United States Department of Agriculture

NRCS

Natural Resources Conservation Service
P.O. Box 2890
Washington, D.C. 20013

June 7, 2010

GENERAL MANUAL (GM)
180-CPA
Circular No. 3, Part 409

Subject: CPA – Phase One of the Transition of the National Conservation Planning Database (NCP) to a Future Streamlined Conservation Delivery Business Model

Purpose. To provide national instructions for conservation planning using Customer Service Toolkit to begin transitioning to one practice schedule per customer folder.

Effective Date. This circular is effective upon receipt.

Background. Customer Service Toolkit, commonly referred to as "Toolkit," is the primary tool used by NRCS for documenting conservation planning decisions at the field level. Planning data from Toolkit is stored in the National Conservation Planning Database (NCP) where it can be accessed by Toolkit and other NRCS applications. Due to a lack of standardized guidance, each State has created separate policies and direction for the use of Toolkit, the organization of Toolkit files, and the specific data required for a conservation plan. This lack of national consistency has resulted in a database that is not reliable for tracking application of conservation on the ground, predicting workload, and measuring effectiveness of NRCS programs; it also creates inefficiencies that waste time for field staff.

The Conservation Delivery Streamlining Initiative (CDSI) is striving to address the issues that have created the current state of the NCP. The vision for the future is to eliminate the need for field planners to think about file folder organization or structure for plans, and make all technical and financial information about a client accessible through a single conservation desktop. A key component of the future model is to have only one digitized land unit for any unit of land. In the interim, as the CDSI teams work toward the long-term solution, the agency will work to limit additional overlap and duplication of plan data in the NCP by putting into place a national standard for conservation plan development using Toolkit. This policy is designed to be an initial step towards a larger NCP cleanup effort, while minimizing the workload and impact to field office staff.

Explanation. Starting immediately, the following instructions apply to folders and plans currently being created or revised:

(1) Any particular land unit should be located in only one Toolkit folder.

(i) When creating a new Toolkit customer folder, users should first make sure the customer does not already have a folder that includes the relevant land units.

(ii) If multiple customer folders exist for a unit of land, the duplicate folders should be deleted when possible.

(2) Only one practice schedule will be created per customer folder. When working with existing customer folders that contain multiple conservation plans—

(i) Identify the primary plan and begin doing all future planning as a revision to that plan's practice schedule.

(ii) The extra conservation plans in the folder should be deleted or archived unless they contain practices linked to a contract.

(3) All land unit boundaries must be digitized and attributed in Toolkit using the primary plan's land unit layer. This policy was originally transmitted by National Bulletin-170-5-1 in 2005.

Digitizing nonmanagement planned practices will be required when the new business model is implemented. Therefore, offices are encouraged to begin digitizing these in the primary plan's practice layer.

(4) Exceptions.—The following plans and folders are exempt from the above rules:

(i) CSP 02 and CSP 08 stewardship plans and folders (follow current CSP manual and instructions for stewardship plans).

(ii) Plans and folders with practices linked to active contracts.

The future business model, when Toolkit plan data is captured, managed, and analyzed in a geospatial format, will be significantly more efficient for the field. However, NRCS cannot implement tools that take advantage of Geographic Information Systems (GIS) until plan data is consistently digitized across all States.

See attachment for detailed information on how to carry out the above requirements in Toolkit.

Contact. Questions should be directed to Arlen Ricke, Natural Resource Specialist, Conservation Technical Assistance and Planning Team, at (202) 720-1868.

/s/

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Attachment – Using Toolkit for Maintaining One Customer Folder for Any Particular Land Unit and One Practice Schedule per Customer Folder in the National Conservation Planning Database (NCP)

Using Toolkit for Maintaining One Customer Folder for Any Particular Land Unit and One Practice Schedule per Customer Folder in the National Conservation Planning Database (NCP).

Creating new Toolkit Folders

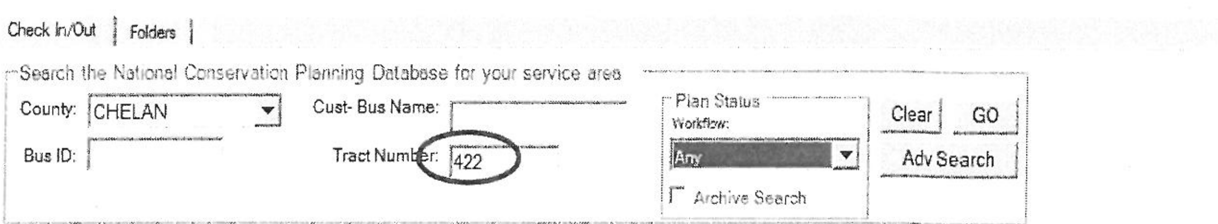
When creating a new Toolkit customer folder, users should always check first to make sure the customer does not already have a folder that includes the relevant land units.

Using the "Check In/Out" tab in Toolkit, conduct a search by tract number and another by customer or business name to locate folders that may contain duplicate land units or additional conservation plans for a customer.

Search for Tract

Use the tract search to find if the tract is in the NCP.

Find the correct customer folder to work from to edit the practice schedule.



National Conservation Planning Database

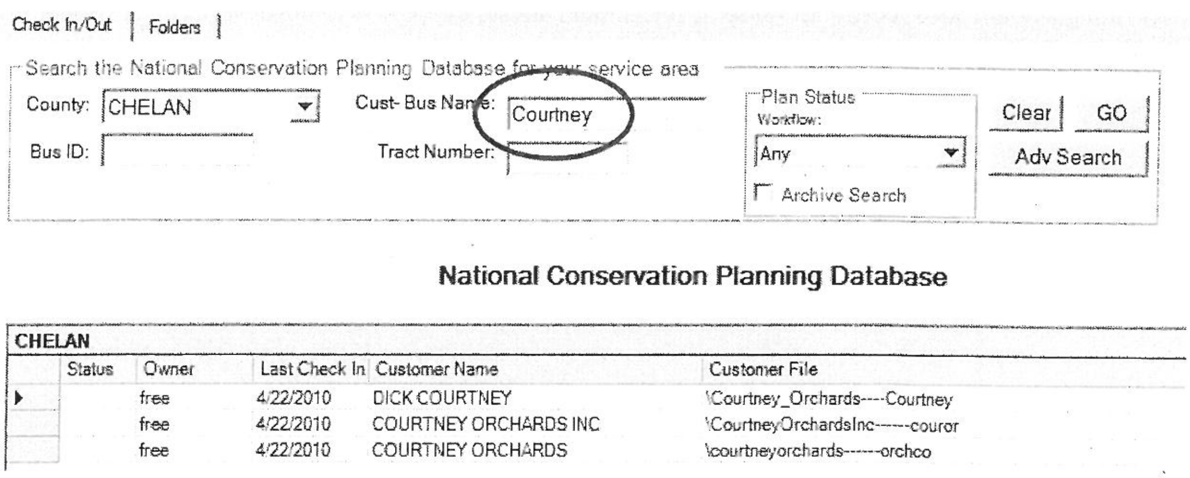
CHELAN					
	Status	Owner	Last Check In	Customer Name	Customer File
▸		free	2/17/2006	DICK COURTNEY	\Courtney_Orchards----Courtney
		free	3/4/2010	COURTNEY ORC	\CourtneyOrchardsInc------couror
		free	3/1/2010	COURTNEY ORC	\courtneyorchards------orchco

In this case, the same land units may be located in more than one folder. The user will need to determine the folder best suited to contain the primary/master plan.

<u>Search for Customer Folder</u>

Use the Customer /Business Name to search for multiple customer folders.

By entering only the customer's last name, users can sometimes find multiple folders for the customer in the database.



If these folders contain some of the same land units, the user will need to determine which existing customer folder is best to begin using for all future planning.

Important:

Do not create a new plan and planned land unit layer for new practices, for different programs (EQIP and WHIP), or different types of plans (HEL Compliance and Activity Plan). Any additional practices and/or planned land unit fields should be added to the existing practice schedule and planned land unit layer in the map (project).

The exception to this rule is CSP 02 and CSP 08 Stewardship plans. Follow current CSP manual and program instructions for these plans.

Working With Existing Customer Folders

Deciding what to do with an existing conservation plan in a customer folder:

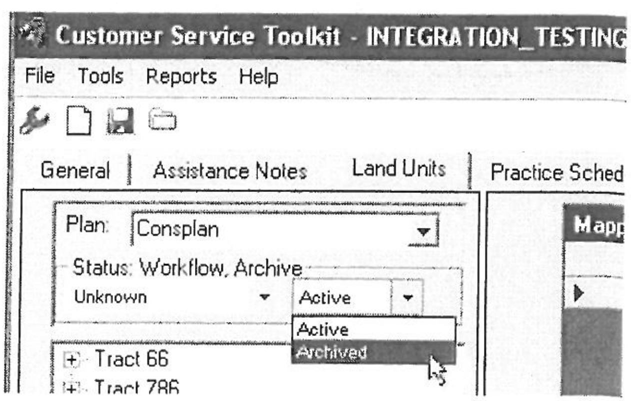
- Maintain the plan as it is
- Archive the plan
- Revise the plan
- Delete the plan
- Delete the entire folder

Maintain the Plan as it is

- If there are no other plans in the customer folder and the plan does not need a technical revision.
- If there are practices linked to ProTracts contracts.
- If the plan is a Stewardship plan for the Conservation Security Program or Conservation Stewardship Program.

Archive the Plan

- When a plan is several years old with no planned practices applied and no practices are linked to an active program contract and there is no expectation of the plan to be implemented.
- When a plan is an alternative that was not selected by the client and no planned practices have been applied and no practices are linked to an active program contract (Workflow status of "Non Selected").
- When a plan was created prior to 2005 and has not been updated since. Can be archived, even if one or more practices have been reported as applied, but not if any practices are linked to an active program contract.
- Plans with a workflow status of "Completed"



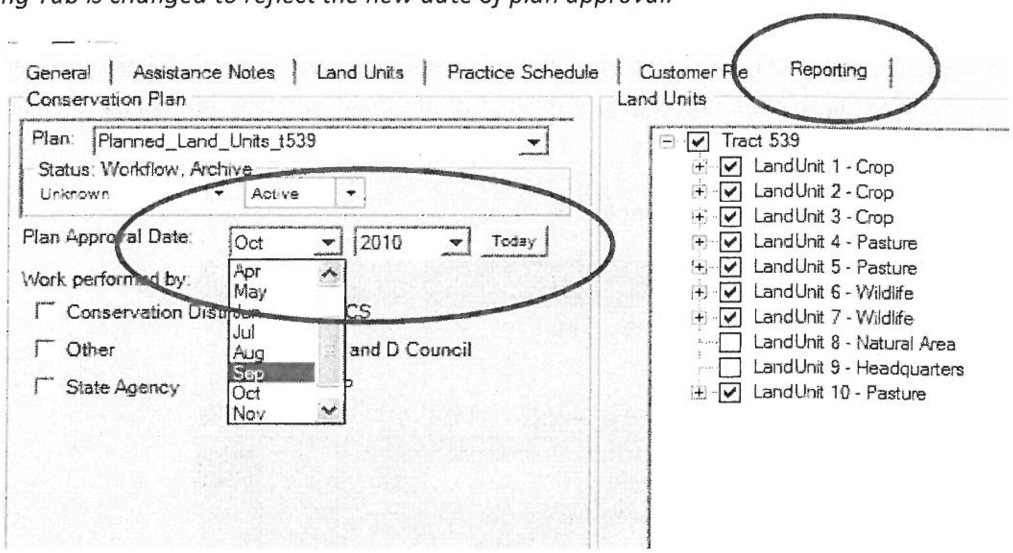
Revise the Plan

When a plan revision is needed:

- Do <u>NOT</u> make a new practice schedule, unless the existing plan(s) is/are archived first.
- When multiple plans are present, the revision must be completed using the primary/master practice schedule and planned land units.
- Practices currently linked to contracts are exempt from requirements of national bulletin. If revision is needed, practices linked to ProTracts contracts must be edited in a modification in ProTracts to the contract.
- Practices needed for future ProTracts contracts should be added to the Primary/master practices schedule.
- New land units can be digitized and added to the primary/master plan as needed.
- User should consider deleting any unreported and un-contracted scheduled practices that are no longer part of the client's plans and will not be applied.

Important:

When making major revisions to a conservation plan, make sure the Plan Approval Date in the Toolkit Reporting Tab is changed to reflect the new date of plan approval.



Adding New Items to the Existing Practices Schedule

- New practices will be added to the existing practice schedule by first using ArcMap.
  - Attributing the practices will add them to the practice schedule.
  - On the practice schedule tab, the user will only need to select the appropriate practice narrative and program.
- If another resource person, such as the grazing specialist, needs to add to the practice schedule, they will add their grazing practices to the same practice schedule.

Creating a New Plan report and/or Contract from one practice schedule

- In the Program column select the appropriate program for each practice.
  - Do not create separate plans when a customer enrolls in more than one program.
  - Multiple programs can be managed using the practice schedule "Program" column.

Schedule

Tract Number	Land Unit	Practice	Narrative	Planned Amo	Units	Month	Year	Applied Amou	Applied Date	Program	Source	Contract No.
539	5	575	G1	3315	ft	06	2005	3315	06/15/2005	CTA-GENRL	Toolkit 5.0	n/a
539	5	590	G1	1.6	ac	02	2009			CTA-GENRL	Toolkit 5.0	n/a
539	5	614	G1	8	no	06	2005	8	06/15/2005	CTA-GENRL	Toolkit 5.0	n/a
539	6	327	CP1	0.5	ac	06	2002	0.5	06/02/2002	CRP	Toolkit 5.0	n/a
539	6	645	CP1	0.5	ac	06	2005	0.5	06/30/2005	CRP	Toolkit 5.0	n/a
539	7	327	CP1	2.4	ac	06	2002	2.4	06/02/2002	CRP	Toolkit 5.0	n/a
539	7	645	CP1	2.4	ac	06	2005	2.4	06/30/2005	CRP	Toolkit 5.0	n/a
539	10	100	00N	1	no	06	2009			CRP	Toolkit 5.0	n/a
539	10	313	03N	1	no	02	1975	1	05/15/1975	CSP	Toolkit 5.0	n/a
539	10	313	01N	1	no	04	2008			CSP 2008	Toolkit 5.0	n/a
539	10	558	01N	1	no	02	1975	1	05/15/1975	CTA-GENRL ECP	Toolkit 5.0	n/a
539	10	561	G1	0.1	ac	02	2000	0.1	02/15/2000	EQIP	Toolkit 5.0	n/a
539	10	590	G1	5.6	ac	02	2009			EWP EWP-15	Toolkit 5.0	n/a

- Select the practices for the plan and/or contract you want to produce using the plan/contract wizard and create the documents

Schedule

Tract Number	Land Unit	Practice	Narrative	Planned Amo	Units	Month	Year	Applied Amou	Applied Date	Program	Source	Contract No.
539	4	590	G1	28	ac	02	2009			CTA-GENRL	Toolkit 5.0	n/a
539	5	382	01N	5575	ft	06	2005	5575	06/15/2005	CTA-GENRL	Toolkit 5.0	n/a
539	5	382	G1	8125	ft	06	2005	8125	06/15/2005	CTA-GENRL	Toolkit 5.0	n/a
539	5	528	G1	1.6	ac	06	2005	1.6	06/30/2005	CTA-GENRL	Toolkit 5.0	n/a
539	5	575	G1	3315	ft	06	2005	3315	06/15/2005	CTA-GENRL	Toolkit 5.0	n/a
539	5	590	G1	1.6	ac	02	2009			CTA-GENRL	Toolkit 5.0	n/a
539	5	614	G1	8	no	06	2005	8	06/15/2005	CTA-GENRL	Toolkit 5.0	n/a
539	6	327	CP1	0.5	ac	06	2002	0.5	06/02/2002	CRP	Toolkit 5.0	n/a
539	6	645	CP1	0.5	ac	06	2005	0.5	06/30/2005	CRP	Toolkit 5.0	n/a
539	7	327	CP1	2.4	ac	06	2002	2.4	06/02/2002	CRP	Toolkit 5.0	n/a
539	7	645	CP1	2.4	ac	06	2005	2.4	06/30/2005	CRP	Toolkit 5.0	n/a
539	10	100	00N	1	no	06	2009			CTA-GENRL	Toolkit 5.0	n/a
539	10	313	03N	1	no	02	1975	1	05/15/1975	CTA-GENRL	Toolkit 5.0	n/a

Note: You can sort by Program column and all the practice for a particular program will be grouped together.

Delete a Plan or Folder from the NCP

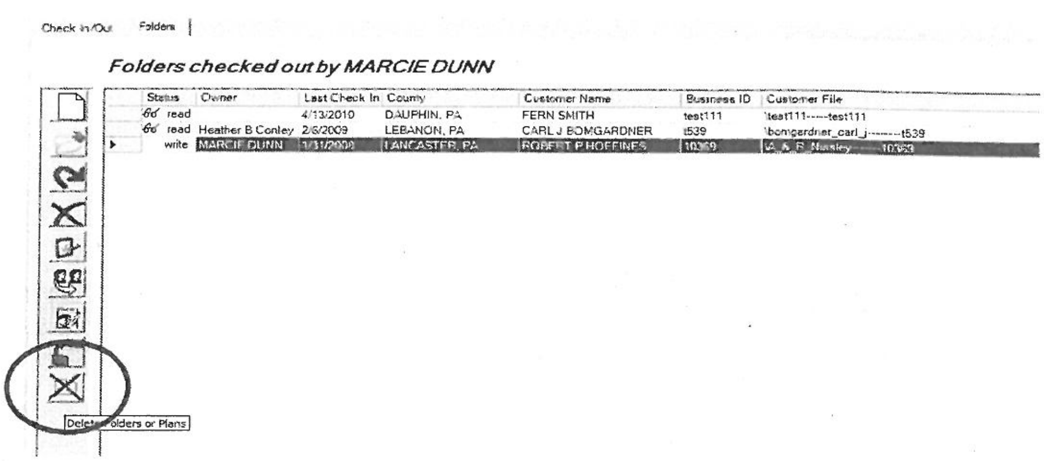
- Any Particular Land Unit should only be located in one customer folder
    - If there are multiple customer folders containing the same unit of land, the extra folders should be deleted when possible.
- A customer folder should only have one practice schedule!
    - If the customer folder has more than one plan for the same land unit, delete or archive the extra plans when possible.

Important

- *If a plan or folder has practices that are reported as applied, it should not be deleted.*
- *If a plan is linked to an active program contract, it should neither be archived nor deleted.*
- *Existing CSP Stewardship plans and folders should not be deleted.*

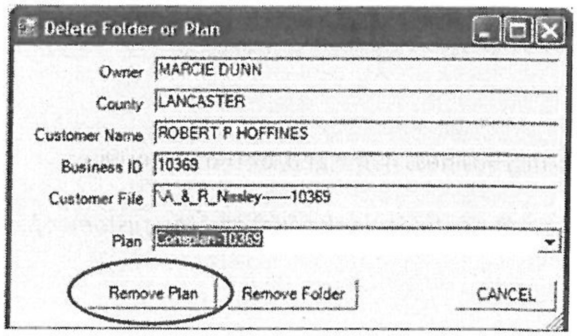
Deleting plans or Folders

- Highlight the customer folder
- Click the Delete Folders or Plans button
- If the "Delete Folders or Plans" button is not available to a user, someone with more advanced permissions will need to delete the plans or folders or the user will need follow their State's protocol for upgrading Toolkit permissions to perform the task themselves.



Deleting a Plan:

- ❖ Select the plan you want to delete from the drop down list
- ❖ Click Remove Plan



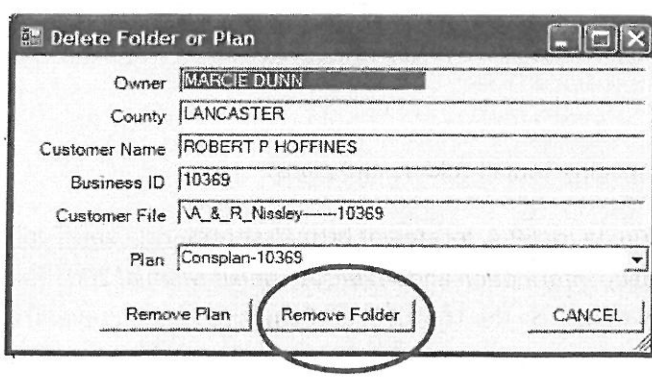
Warning:

- Don't click the Remove Folder button!
  - o If Remove Folder button is selected accidentally, the user should contact the State Toolkit Coordinator immediately and the Coordinator will contact Toolkit Support to have the folder restored.
- If a plan has practices that are in a contract, don't delete it.

Deleting a Folder:

Deleting a folder may be appropriate if the same land units are included in another folder.

- ❖ Click the Remove Folder button.
  - If a folder contains plans with practices linked to a program contract, don't delete it.
  - Make sure there are no archived plans in the folder that need to be retained before deleting a folder.



Renaming Customer Folders and Plans

To Rename a Customer Folder

- Click the Rename Customer Folder Button on the Folders Tab

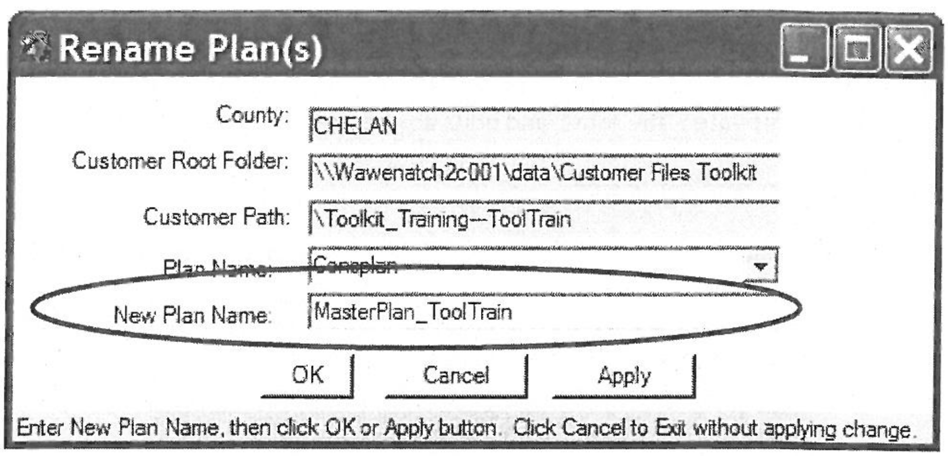
You can rename the Company/Business name and/or the Identifier

Note: This will change the customer folder in the NCP and the customer file on your local server.

To Rename a Plan

- Click on the Rename Plan(s) Button on the Folders Tab

- Select the Plan you want to rename from the dropdown list .
- Enter the new name for the plan in the New Plan Name field



Additional information for managing Toolkit folders and plans:

- Toolkit User Guide for SP-4, located at http://cst.nrcs.usda.gov/Toolkit/Help/
- The *NCP Cleanup Information* and *Arkansas Toolkit Manual 2005* folders located under "Shared Documents" on the Toolkit SharePoint site contain several documents related to cleanup activities. Go to https://nrcs.sc.egov.usda.gov/programs/btt/toolkit/default.aspx