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

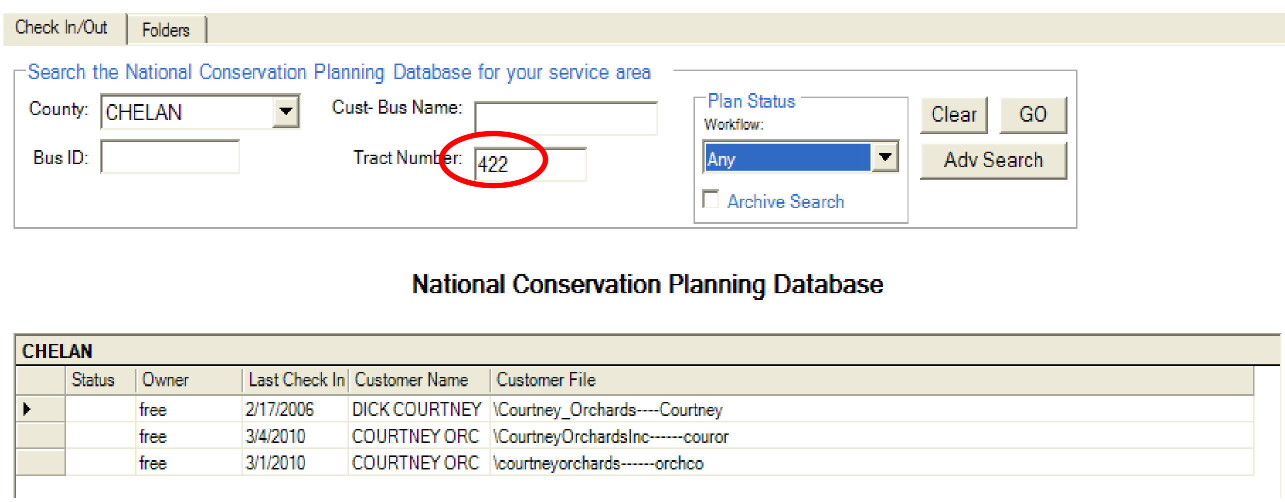
When creating a new Toolkit customer folder, users should always check first to make sure the customer does not already have a folder that includes the relevant land units.

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.

<u>Search for Tract</u>

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.

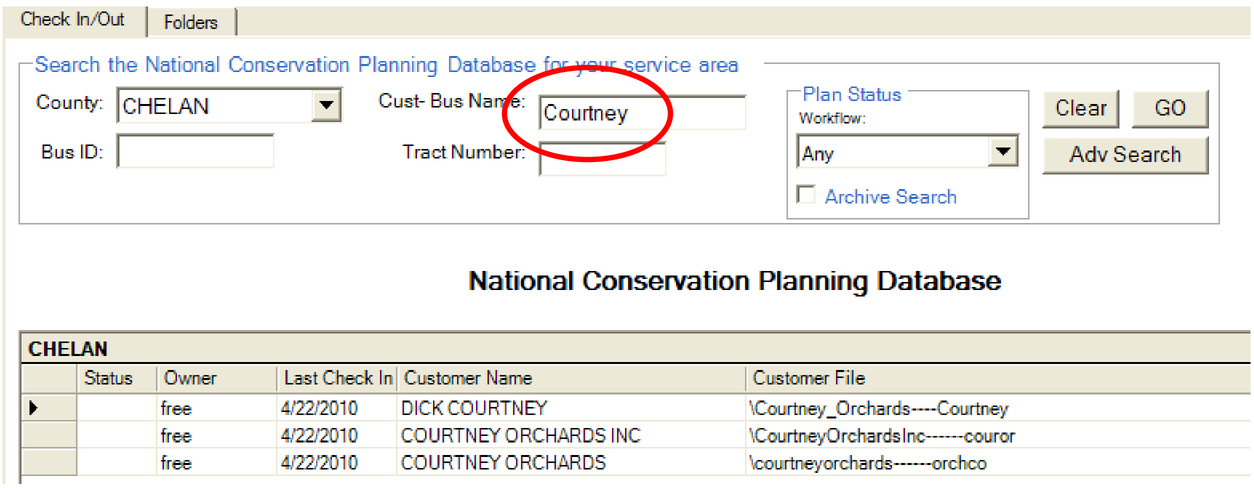


In this case, the same land units may be located in more than one folder. The user will need to determine the folder best suited to contain the primary/master plan.

<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:

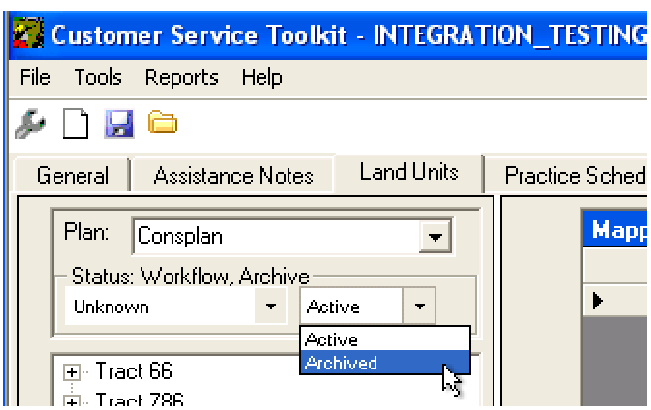
- Maintain the plan as it is
- Archive the plan
- Revise the plan
- Delete the plan
- Delete the entire folder

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"



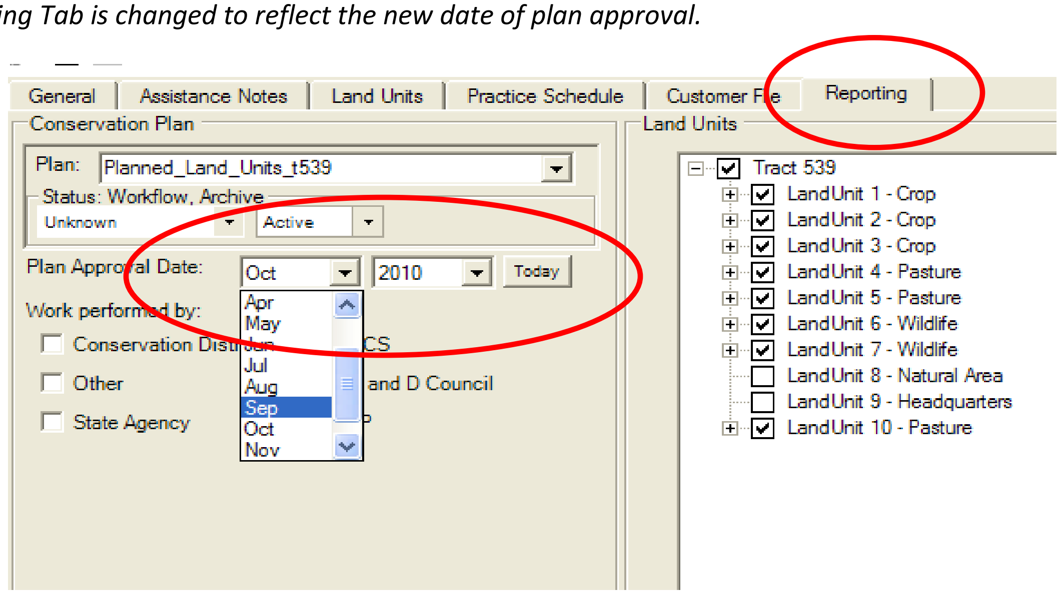
<u>Revise the Plan</u>

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-GENF / 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

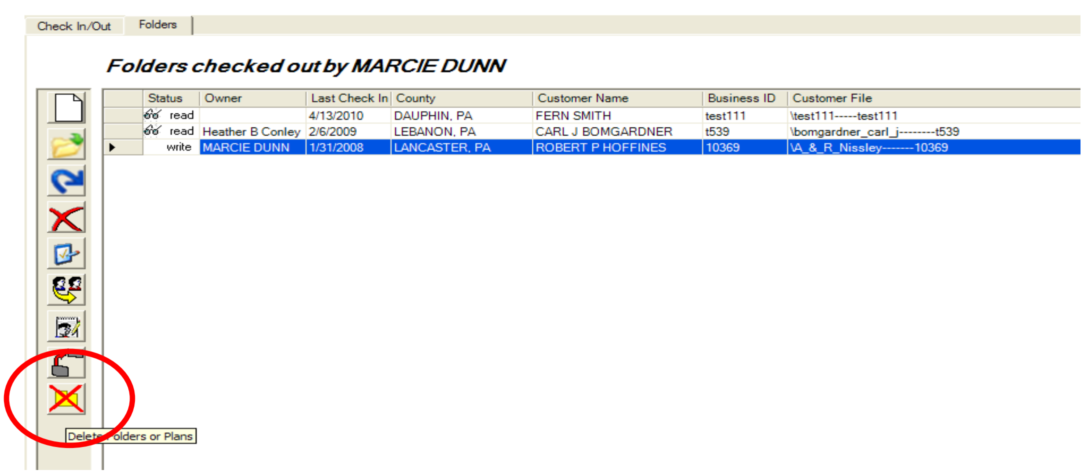
- Any Particular Land Unit should only be located in one customer folder
    - If there are multiple customer folders containing the same unit of land, the extra folders should be deleted when possible.
- A customer folder should only have one practice schedule!
    - If the customer folder has more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

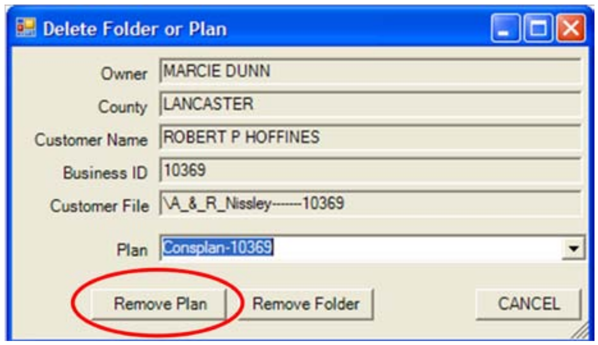
Deleting plans or Folders

- 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



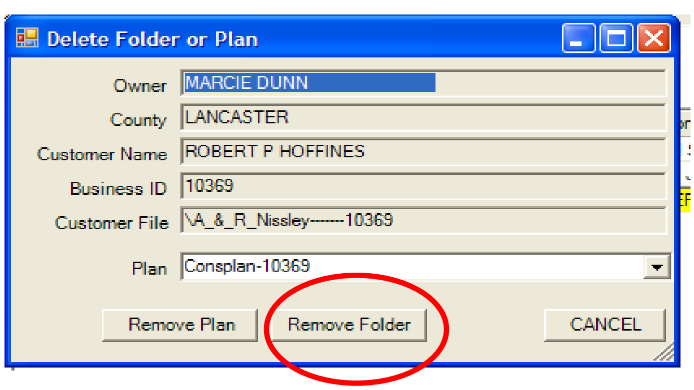
Warning:

- Don't click the Remove Folder button!
  - 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.

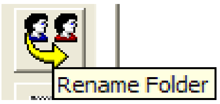
- Click the Remove Folder button.
  - If a folder contains plans with practices linked to a program contract, don't delete it.
  - Make sure there are no archived plans in the folder that need to be retained before deleting a folder.



Renaming Customer Folders and Plans

<u>To Rename a Customer Folder</u>

❖ Click the Rename Customer Folder Button on the Folders Tab

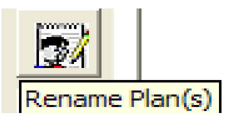


You can rename the Company/Business name and/or the Identifier

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

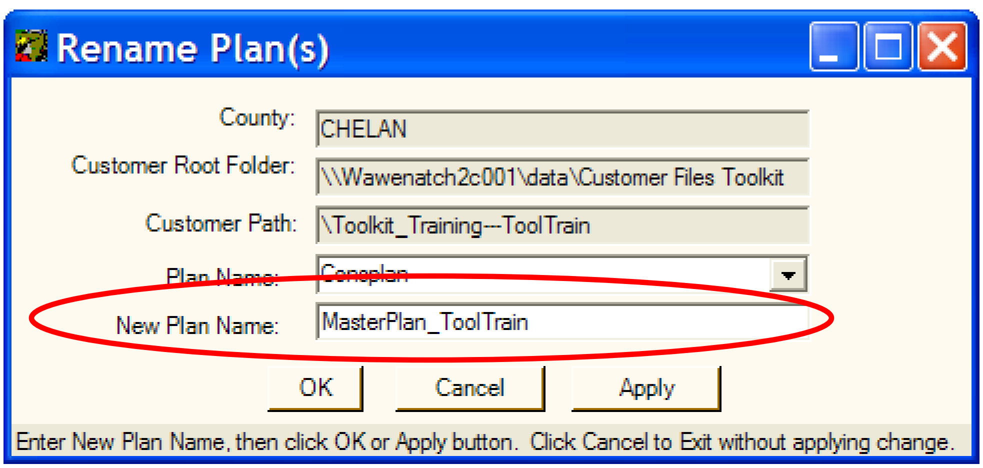
<u>To Rename a Plan</u>

❖ 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