USDA

United States Department of Agriculture

January 29, 2016

GENERAL MANUAL (GM)
180 – CPA
AMENDMENT IA19

SUBJECT: CPA – DOCUMENTATION OF CONSERVATION PLANNING DATA AND SIGNATURE REQUIREMENTS

Purpose. To amend Part 409 Conservation Planning Policy, Section 409.5 Documentation of Conservation Planning Data and Signature Requirements.

180-GM Part 409.5A. NRCS employees, and partners on the NRCS network, will document and maintain conservation plan data using agency approved tools and the official planning database, National Planning and Agreements Database (NPAD).

Toolkit is the NRCS's official conservation planning and application documentation business tool. The NRCS copy of the conservation plan and associated documents and worksheets will be maintained in combination of hardcopy and electronically, as appropriate (180-GM Part 409 D). Conservation plan documents may be made available to the customer in electronic format, hardcopy, or both (180-GM Part 409 E).

In an effort to achieve a consistent, quality product using the business tools available, Iowa NRCS is implementing an updated statewide policy for use of Toolkit. This policy includes standard formats for the naming conventions for the customer folder, conservation plan, and the .mxd project file in Toolkit as well as standard symbology for all practices in Iowa.

As NRCS staff services more than one office, it becomes imperative to have a consistent Toolkit planning process. The implementation of common naming conventions for Toolkit and common map symbols for ArcMap must occur for consistency, effectiveness, and improved efficiency for Iowa NRCS. It is expected that every employee that works with Toolkit will fully adhere to this guidance.

Effective Date. Upon receipt.

Contact. If there are questions about this amendment, contact the State Resource Conservationist, at 515/284-4370.

Filing Instructions.

Remove	File Immediately After	Dated
180-GM, IA Amend. 15, March 2008	Title 180, Part 409.5	October 2014

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Attachment

GM

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IA409.5 Documentation of Conservation Planning Data

Customer Folders:

Customer folders will be created and filed by owner name and tract number in Toolkit.

For Individuals, the folder name will use the last name, an underscore; followed by the first name, an underscore; and the middle initial (if applicable). There must not be any spaces or punctuation in the folder name and should look like this “Campbell_Roy_R”. When the identifier is entered, it should be entered as “t” and then the tract number as such “t3204”. Do not use leading zeros in the tract number.

The resulting customer folder name will be:

Customer Name: Campbell_Roy_R
Identifier: t3204

Corporations, trusts, and partnerships will be entered as corporation name, an underscore, and the corporation type. There must not be any spaces or punctuation in the folder name and should look like this “Mickey_Mouse_Irr_Tr”. When the identifier is entered, it should be entered as “t” and then the tract number as such “t505.” Do not use leading zeros in the tract number. The resulting customer folder name will be:

Customer Name: Mickey_Mouse_Irr_Tr
Identifier: t505

When using abbreviations for trust, partnership, corporation, etc.; make sure everyone in the office uses the same abbreviation with underscores between any abbreviations.

If necessary, guidance for program specific customer folders and naming conventions will be included in current year program guidance (ACEP, BCAP, CSP).

Land managed outside of the county:

The Toolkit folder will be created and maintained in the county where the ground is physically located. If land is managed or carried by an FSA county office other than where the land is physically located, the first 3 letters of the FSA county name will be added in front of the tract number (t##) as follows (Story County land managed by Polk County FSA) to assist in identifying the land location:

i.	Customer Toolkit folder (created in Story County)	Mouse_Mickey-----Polt##
ii.	Conservation plan	Consplan-Polt##.xlsx
iii.	MXD file	Consplan-Polt##.mxd

Management of .mxd Files:

Each “Customer Folder” has up to three .mxd files. One of these can be created and named by the Toolkit user. The naming convention for the .mxd file will be the same as for the consplan. When creating this layer, the layer name will be “Consplan” followed by a dash “-”and “t” and then the tract number. The .mxd layer name should look like this:

Consplan-t32.mxd

The other two .mxd files exist in the Toolkit system. These are the default file ToolkitGIS_Template.mxd, and the county specific template file ToolkitGIS_Template_countyname_year.mxd.

The Consplan-t32.mxd file will contain all conservation plan map work for conservation planning and for programs such as CRP and EQIP.

As field office staff work on existing folders, the field offices will "clean up" old .mxd files. This will be done to accomplish the above guidance of only one tract specific .mxd file per tract and name the file per the above naming convention.

Conservation Plan Land Units:

180-GM, Part 409.5, B.(1) - Planning Land Unit (PLU).—A PLU is a unique geographic area, defined by a polygon, that has a common land use and land use modifier and is owned, operated, or managed by the same clients.

All land units are edited and attributed in the Case PLU Layer of the owner's tract folder. Land units in a tract may be merged or split by the user for the purposes of Conservation Planning and do not have to follow the Farm Service Agency CLU layer other than the outer tract boundary. However, FSA field boundaries may be used.

Note: CRP land units will be maintained as separate fields and additional planning information will be included in the current NRCS/FSA Joint Planning Memo.

Note: If subfields are needed for the purposes of conservation planning, fields will be split and renumbered with the parent field plus a letter; field 1 is split and becomes 1A and 1B.

Note: If land units need to be modified for the purposes of a program, guidance will be provided in the current year program bulletin.

Conservation Plan (Consplan) Layer:

Iowa will maintain the concept of one conservation plan (consplan) per tract of land, ***<u>unless</u>*** the following circumstances apply:

Multiple plans should be used in the following situation due to the integration of Conservation Client Gateway (CCG):

- If the decision maker or associated customers are different for the practices in the plan or contract (BCAP, CRP, CSP, EQIP)

Some program specific plans are required to be completed as separate plans, for example:

- TSP plans (CAPs)
- Easement management plans (ACEP)

When creating the consplan layer, the layer name will be “Consplan” followed by a dash “-” and “t” and then the tract number. The layer name should look like:

Consplan-t32

Guidance on program specific plans and naming conventions will be included in current year program guidance (ACEP, BCAP, CRP, CSP, EQIP).

Practice Layers (Points, PolyLines, Polygons):

The practice layers will contain all conservation planning decisions and practice application that are associated with the tract. Any existing layers developed for programs (CRP or EQIP) or other uses will be incorporated into these layers. All planned and applied practices denoted by points, polylines, and polygons will be in the appropriate practice layer.

To provide conservation practice alternatives without using the practice layers, use the resource inventory layers (point, polyline, polygon) until the decision has been made and ready to be recorded and documented.

Conservation Practice Map Symbology:

Along with the common naming conventions, a common set of national map symbols has been developed for use in ArcMap. **The set of national map symbols must be used for all conservation planning and documentation of practice application.**

Previously Applied Practices:

Conservation practices applied prior to the date of the conservation planning activity that are still functioning or are still under a practice maintenance lifespan and were certified as meeting NRCS standards and specifications should be added to the appropriate practice layer at the time the new conservation plan is developed.

Customer Service Toolkit/Conservation Client Gateway Integration:

Data that is recorded in Toolkit is recorded in National Planning and Agreements Database (NPAD). Conservation Client Gateway (CCG) is an approved NRCS Business Tool that reads data stored in NPAD. Conservation planners need to ensure that information entered Toolkit is accurate and maintained for clients to access through CCG.

Toolkit 8 allows customers to be associated at both the folder and plan level. With this change, it is important to understand the relationship between Toolkit 8 and CCG.

Customer Folder Integration:

All clients associated to the customer folder can see the land units.

- Land units in Toolkit “active” (Planned or Locked) status display in CCG
- Land units in Legacy, History, Draft or Sketch status do not display in CCG

Conservation Plan Integration:

All clients associated at the plan level can see the plan if the “Make Plan viewable in Client Gateway” is selected in the Toolkit 8 Plan Approval Tab.

All clients associated to the plan can take action on the plan in CCG by:

- Viewing their existing conservation plan schedules in summary or detailed formats
- Requesting a modification to an existing plan
- Viewing practice planned/applied status and practice information in summary or detailed formats
- Requesting practice information / assistance to help with installation
- Request conservation practice certification
- Viewing plan and practice documents associated with the plan that have been posted to the Document Management System (DMS)
- Signing (eSign or wet sign) a conservation plan document that has been posted to the DMS

Signature Requirements: Refer to 180-GM Part 409.5 F. (1-3) Plan Signatures

(1) The plan is signed by an NRCS-certified conservation planner indicating the plan meets client objectives and all NRCS policy, procedures, and standards. Some federal, state, Tribal, or local program requirements may call for additional signatures. These additional approvals are not required by NRCS, but may be necessary to meet the client’s objectives. Therefore it is the client’s responsibility to obtain these additional signatures.

(2) The plan is signed by the customer indicating acceptance of the conservation system alternative.

(3) The plan may be signed by the conservation district, per NRCS and conservation district policy as specified under mutual, cooperative working, operational, and contribution agreements and in accordance with the confidentiality provisions of section 1619 of the Food, Conservation, and Energy Act of 2008.