



Natural Resources Conservation Service
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July 9, 2008

GENERAL MANUAL
PA 180 - CPA
Part 409.5 Supplement No. 1

SUBJECT: CPA – Documentation of Conservation Planning Data

Purpose. To supplement GM policy for documenting conservation planning data with directions to organize customer’s conservation planning data according to three options and authorize the creation of duplicate customer folders for contracting purposes.

Effective Date. This Supplement is effective when received.

Background. Conservation Planning Data is organized by the Customer Service Toolkit into Customer Folders that contain a conservation plan “database” and supporting planning information stored in the Customer File. The conservation plan database stores general customer information and geospatially located land unit data with a linked practice schedule table.

Conservation Planning Data can be organized into multiple customer folders each with its own conservation plan database. Contracts developed from multiple customer folders have the same practice scheduled on individual contract items for each conservation plan uploaded from Toolkit into Protracts. Contracts covering a large number of acres across multiple plans have redundant items that have caused confusion for some customers. When land units are grouped into one plan database, they are aggregated by the contract wizard into one contract item number. However, one plan database covering multiple farms and/or tracts of land are difficult to modify and transfer portions of the plan database to succeeding operators.

Filing Instructions. This Supplement should be filed in Title No.180, Part 409 between Page 409.5-1 and Page 409.6-1 in the General Manual.

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DIST: CPM Holders



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PA490.5-1 Purpose

Planners should organize conservation planning data in a manner that best suits their customers' needs. This supplemental policy directs planners to select one of three acceptable methods of organizing conservation planning data into electronic customer folders that provide the best service. Additionally, the policy authorizes planners to create duplicate folders for the purpose of efficiently and effectively developing contract documents while maintaining accurate and high quality performance reporting data.

PA409.5-2 Background

Conservation Planning Data is organized by the Customer Service Toolkit into Customer Folders that contain a conservation plan "database" and supporting planning information stored in the Customer File. The conservation plan database stores general customer information and geospatially located land unit data with a linked practice schedule table.

Conservation Planning Data can be organized into multiple customer folders each with its own conservation plan database. Contracts developed from multiple customer folders have the same practice scheduled on individual contract items for each conservation plan uploaded from Toolkit into Protracts. Contracts covering a large number of acres across multiple plans have redundant items that have caused confusion for some customers. When land units are grouped into one plan database, they are aggregated by the contract wizard into one contract item number. However, one plan database covering multiple farms and/or tracts of land are difficult to modify and transfer portions of the plan database to succeeding operators.

PA409.5-3 Policy

The conservation plan database stores general customer information and geospatially located land unit data with one linked practice schedule table. The following options are all acceptable methods of organizing conservation planning data.

1. One conservation planning database per Farm Operation containing all Tracts operated by the Customer in one single Customer Folder.
2. One conservation planning database per Farm Operation containing all Tracts operated by the Customer and Owned by the same owner per Customer Folder.
3. One conservation planning database per Tract or per contiguous block of Tracts per customer folder.

Each of the above options have different advantages and drawbacks for efficiently developing plan and contract documents and transferring data to succeeding operators to the land. Planners should choose the option that best meets their customer's and office workload needs.

Additional customer folders can be created duplicating conservation planning data from existing customer folder for the purpose of Contract Planning only. Practice performance reporting must be completed in either the original folder or the duplicate planning folder but ***not*** both to prevent double reporting.