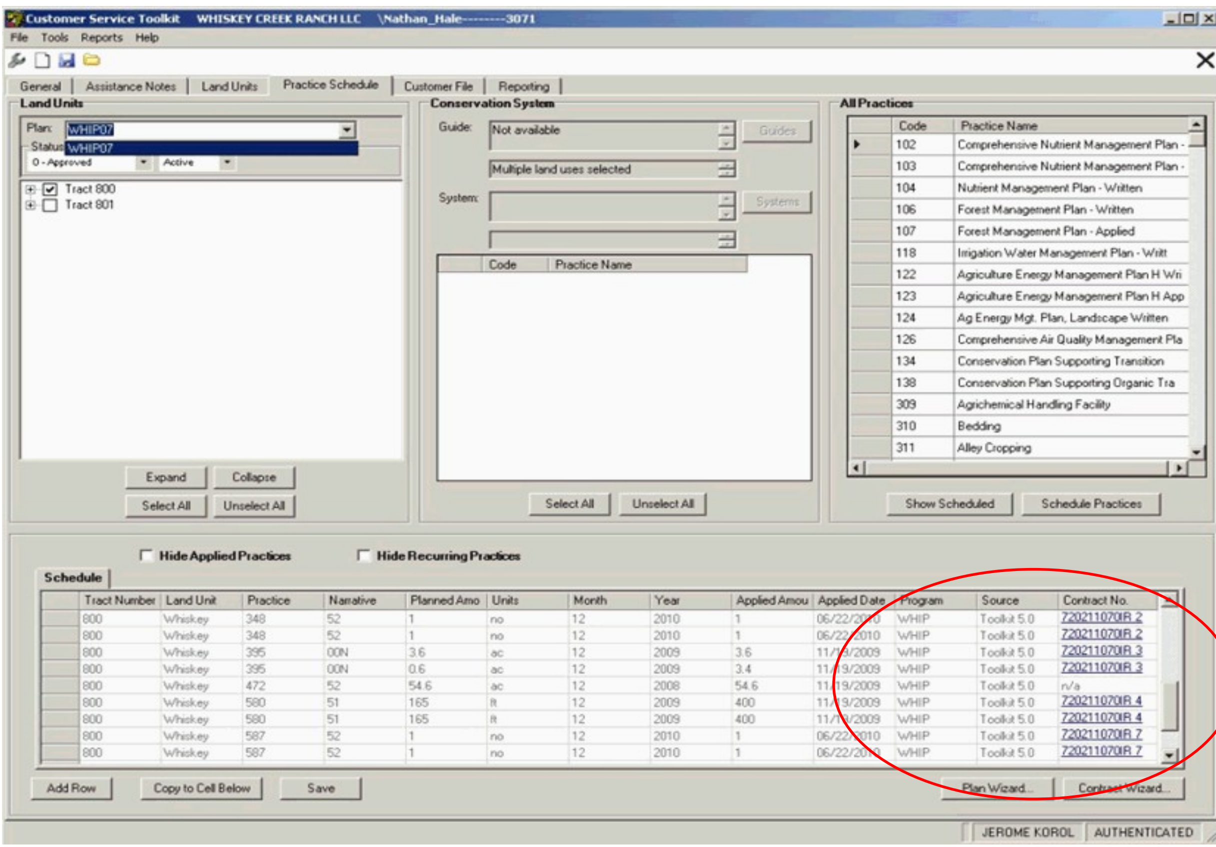
NCP Database Clean-Up:

How do I decide what to do with existing plans when I'm in a customer folder?

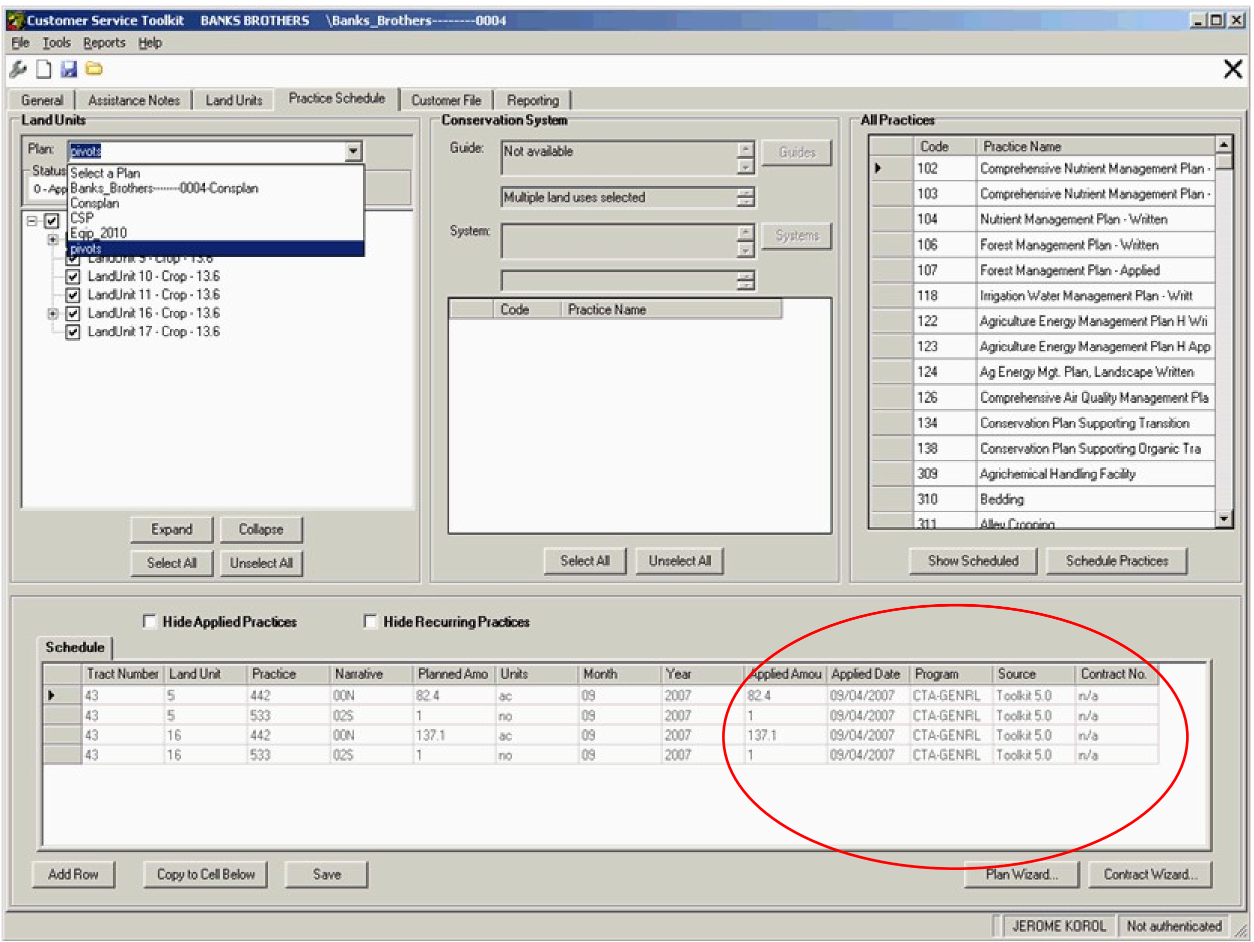
1) **Maintain any plans as is if:**
   - There are no other plans in the folder
   - It is a CSP plan.
   - It is linked to an active contract.
   - A separate CRP plan should be maintained as is, if still associated with an active contract. Any future CRP practices associated with contracts should be added to the Masterplan.



This plan should be maintained as is. There is an active contract associated with this plan, and not all practices have been applied and reported as complete.

2) <u>Archive</u> any plans if:

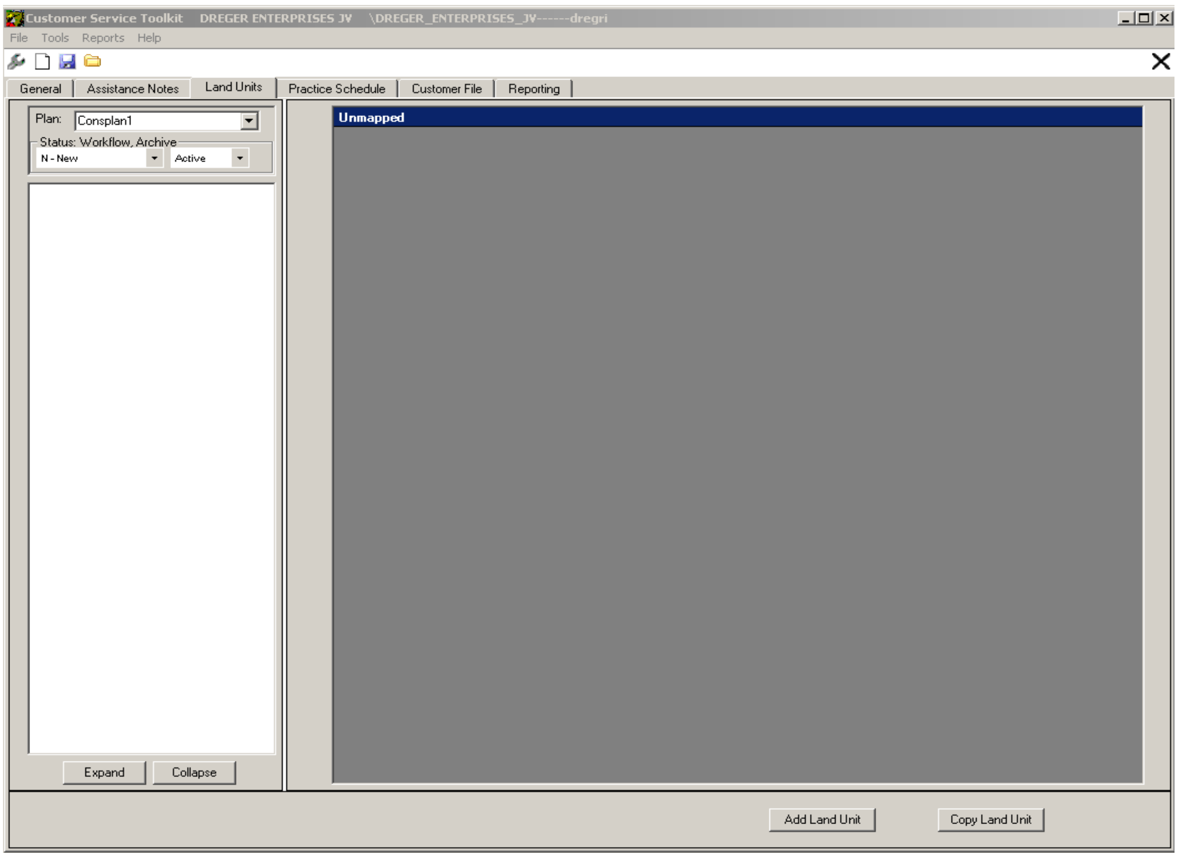
- There is no expectation that the plan will be implemented (no planned practices applied)
- A non-selected alternative
- Plan created prior to 2005 if it has not been updated since then
- If it is a “Completed” plan
- Do not archive if tied to an active contract!



This plan can be set to “Completed” and status set to “Archive.” All planned practices have been applied and reported, and no active contract exists.

3) <u>Delete</u> any plans if:

- It is a duplicate plan
- The Land Units tab is blank. When the screen is blank, where the tracts and fields would normally be listed, you can delete the plan, **<u>unless</u> the workload Status is New.** Double-check that it is not just a new plan!
- <u>NEVER</u> delete a plan tied to an active contract!



This plan was probably started as a map that was never attributed. There is no practice schedule because you need tracts/fields for the practice schedule. This plan was abandoned – it can be deleted. Be sure to read the pop-up messages and answer appropriately when deleting. It is easy to accidentally delete the folder when you want to delete the plan.

<u>EXAMPLE: A Customer Folder Contains:</u>

- **Consplan1 – Contains 2010 EQIP contract and CTA practices**
- **EQIP07 – Active EQIP contract is linked to this plan**
- **WHIPplan02 – Completed WHIP contract that is not linked to ProTracts**
- **Consplan2 – Plan that was started at the same time as the EQIP plan but abandoned.**
- **WHIPnew – New plan started with a few scheduled practices but not linked to ProTracts**

Suggested Clean-up:

- **Make Consplan1 the "Master Plan" and plan all new practices in this practice schedule.**
- **Leave EQIP07 alone and make no changes at this time.**
- **For the completed WHIP plan set the Archive status to "Archived" and make no changes.**
- **Consplan2 can either be deleted or workflow status set to "Non-Selected" and archive status set to "Archived".**
- **WHIPnew – Add practices to master plan and delete this plan. When you revise (add to) the Masterplan, make sure to update the plan approval date.**