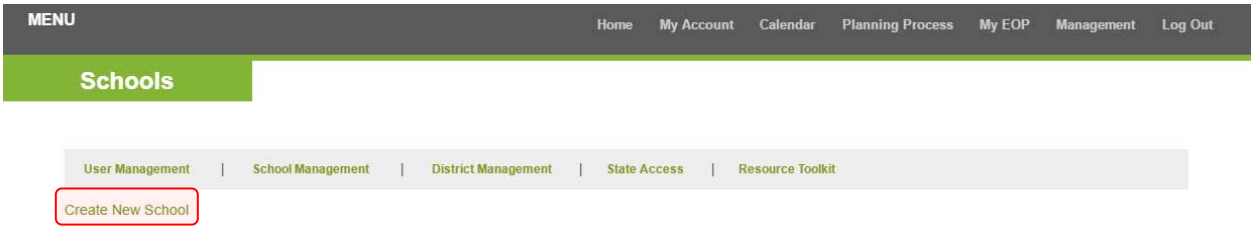
Create School Profiles

You will need to create a profile for each school within your district so that they can use the application to support their school emergency management planning efforts and have access to the appropriate information. School profiles allow school personnel to manage and oversee their school EOP.

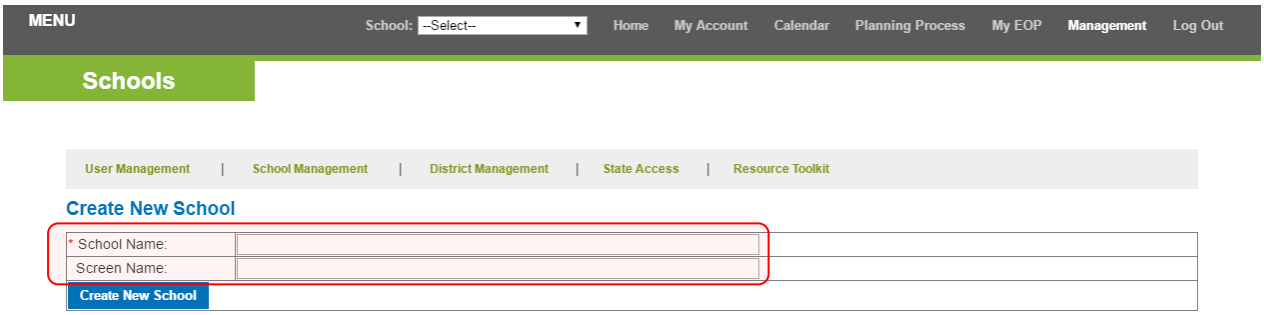
1. Select the **School Management** tab.



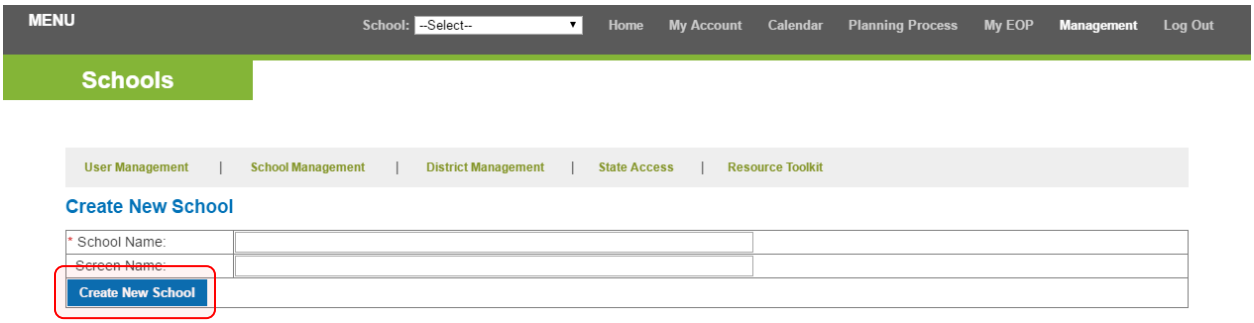
2. Click the **Create New School** button.



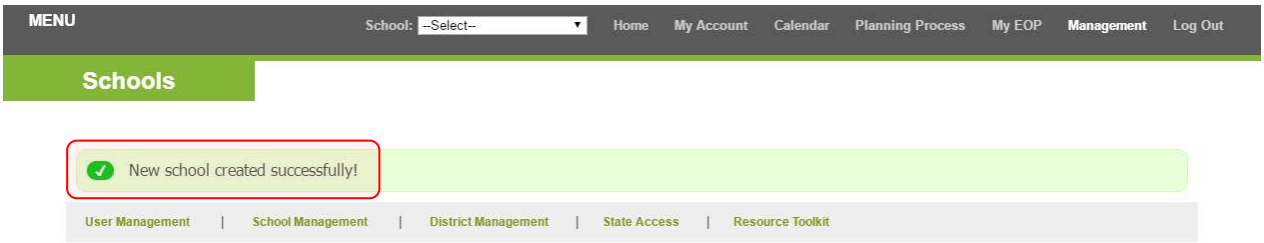
3. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Type the school's name in the School Name field.
    - Type the school's abbreviation in the Screen Name field.



4. Click the **Create New School** button.



5. The school profile information will save, the screen will return to the School List, and a confirmation message that a new school profile was created successfully will appear.

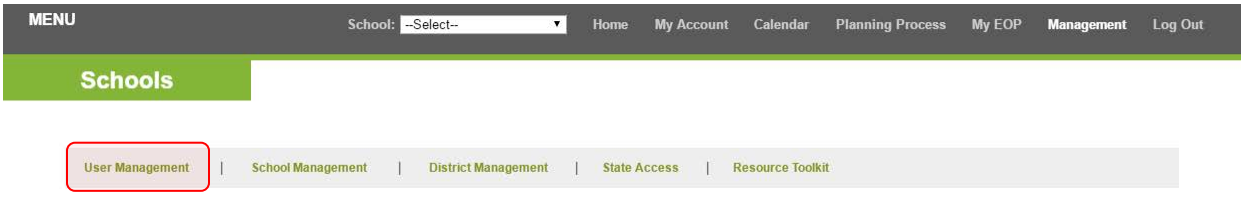


6. Repeat, as necessary, so that all of the schools in your district have a profile in the application.

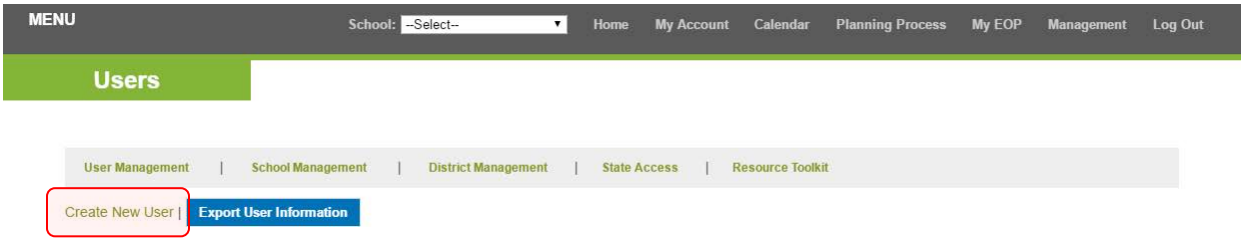
Create School Administrator Accounts

Although each school profile should have at least three School Administrator accounts, the District Administrator is only responsible for creating one School Administrator account for each school profile. It is important for you to create user accounts for school personnel so that they can develop and revise their school EOPs and collaborate on school emergency management planning efforts. There are two user roles at the school level, but you will only be responsible for creating School Administrator accounts.

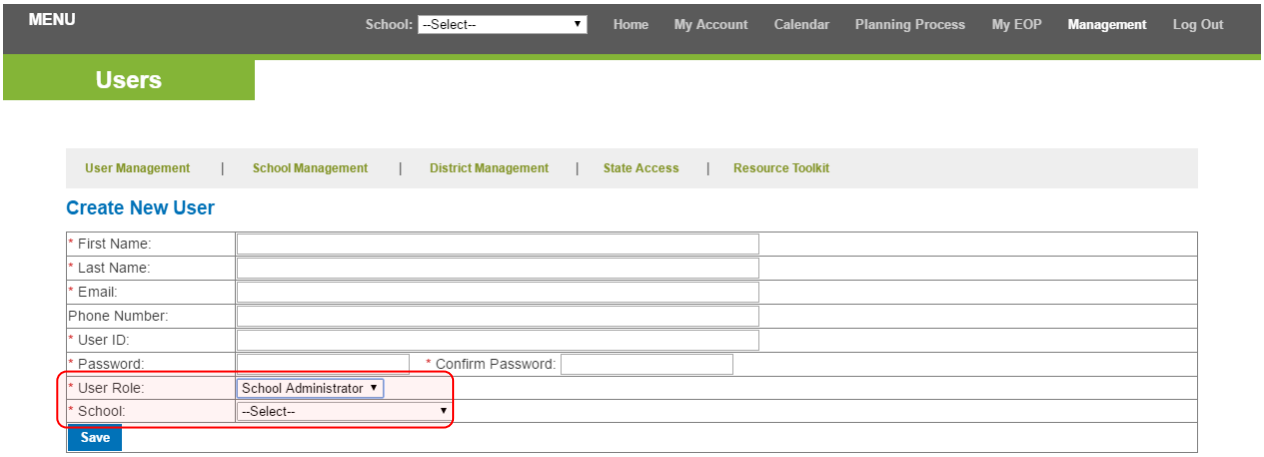
1. Select the **User Management** tab.



2. Click the **Create New User** button.

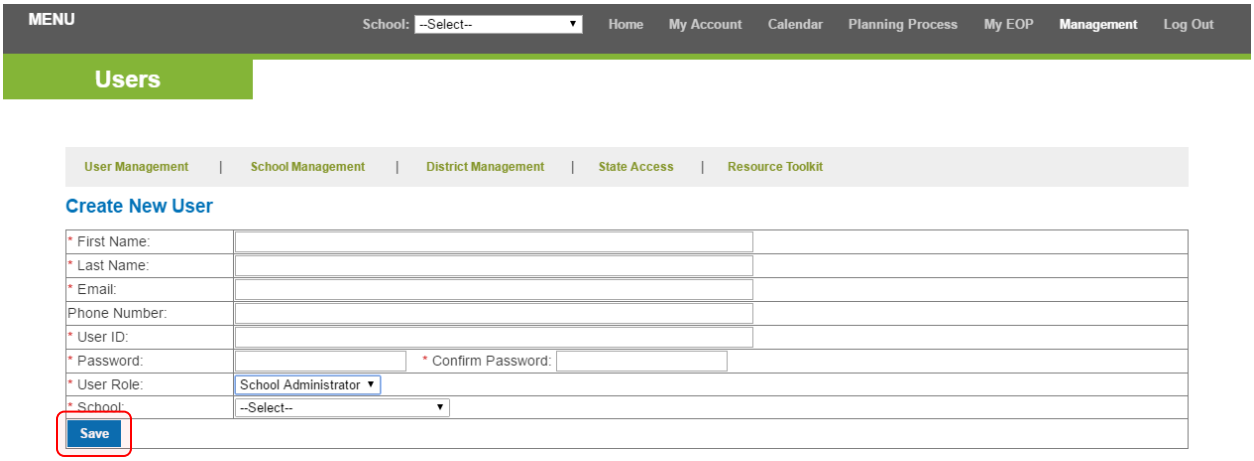


3. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **School Administrator** in the User Role dropdown menu.
   - Select the corresponding school name in the School dropdown menu.

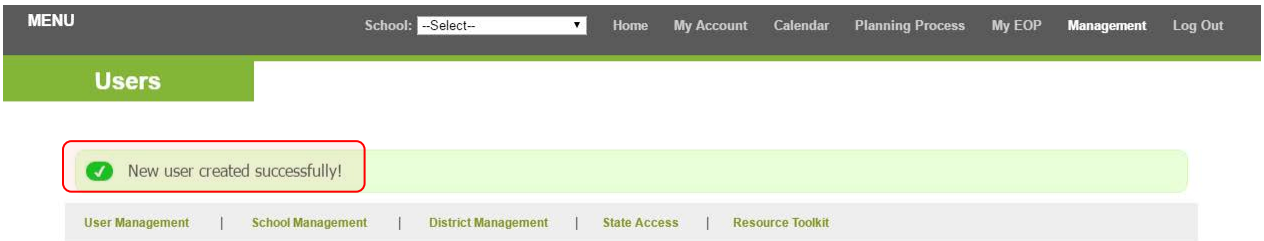


4. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.

5. Click the **Save** button.



6. The School Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



7. Repeat, as necessary, so that all of the school profiles in your district have a School Administrator account assigned to them in the application. The REMS TA Center recommends that there are at least three School Administrator accounts for each school profile in EOP ASSIST, but District Administrators are only responsible for creating one user account per school profile.

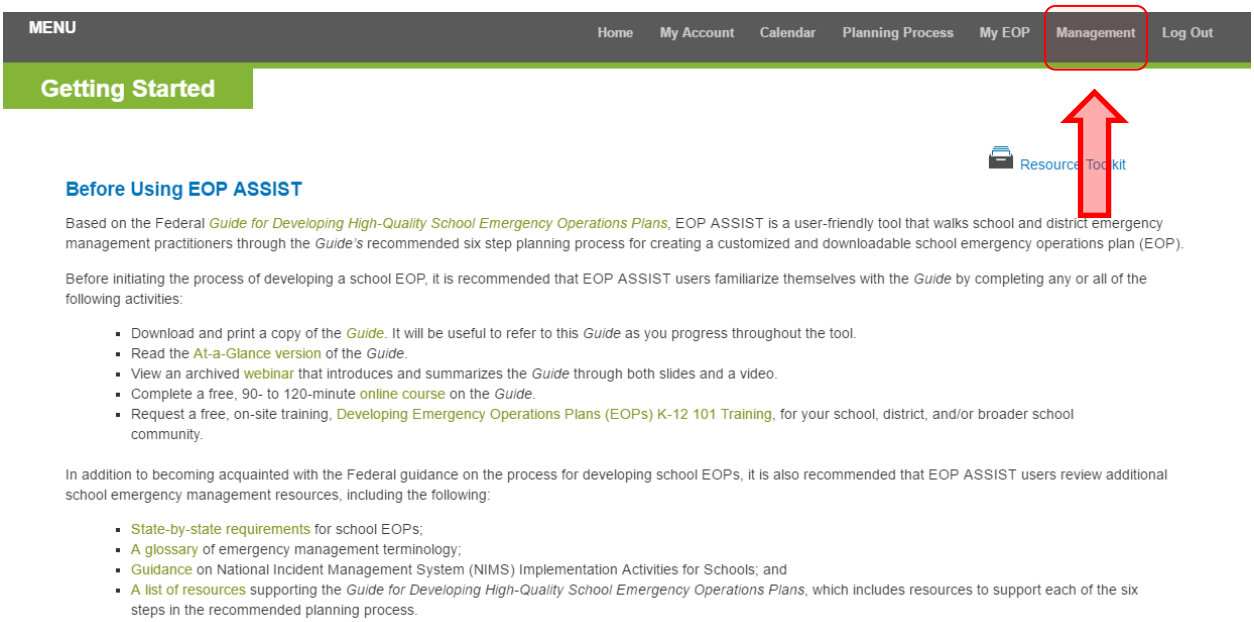
Share Log-In Credentials With the School Administrators

It is important to share the newly created School Administrator accounts' log-in credentials with him or her, so that he or she can log in and use the application. The REMS TA Center recommends that you share all of the following information with each School Administrator:

- User ID of the School Administrator account;
- Password of the School Administrator account;
- Reminder that the School Administrator may want to change his or her Password;
- Responsibility of the School Administrator to create at least two additional School Administrator accounts;
- Responsibility of the School Administrator to create a School User account for each member of the school's planning team;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

School Administrator Responsibilities

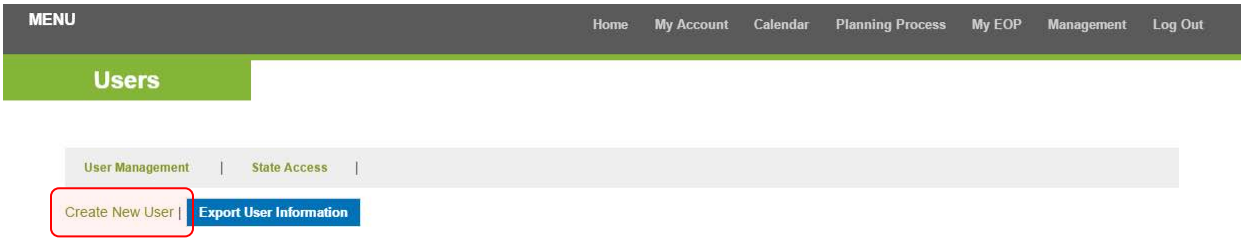
As a School Administrator, you will need to create additional School Administrator accounts and School User accounts. To begin, sign in to the application using the log-in credentials provided by the State Administrator and navigate to the Management section.



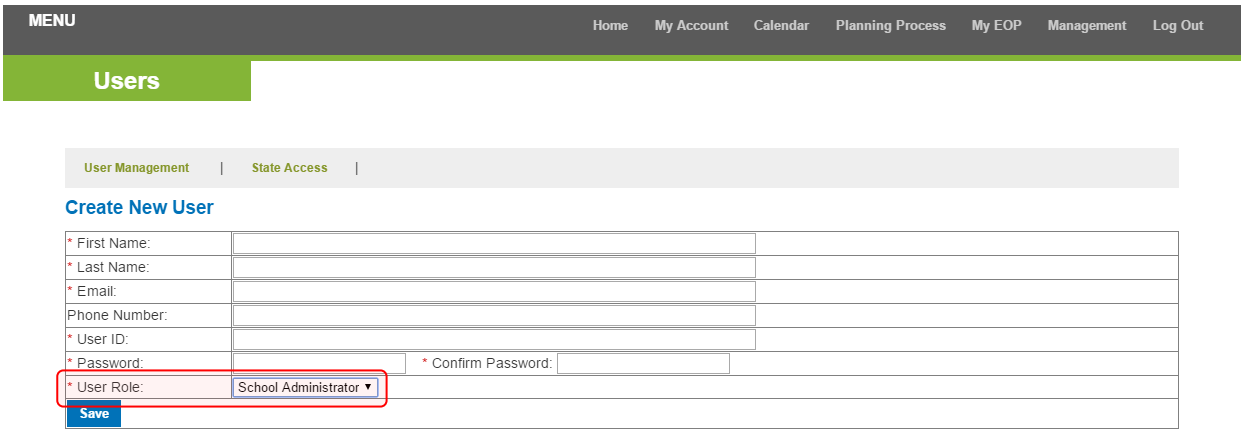
Create School Administrator Accounts

It is important for you to create accounts for your colleagues with a leadership role in school emergency management planning, so that the appropriate parties have access to the application to contribute to and review school EOPs and collaborate on school emergency management planning efforts. All School Administrators have the same permissions and, therefore, have the ability to help you create additional School Administrator and School User accounts, which are described in the subsequent subsections.

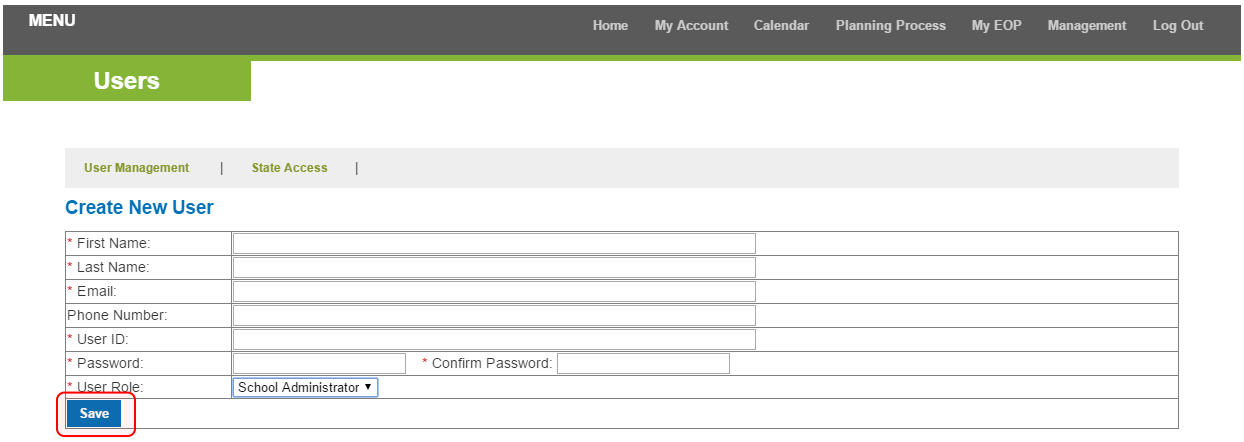
1. Click the **Create New User** button.



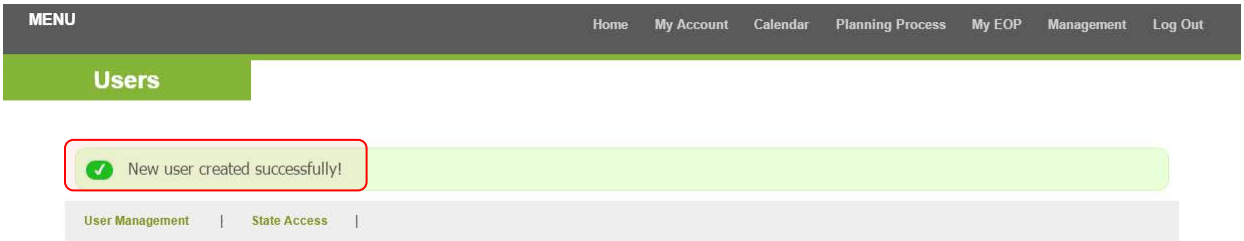
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
    - Select **School Administrator** in the User Role dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The School Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate personnel with a leadership role in school emergency management planning have an account in the application. The REMS TA Center recommends that there are at least three School Administrator accounts for each school profile in EOP ASSIST.

Share Log-In Credentials With the School Administrators

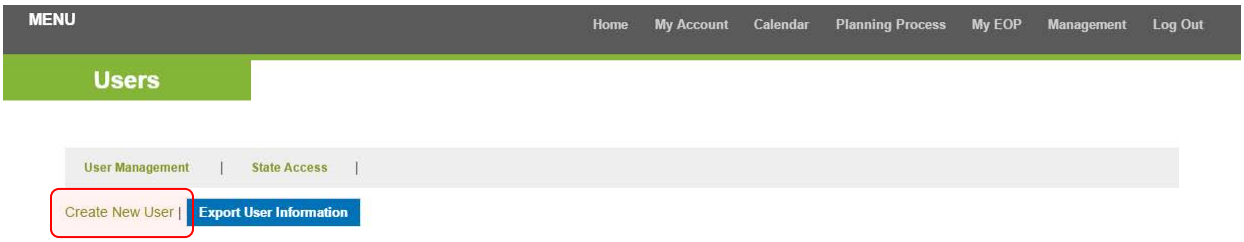
It is important to share the newly created School Administrator accounts' log-in credentials with him or her so that he or she can log in and use the application. He or she may also help you fulfill your remaining responsibilities, since he or she has the same permissions as you. The REMS TA Center recommends that you share all of the following information with each School Administrator:

- User ID of the School Administrator account;
- Password of the School Administrator account;
- Reminder that the School Administrator may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

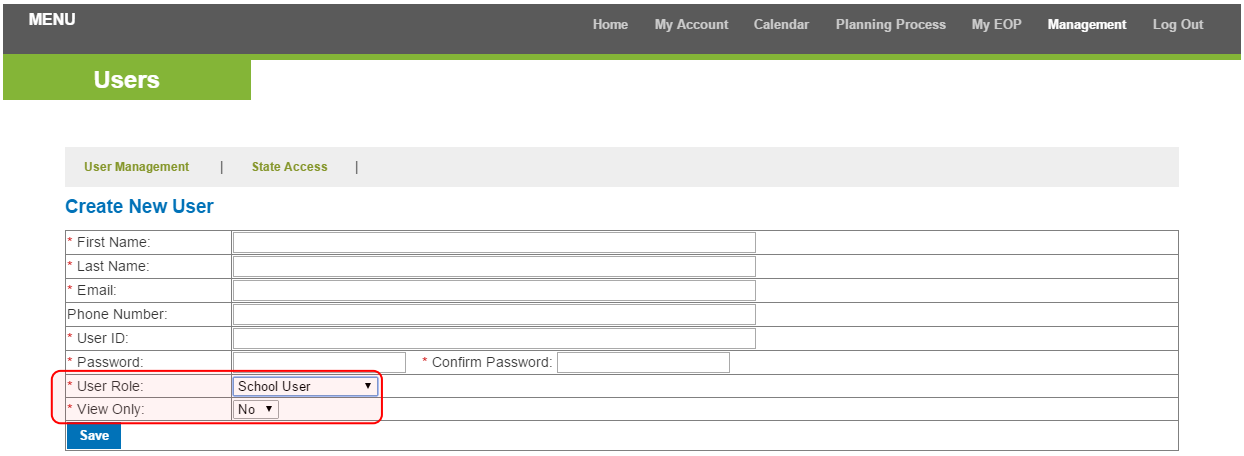
Create School User Accounts

It is also important for you to create accounts for the remaining members of the planning team, so that the appropriate parties have access to the application to contribute to school EOPs and collaborate on school emergency management planning efforts. Unlike School Administrators, School Users do not have any management responsibilities.

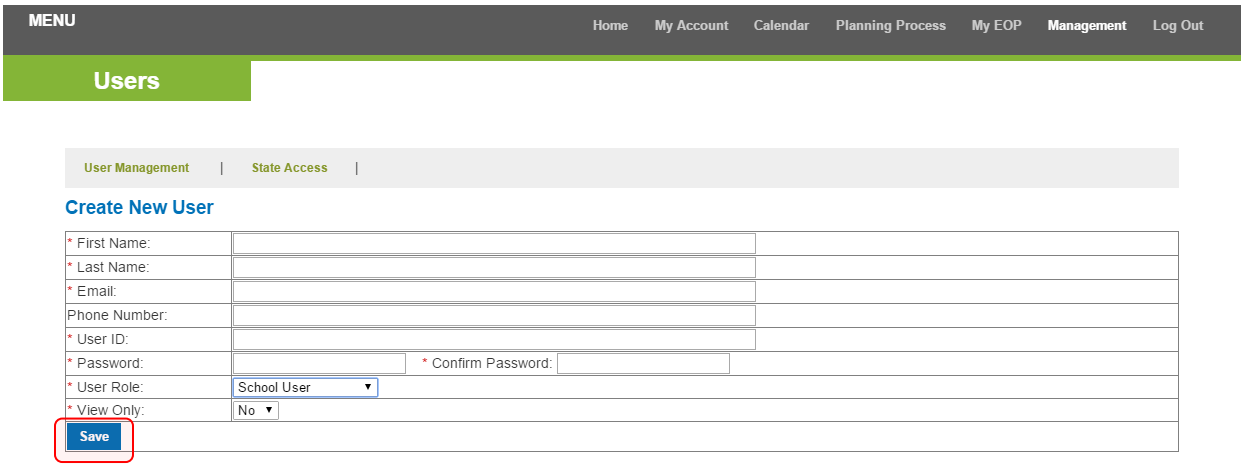
1. Click the **Create New User** button.



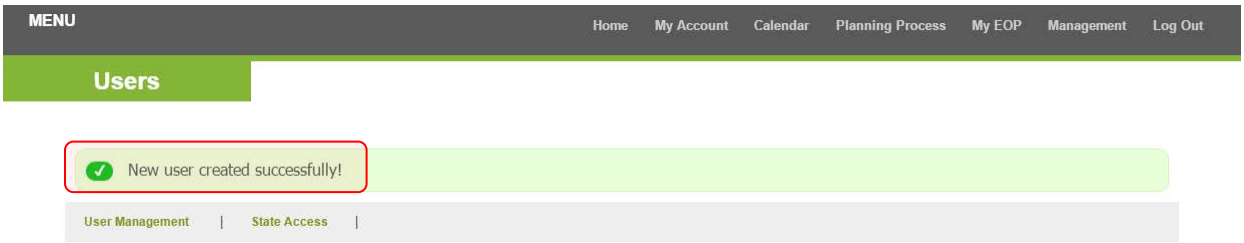
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
    - Select **School User** in the User Role dropdown menu.
    - Select **No** in the View Only dropdown menu, which will allow the School User to contribute to and edit the school EOP. In the few cases that the School User should only be granted viewing permissions, select Yes in the View Only dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The School User name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate personnel with a role in school emergency management planning have an account in the application.

Share Log-In Credentials With the School Users

It is important to share the newly created School User accounts' log-in credentials with him or her so that he or she can log in and use the application. The REMS TA Center recommends that you share all of the following information with each School User:

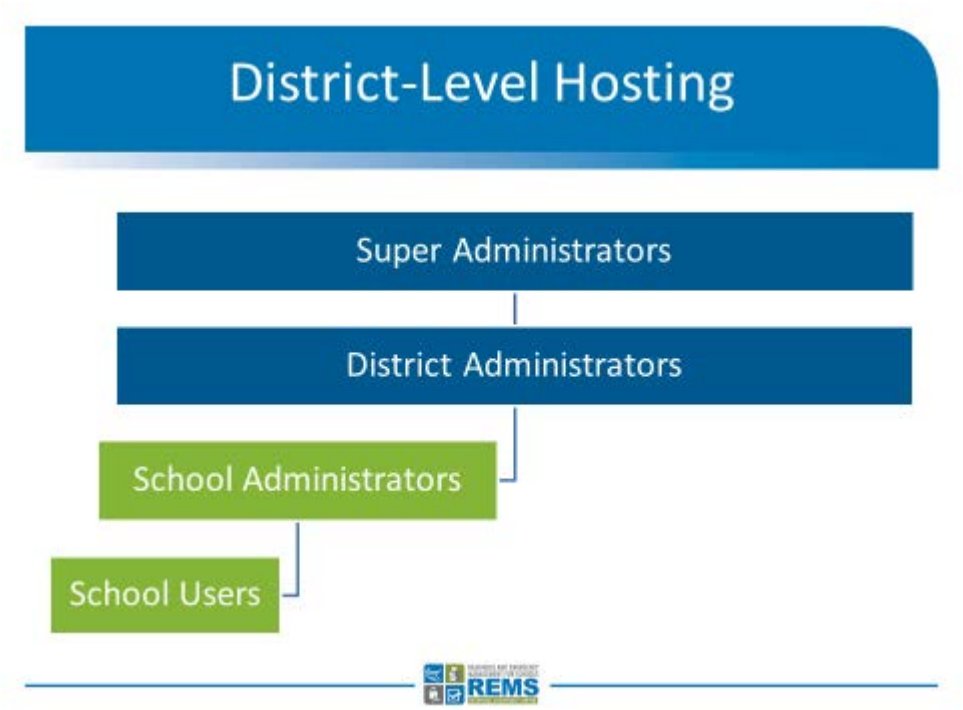
- User ID of the School User account;
- Password of the School User account;
- Reminder that the School User may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

School User Responsibilities

This is the user role of the majority of EOP ASSIST user accounts. You serve as a member of your school's planning team, but have no management responsibilities in the application. You may begin contributing to your school EOP, which is described in more detail in Chapter 5.

District-Level Hosting

This allows districts and their schools to have access to and different roles within the application. Typically, a district will host the application at this level so that all schools within their jurisdiction may log in to the application to develop and revise their school EOPs, which are stored on the district's server. Below is an image of the hierarchy of various user roles within EOP ASSIST in district-level hosting.



The Super Administrator should have already set up the district account, as outlined in the *EOP ASSIST 3.0 Installation Manual*, and created at least one District Administrator who is associated with the district. Once the District Administrator's log-in credentials are shared with him or her, the District Administrator is responsible for creating school profiles and user accounts, who will then grant access to subsequent levels. Below is an overview of the initial responsibilities of each user role available in district-level hosting.

- **Super Administrator**
  - Sets up the district account
  - Creates at least one District Administrator account
- **District Administrator**
  - Creates additional District Administrator accounts
  - Creates school profiles
    - Creates at least one School Administrator account per school profile
- **School Administrator**
  - Creates additional School Administrator accounts

- Creates School User accounts
- **School User**
  - No management responsibilities

Please refer to the following subsection that correlates with your user role in order to learn more about your responsibilities.

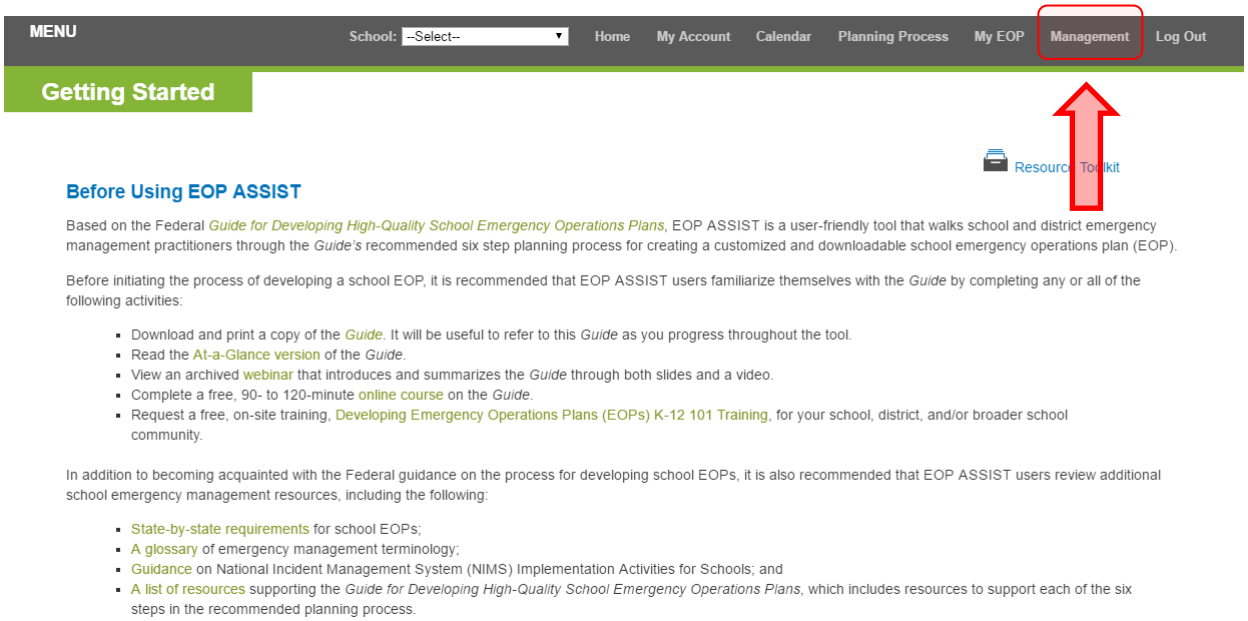
Super Administrator Responsibilities

Typically, the Super Administrator is IT personnel at the district hosting the application, and is a user role for which at least three individuals at the district should have access to the log-in credentials. The Super Administrator serves as the database manager and is responsible for installing EOP ASSIST 3.0. He or she also sets up the district's account, creates log-in credentials for at least one District Administrator, and shares the first District Administrator's log-in credential with him or her. From this point on, the Super Administrator is responsible for managing the back-end database, as needed, and the Website through which the application is accessed by all users. The Super Administrator has access to all management features outlined in Chapter 6, and he or she can reset any user's password, upon request.

For instructions on how to set up the district's account and create a District Administrator, please refer to the *EOP ASSIST 3.0 Installation Manual.*

District Administrator Responsibilities

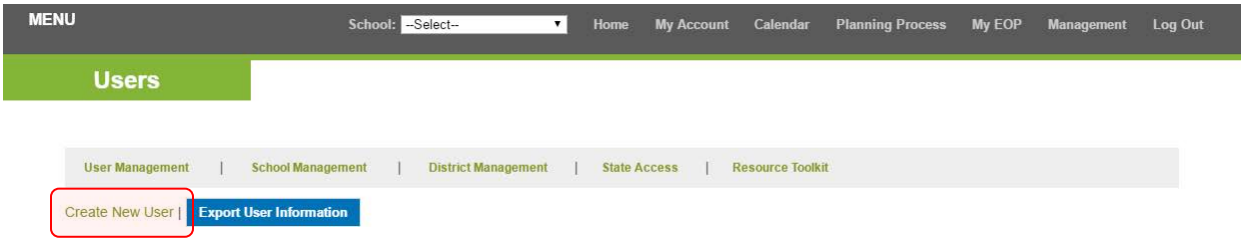
As a District Administrator, you will need to create additional District Administrator accounts, school profiles, and at least one School Administrator account per school profile. To begin, sign in to the application using the log-in credentials provided by the Super Administrator and navigate to the Management section.



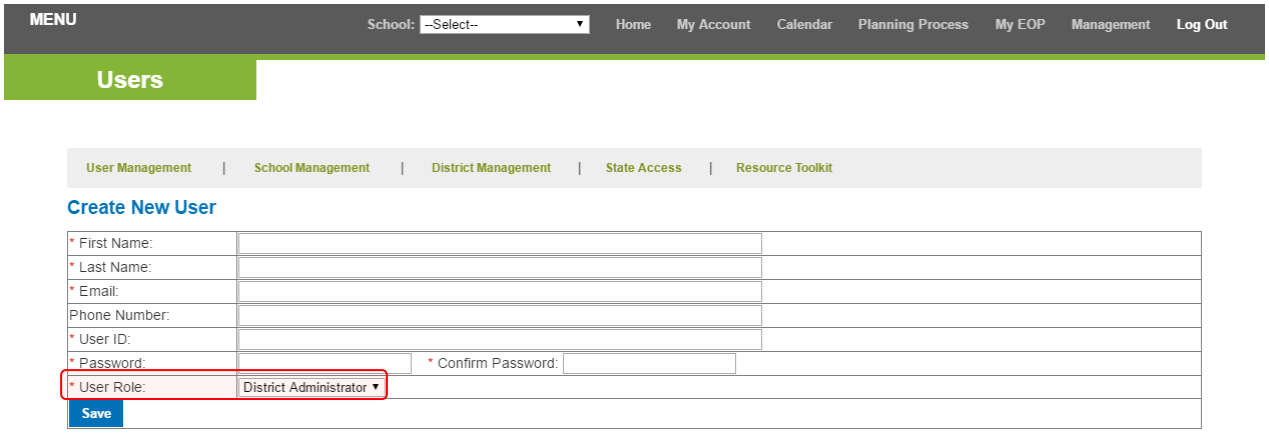
Create District Administrator Accounts

It is important for you to create accounts for your colleagues with a role in school emergency management planning at the district level, so that the appropriate parties have access to the application to contribute to and review school EOPs, collaborate on district-wide emergency management planning efforts, and communicate district requirements. All personnel at the district level have the same permissions and will be assigned the District Administrator user role. So, the additional District Administrators have the capability to help you create school profiles and School Administrator accounts for each of those school profiles, which are described in the subsequent subsections.

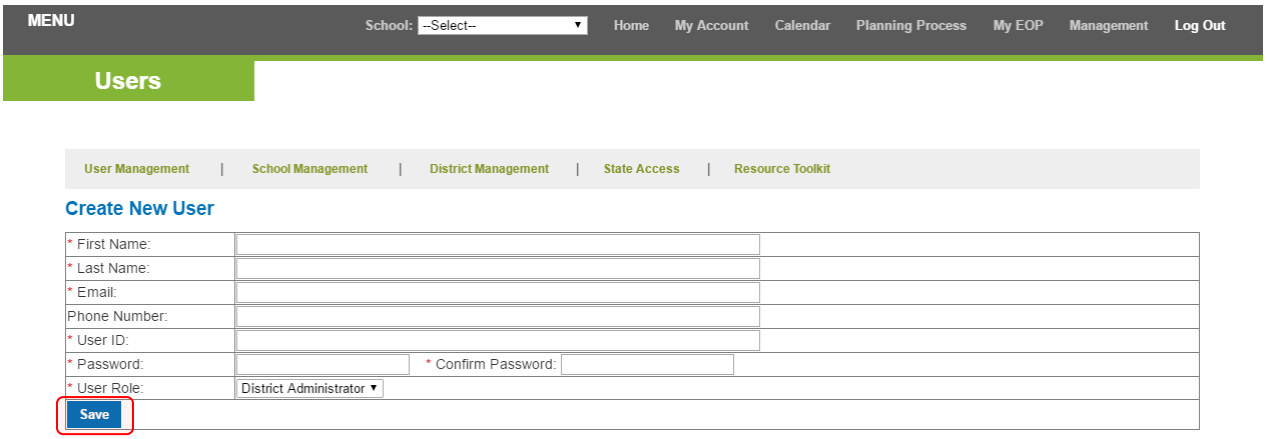
1. Click the **Create New User** button.



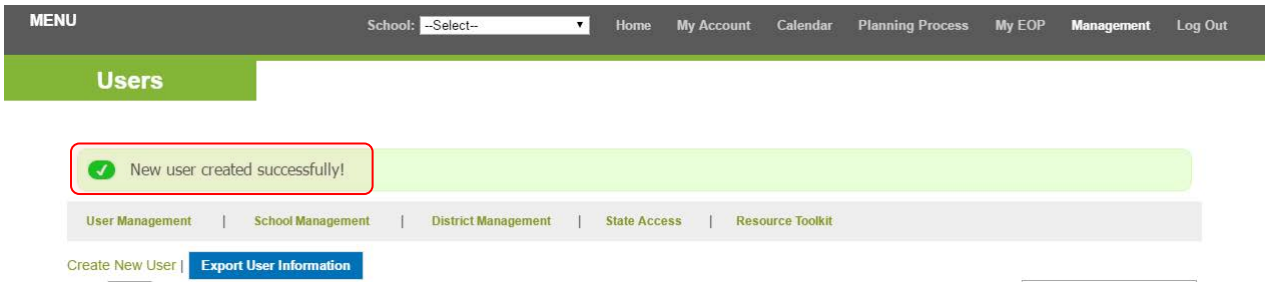
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **District Administrator** in the User Role dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The District Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate district personnel with a role in school emergency management planning have an account in the application. The REMS TA Center recommends that there are at least three District Administrator accounts for each district hosting EOP ASSIST.

Share Log-In Credentials With the District Administrators

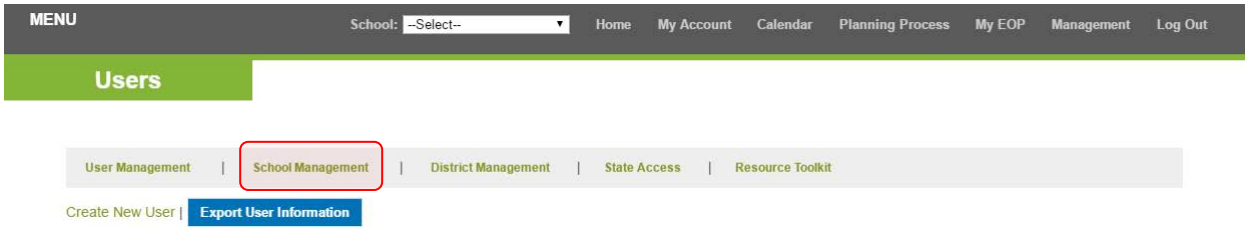
It is important to share the newly created District Administrator accounts' log-in credentials with him or her so that he or she can log in and use the application. He or she may also help you fulfill your remaining responsibilities, since he or she has the same permissions as you. Consider sharing the following information with the District Administrators:

- User ID of the District Administrator account;
- Password of the District Administrator account;
- Reminder that the District Administrator may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

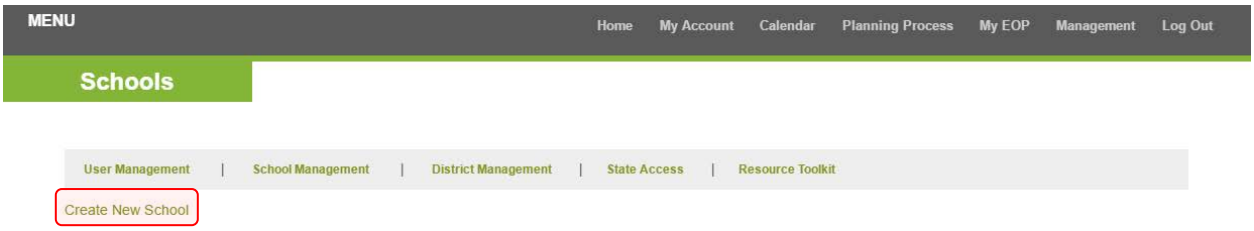
Create School Profiles

You will need to create a profile for each school within your district, so that they can use the application to support their school emergency management planning efforts and have access to the appropriate information. School profiles allow school personnel to manage and oversee their school EOP.

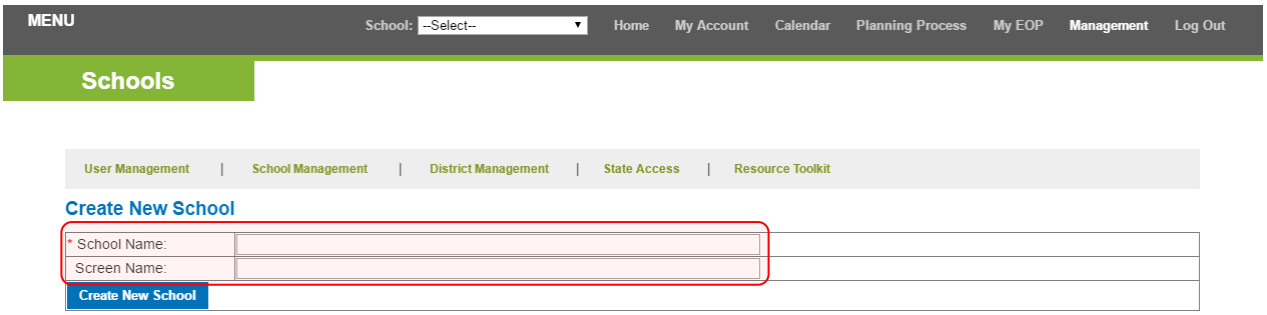
1. Select the **School Management** tab.



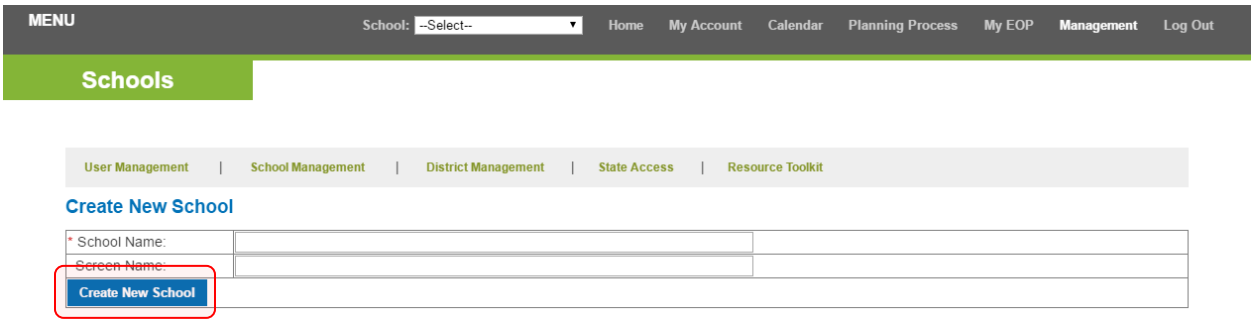
2. Click the **Create New School** button.



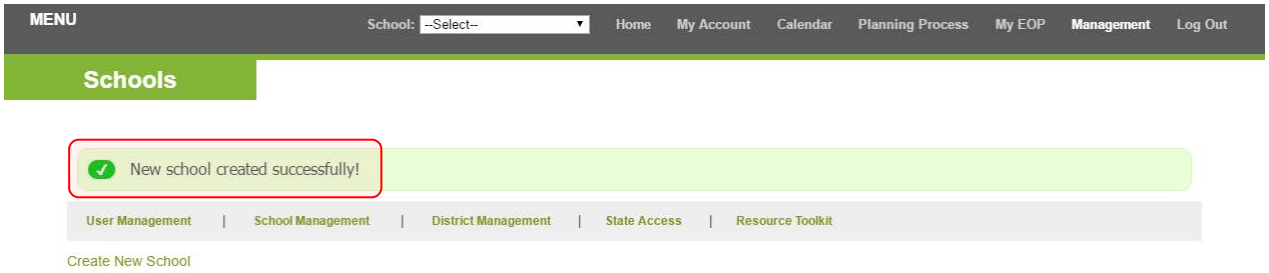
3. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Type the school's name in the School Name field.
    - Type the school's abbreviation in the Screen Name field.



4. Click the **Create New School** button.



5. The school profile information will save, the screen will return to the School List, and a confirmation message that a new school profile was created successfully will appear.

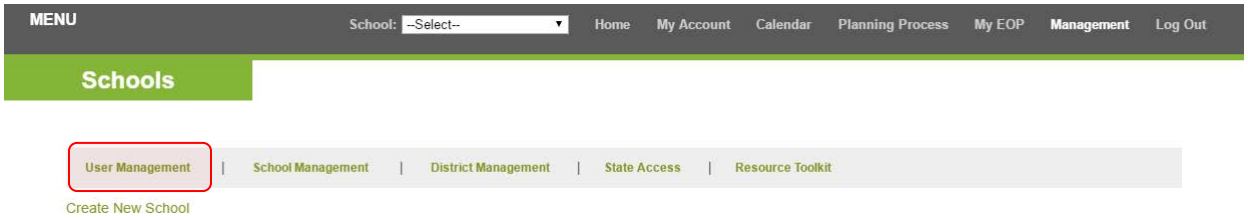


6. Repeat, as necessary, so that all of the schools in your district have a profile in the application.

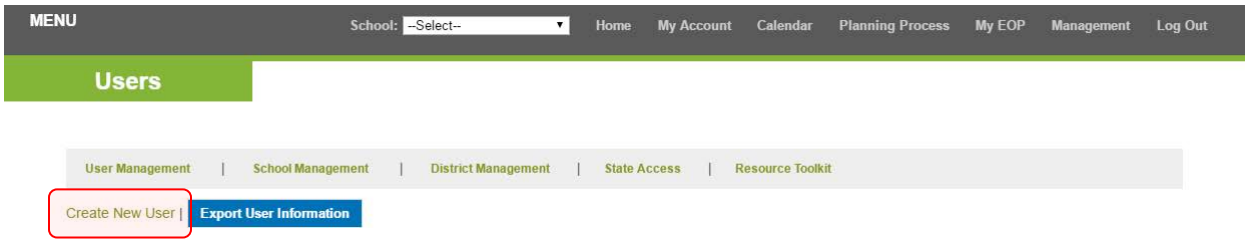
Create School Administrator Accounts

Although each school profile should have at least three School Administrator accounts, the District Administrator is only responsible for creating one School Administrator account for each school profile. It is important for you to create accounts for school personnel so that they can develop and revise their school EOPs and collaborate on school emergency management planning efforts. There are two user roles at the school level, but you will only be responsible for creating School Administrator accounts.

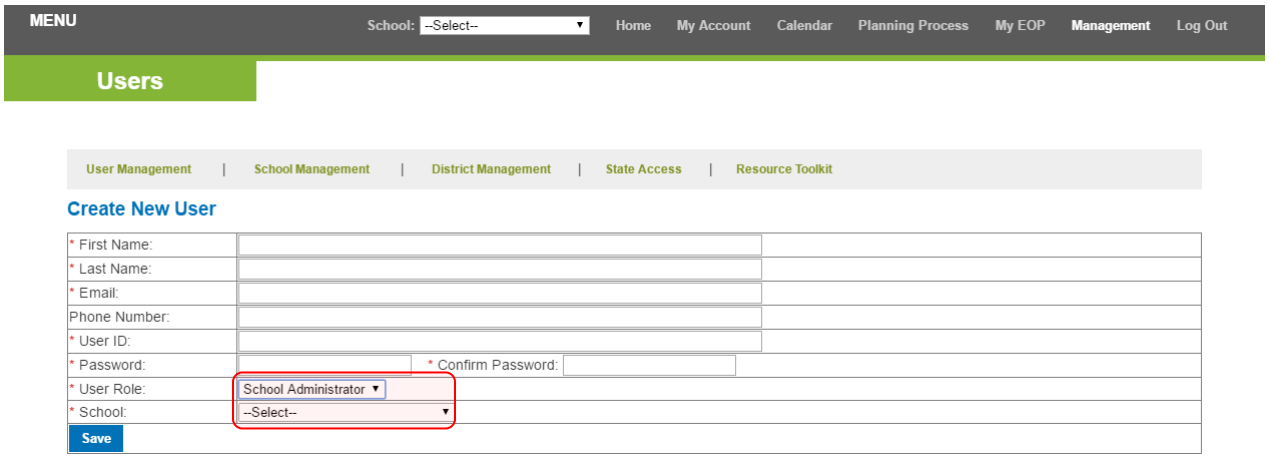
1. Select the **User Management** tab.



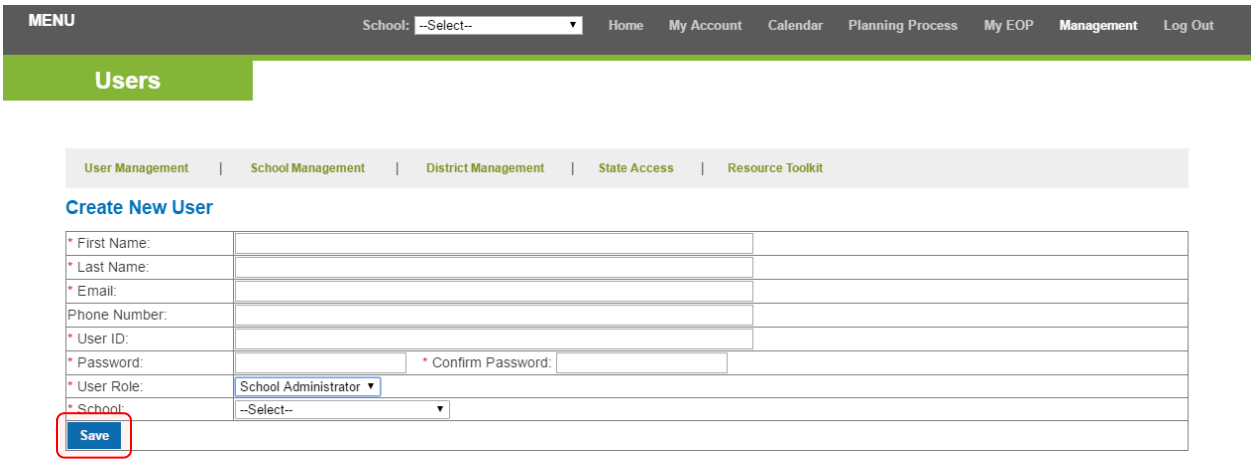
2. Click the **Create New User** button.



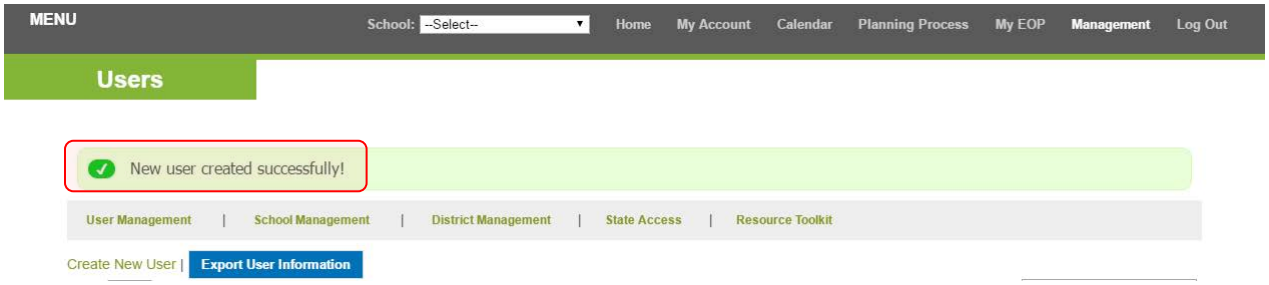
3. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **School Administrator** in the User Role dropdown menu.
   - Select the corresponding school name in the School dropdown menu.



4. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
5. Click the **Save** button.



6. The School Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



7. Repeat, as necessary, so that all of the school profiles in your district have a School Administrator account assigned to them. The REMS TA Center recommends that there are at least three School Administrator accounts for each school profile in EOP ASSIST, but District Administrators are only responsible for creating one user account per school profile.

Share Log-In Credentials With the School Administrators

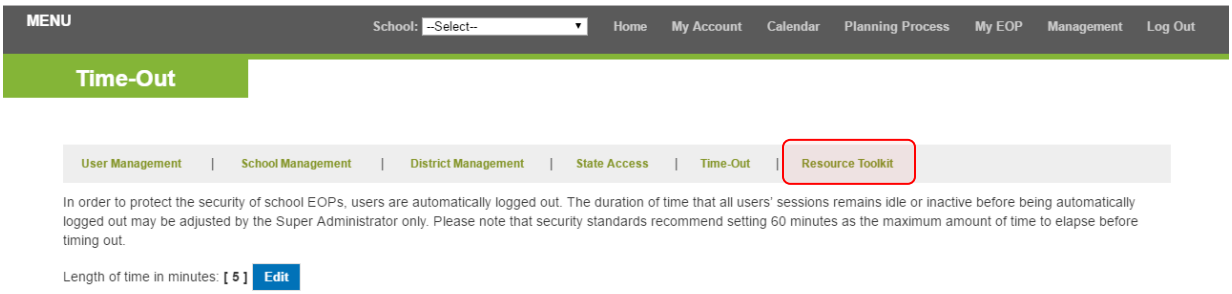
It is important to share the newly created School Administrator accounts' log-in credentials with him or her so that he or she can log in and use the application. Consider sharing the following information with the School Administrators:

- User ID of the School Administrator account;
- Password of the School Administrator account;
- Reminder that the School Administrator may want to change his or her Password;
- Responsibility of the School Administrator to create at least two additional School Administrator accounts;
- Responsibility of the School Administrator to create a School User account for each member of the school's planning team;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

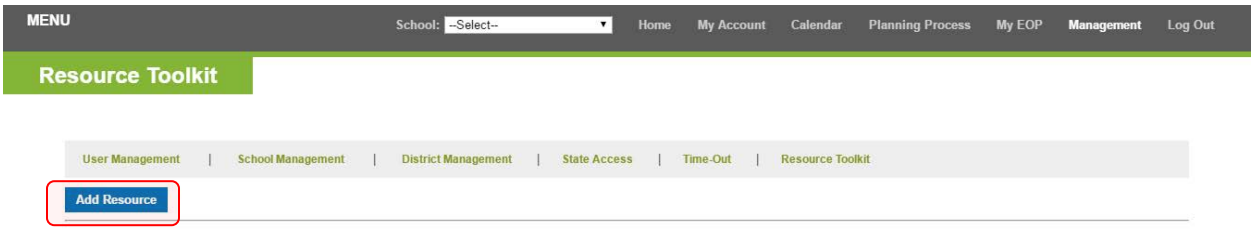
Add District-Specific Resources to the Resource Toolkit

EOP ASSIST 3.0 allows institutions to upload resources that are specific to their state, region, or district to the Resource Toolkit. District Administrators may add emergency management planning resources or guidance that are relevant for all schools within your district, and choose the location of each resource. Resources may be uploaded as files or URLs, and have the capability to be present on multiple pages within the application.

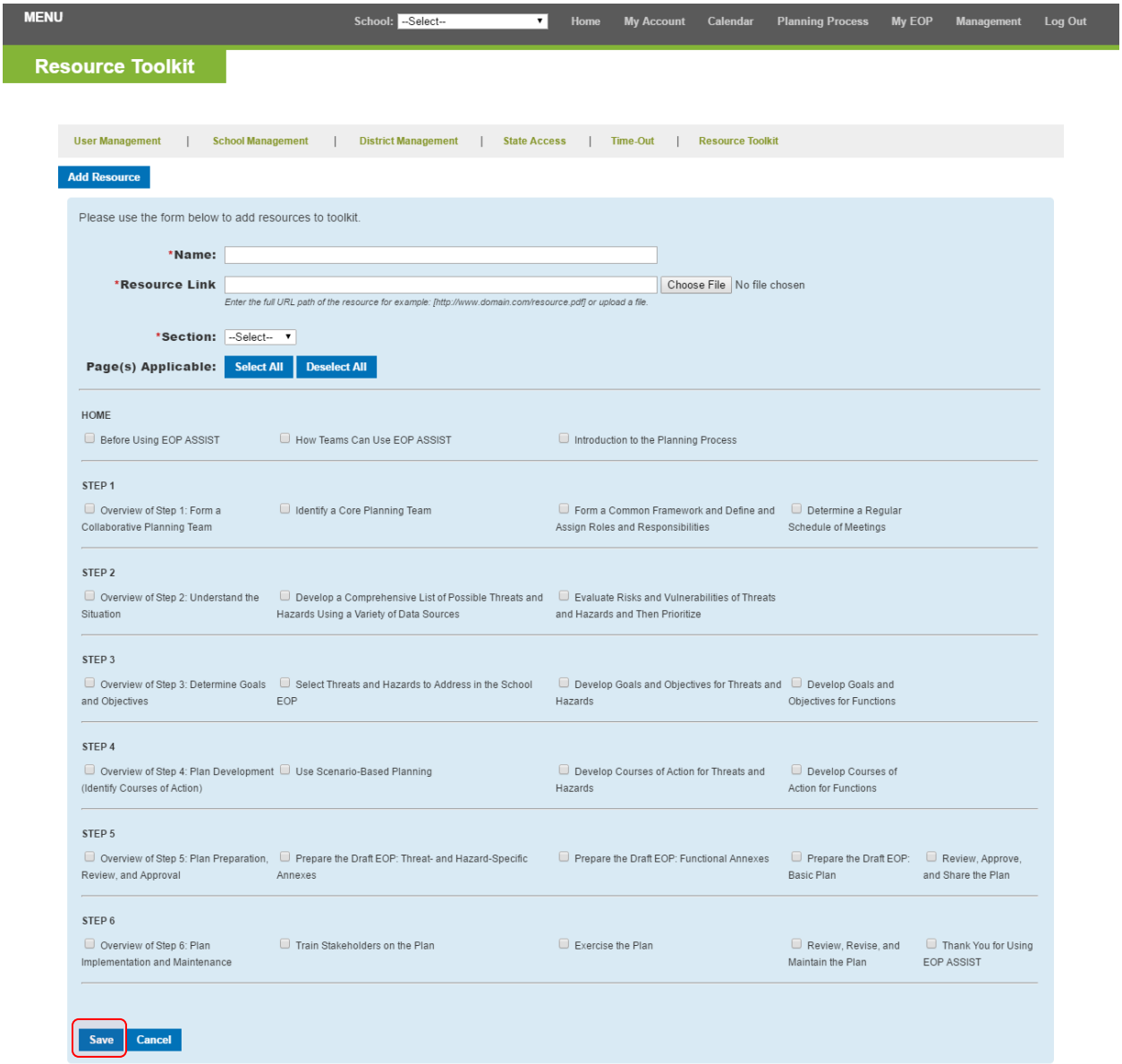
1. Select the **Resource Toolkit** tab.



2. Click the **Add Resource** button.



3. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Type the name of the resource in the Name field. This is the text that will be displayed in the Resource Toolkit.
    - Type the URL of the resource or click the **Choose File** button, if the resource does not have a URL.
    - Select the appropriate label in the Section dropdown menu. This is the section of the Resource Toolkit that the resource will appear.
        i. **Guidance**—recommendations and laws from government agencies and other organizations on school emergency management planning.
        ii. **Resources**—tools, documents, online courses, and training materials that provide supplemental information on specific topics.
        iii. **Examples**—tangible result and product of emergency management planning work (e.g., sample goals and objectives, sample courses of action, sample annexes).
    - Select the check boxes for the applicable pages within the Planning Process section that are relevant to the resources. These are the pages where the resources will appear in the Resource Toolkit.
4. Click the **Save** button.



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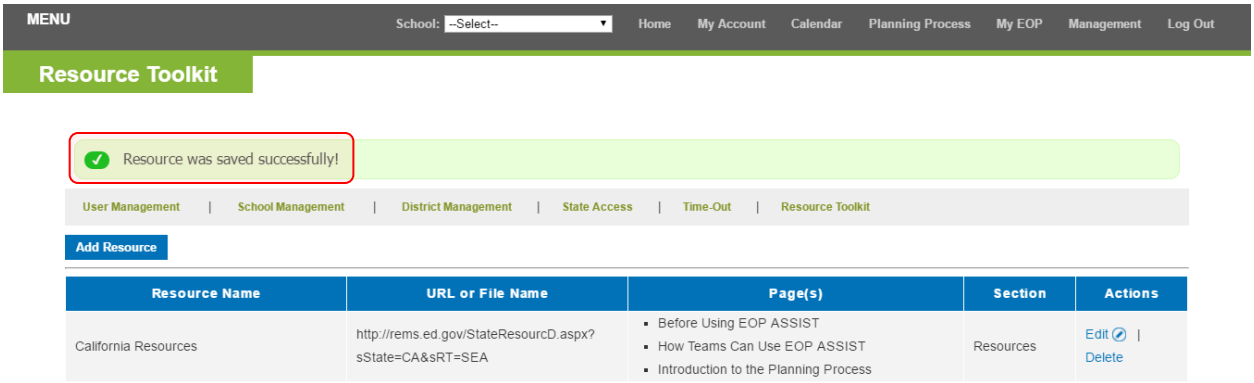
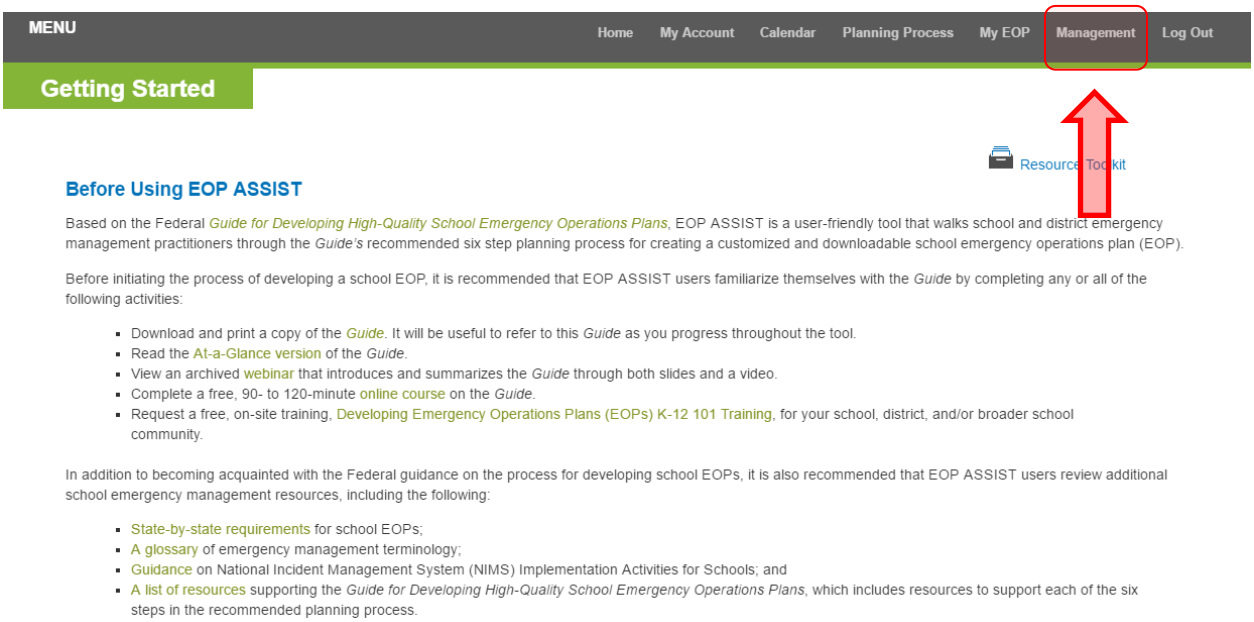
5. The Resource information will save, the screen will return to the Resource Toolkit list, and a confirmation message that a new resource was saved successfully will appear.



School Administrator Responsibilities

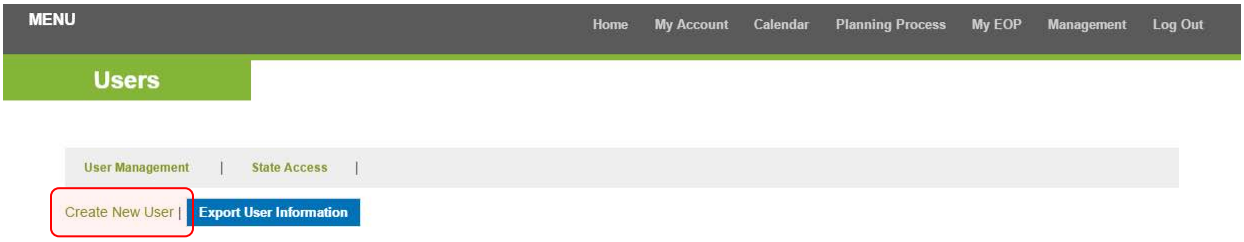
As a School Administrator, you will need to create additional School Administrator and School User accounts. To begin, sign in to the application using the log-in credentials provided by the District Administrator and navigate to the Management section.



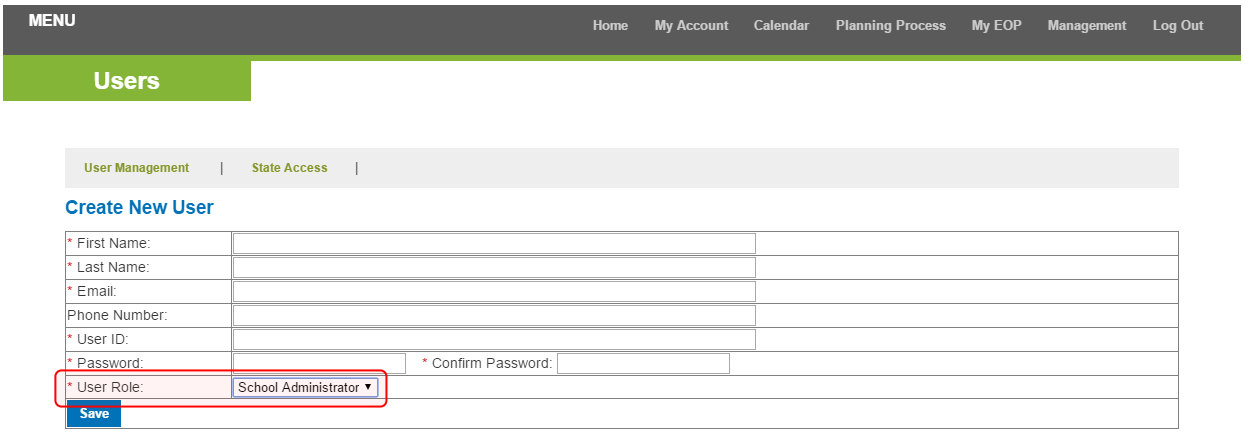
Create School Administrator Accounts

It is important for you to create accounts for your colleagues with a leadership role in school emergency management planning so that the appropriate parties have access to the application to contribute to and review school EOPs and collaborate on school emergency management planning efforts. All School Administrators have the same permissions and, therefore, have the ability to help you create additional School Administrator and School User accounts, which are described in the subsequent subsections.

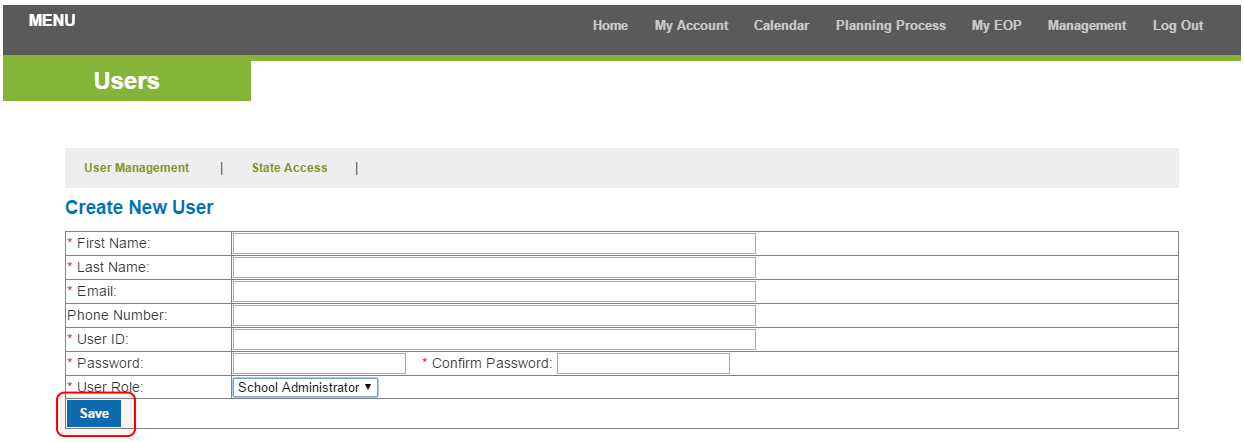
1. Click the **Create New User** button.



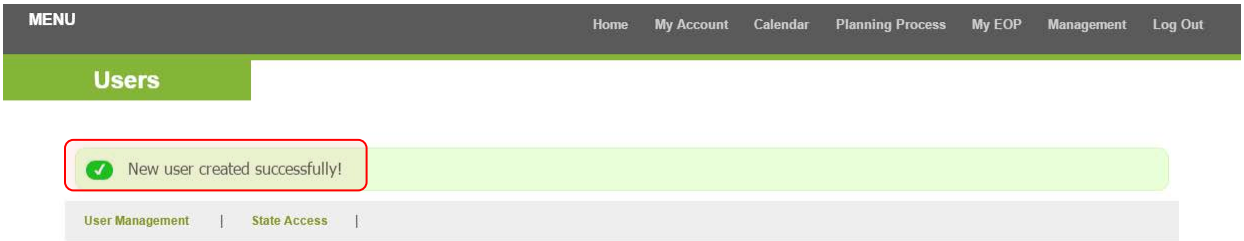
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
    - Select **School Administrator** in the User Role dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The School Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate school personnel with a leadership role in school emergency management planning have an account. The REMS TA Center recommends that there are at least three School Administrator accounts for each school profile in EOP ASSIST.

Share Log-In Credentials With the School Administrators

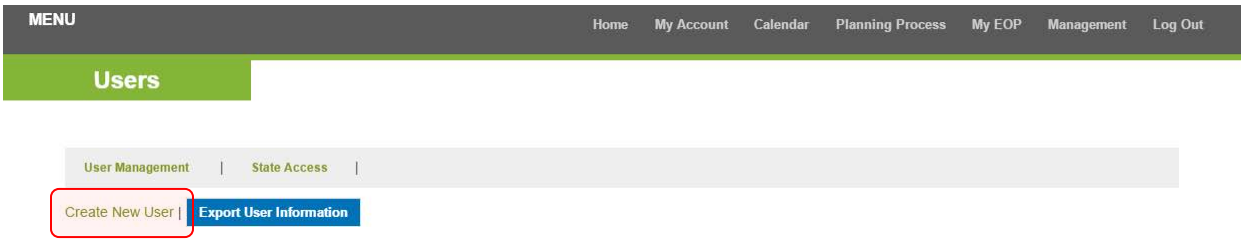
It is important to share the newly created School Administrator accounts' log-in credentials with him or her so that he or she can log in and use the application. He or she may also help you fulfill your remaining responsibilities, since he or she has the same permissions as you. Consider sharing the following information with the School Administrators:

- User ID of the School Administrator account;
- Password of the School Administrator account;
- Reminder that the School Administrator may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

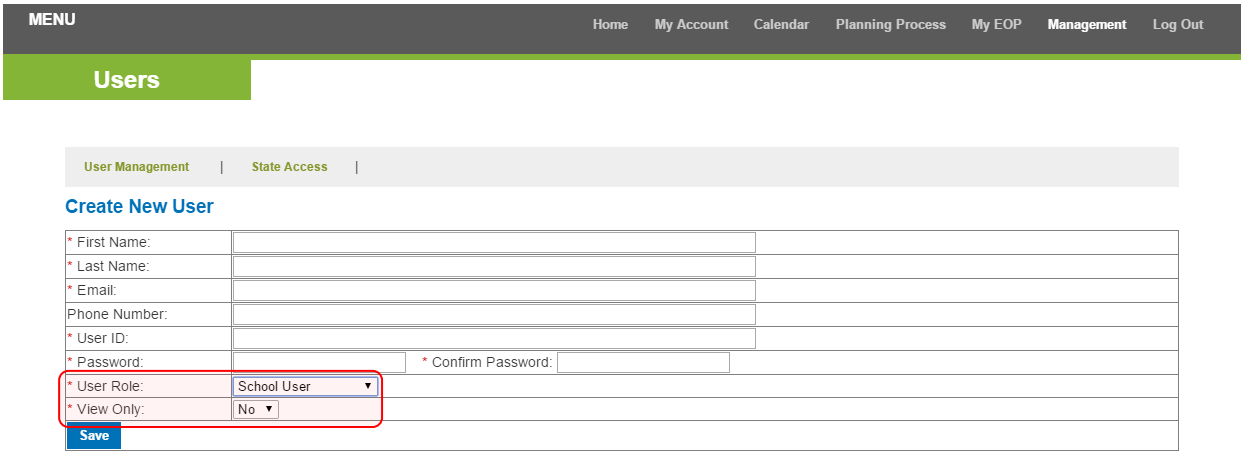
Create School User Accounts

It is important for you to create accounts for the remaining members of the planning team, so that the appropriate parties have access to the application to contribute to school EOPs and collaborate on school emergency management planning efforts. Unlike School Administrators, School Users do not have any management responsibilities.

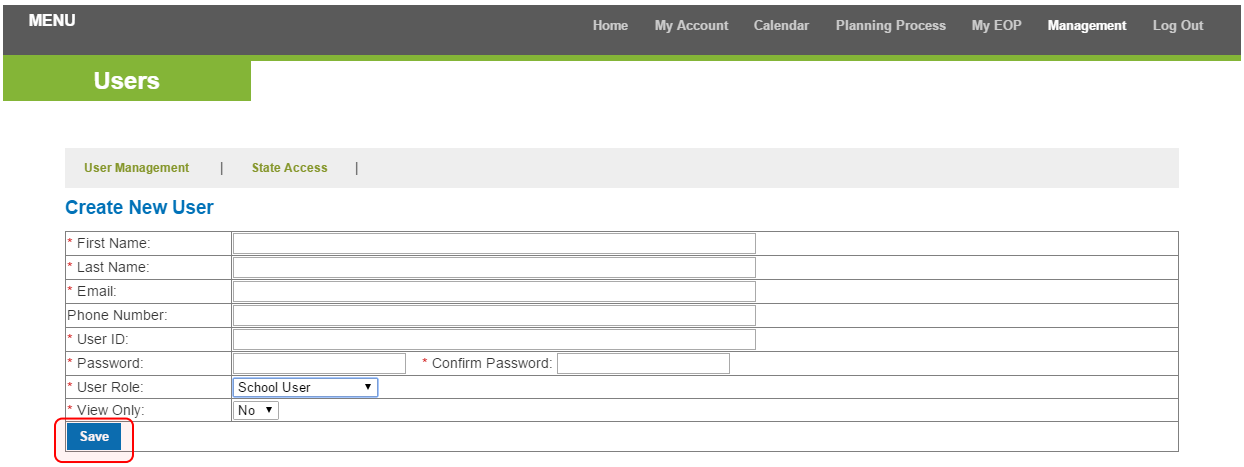
1. Click the **Create New User** button.



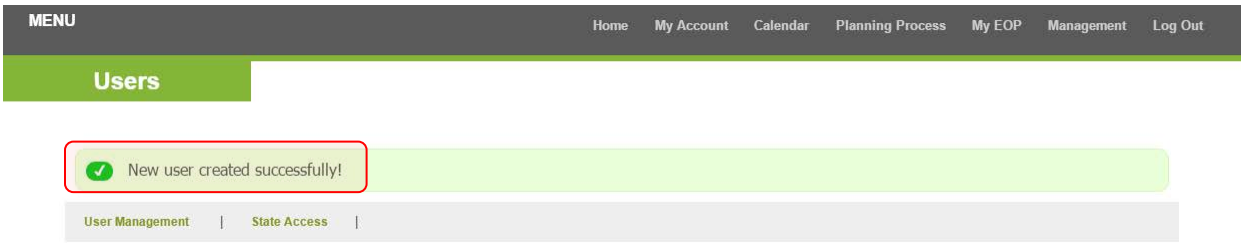
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
    - Select **School User** in the User Role dropdown menu.
    - Select **No** in the View Only dropdown menu, which will allow the School User to contribute to and edit the school EOP. In the few cases that the School User should only be granted viewing permissions, select Yes in the View Only dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The School User name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate school personnel with a role in school emergency management planning have an account.

Share Log-In Credentials With the District Administrators

It is important to share the newly created School User accounts' log-in credentials with him or her so that he or she can log in and use the application. Consider sharing the following information with the School Users:

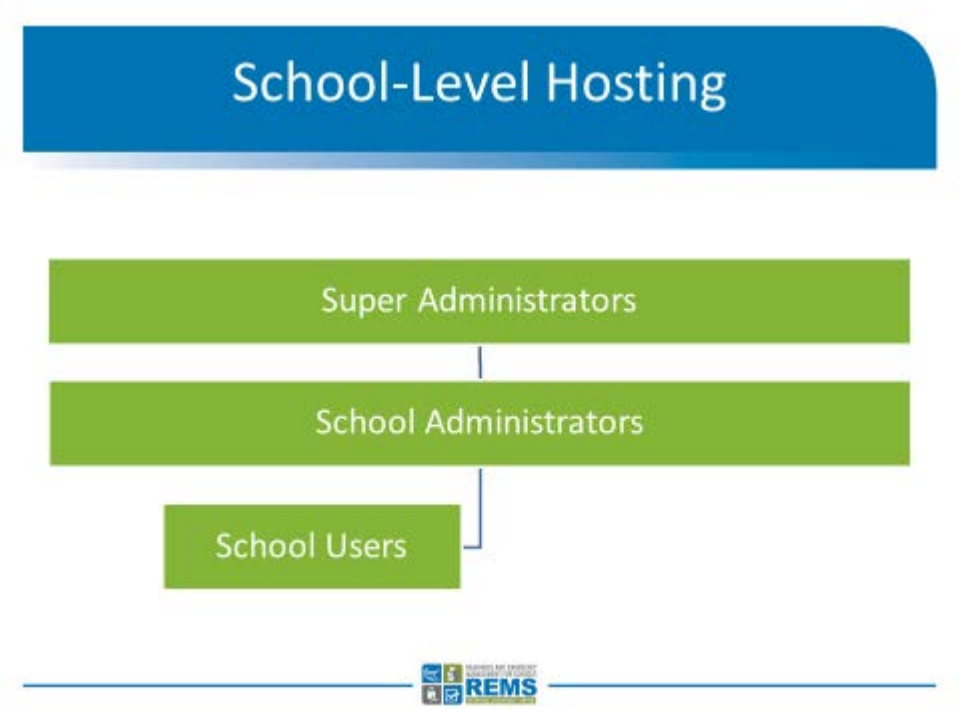
- User ID of the School User account;
- Password of the School User account;
- Reminder that the School User may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

School User Responsibilities

This is the user role of the majority of EOP ASSIST user accounts. You serve as a member of your school's planning team, but have no management responsibilities in the application. You may begin contributing to your school EOP, which is described in more detail in Chapter 5.

School-Level Hosting

This allows schools to have access to the application without relying on any other organization. Typically, a school will host the application for themselves because they are an independent school and/or their district, REA, or state agency has chosen not to host the application for them. Schools who host EOP ASSIST at this level may log in to the application to develop and revise their school EOP, which is stored on the school's server. Below is an image of the hierarchy of various user roles within EOP ASSIST in school-level hosting.



The Super Administrator should have already set up the school account, as outlined in the *EOP ASSIST 3.0 Installation Manual*, and created at least one School Administrator who is associated with the school. Once the School Administrator's log-in credentials are shared with him or her, the School Administrator is responsible for creating additional user accounts to have access to the application. Below is an overview of the initial responsibilities of each user role available in school-level hosting.

- **Super Administrator**
  - Sets up the school account
  - Creates at least one School Administrator account
- **School Administrator**
  - Creates additional School Administrator accounts
  - Creates School User accounts
- **School User**
  - No management responsibilities

Please refer to the following subsection that correlates with your user role in order to learn more about your responsibilities.

Super Administrator Responsibilities

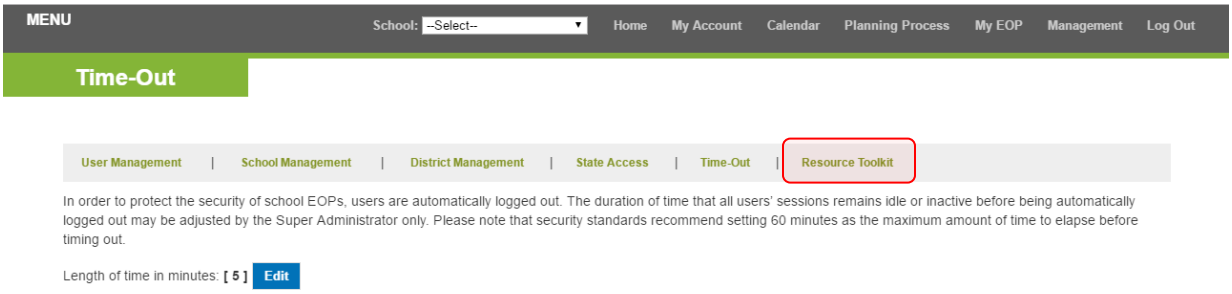
Typically, the Super Administrator is IT personnel at the school hosting the application, and is a user role for which at least three individuals at the school should have access to the log-in credentials. The Super Administrator serves as the database manager and is responsible for installing EOP ASSIST 3.0. He or she also sets up the school's account, creates log-in credentials for at least one School Administrator, and shares the first School Administrator's log-in credential with him or her. From this point on, the Super Administrator is responsible for managing the back-end database, as needed, and the Website through which the application is accessed by all users. The Super Administrator has access to all management features outlined in Chapter 6, and he or she can reset any user's password, upon request.

For instructions on how to set up the school's account and create a School Administrator, please refer to the *EOP ASSIST 3.0 Installation Manual.*

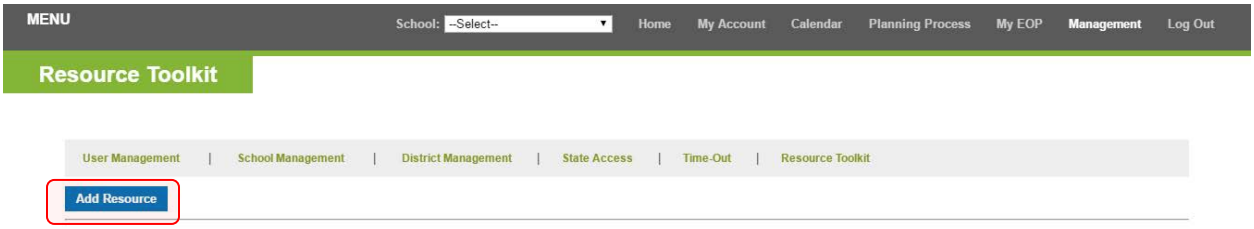
Add School-Specific Resources to the Resource Toolkit

EOP ASSIST 3.0 allows institutions to upload resources that are specific to their state, region, or district to the Resource Toolkit. In school-level hosting, only the Super Administrator may add emergency management planning resources or guidance that are relevant for your school, and choose the location of each resource. Resources may be uploaded as files or URLs, and have the capability to be present on multiple pages within the application.

1. Select the **Resource Toolkit** tab.



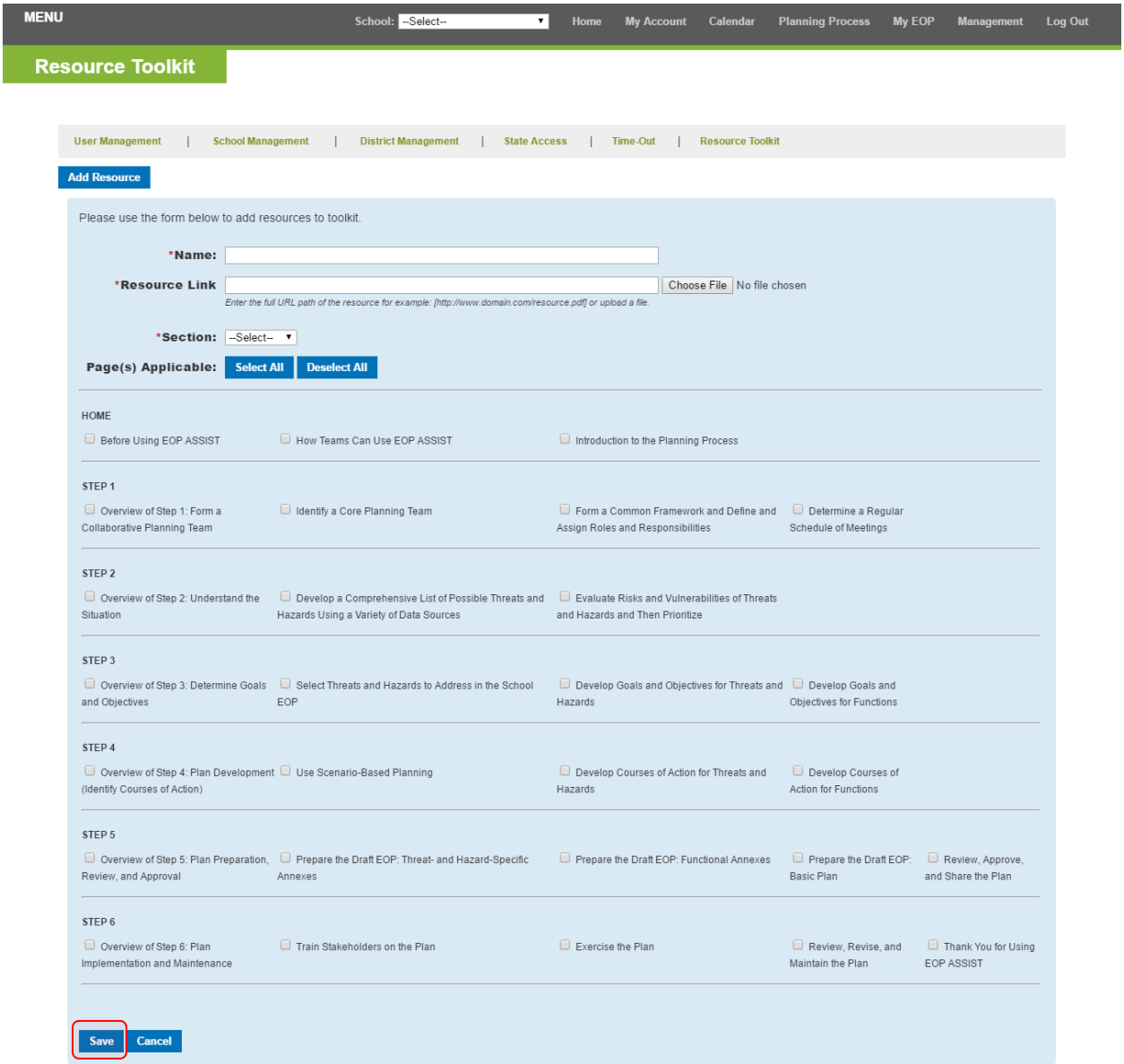
2. Click the **Add Resource** button.



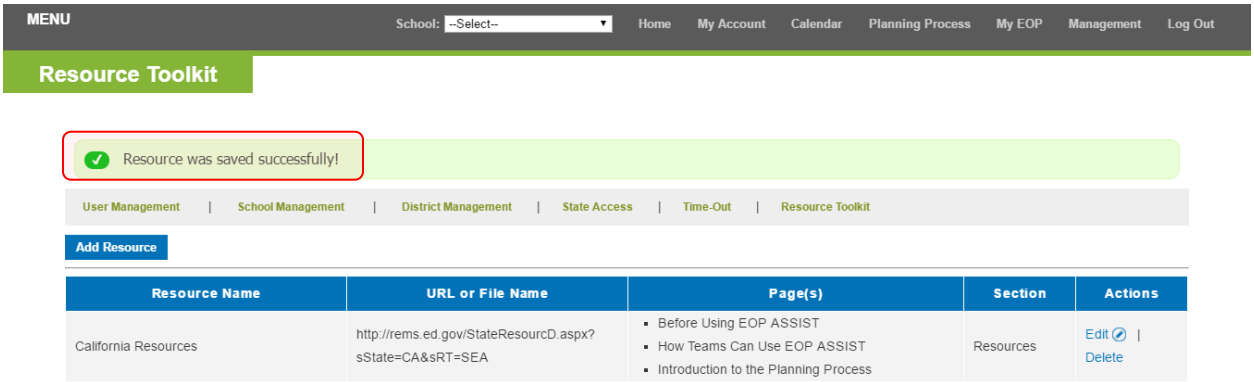
3. Fill all of the required fields (noted with an asterisk) in the form that appears.

- Type the name of the resource in the Name field. This is the text that will be displayed in the Resource Toolkit.
- Type the URL of the resource or click the **Choose File** button, if the resource does not have a URL.
- Select the appropriate label in the Section dropdown menu. This is the section of the Resource Toolkit that the resource will appear.
    i. **Guidance**—recommendations and laws from government agencies and other organizations on school emergency management planning.
    ii. **Resources**—tools, documents, online courses, and training materials that provide supplemental information on specific topics.
    iii. **Examples**—tangible result and product of emergency management planning work (e.g., sample goals and objectives, sample courses of action, sample annexes).
- Select the check boxes for the applicable pages within the Planning Process section that are relevant to the resources. These are the pages where the resources will appear in the Resource Toolkit.

4. Click the **Save** button.

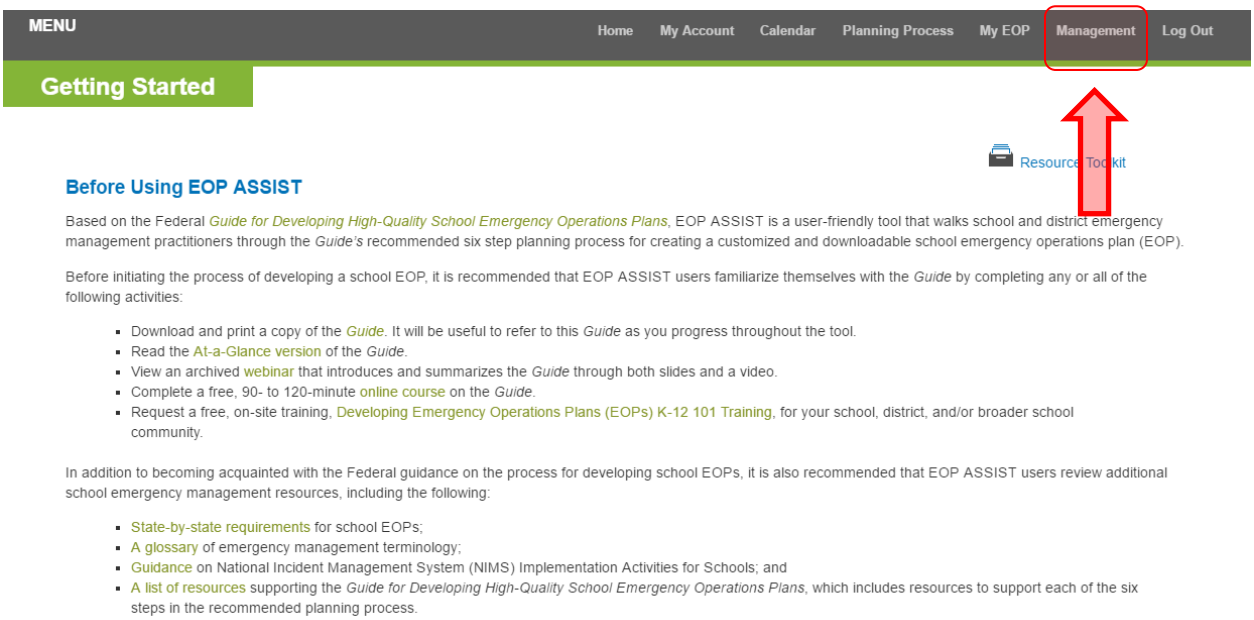


5. The Resource information will save, the screen will return to the Resource Toolkit list, and a confirmation message that a new resource was saved successfully will appear.



School Administrator Responsibilities

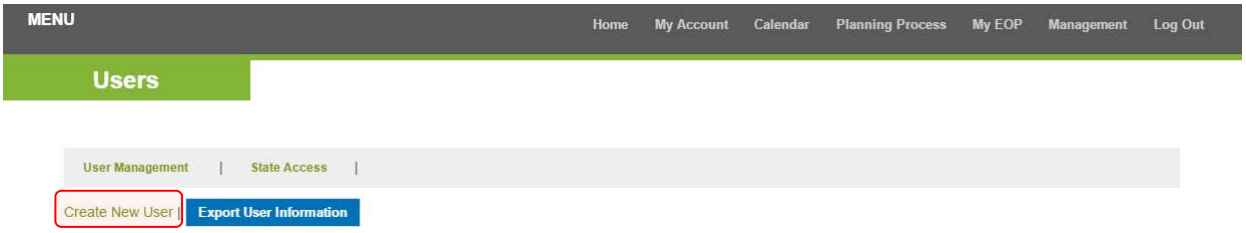
As a School Administrator, you will need to create additional School Administrator and School User accounts. To begin, sign in to the application using the log-in credentials provided by the Super Administrator and navigate to the Management section.



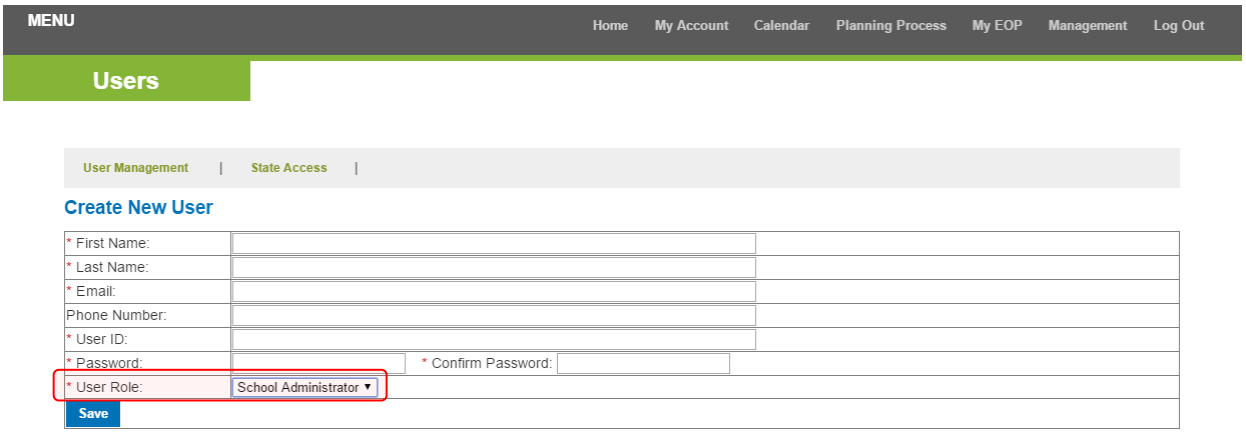
Create School Administrator Accounts

It is important for you to create accounts for your colleagues with a leadership role in school emergency management planning so that the appropriate parties have access to the application to contribute to and review school EOPs and collaborate on school emergency management planning efforts. All School Administrators have the same permissions and, therefore, have the ability to help you create additional School Administrator and School User accounts, which are described in the subsequent subsections.

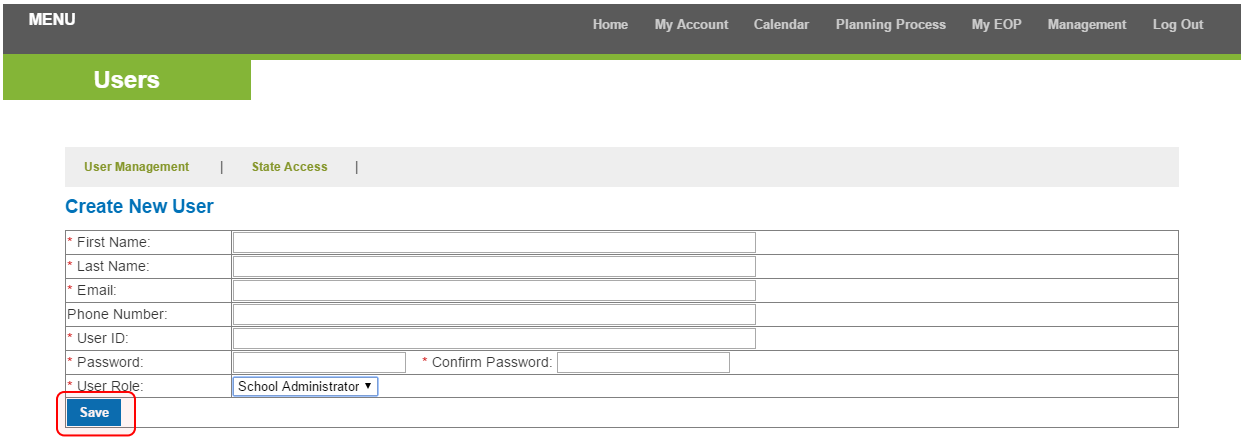
1. Click the **Create New User** button.



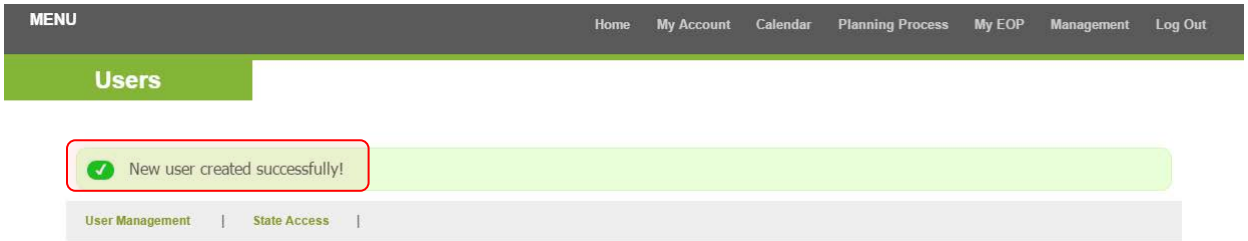
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **School Administrator** in the User Role dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The School Administrator name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate school personnel with a leadership role in school emergency management planning have an account in the application. The REMS TA Center recommends that there are at least three School Administrator accounts for each school hosting EOP ASSIST.

Share Log-In Credentials With the School Administrators

It is important to share the newly created School Administrator accounts' log-in credentials with him or her, so that he or she can log in and use the application. He or she may also help you fulfill your remaining responsibilities, since he or she has the same permissions as you. Consider sharing the following information with the School Administrators:

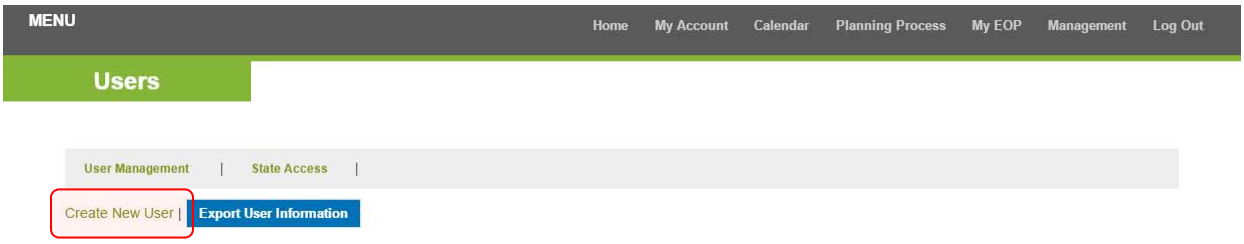
- User ID of the School Administrator account;
- Password of the School Administrator account;
- Reminder that the School Administrator may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

Create School User Accounts

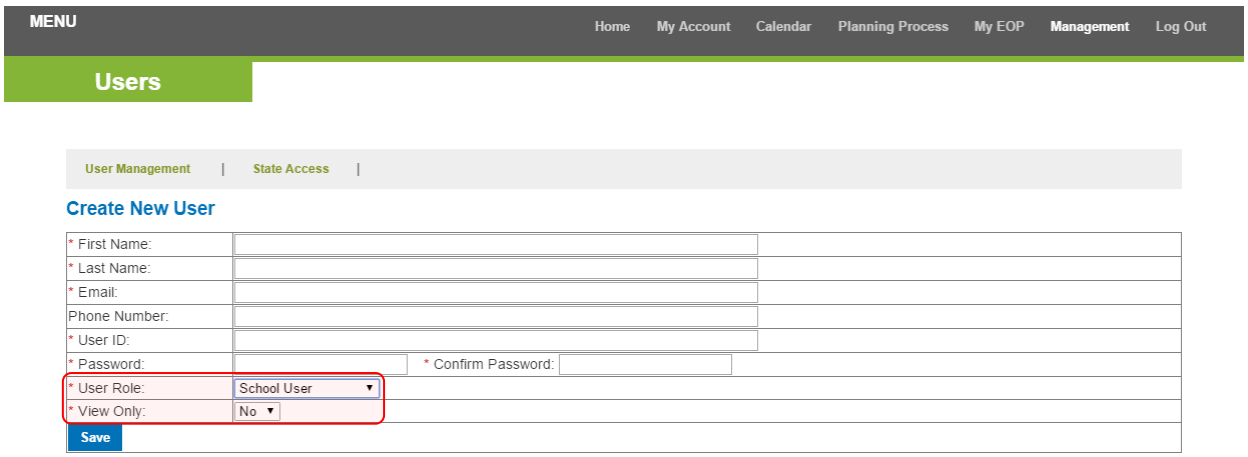
It is also important for you to create accounts for the remaining members of the planning team so that the appropriate parties have access to the application to contribute to school EOPs and collaborate on

school emergency management planning efforts. Unlike School Administrators, School Users do not have any management responsibilities.

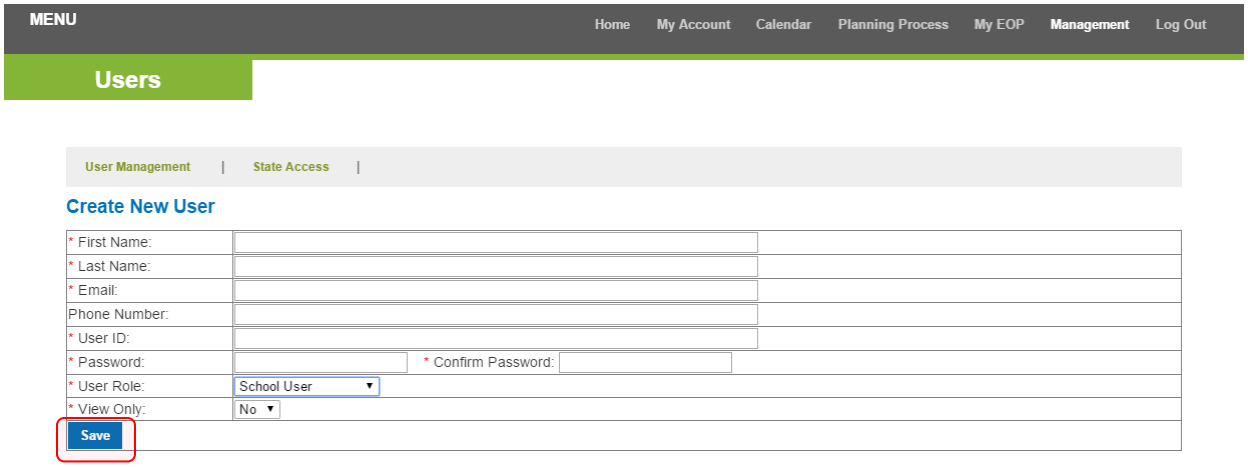
1. Click the **Create New User** button.



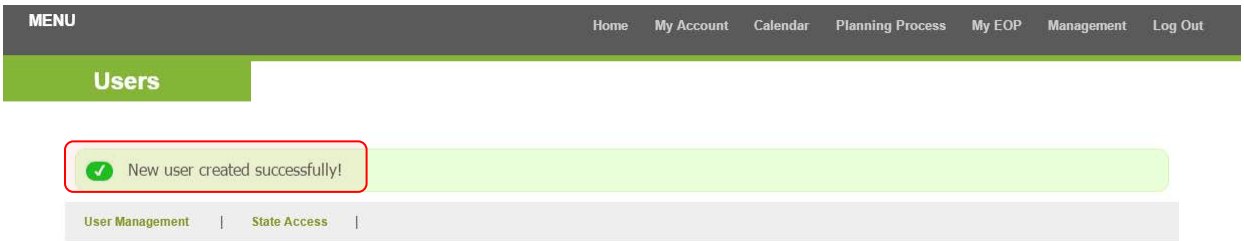
2. Fill out all of the required fields (noted with an asterisk) in the form that appears.
   - Select **School User** in the User Role dropdown menu.
   - Select **No** in the View Only dropdown menu, which will allow the School User to contribute to and edit the school EOP. In the few cases that the School User should only be granted viewing permissions, select Yes in the View Only dropdown menu.



3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The School User name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



6. Repeat, as necessary, so that all of the appropriate school personnel with a role in school emergency management planning have an account in the application.

Share Log-In Credentials With the School Users

It is important to share the newly created School User accounts' log-in credentials with him or her, so that he or she can log in and use the application. Consider sharing the following information with the School Users:

- User ID of the School User account;
- Password of the School User account;
- Reminder that the School User may want to change his or her Password;
- *EOP ASSIST 3.0 User Manual* as a reference guide; and
- EOP ASSIST Video Tutorials as resources.

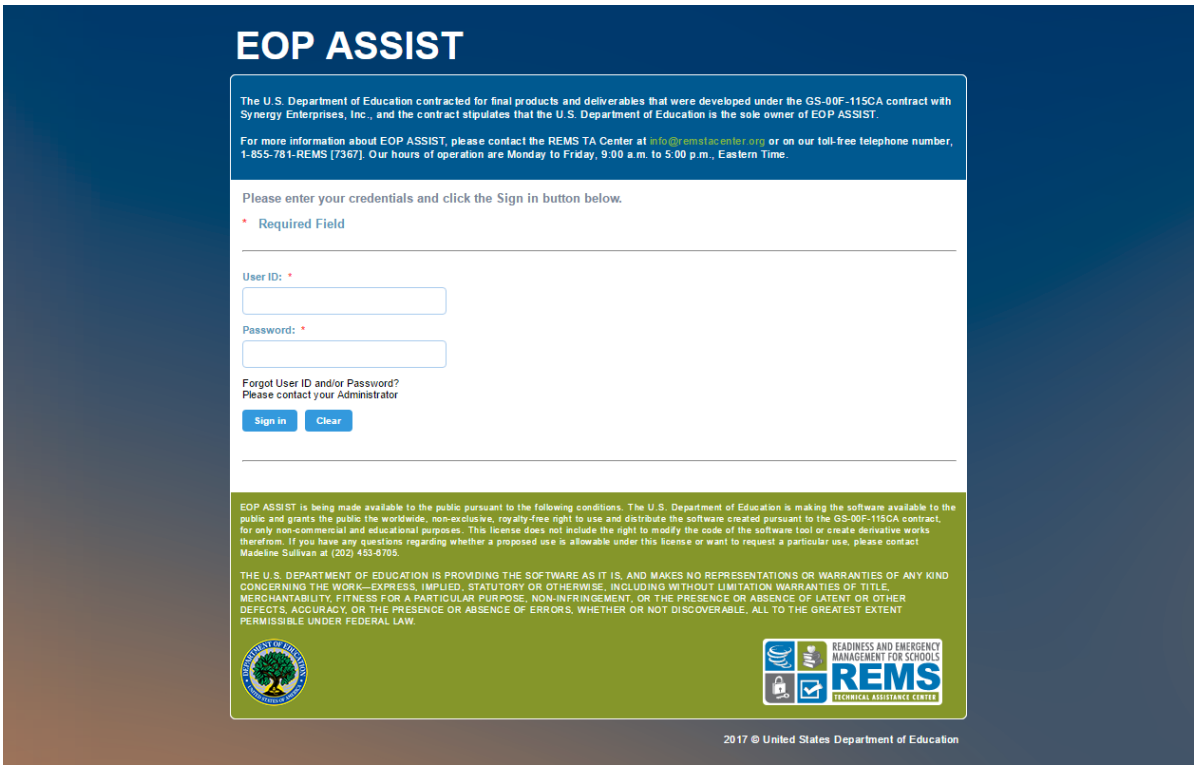
School User Responsibilities

This is the user role of the majority of EOP ASSIST user accounts. You serve as a member of your school's planning team, but have no management responsibilities in the application. You may begin contributing to your school EOP, which is described in more detail in Chapter 5.

Chapter 3: Account Management

Logging In

Each time you open EOP ASSIST, you will be presented with the Log-In screen, which asks for your User ID and password. This security feature helps to ensure that only authorized members of your school's collaborative planning team can contribute to the development of your EOP. Each member of the planning team will be assigned a unique User ID and password by an Administrator. If you are at the school level, please check with one of your School Administrators or district office for these credentials, if you do not have them already. If you are at the district level, please check with someone at your district office (or if you are using your state's account), you may also check with the state agency that is hosting the application. If you are at the state level, please check with another State Administrator at your agency. Please note that the REMS TA Center is unable to provide log-in credentials for EOP ASSIST since the application is installed locally on a state, district, or school server.



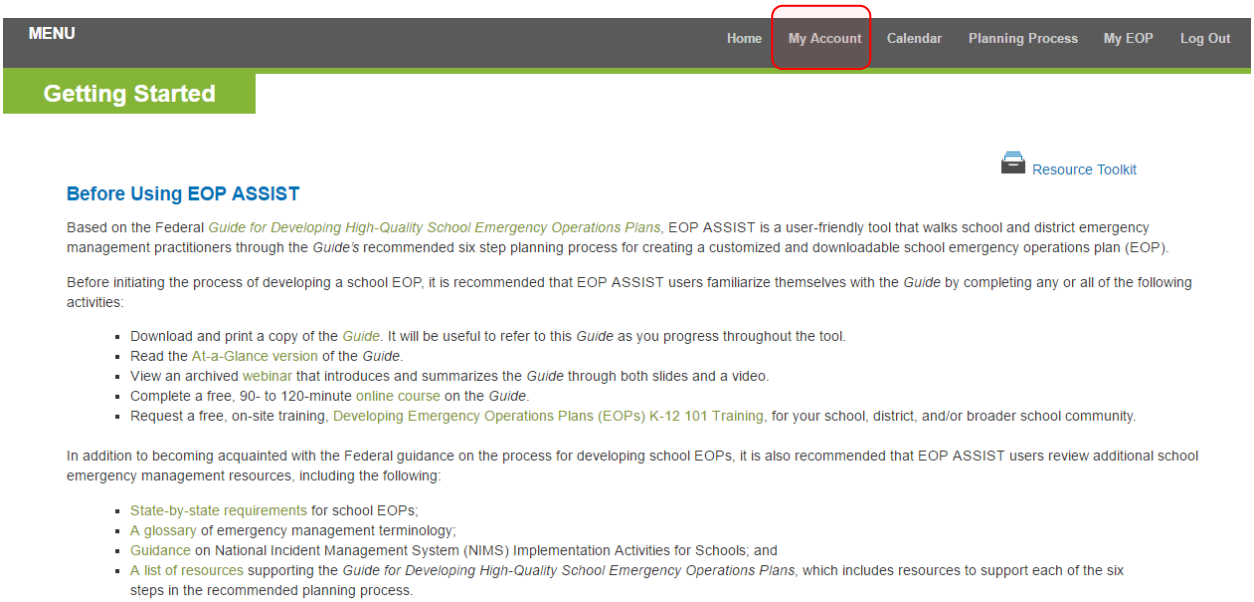
1. Fill the required fields.
2. Click the **Sign-In** button.
3. Once you enter your correct User ID and password, you will be directed to the Home screen, which is described in the next section.

Please note: *Instructions on how to change your password and User ID, as well as how to log out, are provided later in this chapter. If you encounter issues logging into EOP ASSIST, please refer to* [*Appendix A*](#).

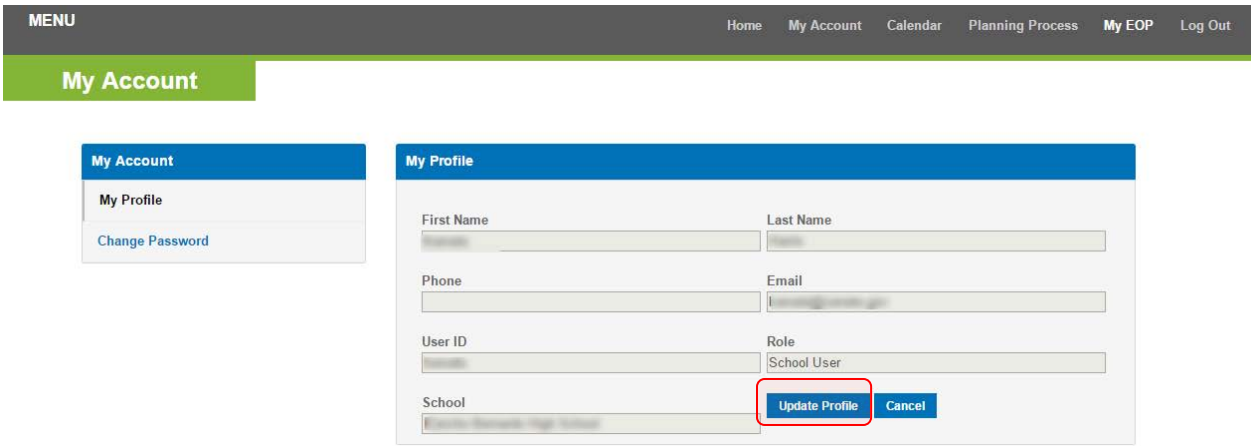
Changing My User ID and Contact Information

You may also change your User ID at any time.

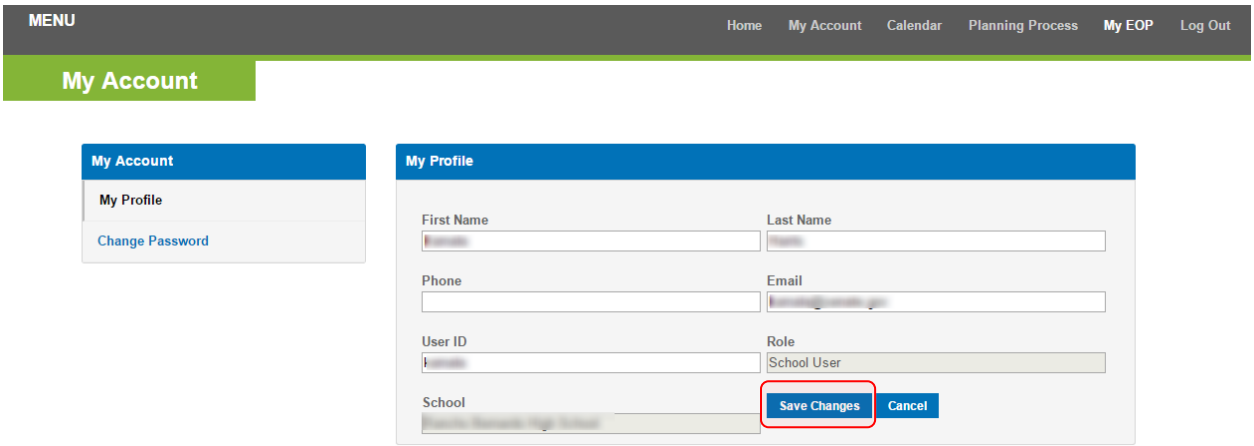
1. Select **My Account** in the Navigation Bar.



2. Information associated with your user account will appear, including your name, phone number, email address, user ID, user role, and affiliation.
3. Click the **Update Profile** button.



4. Fill or edit the required fields
5. Click the **Save Changes** button.

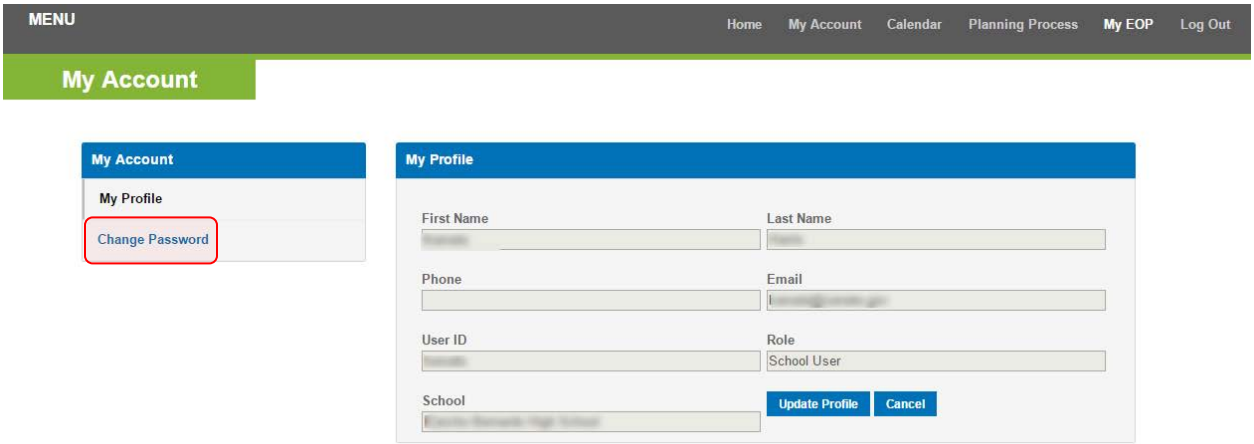


Please note: *The new User ID will be effective upon your next login. If you are unable to successfully change your User ID, please refer to Appendix A. Users cannot change their own role or affiliation. For more information on how administrators can update this information, please refer to Chapter 6.*

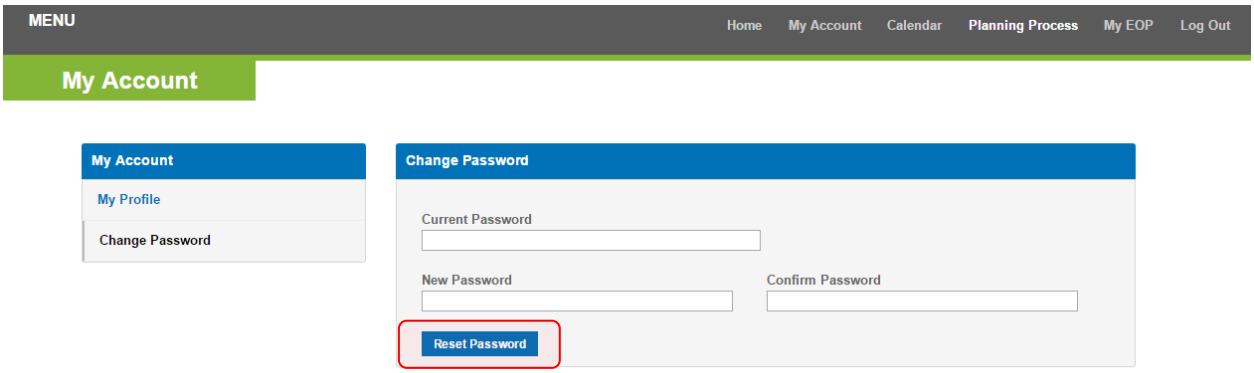
Changing My Password

It is recommended that you change your password during the first time you log in, if you were assigned a User ID and password. You can change your password more than once, at any time, as needed. No individual, including administrators, should have access to a user's password, except for that individual user.

1. Click the **Change Password** tab.



2. Fill the required fields. You will be prompted to enter your current password and new password. All passwords must be at least 6 characters in length.
3. Click the **Reset Password** button.

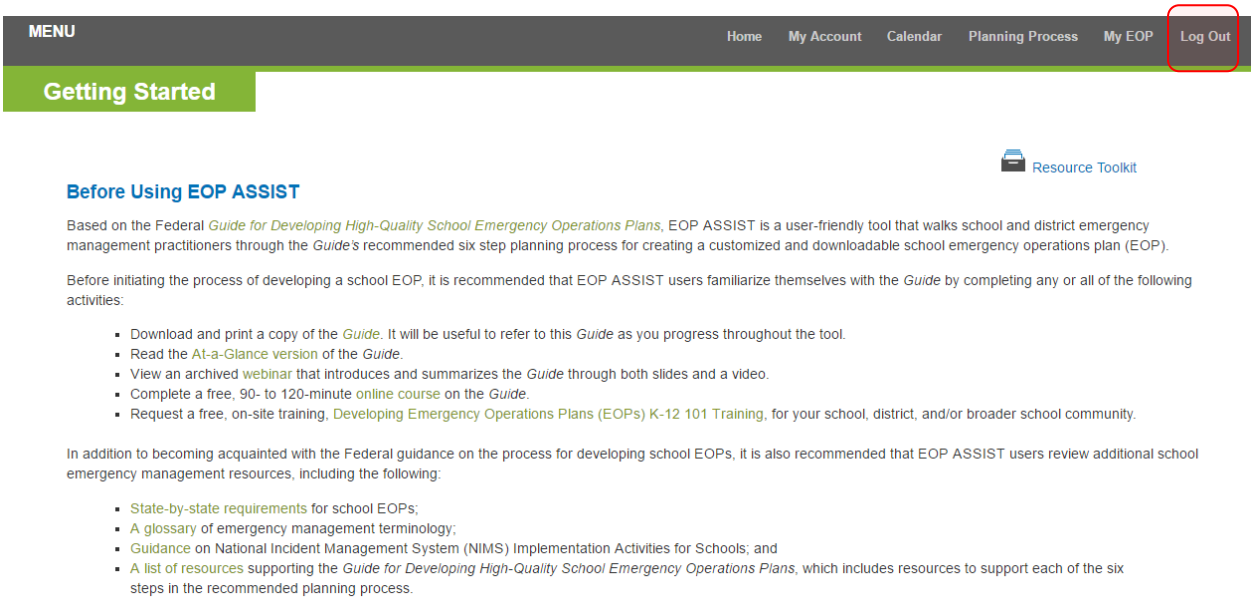


Please note: *The new password will be effective upon your next login. If you are unable to change your password successfully, please refer to* [*Appendix A*](#)*.*

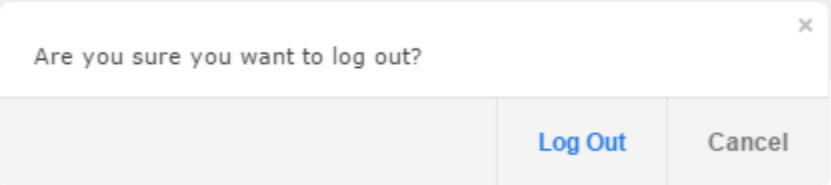
Logging Out

To protect the security of your school EOP, you should log out at the end of each session.

1. Select **Log Out** in the Navigation Bar.

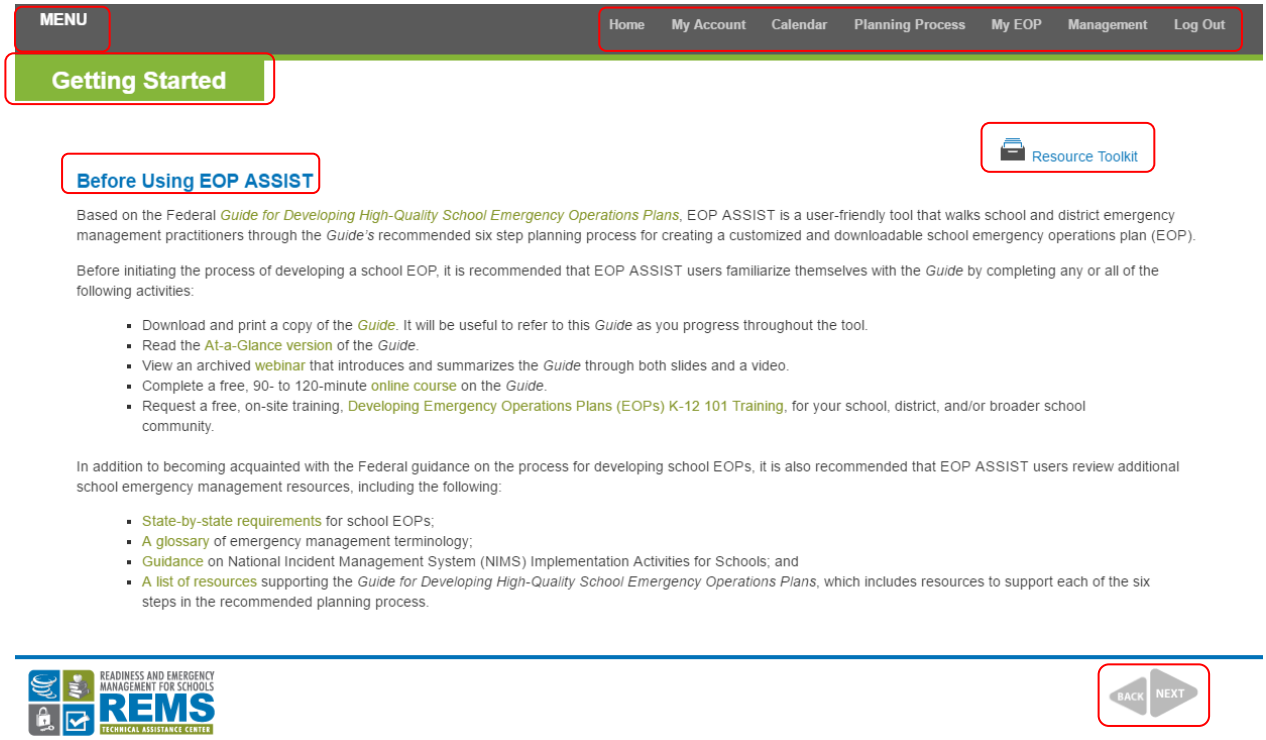


2. Click the **Log Out** button.



Chapter 4: Layout and Features Overview

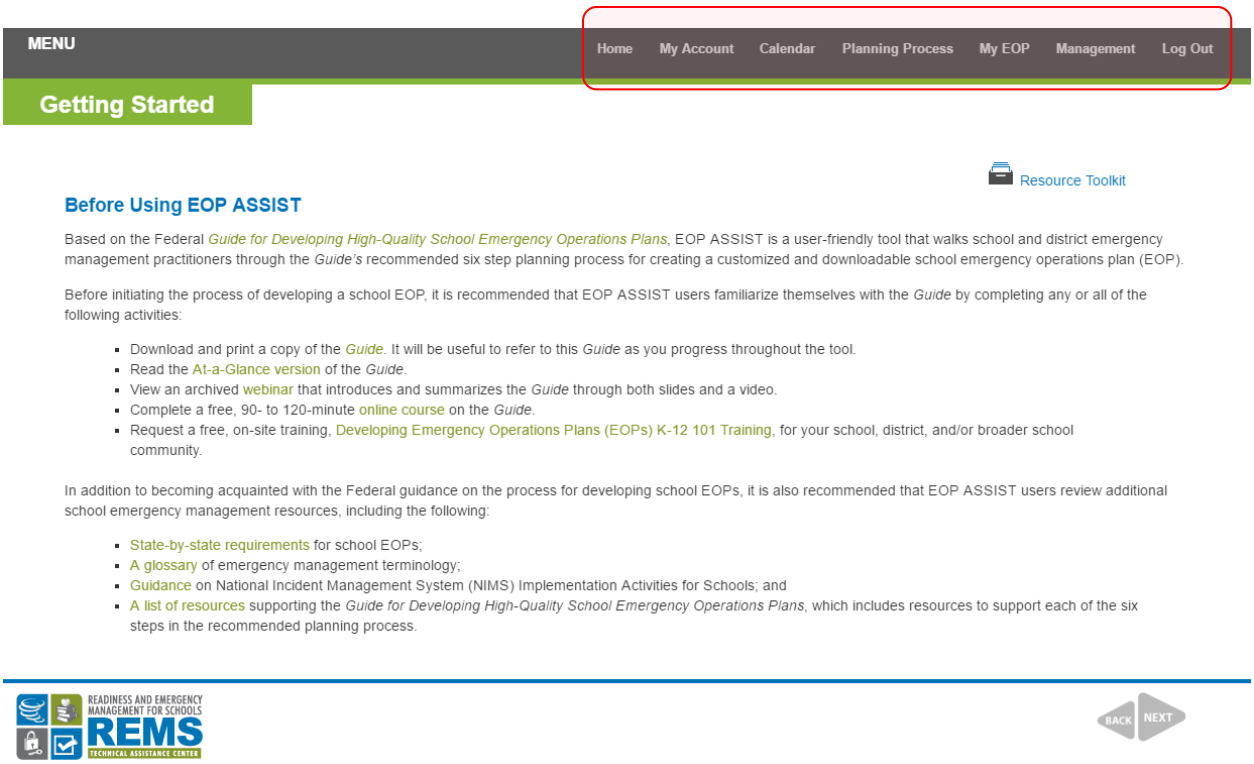
If you are a school-based user, each time you log in to EOP ASSIST, you will first see the Home screen. This screen provides you with resources to support your understanding of the *School Guide*, which the EOP ASSIST is based on. It is important to familiarize yourself with both the content of the *School Guide* and the overall layout of EOP ASSIST to facilitate the development of a high-quality school EOP.



Please note: *State Administrators and District Administrators will see a different screen when they first log in, which is discussed in further detail in* *Chapter 6*.

Navigation Bar

EOP ASSIST is organized into six sections (or seven, if you have a School Administrator, District Administrator, or State Administrator User Role), which are displayed at the top of your screen in a dark gray ribbon. This is the Navigation Bar, which allows users to navigate through the various sections of EOP ASSIST: Home, My Account, Calendar, Planning Process, My EOP, Management (for administrators only), and Log Out.

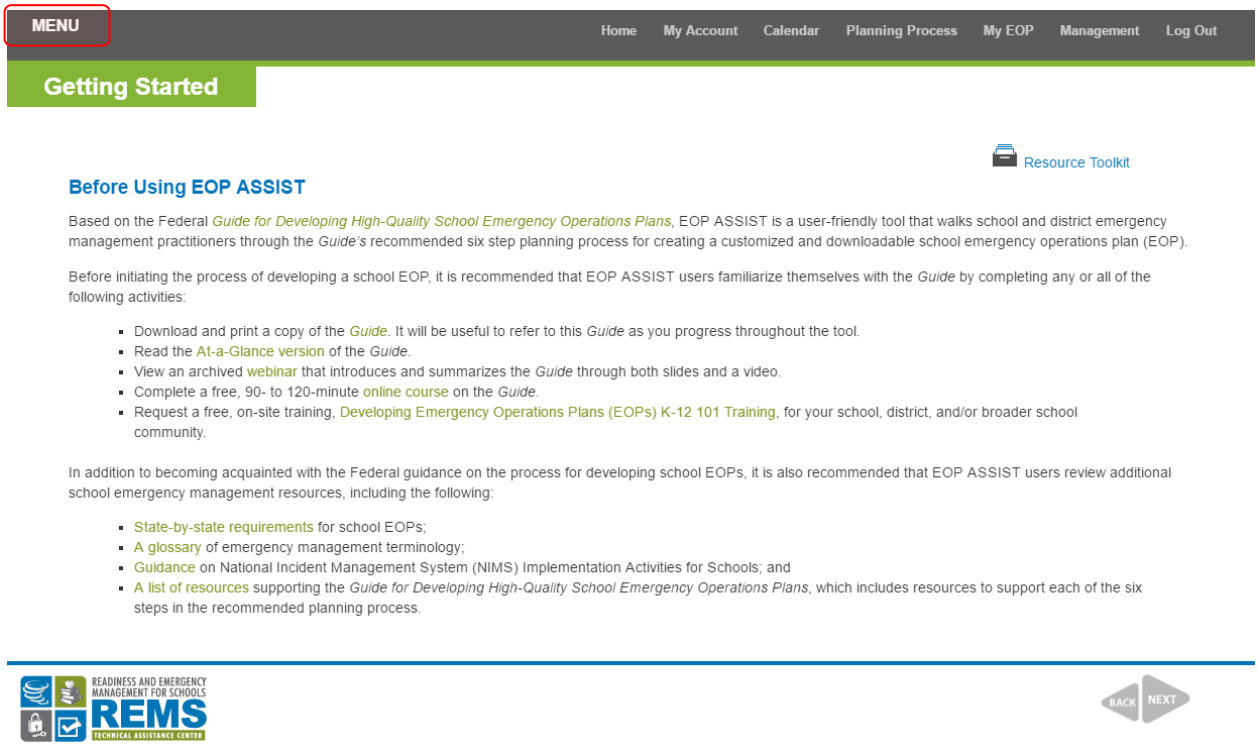


To use the Navigation Bar, click on the link for the section to which you wish to navigate. Please note that the Home/Getting Started and Planning Process sections contain multiple pages. This will require additional navigation, which is detailed in the following subsections. The other sections in the application only contain one page, which will appear when clicking on the link to that section from the Navigation Bar.

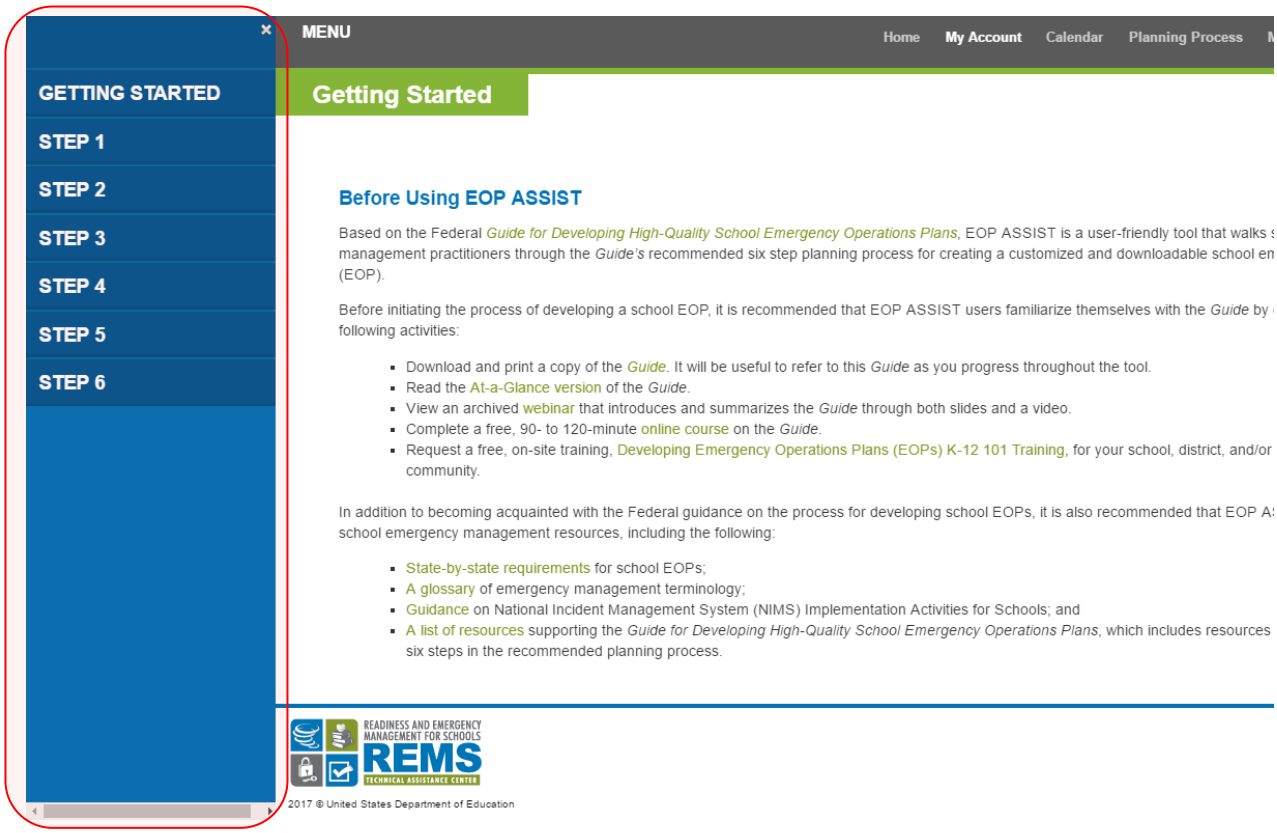
Please note: *If your User Role is State Administrator, District Administrator, or School Administrator, you also will see Management in your Navigation Bar. This is described in more detail in Chapter 6. If you are seeking additional information on specific sections featured on the Navigation Bar, please see Chapter 5.*

Slide-Out Menu

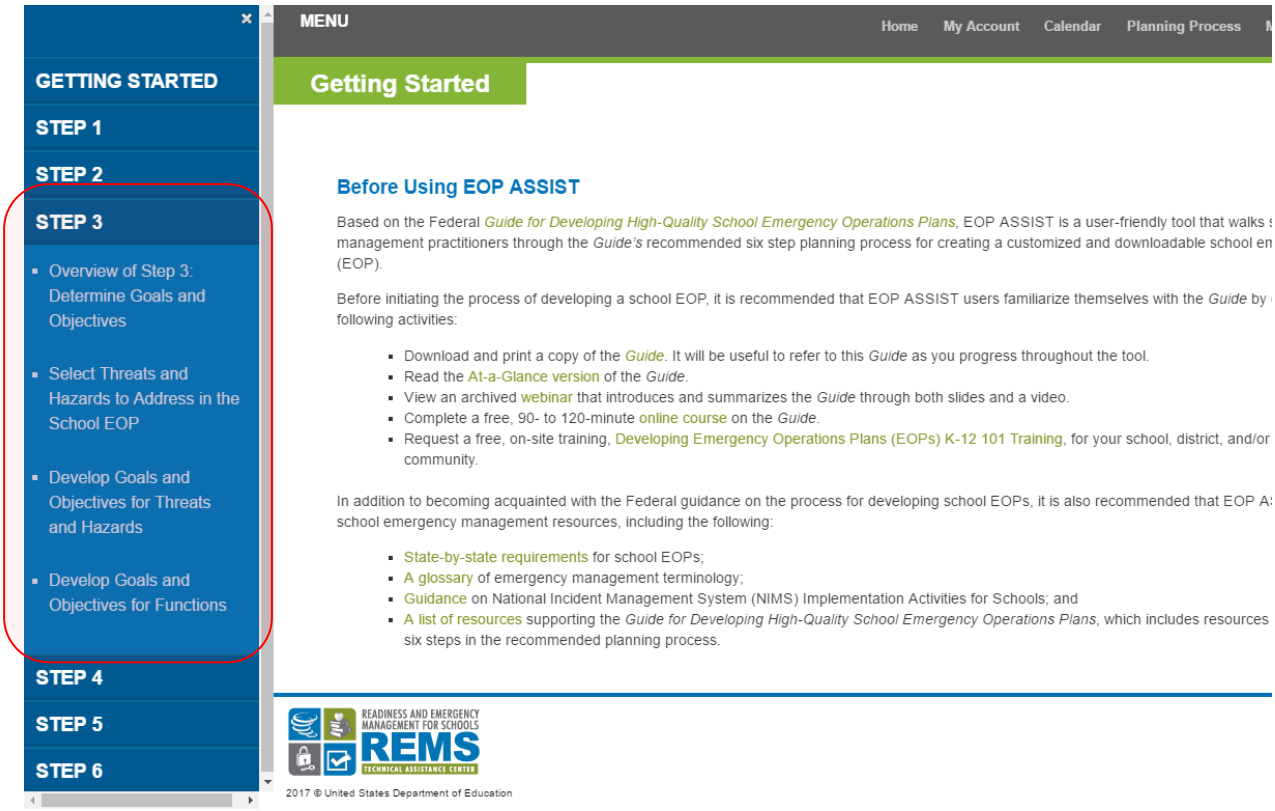
On the left-hand side of the dark gray ribbon, there is a Menu icon in white text and ALL CAPS. This Menu icon opens the Slide-Out Menu, which lets users navigate directly to any page within the Home/Getting Started and Planning Process sections. The Federal Government's recommended process for developing a high-quality school EOP involves six steps, and the Planning Process section is structured according to those steps. The Slide-Out Menu lets users quickly access any of those six steps, or to view any page within a particular step. Additionally, each of the three pages in the Home/Getting Started section is also listed on the Slide-Out Menu. This feature is helpful if users want to skip around between sections, rather than navigating from page to page in consecutive order.



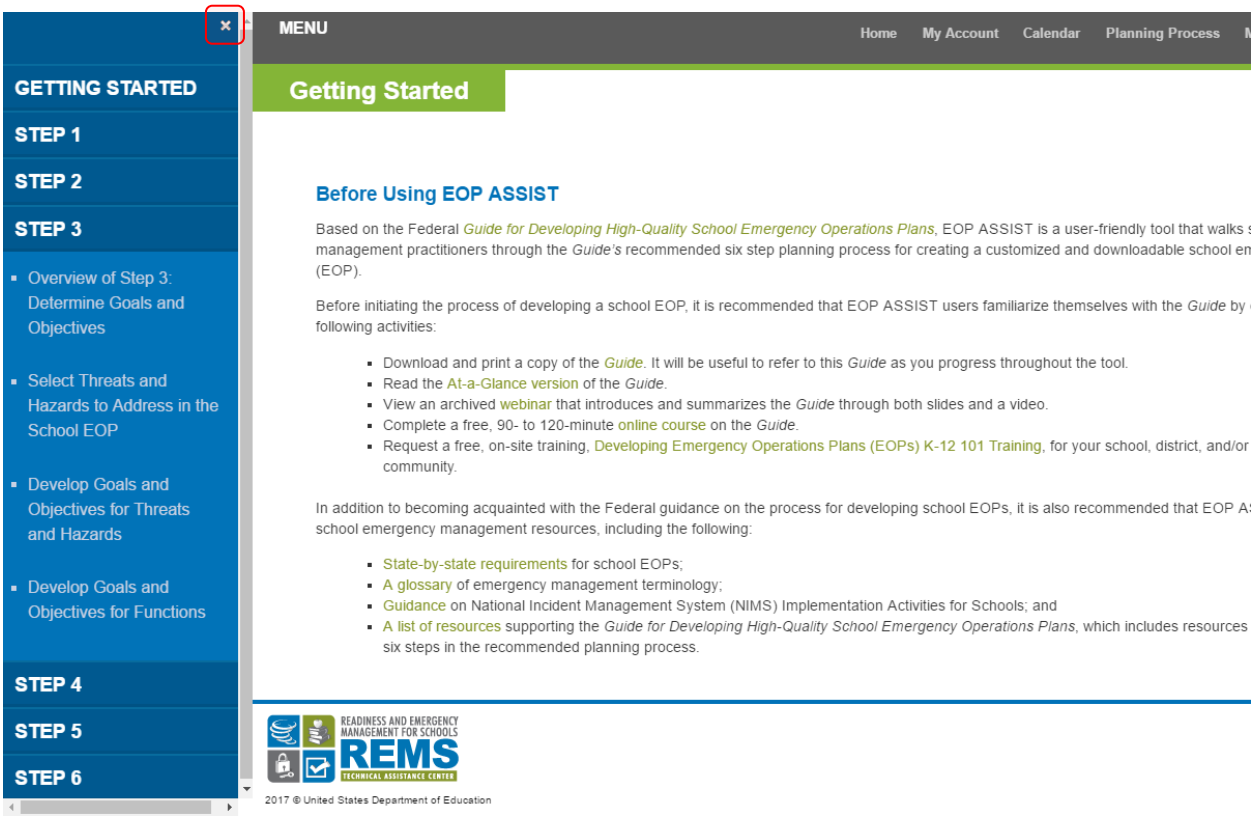
To use this feature, start by clicking the Menu icon. The Slide-Out Menu will appear on the left-hand side of the screen, with a list of each of the six steps and Getting Started.



When you click on a step or Getting Started, each page that exists within that step will appear underneath and in consecutive order in the Slide-Out Menu. When you select the desired page, the Slide-Out Menu will close and the page that you selected will appear on your screen.



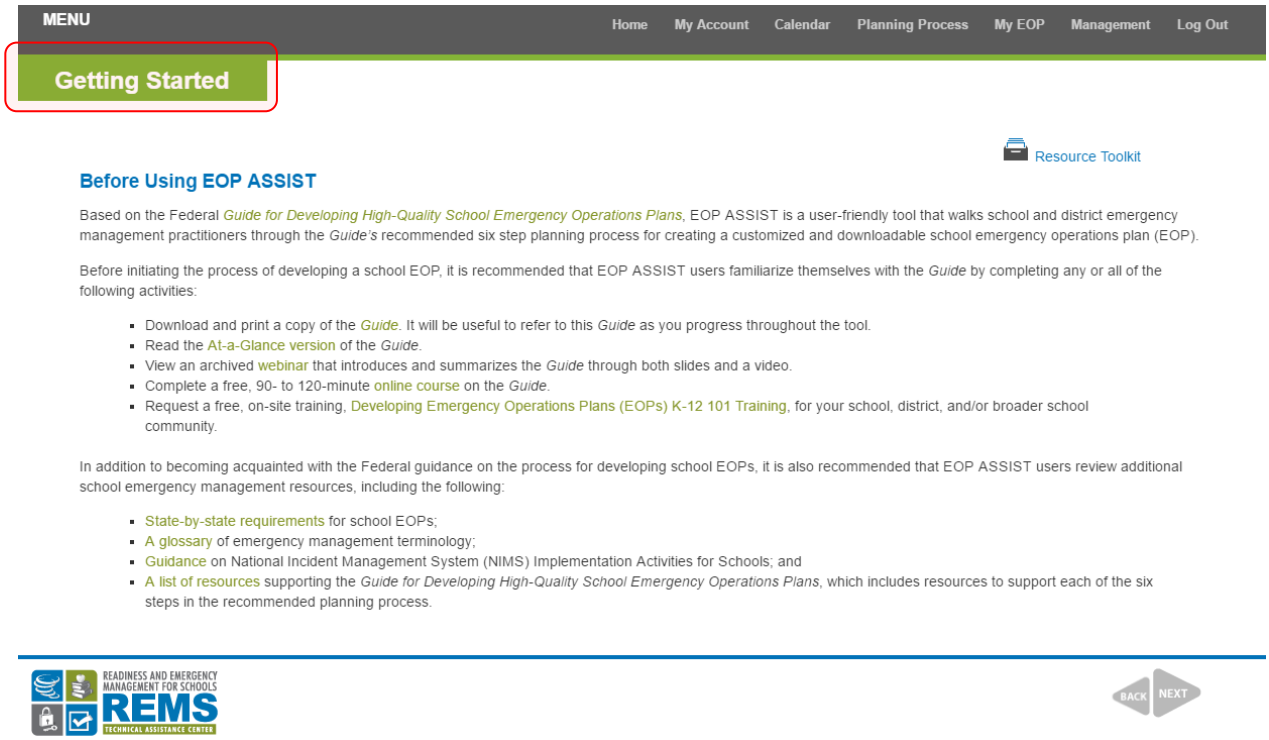
To exit the Slide-Out Menu at any time without navigating to another screen, click the X or Cancel icon in the top right-hand side of the Slide-Out Menu.



Please note: *For more information on moving through the Home/Getting Started or the Planning Process sections, please see* *Chapter 5*.

Section Heading

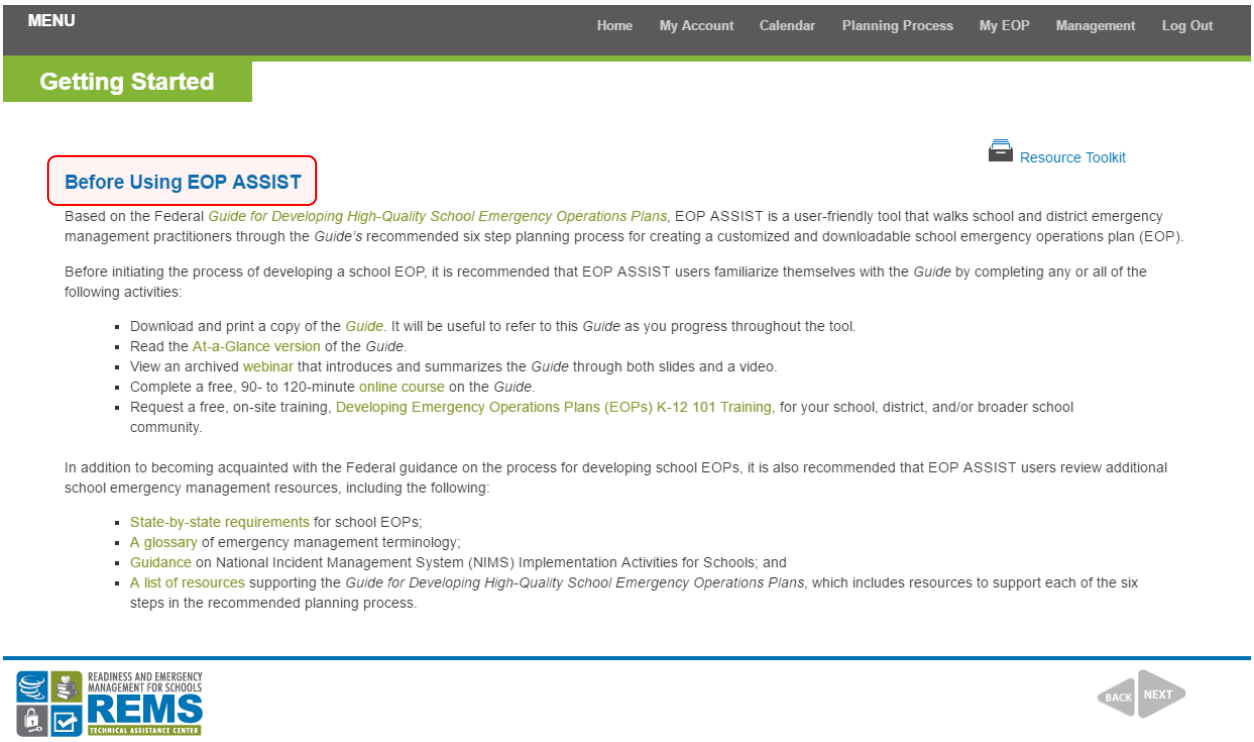
Underneath the Navigation Bar on the left-hand side is a green block with white text. This is the Section Heading, which shows the section that you are in.



Page Title

Each section contains one page, with the exception of Home/Getting Started and the Planning Process sections. The Home/Getting Started section consists of three pages, while the Planning Process section contains 25 pages, divided over six steps.

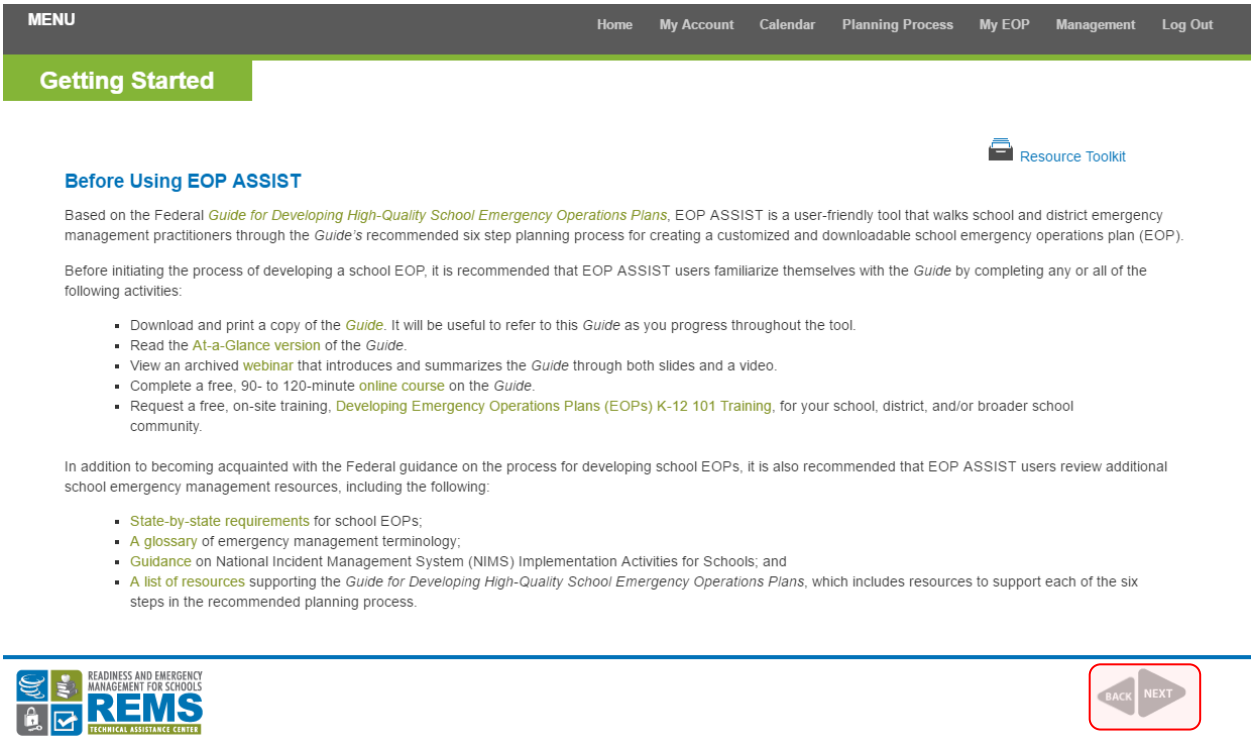
Underneath the Section Heading, the Page Title is written in large blue text. The Page Title shows the page that you are on, plus the subject matter of that page. The Page Title corresponds to the name of the page in the Slide-Out Menu.



Please note: *The majority of the app's content is located within the Planning Process section. For a more detailed list or visual display of the app's information architecture, please refer to Appendix B.*

Next/Back Buttons

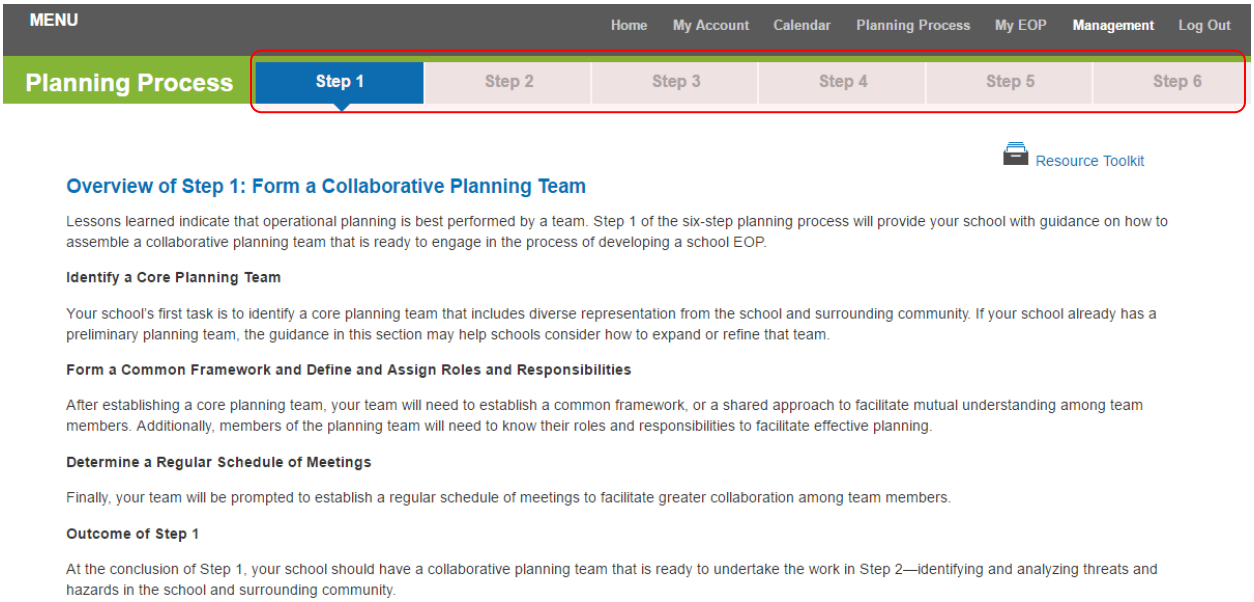
To navigate within the Home/Getting Started and Planning Process sections of EOP ASSIST, use the arrow buttons that say “Next” and “Back.” These buttons are located in the bottom right-hand corner of each page. The buttons allow users move through the application, both forwards and backwards, page by page.



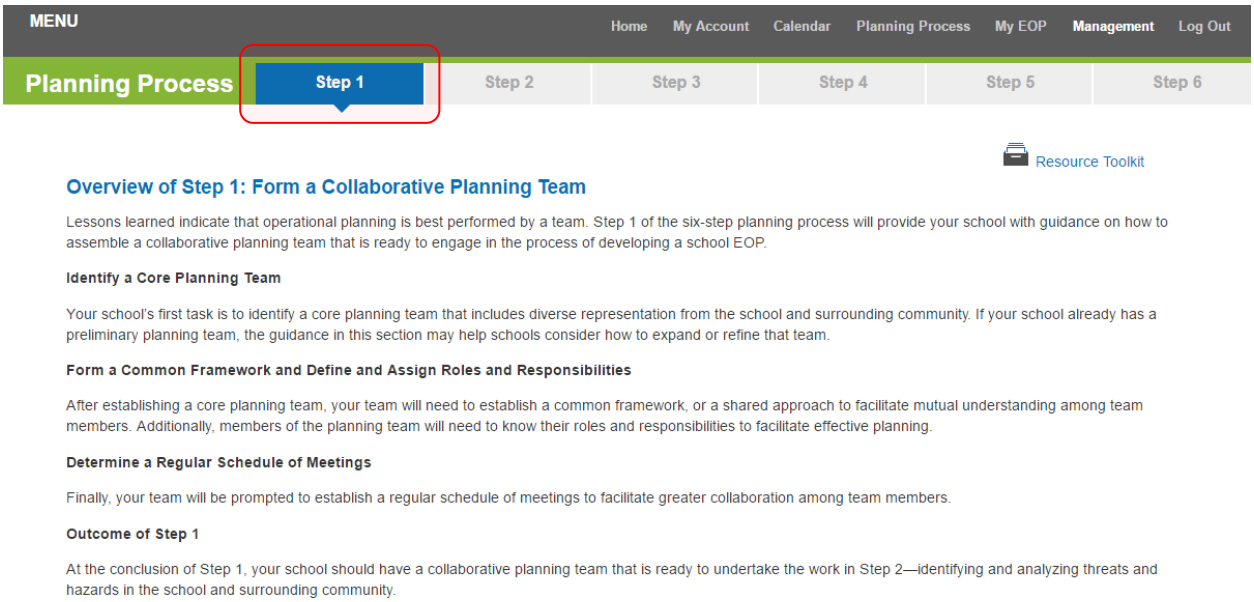
To use this feature, click on the button that describes the direction in that you wish to move. To navigate forward in the application, please click the Next button, and to navigate backward, please click the Back button.

Planning Process Tabs

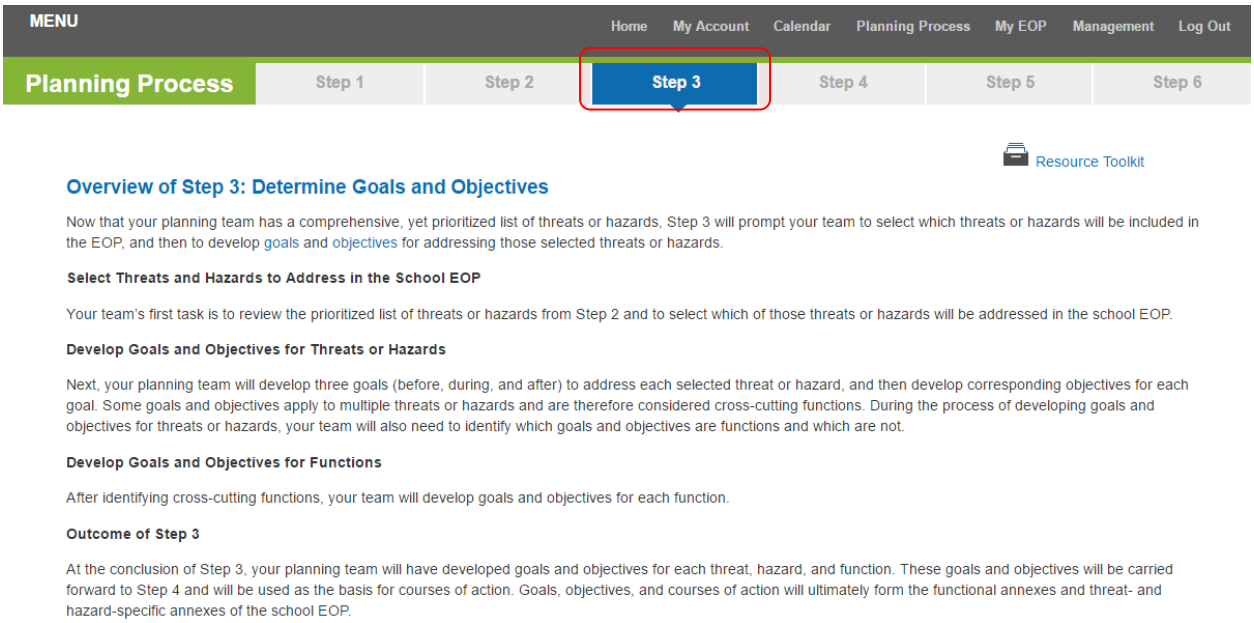
Once you have navigated to the Planning Process section, either through the Navigation Bar or the Slide-Out Menu, a bar of five gray boxes and one blue box will appear underneath the Navigation Bar and to the right of the Section Heading. These are the Planning Process tabs, which show the step you are in, and let you navigate between steps in the Planning Process section.



The step highlighted by a filled blue box indicates your present location within the Planning Process section, while the remaining gray boxes display the other steps that you are not working on. In the screen below, the Planning Process tabs show that you are currently working in Step 1 of the Planning Process section.



To jump to another step, click on the tab that shows the step you want. You will see the first page, or overview, of the step that you selected. The tab for the step that you clicked on will turn blue, and the tab for the step you just visited will turn gray. In the screen below, the Planning Process tabs show that you have jumped to Step 3 of the Planning Process section.

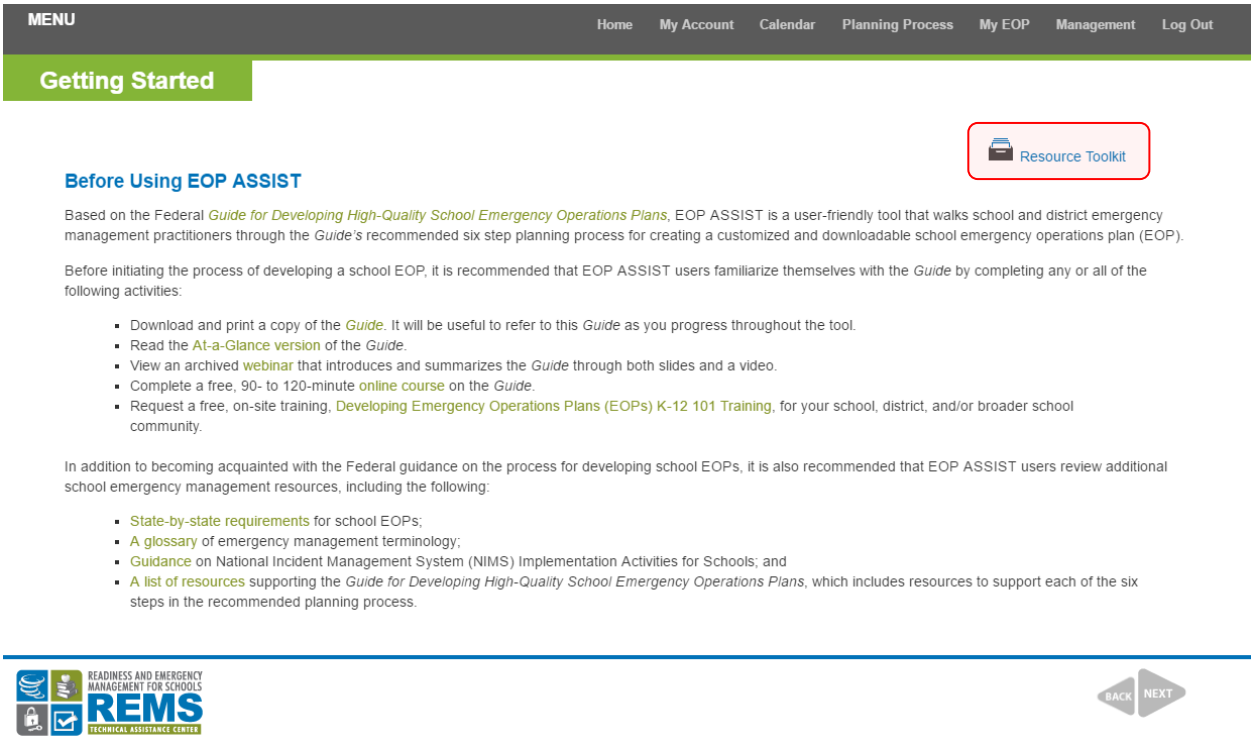


You can also use the Planning Process tabs to return to the first page of the step that you are viewing. When you click on the blue tab for the step that you are working in, your screen will return to the first page of that step, and the tab will remain blue.

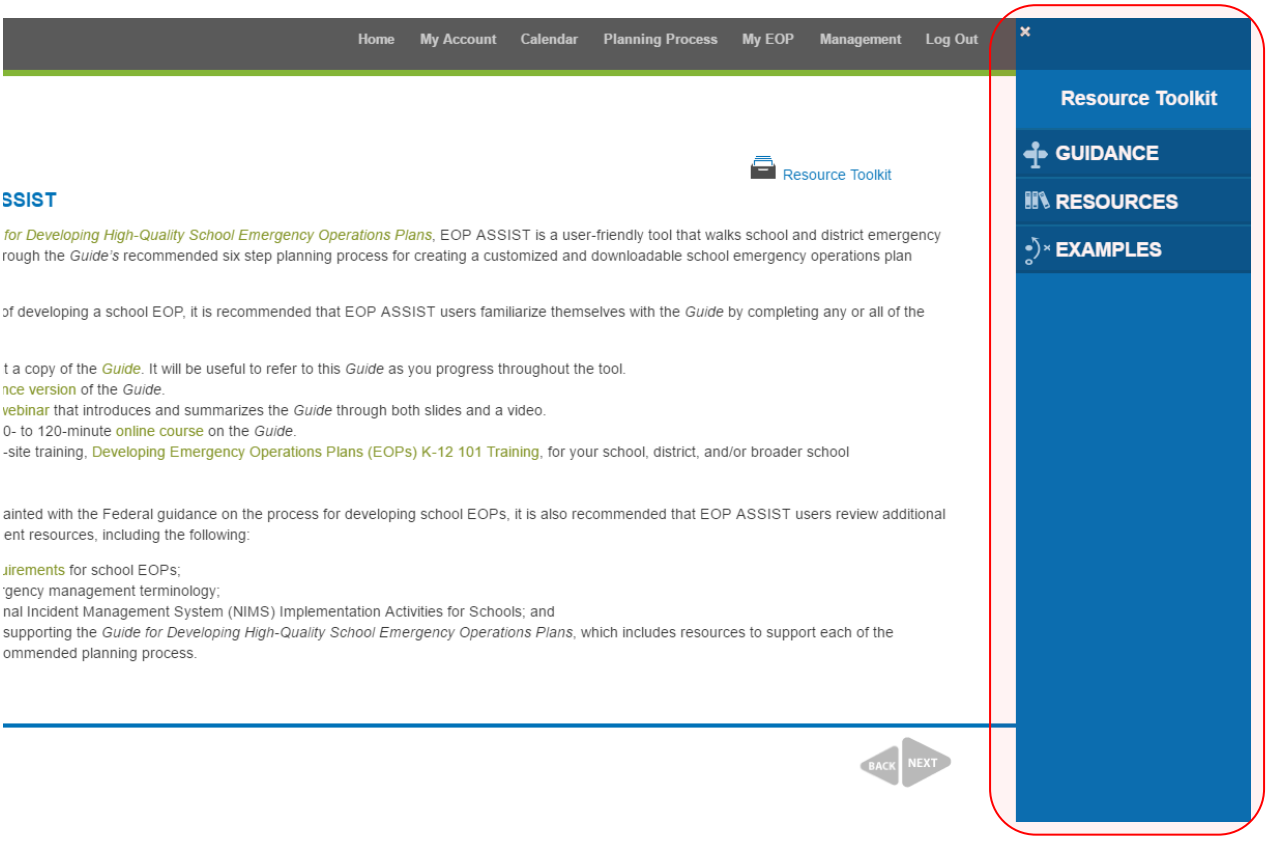
Please note: *For more information on moving through the Planning Process section, please see* *Chapter 5*.

Resource Toolkit

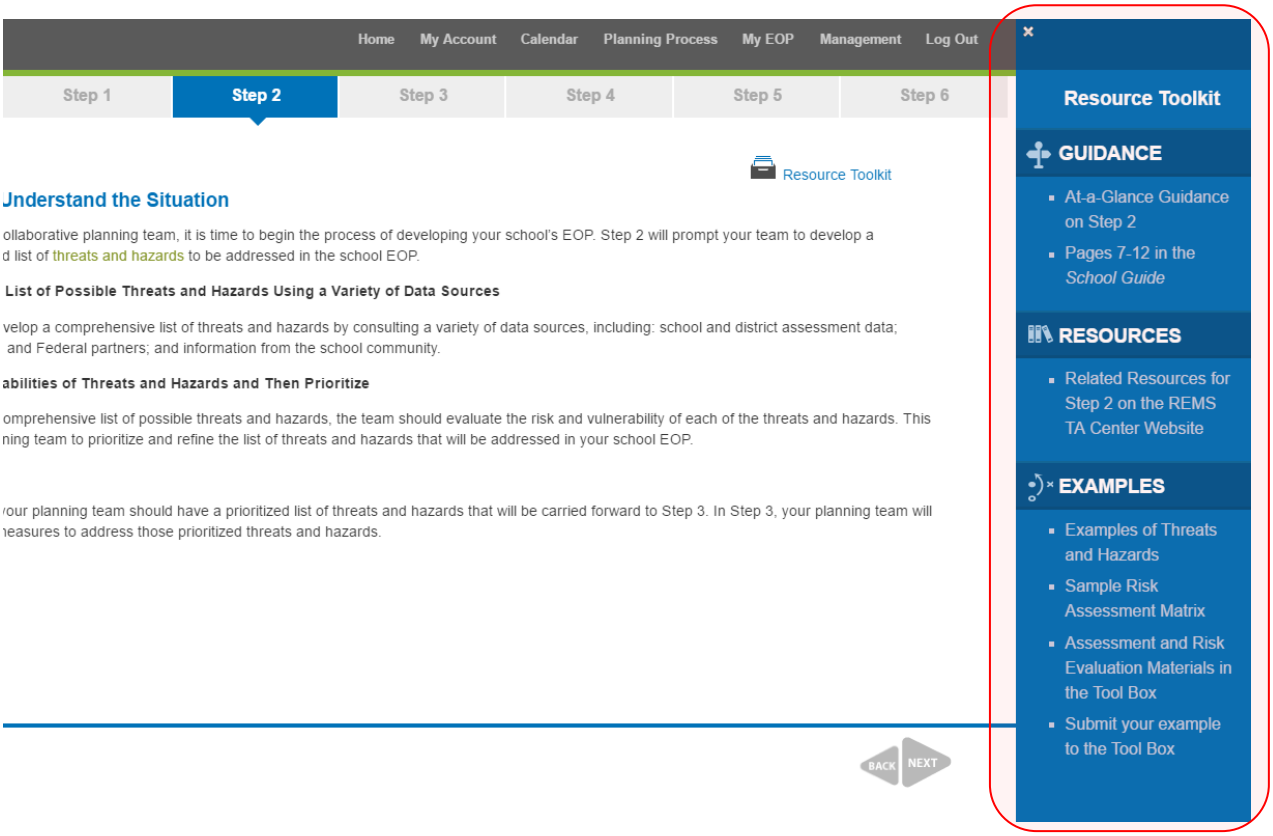
Within the Home/Getting Started and Planning Process sections, you may find a file cabinet icon on the right-hand side of the screen. This is the Resource Toolkit, a feature containing additional guidance, resources, and examples to support your progress through EOP ASSIST. The Resource Toolkit is page-specific. In other words, the resources included on one page are customized to that page. Once a user navigates to a different page, the contents of the Resource Toolkit will change to reflect the new page.



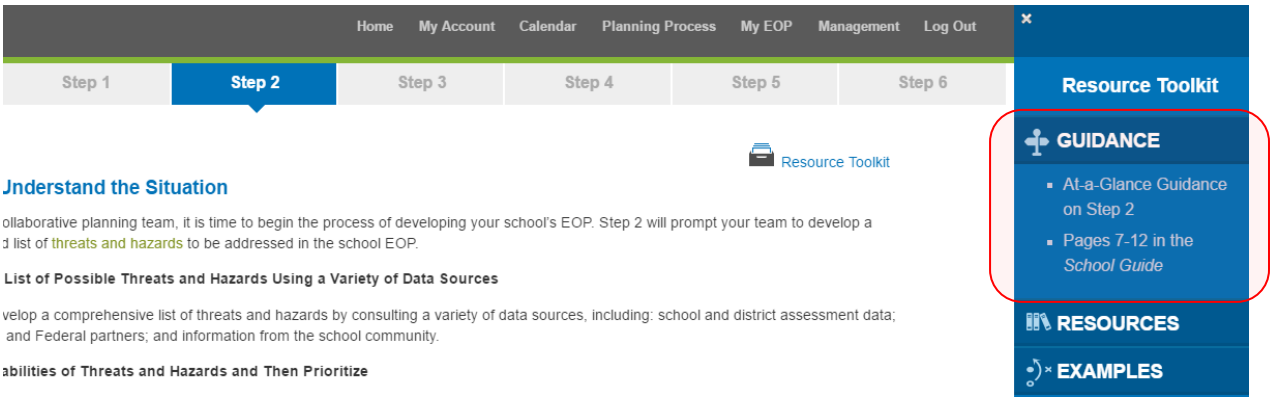
To use this feature, select the Resource Toolkit icon. A blue panel will appear on the right-hand side of the screen, which is the Resource Toolkit menu. This menu includes guidance, resources, and examples to support your completion of a particular step.



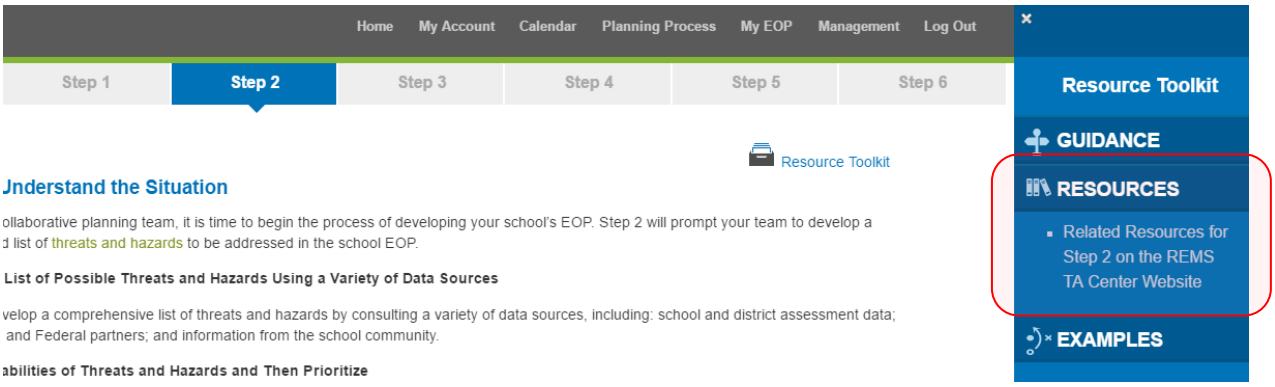
When you click on any of the three options, a list of links for different materials will appear underneath the selected option(s). If no resources for a given category appear, then there are no resources for that category on that particular page. Many of the pages come pre-loaded with guidance, resources, and examples from the REMS TA Center. These can never be removed from the Resource Toolkit. Institutions hosting EOP ASSIST, however, do have the option to add state-specific and/or local-specific guidance, resources, or examples to appear in the Resource Toolkit also. Information on how Super Administrators can add to the Resource Toolkit may be found in Chapter 6.



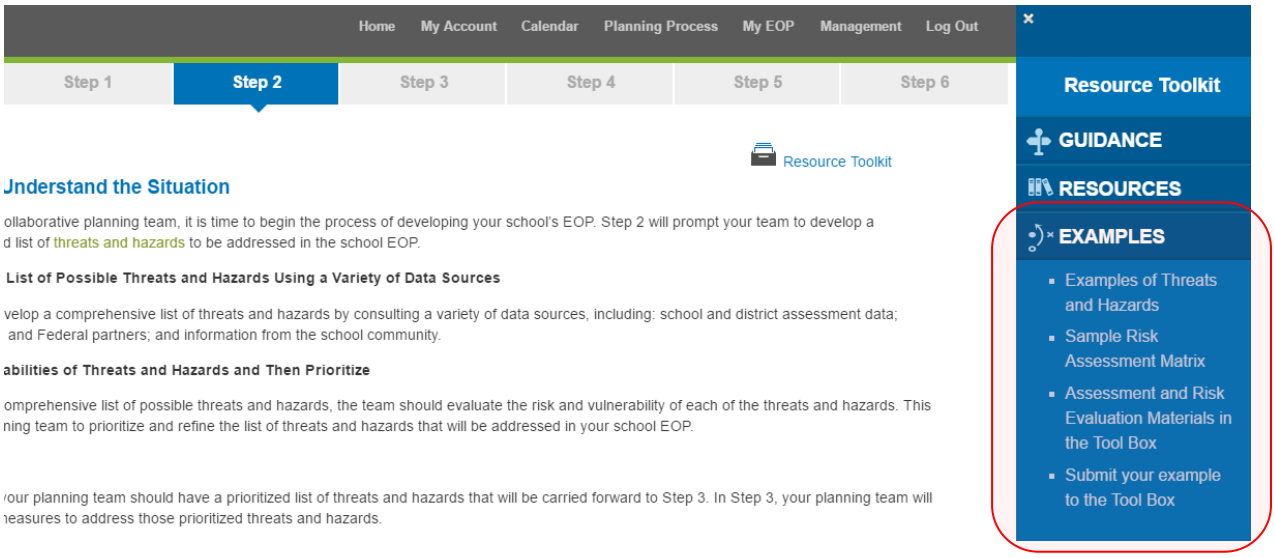
The **Guidance** section of the Resource Toolkit contains recommendations and laws from government agencies and other organizations on school emergency management planning. This includes references to or sections of the *School Guide*, including the At-a-Glance version on the REMS TA Center Website.



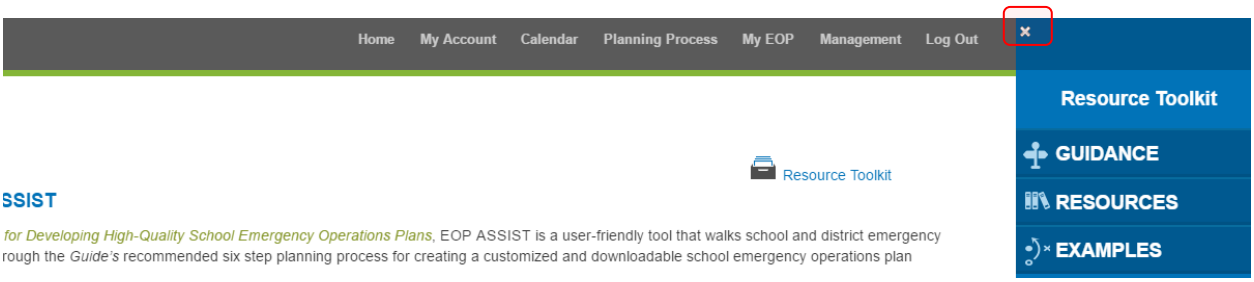
The **Resources** section of the Resource Toolkit contains tools, documents, online courses, and training materials that provide supplemental information on specific topics. This includes publications, online courses, archived Webinars, downloadable training packages, in-person Trainings by Request, and Webpages developed by the REMS TA Center and Federal agencies.



The **Examples** section of the Resource Toolkit contains the tangible result and product of emergency management planning work. This includes sample goals and objectives, sample courses of action, sample annexes, sample assessments, and other resources found in the REMS TA Center Tool Box.



Select the guidance, resource, or example that you would like to use. When you click on a particular link, it will open in a new tab—either as a Webpage or as a PDF document. To exit the menu, click on the X icon in the upper right corner of the Resource Toolkit menu, or anywhere on the main portion of the screen.



***Please note**: EOP ASSIST 3.0 allows institutions to upload resources that are specific to their state, region, or district to the Resource Toolkit. In state-level hosting, the Super Administrator, State Administrators, and District Administrators may add resources to the Resource Toolkit. In district-level hosting, the Super Administrator and District Administrators may add resources to the Resource Toolkit. In school-level hosting, the Super Administrator only may add resources to the Resource Toolkit. For information on how to add resources to the Resource Toolkit, please see Chapter 2 and Chapter 6.*

User Roles

There are five possible User Roles available in EOP ASSIST: the Super Administrator, State Administrators, District Administrators, School Administrators, and School Users. These user roles are available depending on the level of hosting that an institution has set up, and have the following roles and responsibilities.

Super Administrator

The Super Administrator is typically IT personnel at the institution hosting EOP ASSIST who install the application and support the overall management of the application. They serve as the primary point of contact for State Administrators in state-level hosting, District Administrators in district-level hosting, and School Administrators in school-level hosting. Initial responsibilities include setting up the institution's account and creating user accounts for practitioners at the institution. More information on the initial responsibilities of the Super Administrator may be found in Chapter 2, how to complete the initial responsibilities may be found in the *EOP ASSIST 3.0 Installation Manual*, and overall management features may be found in Chapter 6. At least three IT personnel at the institution hosting the EOP ASSIST should have access to the log-in credentials for this user account.

State Administrator

State Administrators are typically school emergency management practitioners at a state agency or REA, and are largely responsible for overseeing the use of EOP ASSIST by districts and schools throughout their state or region. They serve as the primary point of contact for District Administrators and School Administrators at independent schools. State Administrators may use the application to develop a sample school EOP; develop statewide threats, hazards, functions, goals, and objectives; coordinate state-level planning meetings and activities; and directly view or review school EOPs for schools, if this two-door sharing feature is enabled by all of the required parties. More information on the initial responsibilities of State Administrators may be found in Chapter 2, and their overall management capabilities may be found in Chapter 6. The Incident Command System (ICS) recommends having at least one designated individual and two backup personnel for each essential position. As such, it is recommended that there are at least three State Administrators for each state hosting EOP ASSIST.

District Administrator

District Administrators are typically school emergency management practitioners at a district office and are largely responsible for overseeing the use of EOP ASSIST by their district and schools throughout their district. They serve as the primary point of contact for School Administrators. District Administrators may use the application to develop district-wide threats, hazards, functions, goals, and objectives; oversee school-level planning meetings and activities; directly review or view school EOPs for schools; and contribute to individual school EOPs, as they serve as important members of the collaborative planning team. More information on the initial responsibilities of District Administrators may be found in Chapter 2, and overall management features may be found in Chapter 6. ICS recommends having at least one designated individual and two backup personnel for each essential position. As such, it is recommended that there are at least three District Administrators for each district using EOP ASSIST.

School Administrator

School Administrators are typically school emergency management practitioners with a leadership role on their collaborative planning team. They serve as the primary point of contact for School Users. School Administrators may use the application to develop, review, and review their school EOP, and coordinate school-level planning meetings and activities. More information on the initial responsibilities of School Administrators may be found in Chapter 2 and their overall management capabilities may be found in Chapter 6. The ICS recommends having at least one designated individual and two back-up personnel for each essential position. As such, it is recommended that there are at least three School Administrator user accounts for each school using EOP ASSIST.

School User

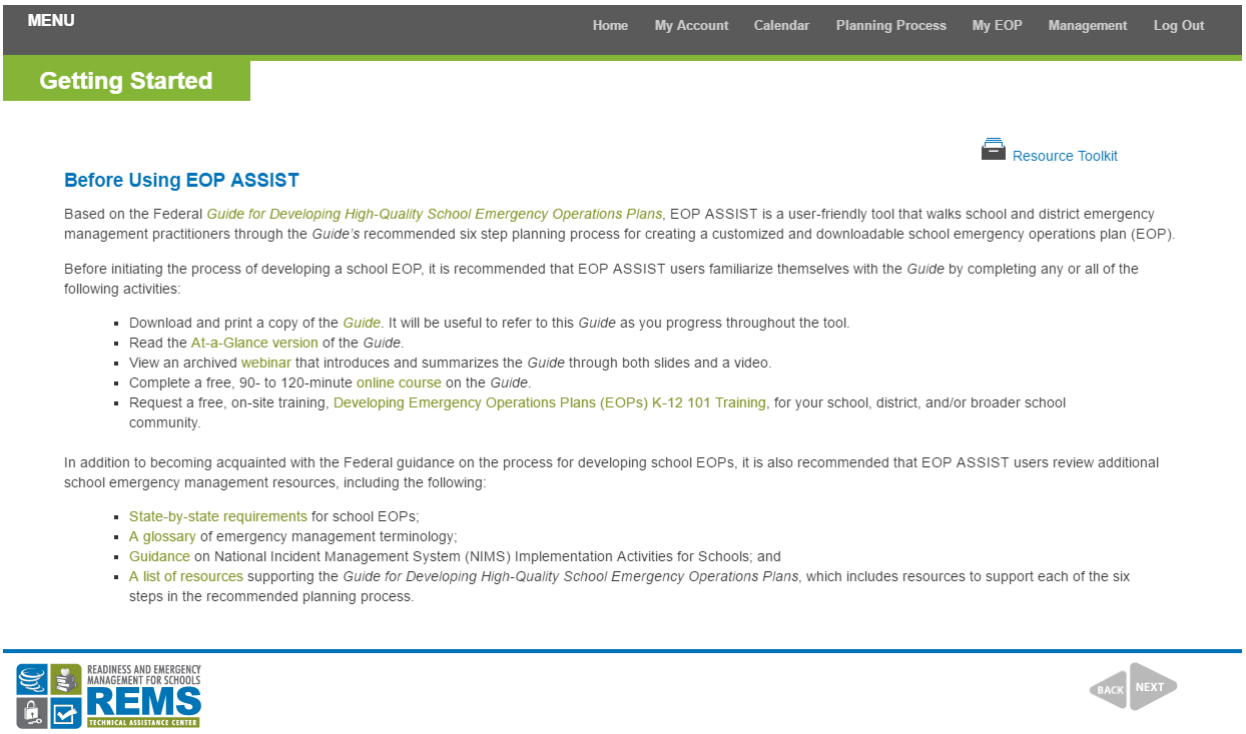
School Users are typically school emergency management practitioners who serve on the collaborative planning team, but do not have a leadership role. Most users will have this user role. School Users may use the application to develop, revise, and review their school EOP, and coordinate school-level planning meetings. It is possible for School Users to have View-Only permissions, which allows emergency practitioners to view the school EOP without having the ability to edit it. School Users have no initial responsibilities or management capabilities.

Chapter 5: School EOP Development

EOP ASSIST was designed to walk school EOP planning team members through the recommended six-step planning process for developing a high-quality school EOP and to ultimately generate a school EOP based on that process. Most of the app's functions related to these objectives occur within the Planning Process, Calendar, and My EOP sections of the application. These interactive sections support users with guidance and tools at each step of the way, and let users save, edit, and transfer school EOP data among the planning team. This chapter will provide further detail about how to use these sections to develop a school EOP.

Home

Each time you log in to EOP ASSIST, you will be presented with the Home screen, which is the first page of the Home/Getting Started section. It is imperative that you review the information provided in this section each time you use EOP ASSIST, as it informed the design of the application.

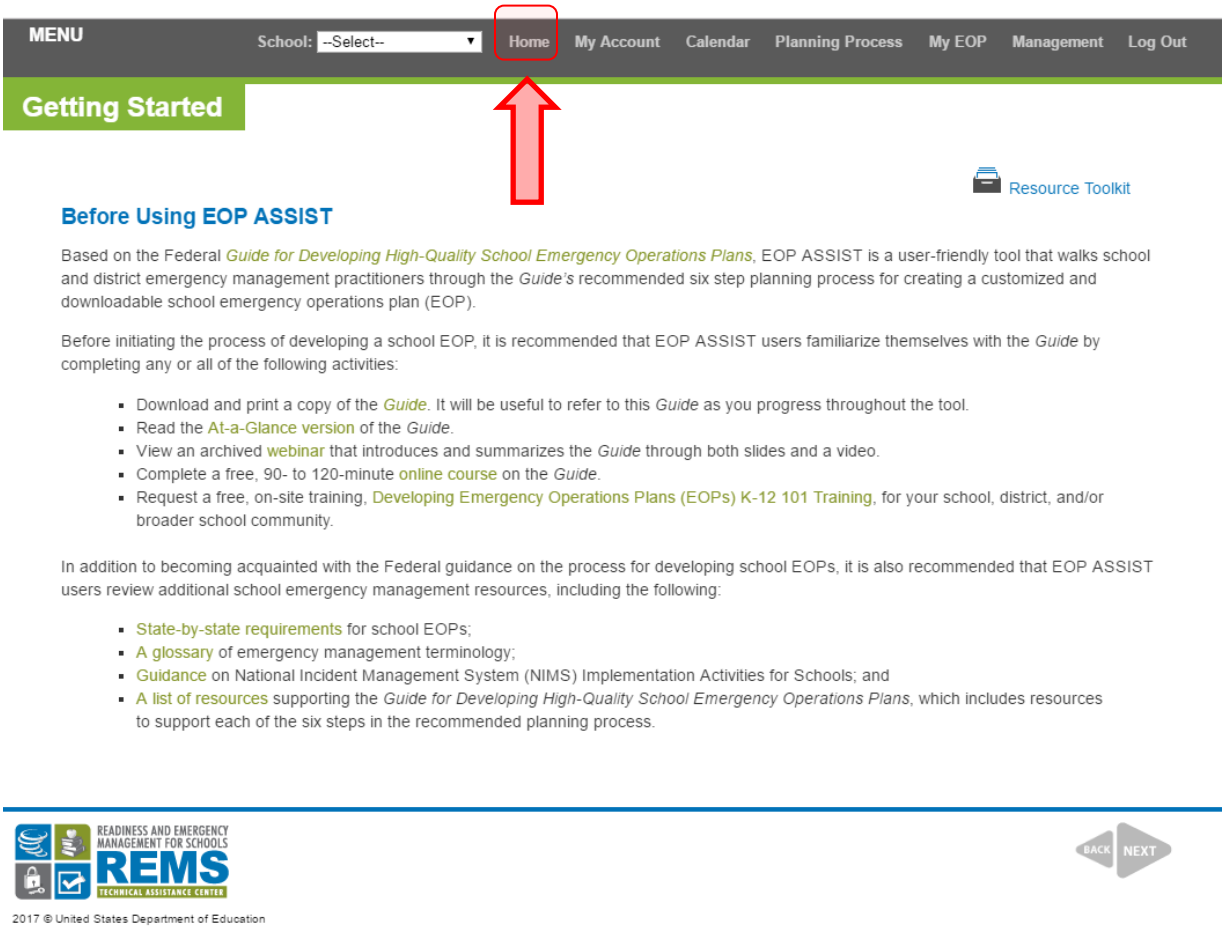


Explore each of the links, which provide you with direct access to the *School Guide* on which EOP ASSIST is based, as well as other online resources and information on the six-step planning process from Federal agencies and the REMS TA Center. Below is a list of all links that are available in the Home/Getting Started section, with a brief description of their contents and purpose.

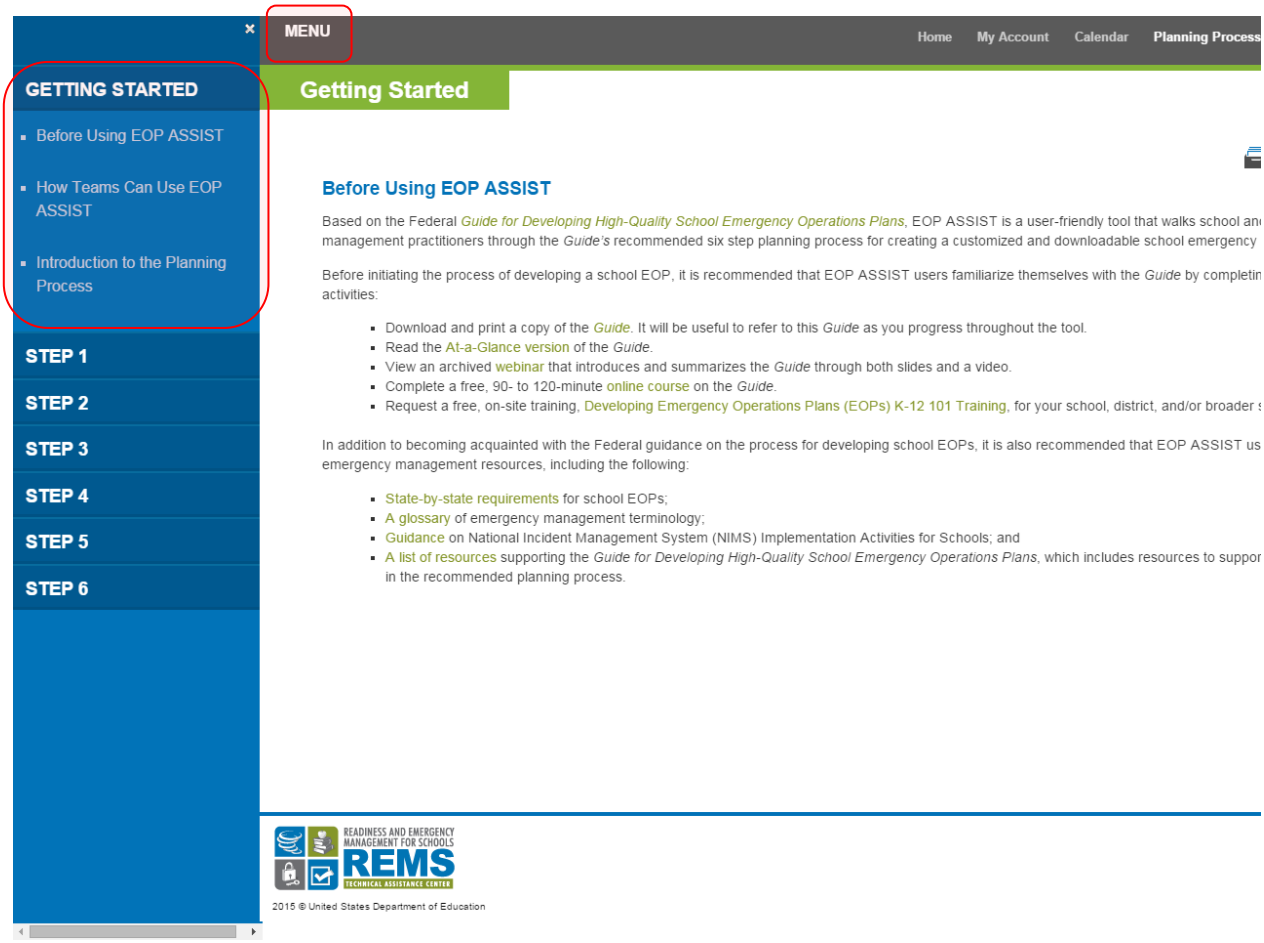
Resources	Description
Guide for Developing High-Quality School Emergency Operations Plans	This Web page provides information on and access to the *School Guide*, which contains information on each of the six steps and planning principles for developing a high-quality school EOP.
At-a-Glance Version of the *School Guide*	This section of the REMS TA Center Website is an HTML version of the *School Guide,* and contains information on each of the six steps and planning principles for developing a high-quality school EOP.
An Overview of the *School Guide* Webinar	This archived Webinar was presented by representatives from multiple Federal agencies and provides information on the *School Guide,* including each of the six steps and planning principles for developing a high-quality school EOP.
Developing EOPs 101 Online Course	This online course supports users in developing a high-quality school EOP and introduced introduces the planning process.
Developing EOPs K-12 101 Training by Request	This Web page provides information on all of the REMS TA Center's free, in-person Trainings by Request, including how to request a training and the additional training topics offered.
State Emergency Management Resources	This interactive infographic on the REMS TA Center Website compiles state requirements and contains state-level information related to school safety and school emergency management.
Glossary of Emergency Management Terminology	This publication contains information on key terms commonly used by practitioners in the field of school emergency management.
Guidance on National Incident Management System (NIMS) Implementation Activities for Schools	Overview of Federal guidance for implementing NIMS. This Web page on the REMS TA Center Website contains additional NIMS resources.
***School Guide* Resource Guide**	This publication contains resources from Federal agencies that support the *School Guide*.
Planning Principles	This Web page, adapted from the *School Guide,* contains information on the planning principles that are important in developing a comprehensive school EOP, as well as related resources that support their application.
Principles for Creating a High-Quality School EOP	This *REMSExpress* publication contains information on the planning principles that are important in developing a comprehensive school EOP.
Six-Step Planning Process	This Web page, adapted from the *School Guide,* contains information on each of the six steps for developing a high-quality school EOP.

K-12 Six-Step Planning Process	This *REMSExpress* publication contains information on each of the six steps for developing a high-quality school EOP.

To access this section at any time, click the Home button in the Navigation Bar. This will let you navigate to the first page within the Home/Getting Started section: Before Using EOP ASSIST.



You may also navigate to a specific page within this section by using the Slide-Out Menu. Select the Menu icon, which will activate the Slide-Out Menu. Next, select Getting Started, which will list each of the three pages by title. Select the page that you want to navigate. Your screen will switch to that page.

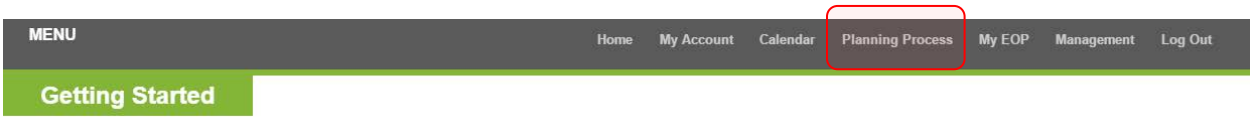


Please note: *For more information on using the Slide-Out Menu, please refer to* *Chapter 4*.

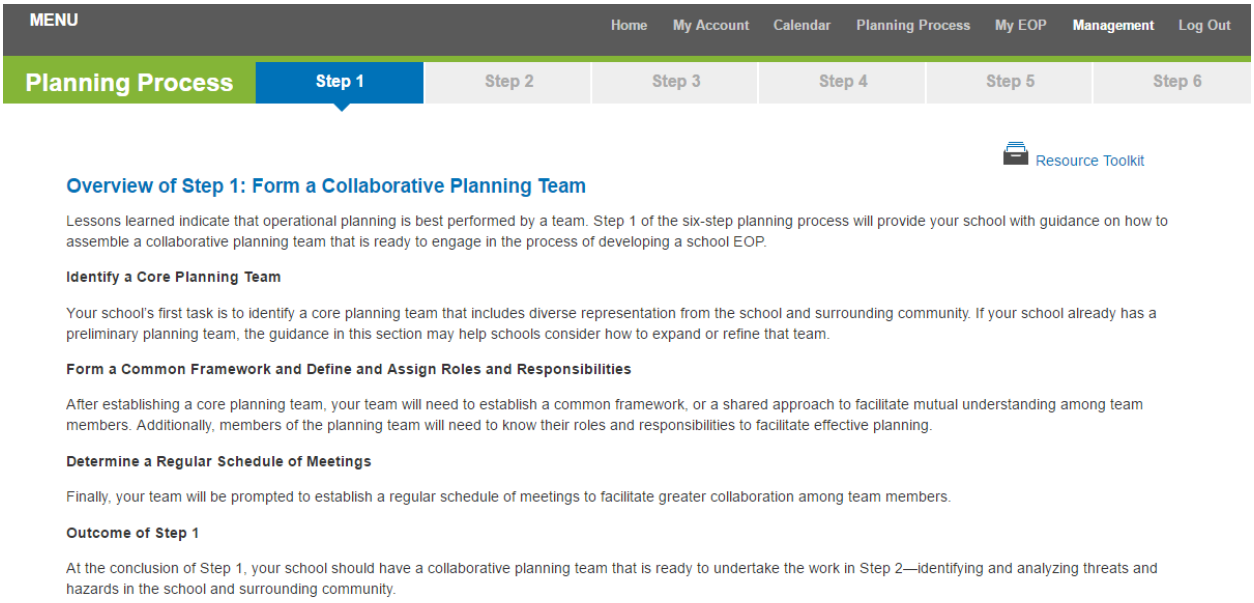
The Planning Process

The Planning Process section is where the bulk of the application is located, and it is where you enter and save data that will populate your school EOP. This section is located right after the Home/Getting Started section; you can arrive here by clicking the Next button or by selecting Planning Process in the Navigation Bar.

1. Select **Planning Process** in the Navigation Bar.



You will begin in Step 1, which is the beginning of the Planning Process, and progress through each of the six steps. When you reach the last page of Step 6 and click the Next button, you will be directed to the Home/Getting Started section again. This is because the six-step planning process is continuous and cyclical, and the completion of Step 6 initiates the planning cycle all over again. A high-quality school EOP requires continual evolution in order to meet the needs of the school and surrounding community.



Forms That Collect Data

As mentioned, the Planning Process section is where a school EOP is collected from planning team members. As you follow the directions and prompts on each page of the Planning Process section, you will come across a total of nine forms. The data from only eight of those forms are exported into the school EOP, which is depicted in the table below. We will review each form, based on its location within the six-step planning process. It is important for users to understand how data flow through the application, and eventually form the school EOP.

Step 2	•**Threats and Hazards**: Develop Comprehensive List
Step 3	•**Threats and Hazards**: Develop Goals and Objectives •**Functions**: Select Cross-Cutting While Develop Goals and Objectives for Threats and Hazards
Step 4	•**Threats and Hazards**: Develop Courses of Action •**Functions**: Develop Courses of Action
Step 5	•**Draft Basic Plan** •**Threats and Hazards**: Prepare Draft Threat- and Hazard-Specific Annexes •**Functions**: Prepare Draft Functional Annexes
My EOP	•**Basic Plan** •**Threats and Hazards**: Threat- and Hazard-Specific Annexes •**Functions**: Functional Annexes

Step 1: Form a Collaborative Planning Team

This is where you identify your collaborative planning team and document each team member's contact information and affiliation. Although this form is important in the planning process, the data saved in Step 1 do not appear anywhere else in the application or in the school EOP. Users may revisit this page throughout the planning process to access contact information for other members of the planning team, and may export this list into an Excel spreadsheet for offline access.

Create New Team Member

Please use the form below to identify members of your school's collaborative planning team as well as the stakeholder category or categories which they represent. If your school's planning team does not include sufficient representation from various stakeholder groups in the community (that may be involved in an emergency before, during, or after an incident), the core planning team may want to consider adding additional members to the collaborative planning team.

You will need to add each team member one by one into the form below. To add a team member into EOP ASSIST, please type that person's name and contact information into the corresponding fields and then check the appropriate boxes designating the stakeholder categories that the team member represents. You may check more than one box for each team member. Click the Save button to record information for each team member, and then repeat this process as many times as necessary to add all members of the planning team into EOP ASSIST.

Name:

Title:

Organization:

Email:

Phone:

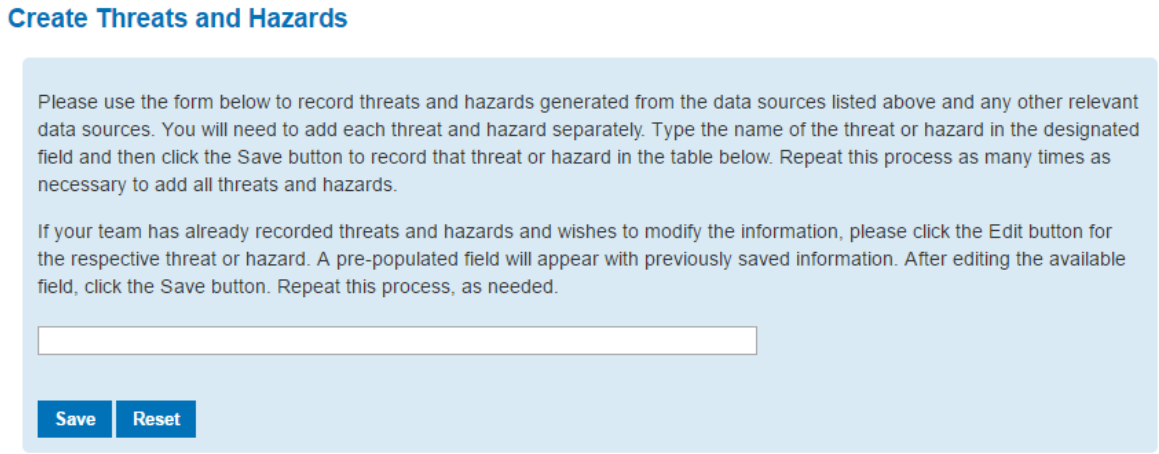
Stakeholder Category:

- School District/LEA
- School Community
- Diverse Interests of Whole School Community
- Local Community Partner
- State Department of Education/SEA
- State Community Partner
- Additional Partner

Save Reset

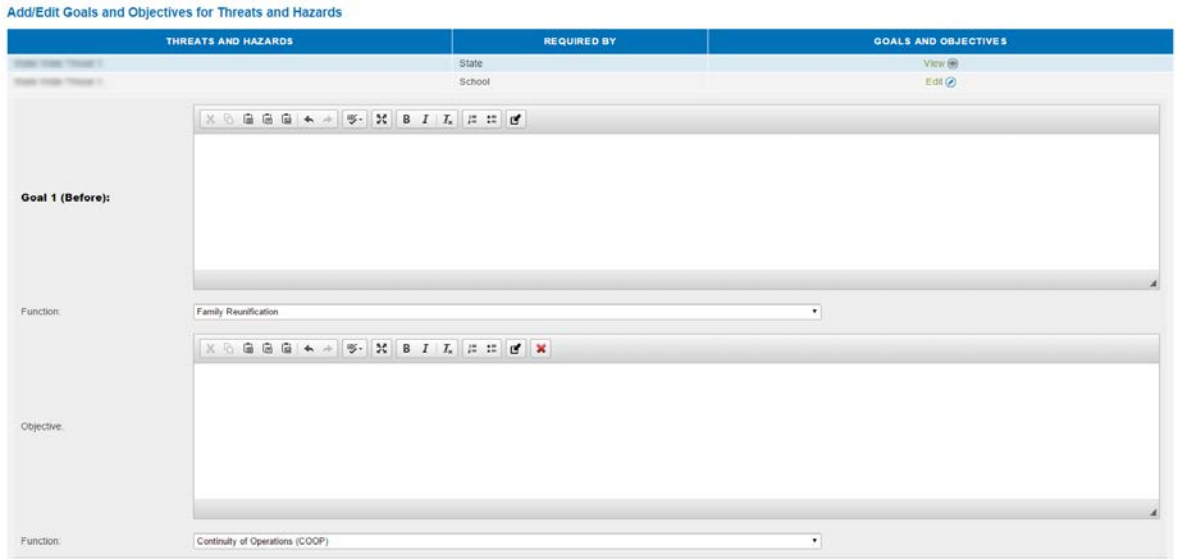
Step 2: Understand the Situation

This is where you identify threats and hazards that may be addressed in your school EOP. Data saved in Step 2 inform the data that are populated throughout the rest of the application; this is the basis of your threat- and hazard-specific annexes. Only the names of threats and hazards are collected here, so please return to this page if at any time you need to update the name of a threat or hazard.



Step 3: Determine Goals and Objectives

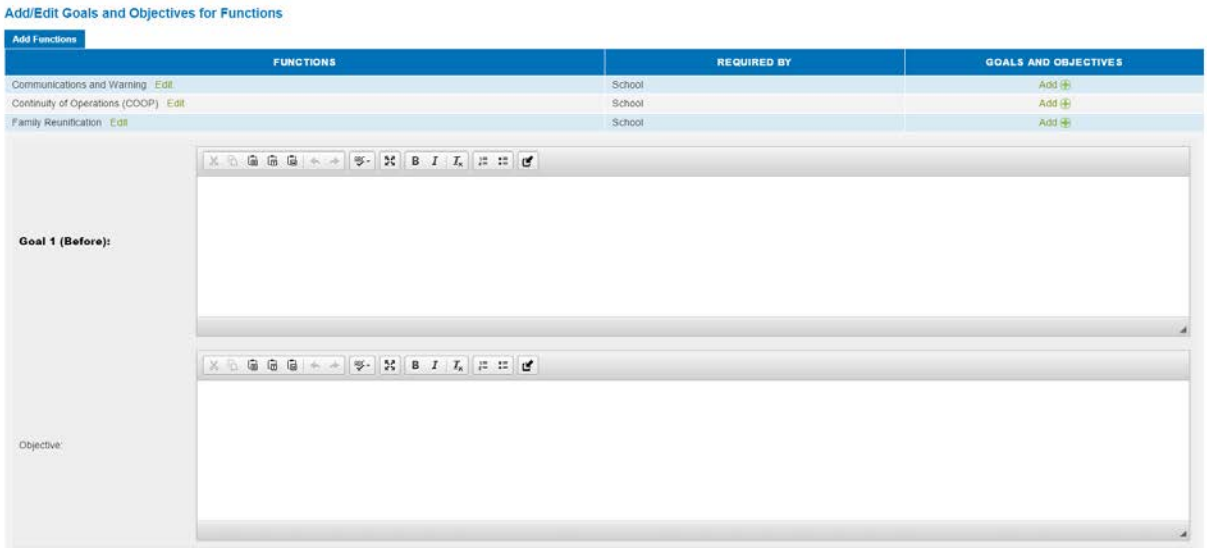
This is where you develop goals and objectives for the identified threats and hazards, which forms your threat- and hazard-specific annexes in your school EOP. Data saved in Step 2 pre-populate tables in Step 3. All threats and hazards created in Step 2 and selected in Step 3 will appear on the page "Develop Goals and Objectives for Threats and Hazards." Once data for all three goals and at least one objective for each goal have been added to a threat or hazard, all data associated with that threat or hazard will appear in Step 4.



As you develop goals and objectives for threats and hazards, you will be prompted to identify cross-cutting functions. These functions will then pre-populate the third table in Step 3, where users develop goals and objectives for functions.

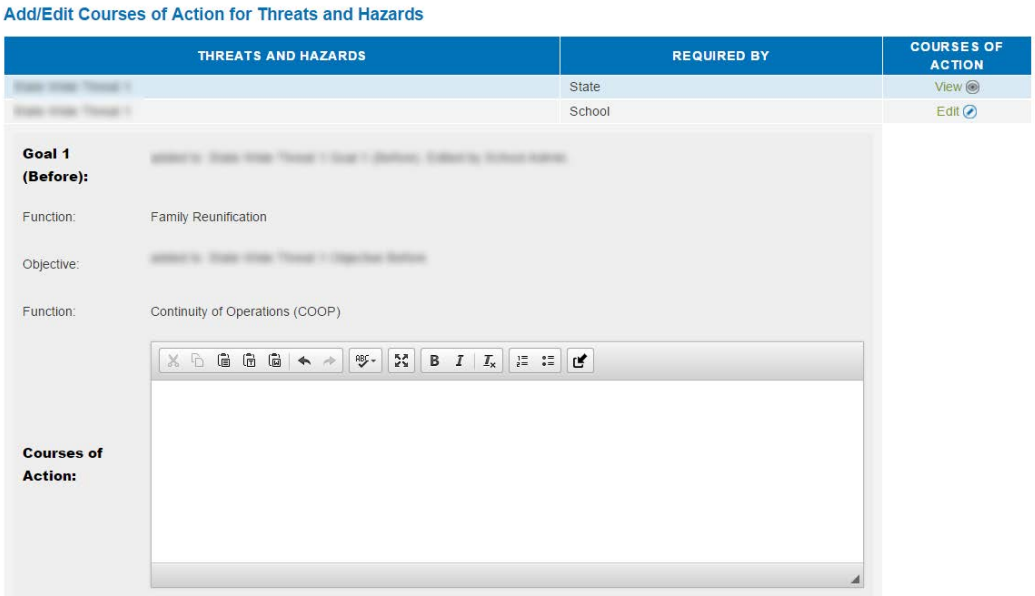
***Please note**: If your planning team has developed goals and objectives for a threat or hazard, but then de-selects that threat or hazard in the first form in Step 3, this threat or hazard will still appear in the Add/Edit Goals and Objectives for Threats and Hazards table. However, it will not be editable (as denoted by the View icon) or exported into the school EOP.*

This is also where you develop goals and objectives for the identified functions, which forms your functional annexes in your school EOP. All functions selected or created in Step 3 will appear on the page "Develop Goals and Objectives for Functions." Once data for all three goals and at least one objective for each goal have been added to a function, all data associated with that function will appear in Step 4.



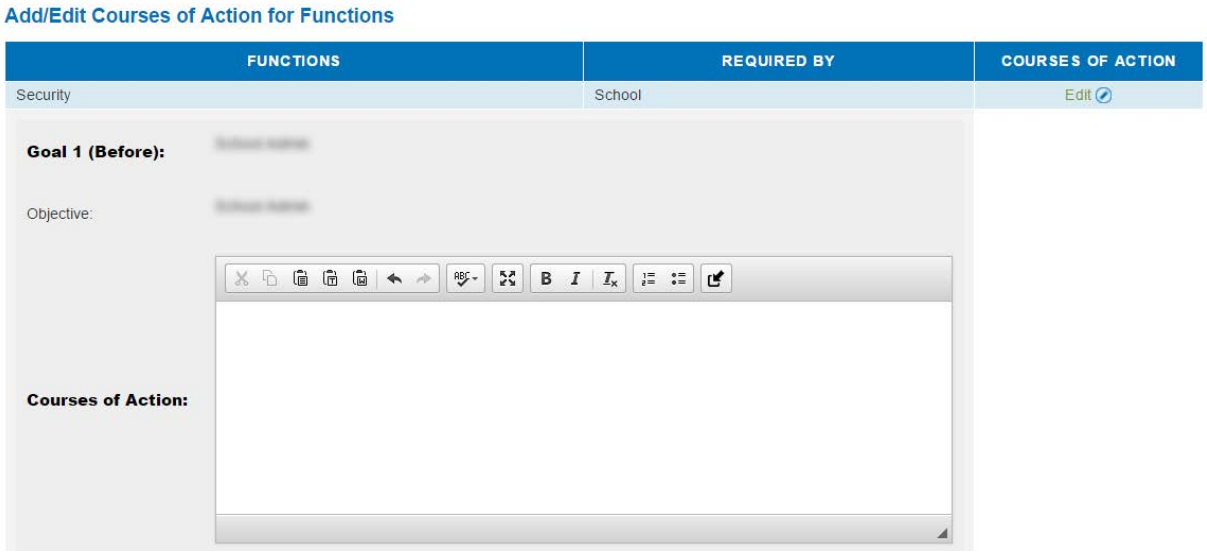
Step 4: Plan Development

This is where you identify courses of action for the threats and hazards that have goals and objectives, which continues to develop your threat- and hazard-specific annexes in your school EOP. Data saved in Step 3 pre-populate tables in Step 4. All threats and hazards with goals and objectives created in Step 3 will appear on the page "Develop Courses of Action for Threats and Hazards." Once data for all three courses of action sections (before, during, and after) have been added to a threat or hazard, all data associated with that threat or hazard will appear in Step 5.



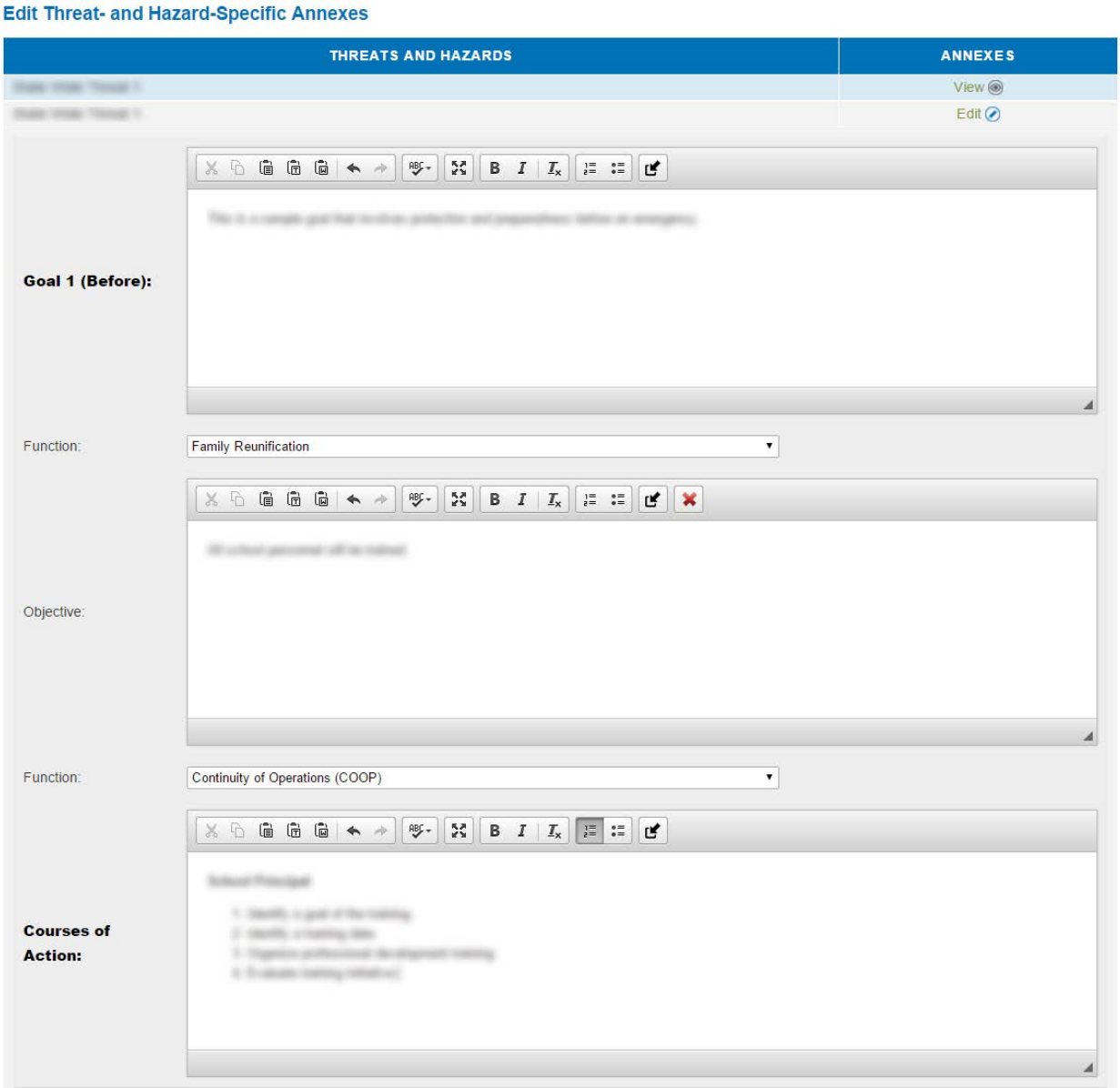
***Please note**: If your planning team has developed courses of action for a threat or hazard, but then de-selects that threat or hazard in the first form in Step 3, the threat or hazard will still appear in the Add/Edit Courses of Action for Threats and Hazards table. However, it will not be editable (as denoted by the View icon) or exported into the school EOP.*

This is also where you identify courses of action for the functions that have goals and objectives, which continues to develop your functional annexes in your school EOP. All functions with goals and objectives created in Step 3 will appear on the page "Develop Courses of Action for Functions." Once data for all three courses of action sections (before, during, and after) have been added to a function, all data associated with that function will appear in Step 5.



Step 5: Plan Preparation, Review, and Approval

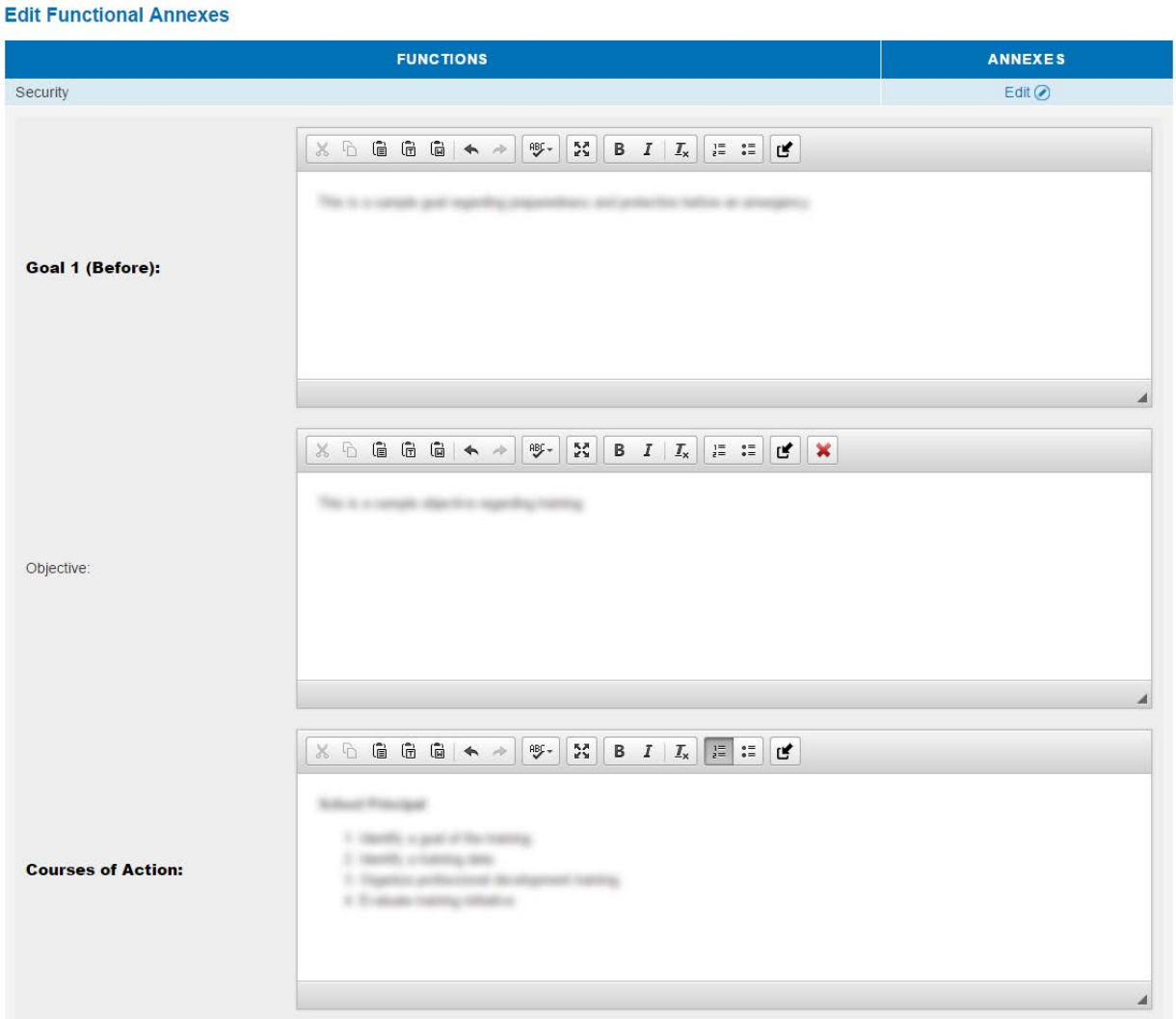
This is where you review and edit your threat- and hazard-specific annexes. Data saved in Step 4 pre-populates tables in Step 5. All threats and hazards with courses of action created in Step 4 will appear on the page "Prepare the Draft EOP: Threat- and Hazard-Specific Annexes." All data that appear on this page will be exported to the school EOP.



***Please note**: If your planning team has developed goals, objectives, and courses of action for a threat or hazard, but then de-selects that threat or hazard in the first form in Step 3, the threat or hazard will still*

appear in the Edit Threat- and Hazard-Specific Annexes table. However, it will not be editable (as denoted by the View icon) or exported into the school EOP.

This is where you review and edit your functional annexes. Data saved in Step 4 pre-populate tables in Step 5. All functions with courses of action created in Step 4 will appear on the page "Prepare the Draft EOP: Functional Annexes." All data that appear on this page will be exported to the school EOP.



This is also where you develop, review, and edit your Basic Plan section. These data are separate from the rest of the forms in the application. It also has unique functionality, as you can upload an external document to populate this entire section. All data that appear on this page will be exported to the school EOP.

Prepare the Draft EOP: Basic Plan

Your planning team will begin developing a draft of the school EOP with the Basic Plan section. The Basic Plan section provides an overview of the school's approach to emergency operations and often consists of several subsections, as listed below. You may manually create the Basic Plan section by selecting Create Basic Plan below. Then click the Add button for each of the subsections below and follow the directions for that subsection. If you are modifying previously saved subsections, please click the Edit button for the corresponding subsection.

If your school or district already has an up-to-date Basic Plan section (provided as a Microsoft Word document), you may upload the Basic Plan into EOP ASSIST. To upload your Basic Plan section, select Use Uploaded Basic Plan below. Then click the Choose File button that appears and select the appropriate file. After the page is refreshed, your uploaded Basic Plan will be found in the first row of the table below. Only one uploaded Basic Plan section will be saved in EOP ASSIST at a time.

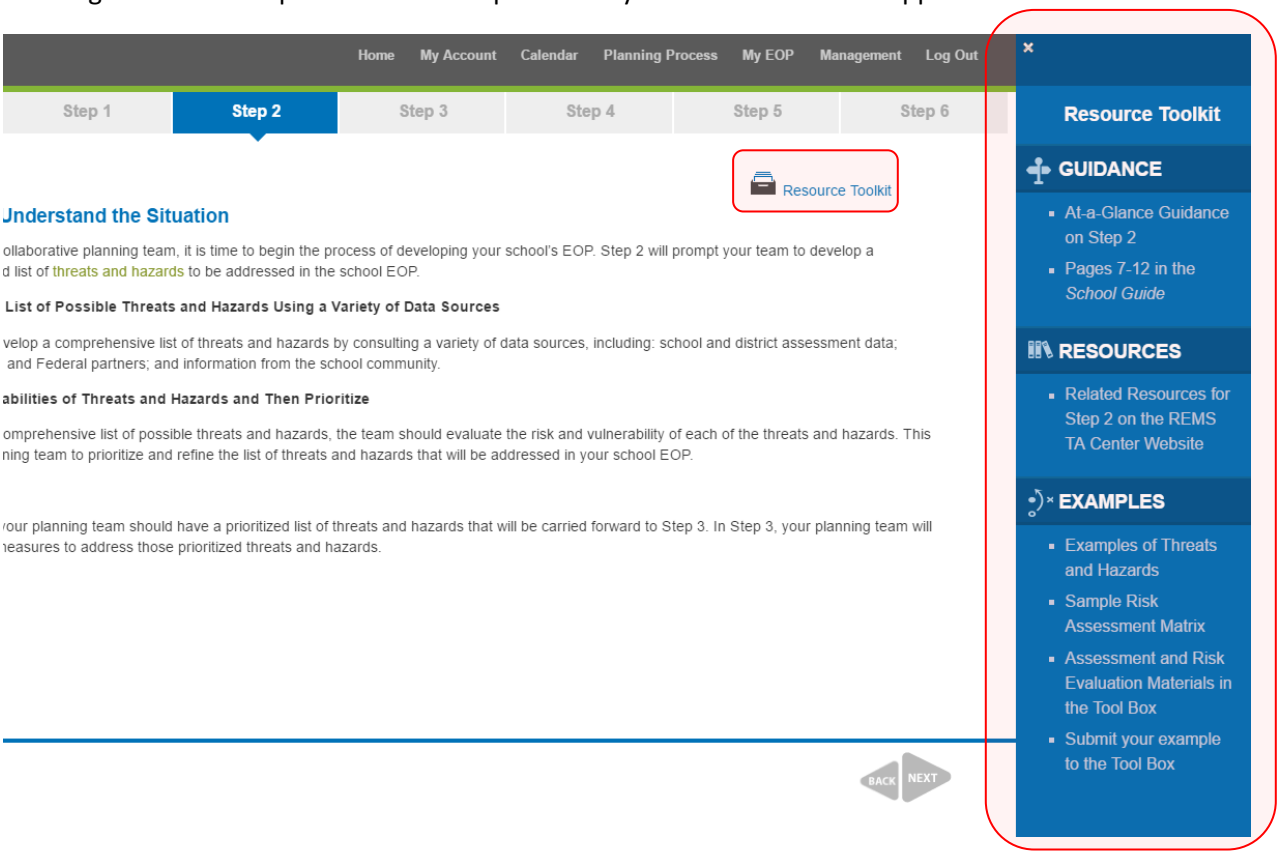
☑ Create Basic Plan ☐ Use Uploaded Basic Plan

BASIC PLAN	
1. Introductory Material	Add ⊕
2. Purpose, Scope, Situation Overview, and Assumptions	Add ⊕
3. Concept of Operations (CONOPS)	Add ⊕
4. Organization and Assignment of Responsibilities	Add ⊕
5. Direction, Control, and Coordination	Add ⊕
6. Information Collection, Analysis, and Dissemination	Add ⊕
7. Training and Exercises	Add ⊕
8. Administration, Finance, and Logistics	Add ⊕
9. Plan Development and Maintenance	Add ⊕
10. Authorities and References	Add ⊕

If you select "Use Uploaded Basic Plan," please remember that only one uploaded document is saved in the application at a time, and it must be in the format of a Microsoft Word document. If the Basic Plan is updated at any time, you must also manually change the date of the school EOP in either the Introductory Material section or in the downloaded school EOP each time the plan is updated. Otherwise, the school EOP will display the previously saved date.

Resource Toolkit

The Resource Toolkit includes useful materials to help you complete your school EOP and is only available in the Home/Getting Started and Planning Process sections. This should be used as an additional source of information to enrich your knowledge of the six-step planning process. Guidance contains links that lead users directly to the *School Guide* and to at-a-glance information on the *School Guide*. Resources include a wide variety of tools, documents, online courses, and training materials that were developed for and by Federal agencies and the REMS TA Center. Examples contain links that show the tangible result and product of the step in which you are located in the application.



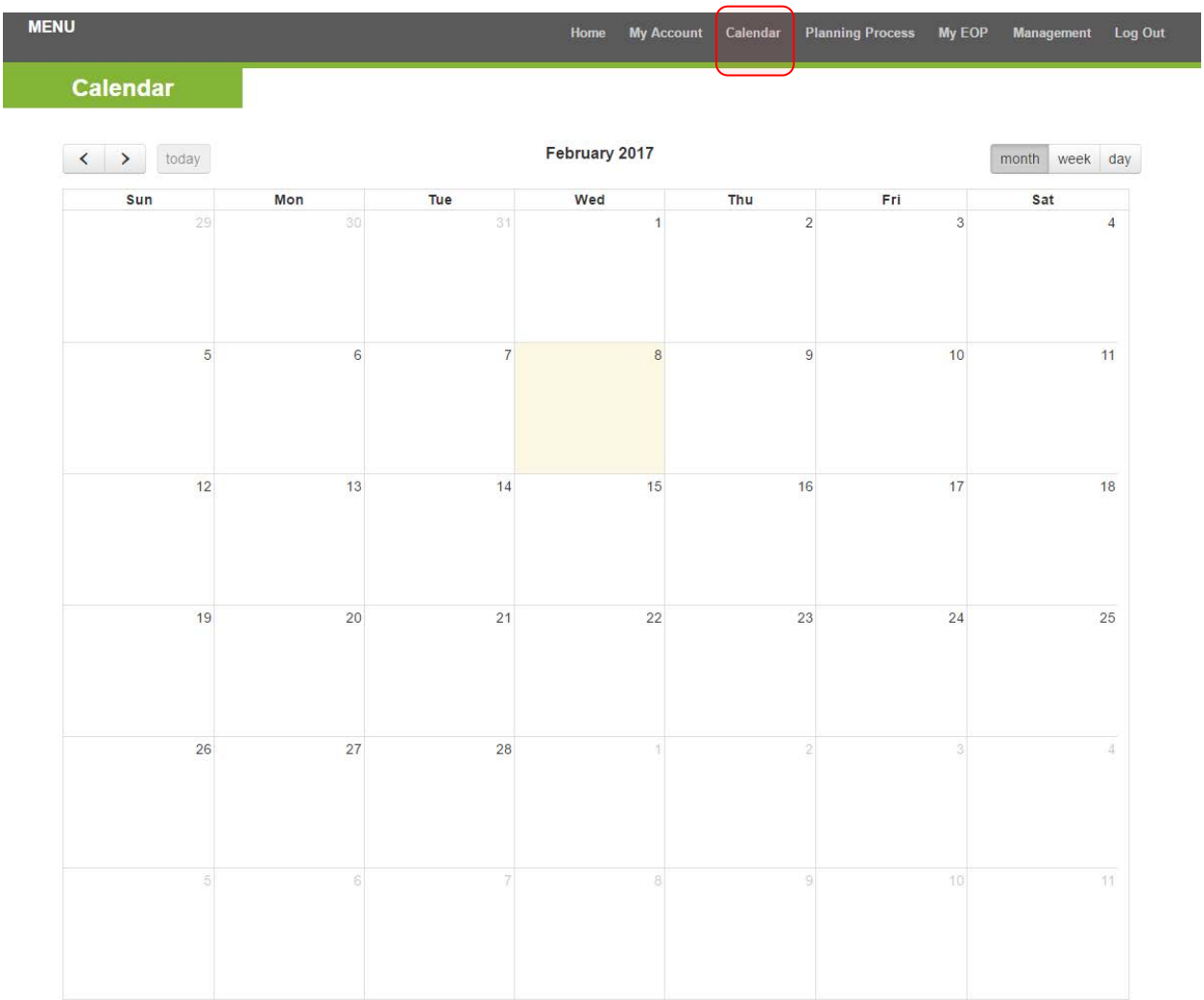
Please note: *For more information on how to open, use, and close the Resource Toolkit, please refer to Chapter 4.*

Calendar

School emergency management planning is an ongoing effort that is reinforced through regularly scheduled planning meetings. Often, planning teams creating new school EOPs will have to meet frequently at first. Once the school EOP is in place, teams will need less frequent, but regular meetings to revise and maintain the plan. The Calendar section will help you schedule meetings and create reminders and notifications to support the team's planning process.

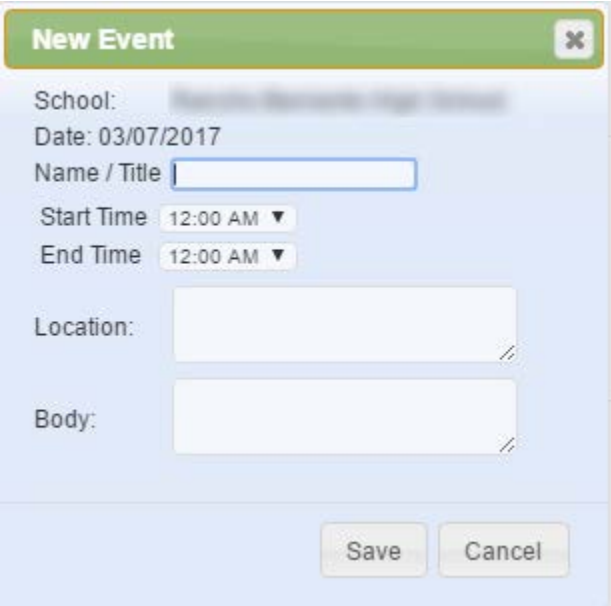
School Users and School Administrators will only see the events planned for their individual school. These events will also be seen by the District Administrators, who will see all events planned for each school in their district. State Administrators, however, will only see events planned at the state level, which will not be shared with users at the school and district levels.

To use this feature, click on Calendar in the Navigation Bar. There also are links to the Calendar feature in Step 1 and Step 6 of the application, which will open the Calendar in a new browser.



Create a New Event

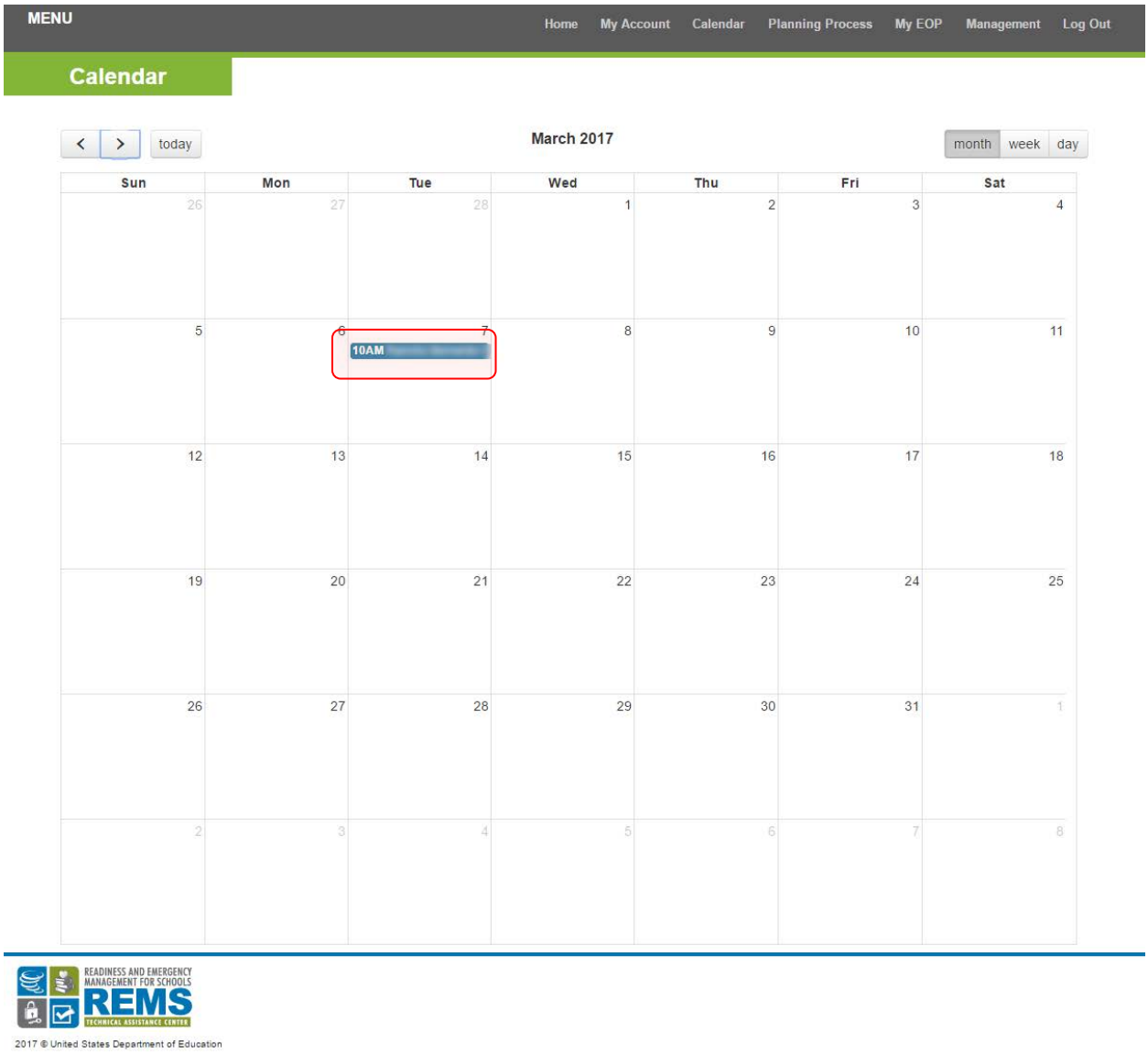
1. Click on the day that the event will take place.
2. Confirm the date and adjust the start time and end time.
3. Add the event title, location, and description in the fields.



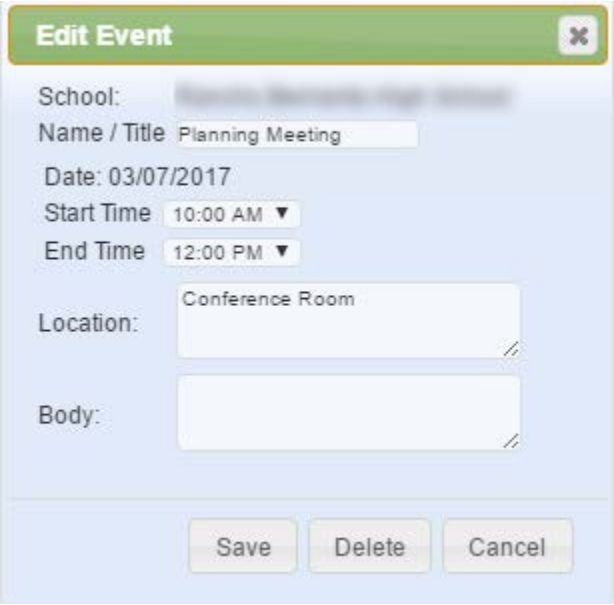
4. Click the **Save** button.
5. Your screen will return to the Calendar section and the event will appear on the Calendar.

Edit an Existing Event

6. Select the event in the calendar.

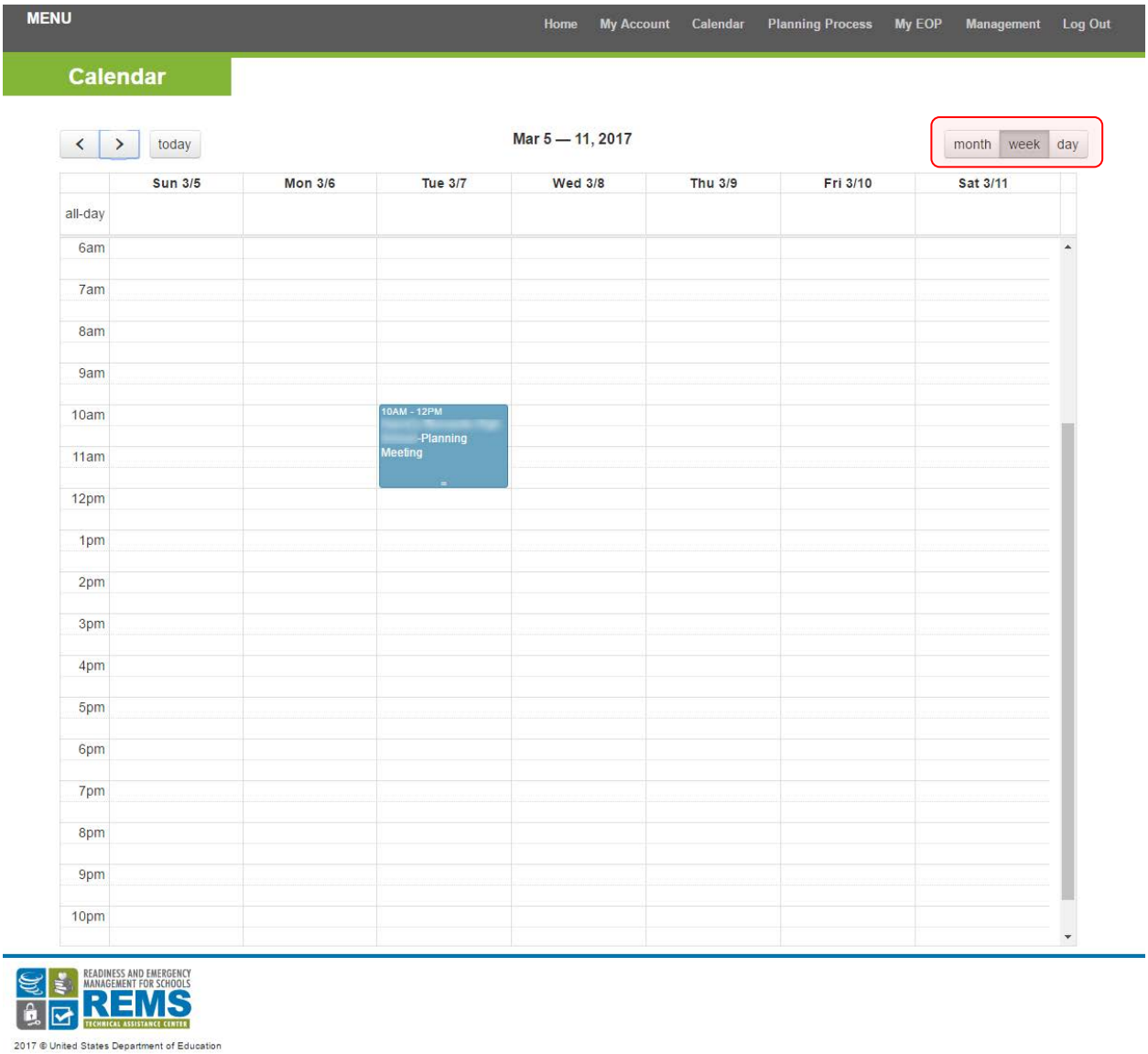


7. Edit the event, as needed,
8. Click the **Save** button.



Viewing Events

You can view your calendar by month, week, or day. To switch the display of the calendar, click on one of the buttons in the upper right-hand corner of the page. The screen below shows the calendar in weekly view.



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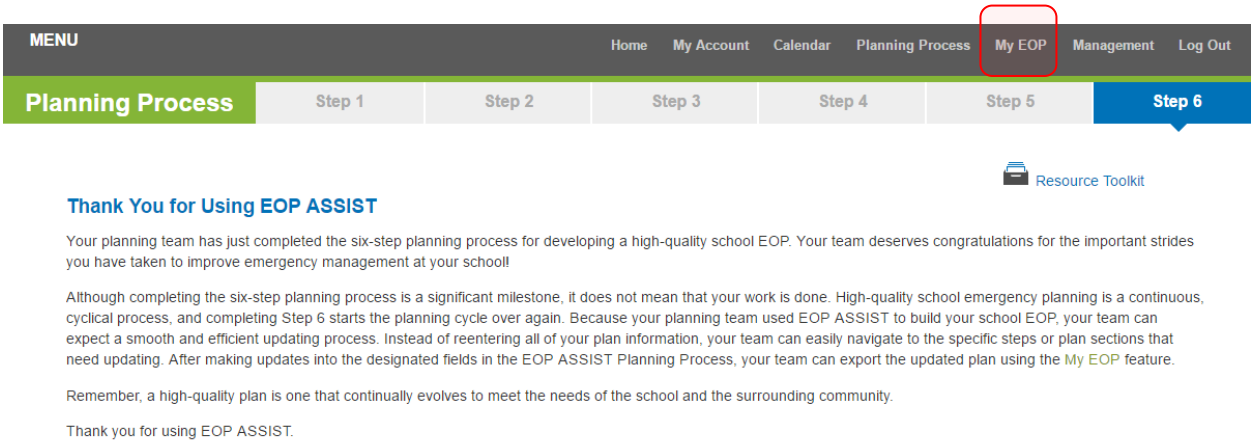
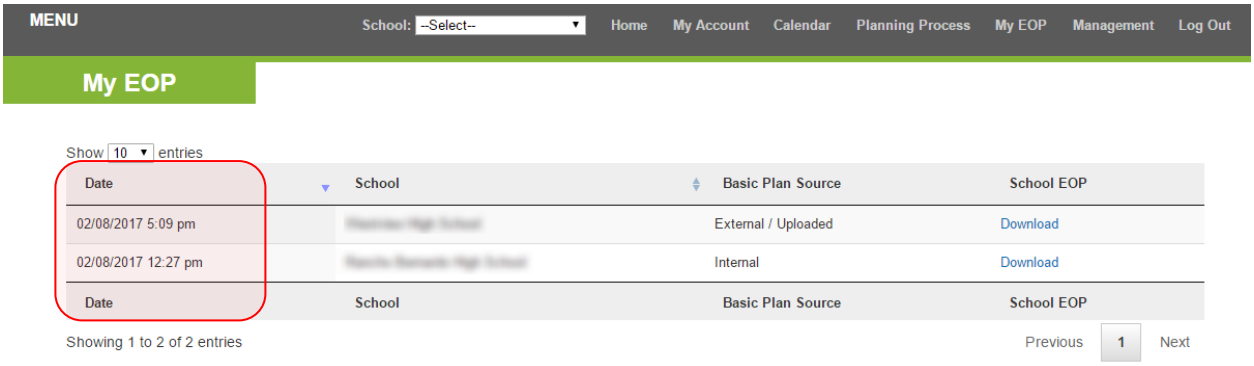
My EOP

The result of the six-step planning process is the school EOP, which may be accessed, for the most part, in the My EOP section. This is where users may download the plan as a Microsoft Word document, which allows your team to create a table of contents, as well as review and revise the plan. Exporting the plan into a Word document also lets planning teams control versions of your school EOP by saving them on a designated secure system. Only the most up-to-date version of your school EOP will available in EOP ASSIST, which means that once data are updated, your school EOP will also be updated and your collaborative planning team will not be able to access the previous version within the application. This is why it is important to save previous versions on a designated secure system.

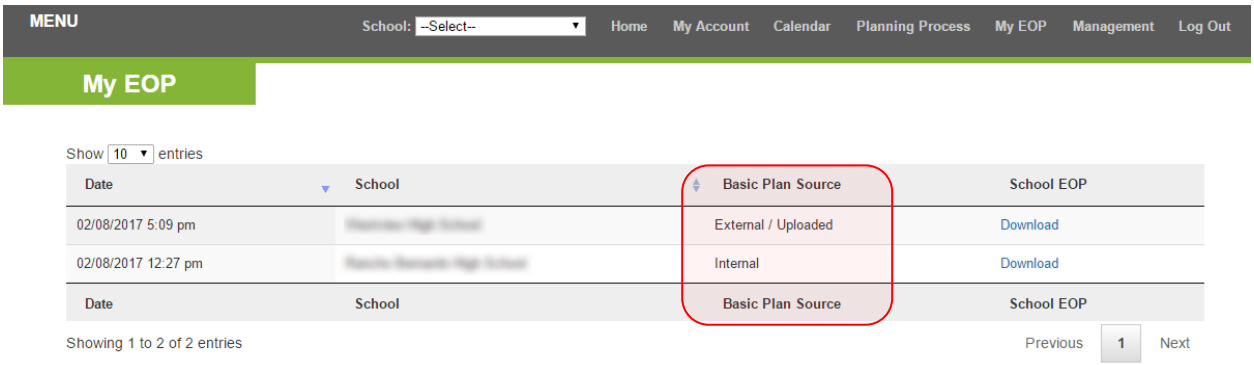
1. Select **My EOP** in the Navigation Bar.



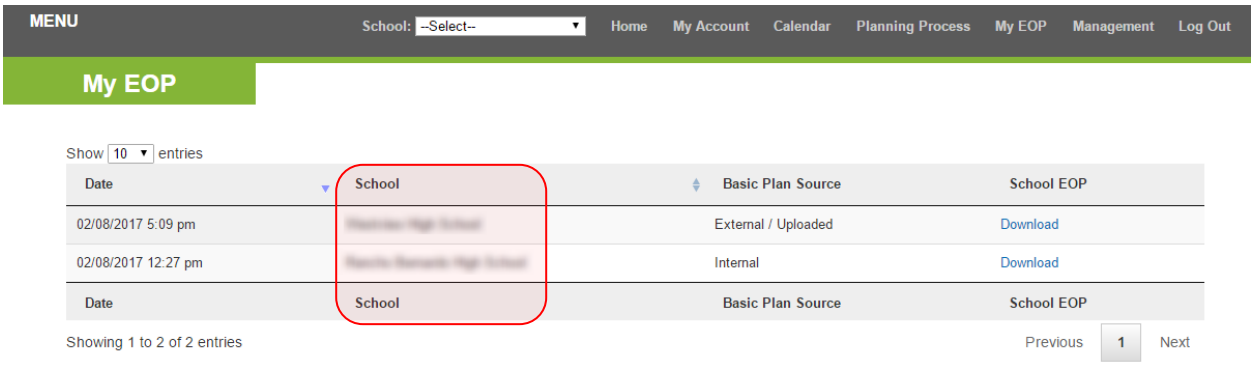
You will be presented with a list of school EOPs to which you have access. All School Users, School Administrators, and State Administrators will only see one school EOP on this page, although the State Administrators will only see their sample school EOP. District Administrators, however, will be able to see all school EOPs for the schools in their district on this page. The **Date** column indicates the last time the school EOP was updated and is marked with a timestamp.



The **Basic Plan Source** column indicates how the Basic Plan section of the school EOP was imported into the school EOP. “Internal” means that users typed and inserted dates for each subsection of the Basic Plan directly into the application. “External/Uploaded” means that users uploaded a Microsoft Word document to replace the entire Basic Plan section.

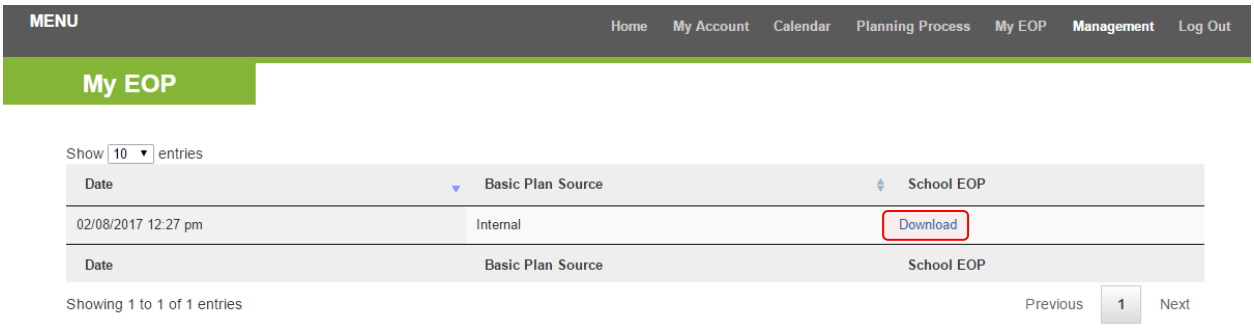


The **School** column is only present for District Administrators and indicates the school from which the school EOP is.



The **School EOP** column allows users to download the school EOP as a Word document to their computer.

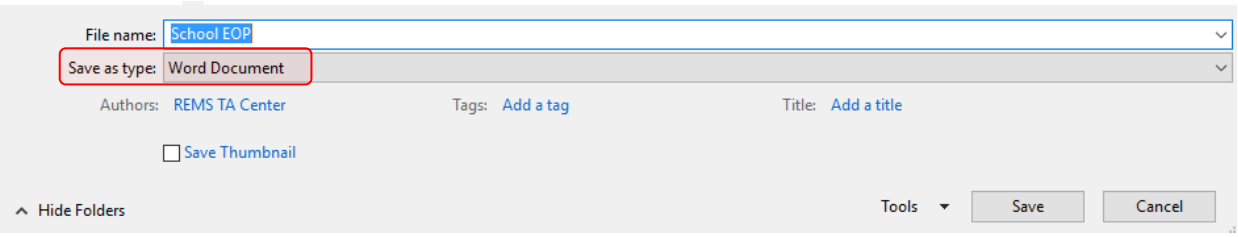
2. Click the **Download** button.



3. Save the file to your institution's designated secure system.

Finally, your team may prefer to share the plan in a PDF format. If so, you may save the exported Word version of the plan as a PDF.

4. Click **Save As** in the Microsoft Word document.
5. Select **PDF** in the Save As Type dropdown menu.



***Please note**: For more information on how State Administrators and District Administrators can potentially access school EOPs in the Management section, please refer to [Chapter 6](#).*

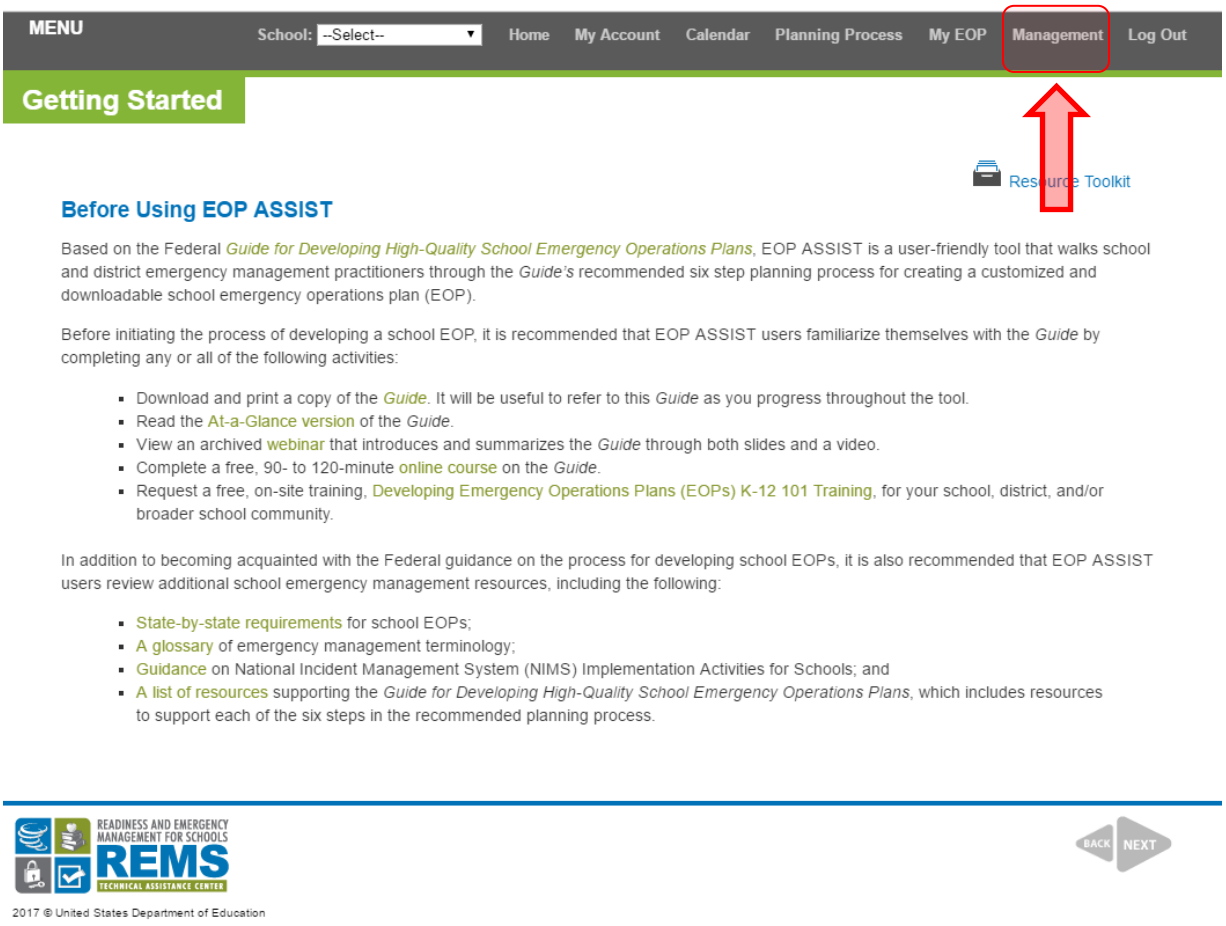
Chapter 6: Management Features for Administrators

In addition to all of the features discussed in Chapter 5, users with administrative privileges—including the Super Administrator, State Administrators, District Administrators, and School Administrators—will have added capabilities. Each of these Administrators can manage the user accounts on a school planning team, although in different capacities. This chapter describes the uses and functions of these added capabilities for the Super Administrator, State Administrators, District Administrators, and School Administrators. Please refer to the subsection that aligns with your own user role.

Super Administrator

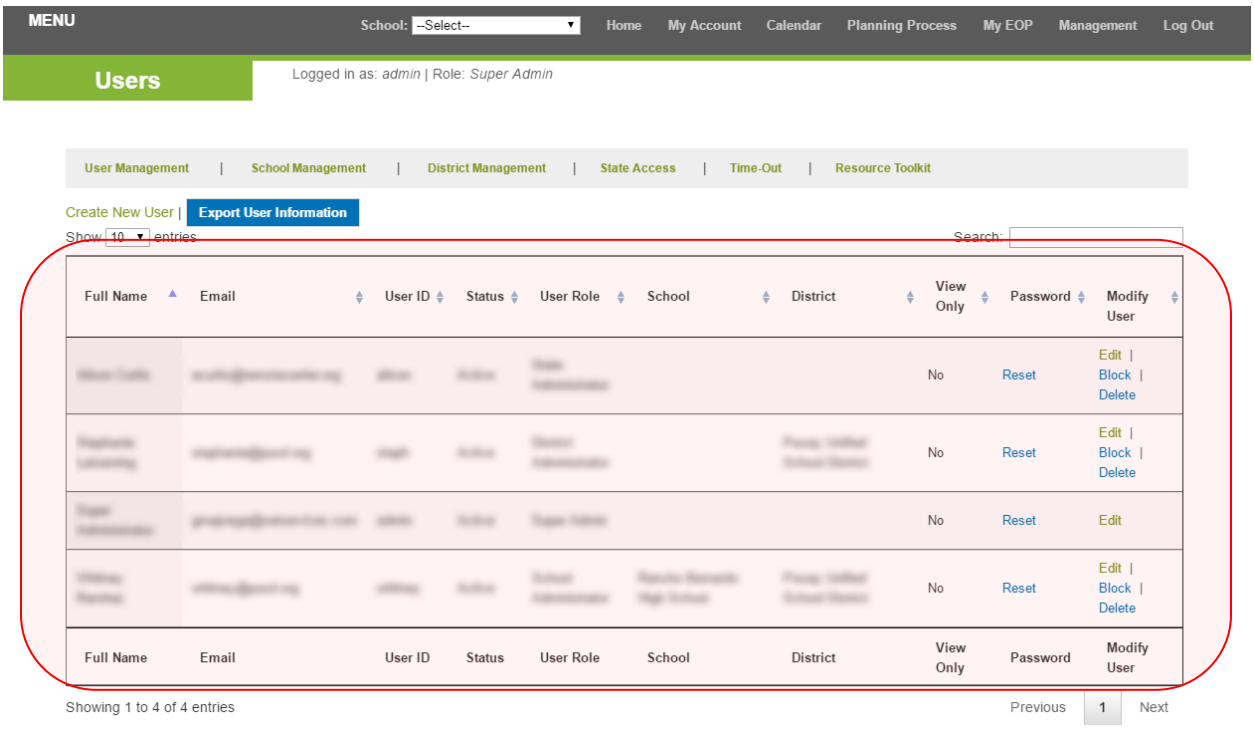
The Super Administrator serves as the database manager for EOP ASSIST and is responsible for setting up the institution's account within the application, as well as creating the appropriate administrator accounts, based on the institution's hosting level. The Super Administrator is able to create school profiles, district profiles, and user accounts with any user role. More information on the Super Administrator's initial responsibilities is available in the *EOP ASSIST 3.0 Installation Manual*.

1. Select **Management** in the Navigation Bar.



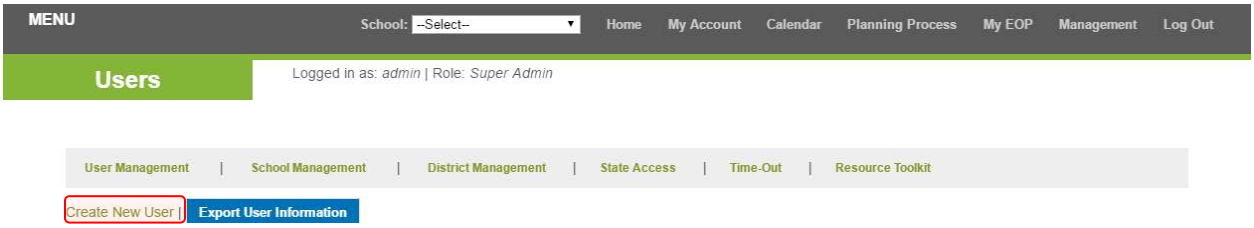
Managing User Accounts

As the Super Administrator, you will first see a list of user accounts within your institution's jurisdiction, which is called the User List. This lets you view all of the user accounts that have access to the application. User accounts can be sorted alphabetically by various categories so that you can more easily find a specific user account. You are also able to search through the list to find specific user accounts, as well as create new user accounts and edit, delete, or block existing user accounts. Further, this page lets you reset passwords, if needed.

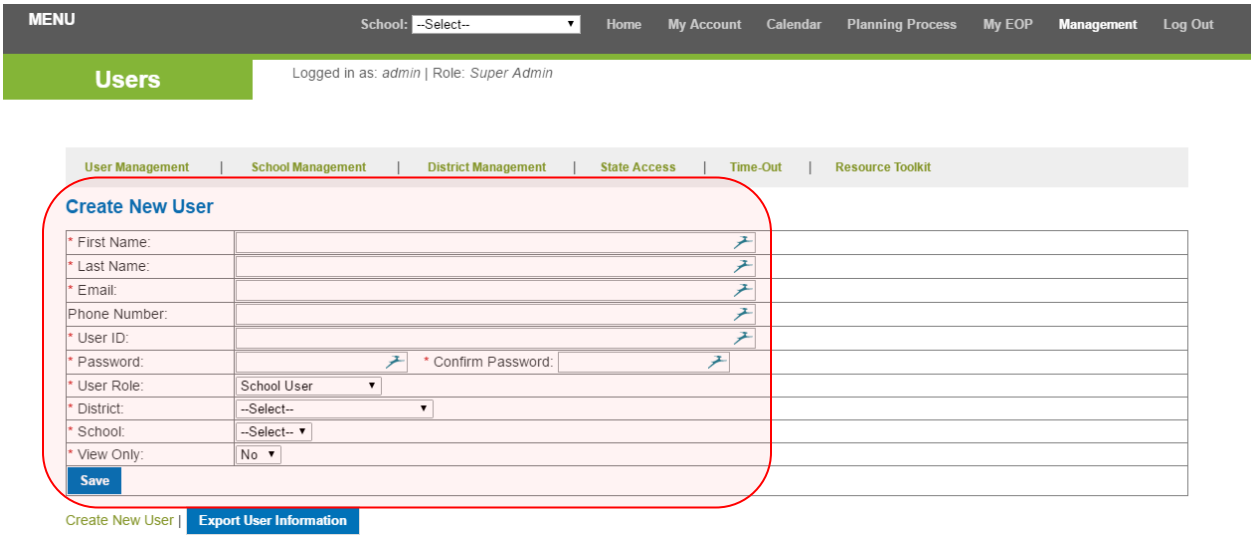


Creating New User Accounts

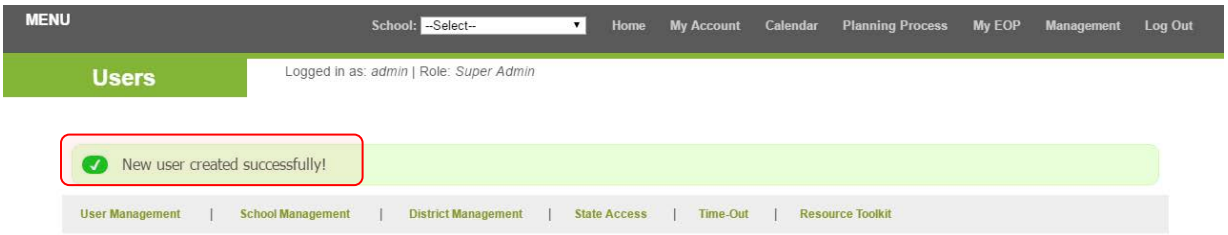
1. Click the **Create New User** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears. User IDs and email addresses must be unique for each user.
    - Select the appropriate user role in the User Role dropdown menu: State Administrator, District Administrator, School Administrator, or School User. For more information on each user role, please refer to Chapter 4.
    - Select the appropriate information for the District and/or School dropdown menus, if they appear for the selected User Role.
    - Select the appropriate choice for the View Only dropdown menu, only if School User is selected for the User Role. The View Only feature allows School User accounts to view, but not add or edit, data within the application for their school.
3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



1. The user account name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



2. Share the newly created User ID and password with the user so that he or she can log in and change his or her account information. When a profile is created, the user is automatically given

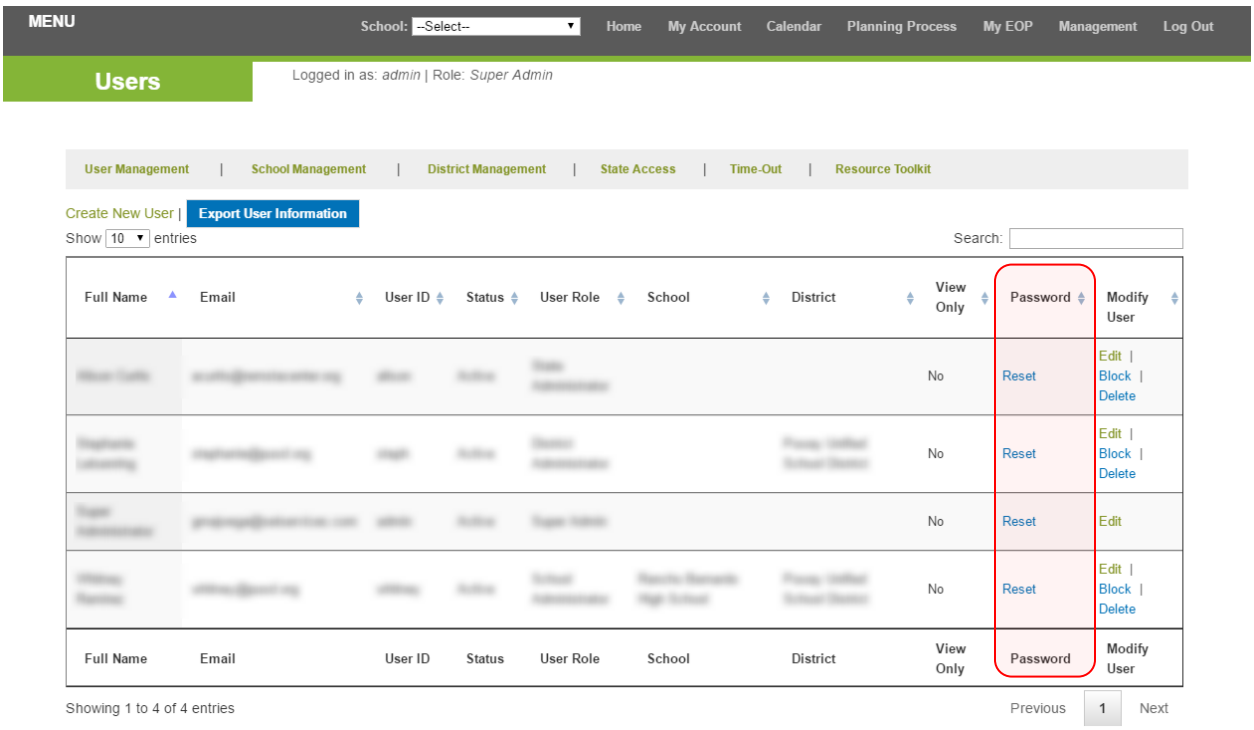
an "active" status. This means that new user accounts have access to EOP ASSIST through their respective log-in information.

***Please note**: Although the Super Administrator can create a new user account for any user role, he or she should only be responsible for creating the first new user at the highest level of the entity hosting the application. In the case of state-level hosting, the Super Administrator should only create the first State Administrator. In the case of district-level hosting, the Super Administrator should only create the first District Administrator. In the case of school-level hosting, the Super Administrator should only create the first School Administrator. The responsibility of creating subsequent user accounts should be left to the other administrators at the state, district, or school levels. For more information on the Super Administrator's initial responsibilities, please refer to the* EOP ASSIST 3.0 Installation Manual.

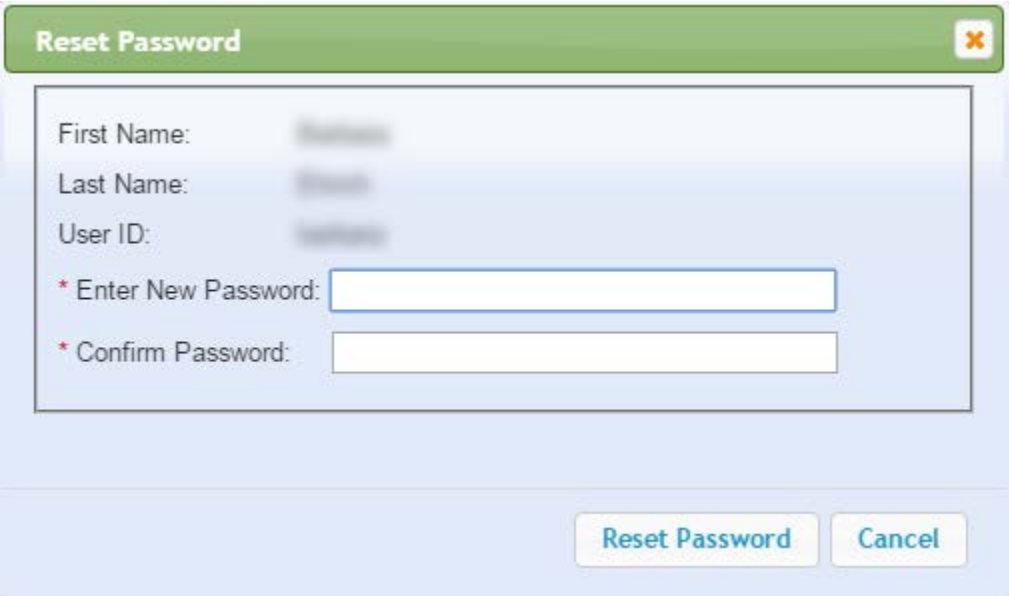
Resetting Passwords

As the Super Administrator, you also have permission to reset passwords, in case people forget their passwords. While you have the ability to reset passwords for any user account with any user role, you should only be responsible for resetting the passwords of user accounts with the highest user role (for example, State Administrators during state-level hosting, District Administrators during district-level hosting, and School Administrators during school-level hosting). All other users should contact their respective Administrators to request their passwords to be reset.

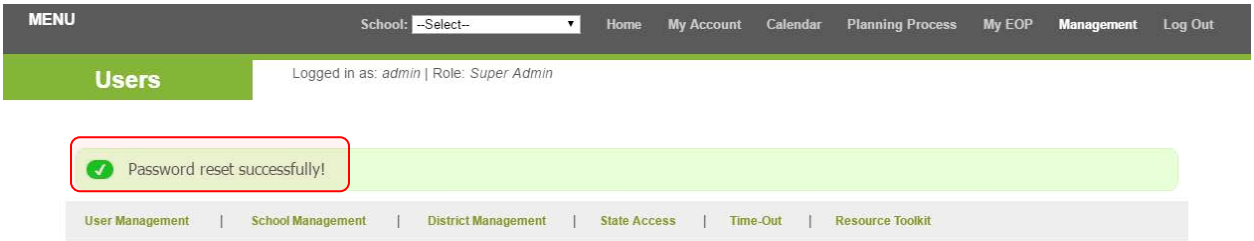
1. Click the **Reset** button in the Password column for the corresponding user.



2. Confirm that the First Name, Last Name, and User ID that appear are correct for the user account whose password you wish to reset.
3. Fill all of the required fields (noted with an asterisk) with a new password in the pop-up that appears.
4. Make a note of the new password so that you can send it to the actual user who will use this password to log in.
5. Click the **Reset Password** button.



6. The new password will save, the screen will return to the User List, and a confirmation message that a password was reset successfully will appear.

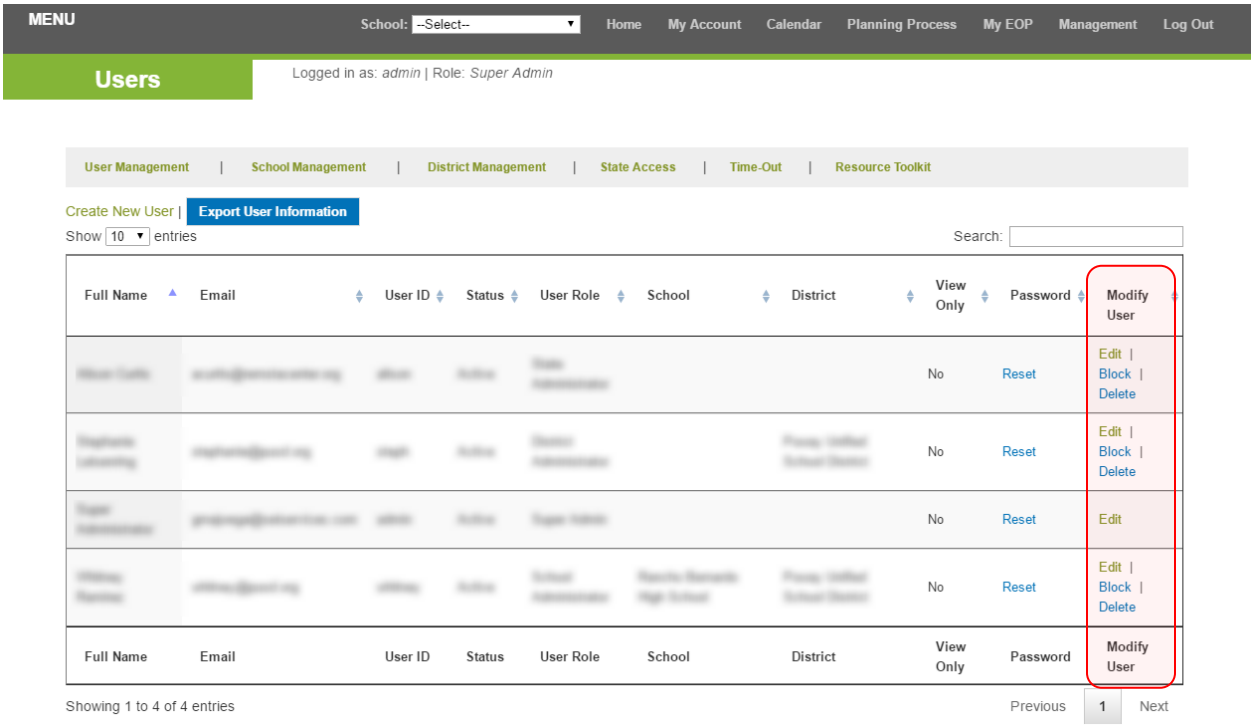


7. Share the new password with the user so that he or she can log in and change his or her password for confidentiality purposes.

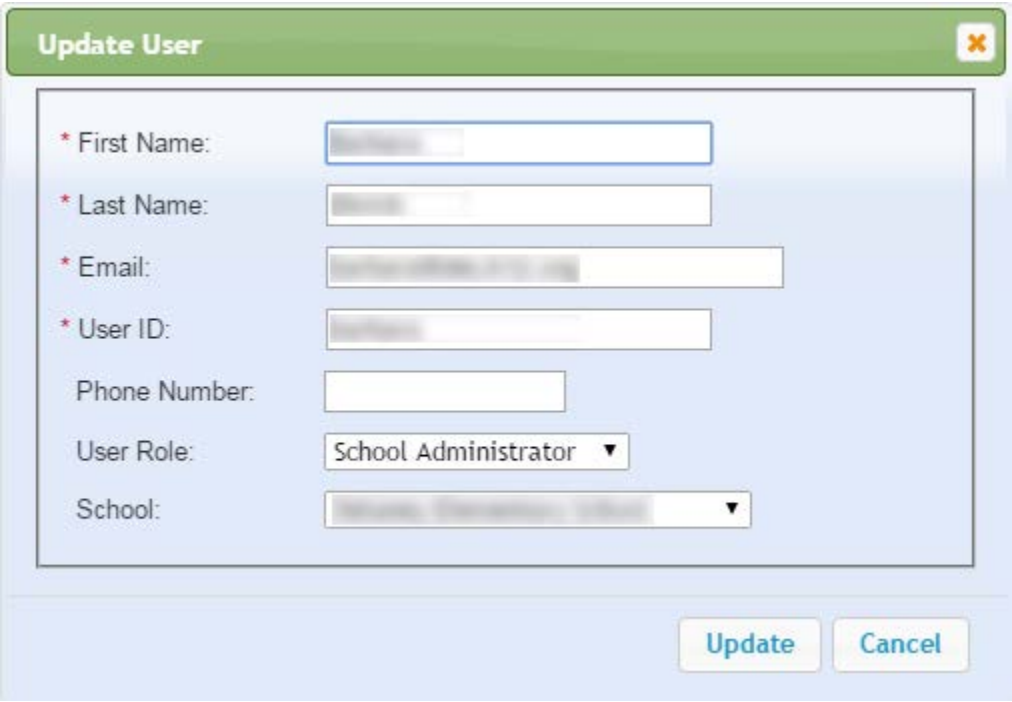
Modifying User Accounts

The Super Administrator also has permission to modify information for user accounts. This may include editing the name, email address, phone number, view only status, user role, or affiliation of the user account.

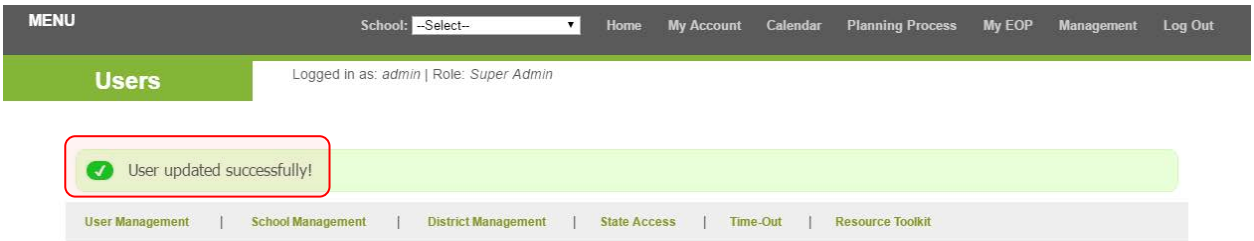
1. Click the **Edit** button in the Modify User column for the user account that you wish to modify.



2. Edit any of the fields that you wish to modify in the pop-up that appears.
3. Click the **Update** button.



4. The user account information will save, the screen will return to the User List, and a confirmation message that a user account was updated successfully will appear.

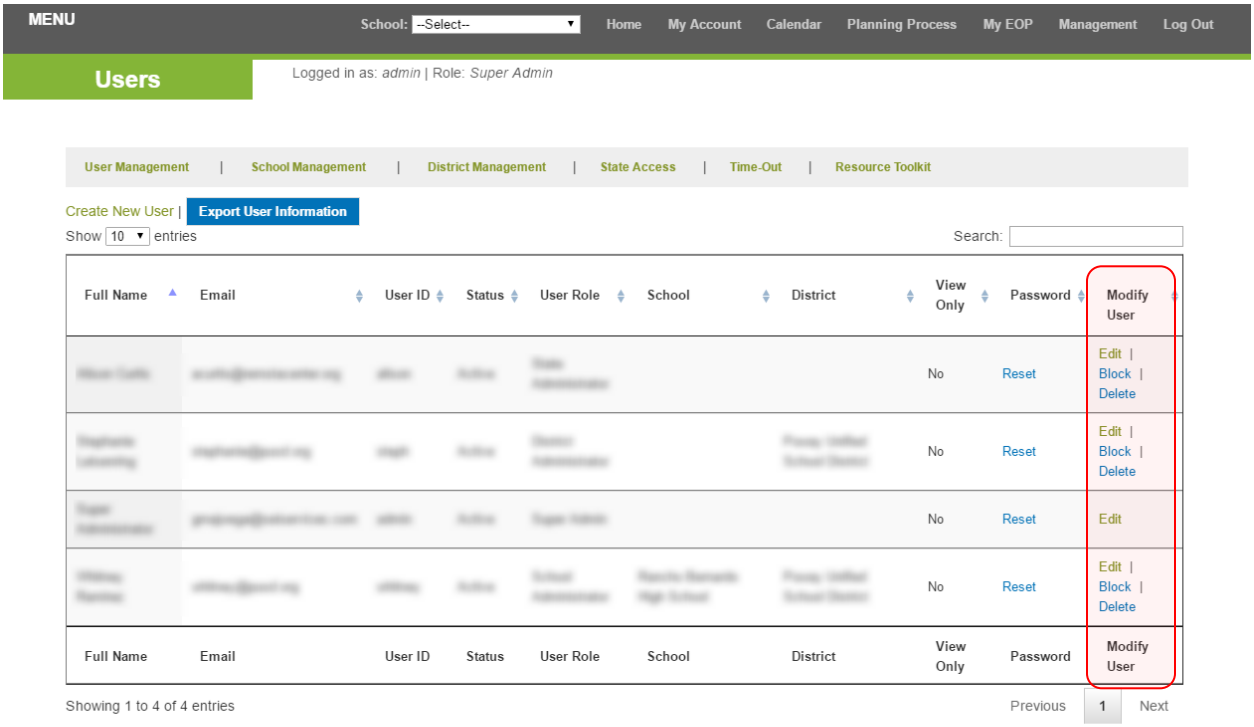


***Please note**: You cannot change your own User Role and no other users can change the User Role of the Super Administrator.*

Deleting User Accounts

The Super Administrator also has permission to delete user accounts. This is the only user role that may complete this task and, once it is complete, the user account cannot be recovered. The Super Administrator may want to delete a user account if a user account was created in error, or if a user leaves a school, district, or other institution.

1. Click the **Delete** button in the Modify User column for the user account that you wish to delete.



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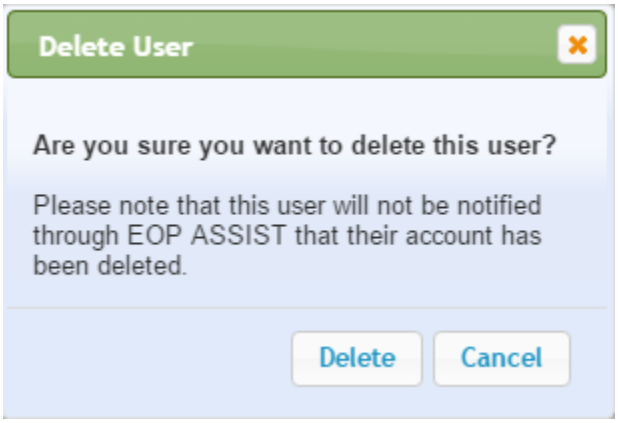
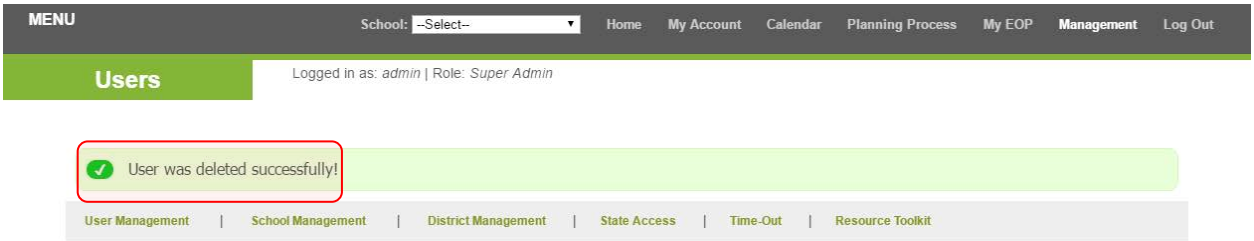
2. Click the **Delete** button.



3. The user account information will be deleted, the screen will return to the User List, and a confirmation message that a user account was deleted successfully will appear.

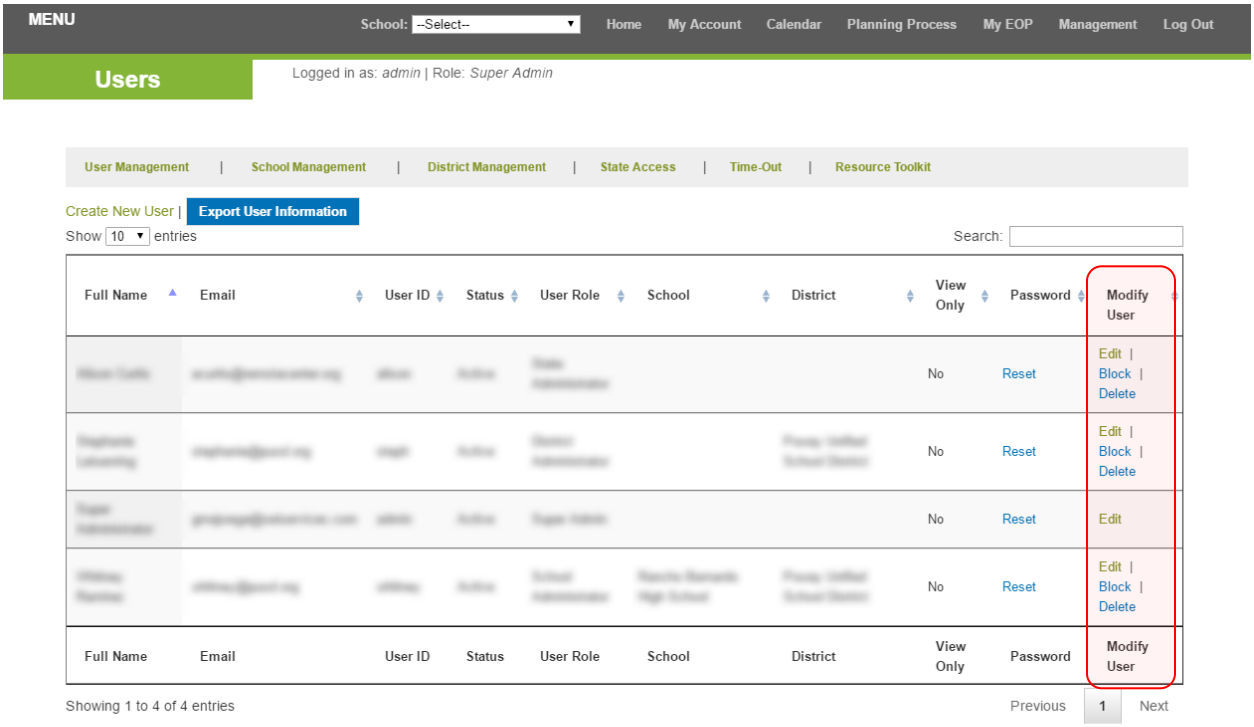


***Please note**: The Super Administrator is the only user role with the ability to delete a user account. Further, you cannot delete your own user account, and no other users can delete the Super Administrator account.*

Blocking User Accounts

The Super Administrator also has permission to block user accounts. This feature prohibits the user from successfully logging in to the application until their user account is "unblocked." The Super Administrator may want to block a user account if a user leaves a school, district, or other institution, but do not want to delete their user account permanently.

1. Click the **Block** button in the Modify User column for the user account that you wish to block.



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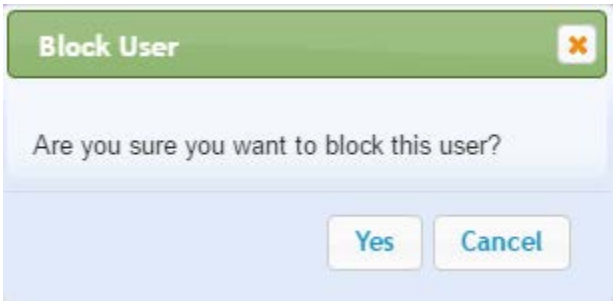
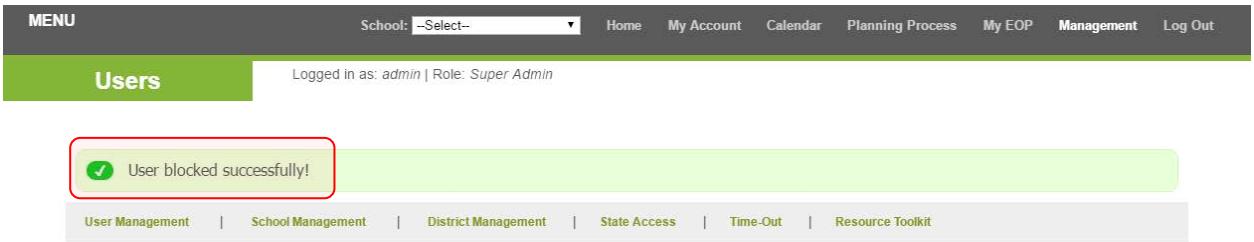
2. Click the **Yes** button.



3. The user account status will save, the screen will return to the User List, and a confirmation message that a user account was blocked successfully will appear.

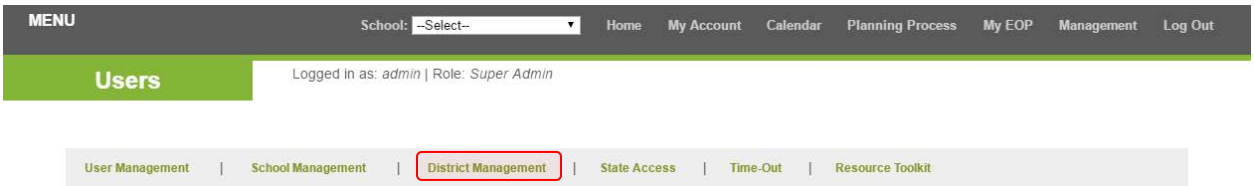


***Please note**: You cannot block your own user account, and no other users can block the Super Administrator account.*

Managing District Profiles

In state-level hosting and district-level hosting, the Super Administrator account can manage the district(s) using EOP ASSIST. This includes creating district profiles(s), as well as editing existing district profile(s).

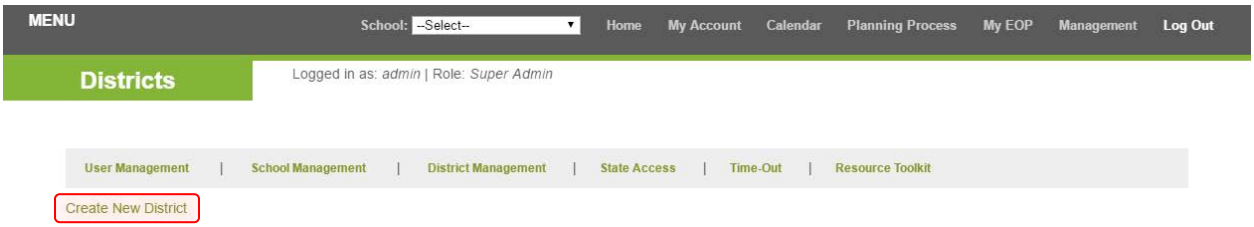
1. Select the **District Management** tab.



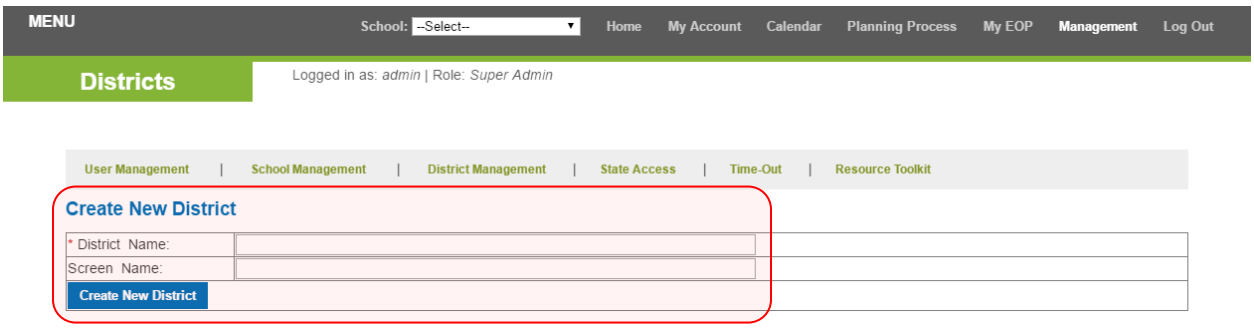
You will be presented with a list of all district profiles that have already been created (if any). This list lets you view all of the district profiles that have access to the application. District profiles can be sorted alphabetically so that you can more easily find a specific district. You are also able to search through the list to find specific district profiles, as well as create new district profiles and edit or delete existing district profiles.

Creating New District Profiles

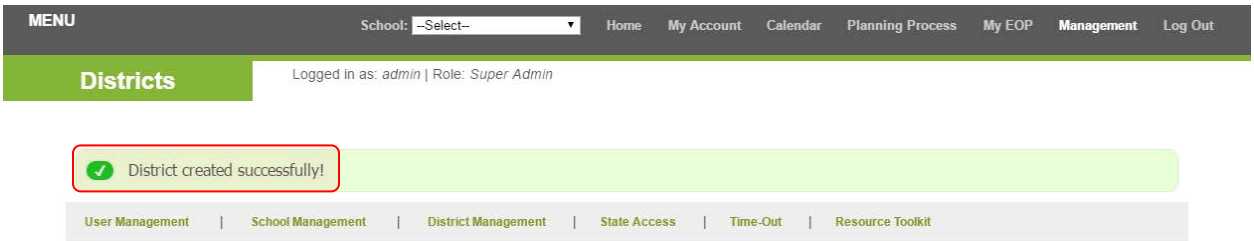
1. Click the **Create New District** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears.
   - Type the full name of the district in the District Name field.
   - Type the acronym or abbreviation of the district in the Screen Name field.
3. Click the **Create New District** button.



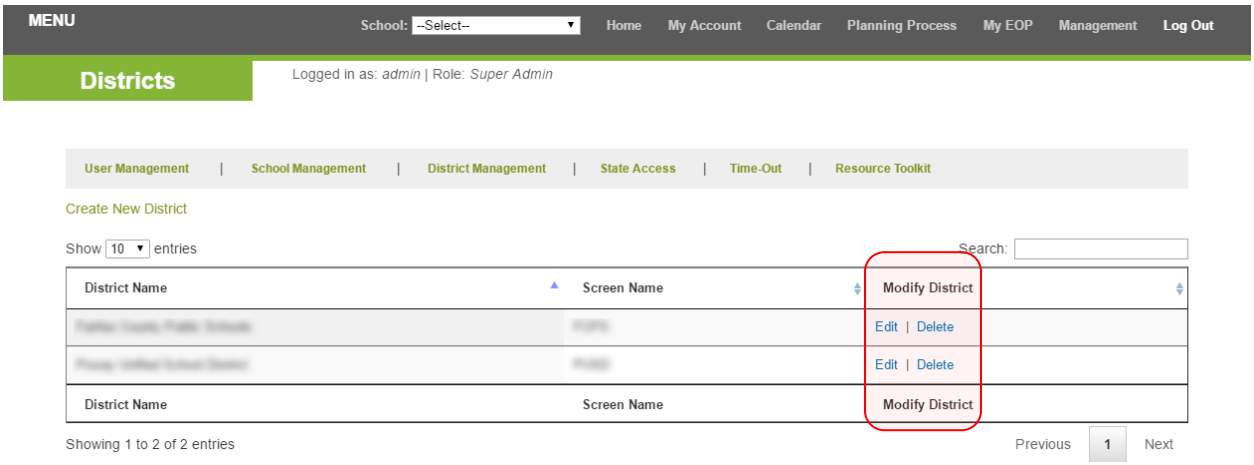
4. The district profile information will save, the screen will return to the District List, and a confirmation message that a new district profile was created successfully will appear.



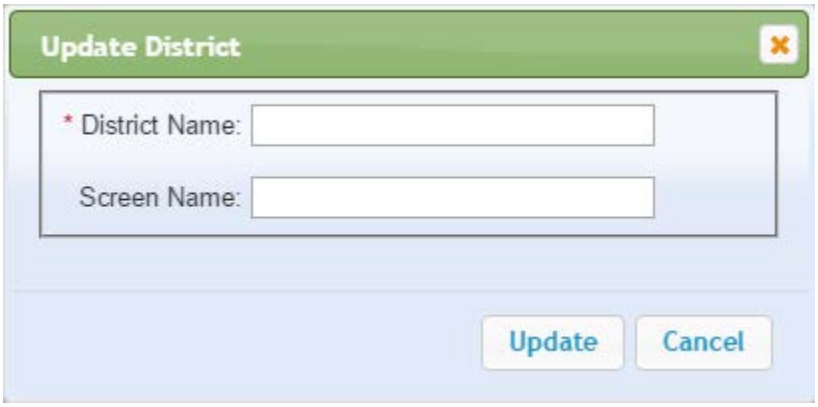
***Please note**: Although the Super Administrator has the ability to create district profiles, he or she should only be responsible for creating a district profile in the case of district-level hosting. State Administrators should assume the responsibility of creating district profiles in the case of state-level hosting.*

Modifying District Profiles

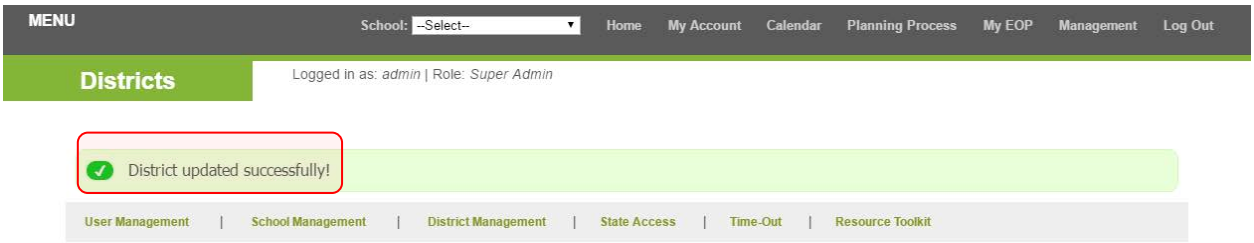
1. Click the **Edit** button in the Modify District column for the corresponding district profile that you wish to modify.



2. Edit any of the fields that you wish to modify in the pop-up that appears.
3. Click the **Update** button.



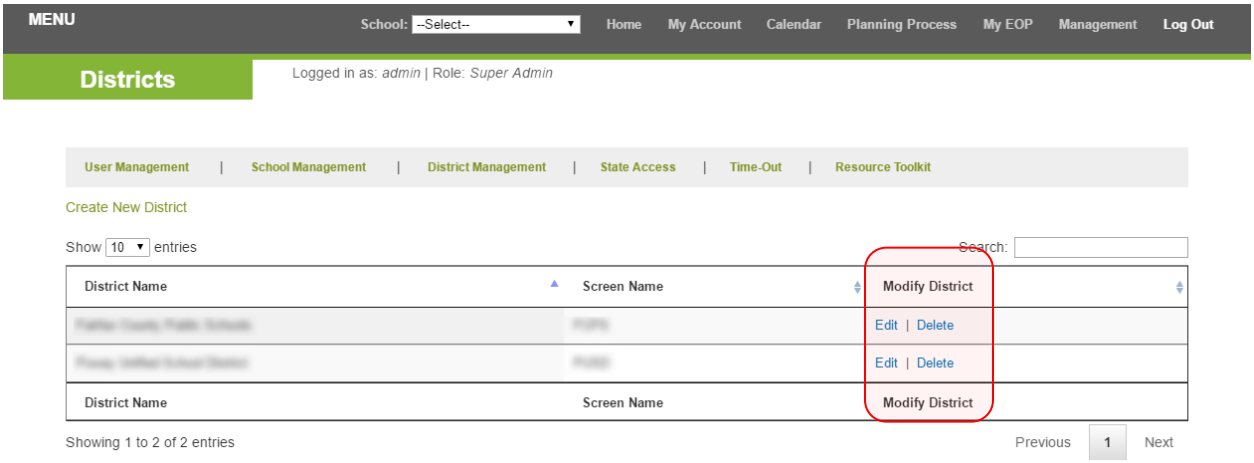
4. The district profile information will save, the screen will return to the District List, and a confirmation message that a new district profile was updated successfully will appear.



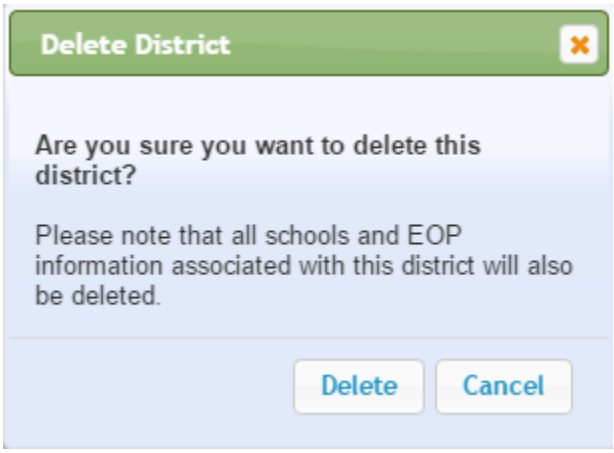
Deleting District Profiles

The Super Administrator also has permission to delete district profiles. This is the only user role that may complete this task and, once it is complete, the district profile cannot be recovered. Additionally, all school profiles and school EOPs associated with this district will be deleted. The Super Administrator may want to delete a district profile if district profile was created in error, or if a district closes permanently.

1. Click the **Delete** button in the Modify District column for the corresponding district profile that you wish to delete.

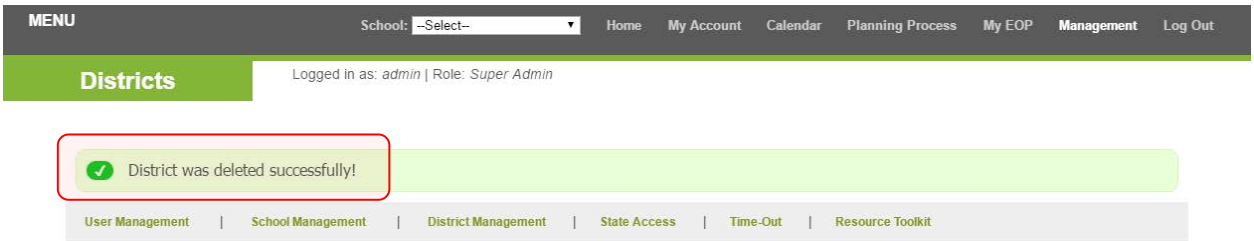


2. Click the **Delete** button.



***Please note**: The Super Administrator is the only user role with the ability to delete a district profile. This is a permanent action that cannot be undone.*

3. The district profile will be deleted, the screen will return to the District List, and a confirmation message that a district profile was deleted successfully will appear.

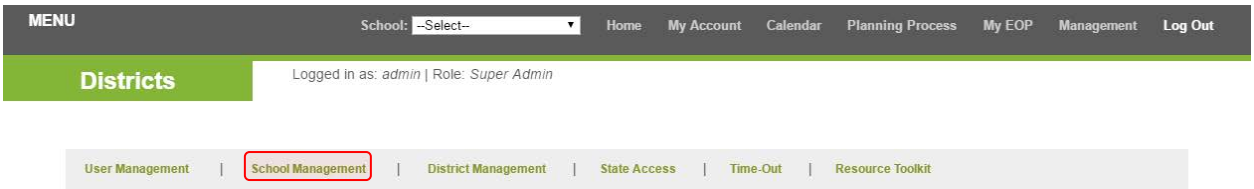


***Please note**: The Super Administrator is the only user role with the ability to delete a district profile.*

Managing School Profiles

In all hosting levels, the Super Administrator account can manage the school(s) using EOP ASSIST. This includes creating school profiles(s), as well as editing existing school profile(s).

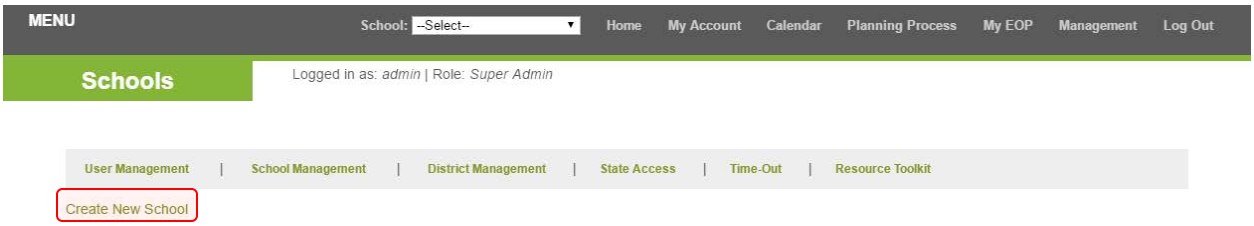
1. Select the **School Management** tab.



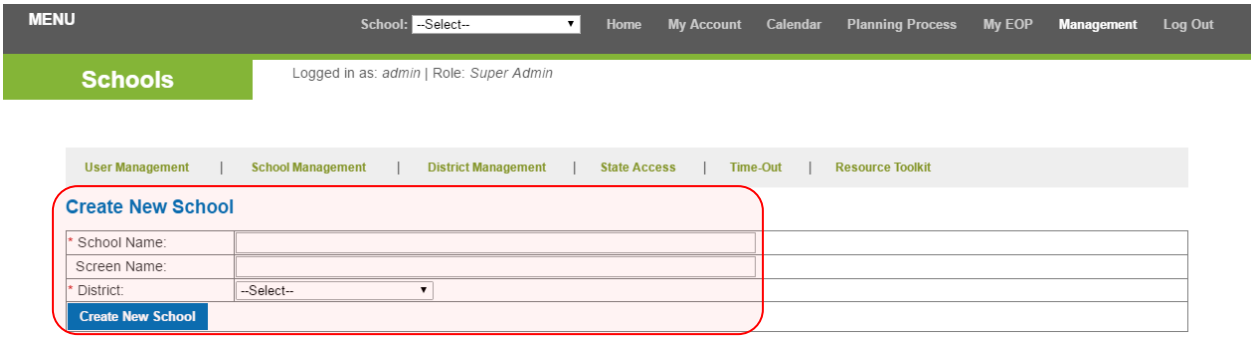
You will be presented with a list of all school profiles that have already been created (if any). This list lets you view all of the school profiles that have access to the application. School profiles can be sorted alphabetically so that you can more easily find a specific school. You are also able to search through the list to find specific school profiles, as well as create new school profiles and edit or delete existing school profiles.

Creating New School Profiles

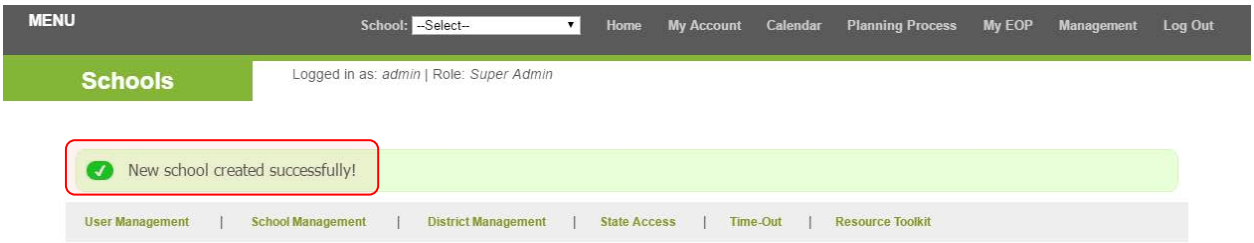
1. Click the **Create New School** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears.
   - Type the full name of the school in the School Name field.
   - Type the acronym or abbreviation of the school in the Screen Name field.
   - Select the appropriate district in the District dropdown menu. In the case of state-level hosting, select None for independent schools.
3. Click the **Create New School** button.



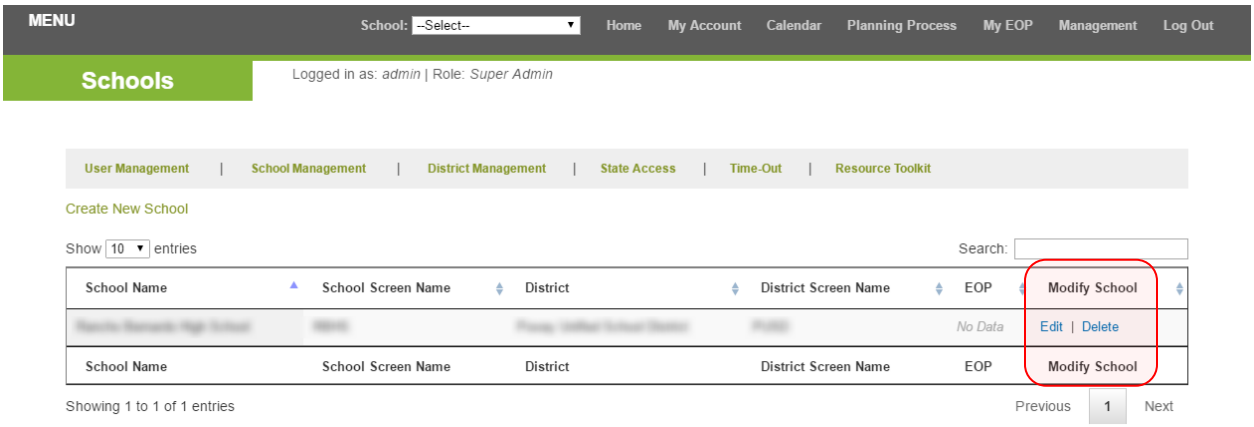
4. The school profile information will save, the screen will return to the School List, and a confirmation message that a new school profile was created successfully will appear.



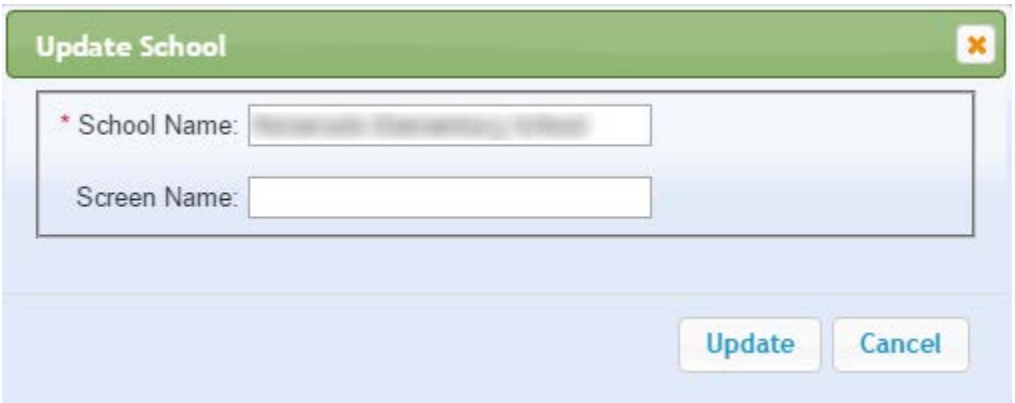
***Please note**: Although the Super Administrator has the ability to create school profiles, he or she should only be responsible for creating a school profile in the case of school-level hosting. State Administrators should assume the responsibility of creating school profiles in the case of state-level hosting, and District Administrators should assume the responsibility in the case of district-level hosting.*

Modifying School Profiles

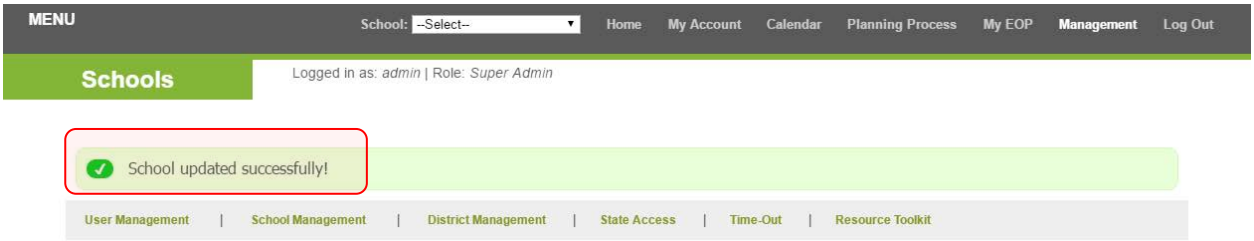
1. Click the **Edit** button in the Modify School column for the corresponding school profile that you wish to modify.



2. Edit any of the fields that you wish to modify in the pop-up that appears.
3. Click the **Update** button.



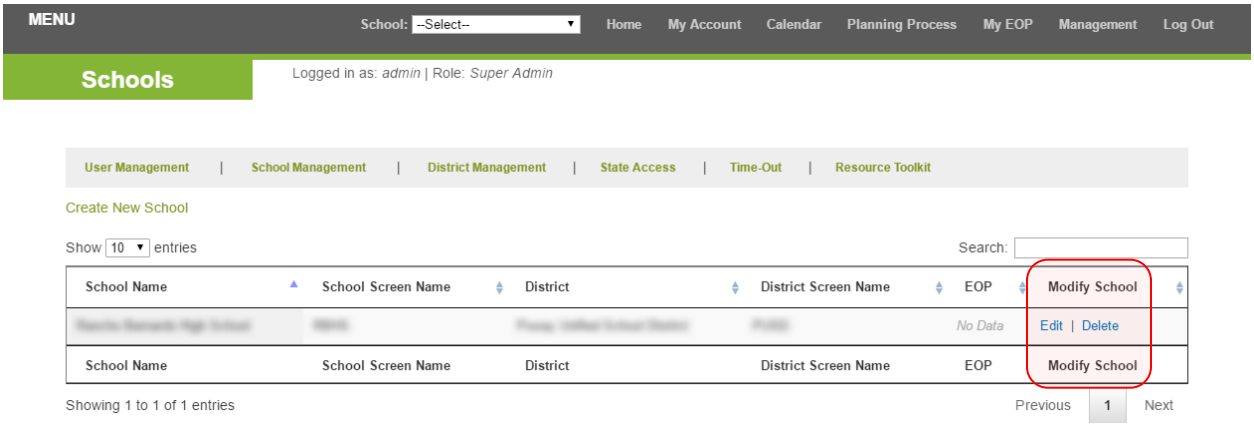
4. The school profile information will save, the screen will return to the School List, and a confirmation message that a school profile was updated successfully will appear.



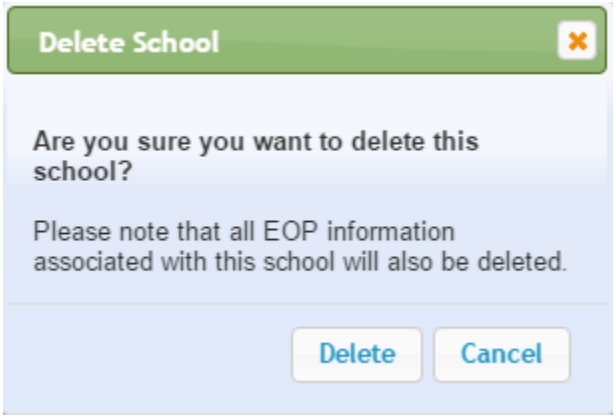
Deleting School Profiles

The Super Administrator also has permission to delete school profiles. This is the only user role that may complete this task and, once it is complete, the school profile cannot be recovered. Additionally, all school EOPs associated with this school profile will be deleted. The Super Administrator may want to delete a school profile if he or she created a school profile in error, or if a school closes permanently.

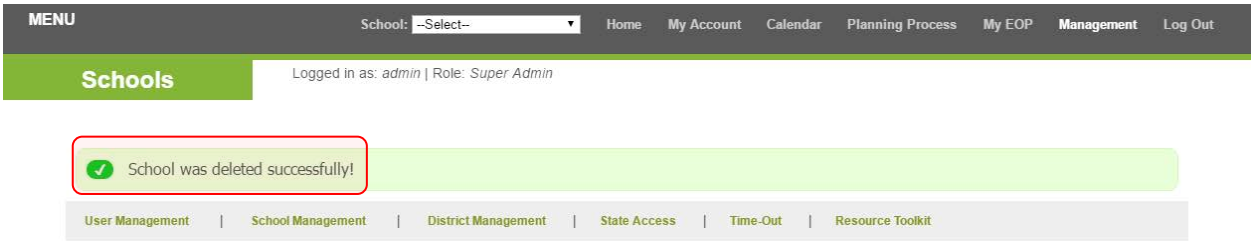
1. Click the **Delete** button in the Modify School column for the corresponding school profile that you wish to delete.



2. Click the **Delete** button.



3. The school profile will be deleted, the screen will return to the School List, and a confirmation message that a school profile was deleted successfully will appear.

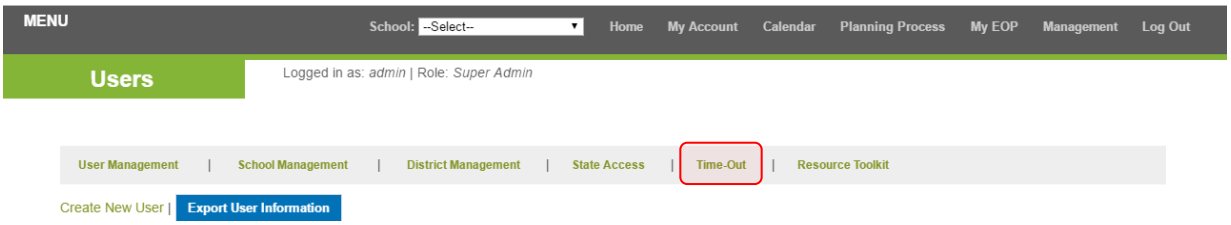


***Please note**: The Super Administrator is the only user role with the ability to delete a school profile. This is a permanent action that cannot be undone.*

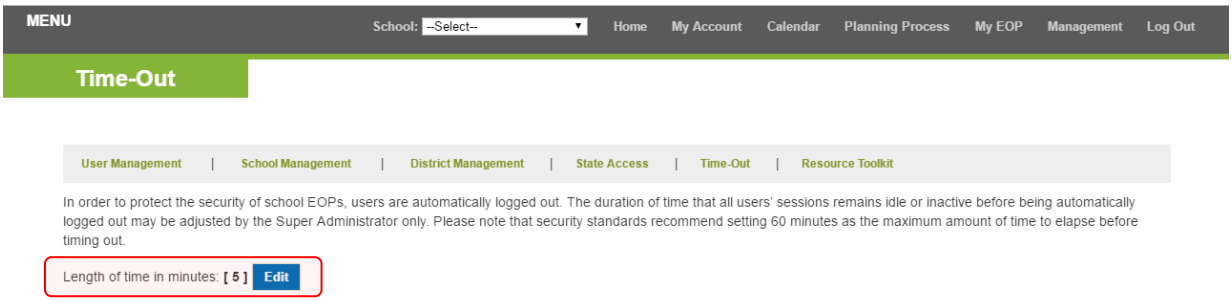
Managing Time-Out Feature

In order to protect the security of school EOPs, users are automatically logged out after a set period of time. The duration of time that all users' sessions remain idle or active before being automatically logged out may be adjusted by the Super Administrator only. Security standards recommend setting 60 minutes as the maximum amount of time to elapse before timing out.

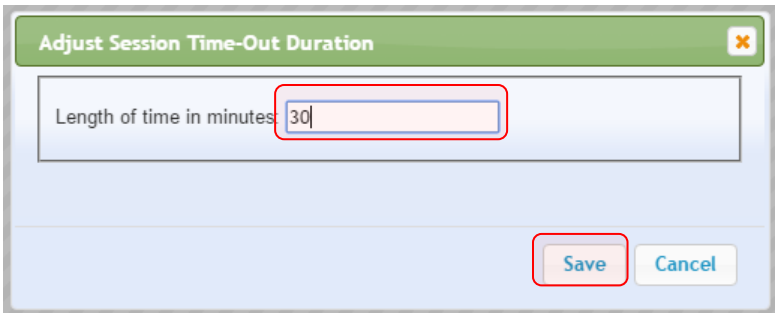
1. Select the **Time-Out** tab.



2. Click the **Edit** button.



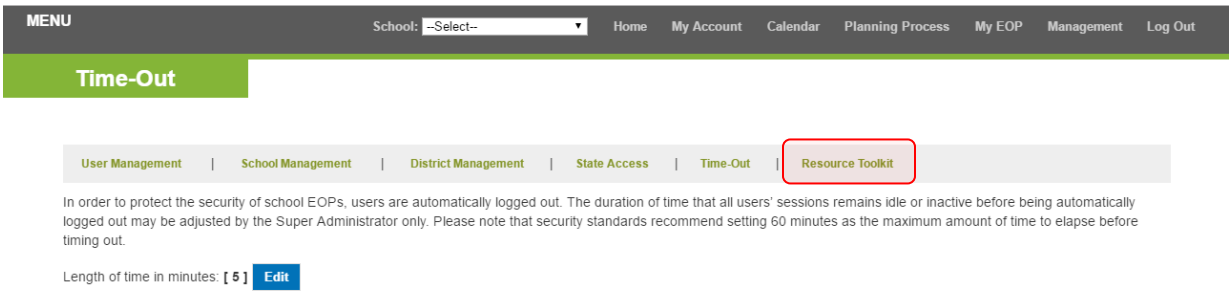
3. A pop-up window will appear.
   - Fill out the field.
   - Click the **Save** button.



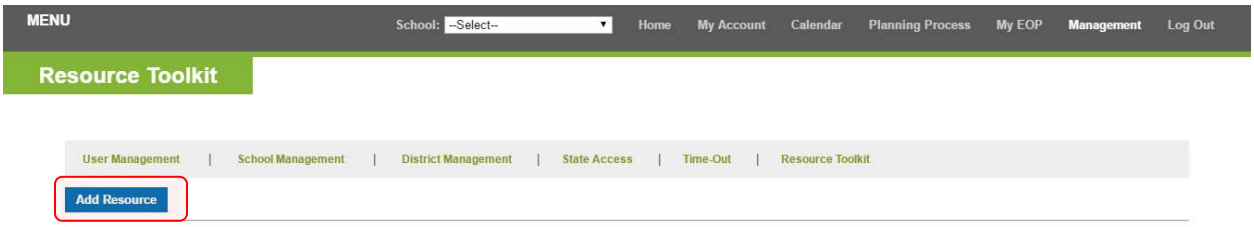
Managing Resource Toolkit

EOP ASSIST 3.0 allows institutions to upload resources that are specific to their state, region, or district to the Resource Toolkit. This feature is only enabled for the Super Administrator, so it is your responsibility to add such resources if your institution wishes to use this feature. You may choose the location within the Planning Process section for each resource, and may add a single resource to multiple pages. Resources may be uploaded as files or URLs. The REMS TA Center has added a number of national resources to the Resource Toolkit, which cannot be removed.

1. Select the **Resource Toolkit** tab.

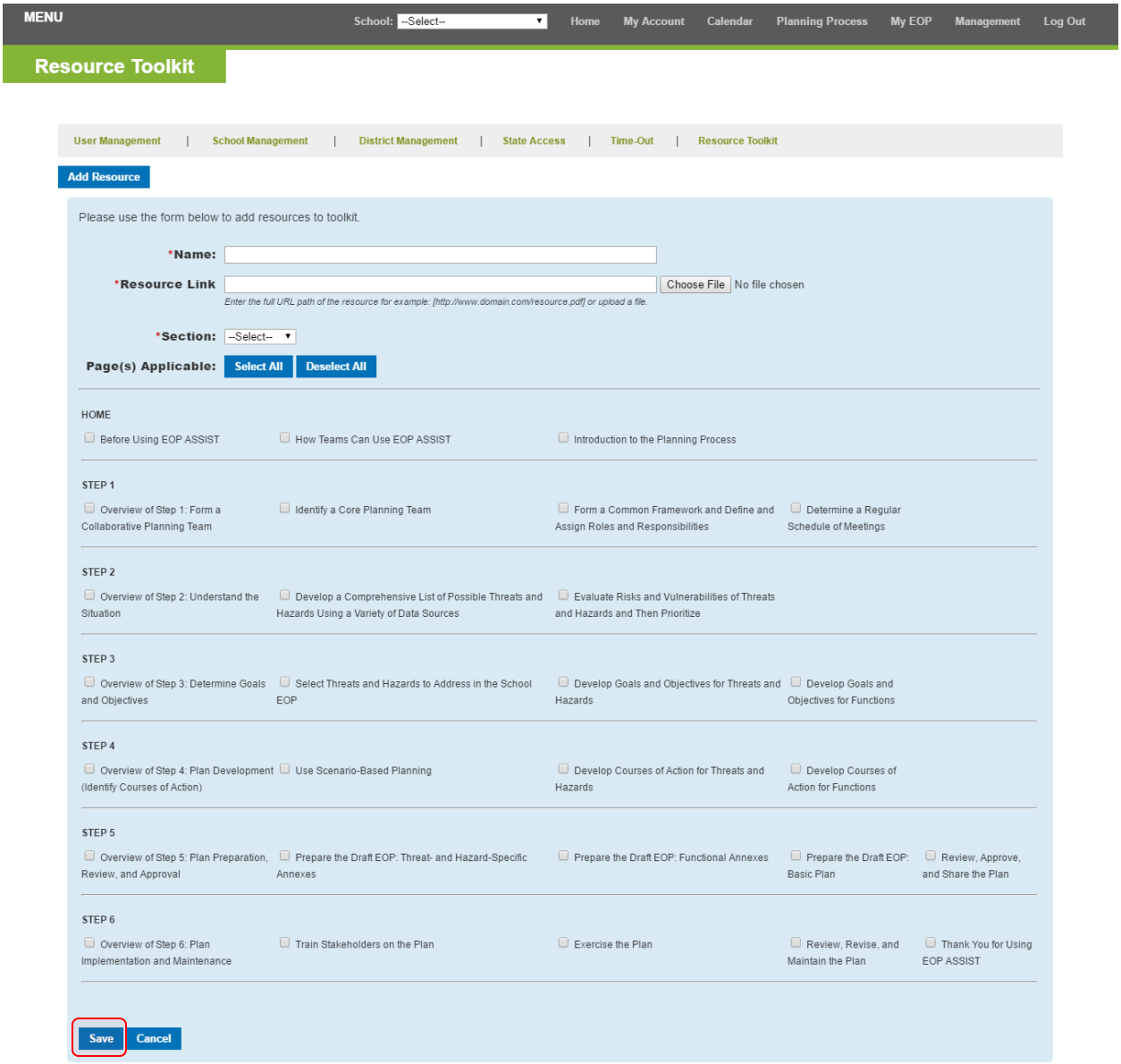


2. Click the **Add Resource** button.

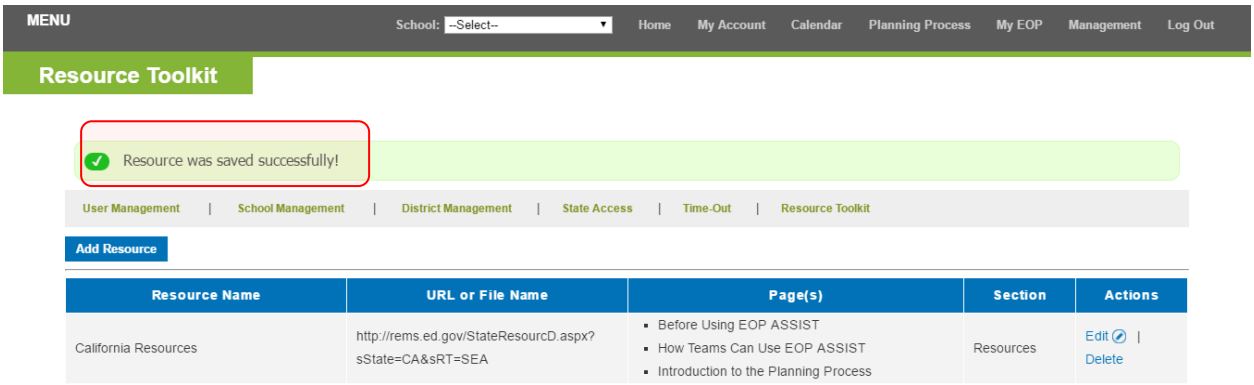


3. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Type the name of the resource in the **Name** field. This is the text that will be displayed in the Resource Toolkit.
    - Type the URL of the resource or click the **Choose File** button, if the resource does not have a URL.
    - Select the appropriate label in the **Section** dropdown menu. This is the section of the Resource Toolkit that the resource will appear.
        i. **Guidance**—recommendations and laws from government agencies and other organizations on school emergency management planning.
        ii. **Resources**—tools, documents, online courses, and training materials that provide supplemental information on specific topics.
        iii. **Examples**—tangible result and product of emergency management planning work (e.g., sample goals and objectives, sample courses of action, sample annexes).
    - Select the check boxes for the applicable pages within the Planning Process section that are relevant to the resources. These are the pages where the resources will appear in the Resource Toolkit.

4. Click the **Save** button.



5. The Resource information will save, the screen will return to the Resource Toolkit list, and a confirmation message that a new resource was saved successfully will appear.

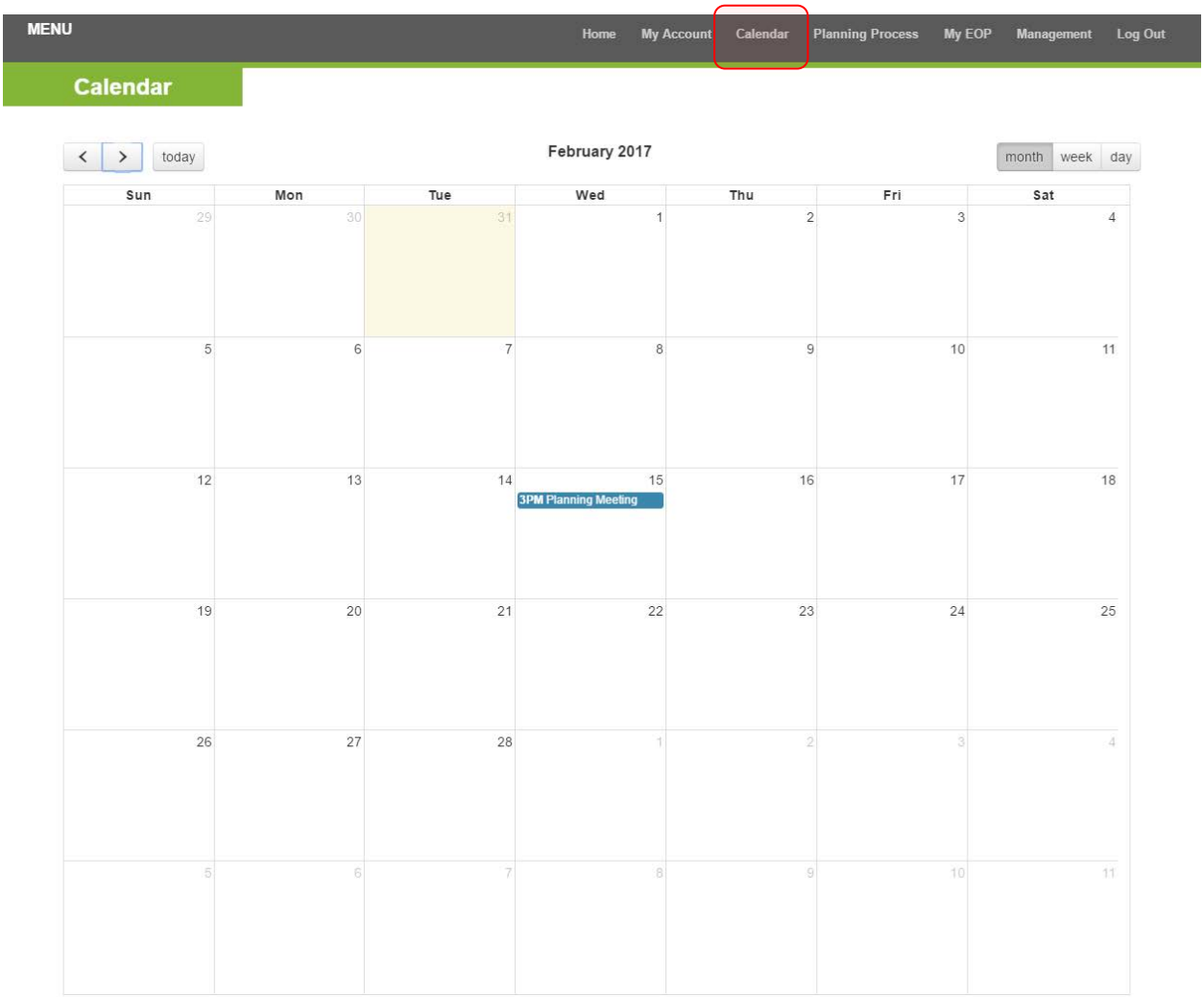


State Administrator

State Administrators have the unique role of ensuring that schools throughout the state can develop high-quality EOPs. This can be done by managing the district profiles and independent school profiles that have access to the application, as well as developing a sample plan and scheduling events at the state level that support school emergency management planning.

Calendar

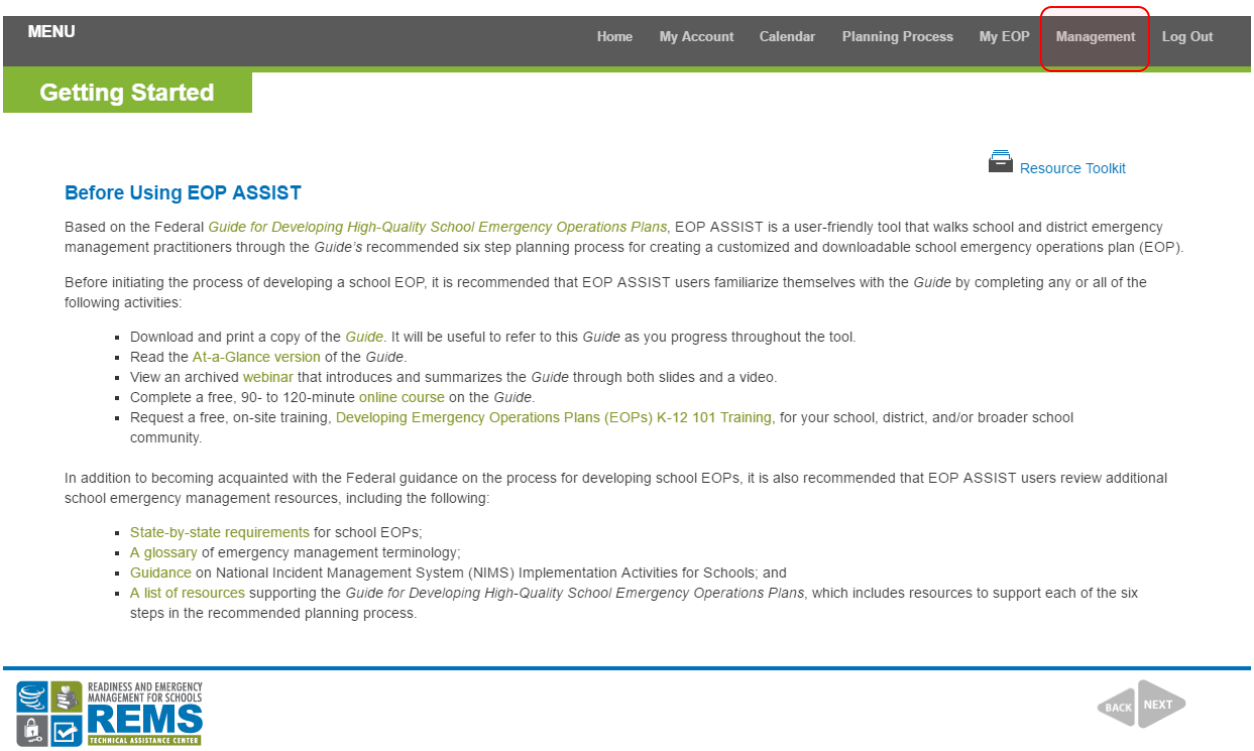
The Calendar section will help you schedule meetings and create reminders and notifications to support school emergency management planning in your state. Only State Administrators will be able to see events on this calendar, and you will not be able to share this with schools or districts in your state directly through the application. For more information on how to create and modify events on the Calendar, please refer to the Calendar section in Chapter 5.



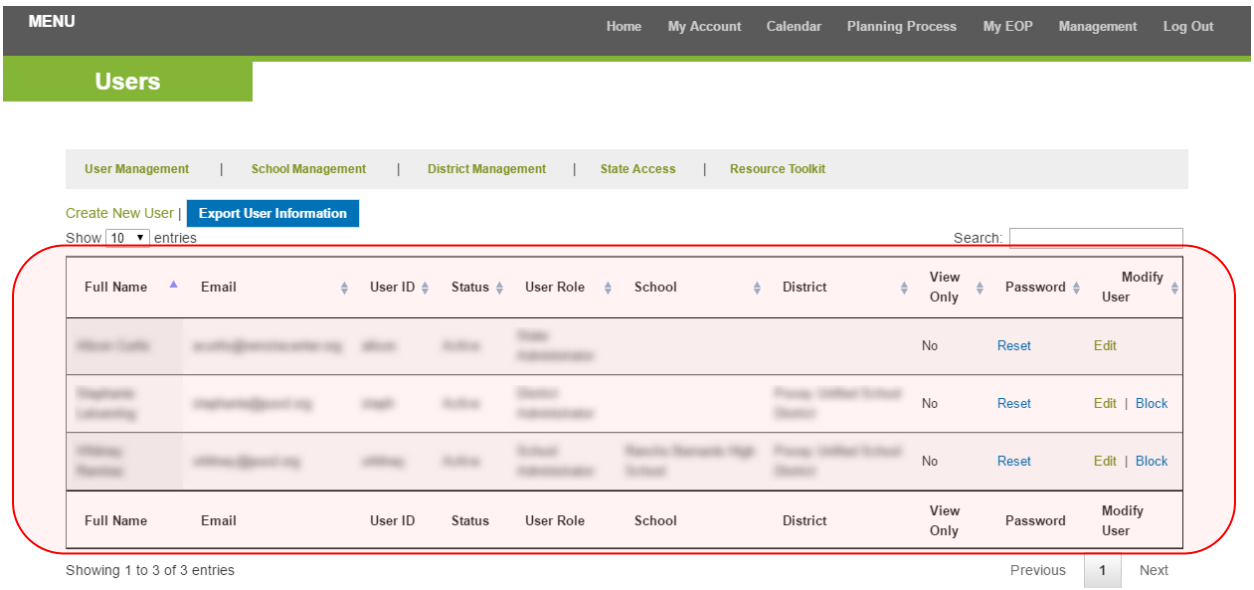
Managing User Accounts

State Administrators serve as the point of contact for statewide access to EOP ASSIST. As such, State Administrators are able to create user accounts with any user role. More information on the Super Administrator's initial responsibilities is available in Chapter 2.

1. Select **Management** in the Navigation Bar.

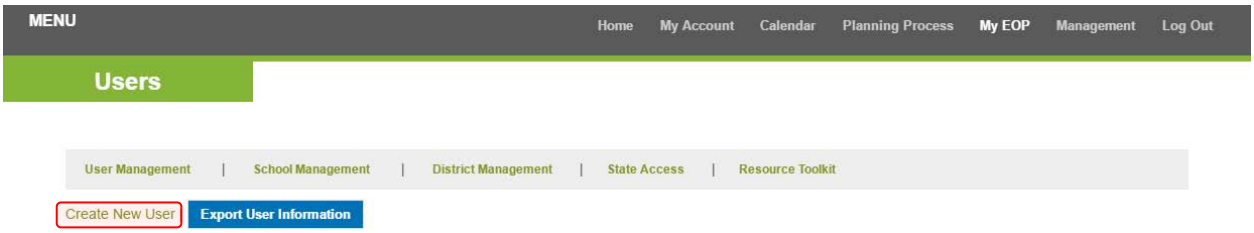


2. As a State Administrator, you will first see a list of user accounts within your institution's jurisdiction, which is called the **User List**. This lets you view all of the user accounts that have access to the application. User accounts can be sorted alphabetically by various categories so that you can more easily find a specific user. You are able to search through the list to find specific user accounts, as well as create new user accounts and edit or block existing user accounts. Further, this page lets you reset passwords, if needed.

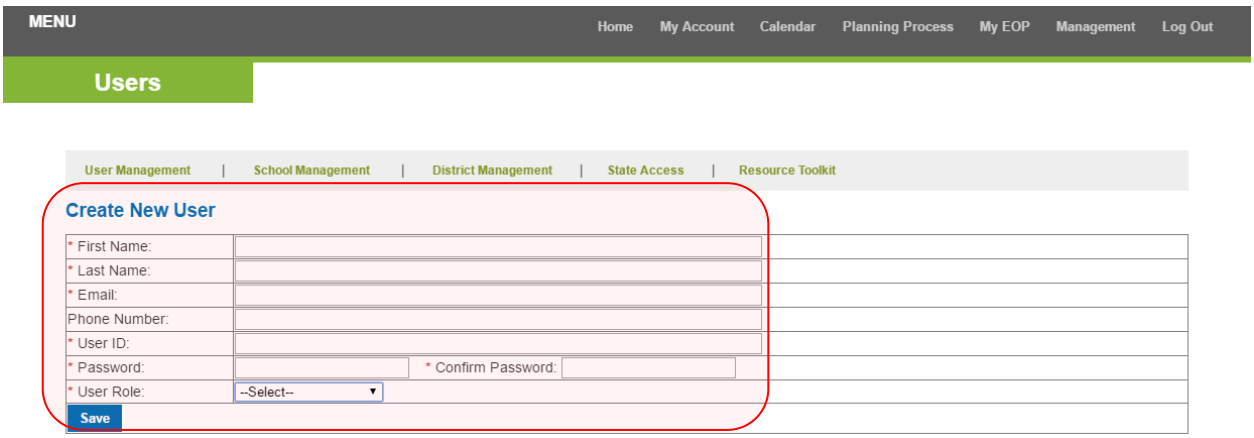


Creating New User Accounts

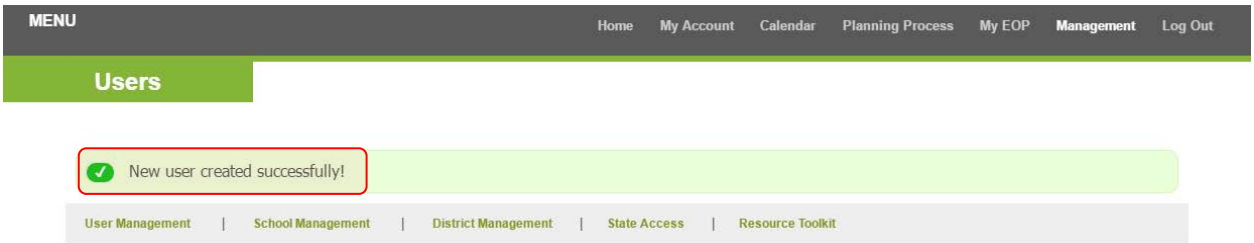
1. Click the **Create New User** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Select the appropriate user role in the User Role dropdown menu: State Administrator, District Administrator, School Administrator, or School User. For more information on each user role, please refer to Chapter 4.
    - Select the appropriate information for the District and/or School dropdown menus, if they appear for the selected User Role.
    - Select the appropriate choice for the View Only dropdown menu, only if School User is selected for the User Role. The View Only feature allows School User accounts to view, but not add or edit, data within the application for their school.
3. Make a note of the User ID and Password information, so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The user account name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



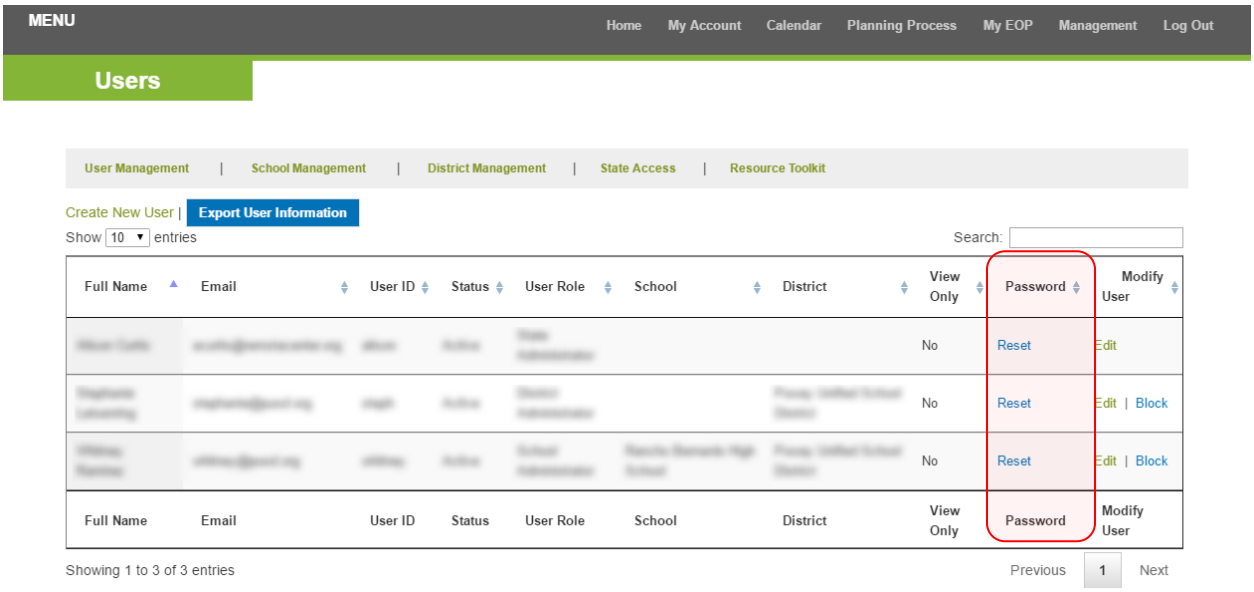
6. Share the newly created User ID and password with the user so that he or she can log in and change his or her account information. When a profile is created, the user is automatically given an “active” status. This means that new users have access to EOP ASSIST through their respective log-in information.

***Please note**: Although the State Administrator can create a new user with any User Role, he or she should only be responsible for creating user accounts for colleagues at the state level, as well as the first new user account for each district profile and independent school account. The responsibility of creating subsequent user accounts should be left to the other Administrators at the district or school levels. For more information on the State Administrator's initial responsibilities, please refer to Chapter 2.*

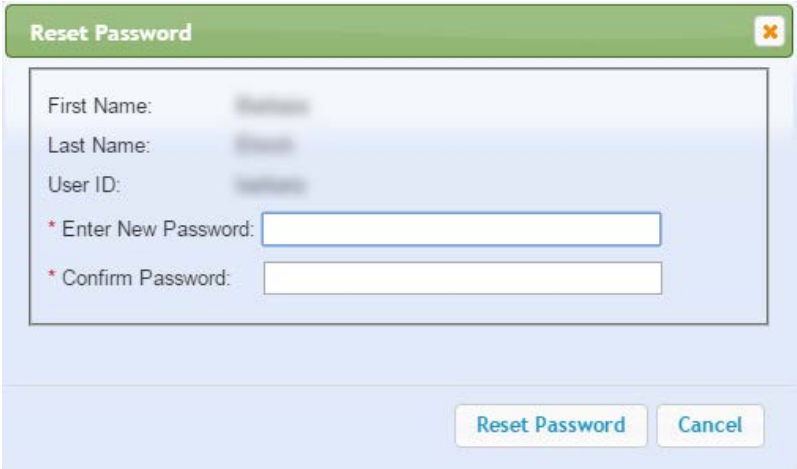
Resetting Passwords

As a State Administrator, you also have permission to reset passwords, in case people forget them. While you have the ability to reset passwords for any user account with any user role, you should only be responsible for resetting the passwords of user accounts with the State Administrator user role. All other users should contact their respective Administrators to request their passwords be reset.

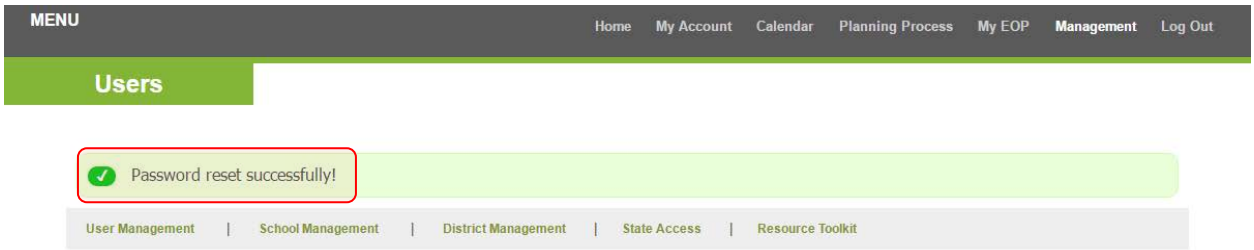
1. Click the Reset button in the Password column for the corresponding user.



2. Confirm that the First Name, Last Name, and User ID that appear are correct for the user account whose password you wish to reset.
3. Fill all of the required fields (noted with an asterisk) with a new password in the pop-up that appears.
4. Make a note of the new password so that you can send it to the actual user who will use this password to log in.
5. Click the **Reset Password** button.



6. The new password will save, the screen will return to the User List, and a confirmation message that a password was reset successfully will appear.

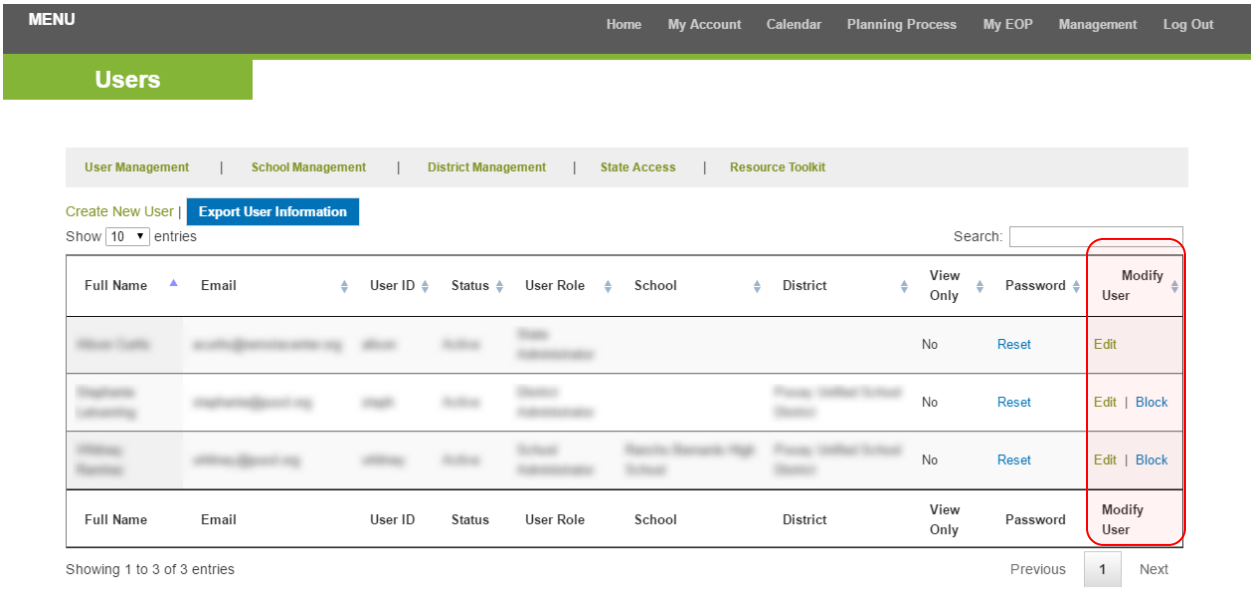


7. Share the new password with the user so that he or she can log in and change his or her password for confidentiality purposes.

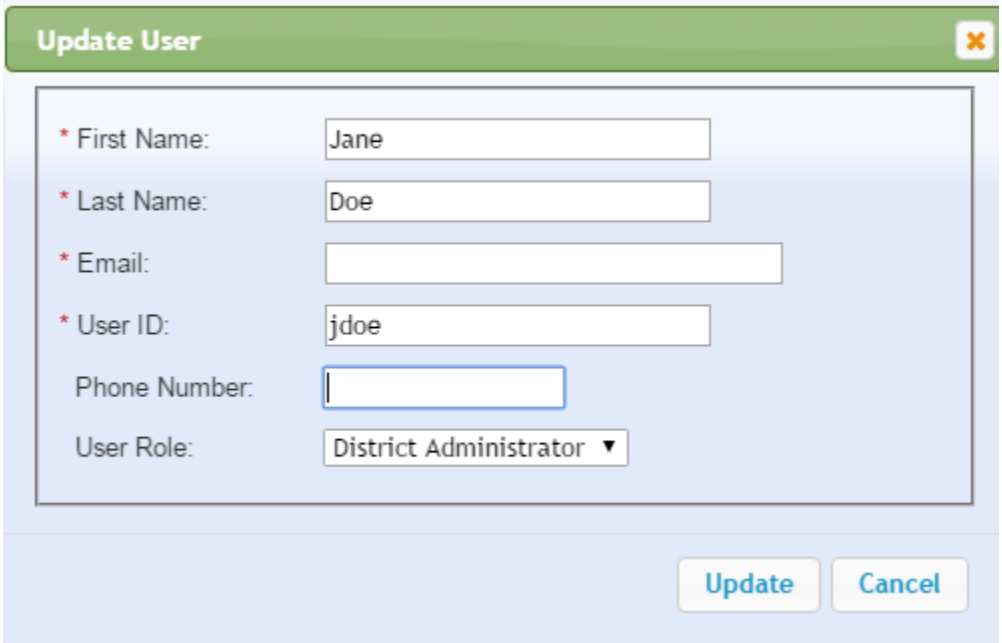
Modifying User Accounts

State Administrators are also given permission to modify user accounts.

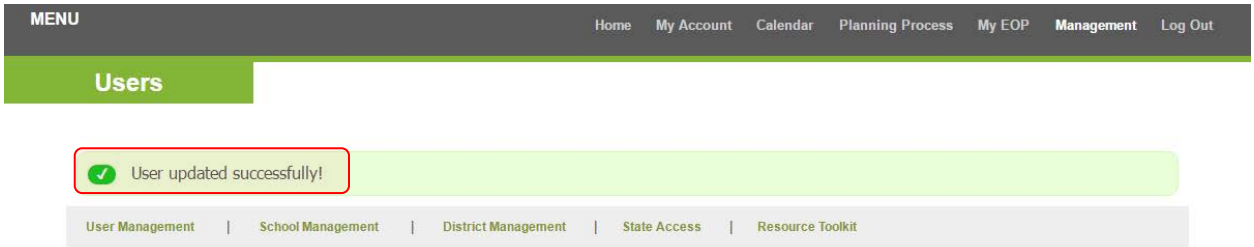
1. Click the **Edit** button in the Modify User column for the user account that you wish to modify.



2. A pop-up notification will appear, titled "Update User."
   - Edit the data, as needed.
   - Click the **Update** button.



3. The user account information will save, the screen will return to the User List, and a confirmation message that the user account was updated successfully will appear.



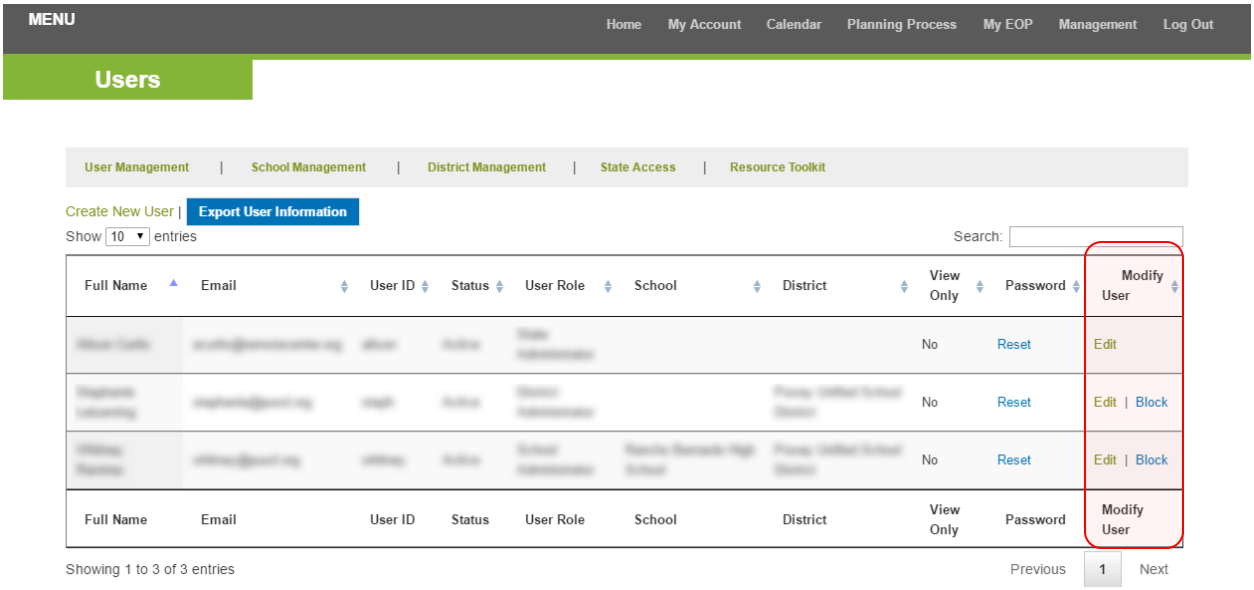
State Administrators have permissions to update the following information for user accounts within their state: name, email address, phone number, User ID, User Role, district, or school affiliation (if applicable).

***Please note**: You cannot change your own User Role. If you wish to change such information, please contact another State Administrator or the Super Administrator.*

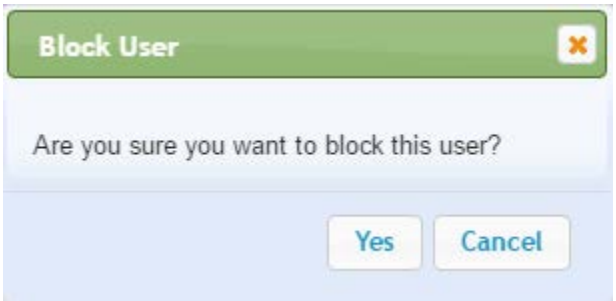
Blocking User Accounts

State Administrators also have permission to block user accounts. This feature prohibits the user from successfully logging in to the application until their user account is "unblocked." State Administrators may want to block a user account if a user leaves a school, district, REA, state agency, or other institution, but do not want to delete their user account permanently.

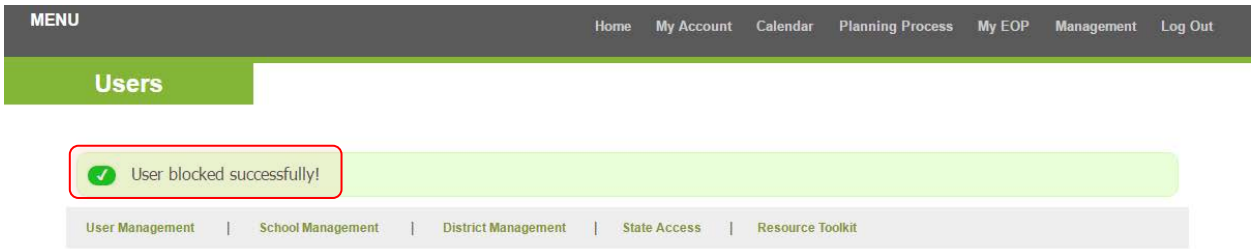
1. Click the **Block** button in the Modify User column for the user account that you wish to block.



2. Click the **Yes** button.



3. The user account name and other personal information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.

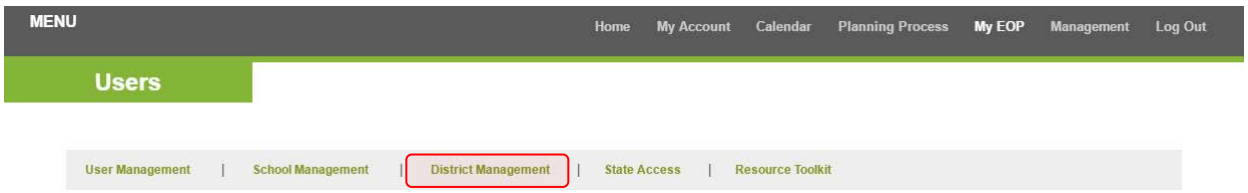


***Please note**: You cannot block your own user account.*

Managing District Profiles

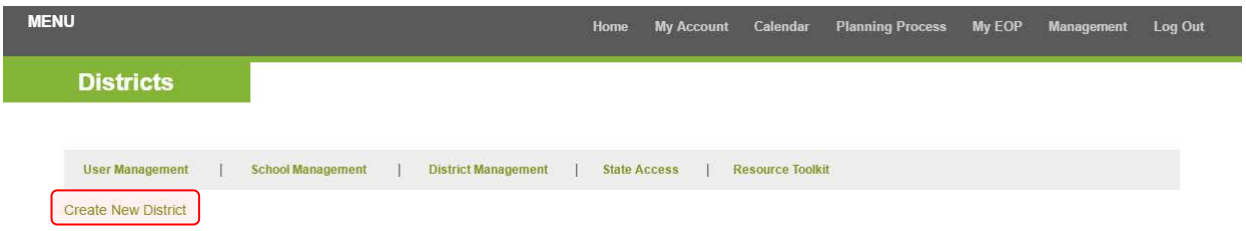
As a State Administrator, you can manage the district profiles within your state that will use EOP ASSIST. This includes creating district profiles, as well as editing existing district profiles. More information on the Super Administrator's initial responsibilities is available in Chapter 2.

1. Select the **District Management** tab.

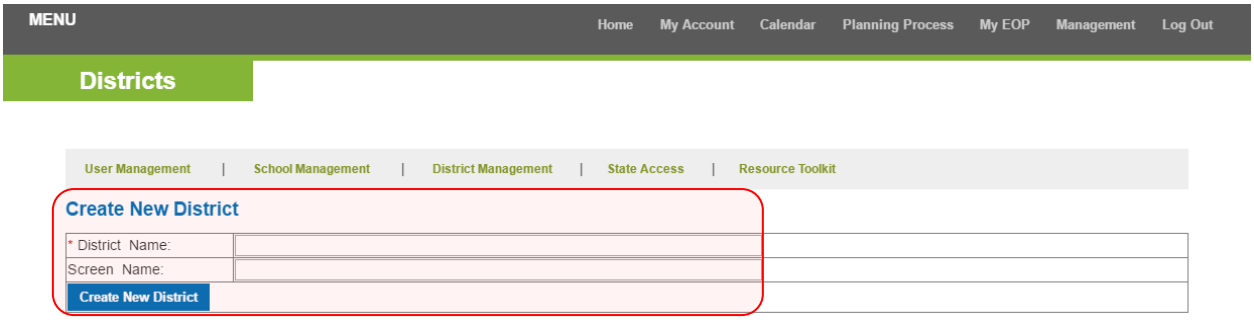


Creating New District Profiles

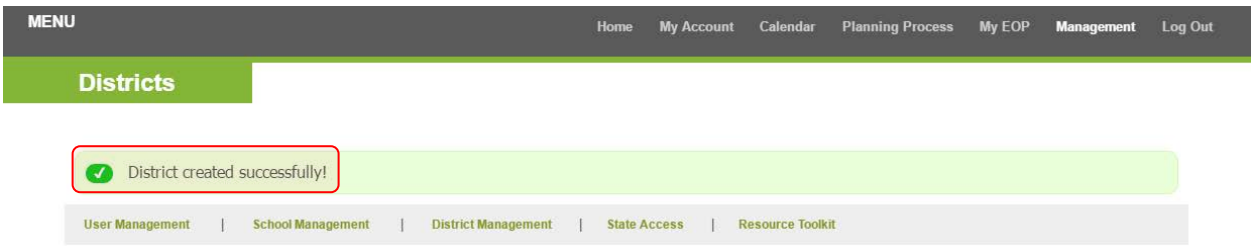
1. Click the **Create New District** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Type the full name of the district in the District Name field.
    - Type the acronym or abbreviation of the district in the Screen Name field.
3. Click the **Create New District** button.

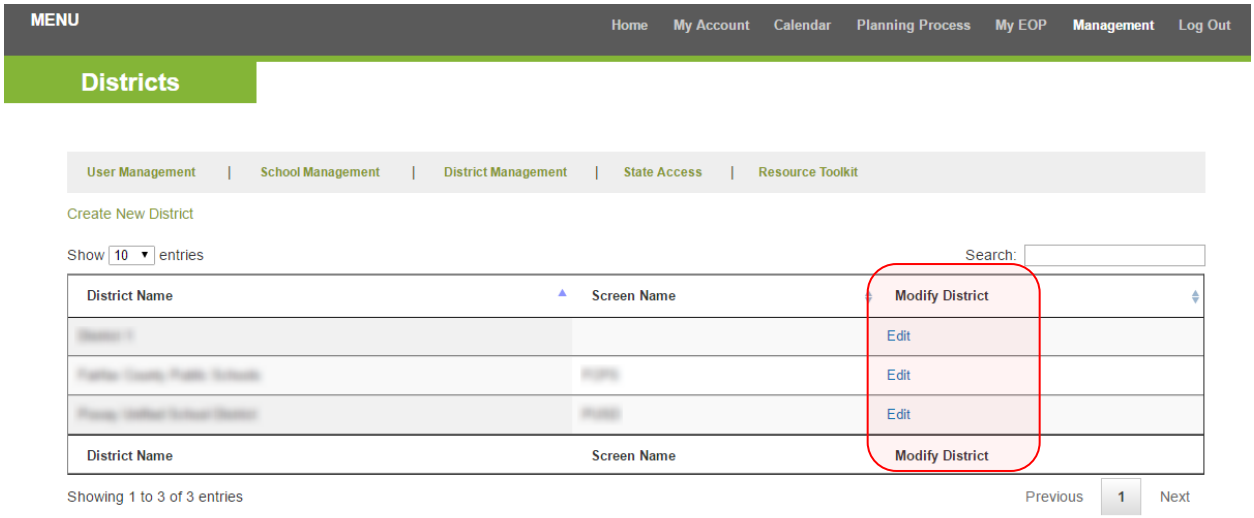


1. The district profile information will save, the screen will return to the District list, and a confirmation message that a new district profile was created successfully will appear.

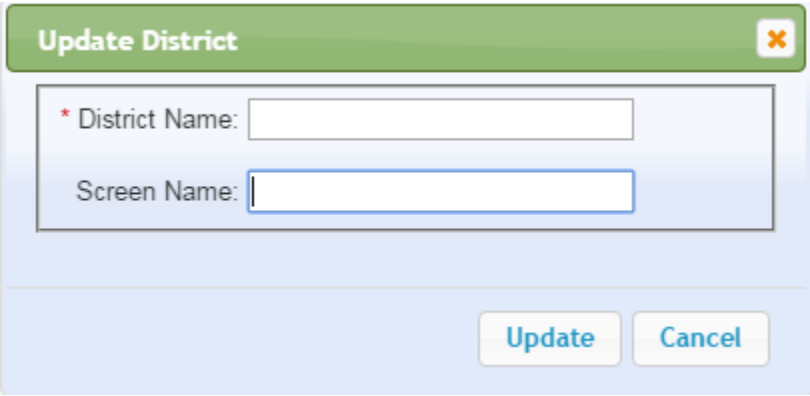


Modifying District Profiles

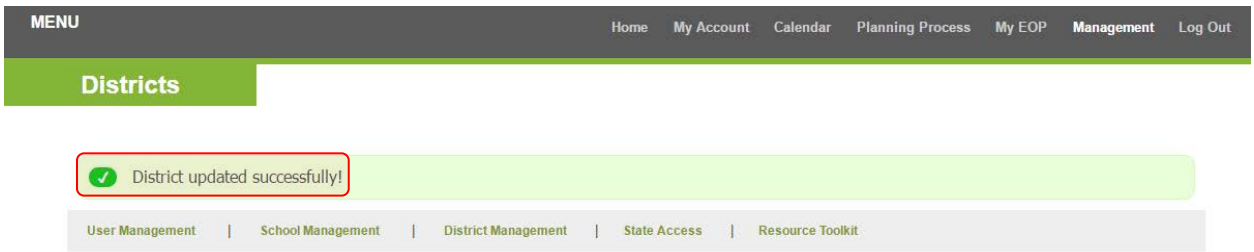
1. Click the **Edit** button in the Modify District column for the corresponding district that you wish to modify.



2. Edit any of the fields that you wish to modify in the pop-up that appears.
3. Click the **Update** button.



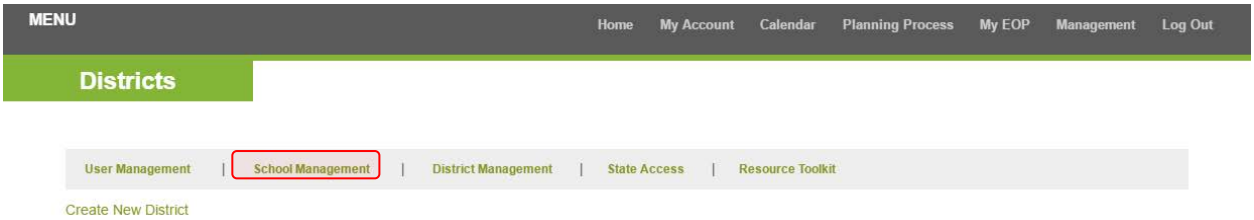
4. The district profile information will save, the screen will return to the District list, and a confirmation message that a district profile was updated successfully will appear.



Managing School Profiles

As a State Administrator, you also can manage the school profiles within your state that will use EOP ASSIST. This includes creating school profiles, as well as editing existing school profiles. While State Administrators shouldn't assume the responsibility of managing school profiles that are affiliated with districts in EOP ASSIST, they will be responsible for creating school profiles for independent schools. More information on the Super Administrator's initial responsibilities is available in Chapter 2.

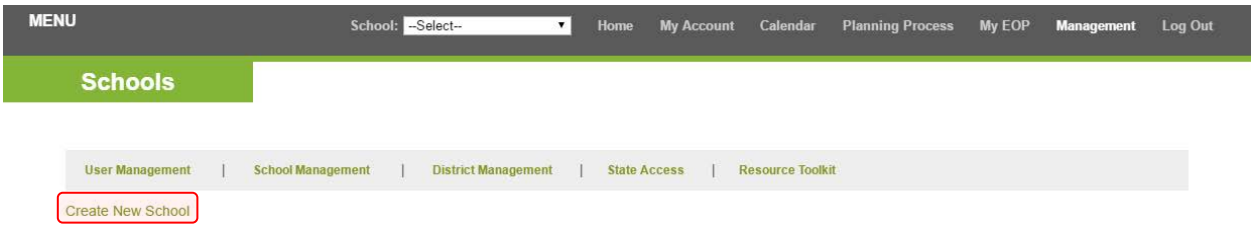
1. Select the **School Management** tab.



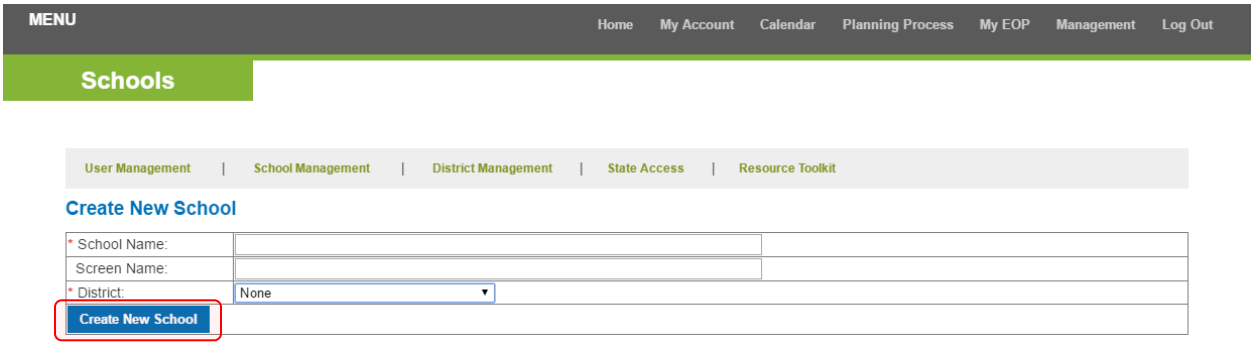
You will be presented with a list of all school profiles that have already been created (if any). This list lets you view all of the school profiles that have access to the application. School profiles can be sorted alphabetically so that you can more easily find a specific school. You are also able to search through the list to find specific school profiles, as well as create new school profiles and edit existing school profiles. For schools without district affiliation, no information will appear in the District and District Screen Name columns in the list of school profiles.

Creating New School Profiles

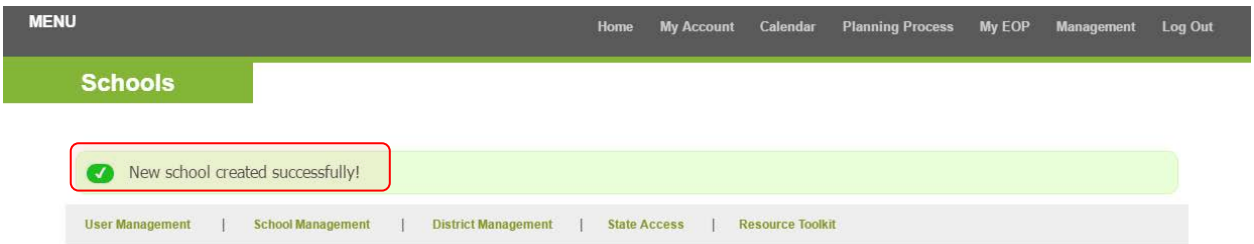
1. Click the **Create New School** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears.
    - Type the full name of the school in the School Name field.
    - Type the acronym or abbreviation of the school in the Screen Name field.
    - Select **None** in the District dropdown menu for independent schools.
3. Click the **Create New School** button.



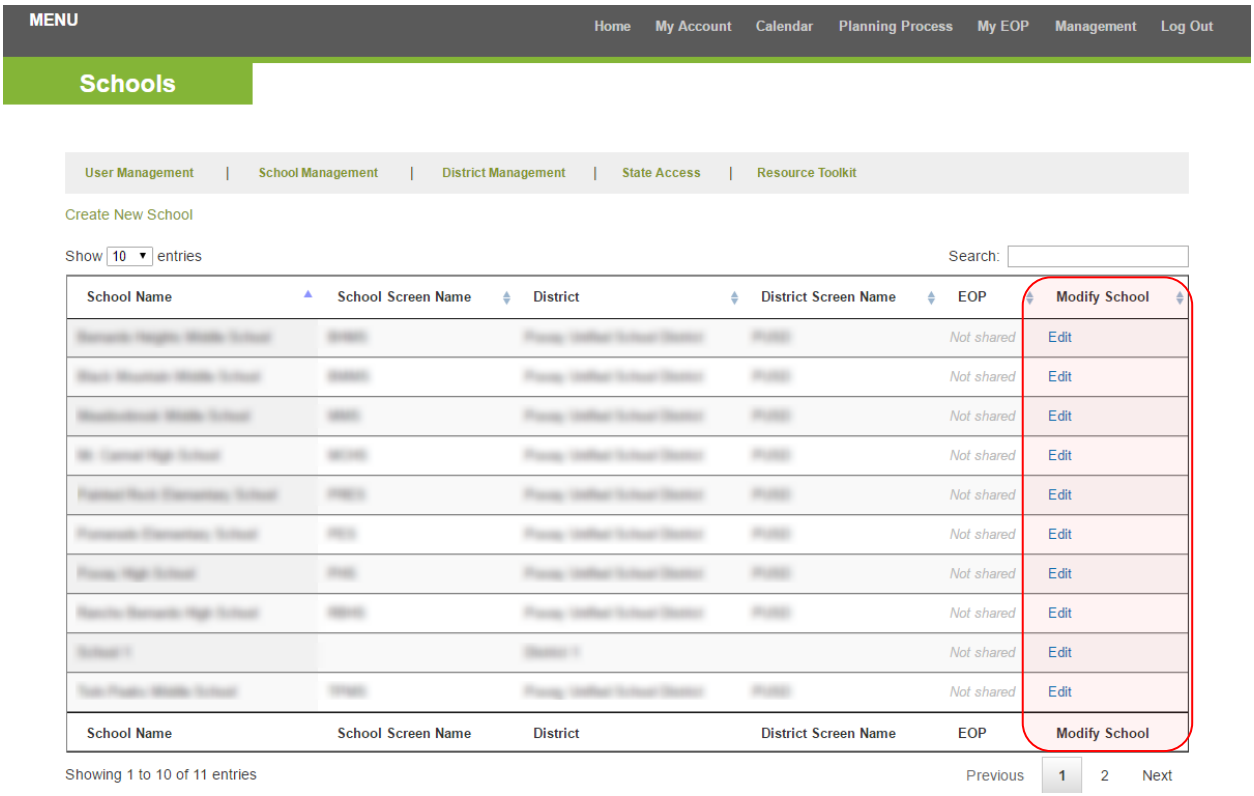
4. The school profile information will save, the screen will return to the School list, and a confirmation message that a new school profile was created successfully will appear.



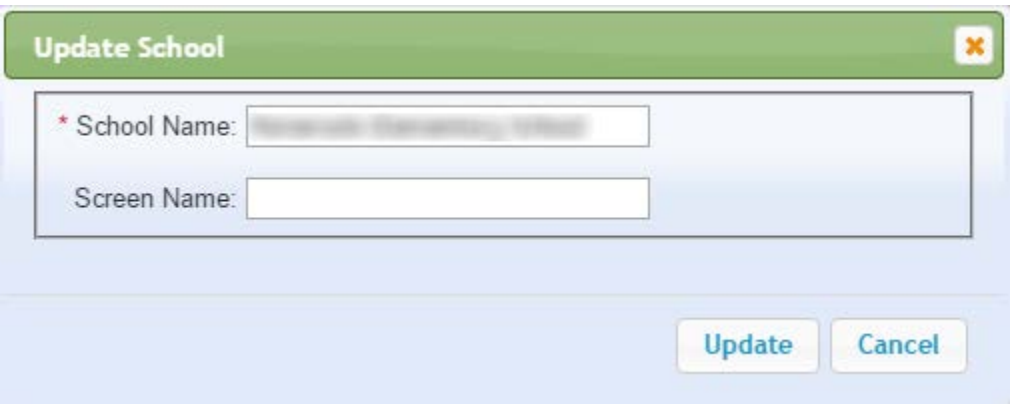
***Please note**: Although State Administrators have the ability to create school profiles for schools that are affiliated with districts, they should only be responsible for creating school profiles for independent schools. District Administrators should assume the responsibility of creating school profiles for schools that are affiliated with a district.*

Modifying School Profiles

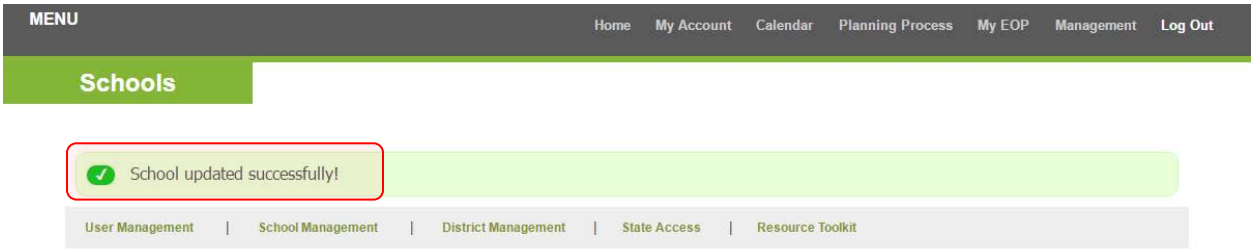
1. Click the **Edit** button for the corresponding school profile in the Modify School column that you wish to modify.



2. Edit any of the fields that you wish to modify in the pop-up that appears.
3. Click the **Update** button.



4. The school profile information will save, the screen will return to the School list, and a confirmation message that a school profile was updated successfully will appear.



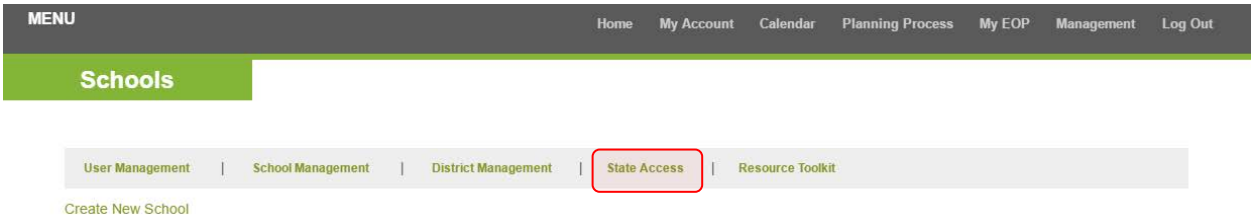
***Please note**: If you wish to delete a school profile, in the case that a school has closed, please contact your Super Administrator. The Super Administrator is the only user role to have this management functionality.*

Managing State Access to School EOPs

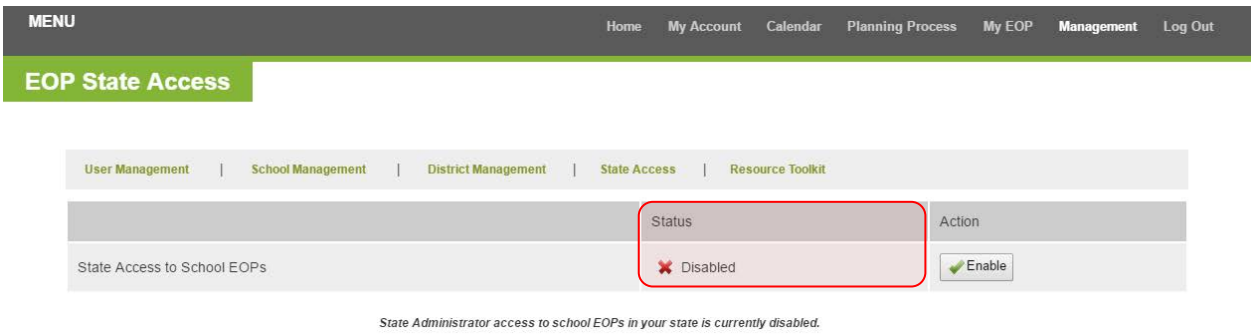
State agencies are sometimes responsible for reviewing school EOPs, or just need to certify that they're in place, and may do so directly through EOP ASSIST. In order for State Administrators to gain access to school EOPs through the application, both representatives at the local and state levels must enable this feature. In order for State Administrators to view school EOPs from an independent school, both a School Administrator from that school and a State Administrator must enable the State Access feature. In order for State Administrators to view school EOPs from a school affiliated with a district, a State Administrator, School Administrator from that school, and District Administrator from that district must all enable the State Access feature.

Enabling State Access

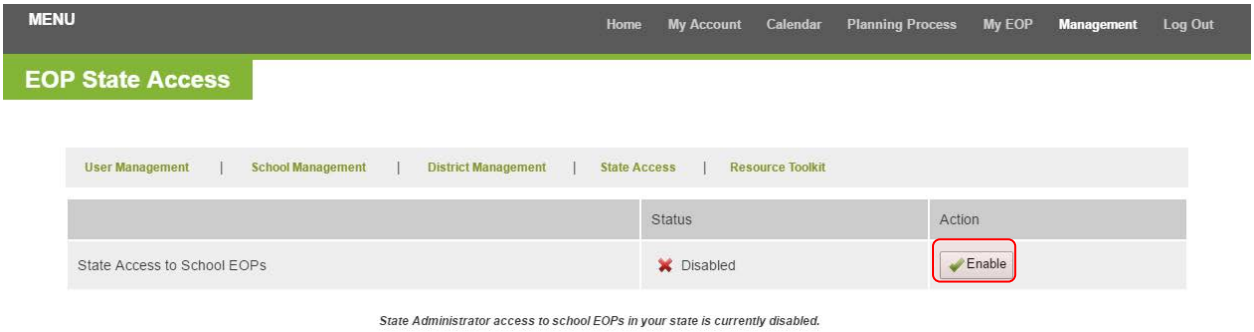
1. Select the **State Access** tab.



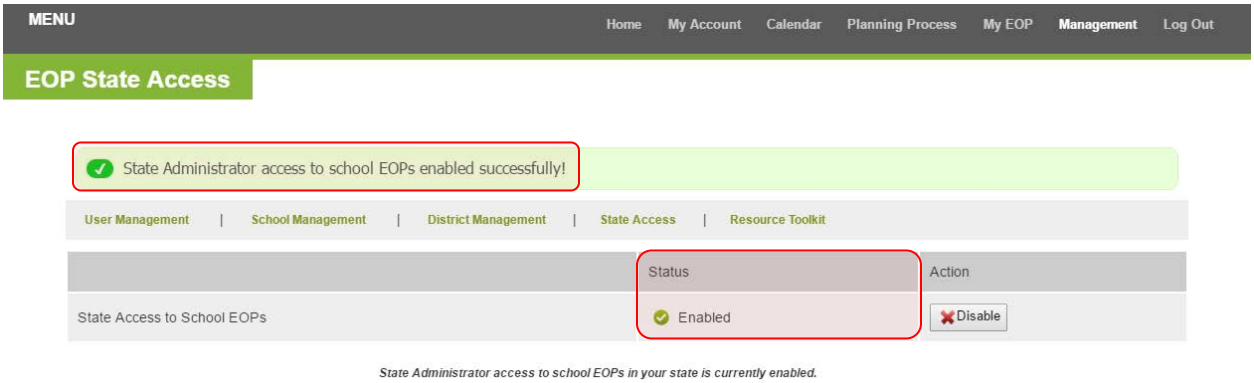
2. You will see a table that displays the status of state access to school EOPs, as granted by State Administrators.



3. Click on the **Enable** button in the Action column.



4. The status will change and a message that state access to school EOPs was enabled successfully will appear.

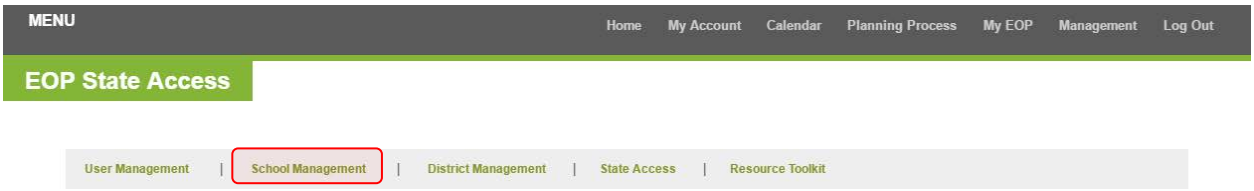


***Please note**: Enabling the State Access feature does not guarantee that you will have access to all school EOPs. If a school or district does not want the state to have access to a school EOP, then the school or district can block State Administrators from accessing it.*

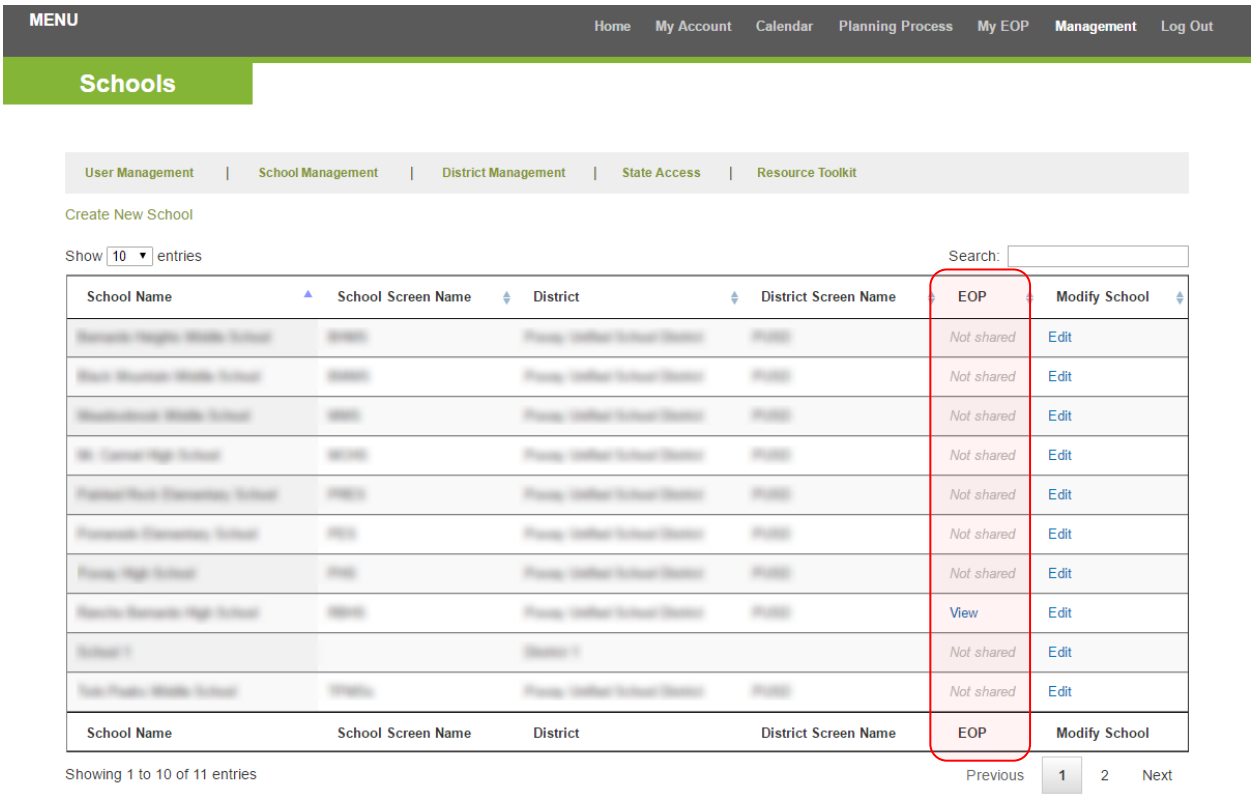
Viewing School EOPs

Once state access to school EOPs is enabled (at both the state and local levels), State Administrators will be able to access the appropriate school EOPs.

1. Click on the School Management tab.



2. State Administrators will be able to see which schools and districts have enabled the state access feature in the EOP column.
   - **Not Shared** will appear if a school and/or district has not enabled State Access.
   - **View** will appear if a school and/or district has enabled State Access and there is data in the school EOP. You may click this button to view the school EOP.
   - **No Data** will appear if a school and/or district has enabled State Access, but there is no data in the school EOP.

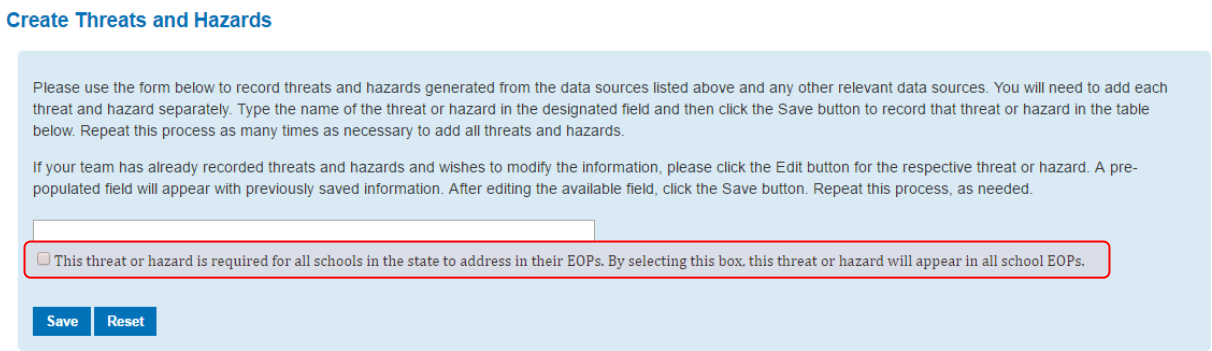


Creating Statewide Threats, Hazards, Functions, Goals, and/or Objectives

State Administrators are able to create threats, hazards, and functions that all school planning teams should address in their school EOPs, as well as goals and objectives, based on state laws or guidance. State Administrators are not required to add statewide data to the application, and schools are not required to include statewide EOP data in their school EOP.

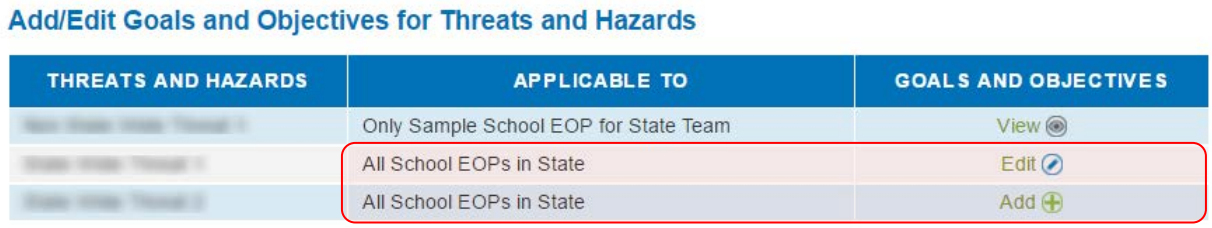
Creating Statewide Threats and Hazards

1. Navigate to Step 2: Develop a Comprehensive List of Possible Threats and Hazards Using a Variety of Data Sources.
2. Type the statewide threat or hazard into the field and select the checkbox.
3. Click the **Save** button.



Creating Statewide Goals and Objectives for Statewide Threats and Hazards

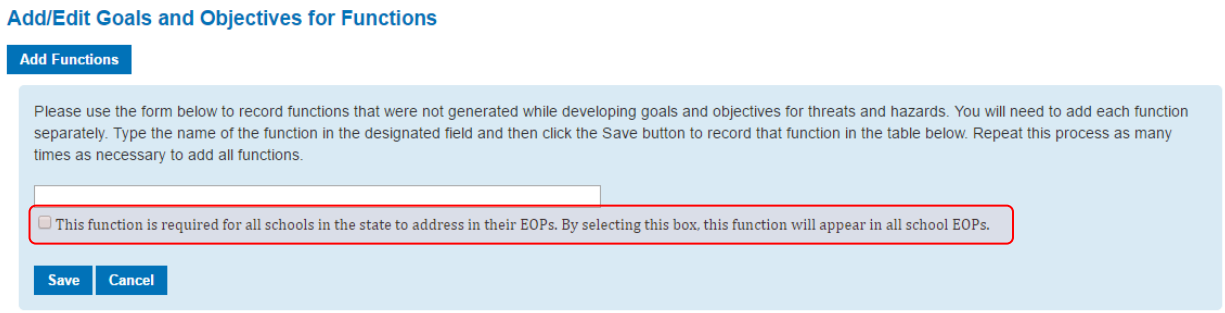
1. Navigate to Step 3: Develop Goals and Objectives for Threats and Hazards.
2. Click the **Add** button in the Goals and Objectives column for the threat or hazard that is applicable to "All School EOPs in the State."
3. Develop goals and objectives.
4. Click the **Save** button.



***Please note**: Threats or hazards that are applicable to "Only Sample School EOP for State Team" will not appear in any other school EOPs in the state. These data will only appear in the sample school EOP that the State Administrators develop.*

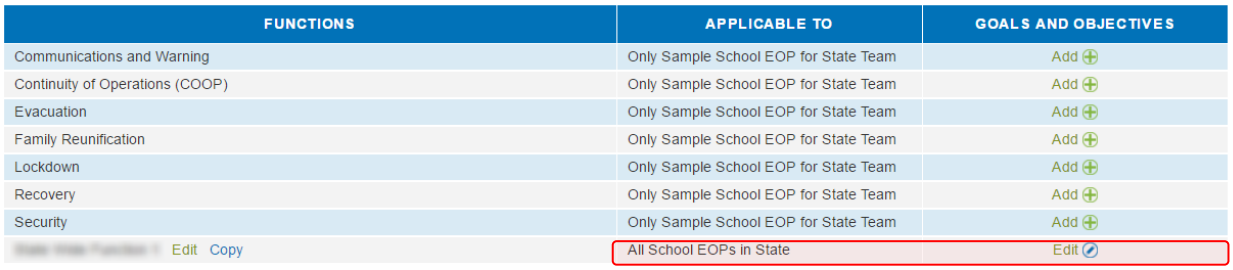
Creating Statewide Functions

1. Navigate to Step 3: Develop Goals and Objectives for Functions.
2. Click the **Add Functions** button.
3. Type the statewide function into the field and select the checkbox.
4. Click the **Save** button.



Creating Statewide Goals and Objectives for Statewide Functions

1. Navigate to Step 3: Develop Goals and Objectives for Functions.
2. Click the **Add** button in the Goals and Objectives column for the function that is applicable to "All School EOPs in the State."
3. Develop goals and objectives.
4. Click the **Save** button.



FUNCTIONS	APPLICABLE TO	GOALS AND OBJECTIVES
Communications and Warning	Only Sample School EOP for State Team	Add
Continuity of Operations (COOP)	Only Sample School EOP for State Team	Add
Evacuation	Only Sample School EOP for State Team	Add
Family Reunification	Only Sample School EOP for State Team	Add
Lockdown	Only Sample School EOP for State Team	Add
Recovery	Only Sample School EOP for State Team	Add
Security	Only Sample School EOP for State Team	Add
Edit Copy	All School EOPs in State	Edit

***Please note**: Functions that are applicable to "Only Sample School EOP for State Team" will not appear in any other school EOPs in the state. These data will only appear in the sample school EOP that the State Administrators develop.*

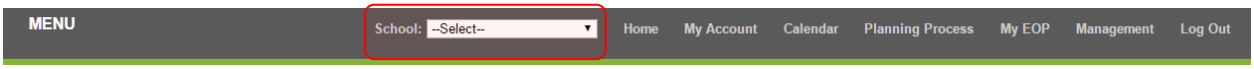
District Administrator

District Administrators have the unique role of overseeing the development of multiple school EOPs. Since they're a part of the planning teams of all schools, District Administrators can contribute to, view, and edit information for each school EOP within their district using EOP ASSIST. In order to do so, District Administrators must first identify the school before viewing or editing the school EOP. A school must be selected for access to the following sections: Home/Getting Started and Planning Process. District Administrators will be prompted to select a particular school in a pop-up notification that appears upon first logging in to EOP ASSIST.

Selecting a School

Since district personnel are important members of school planning teams, they can review and edit school EOPs for all schools in their district. District Administrators may add to or edit individual school EOPs directly in the Planning Process section. When contributing to a school EOP, it is important to ensure the correct school that has been selected.

1. Select the **School** dropdown menu in the Navigation bar.

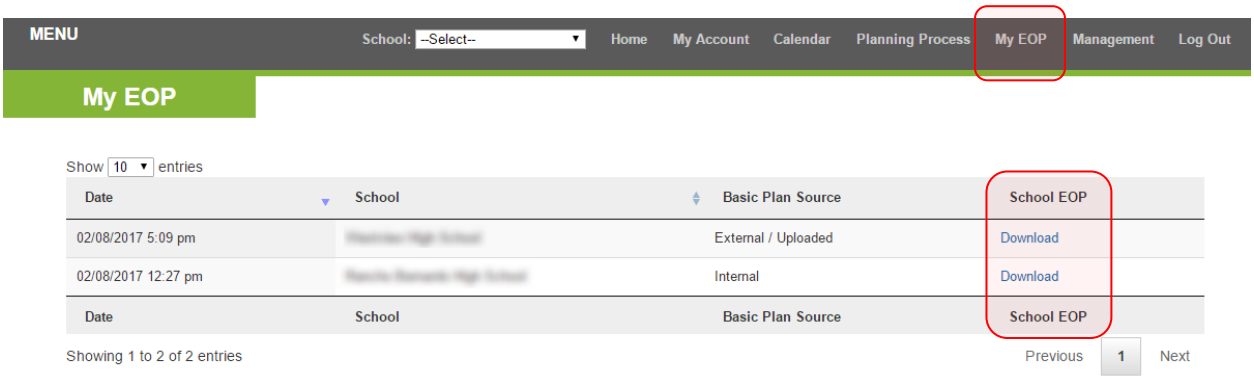


2. A list of schools will appear.
3. Select the appropriate school.

Viewing School EOPs

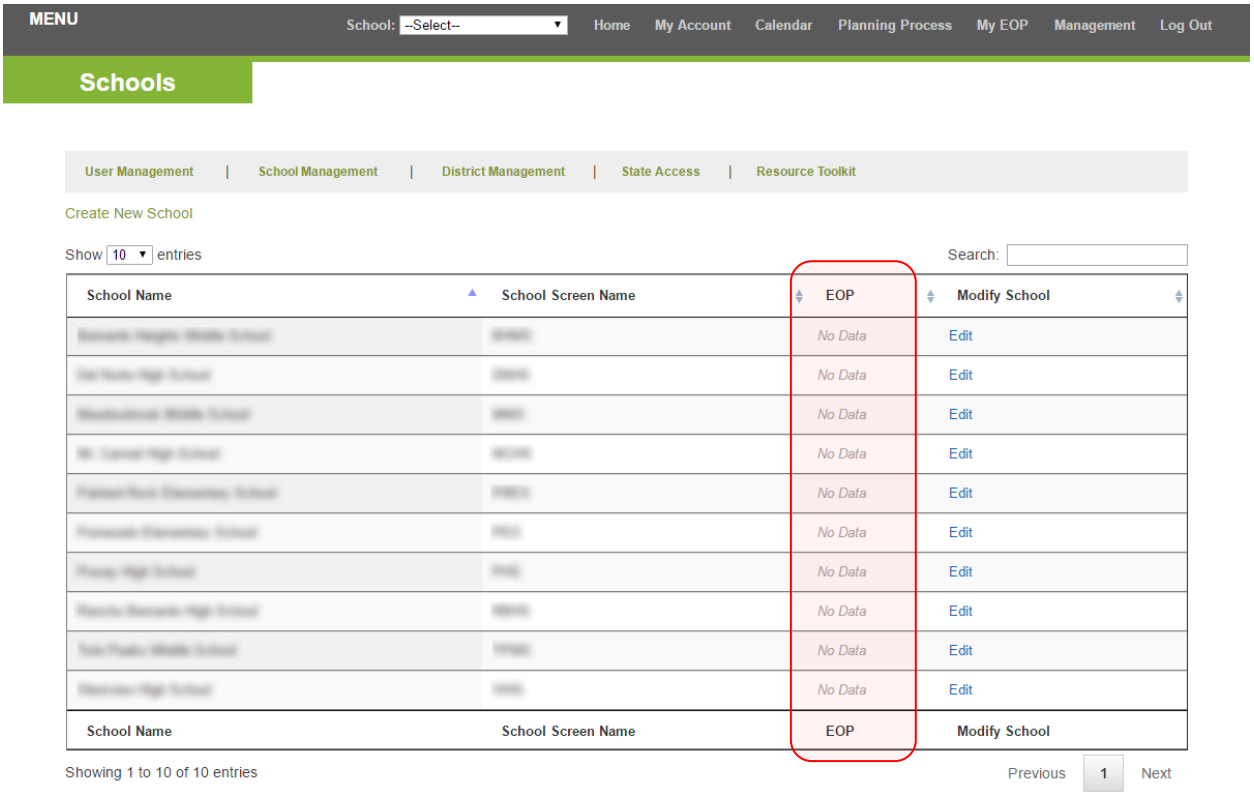
The result of the six-step planning process is the school EOP, which may be accessed two different ways. The My EOP section provides District Administrators with access to the most up-to-date school EOPs in the application for all schools in your district. Only school EOPs that exist will appear on this page. Data must appear in Step 5 for a school EOP to be created in the application, as mentioned in Chapter 5.

1. Select **My EOP** in the Navigation bar.
2. Click the **Download** button for school whose EOP you wish to view.



The Management section also provides District Administrators with access to the most up-to-date school EOPs in the application for all schools in your district. All schools in the district will appear in the School List, and the status of and/or access to their school EOP will also appear in the respective row.

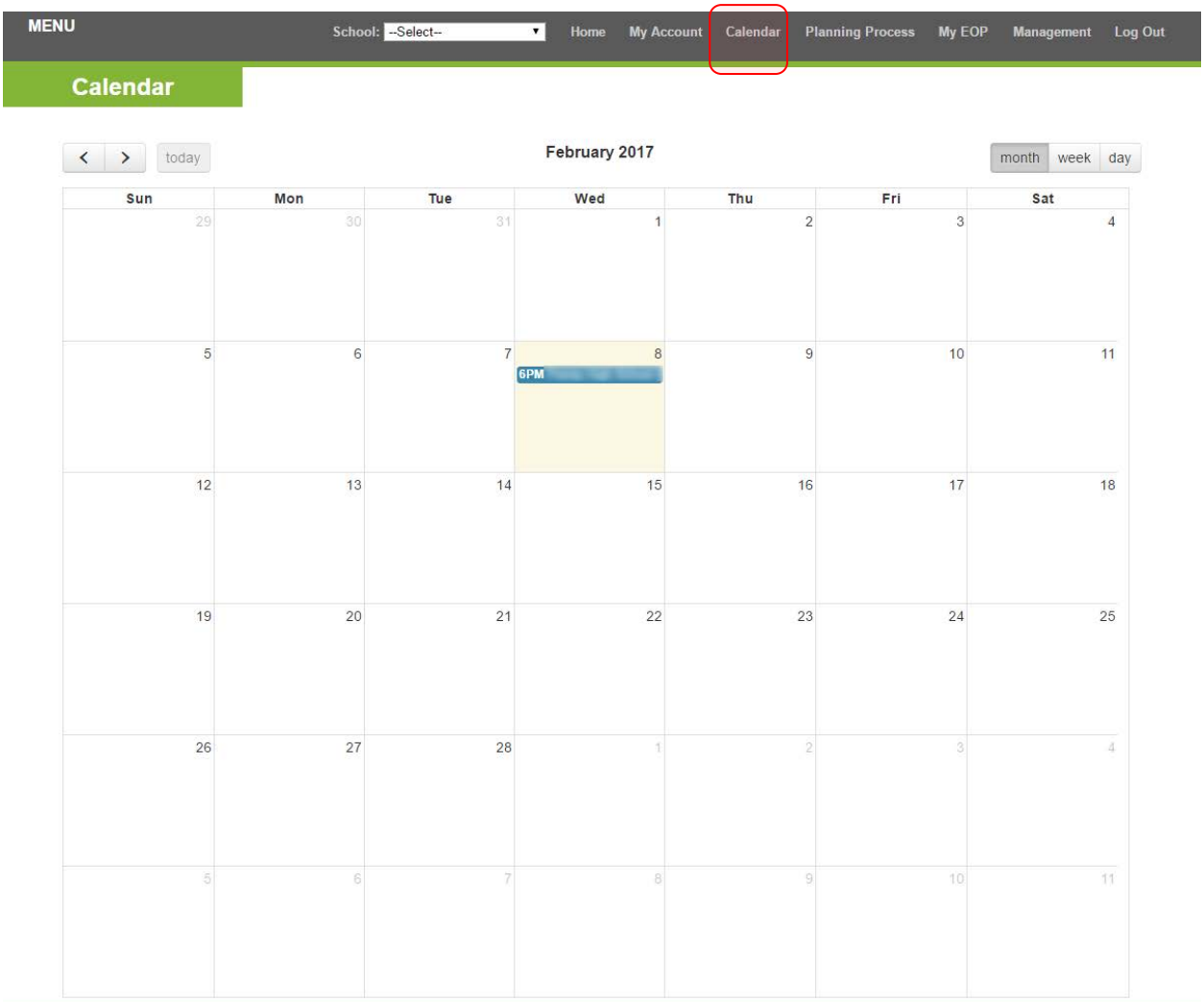
1. Select **Management** in the Navigation bar.
2. Select the **School Management** tab.
3. Click the **View** button in the EOP column for the school whose EOP you wish to view.



If "No Data" appears in the EOP column, then that school has not completed the six-step planning process and does not have a comprehensive school EOP. Data must appear in Step 5 for a school EOP to be exported, as mentioned in Chapter 5.

Calendar

The Calendar section will help your district and school planning teams schedule meetings and create reminders and notifications to support emergency management planning. Events for each school in your district will appear on your calendar, which you will be able to edit and add to, as necessary. For more information on how to create and modify events on the Calendar, please refer to the Calendar section in Chapter 5.



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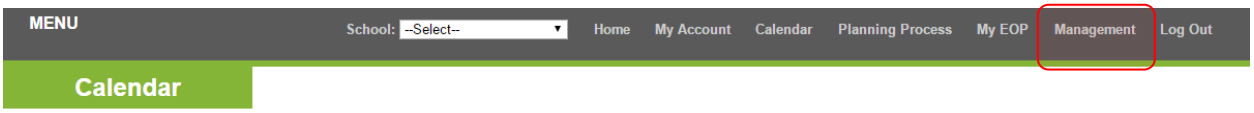
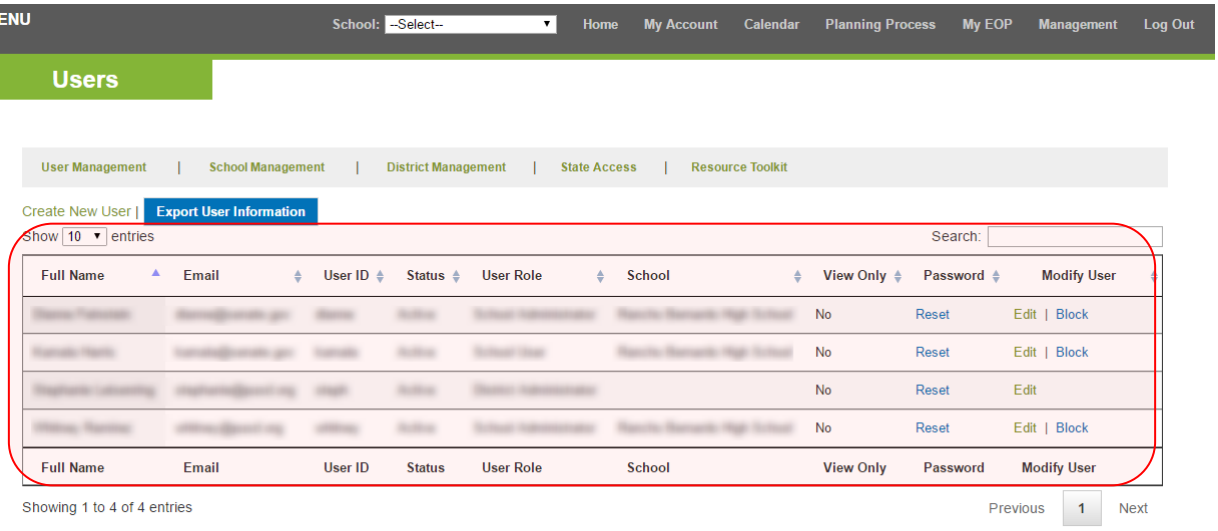
Managing User Accounts

In addition to participating in the planning process, District Administrators serve as the point of contact for district-wide access to EOP ASSIST. As such, the District Administrator can manage all user accounts on each school's planning team (School Users and School Administrators), as well as other district-level user accounts (District Administrators).

1. Select **Management** in the Navigation bar.

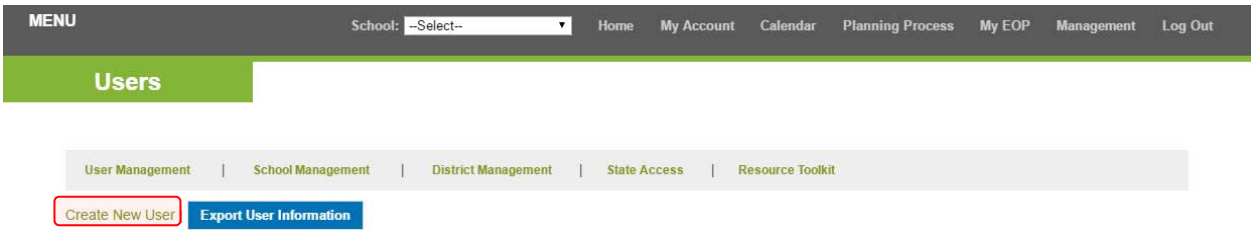


As the District Administrator, you will first see a list of user accounts within your district, which is called the **User List**. This lets you view all of the user accounts that have access to the application within your district. User accounts can be sorted alphabetically by various categories so that you can more easily find a specific user account. You are also able to search through the list to find specific user accounts, as well as create new user accounts and edit or block existing user accounts. Further, this page lets you reset passwords, if needed.

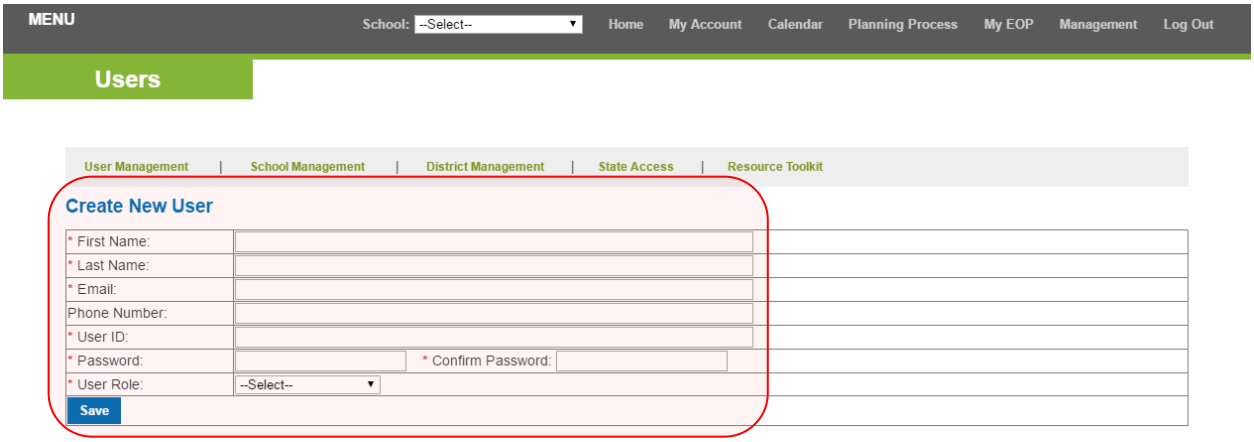


Creating New User Accounts

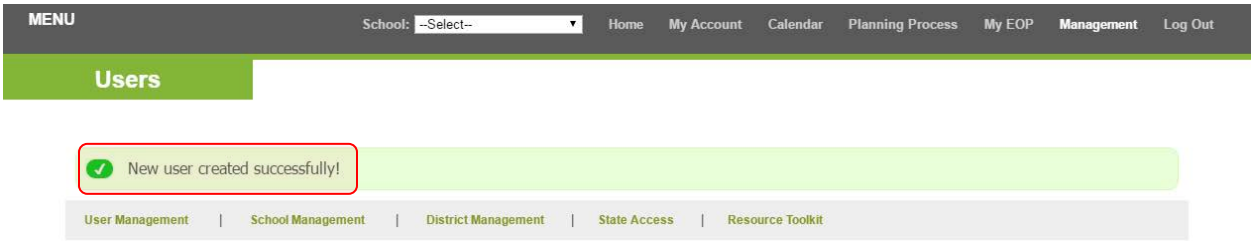
1. Click the **Create New User** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears. User IDs and email addresses must be unique for each user.
   - Select the appropriate user role in the User Role dropdown menu: District Administrator, School Administrator, or School User. For more information on each user role, please refer to Chapter 4.
   - Select the appropriate information for the School dropdown menu, if it appears for the selected User Role.
   - Select the appropriate choice for the View Only dropdown menu, only if School User is selected for the User Role. The View Only feature allows School User accounts to view, but not add or edit, data within the application for their school.
3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The user account information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



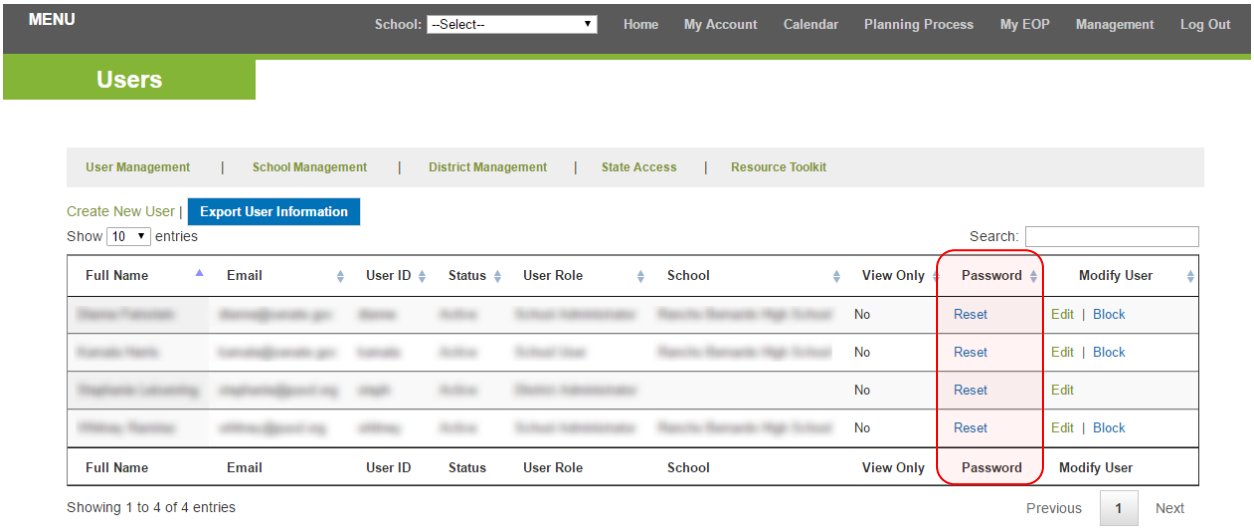
6. Share the newly created User ID and password with the user so that he or she can log in and change his or her account information. When a profile is created, the user is automatically given an "active" status. This means that new user accounts have access to EOP ASSIST through their respective log-in information.

***Please note**: When selecting the User Role for a new user, you will have the option to select District Administrator, School Administrator, or School User. District Administrators have access to all school EOPs within their district, and also can manage user accounts within the district. School Administrators and School Users only have access to their school EOP, but School Administrators may also manage user accounts within their school.*

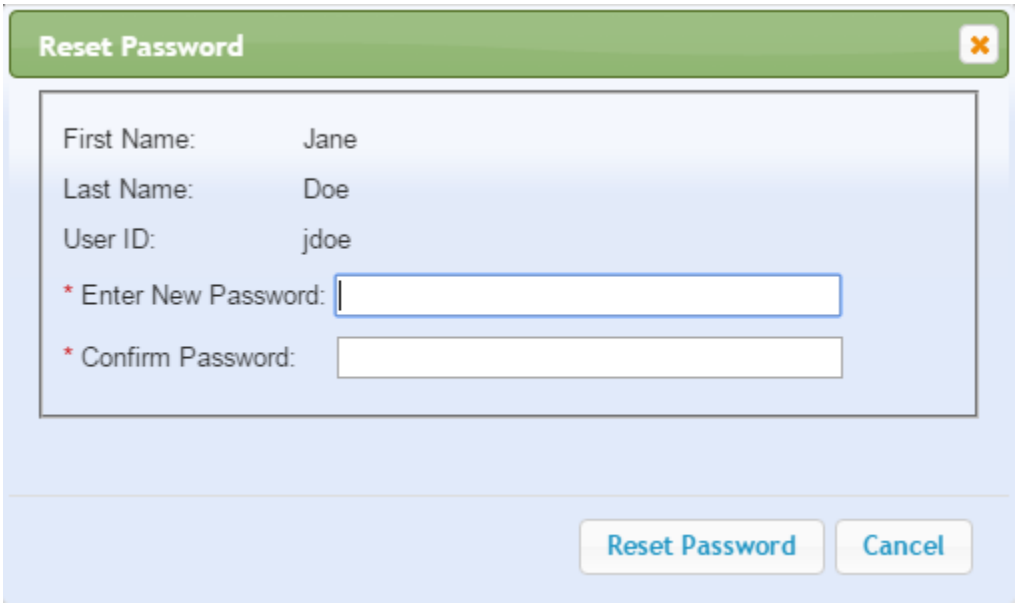
Resetting Passwords

As a District Administrator, you also have permission to reset passwords, in case people forget their passwords. While you have the ability to reset passwords for District Administrator, School Administrator, and School User accounts, you should only be responsible for resetting the passwords of District Administrator accounts. All School Administrators and School Users should contact School Administrators at their school to request their passwords be reset.

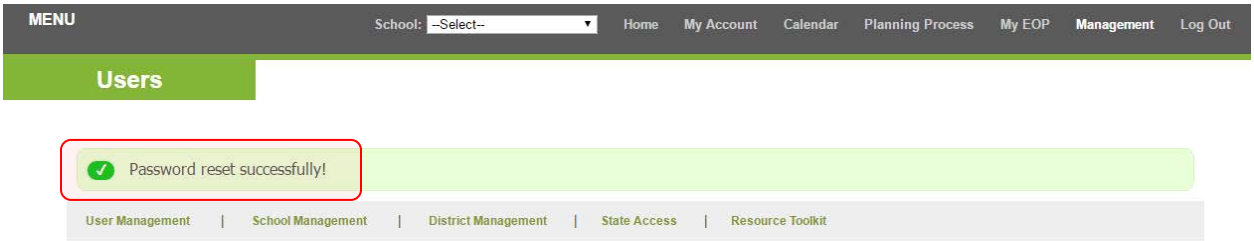
1. Click the **Reset** button in the Password column for the corresponding user.



2. Confirm that the First Name, Last Name, and User ID that appear are correct for the user account whose password you wish to reset.
3. Fill all of the required fields (noted with an asterisk) with a new password in the pop-up that appears.
4. Make a note of the new password so that you can send it to the actual user who will use this password to log in.
5. Click the **Reset Password** button.



6. The new password will save, the screen will return to the User List, and a confirmation message that a password was reset successfully will appear.

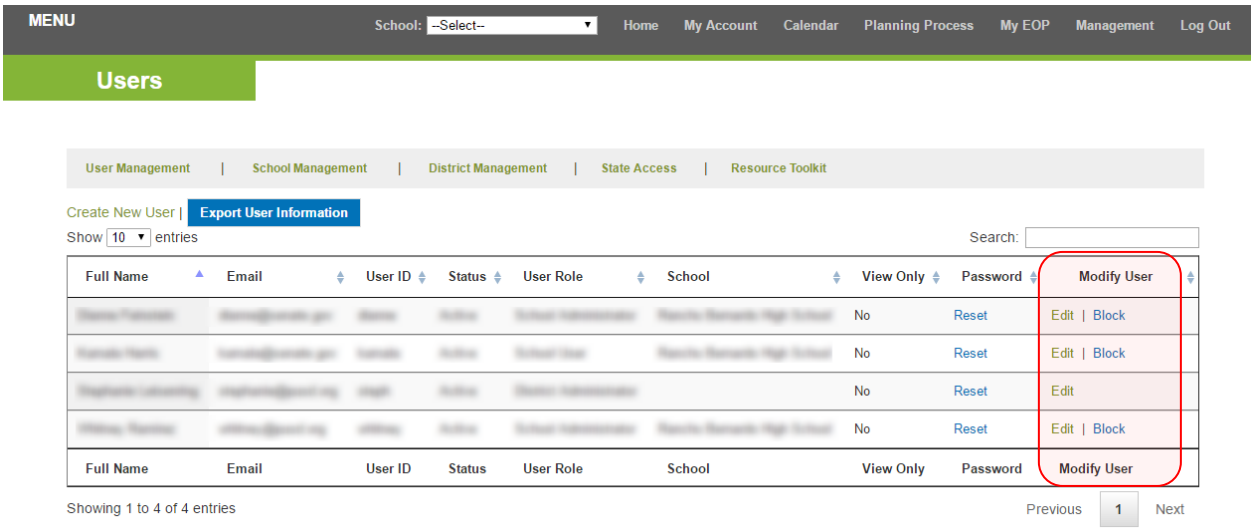


7. Share the new password with the user so that he or she can log in and change his or her password for confidentiality purposes.

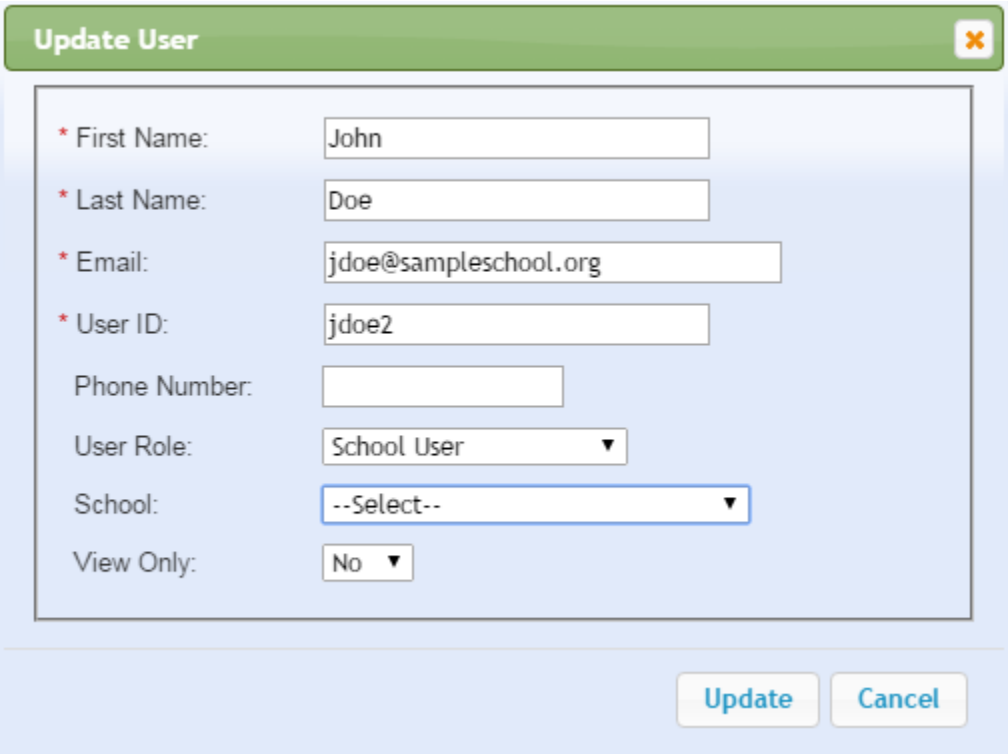
Modifying User Accounts

District Administrators also have permission to modify user accounts.

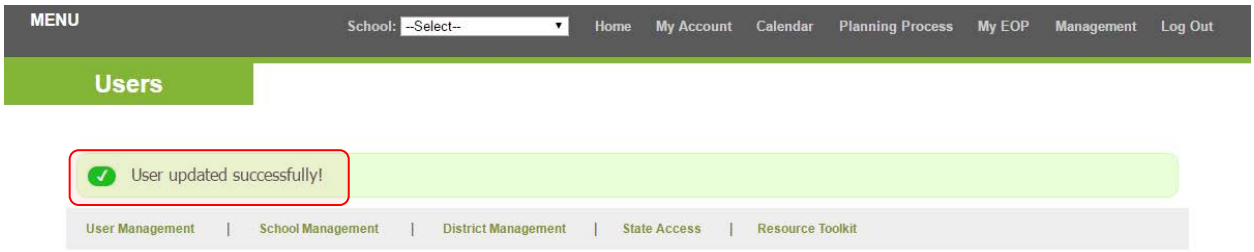
1. Click the **Edit** button in the Modify User column for the user account that you wish to modify.



2. Edit any of the fields that you wish to modify in the pop-up that appears.
3. Click the **Update** button.



4. The user account information will save, the screen will return to the User List, and a confirmation message that a user account was updated successfully will appear.

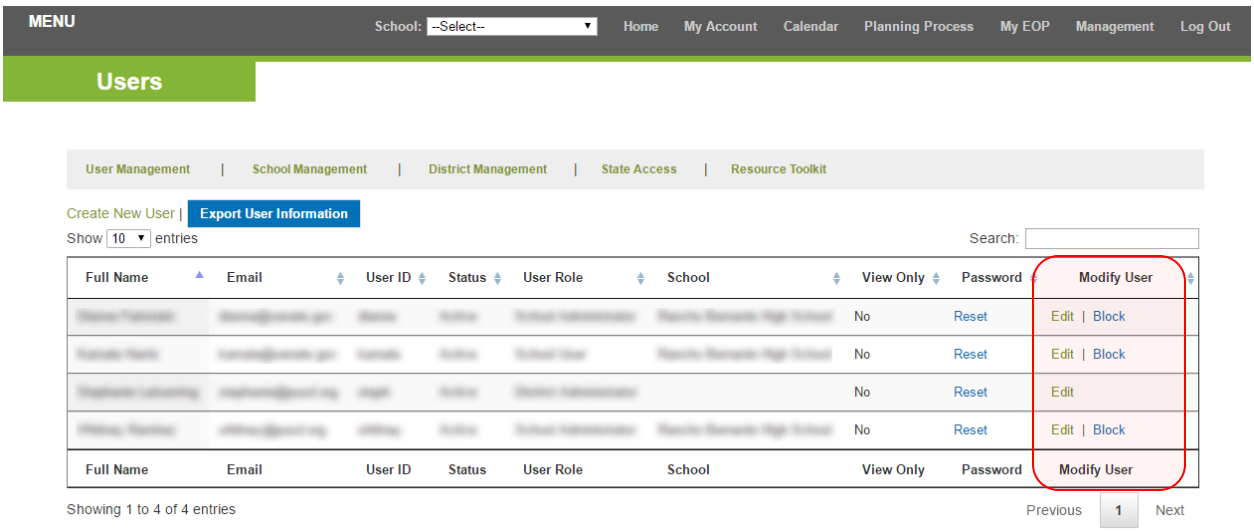


***Please note**: You cannot change your own User Role. If you wish to change such information, please contact another District Administrator.*

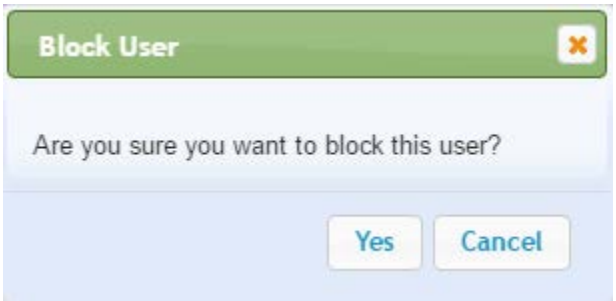
Blocking User Accounts

District Administrators also have permission to block user accounts. This feature prohibits the user from successfully logging in to the application until his or her user account is "unblocked." District Administrators may want to block a user account if a user leaves a school or the district, but do not want to delete their user account permanently.

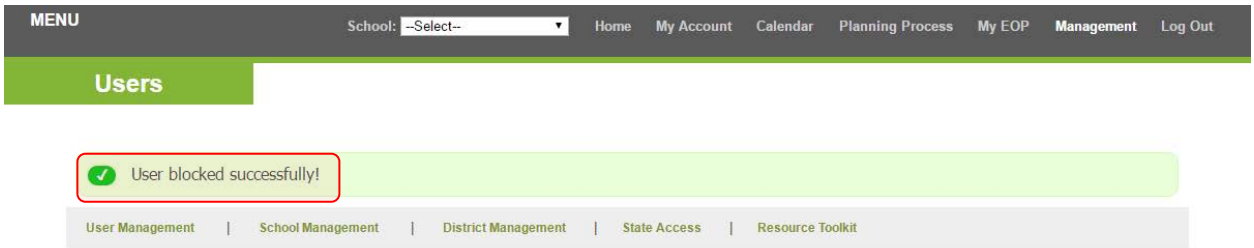
1. Click the **Block** button in the Modify User column for the user account that you wish to block.



2. Click the **Yes** button.



3. The user account information will save, the screen will return to the User List, and a confirmation message that the user account was blocked successfully will appear.



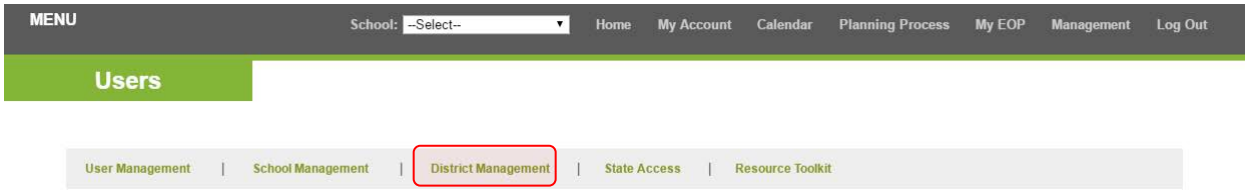
***Please note**: You cannot block your own user account.*

Managing the District Account

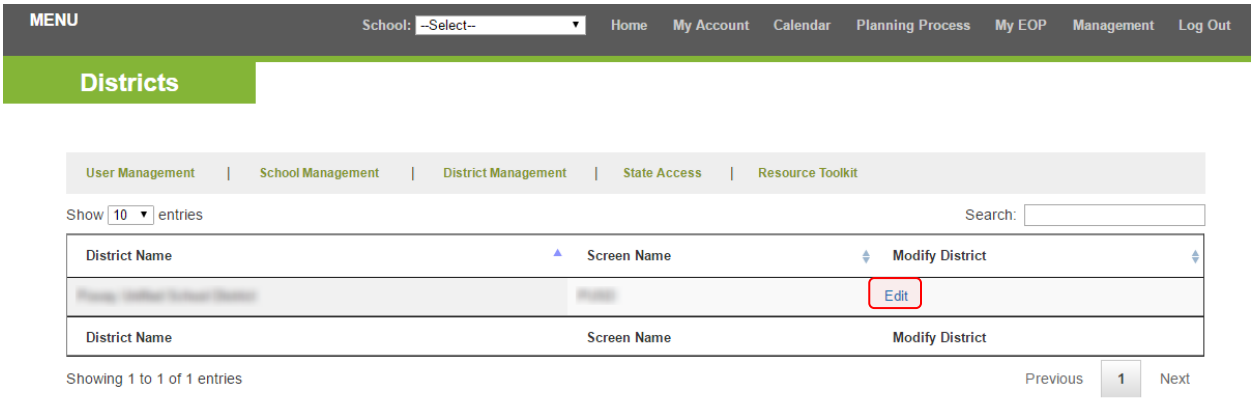
As a District Administrator, you can edit the name of your district within EOP ASSIST. This is primarily in the case of a district name change, as an Administrator will be responsible for entering the district name upon initial installation of EOP ASSIST.

Modifying the District Profile

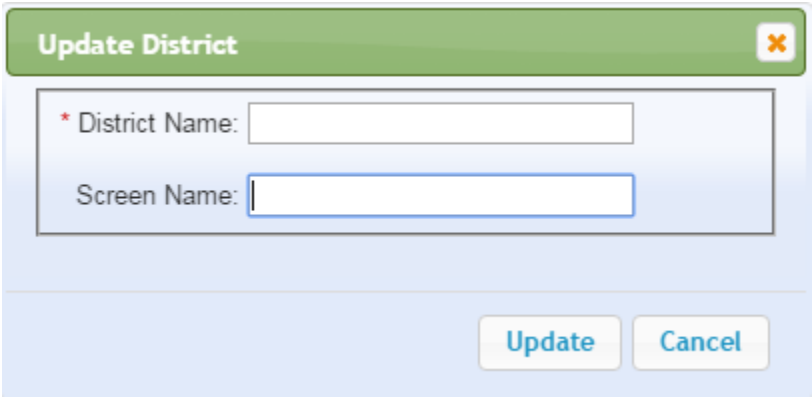
1. Click the **District Management** tab above the User list.



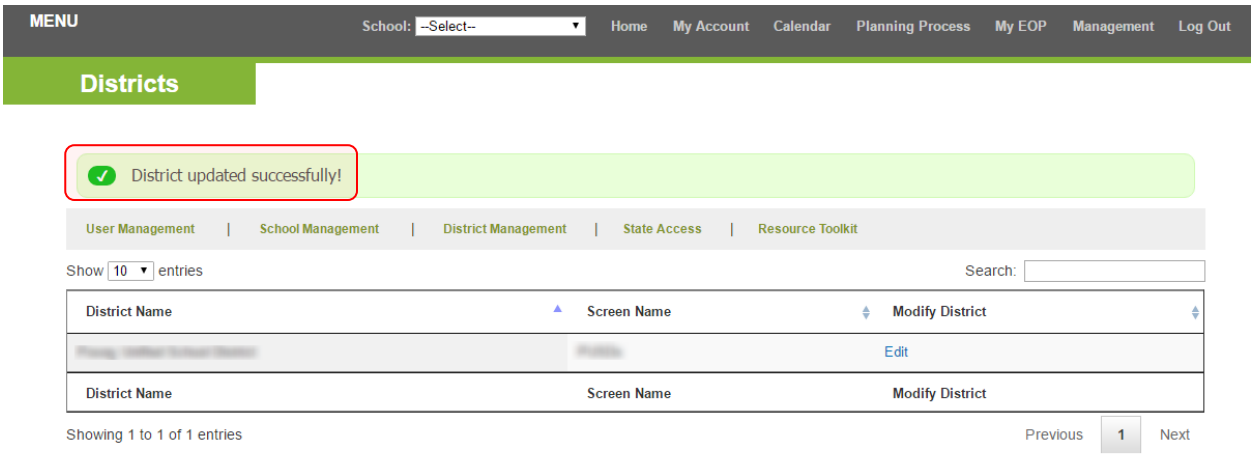
2. Click the **Edit** button in the Modify District column.



3. A pop-up notification will appear, titled "Update District."
   - Edit the District Name or Screen Name, as needed.
   - Click the **Update** button.



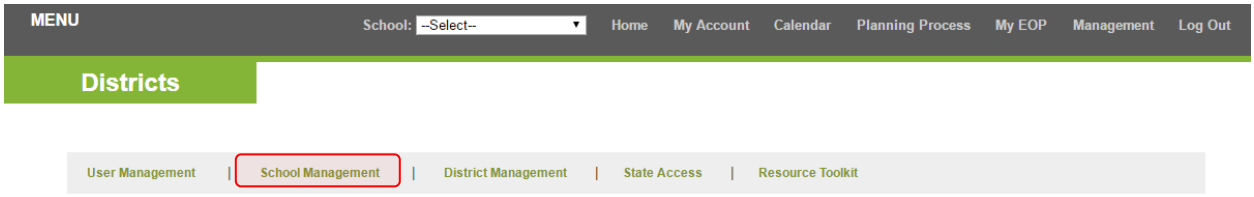
4. The pop-up notification will disappear, the updated data will appear in the list of district information, and a confirmation message indicating that the district was updated successfully will appear.



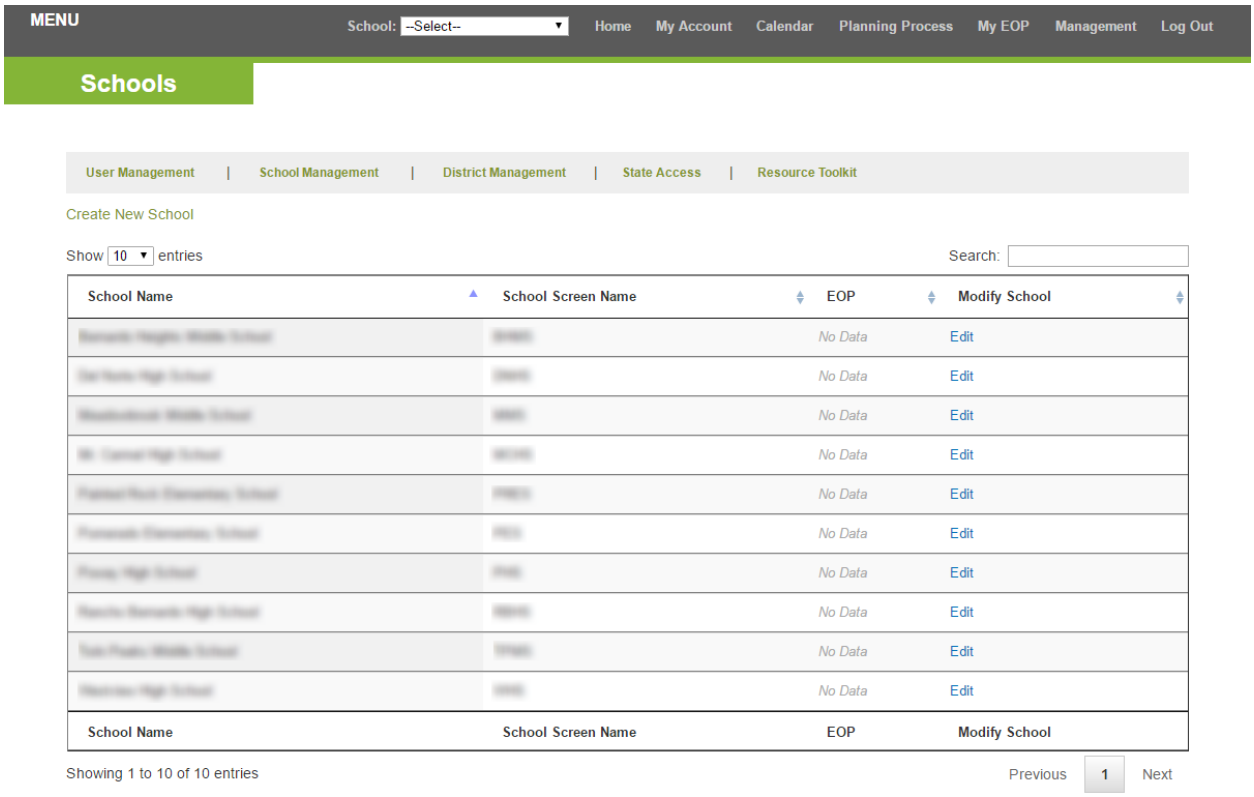
Managing School Profiles

As a District Administrator, you also can manage the school profiles within your district that will use EOP ASSIST. This includes creating school profiles, as well as editing existing school profiles within the application.

1. Select the **School Management** tab.

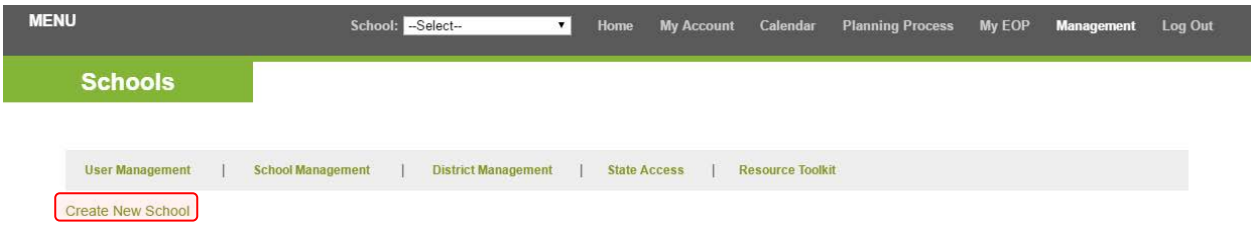


2. A new table will appear in place of the User list that displays all school profiles in your district that have been saved in the application. From this table you may gain access directly to each school EOP in the district. To view a school EOP, select View in the EOP column. You will then be prompted to download the school EOP as a Microsoft Word document. If "No Data" appears in this column, it means that the school has not completed the six-step planning process and has not saved any information about threats or hazards within the application.

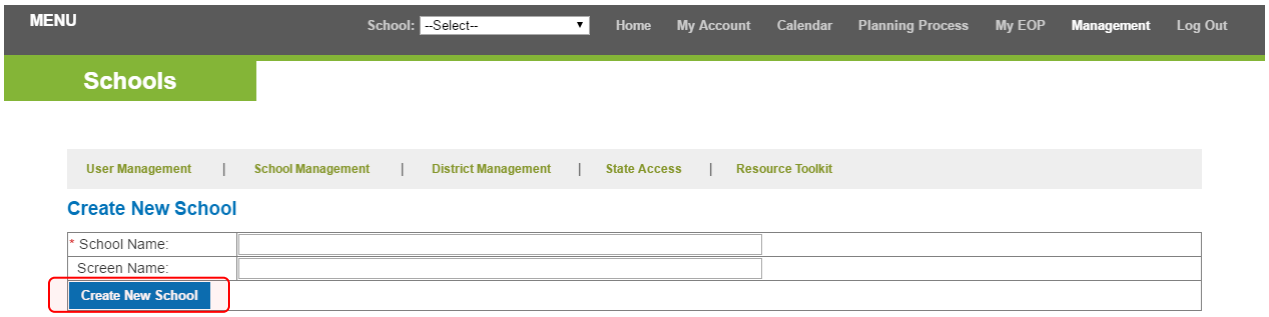


Creating New School Profiles

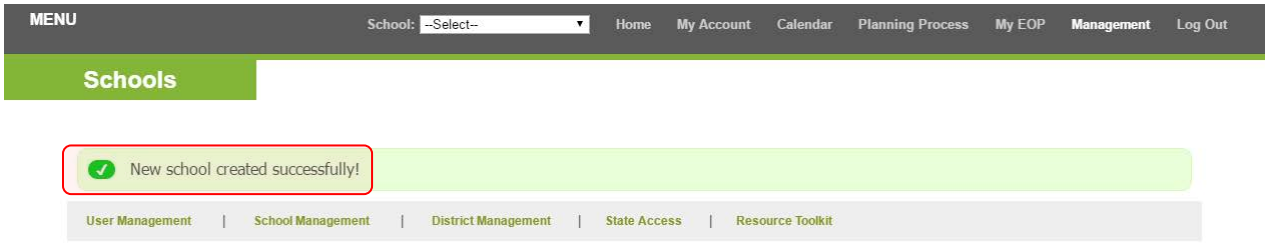
1. Click the **Create New School** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears.
   - Type the full name of the school in the School Name field.
   - Type the acronym or abbreviation of the school in the Screen Name field.
   - Click the **Create New School** button.

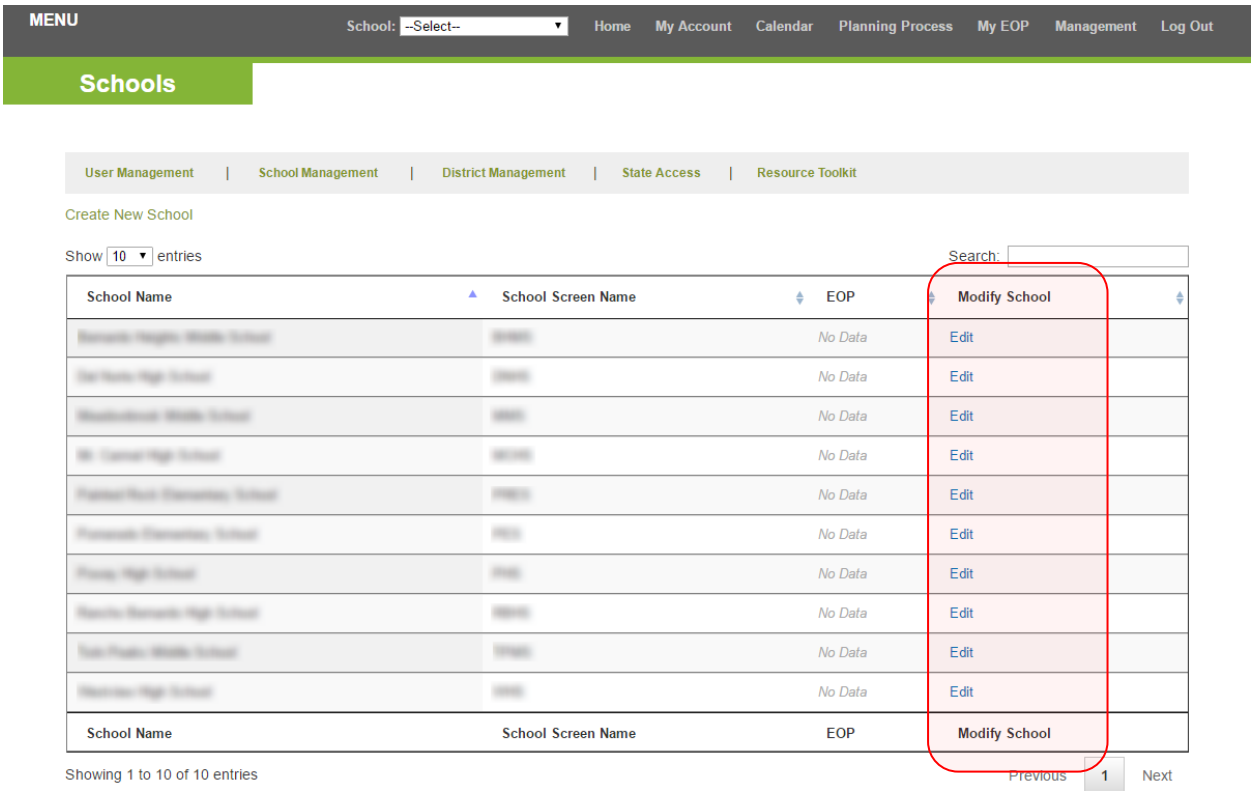


3. The school name and other information will save, the screen will return to the School List, and a confirmation message indicating that a new school profile was created successfully will appear.

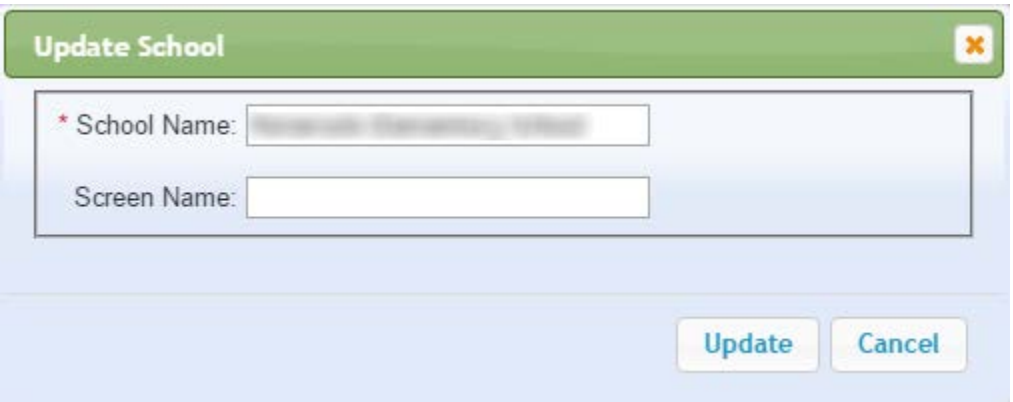


Modifying School Profiles

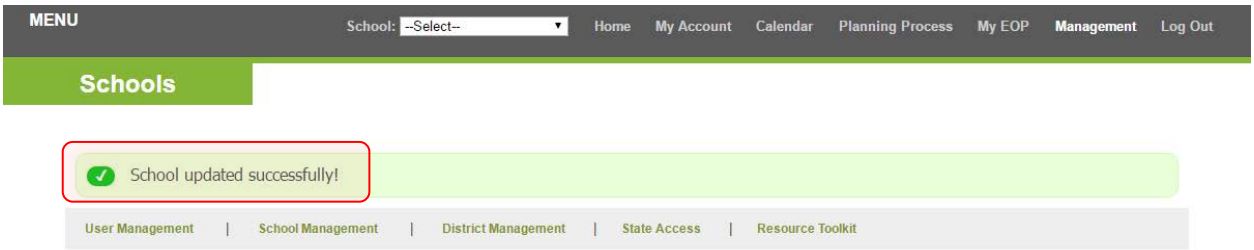
1. Click the **Edit** button for the corresponding school profile in the Modify School column that you wish to modify.



2. Edit any of the fields that you wish to modify in the pop-up that appears.
3. Click the **Update** button.



4. The school profile information will save, the screen will return to the School List, and a confirmation message that a school profile was updated successfully will appear.



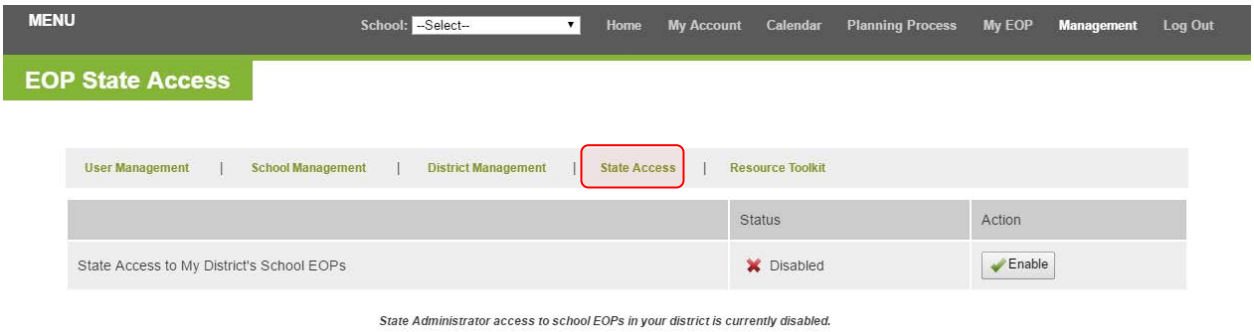
***Please note**: If you wish to delete a school profile, in the case that a school has closed, please contact your Super Administrator. The Super Administrator is the only user role to have this management functionality.*

Managing State Access to School EOPs

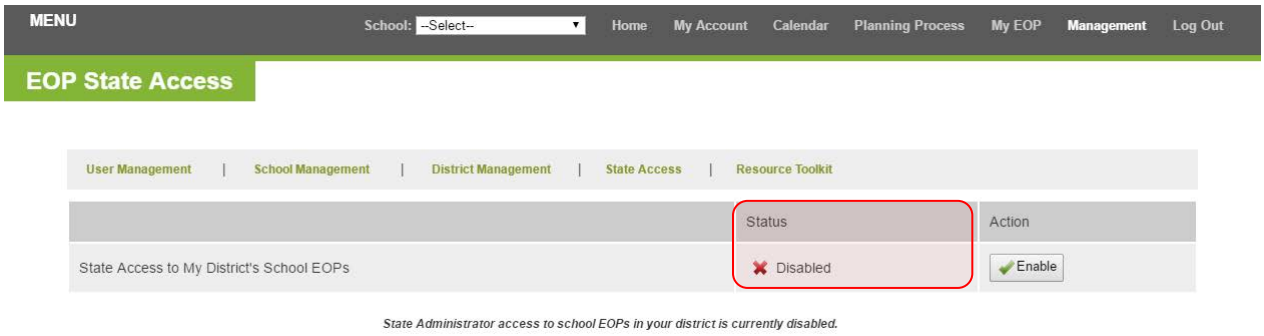
Districts may sometimes want to share school EOPs with a state agency, either for review or certification reasons. This may be done directly through EOP ASSIST **only in the case of state-level hosting**. In order for State Administrators to gain access to a school EOP through the application, both representatives at the local and state levels must enable this feature. In order for State Administrators to view school EOPs from a school affiliated with a district, a State Administrator, School Administrator from that school, and District Administrator from that district must all enable the State Access feature.

Enabling State Access

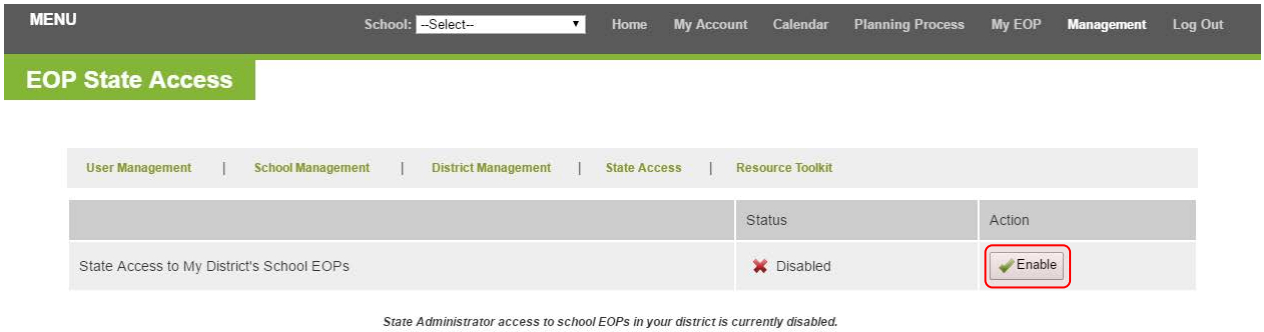
1. Select the **State Access** tab.



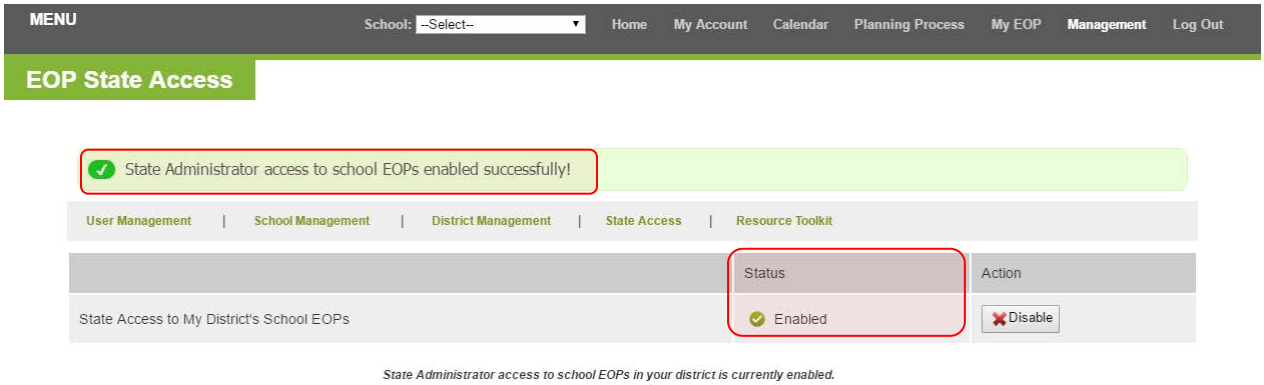
2. You will see a table that displays the status of state access to school EOPs in your district, as granted by District Administrators.



3. Click on the **Enable** button in the Action column.



4. The status will change and a message that state access to school EOPs was enabled successfully will appear.



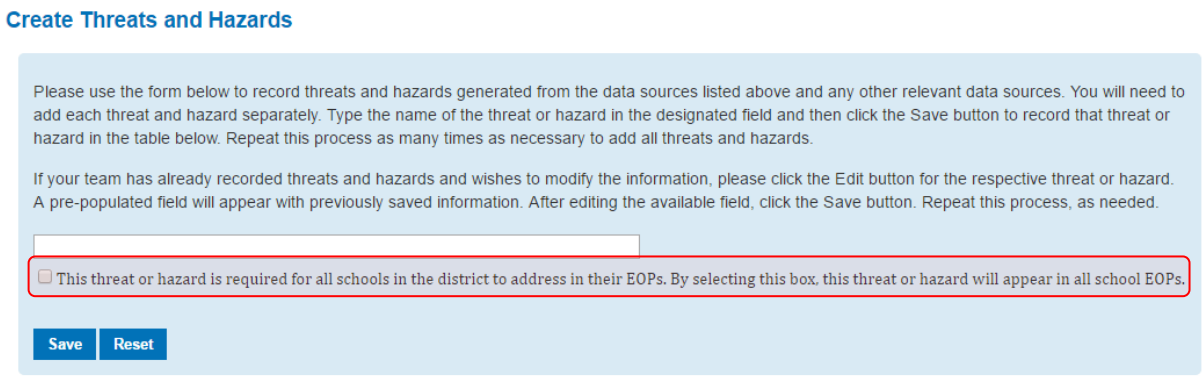
***Please note**: This feature is only available in state-level hosting. Enabling the State Access feature does not guarantee that State Administrators will have access to all school EOPs. If you are affiliated with a school that does not want the state to have access to a school EOP, or a state that does not want to be able to view school EOPs, then they can both block State Administrators from your school EOP.*

Creating District-Wide Threats, Hazards, Functions, Goals, and/or Objectives

State Administrators are able to create threats, hazards, and functions that all school planning teams should address in their school EOPs, as well as goals and objectives, based on district policies or local laws. District Administrators are not required to add district-wide data to the application, and schools are not required to include district-wide EOP data in their school EOP.

Creating District-Wide Threats and Hazards

1. Navigate to Step 2: Develop a Comprehensive List of Possible Threats and Hazards Using a Variety of Data Sources.
2. Type the district-wide threat or hazard into the field and select the checkbox.
3. Click the **Save** button.

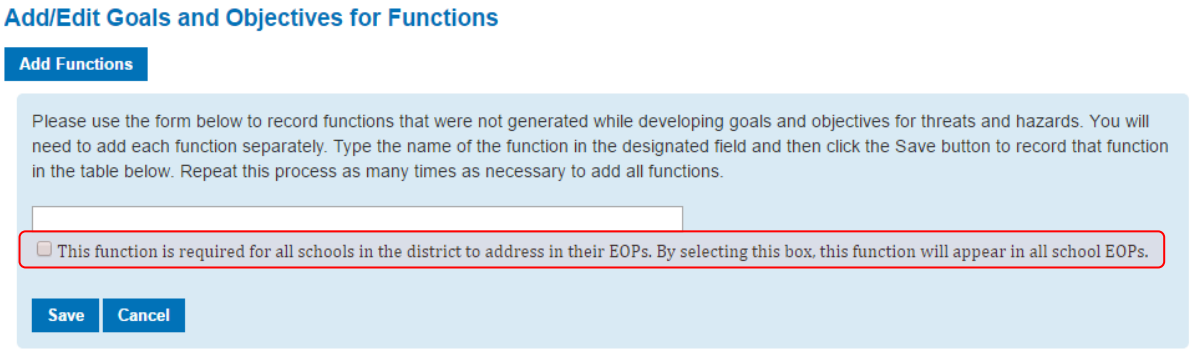


Creating District-Wide Goals and Objectives for District-Wide Threats and Hazards

1. Navigate to Step 3: Develop Goals and Objectives for Threats and Hazards.
2. Click the **Add** button in the Goals and Objectives column for the threat or hazard that is required by "District."
3. Develop goals and objectives.
4. Click the **Save** button.

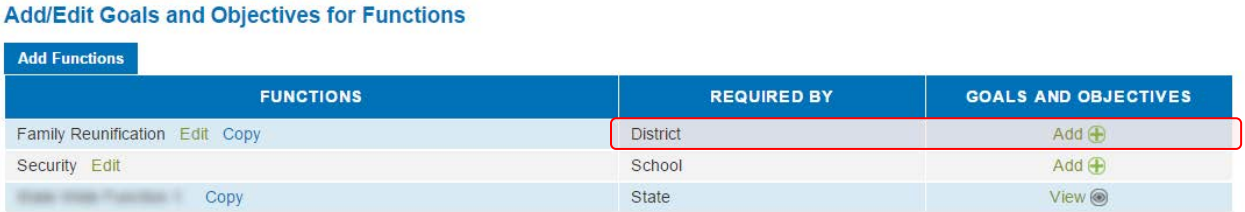
Creating District-Wide Functions

1. Navigate to Step 3: Develop Goals and Objectives for Functions.
2. Click the **Add Functions** button.
3. Type the district-wide function into the field and select the checkbox.
4. Click the **Save** button.



Creating District-Wide Goals and Objectives for District-Wide Functions

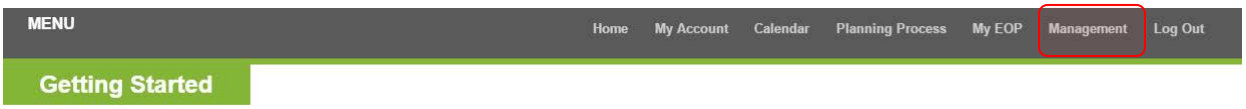
1. Navigate to Step 3: Develop Goals and Objectives for Functions.
2. Click the **Add** button in the Goals and Objectives column for the function that is required by "District."
3. Develop goals and objectives.
4. Click the **Save** button.



School Administrator

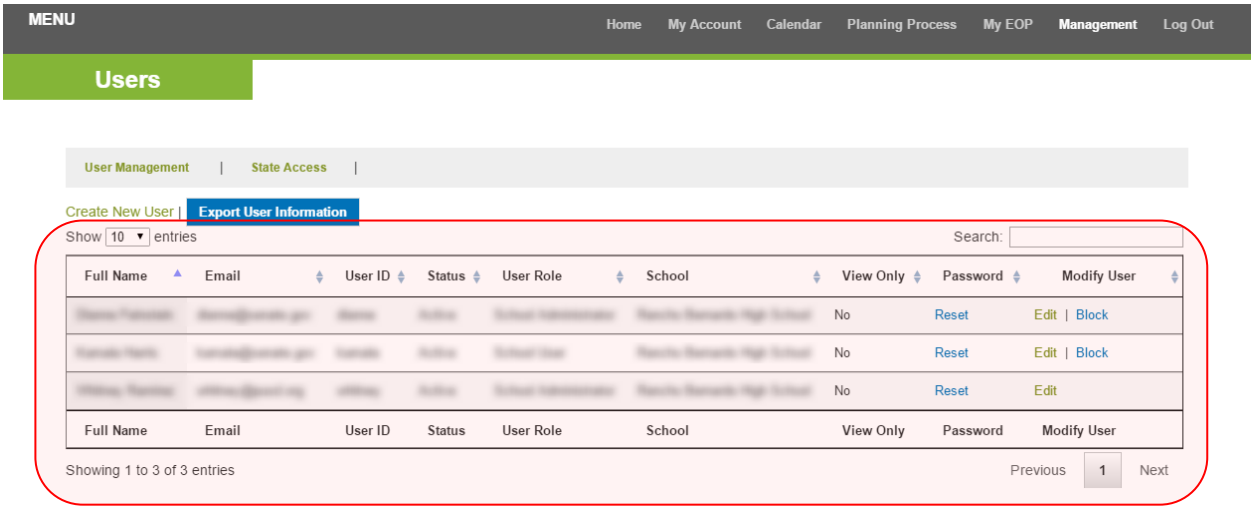
School Administrators are a part of the planning team at their school and, therefore, can contribute, view, and edit information for their school EOP within EOP ASSIST. In this regard, their role in the planning process is much like that of a School User. In addition to participating in the planning process, though, the School Administrator also manages all user accounts on his or her school's planning team. Please note that each school should have, at a minimum, three School Administrators.

1. Select **Management** in the Navigation bar.



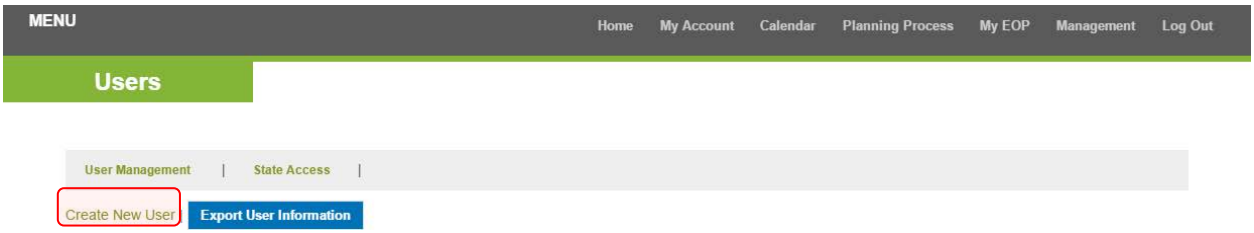
Managing User Accounts

As a School Administrator, you will first see a list of user accounts within your institution's jurisdiction, which is called the User list. This lets you view all of the user accounts that have access to your school EOP through the application. User accounts can be sorted alphabetically by various categories so that you can more easily find a specific user account. You are also able to search through the list to find specific user accounts, as well as create new user accounts and edit or block existing user accounts. Further, this page lets you reset passwords, if needed.

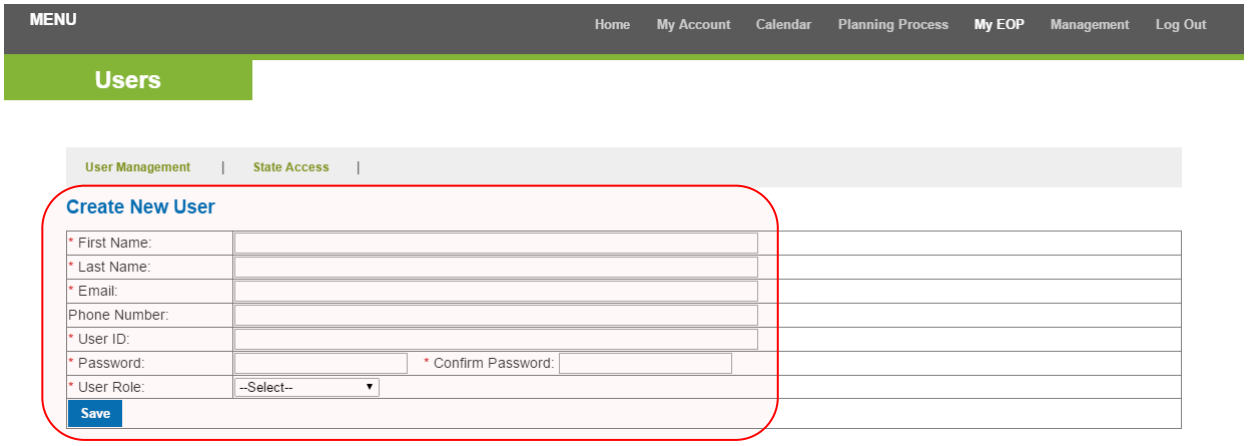


Creating New User Accounts

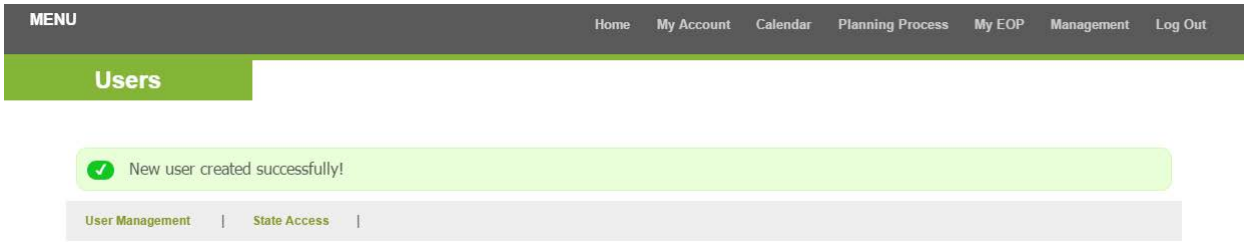
1. Click the **Create New User** button.



2. Fill all of the required fields (noted with an asterisk) in the form that appears. User IDs and email addresses must be unique for each user.
    - Select the appropriate user role in the User Role dropdown menu: School Administrator or School User. For more information on each user role, please refer to Chapter 4.
    - Select the appropriate choice for the View Only dropdown menu, only if School User is selected for the User Role. The View Only feature allows School User accounts to view, but not add or edit, data within the application for their school.
3. Make a note of the User ID and Password information so that you can send it to the actual user who will use these log-in credentials.
4. Click the **Save** button.



5. The user account information will save, the screen will return to the User List, and a confirmation message that a new user account was created successfully will appear.



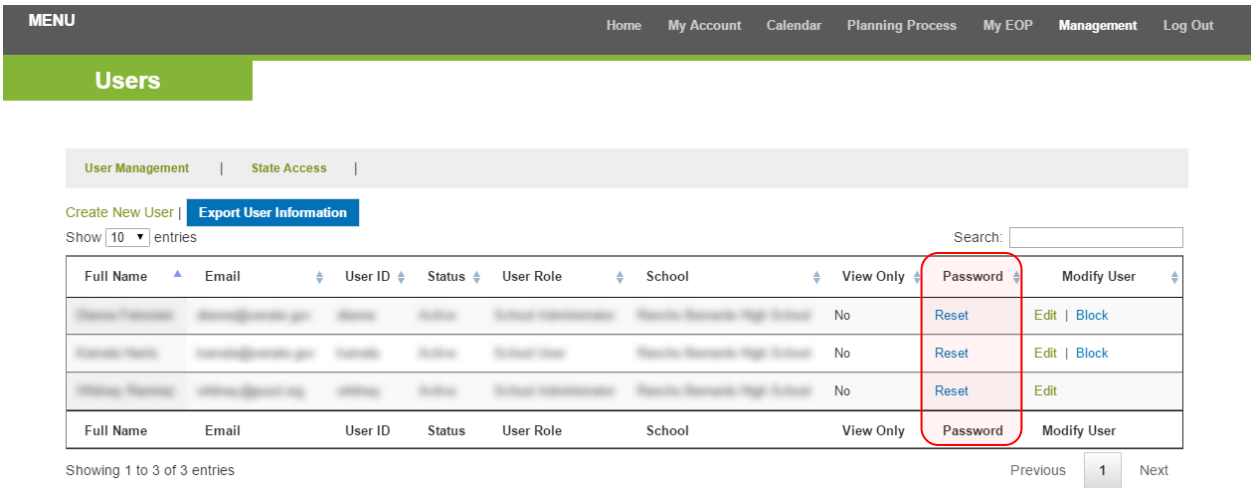
6. Share the newly created User ID and password with the user so that he or she can log in and change his or her account information.

***Please note**: School Administrators can only create a new user account for School Administrators and School Users affiliated with their school.*

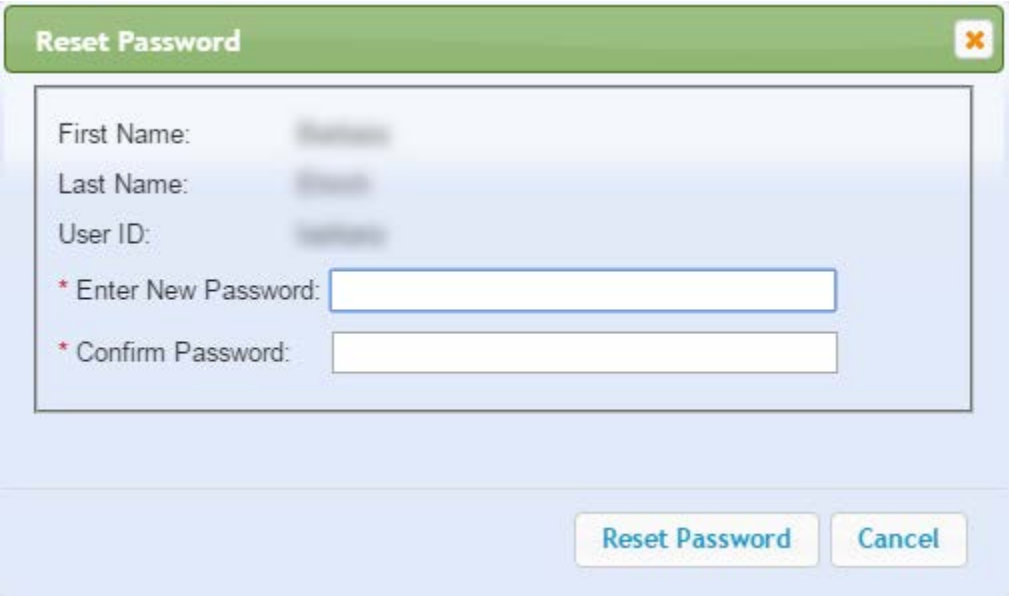
Resetting Passwords

As a School Administrator, you also have permission to reset passwords, in case people forget their passwords.

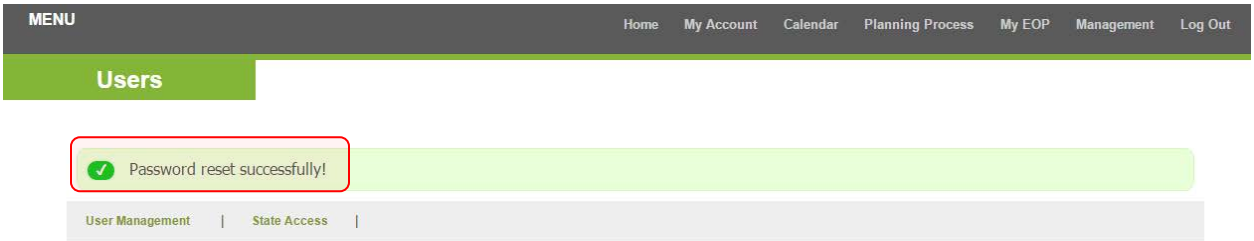
1. Click the **Reset** button in the Password column for the corresponding user.



2. Confirm that the First Name, Last Name, and User ID that appear are correct for the user account whose password you wish to reset.
3. Fill all of the required fields (noted with an asterisk) with a new password in the pop-up that appears.
4. Make a note of the new password so that you can send it to the actual user who will use this password to log in.
5. Click the **Reset Password** button.



6. The new password will save, the screen will return to the User List, and a confirmation message that a password was reset successfully will appear.



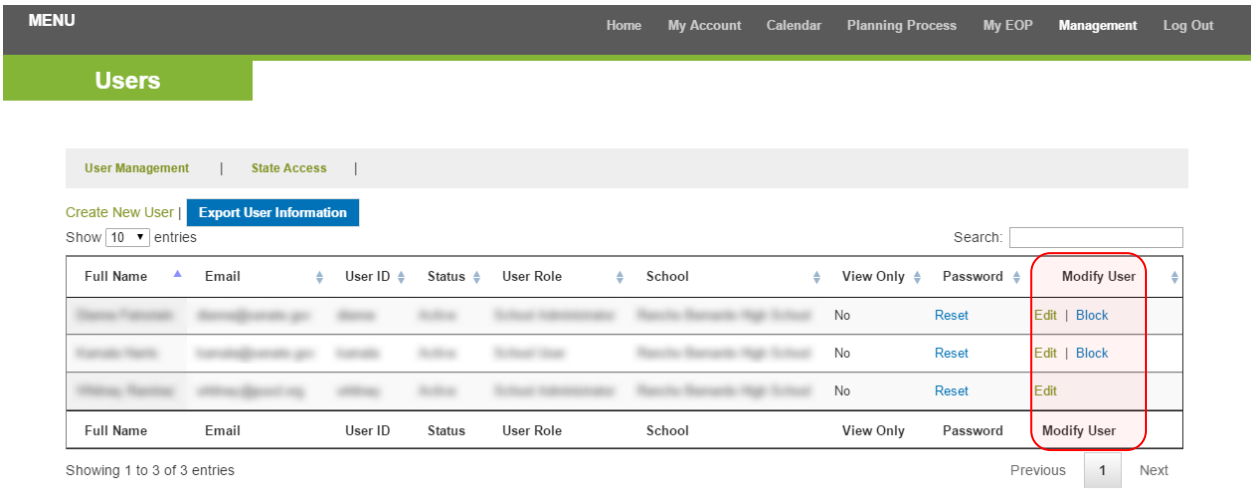
7. Share the new password with the user so that he or she can log in and change his or her password for confidentiality purposes.

***Please note**: School Administrators can only reset passwords for School Administrator and School User accounts affiliated with their school.*

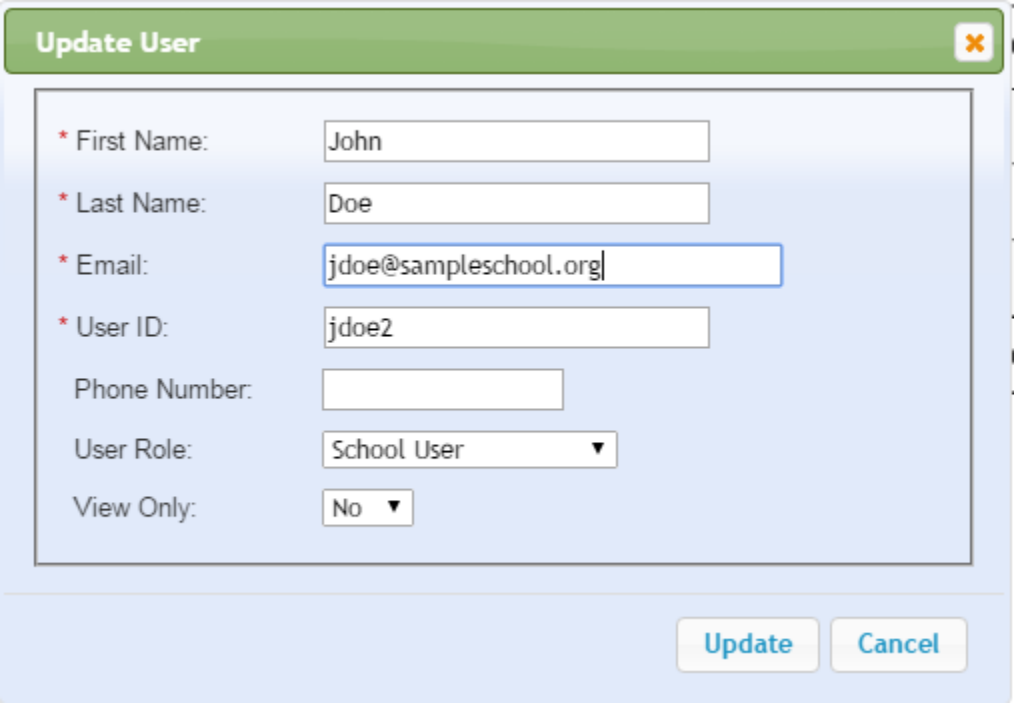
Modifying User Accounts

As a School Administrator, you also can modify user accounts.

1. Click the Edit button in the Modify User column for the user account you wish to modify.



2. A pop-up notification will appear, titled "Update User." Edit the data, as needed, and click the Update button. When editing a School User, you can enable View Only permissions, which means the School User will only be able to view (and not add or edit) data within the Planning Process and Calendar sections. The fields will disappear, and the updated data will appear in the User list.



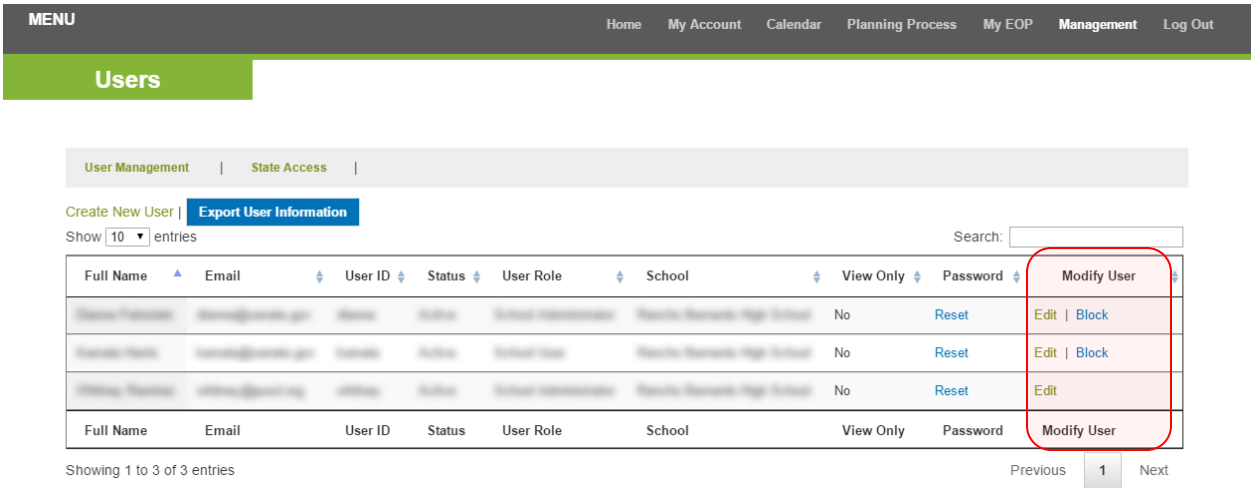
School Administrators have permissions to update the following information for user accounts at their school: name, email address, phone number, User ID, User Role, and View Only status. If you wish to block a user, simply click the Block button in the Modify User column. Similarly, if you would like to activate a user that is currently blocked, click the Activate button in the Modify User column.

***Please note**: School Administrators cannot change their own User Role. If you wish to change such information, please contact your District Administrator or another School Administrator. Both District Administrators and School Administrators have permissions to edit such data.*

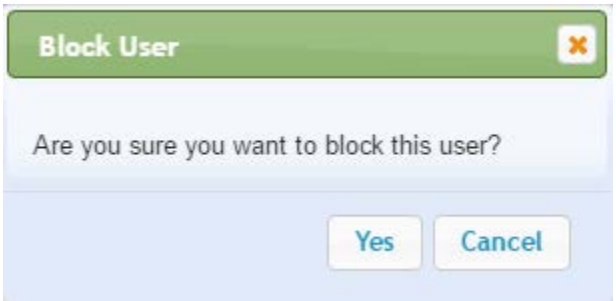
Blocking User Accounts

School Administrators also have permission to block user accounts. This feature prohibits the user from successfully logging in to the application until their user account is "unblocked." School Administrators may want to block a user account if a user leaves the school, but do not want to delete their user account permanently.

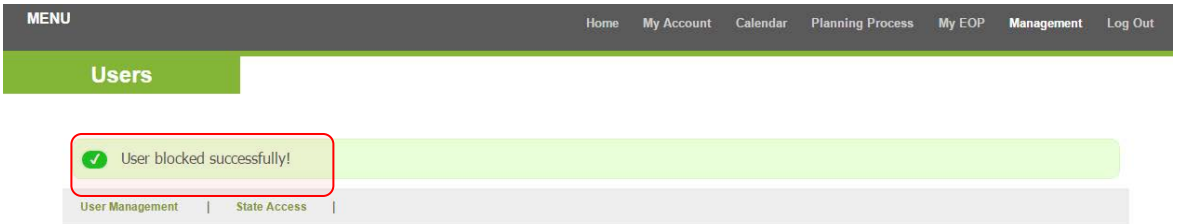
1. Click the **Block** button in the Modify User column for the user account that you wish to block.



2. Click the **Yes** button.



3. The user account information will save, the screen will return to the User List, and a confirmation message that the user account was blocked successfully will appear.



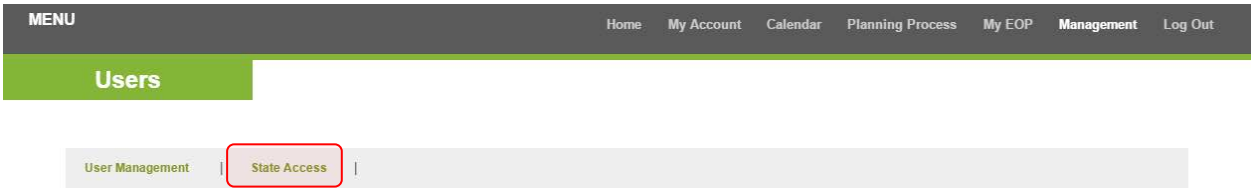
***Please note**: You cannot block your own user account.*

Managing State Access to School EOPs

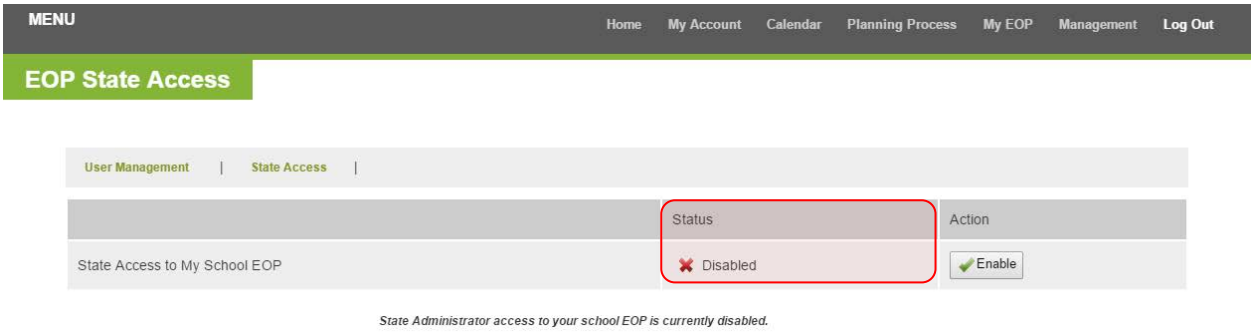
Schools may sometimes want to share school EOPs with a state agency, either for review or certification reasons. This may be done directly through EOP ASSIST **only in the case of state-level hosting**. In order for State Administrators to gain access to a school EOP through the application, both representatives at the local and state levels must enable this feature. In order for State Administrators to view school EOPs from an independent school, both a School Administrator from that school and a State Administrator must enable the State Access feature. In order for State Administrators to view school EOPs from a school affiliated with a district, a State Administrator, School Administrator from that school, and District Administrator from that district must all enable the State Access feature.

Enabling State Access

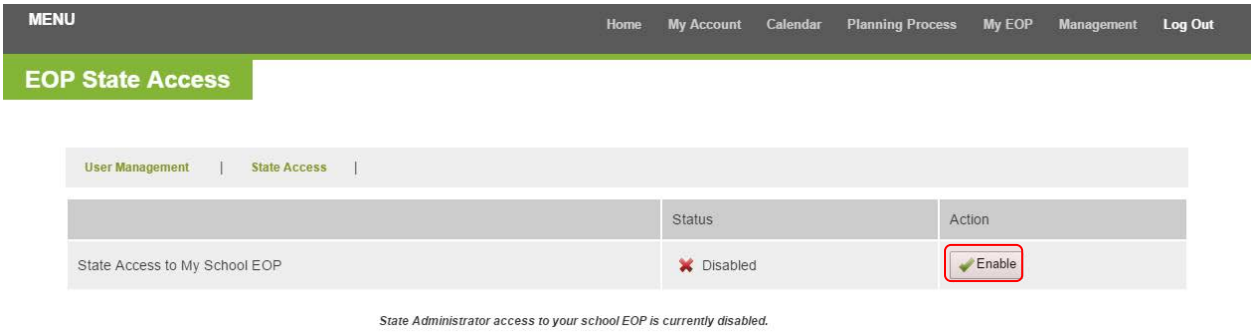
1. Select the **State Access** tab.



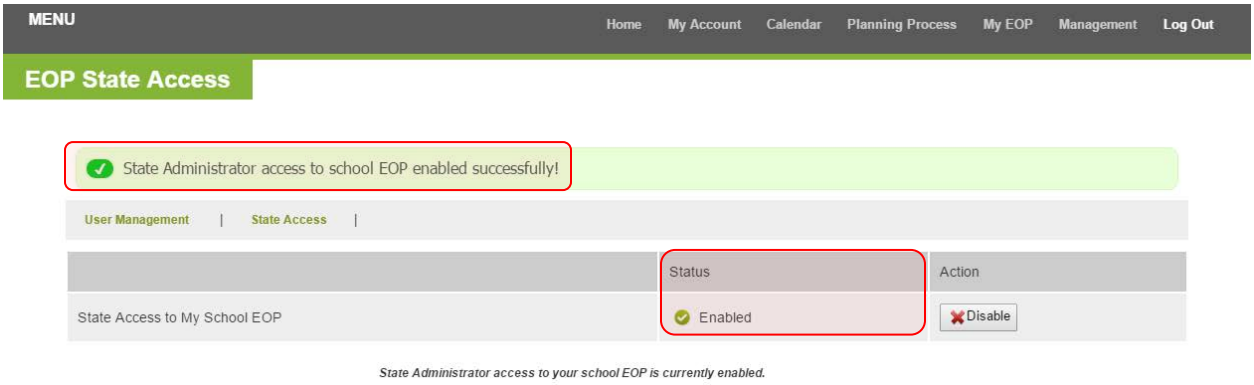
2. You will see a table that displays the status of state access to school EOPs, as granted by School Administrators.



3. Click on the **Enable** button in the Action column.



4. The status will change and a message that state access to school EOPs was enabled successfully will appear.

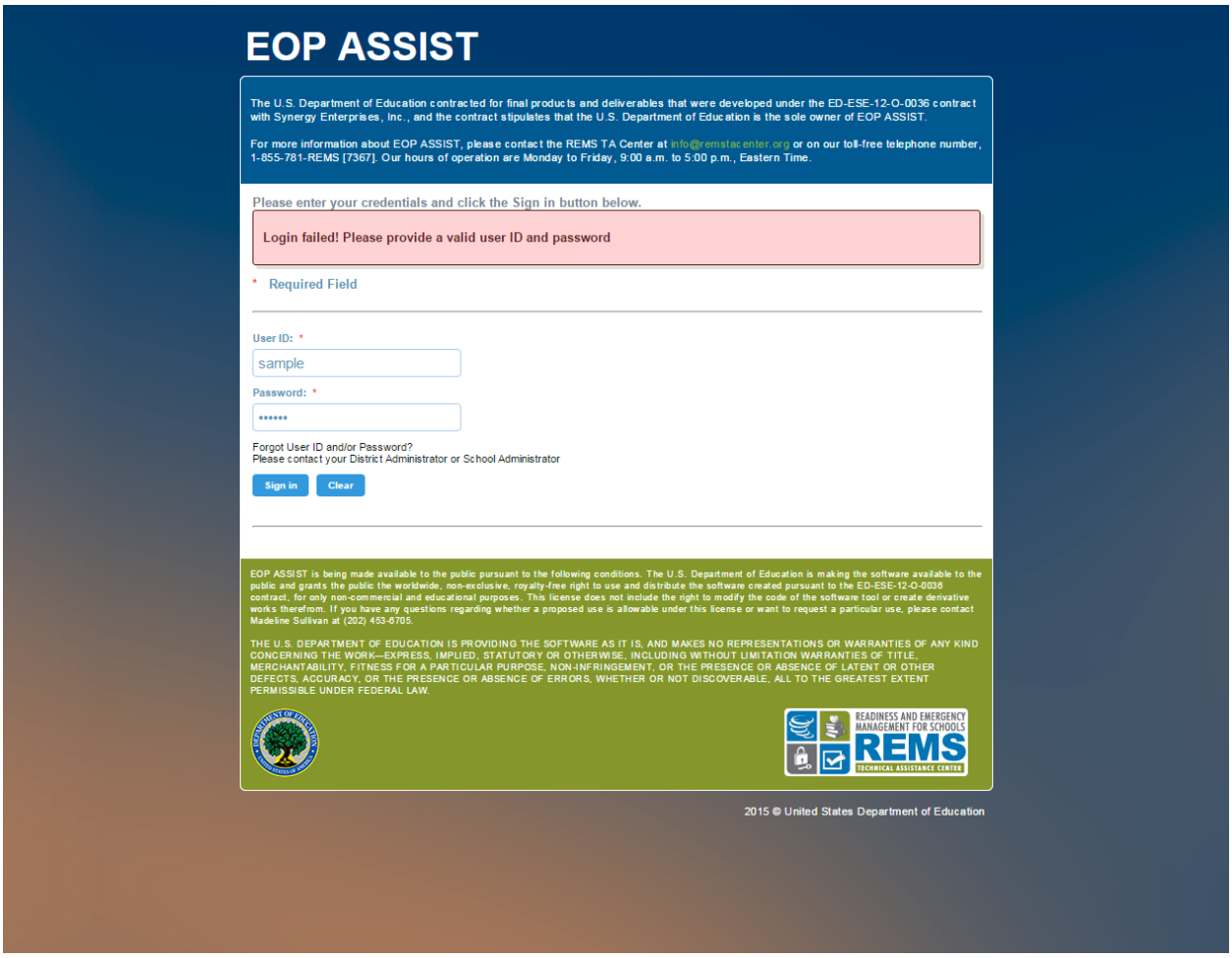


Please note: *This feature is only available in state-level hosting. Enabling the State Access feature does not guarantee that State Administrators will have access to your school EOPs. If you are affiliated with a district that does not want the state to have access to a school EOP, or a state that does not want to be able to view school EOPs, then they can both block State Administrators from viewing your school EOP.*

Appendix A. Troubleshooting

Cannot Log In

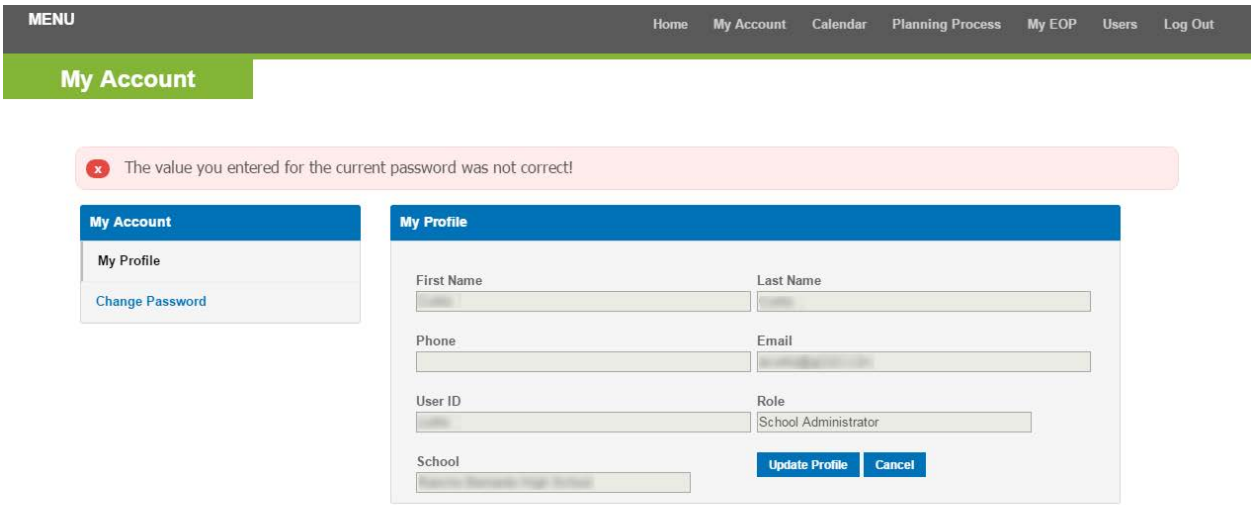
Scenario: On the login page, you enter your User ID and password. When you select "Sign In," you receive the following error message:



Solution: If you are a School User, contact a School Administrator. If you are a School Administrator, contact another School Administrator or a District Administrator. If you are a District Administrator, contact another District Administrator. If you are a State Administrator, contact another State Administrator. They will be able to reset your password, as well as confirm your User ID.

Cannot Change Password

Scenario: On the My Account page, you select "Change Password" and enter your current password and new password. When you select "Reset Password," you receive the following error message:



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Solution: If you are a School User, contact a School Administrator. If you are a School Administrator, contact another School Administrator or a District Administrator. If you are a District Administrator, contact another District Administrator. If you are a State Administrator, contact another State Administrator. They will be able to reset your password, as well as confirm your User ID.

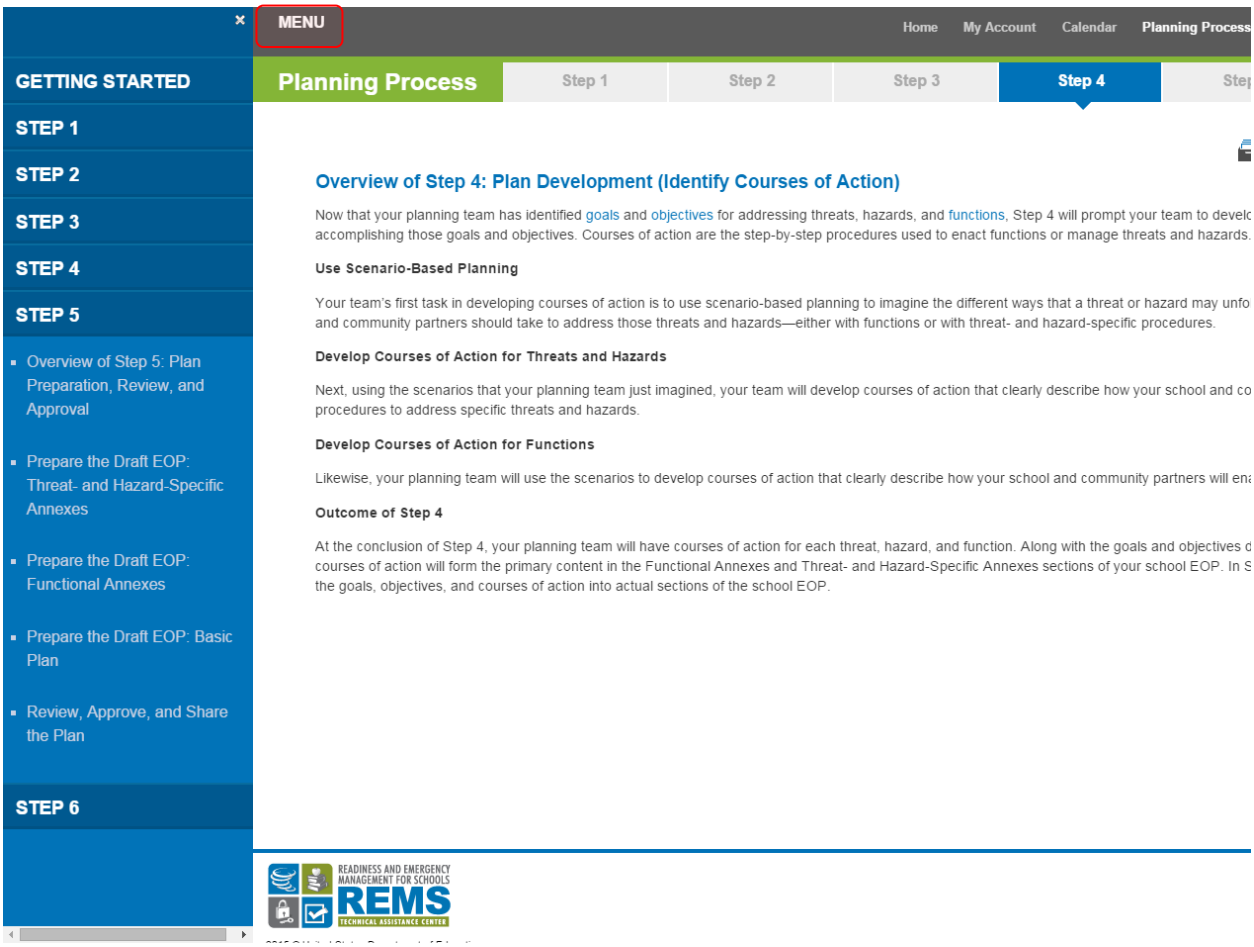
Please note: *For more information on how an Administrator can reset your password, please see* *Chapter 6*.

Need to Return to Previously Completed Step

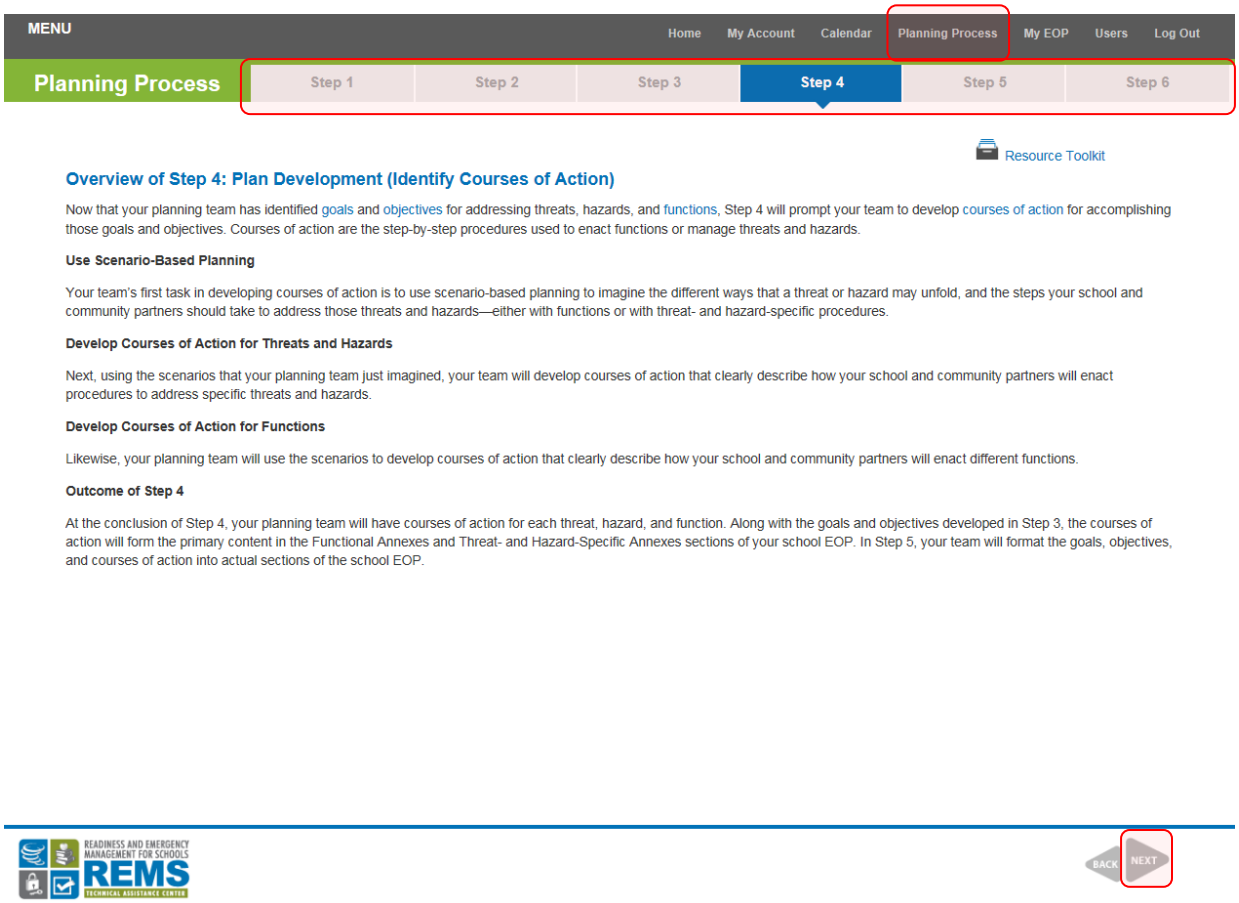
Scenario: You have completed or partially completed the planning process and would like to return to a previously completed step to delete, edit, or add information.

Please note: *If you are unsure of the exact page or step to which you want to navigate, please refer to Appendix B and/or Chapter 5.*

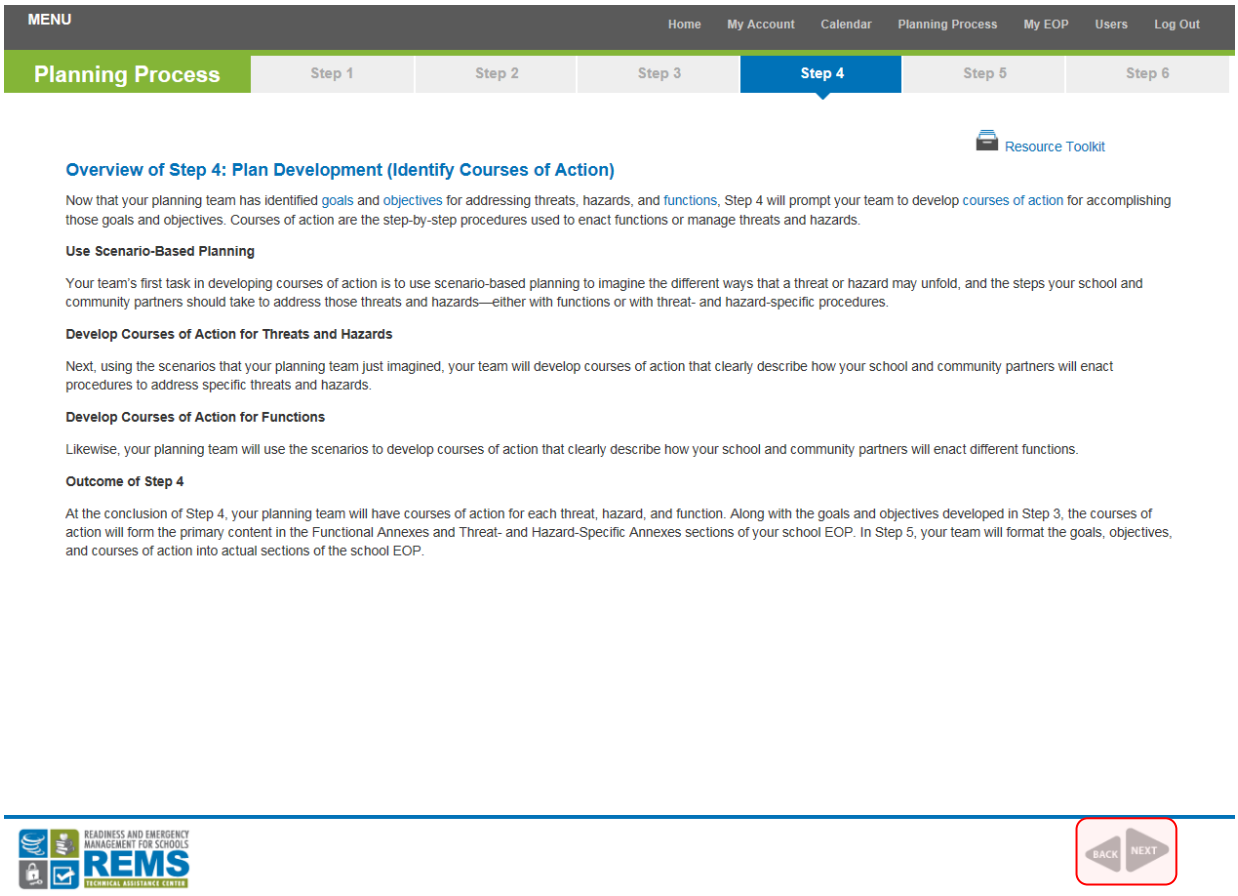
Solution A: Open the Slide-Out Menu. First, select the step to which you want to navigate. Then, select the page on which you wish to delete, edit, or add information.



Solution B: Navigate to the Planning Process section. Using the Planning Process tabs, select the step to which you want to navigate.



Solution C: If you are already in the Planning Process section, use the Next/Back buttons. Select the direction that you would like to travel, using one or a combination of the two buttons, until you have reached the page on which you wish to delete, edit, or add information.

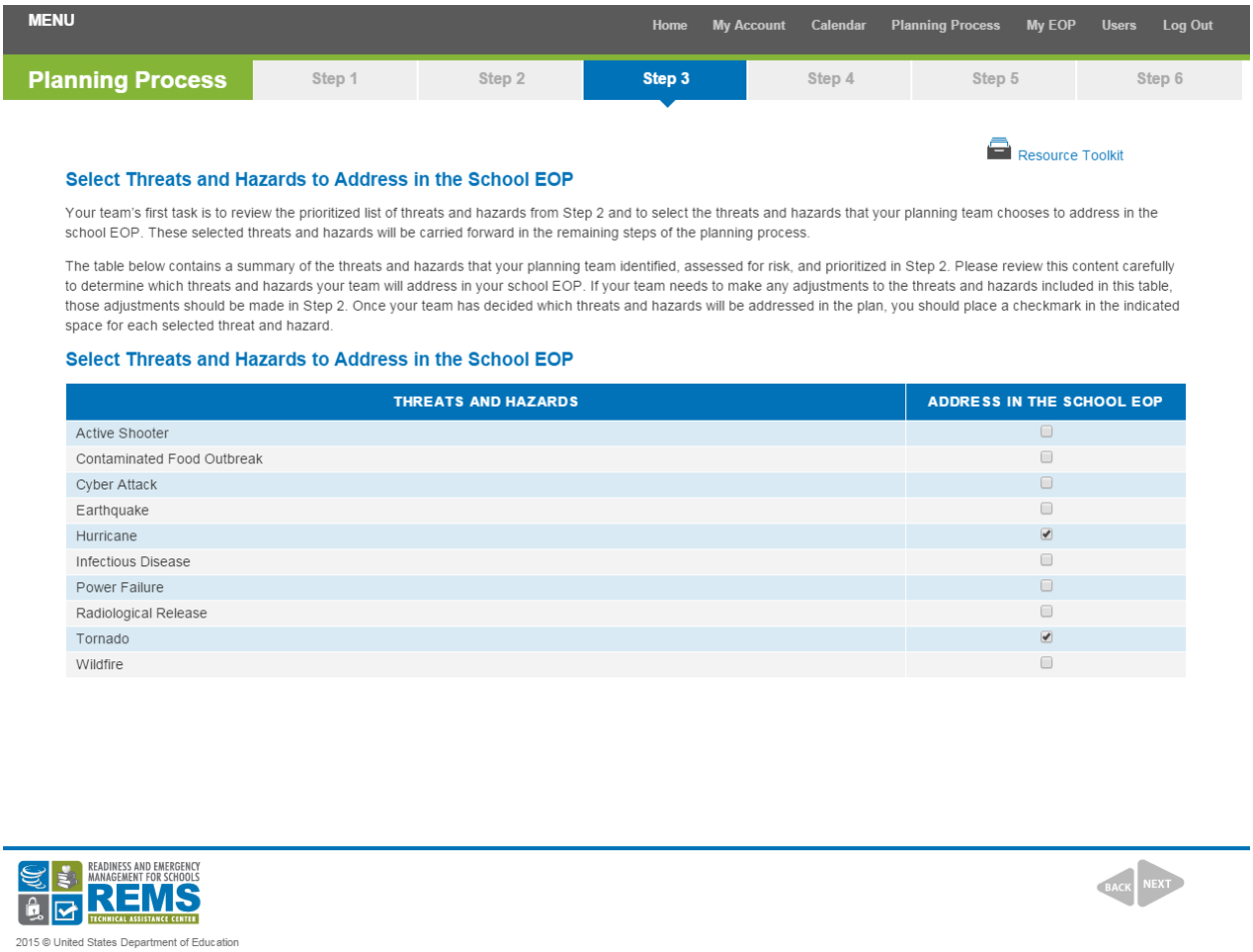


Please note: *For more information on how the Next/Back buttons work, as well as the Slide-Out Menu, Planning Process tabs, and Navigation Bar, refer to* *Chapter 4**.*

No Longer Want to Include a Threat or Hazard in School EOP

Scenario: Your planning team has mistakenly added an erroneous threat or hazard into the application that you do not want to address in your school EOP.

Solution: Keep the threat or hazard unchecked on the second page of Step 3: Select Threats and Hazards to Address in the School EOP. This will exclude the threat or hazard from appearing on the next page, where goals and objectives are developed. It will also exclude the threat or hazard from the exported school EOP, even if goals, objectives, and courses of action have been developed for the threat or hazard. Share this information with your planning team, because the threat or hazard must remain unchecked by all members.



No Longer Want to Include a Function in School EOP

Scenario: Your planning team has mistakenly added an erroneous function into the application that you do not want to address in your school EOP.

Solution 1: Do not add goals or objectives for the function on the fourth page of Step 3: Develop Goals and Objectives for Functions. The function will not progress to Step 4 and, therefore, will not be exported to the school EOP. Share this information with your planning team, because the function must remain without goals and objectives in order for it not to appear in Step 4.

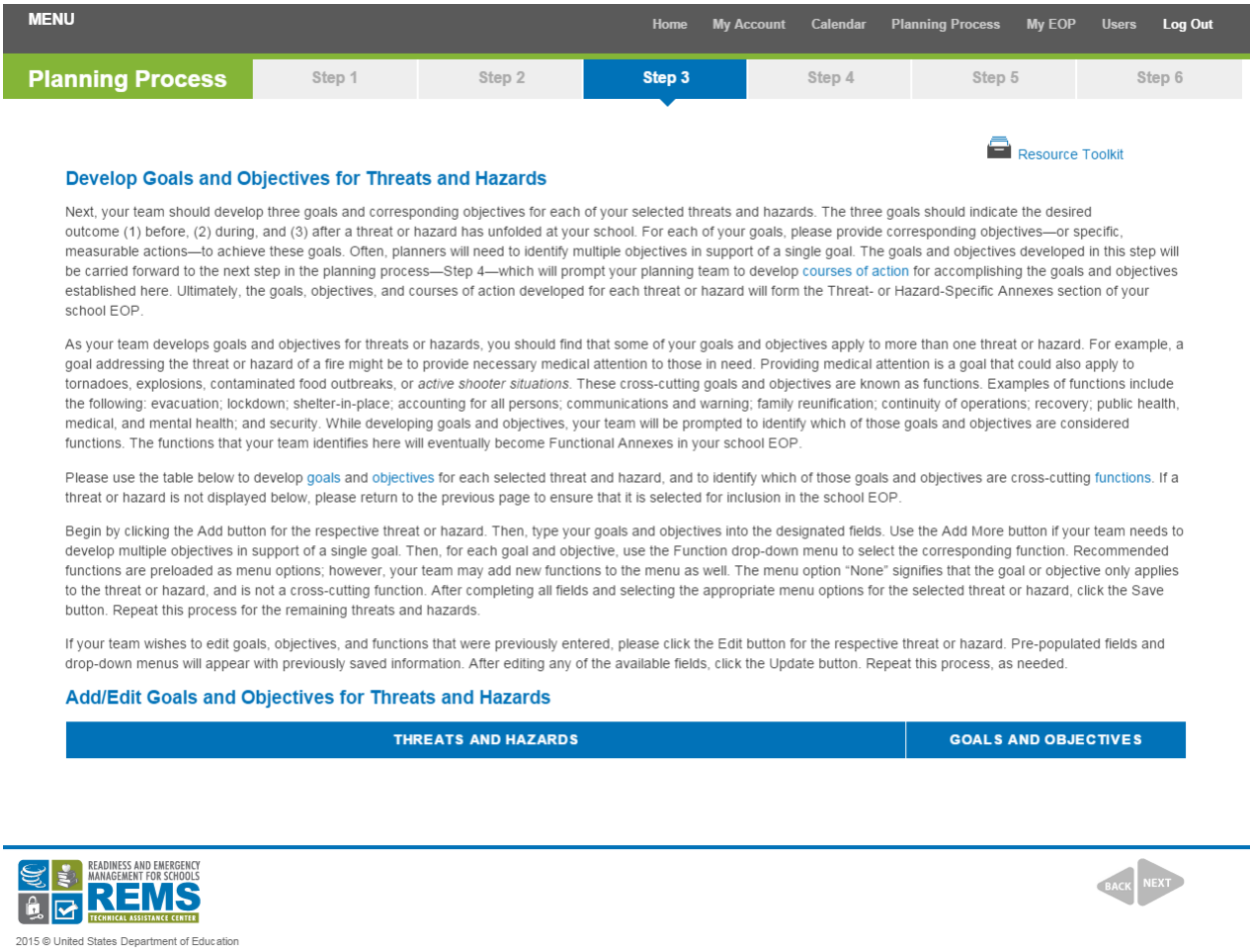
[Screenshot]

Solution 2: Do not add courses of action for the function on the fourth page of Step 4: Develop Courses of Action for Functions. The function will not progress to Step 5 and, therefore, will not be exported to the school EOP. Share this information with your planning team, because the function must remain without courses of action in order for it not to appear in Step 5 and the exported EOP.

[screenshot]

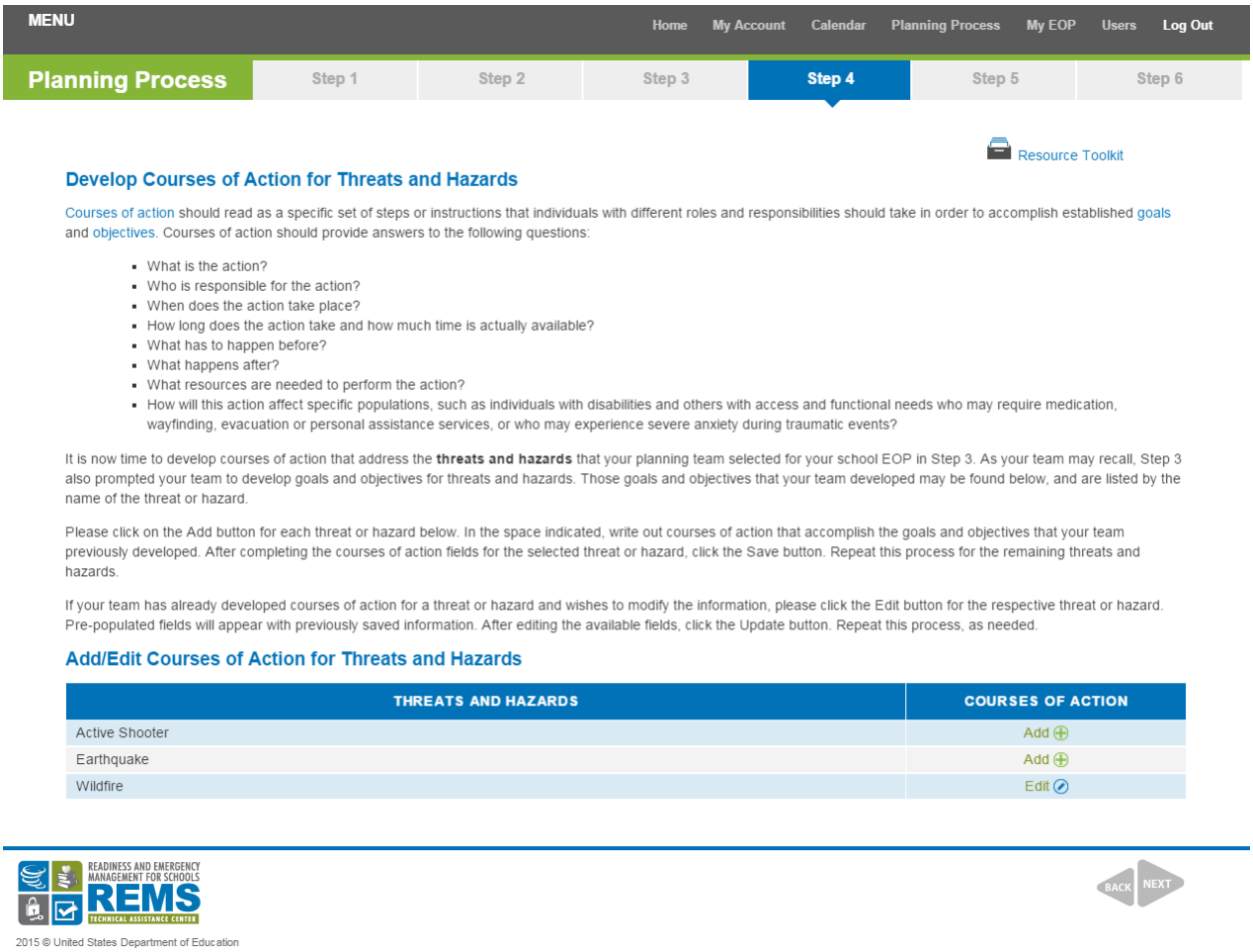
Cannot Find a Threat or Hazard That Was Previously Identified

Scenario 1: You are currently completing Step 3: Develop Goals and Objectives for Threats and Hazards, but do not see a threat or hazard in the table.



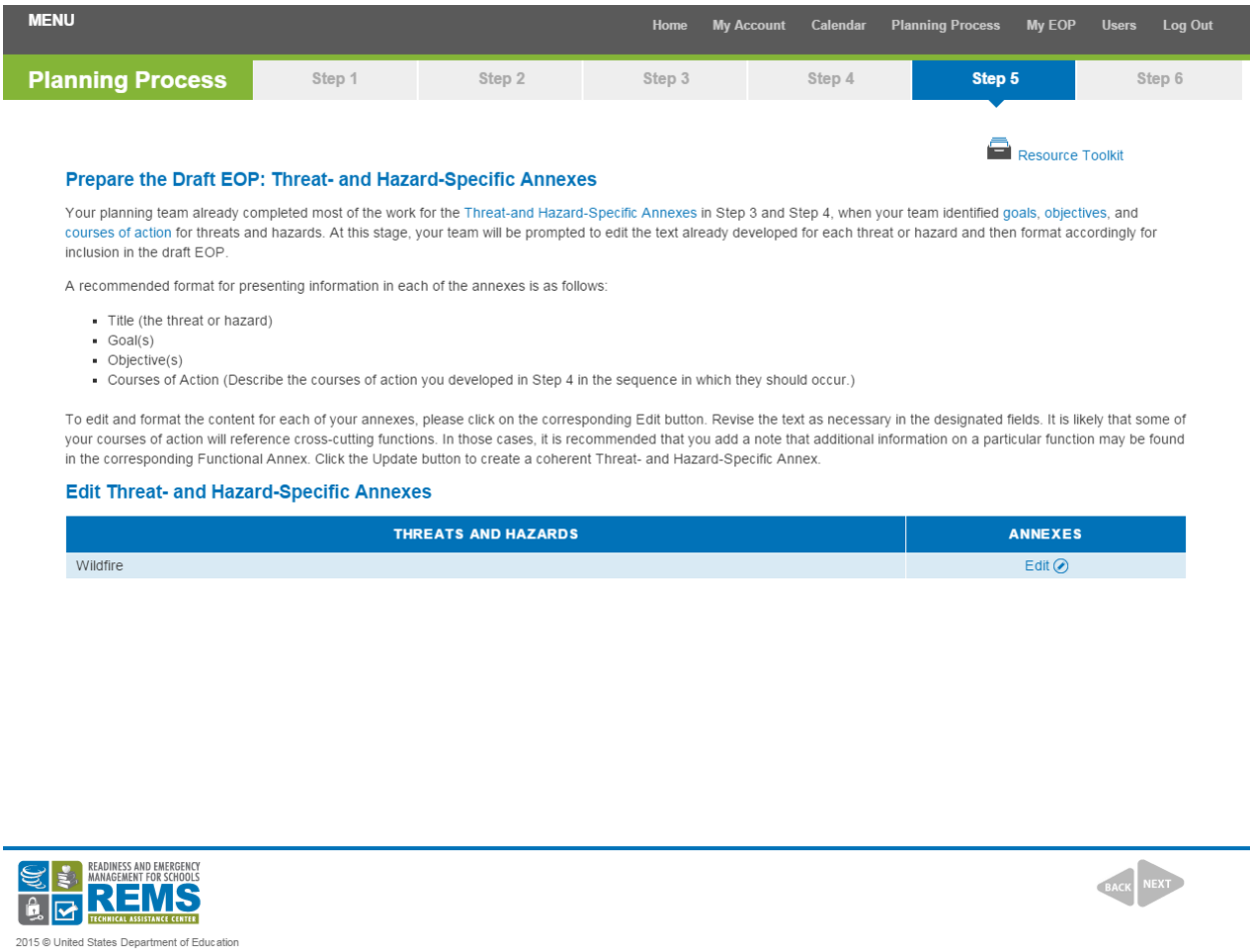
Solution 1: Return to the second page (Step 3: Select Threats and Hazards to Address in the School EOP) and ensure that your threat or hazard is selected. If it is not selected, please check it off and Save. If it is not available in the table, return to Step 2 to input the threat or hazard.

Scenario 2: You are currently completing Step 4 and wish to identify courses of action for a threat or hazard, but do not see it in the table.



Solution 2: You must first develop goals and objectives for a threat or hazard before identifying courses of action. If you do not see a specific threat or hazard, return to Step 3 to ensure that: (1) the threat or hazard has been selected to be addressed in your school EOP, and (2) that goals and objectives have been added to the threat or hazard. After you select the threat or hazard and add goals and objectives, proceed to Step 4. If you do not see your threat or hazard in Step 3, please refer to Scenario 1.

Scenario 3: You are currently completing Step 5 and wish to edit the threat- and hazard-specific annexes of your school EOP, but do not see the threat or hazard in the table.

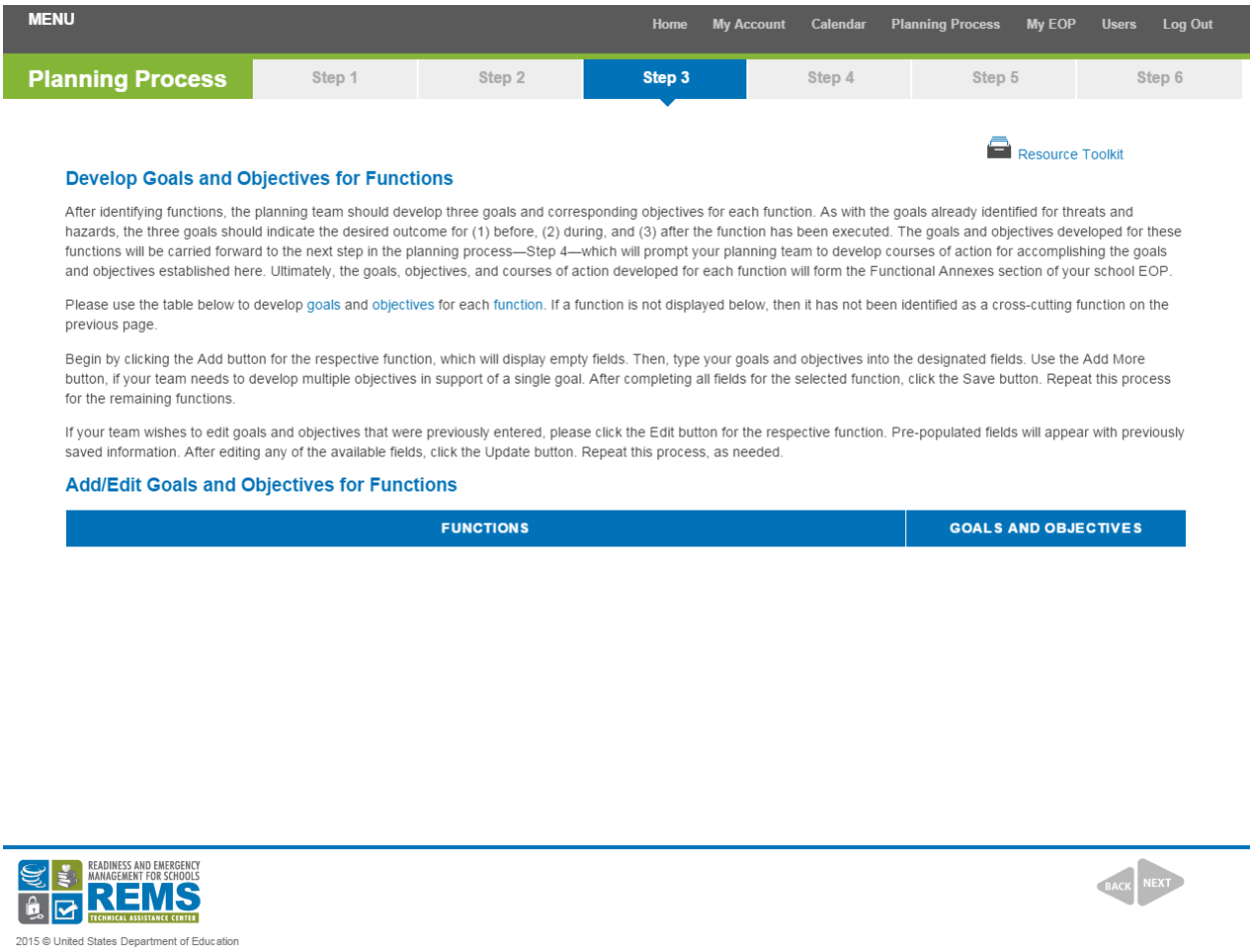


Solution 3: You must first develop goals and objectives and then courses of action before you can prepare the draft threat- or hazard-specific annex. If you do not see a specific threat or hazard, return to Step 4 to ensure that you have identified courses of action for that threat or hazard. If not, add the courses of action and proceed to Step 5. If you do not see your threat or hazard in Step 4, please refer to Scenario 2.

Please note: *For more information on how data is transmitted throughout the Planning Process section, please see* [*Chapter 5*](#)*.*

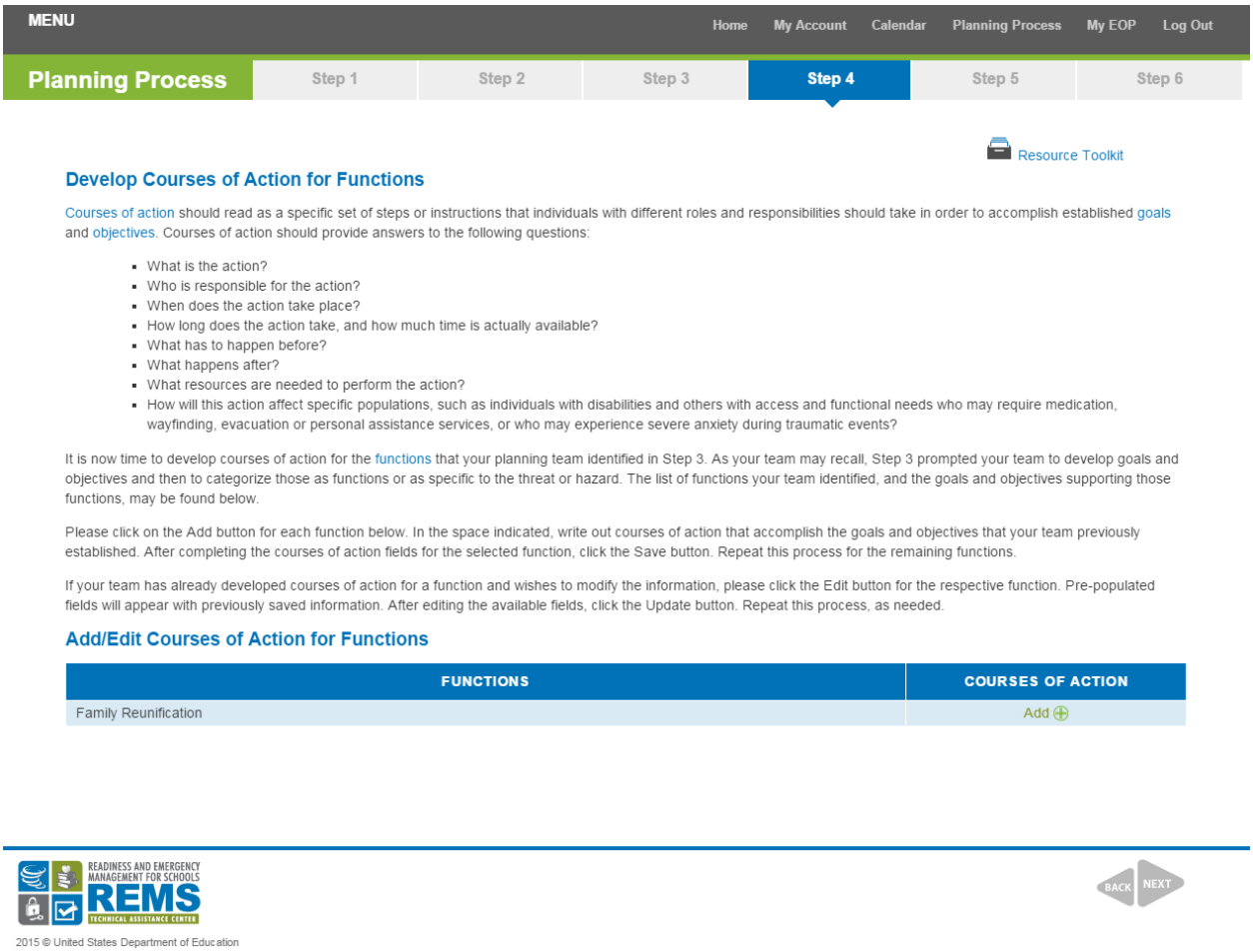
Cannot Find a Function That Was Previously Identified

Scenario 1: You are currently completing Step 3 and wish to develop goals and objectives for a function, but do not see it in the table.



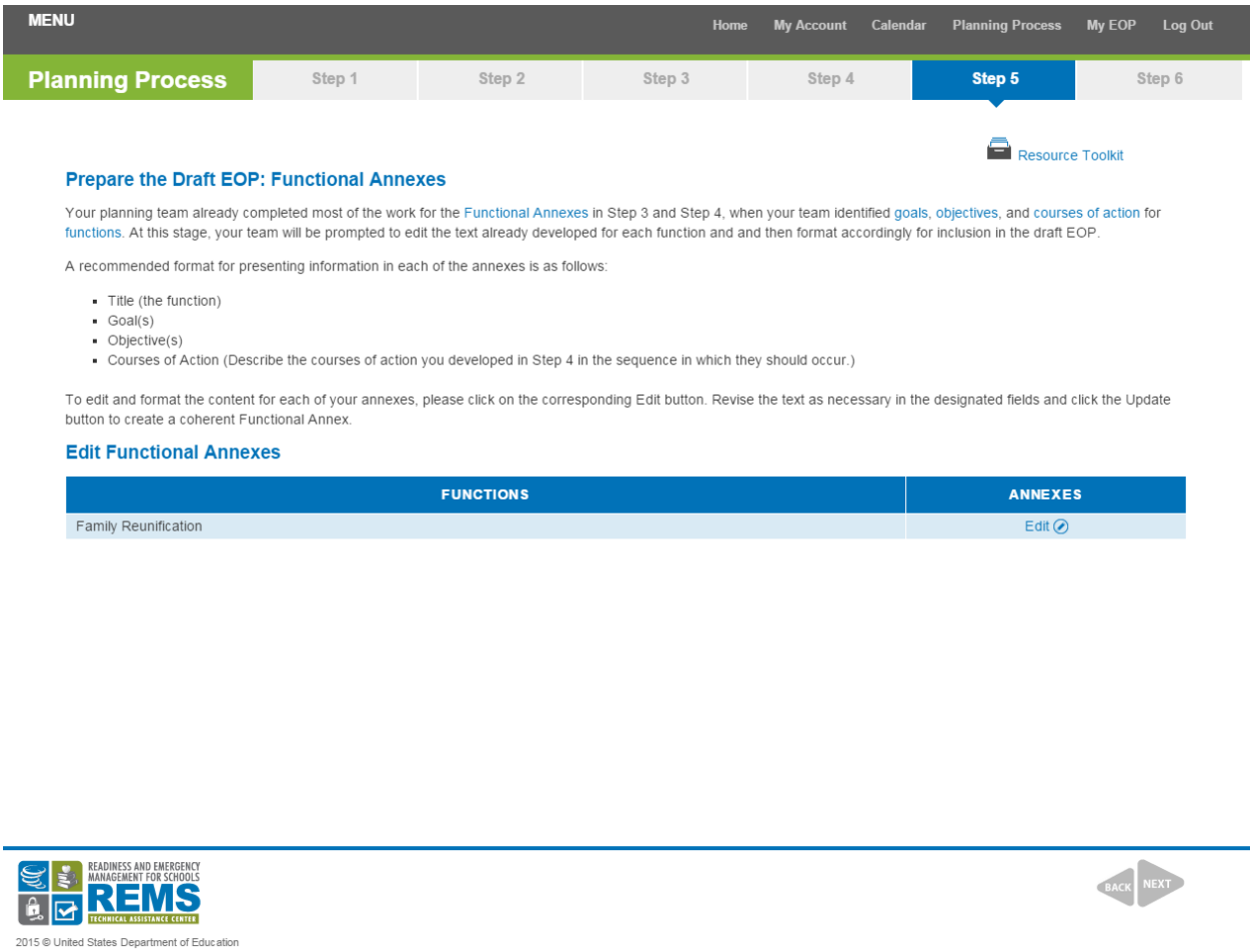
Solution 1: Return to the third page of Step 3, Develop Goals and Objectives for Threats and Hazards, and ensure that the cross-cutting function has been selected for the appropriate threat or hazard. If it is not selected, please select it and then select Save.

Scenario 2: You are currently completing Step 4 and wish to identify courses of action for a function, but do not see it in the table.



Solution 2: You must first develop goals and objectives for a function before identifying courses of action. If you do not see a specific threat or hazard, return to Step 3 to ensure that goals and objectives have been added to the function. After you add goals and objectives, proceed to Step 4. If you do not see your function in Step 3, please refer to Scenario 1.

Scenario 3: You are currently completing Step 5 and wish to edit the functional annexes of your school EOP, but do not see the function in the table.



Solution 3: You must first develop goals and objectives and then courses of action before you can prepare the draft threat- or hazard-specific annex. If you do not see a specific threat or hazard, return to Step 4 to ensure that you have identified courses of action for that threat or hazard. If not, add the courses of action and proceed to Step 5. If you do not see your threat or hazard in Step 4, please refer to Scenario 2.

Please note: *For more information on how data is transmitted throughout the Planning Process section, please see* *Chapter 5*.

Appendix B. Application Map

The following graphic depicts the organization of the application, which contains six or seven sections, depending on your User Role. These sections are identified below in green. The Home/Getting Started and Planning Process sections contain multiple pages, which are identified below in blue. Within the blue boxes, each bullet point represents a different page within that section. In the Planning Process section, the pages are grouped according to the steps in the six-step planning process.

Home/Getting Started

- Before Using EOP ASSIST
- How Teams Can Use EOP ASSIST
- Introduction to the Planning Process

My Account

Calendar

My EOP

Management*

Log Out

*State Administrators (if applicable), District Administrators, and School Administrators only

Planning Process

Step 1
- Overview of Step 1: Form a Collaborative Planning Team
- Identify a Core Planning Team
- Form a Common Framework and Define and Assign Roles and Responsibilities
- Determine a Regular Schedule of Meetings

Step 2
- Overview of Step 2: Understand the Situation
- Develop a Comprehensive List of Possible Threats and Hazards Using a Variety of Data Sources
- Evaluate Risks and Vulnerabilities of Threats and Hazards and Then Prioritize

Step 3
- Overview of Step 3: Determine Goals and Objectives
- Select Threats and Hazards to Address in the School EOP
- Develop Goals and Objectives for Threats and Hazards
- Develop Goals and Objectives for Functions

Step 4
- Overview of Step 4: Plan Development (Identify Courses of Action)
- Use Scenario-Based Planning
- Develop Courses of Action for Threats and Hazards
- Develop Courses of Action for Functions

Step 5
- Overview of Step 5: Plan Preparation, Review, and Approval
- Prepare the Draft EOP: Threat- and Hazard-Specific Annexes
- Prepare the Draft EOP: Functional Annexes
- Prepare the Draft EOP: Basic Plan
- Review, Approve, and Share the Plan

Step 6
- Overview of Step 6: Plan Implementation and Maintenance
- Train Stakeholders on the Plan
- Exercise the Plan
- Review, Revise, and Maintain the Plan
- Thank You for Using EOP ASSIST

Appendix C. Glossary

The following terminology is used throughout both EOP ASSIST and this user manual. It is recommended that you refer to this glossary in addition to the *School Guide* and http://rems.ed.gov, both which contain a more comprehensive explanation of the six-step planning process and emergency management concepts.

***Americans with Disabilities Act (ADA) of 1990*:** The ADA prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation.

Assessment: Planning teams use such tools to evaluate the risk posed by identified threats and hazards. Assessments aren't only used to develop the initial plan, but also to inform updates and revisions to the plan on an ongoing basis. Some of the most essential assessments the planning team should undertake include Capacity Assessment, Culture and Climate Assessment, School Threat Assessment, and Site Assessment.

> **Capacity Assessment:** The evaluation of the capabilities of students and staff members, as well as the services, materials, and resources of community partners.
>
> **Culture and Climate Assessment:** An evaluation of student and staff connectedness to the school, as well as problem behaviors.
>
> **School Threat Assessment:** The evaluation of communication and behaviors in order to determine whether or not a student, staff member, or other person may pose a threat.
>
> **Site Assessment:** An examination of the safety, accessibility, and emergency preparedness of a school's building and grounds.

Courses of Action: A description of how a school will accomplish each objective; this takes into consideration the what, who, when, where, why and how for each threat, hazard, and function.

Crime Prevention Through Environmental Design (CPTED): Strategies implemented to directly modify the environment to take advantage of pre-existing environmental assets or to change the design features and condition of particular targets (e.g., school buildings, doors, and windows) or areas in an effort to reduce crime. Natural Surveillance, Natural Access Control, Territoriality Reinforcement, and Management and Maintenance are key principles of CPTED. In some instances, CPTED strategies are implemented during the beginning phases of a project (e.g., during planning of a new housing development).

Emergency Operations Plan (EOP): A document that describes who will do what, as well as when, with what resources, and by what authority—before, during, and immediately after an emergency. The EOP format used in EOP ASSIST contains three sections: Basic Plan, Functional Annexes, and Threat- and Hazard-Specific Annexes.

> **School EOP:** An EOP developed for and by school-level emergency planning and response teams.

Basic Plan: The school EOP section that provides an overview of the approach to emergency operations. Although the Basic Plan guides development of the more operationally oriented annexes, its primary audiences consist of the school principal, local emergency officials, and the community (as appropriate). The elements listed in this section should meet the needs of these audiences while providing a solid foundation for the development of supporting annexes. For more information on the components of this section, please refer to pages 23–28 of the *School Guide.*

Functional Annexes: The school EOP section that details the goals, objectives, and courses of action of functions (e.g., evacuation, communications, and recovery) that apply across multiple threats or hazards. Functional annexes set forth how the school manages a function before, during, and after an emergency. For more information on this section, please refer to pages 28–36 of the *School Guide.*

Threat- and Hazard-Specific Annexes: The school EOP section that specifies the goals, objectives, and courses of action that a school will follow to address a particular type of threat or hazard (e.g., hurricane, *active shooter*). Threat- and hazard-specific annexes, like functional annexes, set forth how the school manages a function before, during, and after an emergency. For more information on this section, please refer to pages 35–36 of the *School Guide.*

***Family Educational Rights and Privacy Act (FERPA)*:** Legislation that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education. *FERPA* gives parents certain rights with respect to their children's education records. These rights transfer to the student when he or she reaches the age of 18 or matriculates beyond the high school level. Students to whom the rights have transferred are "eligible students." For more information on *FERPA*, please refer to pages 39–50 of the *School Guide*.

Function: An activity that applies to more than one threat or hazard. Examples of functions include the following: evacuation; lockdown; shelter-in-place; accounting for all persons; communications and warning; family reunification; continuity of operations; recovery; public health, medical, and mental health; and security.

Goals: The broad, general statements that indicate the desired outcome in response to the threat or hazards identified by the planning team. Goals identify what personnel and other human resources are supposed to achieve. They also help identify when major activities are complete and what defines a successful outcome.

***Health Insurance Portability and Accountability Act (HIPAA)*:** Legislation that provides Federal protections for individually identifiable health information held by covered entities and their business associates, and that gives patients an array of rights with respect to that information. At the same time, the Privacy Rule is balanced so that it permits the disclosure of health information needed for patient care and other important purposes.

Incident Command System (ICS): A standardized on-scene incident management concept designed specifically to let responders adopt an integrated organizational structure equal to the complexity and

demands of any single incident or multiple incidents without being hindered by jurisdictional boundaries.

Command Staff: The staff members who report directly to the Incident Commander (IC), including the Public Information Officer (PIO), Safety Officer, Liaison Officer, and other positions as required per ICS. They may have an assistant or assistants, as needed.

Liaison Officer: A member of the Command Staff responsible for coordinating with representatives from cooperating and assisting agencies or organizations, per ICS.

PIO: A member of the Command Staff responsible for interfacing with the public and media and/or with other agencies with incident-related information requirements, per ICS.

Safety Officer: A member of the Command Staff responsible for monitoring incident operations and advising the IC on all matters relating to operational safety, including the health and safety of emergency responder personnel, per ICS.

Common Operating Picture: An overview of an incident by all relevant parties that provides incident information enabling the IC/Unified Command and any supporting agencies and organizations to make effective, consistent, and timely decisions.

Finance/Administration Section: The ICS section that describes all administrative and financial considerations surrounding an incident.

IC: The individual responsible for all incident activities, including the development of strategies and tactics and the ordering and release of resources. The IC has overall authority and responsibility for conducting incident operations and is responsible for the management of all incident operations at the incident site.

Operations Section: The ICS section that describes all tactical incident operations and implementation of the Incident Action Plan. In the ICS, the Operations section normally includes subordinate branches, divisions, or groups.

Planning Section: The ICS section that describes a plan for the collection, evaluation, and dissemination of operational information related to the incident, and a plan for the preparation and documentation of the Incident Action Plan. The Planning section also maintains information on the current and forecasted situation and on the status of resources assigned to the incident.

Interoperability: The ability of systems, personnel, and equipment to provide and receive functions, data, information, and services to and from other systems, personnel, and equipment and between both public and private agencies, departments, and other organizations, in a manner enabling them to operate effectively together. Interoperability allows emergency management/response personnel and their affiliated organizations to communicate within and across agencies and jurisdictions via voice, data, or video-on-demand in real time, when needed and authorized.

National Incident Management System (NIMS): A systematic, proactive approach to guide departments and agencies at all levels of government, nongovernmental organizations, and the private sector to work together seamlessly and manage incidents involving all threats and hazards—regardless of cause, size, location, or complexity—in order to reduce loss of life and property and harm to the environment.

> **Chain of Command:** The orderly line of authority within the ranks of the incident management organization that is a key concept of NIMS.
>
> **Logistics:** The process and procedure for providing resources and other services to support incident management, per NIMS.
>
> **Situation Report:** The confirmed or verified information regarding the specific details relating to an incident that is a key component of NIMS.

Navigation Bar: The EOP ASSIST feature that allows users to navigate through various sections. The Navigation Bar is located in the gray ribbon in the upper right-hand corner of the screen.

Objectives: The specific, measurable actions that are necessary to achieve the goals. Often, the planning team will need to identify multiple objectives in support of a single goal.

Page Title: The EOP ASSIST feature that indicates on which page the user is currently located within the Planning Process and Home/Getting Started sections. The Page Title is located below the Section Heading and, if the user is in the Planning Process section, below the Planning Process tabs.

Planning Process Tabs: The EOP ASSIST feature that allows users to navigate between steps in the Planning Process section, and that indicates which step the user is currently located within the Planning Process section. The Planning Process tabs are located below the Navigation Bar and parallel to the Section Heading.

Presidential Policy Directive 8 (PPD-8): Signed by President Barack Obama in March 2011, it describes the nation's approach to preparedness. This directive represents an evolution in our nation's collective understanding of national preparedness, based on the lessons learned from terrorist attacks, hurricanes, school incidents, and other experiences. It defines preparedness around five mission areas: prevention, protection, mitigation, response, and recovery.

> **Prevention:** The capabilities necessary to avoid, deter, or stop an imminent crime or threatened or actual mass casualty incident. Prevention is the action schools take to prevent a threatened or actual incident from occurring. In the broader PPD-8 construct, the term "prevention" refers to those capabilities necessary to avoid, prevent, or stop a threatened or actual act of terrorism. The term "prevention" also refers to preventing imminent threats.
>
> **Protection:** The capabilities to secure the campus against acts of violence and manmade or natural disasters. Protection focuses on ongoing actions that protect students, educators, staff members, visitors, networks, and property from a threat or hazard.

Mitigation: The capabilities necessary to eliminate or reduce loss of life and property damage by lessening the impact of an event or emergency. In this document, mitigation also means reducing the likelihood that threats and hazards will happen.

Recovery: The capabilities necessary to assist schools affected by an event or emergency in restoring the learning environment. It is also one of the functions that schools should address in developing a comprehensive, high-quality school EOP.

Response: The capabilities necessary to: stabilize an emergency once it has already happened or is certain to happen in an unpreventable way; establish a safe and secure environment; save lives and property; and facilitate the transition to recovery.

Psychological First Aid for Schools (PFA-S): An evidence-informed approach for assisting children, adolescents, adults, and families in the aftermath of an emergency incident. PFA-S is designed to reduce the initial distress caused by emergencies and to foster short- and long-term adaptive functioning and coping.

Resource Toolkit: An EOP ASSIST feature that contains additional guidance, resources, and examples to support users working through the six-step planning process. The Resource Toolkit is located in the upper right-hand corner of each page within the Home/Getting Started and Planning Process sections.

The *School Guide*: The common name for the Federal *Guide for Developing High-Quality School Emergency Operations Plans*. There is also an *IHE Guide*, which is the common name for the Federal *Guide for Developing High-Quality Emergency Operations Plans for Institutions of Higher Education*.

Six-Step Planning Process: The federally recommended planning process for creating a comprehensive and high-quality school EOP. The six-step planning process is described throughout the *School Guide* and involves working collaboratively with a team. Involving six different steps, it is flexible and should be adapted based on the unique characteristics of the school, district, and situation.

Slide-Out Menu: An EOP ASSIST feature that allows users to navigate quickly and directly to any page within the Home/Getting Started and Planning Process sections. The Slide-Out Menu is located in the upper left-hand corner of the screen.

Users: Members of a school's collaborative planning team that have access to EOP ASSIST and use the application to work through the six-step planning process and, ultimately, generate a high-quality school EOP. There are five types of user roles with varying permissions and capabilities: School Users, School Administrators, District Administrators, State Administrators, and the Super Administrator.

Super Administrator: There is one Super Administrator for EOP ASSIST, who has rights to all management functions of the application. At least three IT personnel at the institution hosting the EOP ASSIST (either state agency, district, or school) should have access to the log-in credentials for this account. The purpose of the Super Administrator is to set up the application for other user accounts and to serve as the database manager of EOP ASSIST. The Super Administrator can create, block, reactivate, and delete all user accounts; modify all user

accounts; reset passwords; create, modify, and delete all district and school profiles; and control state access to school EOPs.

State Administrators: This user role only exists when a state entity is hosting EOP ASSIST. State Administrators serve as the primary points of contact for District Administrators within their state and for School Administrators from independent schools. State Administrators can create, modify, block and reactivate and reset passwords for all District Administrator, School Administrator, School User, and other State Administrator accounts within their state. State Administrators can also create and modify district and school profiles within their state.

> While State Administrators do not have access to the Planning Process section for individual schools, they can enable the right to gain access to a school EOP once it has been generated. State Administrators also may use the Planning Process section to develop a sample school EOP and to use the Calendar for the state-level team. The ICS recommends having at least one designated individual and two back-up personnel for each essential position. As such, it is recommended that there are at least three State Administrators for each state hosting EOP ASSIST.

District Administrators: The primary points of contact for School Administrators within their district. District Administrators can create, modify, block, and reactivate and reset passwords for all School Administrator, School User, and other District Administrator accounts within their district. District Administrators are also responsible for creating and modifying school profiles within their district. An extra privilege of District Administrators is that they can access and contribute to each school EOP within their district, and their Calendar displays all events planned for each school.

> If District Administrators are using the state's account of EOP ASSIST, District Administrators may also grant or deny the state access to school EOPs in their district. The ICS recommends having at least one designated individual and two back-up personnel for each essential position. As such, it is recommended that there are at least three District Administrators for each district using EOP ASSIST.

School Administrators: The primary points of contact for their school collaborative planning team, and they're located at the school level. School Administrators can create, modify, block, and reactivate and reset passwords for all School User and other School Administrator accounts at their school only. Since School Administrators are also members of the core planning team, they can access and contribute to their school EOP through the Planning Process section and to their school's Calendar.

> If School Administrators are using the state's account of EOP ASSIST, School Administrators may also grant or deny the state access to their school EOP. The ICS recommends having at least one designated individual and two back-up personnel for each essential position. As such, it is recommended that there are at least three school Administrators for each school using EOP ASSIST.

School Users: Members of the core planning team who have all the required permissions to participate in the six-step planning process and to contribute to their school EOP. School Users cannot see data from any other school, and do not have permissions that let them manage other users. School Users can update any information throughout the application, including their own personal information in the My Account section. Further, some School Users may have view-only permissions, such as any individuals who may need to see the school EOP, but who required to contribute to it. This feature is enabled by an Administrator. It restricts such users from adding or editing the Planning Process and Calendar sections, although they still have access to view such data.

Vulnerabilities: The characteristics of the school campus (e.g., structures, equipment, IT or electrical systems, grounds, surrounding area) that could make it more susceptible to the identified threats and hazards.