NRCS

United States Department of Agriculture

Natural Resources Conservation Service

Conservation Assessment Ranking Tool User's Manual

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For Official Use Only
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USDA

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Revision History

Version	Date	Description
1.0	01/09/2020	Initial version of CART Help
1.01	3/19/2020	Added CSP Reports, CSP Tagging, Override, and other additions and changes.

1 Configuration, Assessment, and Ranking

The configuration, assessment, and ranking information provided in this section is designed to assist conservation planners as they assess site vulnerability, existing conditions, and identify potential resource concerns on land unit(s). Although these actions do not directly rely on planning criteria for resource assessments, they rely on similar inputs to provide thresholds to document whether planning criteria has been achieved, or if additional conservation practices are necessary. The assessment and ranking results are used to support conservation planning for the client. The actions described in this section also capture this information to prioritize programs and report outcomes of NRCS investments in conservation. Look for detailed information in the following sections:

- User Interface
- Roles and Entitlements
- Surveys (Configuration)
- CSP Report
- Ranking Configuration
- Finalizing the Ranking and Submitting it for Selection
- Changing an Assessment Status
- Assessment
- Ranking an Assessment
- Funds Manager

1.1 User Interface

The CONSERVATION ASSESSMENT RANKING TOOL User Interface includes the main components described in this section.

1.1.1 Surveys

Use the **Surveys** menu to search for assessment or ranking **Display Group Templates**. You can add **Display Groups** from the templates found during these searches. You can search for **Display Groups** for the assessment or ranking **Display Group Templates** you find.

From a list of Display Groups, you can copy, view, or edit the **Display Groups** shown in the list.

1.1.2 Rank Tool

While completed assessments are used to identify potential programs and funding pools for the conservation plan. The **Rank Tool** menu selection is used to rank the assessments within each applicable pool.

1.1.3 Assessment

The **Assessment** menu selection can be used to evaluate site vulnerability, potential resource concerns on site, and existing site conditions. An assessment suggests conservation practices for implementation to address the resource concerns.

1.1.4 Help

From the **Help** menu selection, you can navigate to a Wiki containing a file that provides help topics for CART features.

1.1.5 User Menu

This menu selection shows the detailed Roles and Entitlements for the user that is currently logged on. It also contains version information for CART. Use this menu selection to log off.

1.1.6 Accessibility

Accessibility Policy

At the United States Department of Agriculture, we are committed to making all our documents on our World Wide Web servers accessible to everyone. We are continually reviewing our web sites and changing pages to ensure that they meet or exceed the requirements of Section 508 of the Rehabilitation Act of 1973.

Many documents on our web pages are in ASCII or HTML format, generally accessible to people who use screen reading software and to those with other vision or mobility impairments. We typically use Hypertext Markup Language (HTML) to create pages and documents that are accessible to all people, and we follow Section 508 standards in doing so.

We also have many documents in Adobe Acrobat PDF (Portable Document Format) format, and currently this format is not compatible with some screen-reading software. However, there are significant improvements in the accessibility of PDF documents, and Adobe`s accessibility web page (http://access.adobe.com/) has more information about accessibility initiatives and products.

Keyboard Navigation

- Navigate CART with a keyboard by pressing the **Tab** key.
- Each time **Tab** is pressed, the browser focus shifts to the next object in the read order.
- Press **Shift+Tab** to navigate in reverse order.
- When the focus is on a tab:
  - Press the **Left Arrow** to move to and activate the previous tab. (If the focus is on the first tab, the **Left Arrow** moves focus to and activates the last tab.)
  - Press the **Right Arrow** to move to and activate the next tab. (If the focus is on the last tab, the **Right Arrow** moves focus to and activates the first tab.)

Note: *Within the CART user interface, there are **Keyboard navigation instructions** links. Click on a **Keyboard navigation instructions** link to view keyboard navigation information for the current page.*

1.1.7 Browser Support

The Conservation Ranking Assessment Tool (CART) supports Microsoft® Internet Explorer® 11. Other browsers are not currently supported.

1.2 Roles and Entitlements

The following table lists CD roles and their CART-related entitlements.

Role	Entitlement
CD-TA National Business Tools Coordinator	▪ Create/Edit Assessment and Threshold Display Groups ▪ Edit Summary Reports - No Client Data
CD-FA National Business Tools Coordinator	▪ Edit National Template ▪ Edit State Ranking Pools ▪ Edit Plan Assessment ▪ Edit Rank Plan ▪ Recommend Ranked Plans for Contract Applications ▪ Create/Edit Ranking Display Group
CD-FA State Business Tools Coordinator	▪ Edit State Ranking Pools ▪ Edit Plan Assessment ▪ Edit Rank Plan ▪ Recommend Ranked Plans for Contract Applications ▪ Create/Edit Ranking Display Group
Program Support Assistant	▪ Edit Plan Assessment ▪ Edit Rank Plan
Certified Planner	▪ Edit Plan Assessment ▪ Edit Assessment Lock Status ▪ Edit Rank Plan
Planner	▪ Edit Plan Assessment ▪ Edit Rank Plan
Designated Conservationist	▪ Edit Plan Assessment ▪ Edit Assessment Lock Status ▪ Edit Rank Plan ▪ Approve CPA52
CD Tech Support	▪ Edit Plan Assessment ▪ Edit Rank Plan
Easement State Program User	▪ Edit Plan Assessment ▪ Edit Assessment Lock Status ▪ Edit Rank Plan
Easement State Program Manager	▪ Edit State Ranking Pools ▪ Edit Plan Assessment ▪ Edit Rank Plan ▪ Recommend Ranked Plans for Contract Applications ▪ Create/Edit Ranking Display Group
Easement National Program Manager	▪ Edit National Template ▪ Edit State Ranking Pools ▪ Edit Plan Assessment ▪ Edit Rank Plan ▪ Recommend Ranked Plans for Contract Applications ▪ Create/Edit Ranking Display Group

1.3 Surveys (Configuration)

The **Surveys** menu lets users search for **Assessment** or **Ranking Display Group** templates. Users can create **Display Groups** from existing templates or create new **Display Group** templates.

1.3.1 Searching for Display Group Templates

You can search for either ranking or assessment templates from the **Surveys** menu.

To search for assessment Display Group Templates, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **assessment** in the **Template Name** field, then click **SEARCH**.

> **Note:** *Searches shown in this section use partial text recognition, so entering a partial word, such as assess, for the search can be helpful.*

A list of templates appears in the **Display Group Templates** table.

To search for ranking Display Group Templates, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **ranking** in the **Template Name** field, then click **SEARCH**.

> **Note:** *Searches shown in this section use partial text recognition, so entering a partial word, such as rank, for the search can be helpful.*

A list of templates appears in the **Display Group Templates** table.

To search for threshold Display Group Templates, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **threshold** in the **Template Name** field, then click **SEARCH**.

> **Note:** *Searches shown in this section use partial text recognition, so entering a partial word, such as rank, for the search can be helpful.*

A list of templates appears in the **Display Group Templates** table.

1.3.2 Configuring Tags for a Display Group

Use tags as a method of assigning meaning to an attribute of the Display Group. Tags can be applied at any level of the Display Group, such as Survey, Section, Question, or Answer Choice. Specific instructions about how to apply each tag can be found in this document until the UI provides more guidance.

Users that have the role for creating a Display Group can assign tags within that Display Group. For a list of roles and entitlements for Display Groups, see Roles and Entitlements.

1.3.2.1 Tagging Display Group Questions with CSP Report Tags

The **CSP Report** tags should be applied to the survey questions that pertain to the Conservation Stewardship Program. The answers to this these tagged questions determine if the resource concerns on the land units have been adequately addressed by the practice applied to or planned for the land units.

The following questions are currently tagged with a CSP Report tag.

1. Crop Group (Dry Climate – Geospatial)
2. Crop Group (Dry Climate – User Answered)
3. Crop Group (Humid Climate – Geospatial)
4. Crop Group (Humid Climate – User Answered)
5. Range Group

6. Pasture Group
7. Forest Group

It is recommended that users study the information in this section and reference it while creating tags for the CSP Report.

A single question in a **Land Use** survey must have only one answer for a PLU. The user must configure a question with **Allow Multiple Answers disabled** when configuring questions for the **Land Use** survey section.

During the following configuration steps, it is possible for the user to tag multiple questions with the **CSP Report** tag per land use. These multiple tagged questions could result in more than one identical answer. When multiple questions get tagged, it has the following effect in the **CSP Report**:

- If the answer text is identical (the answers match character-for-character) across two or more questions, the results for the resource concern categories with any of the identical answers are combined into a single column within the **CSP Report**.
- If the answer text is identical (the answers match character-for-character) across two or more questions, the answer text shows up as a single row in the table that lists **Land Units**. The **Acres** for all the land units with that answer is summed up beneath the same answer.
- Where the answer text is not identical, these answers show up as separate columns within the **CSP Report.**

The following steps explain how to assign the CSP Report tag to an assessment Display Group from the Surveys menu:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Select **Assessment** using the **Display Group Type** drop-down menu.

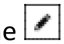
   > Note: *You can search for assessment, ranking, special environmental concerns, or threshold Display Group templates from the Surveys menu.*

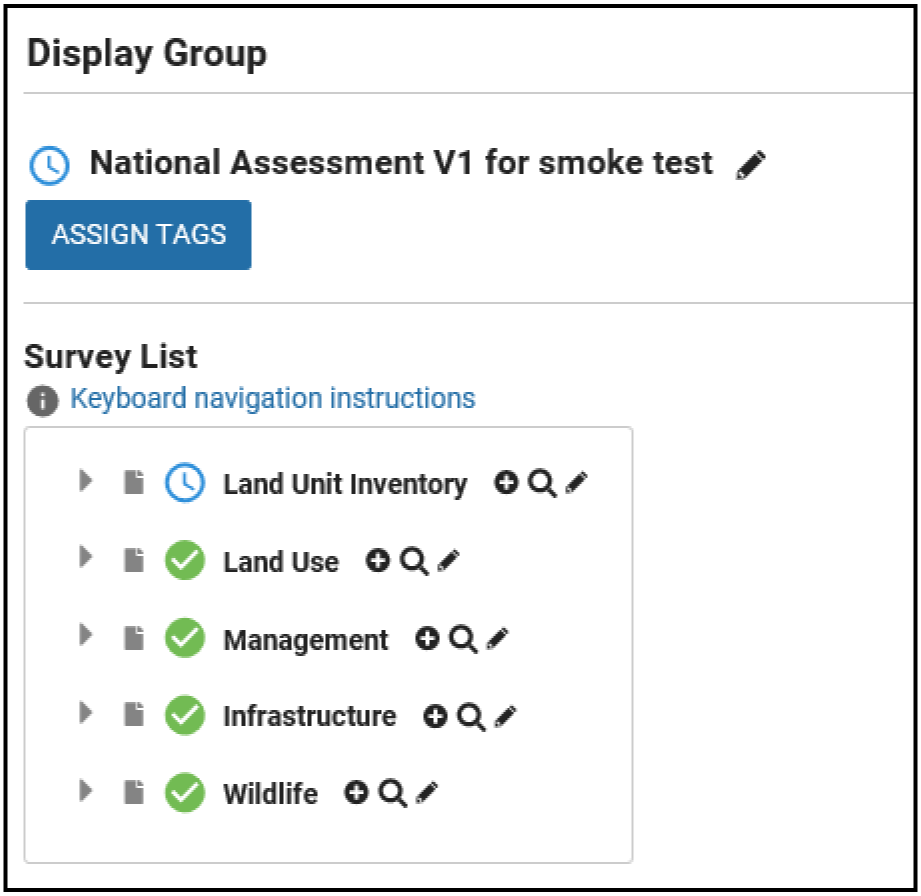
3. Optionally type **assessment** in the **Template Name** field.

   > Note: *Searches shown in this section use partial text recognition, so entering a partial word, such as assess, for the search can be helpful.*

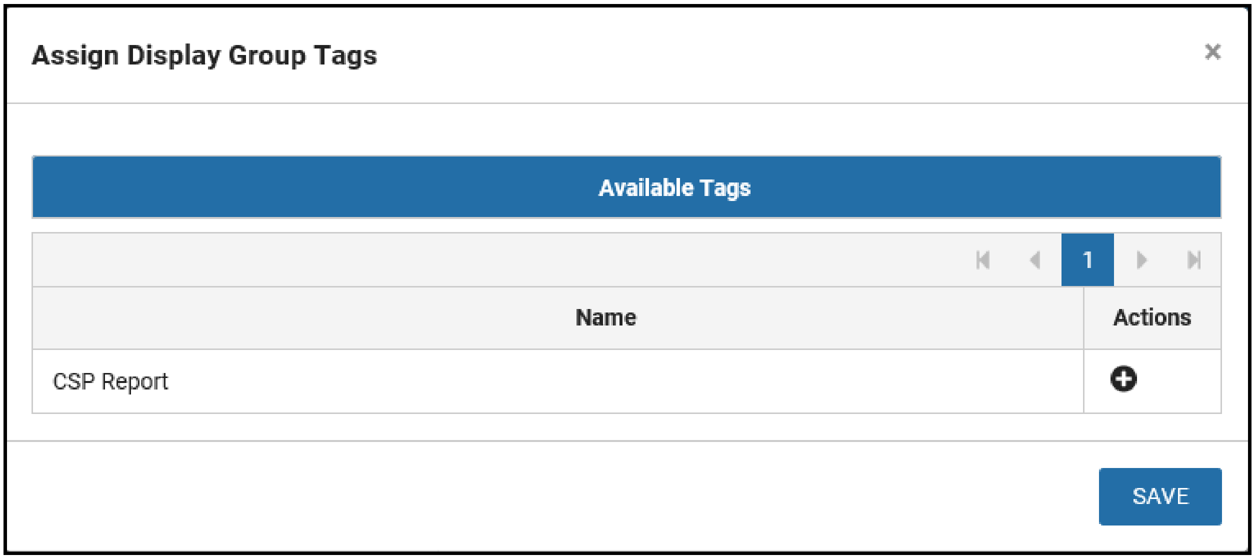
4. Click **SEARCH**. A list of templates appears in the **Display Group Templates** table.
5. Select a template, then under **Actions** in the far-right column of the assessment template.
6. On the **Display Group Template Search** screen, under **Display Group Name**, type in **assess**.
7. Optionally use the selection criteria to set the **Display Group Status** or data selections to narrow your search. For example, if the user wants to search for active display groups, select **Active** using the **Display Group Status** drop-down menu.
8. Click **SEARCH**. A list of Display Groups displays in the **Display Group Template Search** table.
9. The user can optionally use the following search aids to narrow the search for the Display Group of interest:
   - Sort any of the **Display Groups** column contents by clicking the column heading.

- Filter the **Display Groups** column contents by entering text in the fields at the top of each table column, beneath any column heading.

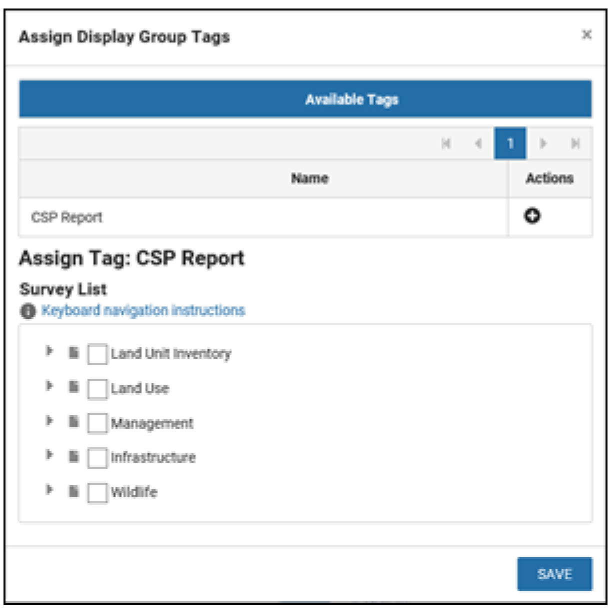
10. To load the **Display Group** to which the user wants to apply the CSP tag, the user clicks the  in the **Actions** column next to the assessment to be tagged.
11. Click **ASSIGN TAGS**.



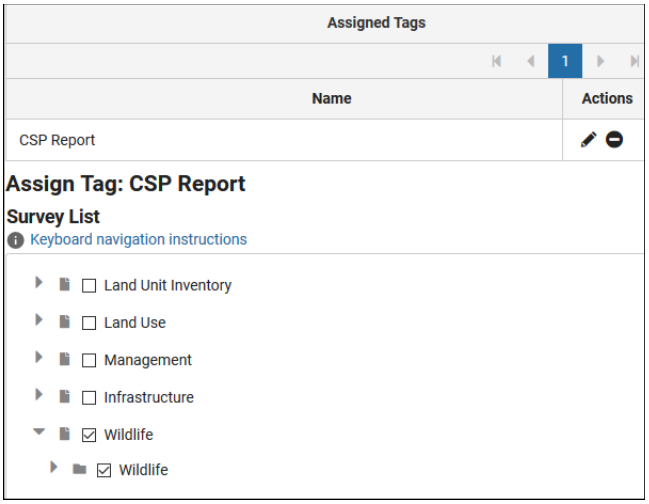
12. The **Assign Display Group Tags** dialog box displays.



13. If you are configuring a **CSP Report** tag for a display group, click for the **CSP Report** tag, which is beneath the **Actions** menu in the **Available Tags** list.



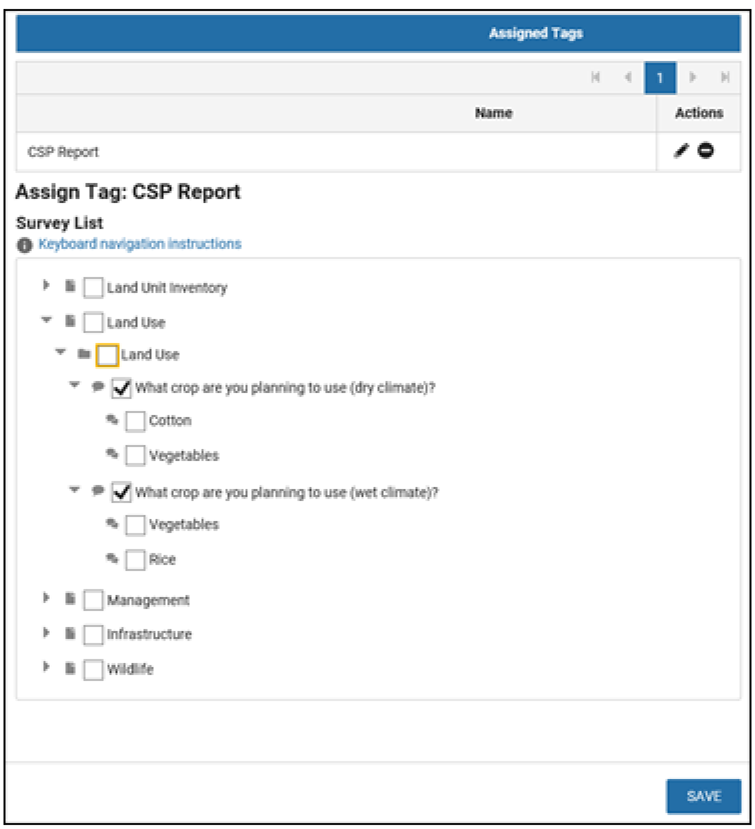
14. If you are editing a **CSP Report** tag for a display group, click for the **CSP Report** tag, which is beneath the **Actions** menu in the **Assigned Tags** list.



15. Select the checkbox for the item(s) in the **Survey List** for which the tag will be assigned using the example below. For the **CSP Report** tag, the tag must be applied at the Question level of the expanded **Survey List**:

For the CSP Report tag, the tag must be configured using the following steps as an example:

a. Expand the **Land Use Survey List**.



b. In this example, the user expands the **Land Use** section that contains the questions being tagged.
c. Select the checkbox for each question to be tagged.
d. Click **SAVE**.

The **CSP Report** can now use the **CSP Report** tags configured here to identify the appropriate data to include in the report.

1.3.3 Creating Assessment Display Groups

Users must have specific roles to configure the **Display Group** section of an **Assessment Ranking Pool** with assessment questions for an **Assessment Ranking Pool** These questions can include geospatial questions that can be automatically answered by referencing data in a **Practice Schedule** against data in published geodata.

When configuring the **Survey List** questions for a **Display Group**, consider the following information:

- A green checkmark appears on the left side of the navigation menu to show that validation is complete for a section.
- If a section is not complete, look for a clock symbol next to the section. This symbol indicates a **DRAFT** or **IN PROGRESS** status.
- To add a survey question for a section, click the plus sign next to the question type.
- Any time you save a configured question, the question section might close. Click next to the question you were editing to reopen it.
- When allocating points, click Actions for the **Program Points** for the selected **Available Choice**, then enter the points the user wants allocated for this **Available Choice**.
- To open any of the **Available Conditions**, click the next to each one in which the user is interested.

To create an Assessment Display Group from an Assessment Display Group template, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **assessment** in the **Template Name** field, then click **SEARCH**. A list of one or more **Assessment Display Group Templates** appears in the **Display Group Templates** table.
3. Click on the right side of the **Display Group Template** for which the user wants to add the **Display Group**.
4. Enter a **Display Group Name** in the **Add Display Group** entry screen, then click **SAVE**.

1.3.3.1 Configuring Land Unit Inventory Questions

Complete the following steps to create the Land Unit Inventory survey questions for the new Display Group.

1. Click the plus sign next to **Land Unit Inventory** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.

3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. Type a **Choices Group Name**.
   d. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
   e. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selected Allocate Points, complete the following steps:

1. Select the first answer choice.
2. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
3. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.

3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

> **Note:** *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. Type a **Choices Group Name**.
6. To configure the answer choices, click **Choices** , then type the answer choice. Complete this step for every possible answer for this question.
7. For each answer, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
8. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
   a. Expand the **Layer Search**.
   b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
   c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.

d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.

9. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
10. Set the **Require Answer** slider to the **On** position.
11. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
3. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

> **Note:** *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.

3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
   a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
   b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
3. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.

4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.3.3.2 Configuring Land Use Questions

Complete the following steps to create the Land Use survey questions for the new Display Group.

1. Click the plus sign next to **Land Use** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
    a. Set the **Require Answer** slider to the **On** position if the question must be answered.
    b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
    c. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
    d. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
    e. Type a **Choices Group Name**.
    f. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
    g. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
    a. Set the **Require Answer** slider to the **On** position if the question must be answered.
    b. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** setting to **ANY**.
    c. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** setting to **ALL**.
    d. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first answer choice.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.

2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices** , then type the answer choice. Complete this step for every possible answer for this question.
9. For each answer, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.
    b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
    c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
    d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
    e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
    f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
    g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
    h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
    i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.
11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.

3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
    a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
    b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.

2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.3.3.3 Configuring Management Questions

Complete the following steps to create the Management survey questions for the new Display Group.

1. Click the plus sign next to **Management** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
    a. Set the **Require Answer** slider to the **On** position if the question must be answered.
    b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
    c. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
    d. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
    e. Type a **Choices Group Name**.
    f. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
    g. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
    a. Set the **Require Answer** slider to the **On** position if the question must be answered.
    b. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** setting to **ANY**.
    c. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** setting to **ALL**.
    d. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first answer choice.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices** , then type the answer choice. Complete this step for every possible answer for this question.
9. For each answer, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.

10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.
    b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
    c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
    d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
    e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
    f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
    g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
    h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
    i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.
11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
    a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
    b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.

5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.3.3.4 Configuring Infrastructure Questions

Complete the following steps to create the Infrastructure survey questions for the new Display Group.

1. Click the plus sign next to **Infrastructure** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
   d. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
   e. Type a **Choices Group Name**.
   f. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.

   g. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** setting to **ANY**.
   c. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** setting to **ALL**.
   d. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first answer choice.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices**, then type the answer choice. Complete this step for every possible answer for this question.
9. For each answer, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.
    b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
    c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
    d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
    e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
    f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
    g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
    h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.

    i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.

11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
   a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
   b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.3.3.5 Configuring Wildlife Questions

Complete the following steps to create the Wildlife survey questions for the new Display Group.

1. Click the plus sign next to **Wildlife** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
   d. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
   e. Type a **Choices Group Name**.
   f. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
   g. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** setting to **ANY**.
   c. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** setting to **ALL**.
   d. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.

2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first answer choice.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.

4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices** , then type the answer choice. Complete this step for every possible answer for this question.
9. For each answer, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.
    b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
    c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
    d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
    e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
    f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
    g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
    h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
    i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.
11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**

5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
   a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
   b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.

4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.3.3.6 Configuring Special Environmental Concern Questions

Complete the following steps to create the Special Environmental Concerns survey questions for the new Display Group.

1. Click the plus sign next to **Special Environmental Concerns** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.

3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
    a. Set the **Require Answer** slider to the **On** position if the question must be answered.
    b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
    c. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
    d. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
    e. Type a **Choices Group Name**.
    f. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
    g. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
    a. Set the **Require Answer** slider to the **On** position if the question must be answered.
    b. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** setting to **ANY**.
    c. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** setting to **ALL**.
    d. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first answer choice.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.

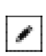
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices** , then type the answer choice. Complete this step for every possible answer for this question.
9. For each answer, click  on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.

b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.

11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
   a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
   b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.3.4 Editing Assessment Display Groups

To edit an Assessment Display Group, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **assessment** in the **Template Name** field, then click **SEARCH**. A list of one or more **Assessment Display Group Templates** appears in the **Display Group Templates** table.
3. Click the search icon for the **Display Group Template** the user wants to use to search for the **Display Group** the user wants to edit.
4. Enter a version of the name of the **Display Group** the user wants to edit (as a filter), then click **SEARCH**. A list of **Display Groups** should appear.
5. Click the edit symbol in the **Actions** column next to the **Display Group** the user wants to edit.
6. Configure the **Land Unit Inventory Questions** by following the steps shown in Configuring Land Unit Inventory Questions.
7. Configure the **Land Use Questions** by following the steps shown in Configuring Land Use Questions.
8. Configure the **Management Questions** by following the steps shown in Configuring Management Questions.
9. Configure the **Infrastructure Questions** by following the steps shown in Configuring Infrastructure Questions.
10. Configure the **Wildlife Questions** by following the steps shown in Configuring Wildlife Questions.
11. Configure the **Special Environmental Concern Questions** by following the steps shown in Configuring Special Environmental Concern Questions.

1.3.5 Publishing an Assessment Display Group

Publishing an Assessment Display Group makes it available for other users. There can only be one active Assessment Display Group for each Assessment Display Group template.

After completing the desired configuration steps in Creating Assessment Display Groups or Editing Assessment Display Groups, the user can click **PUBLISH** to publish the Assessment Display Group that the user created or changed.

CAUTION: ***When publishing an Assessment Display Group, the current active Assessment Display Group for the Display Group template from which it was created becomes inactive.***

1.3.6 Creating Ranking Pool Display Groups

Users must have specific roles to create and configure the **Display Group** section of a **Ranking Pool** with ranking questions for a **Ranking Pool**. These questions can include geospatial questions that can be automatically answered by referencing data in a **Practice Schedule** against data in published geodata.

To create a Ranking Pool Display Group from a Ranking Display Group template, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **ranking** in the **Template Name** field, then click **SEARCH**. A list of one or more **Ranking Display Group Templates** appears in the **Display Group Templates** table.
3. Click ⊕ on the right side of the **Display Group Template** for which the user wants to create the **Display Group**.
4. Enter a **Display Group Name** in the **Add Display Group** entry screen,
5. Complete the following steps to assign a **Ranking Pool** to the new **Display Group**.

   Note: *A ranking pool must be created and in draft status to link to a display group.*

   a. Select a **State**.
   b. Select a **Program**.
   c. Click **SEARCH**.
   d. Click the plus sign for the **Ranking Pool** the user wants to assign to the new **Display Group**.
   e. Click **SAVE** to save the work, and the new **Display Group** opens.
6. Configure the **Applicability Questions** by following the steps shown in Configuring Applicability Questions.
7. Configure the **Category Questions** by following the steps shown in Configuring Category Questions.
8. Configure the **Program Questions** by following the steps shown in Configuring Program Questions.
9. Configure the **Resource Questions** by following the steps shown in Configuring Resource Questions.
10. Publish this **Display Group** by following the steps shown in Publishing the Display Group.

1.3.7 Editing Ranking Pool Display Groups

Users must have specific roles to configure the **Display Group** section of a **Ranking Pool**. When configuring a **Display Group** section, the qualified user can add the ranking questions for a **Ranking Pool**.

> **Note:** *Users cannot add ranking questions if a display group has been published or if the ranking pool is **Active**.*

To configure the Display Group section of a Ranking Pool, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **ranking** in the **Template Name** field, then click **SEARCH**. A list of one or more **Ranking Display Group Templates** appears in the **Display Group Templates** table.
3. Click the search icon for the **Display Group Template** the user wants to use to search for the **Display Group** the user wants to edit.
4. Enter a version of the name of the **Display Group** the user wants to edit (as a filter), then click **SEARCH**. A list of **Display Groups** should appear.
5. Click the edit symbol in the **Actions** column next to the **Display Group** the user wants to edit.
6. Configure the **Applicability Questions** by following the steps shown in Configuring Applicability Questions.
7. Configure the **Category Questions** by following the steps shown in Configuring Category Questions.
8. Configure the **Program Questions** by following the steps shown in Configuring Program Questions.
9. Configure the **Resource Questions** by following the steps shown in Configuring Resource Questions.
10. Publish this **Display Group** by following the steps shown in Publishing the Display Group.

1.3.8 Managing Threshold Display Groups

Thresholds are used to document whether planning criteria have been achieved, or if additional conservation practices are necessary to meet the threshold. This achievement is based on the accumulation of point (numerical) values associated with these conservation practices.

A Display Group is used to categorize assessments into groups.

To search for threshold Display Group Templates, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **threshold** in the **Template Name** field, then click **SEARCH**.

> **Note:** *Searches shown in this section use partial text recognition when you enter a minimum of four characters. Entering a partial word, such as thresh, for the search can be helpful.*

A list of templates appears in the **Display Group Templates** table.

Users must have specific roles to create and configure the **Display Group** section of a **Threshold** with questions. These questions can include geospatial questions that can be automatically answered by referencing data in a **Practice Schedule** against data in published geodata.

To create a Threshold Display Group from a Threshold Display Group Template, complete the following steps:

1. Click **Surveys** from the **CONSERVATION ASSESSMENT RANKING TOOL** landing page.
2. Type **threshold** in the **Template Name** field, then click **SEARCH**.

> **Note:** *Searches shown in this section use partial text recognition, so entering a partial word, such as thresh, for the search can be helpful.*

A list of templates appears in the **Display Group Templates** table.

3. Click on the right side of the **Display Group Template** from which the user wants to create the **Display Group**.
4. Enter a **Display Group Name** in the **Add Display Group** entry screen, then click **SAVE**. A **Survey List** appears.

   When configuring the **Survey List** questions for a **Display Group**, consider the following information:

- A green checkmark appears on the left side of the navigation menu to show that validation is complete for a section.
- If a section is not complete, look for a clock symbol next to the section. This symbol indicates a **DRAFT** or **IN PROGRESS** status.
- To add a survey question for a section, click the plus sign next to the question type.
- Any time you save a configured question, the question section might close. Click next to the question you were editing to reopen it.
- When allocating points, click for the **Program Points** for the selected **Available Choice**, then enter the points the user wants allocated for this **Available Choice**.
- To open any of the **Available Resource Concerns**, click the next to each one in which the user is interested.

1.3.8.1 Configuring Standard Threshold Points Questions

Complete the following steps to create the Standard Threshold Points survey questions for the new Display Group.

1. Click the plus sign next to **Standard Threshold Points** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.

6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. Type a **Choices Group Name**.
   d. To configure the answer choices, click the plus sign, then type the **Choice Text** and the optional **Choice Hover Text**. Complete this step for every possible answer for this question.
   e. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selected Allocate Points, complete the following steps:

1. After the user sets the **Allocate Points** slider to the **On** position, select the first answer choice. A list of **Available Resource Concerns** opens.
2. For each available resource concern to which you want to allocate points, do the following:
   a. Expand the resource concern.
   b. Click the plus sign to select a resource concern to add to the allocated points, then enter the points the user wants allocated for this answer choice.
3. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
4. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the **Available Conditions** category in which the user is interested.

3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.

   > **Note:** *If a plus sign does not appear next to the desired qualifying answer, the user is not permitted to create a condition for this question.*

4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

   > **Note:** *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **ADD**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. Type a **Choices Group Name**.
6. To configure the answer choices, click the plus sign, then type the **Choice Text** and the optional **Choice Hover Text**. Complete this step for every possible answer for this question.
7. For each choice, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
8. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
   a. Expand the **Layer Search**.
   b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
   c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.

   d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
   e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
   f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
   g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
   h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
   i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.

9. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
10. Set the **Require Answer** slider to the **On** position.
11. Select the **Points** tab.
12. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. After the user sets the **Allocate Points** slider to the **On** position, select the first answer choice. A list of **Available Resource Concerns** opens.
2. For each available resource concern to which you want to allocate points, do the following:
   a. Expand the resource concern.
   b. Click the plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
   c. Click the plus sign for **Allocated Point** category to which you want to allocate points, then enter the points.
3. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
4. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.

   > **Note:** *If a plus sign does not appear next to the desired qualifying answer, the user is not permitted to create a condition for this question.*

4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

> **Note:** *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **ADD**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
    a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
    b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.
4. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. After the user sets the **Allocate Points** slider to the **On** position, select the first answer choice. A list of **Available Resource Concerns** opens.
2. For each available resource concern to which you want to allocate points, do the following:
    a. Expand the resource concern.
    b. Click the plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
4. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.

   Note: *If a plus sign does not appear next to the desired qualifying answer, the user is not permitted to create a condition for this question.*

4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

   Note: *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

1.3.8.2 Configuring Dynamic Threshold Points Questions

Complete the following steps to create the Dynamic Threshold Points survey questions for the new Display Group.

1. Click the plus sign next to **Dynamic Threshold Points** to add a new section.
2. In the **Add Section** dialog box, enter the section name, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. Type a **Choices Group Name**.
   d. To configure the answer choices, click the plus sign, then type the **Choice Text** and the optional **Choice Hover Text**. Complete this step for every possible answer for this question.
   e. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selected Allocate Points, complete the following steps:

1. After the user sets the **Allocate Points** slider to the **On** position, select the first answer choice. A list of **Available Resource Concerns** opens.
2. For each available resource concern to which you want to allocate points, do the following:
   a. Expand the resource concern.
   b. Click the plus sign to select a resource concern to add to the allocated points, then enter the points the user wants allocated for this answer choice.
3. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
4. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the **Available Conditions** category in which the user is interested.

3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.

> **Note:** *If a plus sign does not appear next to the desired qualifying answer, the user is not permitted to create a condition for this question.*

4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

> **Note:** *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **ADD**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. Type a **Choices Group Name**.
6. To configure the answer choices, click the plus sign, then type the **Choice Text** and the optional **Choice Hover Text**. Complete this step for every possible answer for this question.
7. For each choice, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
8. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
   a. Expand the **Layer Search**.
   b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
   c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.

   d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
   e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
   f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
   g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
   h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
   i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.

9. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
10. Set the **Require Answer** slider to the **On** position.
11. Select the **Points** tab.
12. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. After the user sets the **Allocate Points** slider to the **On** position select the first answer choice. A list of **Available Resource Concerns** opens.
2. For each available resource concern to which you want to allocate points, do the following:
   a. Expand the resource concern.
   b. Click the plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
   c. Click the plus sign for **Allocated Point** category to which you want to allocate points, then enter the points.
3. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
4. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.

   > **Note:** *If a plus sign does not appear next to the desired qualifying answer, the user is not permitted to create a condition for this question.*

4. Check the table that appears at the top to make sure the desired condition was configured.

5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

> **Note:** *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **ADD**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
   a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
   b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.
4. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. After the user sets the **Allocate Points** slider to the **On** position, select the first answer choice. A list of **Available Resource Concerns** opens.
2. For each available resource concern to which you want to allocate points, do the following:
   a. Expand the resource concern.
   b. Click the plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
4. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.

   Note: *If a plus sign does not appear next to the desired qualifying answer, the user is not permitted to create a condition for this question.*

4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

   Note: *Adding conditions using this step adds further restrictions to the display group. Every condition the user adds in this step must be met for the child question to appear.*

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

1.3.8.3 Publishing a Threshold Display Group

Publishing a Threshold Display Group makes it available for other users. There can only be one active Threshold Display Group for each Display Group template.

After completing the desired configuration steps in the Configuring Standard Threshold Points Questions and Configuring Dynamic Threshold Points Questions, the user can click **PUBLISH** to publish the newly created Threshold Display Group.

CAUTION: ***When publishing a Threshold Display Group, the current active Threshold Display Group for the Display Group template from which it was created becomes inactive.***

1.4 CSP Report

The CSP report is a resource concern evaluation summary of the current and future conservation stewardship a client is implementing for their operation. A minimum level of current conservation stewardship is required to be eligible for CSP. The report illustrates whether that minimum level is met. Some financial payments to the client are also based on their current conservation stewardship.

The two types of CSP reports are Classic and Renewal. After a customer completes their first contract, they are allowed to apply for a renewal. In order to follow program renewal policy, the CSP Renewal Report requires answering different summary questions than the CSP Classic Report.

Access the CSP Report

1. On the Assessment Summary page of a completed assessment, click on either **CSP CLASSIC REPORT** or **CSP RENEWAL REPORT**.

   > **Note:** *The links are enabled only when all assessment steps are complete for the land units included in the assessment.*

2. An HTML version of the report opens in a new tab. The report consists of a header, list of land units, land use grid, and a list of summary questions:

Report Contents	Description
Report Header	USDA logo, report title, client name, case name, assessment name, date the report was generated
Assessed Tract/ Land Units	Displays the Tract/Land Units and the sum of acres of the PLU's against each answer
Land Use Grid	Displays the **Met/Not Met** rollup information per resource concern category and selected answer. Categories are only **Met** if all resource concern components in the same category meet their thresholds for that category. If one, or more, resource concerns does not meet the threshold in the same category, that category is **Not Met**.
Time of Application	Acceptable Values: ▪ **Not Met** – value of RC category is less than **Threshold** value ▪ **Met** – value of RC category is equal to, or greater than, **Threshold** value The value for the RC category is derived by rolling up the values for the individual RC components. If any resource concern component is **Not Met** for the **Existing Total** for that category, the **Time of Application** column displays **Not Met**.
End of Contract	Acceptable Values: ▪ **Not Met** – value of RC category is less than **Threshold** value ▪ **Met** – RC category was met at **Time of Application** and value is still the same at **End of Contract** ▪ **Exceeds** – RC category was met at **Time of Application** and value is still greater at **End of Contract** The value for the RC category is derived by rolling up the values for the individual RC components. If any resource component is **Not Met** for the **Planned Total** for that category, the **End of Contract** column displays **Not Met**. If at least one resource concern component exceeds and the rest of the components are met for the **Planned Total** for that category, the **End of Contract** column displays **Exceeds**.
Summary Questions	Questions for every land use that require answers from the planner based on the information in the land use grid

Edit the CSP Report

1. From the HTML version of the report, click the **EDIT** button if you wish to make changes to the editable sections of the report, such as **State PRC**, **Totals: State PRC RC Categories,** and **Totals: Non-State PRC RC Categories.**

   a. The **State PRC** column in each of the land use matrices displays check boxes.

   b. The **Totals: State PRC RC Categories** and **Totals: Non-State PRC RC Categories** rows accept only integer values (zeros included). The maximum value of the integer should be less than, or equal to, the number of RC categories listed in the grid.

2. When editing is complete, click **SAVE CHANGES**.
3. After changes are saved, the report is downloaded in PDF format with an “X” if the **State PRC** box was checked. Otherwise, the column will be blank. The **Totals: State PRC RC Categories** and **Totals: Non-State PRC RC Categories** rows will display any values that were entered; if none were input, the rows will display zero.

   Note: *Once the report is saved or downloaded to PDF, the HTML report remains open in edit mode with the values that were input and saved.*

Export the CSP Report to PDF

1. To export the file as a PDF, without editing the file, click **EXPORT TO PDF**. Click **Open** to launch the file in a PDF viewer. Click **Save,** or **Save As,** to save the file to a location of your choice in PDF format**.**

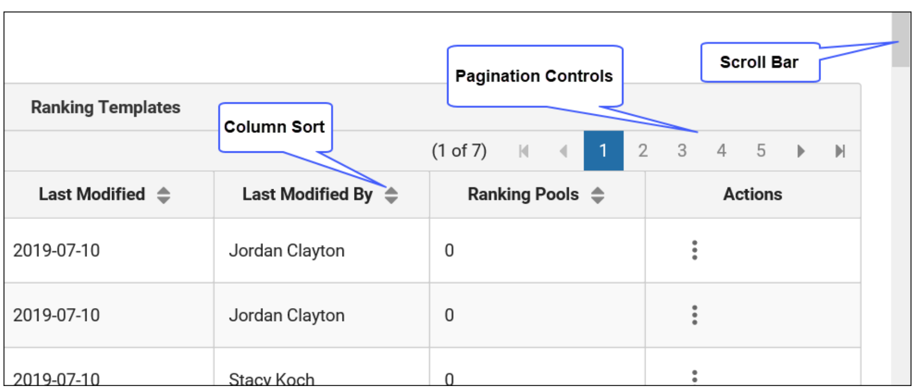
1.5 Ranking Configuration

Practice schedules are evaluated against each other during a ranking process. This ranking process involves identifying the applicable ranking pool for an assessment, then ranking that assessment against other like assessments.

1.5.1 View National Ranking Templates

To view a list of existing ranking templates, do the following:

1. From the main toolbar, click **Rank Tool > Ranking Templates** or select **Ranking Templates** from the **Welcome** page. The **Ranking Templates** window is displayed.
2. Use the scroll bar, pagination controls, and column sort buttons to locate the appropriate ranking template.



3. To view a template, from the associated **Actions** menu, select **View Template**. The ranking template is presented.

   For a given template (depending on its status and the user’s role), the **Actions** menu may include the following options:

- **View Template**—view the associated template
- **Edit Template**—edit the associated template
- **Copy Template**—copy the associated template to save as a new template
- **Delete Template**—delete the associated template
- **Add a Pool for Template**—add a ranking pool for the associated template

Select the appropriate item for the action to be performed.

1.5.2 Create New National Ranking Templates

The roles available to create national ranking templates are CD-FA National Business Tools Coordinator and Easement National Program Manager.

To create a new ranking template, do the following:

1. From the main toolbar, click **Rank Tool > Ranking Templates** or select **Ranking Templates** from the **Welcome** page.
2. On the **Ranking Templates** page, click **ADD NEW TEMPLATE**.
3. On the **New Template** page, in the **Name** field, enter a name for the template.
4. From the **Program** drop-down list select the appropriate program.

   To save the changes to finish working through the template pages later, in the **Status** drop-down list, select **Draft**, and then click the **SAVE** button. The changes are saved, and the template is given a status of "Draft". Only after all required pages are completed can the user select **Active** from the **Status** drop-down list and save the template as an active template.
5. Select the checkboxes associated with all land uses and modifiers that apply. Modifiers use an 'and' logic and must be planned with the associated modifier to be applicable for the associated ranking pools. For example, click the **Crop** checkbox, and then, under **Modifiers for Crop**, select the checkboxes associated with **Grazed** and **Organic**. Continue to select all land uses and modifiers, as appropriate.

   After selecting the first checkbox (for example, **Crop**), the circle beside **Land Uses** changes to a green checkmark.
6. From the item list on the left side of the page, click **Resource Concern Categories** (or click the **Resource Concern Categories** link at the bottom of the page).
7. For each category (listed in the **Categories** table) to include in the template, enter a **Minimum %**, a **Default %** and a **Maximum %**. Note that all **Default %** values in the **Categories** table must total 100 %. Also, the maximum value that can be entered in the **Maximum %** field is 100. The **Included** column displays the current status for a given line in the table (**Not Started**, **In Progress**, and **Complete**).
8. Click **APPLY** to commit the changes. For each category the user defined **Minimum %**, **Default %**, and **Maximum %** values, the system creates a **Resource Concern** table below the **Categories** table. For example, if the user defined values for the **Air quality emissions** category, an **Air quality emissions Resource Concern** table is created.

   For each resource concern (listed in the **Resource Concern** table(s)) that the user wants to be included in the template, enter a **Minimum %**, a **Default %** and a **Maximum %**. Note that all

Default % values in the **Resource Concern** table(s) must total 100 %. Also, the maximum value for the **Maximum %** field is 100.

9. Click **APPLY** to commit the changes. The status in the **Included** column changes to "Complete" for the defined items. Also, the status for the Resource Concern Categories item on the left side of the page now has a green checkmark.
10. From the item list on the left side of the page, click **Practices** (or click the **Practices** link at the bottom of the page).
11. On the **Practices** page, select the practices to be included in the ranking template:
    a. In the **Available Practices** area, select the checkboxes associated with the practices to add to the template. Note the following:
        - In the **Filter** field, enter any desired filter criteria to locate a practice(s).
        - Use the **Sort by** field to select the desired sort type (for example, practice **Code**, **Name**, or **Type**). Note that **Type** represents a practice type. The following practice types are available:
            - Activity
            - Bundle Practice
            - Enhancement Practice
            - CStwP Practice
            - Incentive
            - Long Term Easements
            - Unknown
            - Conservation Practice
            - RCPP
            - Variations
        - Select the **Select All** checkbox to select all practices in the list. Deselect the **Select All** checkbox to deselect all practices in the list.

    b. Click the **ADD TO SELECTED PRACTICES** button to move the selected practices in the **Available Practices** area to the **Selected Practices** area.
    c. In the **Selected Practices** area, select the checkboxes associated with any practices to remove from the **Selected Practices** area. Note the following:
        - In the **Filter** field, enter any desired filter criteria to locate a given practice(s).
        - Use the **Sort by** field to select the desired sort type (for example, practice **Code**, **Name**, or **Type**).
        - Select the **Select All** checkbox to select all practices in the list. Deselect the **Select All** checkbox to deselect all practices in the list.

    d. Click the **REMOVE FROM SELECTED PRACTICES** button to move the selected practices from the **Selected Practices** area to the **Available Practices** area.
    e. Click **SAVE** to save changes.
12. From the item list on the left side of the page, click **Ranking Weights** (or click the **Ranking Weights** link at the bottom of the page).

13. For each factor (listed in the **Ranking Weights** table) to include in the template, enter a **Minimum %**, a **Default %** and a **Maximum %**. Note that all **Default %** values in the **Ranking Weights** table must total 100 %. Also, the maximum value that the user can enter in the **Maximum %** field is 100.
14. Click **APPLY** to commit changes.
15. After the user has completed all required pages for the template (all the items on the left side of the page have a green checkmark), from the **Status** drop-down list, select **Active**, and then click **SAVE**. Now, the user can perform a search (as described in View National Ranking Templates) for the ranking template just created, and see that the status of the template is "Active".

1.5.3 Create a Ranking Pool

Users must have specific roles to create a ranking pool.

To create a ranking pool, do the following:

1. From the toolbar, click **Rank Tool** > **Ranking Pools**.
2. On the **Ranking Pools** page, from the **Select a Ranking Template to list Ranking Pools** drop-down list, select the ranking pool template to be associated with the ranking pool you are creating.
3. Click **ADD NEW RANKING POOL**.
4. On the **New Pool** page, in the **Name** field, type a name for the ranking pool you are creating.
5. From the **State** drop-down list, select the state to be associated to the new ranking pool.
6. From this point, continue to Configuring Land Uses in a Ranking Pool.

1.5.4 Edit a Ranking Pool

Users must have specific roles to edit a ranking pool.

To edit an existing ranking pool, do the following:

1. From the toolbar, click **Rank Tool** > **Ranking Pools**.
2. On the **Ranking Pools** page, from the **Select a Ranking Template to list Ranking Pools** drop-down list, select the ranking pool template associated with the ranking pool to be edited.
3. Click **SHOW RANKING POOLS** to display a table of ranking pools associated with the selected template. To filter the results in the **Ranking Pools** table, enter text in the **Filter Results** field.
4. In the row containing the ranking pool you want to edit, from the **Actions** menu, select **Edit Pool**.
5. Edit the ranking pool, as appropriate. See the following sections for additional information.

1.5.5 Configuring Land Uses in a Ranking Pool

Users must have specific roles to configure the land uses and modifiers included in their ranking Pool using the national Ranking Template Parameters. These Land Uses and required modifiers are set by the

National Ranking Template configuration. Although the required modifiers cannot be unselected, additional modifiers can be added.

When editing a Ranking Pool, you can configure Land Uses by using the following steps:

1. Select **Land Uses**, then use the following guidelines to configure the modifiers for each land use:
   a. Select at least one land use.
   b. Land User Modifiers that are selected in the Parent Template are preselected in the pool you are editing and cannot be deselected.
   c. Add **Modifiers** for each land use, *if applicable*.

   Note: *Modifiers use an **and** logic. So, if they are selected, then the planned land units must be planned with the modifier to be applicable in the ranking pool.*

   d. After selecting at least one land use, the **Land Uses** section on the left side of the navigation menu shows that validation is complete.
   e. Click **SAVE** to save the work with a **Draft Status**.

1.5.6 Configuring Resource Concern Categories

The user will identify resource concerns that will be evaluated within the Ranking Pool.

Users must have specific roles to review the **Weight (%)** values for each **Category** in the Ranking Pool. The **Minimum/Maximum Range** values are set by the **National Ranking Template.** State users can set the **Weight (%)**, which is the default weight percentage, for each category. The entered value must be equal to or fall within the **Minimum/Maximum Range** values. As an example, if an available minimum value is 0, and the user sets the **Weight (%)** value for that category to 0, no points from that area will be included when calculating **Ranking Scores** for an **Assessment**.

When editing a Ranking Pool, the user will follow these steps to review and modify the Weight (%) values:

1. Click **Resource Concern Categories**. The default **Category Weight (%)** and **Resource Concern** values are imported from the parent template. Use the following guidelines to adjust these values:
   a. Click within the **Weight (%)** field for a **Category**, then keep the existing value, or adjust it to fall within the **Minimum** and **Maximum** values listed.

   Note: *The user must click each **Weight (%)** cell for the cell value to be verified.*

   Note: *The sum of the **Weight (%)** values for the **Category** entries must total 100% for the **Resource Concern Category** entries to be valid.*

   b. For each Category, update the default **Weight %** values.

   Note: *The sum of the **Weight (%)** values for each **Category** must total 100% to be valid.*

   c. Click **APPLY** to commit the changes.
   d. After the user completes the entries, and **Resource Concern Categories** shows a validated green checkmark, click **SAVE** to save the work with a **Draft Status**.

1.5.7 Add or Edit Practices for a Ranking Pool

State users with the appropriate role and program jurisdictions can set the available **Practices** for a **Ranking Pool**. The required roles are the **CD-FA State Business Tools Coordinator** and the **Easement State Program Manager**.

When editing a Ranking Pool, you can use the following steps to configure the available practice:

1. Click **Practices**.
2. Filter the **Available Practices** by typing in the **Filter** box. The search begins filtering the practices as soon as you begin to type.

   Note: *The user can set the **Sort by** drop-down menu to sort by **Code**, **Name**, or **Type**.*

3. Select the **Available Practices** to use for this pool, then click **ADD TO SELECTED PRACTICES** to add them to the **Selected Practices**.
4. To remove any of the **Selected Practices,** select the practice located beneath **Selected Practices**, then click **REMOVE FROM SELECTED PRACTICES.**
5. Click **SAVE** to save the work with a **Draft** Status.

1.5.8 Add or Edit Ranking Score Contribution Area Weights for a Ranking Pool

State users with the appropriate role and program jurisdictions can configure the **Weight (%)** values for each Ranking Score Contribution Area in their Ranking Pool using the National Ranking Template parameters. State users can set the default Percentage Weight within the Template parameters. The minimum/maximum values are set by the Template, entered value must be equal to or within the min/max values. If min value available is 0, and User sets the % Weight for that component to 0, no points from that area will be included when calculating Ranking Scores for an Assessment.

You can prioritize the factors used to create the ranking score for this pool.

When editing a Ranking Pool, you can use the following steps to configure the Ranking Weights:

1. Click **Ranking Weights**.
2. Enter the desired **Ranking Weights** for each **Factor** in the relevant **Weight (%) field.**

   Note: *You must click each **Weight (%)** cell for the cell value to be verified.*

   Note: *The sum of the **Weight (%)** values for the **Factors** entries must total 100% for the **Ranking Weights** entries to be valid.*

3. Click **APPLY** to commit the changes.
4. Click **SAVE** to save the work with a **Draft** Status.

1.5.9 Add a Display Group for a Ranking Pool

State users with the appropriate role and program jurisdictions can create and configure the **Display Group** section of a **Ranking Pool** with traditional ranking questions for a **Ranking Pool**. These questions can include geospatial questions that can be automatically answered by referencing data in a **Practice Schedule** against data in published geodata.

When configuring the **Survey List** questions for a **Display Group**, consider the following information:

- A green checkmark appears on the left side of the navigation menu to show that validation is complete for a section.
- If a section is not complete, look for a clock symbol next to the section.
- To add a survey question for a section, click the plus sign next to the question type.
- Any time you save a configured question, the question section might close. Click next to the question you were editing to reopen it.
- When allocating points, click Actions for the **Program Points** for the selected **Available Choice**, then enter the points the user wants allocated for this **Available Choice**.
- To open any of the **Available Conditions**, click the next to each one in which the user is interested.

There are four Display Group sections for which you need to create questions:

- **Applicability Questions**: Only create one of these questions per **Ranking Pool**. This question is used to determine the geospatial boundaries or applicant type for a Ranking Pool. The geospatial boundaries may be the entire state, a set of counties, or a specific watershed. The applicant type might be a text question that is used to describe the participant's status.
- **Category Questions**: Only create one of these questions per **Ranking Pool**. This question is used to sort applications based on a geospatial or text question. This question could be used for any **Ranking Pool** to sort application so that they are ranked with like applications, such as being ranked by watershed, parish, or service center.
- **Program Questions**: These questions can be geospatial or text-based. They are used for program priorities or policy-based ranking questions. They can be configured to be conditional, depending on how other questions are answered. These questions can be yes/no, multiple choice, and multiple answer. The answer points can be positive or negative values.
- **Resource Questions**: These questions can be geospatial or text-based. They are used for resource priorities, resource-based, State ranking questions, or local ranking questions. They can be configured to be conditional, depending on how other questions are answered. These questions can be yes/no, multiple choice, and multiple answer. The answer points can be positive or negative values.

When editing a Ranking Pool, you can use the following steps to configure a Display Group:

1. Click **Display Groups**.
2. Click **ADD NEW DISPLAY GROUP**.
3. Enter a **Display Group Name**, then set the **Status** to **Draft**.
4. Click **SAVE** to save the work.

1.5.9.1 Configuring Applicability Questions

The information in this section assumes the user is adding a new **Display Group** and is in the **Ranking Pool > Edit Pool** page in the user interface (UI).

To add a survey question for Applicability, complete the following steps:

1. Click the plus sign next to **Applicability Questions** to add a new section.
2. In the **Add Section** dialog box, enter the **Applicability Questions Section Name** the user wants to use, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question being configured (**Text** or **Geospatial**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
   d. If the user only wants the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
   e. Type a **Choices Group Name**.
   f. To configure answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
   g. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** setting to **ANY**.
   c. If the user only wants the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** setting to **ALL**.
   d. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first answer choice.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.

2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If the user only wants the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices**, then type the answer choice. Complete this step for every possible answer for this question.
9. Click **SAVE** to store selections. If the question closes after the user saves the selection, reopen the question the user was editing.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.
    b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
    c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
    d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
    e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
    f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
    g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
    h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
    i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.
11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.

3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure the Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
   a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
   b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.

2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.5.9.2 Configuring Category Questions

The information in this section assumes the user is adding a new **Display Group** and are in the **Ranking Pool > Edit Pool** page in the UI.

To add a survey question for Category, complete the following steps:

1. Click the plus sign next to **Category Questions** to add a new section.
2. In the **Add Section** dialog box, enter the **Category Questions Section Name** the user wants to use, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.

6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. Type a **Choices Group Name**.
   d. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
   e. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.

3. To create a condition where the question being added will only appear when the specified answer occurs, click the plua sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices** , then type the answer choice. Complete this step for every possible answer for this question.
9. For each answer, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.

b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.

11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
    a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
    b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which you are interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.

6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.5.9.3 Configuring Program Questions

The information in this section assumes the user is adding a new **Display Group** and are in the **Ranking Pool > Edit Pool** page in the UI.

To add a survey question for Program, complete the following steps:

1. Click the plus sign next to **Program Questions** to add a new section.
2. In the **Add Section** dialog box, enter the **Program Questions Section Name** the user wants to use, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
    a. Set the **Require Answer** slider to the on position if the question must be answered.
    b. Set the **Allow Multiple Answers** slider to the on position if the question can have multiple answers.
    c. Type a **Choices Group Name**.
    d. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
    e. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the on position if the question must be answered.
   b. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the on position.

If the user selected Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the user configured the desired condition.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.

5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices** , then type the answer choice. Complete this step for every possible answer for this question.
9. For each answer, click on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.
    b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
    c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
    d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
    e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
    f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
    g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
    h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
    i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.
11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
    a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
    b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.

3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.5.9.4 Configuring Resource Questions

The information in this section assumes the user is adding a new **Display Group** and are in the **Ranking Pool > Edit Pool** page in the UI.

To add a survey question for Resource Questions, complete the following steps:

1. Click the plus sign next to **Resource Questions** to add a new section.

2. In the **Add Section** dialog box, enter the **Resource Questions Section Name** the user wants to use, then click **SAVE**.
3. Click the **Questions** tab in the section for the newly added **Display Group**.
4. Click the plus sign next to **Questions** beneath the newly added section.
5. Type the question information in the **Question Text** and **Question Hover Text** fields.
6. Complete the appropriate steps shown below for the type of question the user is configuring (**Text**, **Geospatial**, or **Webservice**).

To configure a Text Question Type, complete the following steps:

1. Select the **Text Question Type**.
2. Select the **Choices** tab.
3. Set the **Answer Type** to **Multiple Choice** if there are more than two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
   c. Type a **Choices Group Name**.
   d. To configure the answer choices, click the plus sign, then type the answer choice. Complete this step for every possible answer for this question.
   e. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
4. Set the **Answer Type** to **Boolean** if there are only two possible answers to the question. If the user selects this **Answer Type**, complete the following steps:
   a. Set the **Require Answer** slider to the **On** position if the question must be answered.
   b. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure points allocation, complete the following steps:

1. Select the **Points** tab.
2. If the user wants to allocate points for this question, set the **Allocate Points** slider to the **On** position.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**

5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Geospatial Question Type, complete the following steps:

1. Select the **Geospatial Question Type**.
2. Select the **Choices** tab.
3. Set the **Require Answer** slider to the **On** position if the question must be answered.
4. Set the **Allow Multiple Answers** slider to the **On** position if the question can have multiple answers.
5. If the user wants all the land units to be included in this display group when any land unit qualifies, set the **Land Unit Qualification** slider to **ANY**.
6. If you only want the land units that qualify on their own merits to be included in this display group, set the **Land Unit Qualification** slider to **ALL**.
7. Type a **Choices Group Name**.
8. To configure the answer choices, click **Choices** ⊕, then type the answer choice. Complete this step for every possible answer for this question.

9. For each answer, click [edit icon] on the right side of the **Geospatial Definition** to edit the geospatial layer and the question definition.
10. If the user's State has published geodata to the geoportal, the user can do a Layer Search by doing the following:
    a. Expand the **Layer Search**.
    b. To see all the nationally published geospatial layers, do not enter a **Layer Name** or **State**. Click **SEARCH** with no filters to see all possibilities.
    c. If the user knows the layer, enter a **Layer Name** in the text field and choose the **State** from the **select a state** drop-down menu. Click **SEARCH** and view the filtered search results.
    d. Click the plus sign in the **Actions** column next to the geospatial layer the user wants to load.
    e. Select an **Intersection Type**. For example, you might select a **Buffer Zone** and enter the number of feet the user wants included in the **Buffer Zone**.
    f. To configure this geospatial layer, click the plus sign in the **Actions** column next to each field the user wants to configure.
    g. Configure the field values for the selected field using the **Operato**r and **Value** drop-down menus.
    h. Click **SAVE** after the user finishes configuring the geospatial later that is currently loaded.
    i. Use the above steps to load and configure other geospatial layers **Choices** the user wants to use.
11. After configuring the choices, click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.
12. Set the **Require Answer** slider to the **On** position.
13. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.
4. Check the table that appears at the top to make sure the desired condition was configured.

5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To configure a Webservice Question Type, complete the following steps:

1. Select the **Webservice Question Type**.
2. Select the **Choices** tab.
   a. Using the **Webservice Rating** drop-down menu, select the **Webservice Rating** the user wants to use for this question.
   b. Click **SAVE** to store these selections. If the question closes after the user saves the selections, reopen the question the user was editing.
3. Select the **Points** tab.

If the user selects Allocate Points, complete the following steps:

1. Select the first **Available Choice**.
2. Click the **Actions** plus sign for **Program Points**, then enter the points the user wants allocated for this answer choice.
3. Click the **Actions** plus sign for **Resource Priority Points**, then enter the points the user wants allocated for this answer choice.
4. Select the next **Available Choice**, then complete the above steps for each **Available Choice.**
5. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

To set conditions, complete the following steps:

1. Select the **Conditions** tab, and the **Available Conditions** appear.
2. Open the first of the **Available Conditions** in which the user is interested.
3. To create a condition where the question being added will only appear when the specified answer occurs, click the plus sign next to the desired qualifying answer.

4. Check the table that appears at the top to make sure the desired condition was configured.
5. Repeat these steps for each of the **Available Conditions** in which the user is interested.
6. Click **SAVE** to store the selections. If the question closes after the user saves the selection, reopen the question the user was editing.

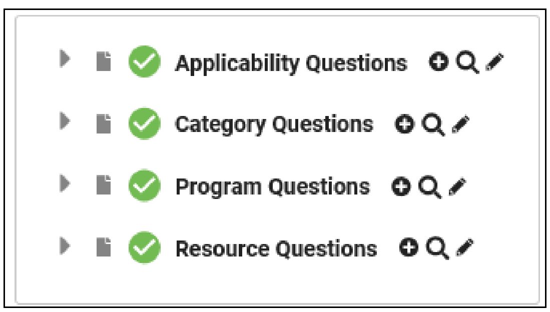
To set Land Uses, complete the following steps:

Note that if a land use is assigned to a question then that question is only displayed if the land use matches the defined land use for the associated question.

1. Select the **Land Uses** tab.
2. Using the **Select a Land Use** drop-down menu, select a **Land Use** that the user wants to add to for this question.
3. To set the **Land Use Modifiers** for this question, select the modifiers the user wants to use, then click **Add**.
4. Continue to add modifiers for each **Land Use** that the user desires for this question.
5. Click **SAVE** to store the selections.

1.5.9.5 Publishing the Display Group

After answering the four questions in this section, the user will find a green check mark next to each question type as show below:



If each question type has the green mark checked, the user is ready to publish this display group.

To publish the new Display Group, complete the following steps:

1. Save the ranking pool with a **Draft** status.
2. Click the **PUBLISH** button.
3. The user will be prompted to click **OK** to publish the **Display Group.** Click **OK** to publish the **Display Group.**

1.6 Assessment

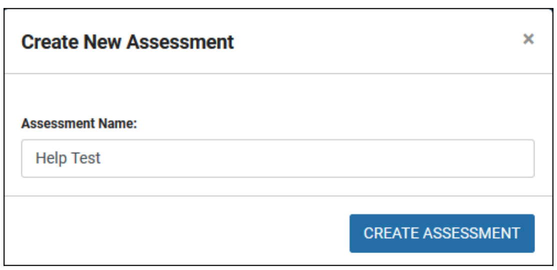
During the assessment CART incorporates static and geospatially driven standard and variable thresholds that are intended to represent the effort needed to attain a target-level of resource conservation using conservation management and conservation practices. The existing condition and planned practices information the planner enters during the assessment will be compared to these thresholds to determine if target-level resource conservation is achieved.

1.6.1 Create a New Assessment from Conservation Desktop

Create a new assessment for an existing alternative plan:

1. From Conservation Desktop, log on as a user with permissions to open a practice schedule or a case file that contains practice schedules. For assessment activities, this is typically someone with the role of Planner or Certified Planner.
2. Open a Consplan Practice Schedule. The practice schedule should have at least one digitized Planned Land Unit (PLU).
3. When the practice schedule is of type **Conservation**, the **Assess** button will display on the Table of Contents panel. Expand the Practice Schedule accordion, and then click **Assess**.
4. When the **CONSERVATION ASSESSMENT RANKING TOOL (CART)** window opens and the **Create New Assessment** dialog box appears, do one of the following:
   a. On the **Create New Assessment** dialog box, under **Assessment Name**, accept the prepopulated value (*the default name of the practice schedule that you opened in step 2*) or change it to a desired name, and then click **CREATE ASSESSMENT**.

      Note: *Assessment names can only contain these characters: ,<>+A-Za-z0-9?.:;- If the pre-populated, default name has an underscore, it will need to be changed in order to proceed.*

5. The message "**Creating assessment…Please Wait**" displays**.**

   Note: *Initial geospatial processing related to thresholds and existing conditions is completed during the creation of the assessment. Therefore, users may experience a delay to create the assessment. Do not refresh, or click F5, during this process.*

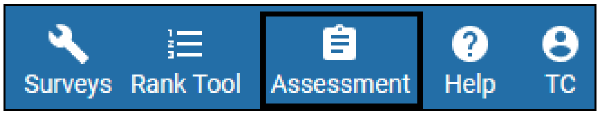
6. CART loads the new assessment.

   Note: *When opening the new assessment initially, it will show status of "**Not Started**" for **Resource Concerns**, **Resource Inventory**, **Existing Practices**, **Planned Practices**, and **Overall Status**.*

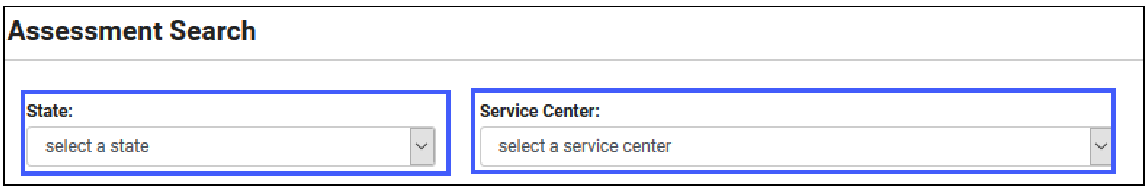
1.6.2 Search for an Existing Assessment

Search for assessments by state, service center, and client name:

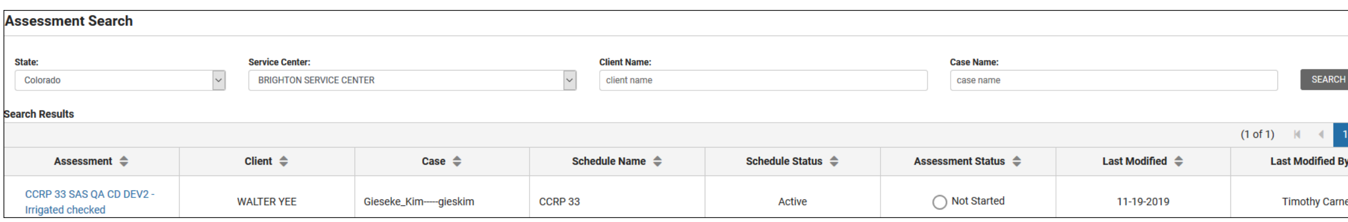
1. From either the main **CONSERVATION ASSESSMENT RANKING TOOL** page, or the toolbar, click **Assessment**.



2. From the **Assessments Search** page, use the drop-down menus to select the client's **State** and **Service Center** for the assessment. Both a State and Service Center must be selected to proceed with the search.



3. Type in the **Client Name** and/or **Case Name** to narrow the search.
4. Click **SEARCH**.
5. The **CONSERVATION ASSESSMENT RANKING TOOL** returns the search results. Headings include **Assessment**, **Client**, **Case**, **Schedule Name**, **Schedule Status**, **Assessment Status**, **Last Modified**, and **Modified By**. To sort results, click on the arrows for the appropriate heading label. Clicking once sorts in ascending order; a second click changes the sort to descending.



6. To open an assessment, click on the assessment name under the **Assessment** column. The assessment opens to the **Assessment Summary** page.

   To make changes to an assessment, it must have an unlocked status. The **Save Changes** and **Clear Changes** buttons are disabled when the assessment is locked.

   If the planner can change the status, the following message displays: "**This assessment is locked. To make additional changes, you must change its status back to an unlocked value.**" This is accomplished by changing the status from **Ready for Ranking** to **In Assessment** in the **Assessment Status** drop down on the **Assessment Summary** page.

   When the assessment status cannot currently be changed by the planner, the following message displays: "**This assessment is locked. To make additional changes, you must wait for other users to complete the next workflow step(s) for this assessment.**" This applies to both observed and historical practices.

1.6.3 Assessment Summary Tab

1.6.3.1 Edit an existing assessment

Open an existing assessment to see a status summary for each step in the assessment and to complete any of the incomplete steps.

1. Open the **CONSERVATION ASSESSMENT RANKING TOOL.** Select **Assessment** from the toolbar at the top of the page.
2. From the **Assessments Search** page, use the drop-down menus to select the client's **State** and **Service Center**. Optionally, you can type the **Client Name** and **Case Name** to narrow the search.
3. Open an existing assessment by clicking on the name in the **Assessment** column. The assessment opens to the **Assessment Summary** page.
4. Below the assessment title is the **Assessment Date**, **Case Name**, **Schedule Status**, **Assessment Status**, **Planner Name**, **Client Name**, and **Schedule Name**. This information is pre-populated and cannot be edited, except for **Assessment Status**. Optionally, select **Discarded** if you wish to discard the assessment.

   The Assessment Summary is derived from the following location/information:

Assessment Summary Label	Derived From
Assessment Date	Date that the Assessment was created in Conservation Desktop (CD).
Case Name	This matches the CD Case file name.
Schedule Status	This is either Alternative or Active and is ported from CD.
Assessment Status	Defaults to In Assessment. There is also an option to discard the assessment. When the assessment is complete, the Ready for Ranking option is available.
Planner Name	Name of Planner logged into CART.
Client Name	Ported from CD.
Schedule Name	Defaults to Practice Schedule name.

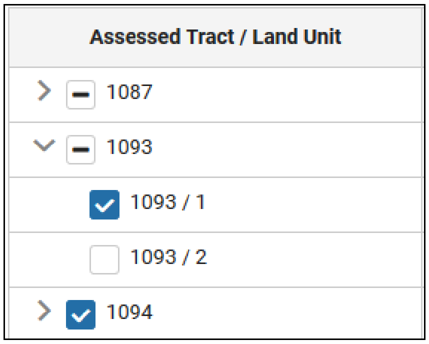
Complete Assessment Resource Concerns, Resource Inventory, Existing Practices, and Planned Practices

The **Land Use**, **PLU Modifiers**, **Resource Concerns**, **Resource Inventory**, **Existing Practices**, and **Planned Practices** columns should be completed, in order, from left to right. This ensures that the data in the plan rollup reflects accurate point totals for the assessment.

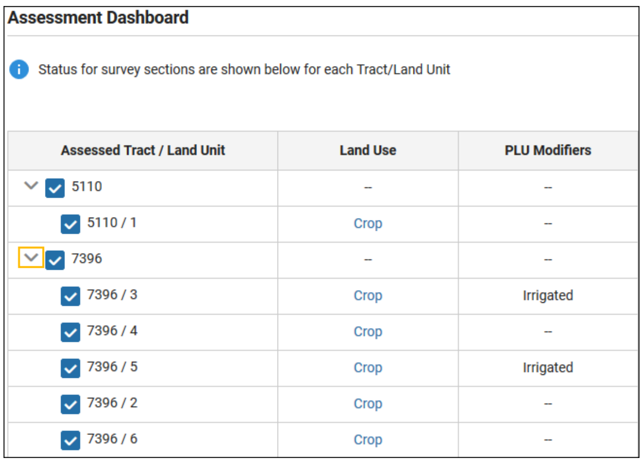
With the assessment open, begin working the columns from left to right:

1. To expand the land units, click the down arrow(s) in the **Assessed Tract/Land Unit** column in each survey section. By default, the tracts and land units are selected. Click on the box to deselect any land units you do not want to include in the assessment.

   When only a subset of the land units listed under a tract number are selected, the checkmark changes to a dash in the tract number selection box. This signifies that the tract contains some land units that are not selected for inclusion in the assessment.



Assessed Tract / Land Unit
1087
1093
1093 / 1
1093 / 2
1094



Assessment Dashboard

Status for survey sections are shown below for each Tract/Land Unit

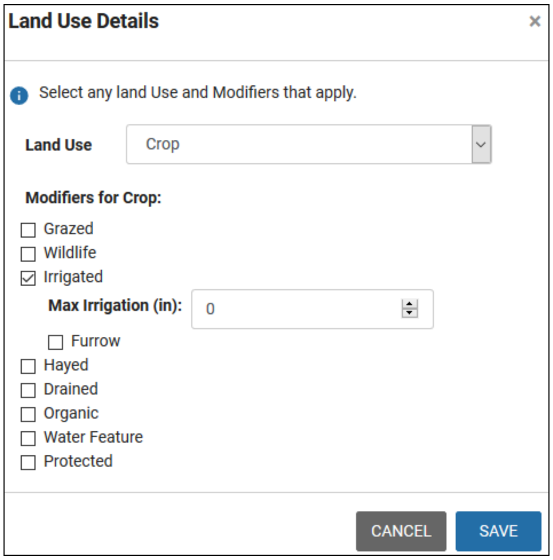
Assessed Tract / Land Unit	Land Use	PLU Modifiers
5110	--	--
5110 / 1	Crop	--
7396	--	--
7396 / 3	Crop	Irrigated
7396 / 4	Crop	--
7396 / 5	Crop	Irrigated
7396 / 2	Crop	--
7396 / 6	Crop	--

2. In the above example, select “Crop” in the Land Use column to select any modifiers that may apply. Select applicable modifiers from the selection list in the Land Use Details dialog.

   The **Max Irrigation (in/ac/yr):** value is required if the modifier **Irrigated** is checked in the **Land**

Use column. Continue applying modifiers to all applicable land units until complete, then click **SAVE**. After the dialog box closes, your selections display in the **PLU Modifiers** column.

> **Note:** *To change or edit a land use with the **CONSERVATION ASSESSMENT RANKING TOOL** pulled over from the **Conservation Desktop** application, select a different land use from the drop-down menu, then select **SAVE**.*



3. From the **Assessment Summary** page, select **SAVE CHANGES**. Optionally, to remove any edits made to the land uses or modifiers, select **CLEAR CHANGES**.

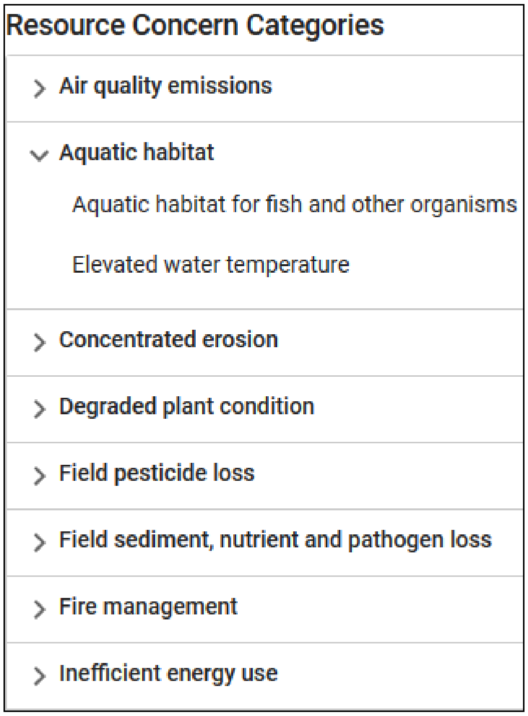
> **Note:** *When land use details are assigned to a land unit, the next steps in the workflow are applicable for the selected land use only. If you answer the resource concern and inventory questions for the current land use and then go back to change the land use, you may need to re-enter the resource concern and inventory answers as they may not be applicable to the new land use.*

Assigning Resource Concerns

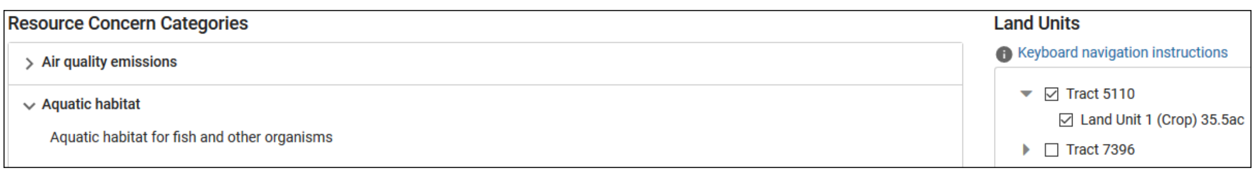
NRCS has identified a number of resource concerns and the need for conservation practices to meet the assessment threshold. Assigning resource concerns allows you to identify the resource concerns that are present on each land unit under assessment, and then view a summary when complete.

1. Open an assessment to the **Assessment Summary** page. Click on the **Resource Concerns** tab.

2. Select a resource concern from the **Resource Concern Categories**. Expand the resource concern categories by clicking the arrow next to the category name. Make your selection from the list.



3. Under the **Land Units** section (*right side of screen*), select the tract arrows to expand the **Land Units** tree.



> **Note:** *Use the **View By** drop-down menu to group and view land units by land use type or by tract.*

4. To apply the resource concern that you selected from the **Resource Concern Categories**, select a tract and land unit. Continue selecting resource concerns and applying them to land units until done.

> **Note:** *Rather than selecting the box next to each individual land unit, you can select the box at the tract level to apply a resource concern to every land unit under that tract.*

5. To check that the resource concerns were applied, scroll down to the bottom of the page to see the selected resource concerns listed for the selected land units in the **Summary Grid**.

Summary Grid

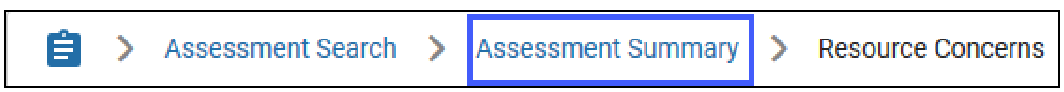
Done	Tract/Land Unit	Emissions of airborne reactive nitrogen
☐	Tract 1094 / Land Unit 6	Selected
☐	Tract 1087 / Land Unit 1	–
☐	Tract 5151 / Land Unit 1	–
☐	Tract 5145 / Land Unit 1	–
☐	Tract 5148 / Land Unit 1	–
☐	Tract 2444 / Land Unit 1	–
☐	Tract 821 / Land Unit 1	–

6. When all resource concerns are applied, select **Done** next to each tract/land unit to save the entry. All tract/land units must be marked **Done** for **Resource Concerns** to be marked **Complete**, rather than **In Progress**, on the **Assessment Summary** page.

Summary Grid

Done	Tract/Land Unit	Aquatic habitat for fish and other organisms	Elevated water temperature	Pesticides transported to groundwater
✓	Tract 7396 / Land Unit 3	Selected	–	Selected
✓	Tract 7396 / Land Unit 2	Selected	–	Selected
✓	Tract 7396 / Land Unit 6	–	Selected	–
✓	Tract 7396 / Land Unit 4	–	–	Selected
✓	Tract 7396 / Land Unit 5	–	–	Selected

7. When finished, select **SAVE RESOURCE CONCERNS**.
8. Click on the breadcrumbs at the top of the page to navigate back to **Assessment Summary**.



9. If you have completed the **Resource Concerns** section (*all land units have a green checkmark and are marked **Complete***), you can begin working on the **Resource Inventory** section.

Assessment Dashboard

Status for survey sections are shown below for each Tract/Land Unit

Assessed Tract / Land Unit	Land Use	PLU Modifiers	Acres	Resource Concerns
☑ 5110	–	–	–	Complete
☑ 7396	–	–	–	Complete

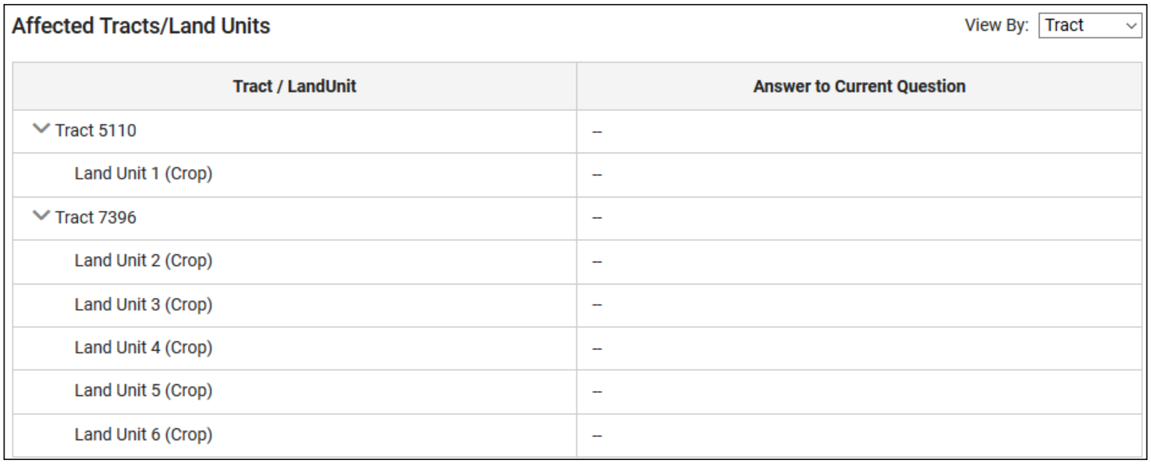
Complete a Resource Inventory

Resource Inventory questions may be dependent on the land use, land use modifiers, resource concerns previously identified for a specific land unit, or may generally apply to all land units.

Some questions may not require an answer because they were automatically answered by referencing data in a practice schedule against data in published geodata.

1. From the **Assessment Summary** page, select **Resource Inventory**.

2. In the **Affected Tracts/Land Units** section, select each tract to expand the **Tract/Land Unit** tree.

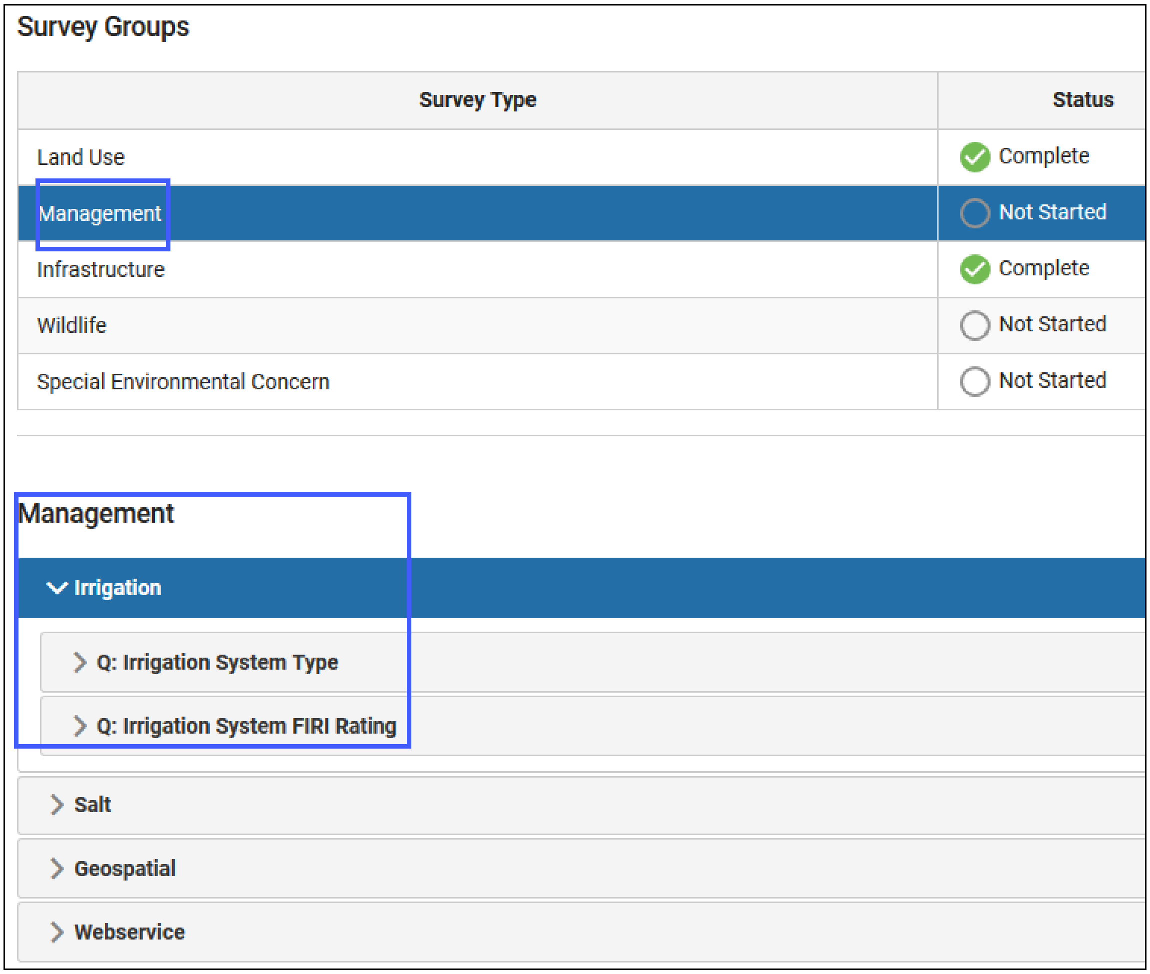


Affected Tracts/Land Units — View By: Tract

Tract / LandUnit	Answer to Current Question
Tract 5110	–
Land Unit 1 (Crop)	–
Tract 7396	–
Land Unit 2 (Crop)	–
Land Unit 3 (Crop)	–
Land Unit 4 (Crop)	–
Land Unit 5 (Crop)	–
Land Unit 6 (Crop)	–

Note: *Use the **View By** drop-down menu to view this table by **Tract (**default) or **Land Use**. **Tract** is the tree view. Ensure that the tree is fully collapsed when **View By** is changed to **Land Use**.*

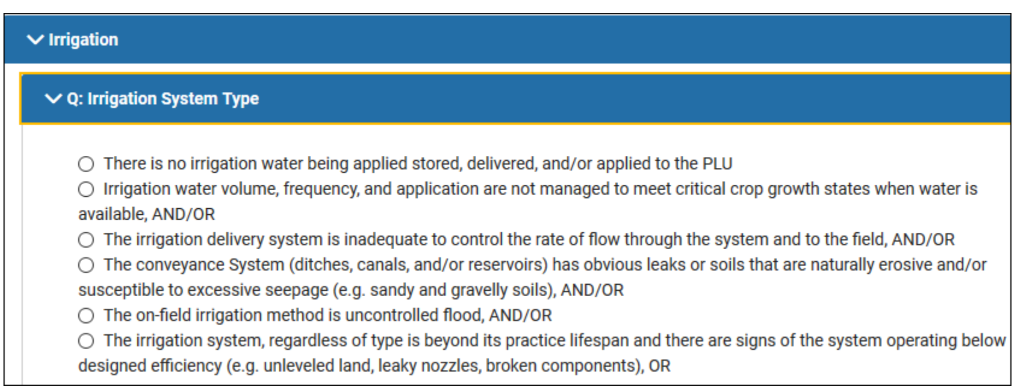
3. To load the survey, select a **Survey Type** from the **Survey Groups** that have a status of **Not Started**.



4. After selecting the **Survey Type**, the survey and questions display below **Survey Type**. Select the arrow next to **Survey Type** to expand the survey questions.

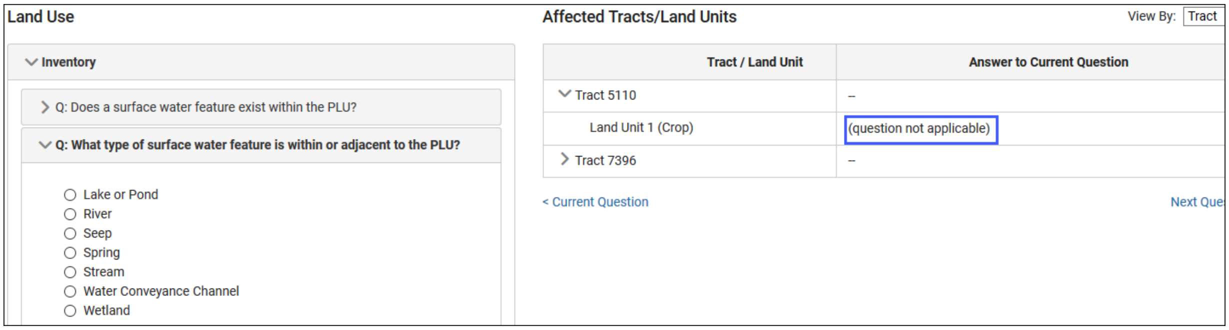
> **Note:** *If you see a survey status of "**Complete**" in this section, no answers are required for the associated land units for that question.*

5. To expand the answers for each question, select the question preceded by the letter "Q".



6. Select the answer and select the Tract/Land Unit(s) to apply the answer to the land unit(s) in each tract(s). Or, if the survey was configured to accept multiple answers, you may select as many answers as applicable.

> **Note:** *Some questions are not applicable to the resource. In this case, (**question not applicable**) displays in the **Answer to Current Question** column in the **Affected Tracts/Land Units** table.*



7. Answer the remaining **Survey Group** questions until complete. Some survey sections or survey questions are conditional on the answers to other questions. The Survey Group status will be validated as "**Complete**" for a survey when all applicable questions in that survey have been answered for each required land unit.

Survey Groups

Survey Type	Status
Land Use	Complete
Management	Complete
Infrastructure	Complete
Wildlife	Complete
Special Environmental Concern	Complete

8. The **Required Questions Completed** column is marked "**Yes**" or "**No**" in the **Summary Grid** table when all applicable questions in that survey are answered for each required land unit.

Summary Grid

Tract / Land Unit	Required Questions Completed	Mark Complete	Land Unit Status
Tract 5110 / Land Unit 1	Yes	☑	Complete
Tract 7396 / Land Unit 2	Yes	☑	Complete
Tract 7396 / Land Unit 3	Yes	☑	Complete
Tract 7396 / Land Unit 4	Yes	☑	Complete
Tract 7396 / Land Unit 5	Yes	☑	Complete
Tract 7396 / Land Unit 6	Yes	☑	Complete

9. Select the checkbox for each land unit in the **Mark Complete** column to save the entries for all land units. Select **Save Answers** at the bottom of the page. The **Land Unit Status** will change from "**In Progress**" to "**Complete**".

   Note: *If you notice unexpected answers on the Resource Inventory page, return to the **Assessment Summary** tab and perform a manual recalculation to refresh the screen. Click on the **ACTION** menu, then click the **RECALCULATE** button. This will regenerate automatically-answered geospatial and web service questions, clean up obsolete data, and update all point calculations.*

Summary Grid

Tract / Land Unit	Required Questions Completed	Mark Complete	Land Unit Status
Tract 5110 / Land Unit 1	Yes	☑	Complete
Tract 7396 / Land Unit 2	Yes	☑	Complete
Tract 7396 / Land Unit 3	Yes	☑	Complete
Tract 7396 / Land Unit 4	Yes	☑	Complete
Tract 7396 / Land Unit 5	Yes	☑	Complete
Tract 7396 / Land Unit 6	Yes	☑	Complete

SAVE ANSWERS

10. Select **Assessment Summary** from the breadcrumbs at the top of the page.

> Assessment Search > Assessment Summary

11. The **Assessment Summary** page shows the status for the **Resource Inventory** column as "**Complete**".

Assessed Tract / Land Unit	Land Use	PLU Modifiers	Acres	Resource Concerns	Resource Inventory
5110	–	–	–	Complete	Complete
7396	–	–	–	Complete	Complete

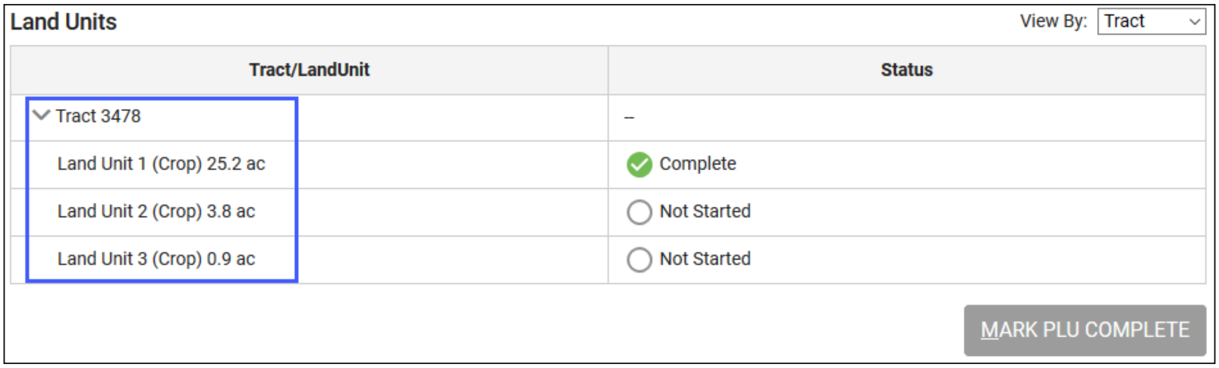
Add Existing Practices

A list of Historical Practices is displayed for a land unit when you click on a land unit in the tree view. Planners will be able to add Observed Practices to a land unit and indicate if the Historical and Observed Practices are still functional. After verifying the Existing Practices, they will be able to add Planned Practices in CART (which will display as "Draft" practices in CD). Planners can also add supporting Practices, which support primary Planned Practices.

1. Select **Existing Practices** from the **Assessment Summary** page.

Assessed Tract / Land Unit	Land Use	PLU Modifiers	Acres	Resource Concerns	Resource Inventory	Existing Practices
4139	–	–	–	Complete	Complete	Not Started

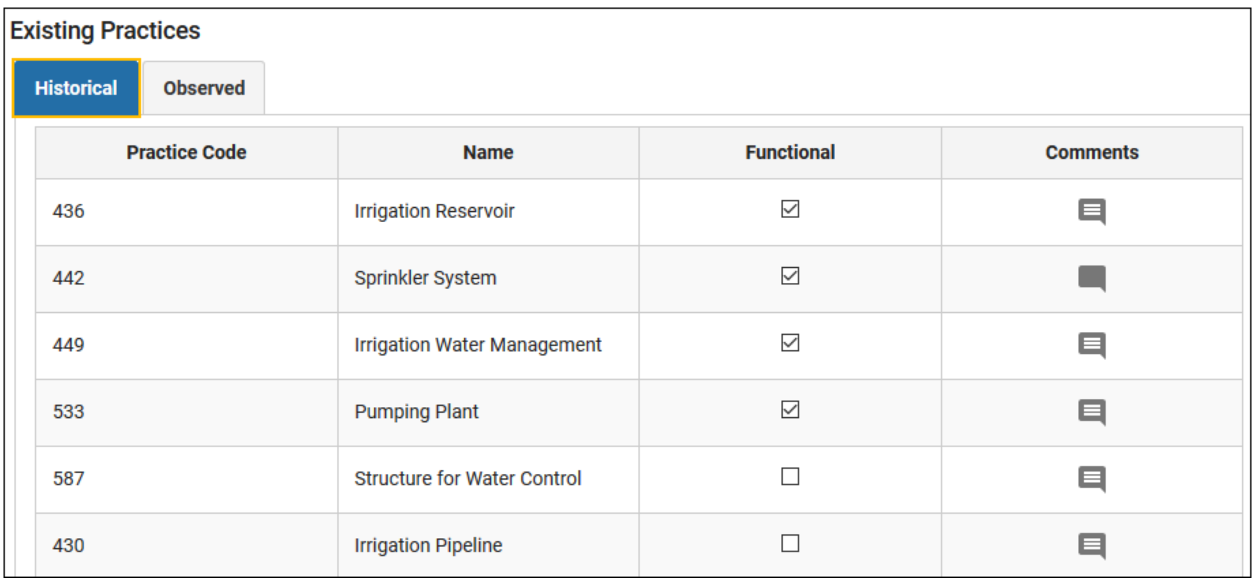
2. On the **Existing Practices** page, select the arrows next to the tract names to expand the land units in a tree view.



3. Select the land unit(s).

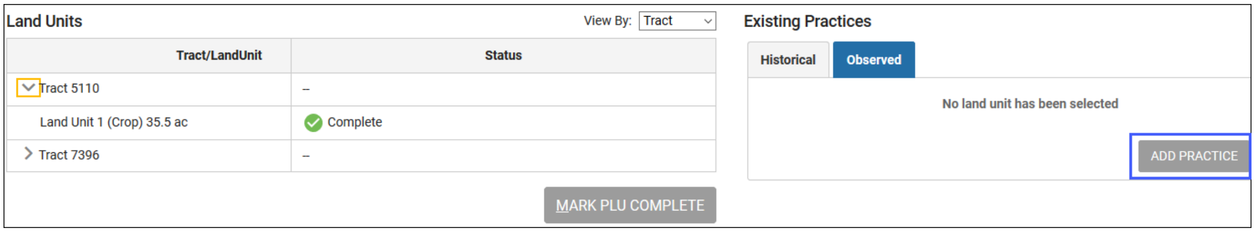
Note: *If the land unit is in a locked state and cannot be changed, a lock icon appears next to the land unit. This applies to both observed and historical practices.*

4. Select the **Historical** tab, under the **Existing Practices** heading, to view the historical practices.

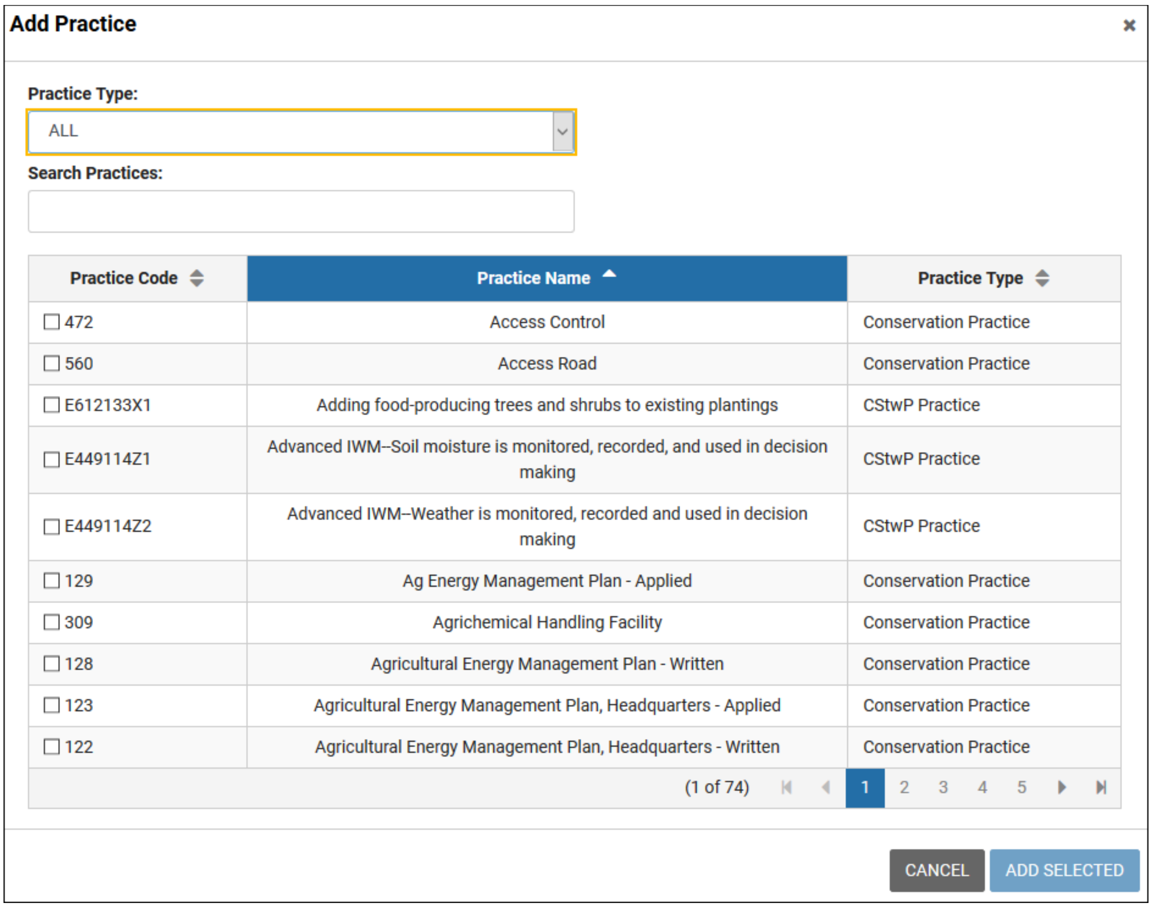


Note: *Applied practices, and practices that are in a planned state that are obligated, will display as "historical". If a historical practice is no longer functional, uncheck the* ***Functional*** *checkbox to mark the practice non-functional. If a practice is set to non-functional, the Planner must enter a comment. When a practice is marked non-functional, the points that practice contributes towards measuring the practice effect on addressing resource concerns will be ignored.*

5. Keeping the land unit selected, select the **Observed** tab. If you want to add an observed practice, select the **Add Practice** button.

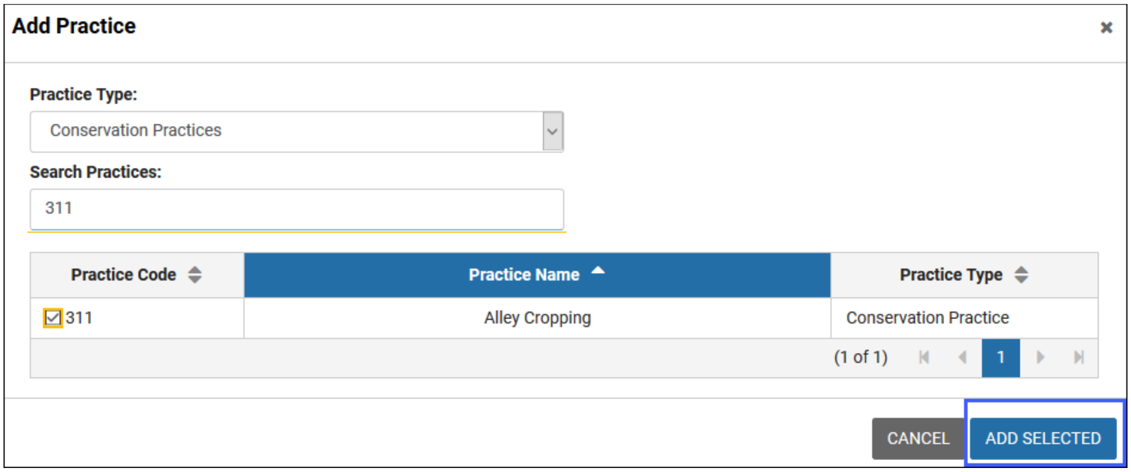


6. The **Add Practice** dialog box displays.



7. Practice types can be selected from the **Practice Type** dialog box to narrow the search results. In the example below, **Conservation Practices** was selected from the drop-down menu.

8. Filter and narrow your Existing Practices search by using the **Search Practices** text box. Existing Practices can be searched by both **Practice Name** and **Practice Code**. Enter one, or the other, in the **Search Practices** text box.



9. Select the checkbox in front of the desired practice, and then click the **ADD SELECTED** button.

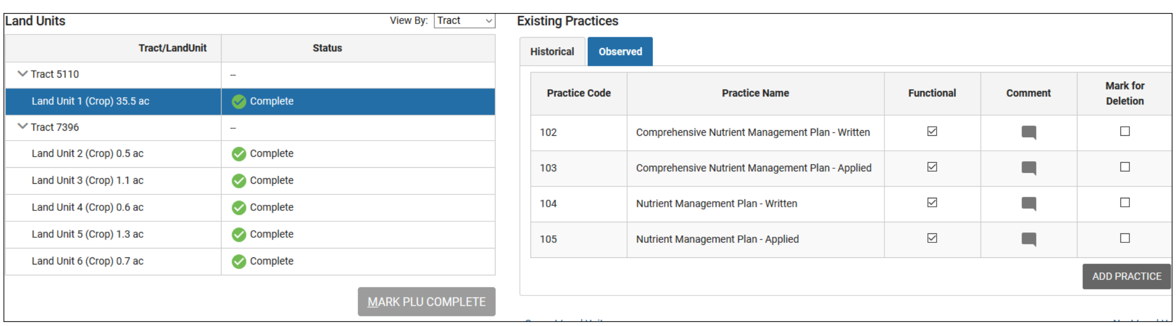
> **Note:** *The **Cancel** button will undo changes and the **Add Selected** button will add the practice to the land unit.*

10. The practice is added to the list. The following actions are available after a practice has been added to a land unit:

    a. **Functional**: If a practice is no longer functional (*defined as fulfilling the purpose of addressing a resource concern*), select the checkbox to uncheck it. By default, all added practices are set to **Functional**.

    b. **Comments:** A comment is required for any practice that is set to non-functional.

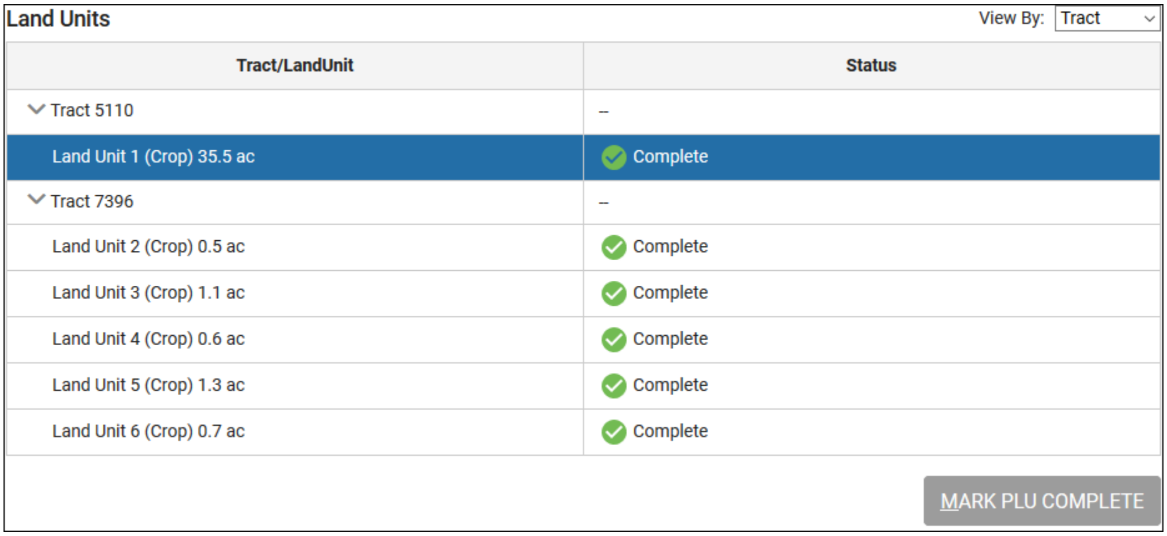
    c. **Delete:** To remove a practice from the land unit, check the box under the **Mark for Deletion** column and **SAVE**.



11. Select **MARK PLU COMPLETE**, under **Tracts/Land Units**, to add the practice to the land unit.

> **Note:** *Land units can be marked complete after each practice has been added to each individual land unit, or at the end after all practices have been added/verified for all applicable land units.*

12. The land unit is verified as "**Complete**" with a green checkmark.



Land Units — View By: Tract

Tract/LandUnit	Status
Tract 5110	–
Land Unit 1 (Crop) 35.5 ac	Complete
Tract 7396	–
Land Unit 2 (Crop) 0.5 ac	Complete
Land Unit 3 (Crop) 1.1 ac	Complete
Land Unit 4 (Crop) 0.6 ac	Complete
Land Unit 5 (Crop) 1.3 ac	Complete
Land Unit 6 (Crop) 0.7 ac	Complete

MARK PLU COMPLETE

13. Repeat adding practices by searching and adding each practice by name, or by practice code, until complete.
14. When finished adding and verifying existing practices, select each land unit from the **Tracts/land Units** dialog box and click the **MARK PLU COMPLETE** button.

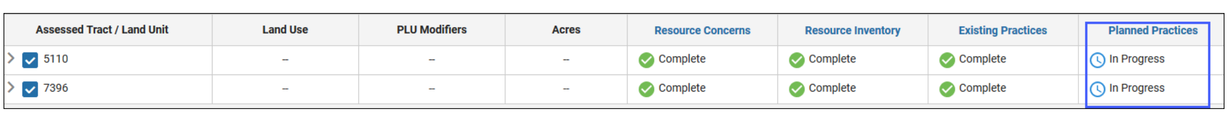
Note: *If a PLU does not have any existing practices, continue to select the PLU and click the **MARK PLU COMPLETE** button.*

15. When finished, click **SAVE**. The **Saving Data** message displays "**Saved successfully!**" Select **Close**.
16. Return to the **Assessment Summary** page by clicking on **Assessment Summary** in the breadcrumbs at the top of the page.

Add Planned Practices

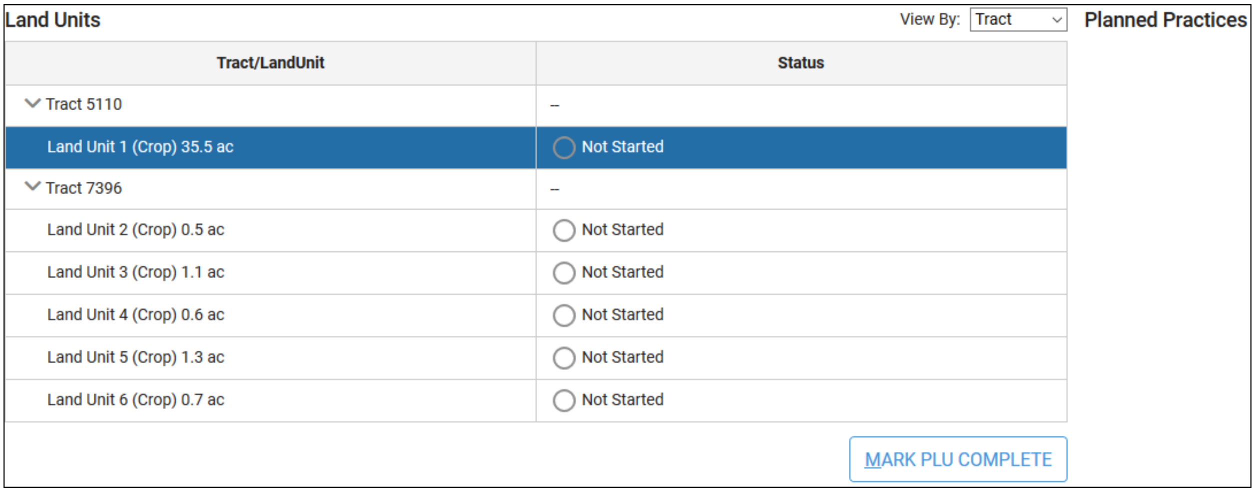
Planners will be able to add Planned Practices (primary and supporting practices) in CART, which will display as "Draft" status in Conservation Desktop.

1. Select **Planned Practices** from the **Assessment Summary** page.



Assessed Tract / Land Unit	Land Use	PLU Modifiers	Acres	Resource Concerns	Resource Inventory	Existing Practices	Planned Practices
5110	–	–	–	Complete	Complete	Complete	In Progress
7396	–	–	–	Complete	Complete	Complete	In Progress

2. On the **Planned Practices** page, select the arrows next to the tract names to expand the land units in a tree view.

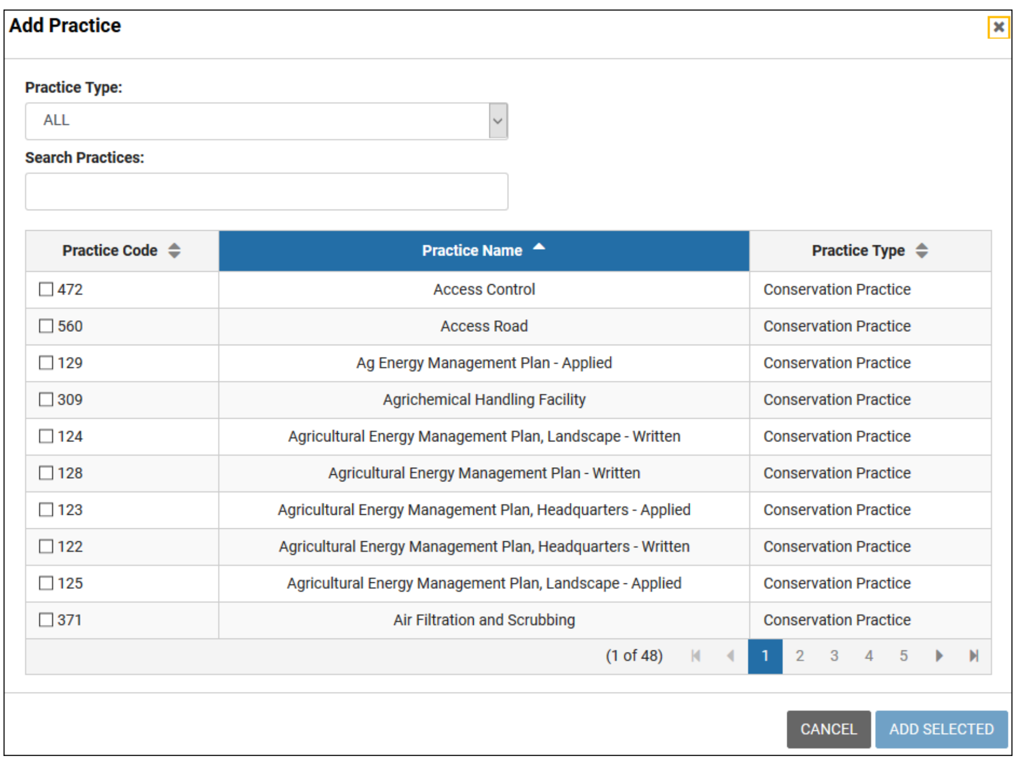


3. Select a land unit.

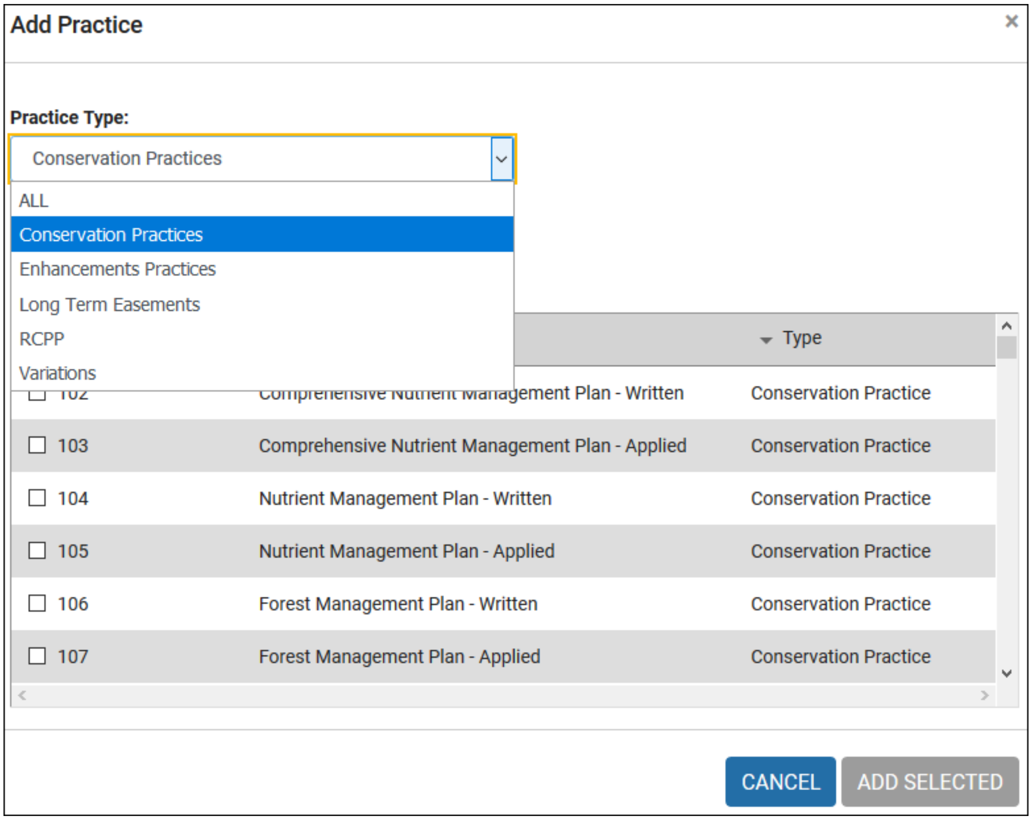
Note: *Any Planned Practices that have been added to the land unit in Conservation Desktop display here. Practices with an Alternative status cannot be removed from the land unit in CART.*

4. To add a draft Planned Practice, select the **ADD PRACTICE** button.

5. The **Add Practice** dialog box displays.

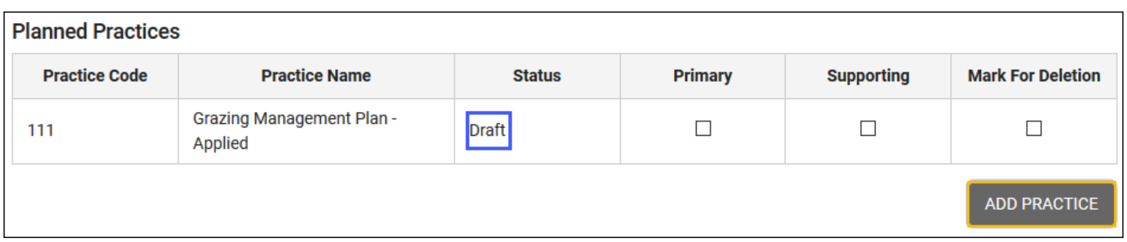


6. In the **Practice Type** drop down, select a type such as **Conservation Practices**.



7. Filter and narrow your Planned Practices search by filling in the **Search Practices** text box. You can search Planned Practices by both **Practice Name** and **Practice Code**.

8. Select the checkbox for the practice, then select **Add Selected**. In this example **111 – Grazing Management Plan - Applied** is added to the Planned Practices for the selected land unit. The practice status is displayed as **Draft**.

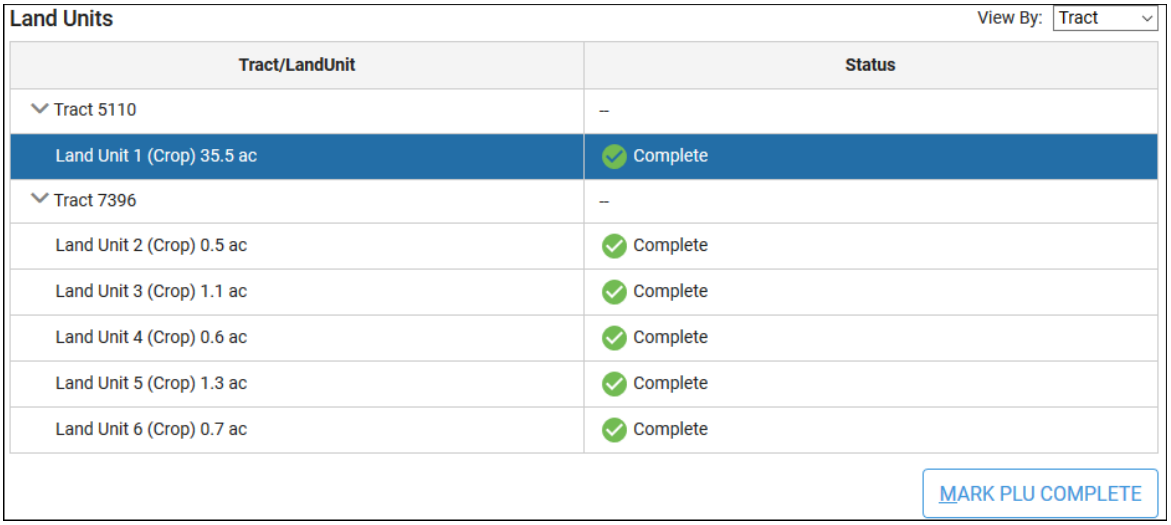


9. Repeat adding practices by searching and adding each practice by name, or by practice code, until complete.

10. Mark each practice **Primary** or **Supporting,** then select **MARK PLU COMPLETE**. Only Primary practices apply points.

Note: *You can **MARK PLU COMPLETE** after practices have been added to each land unit or after all practices have been added to all land units. See Appendix A if you add a practice to a land unit after marking the land units complete.*

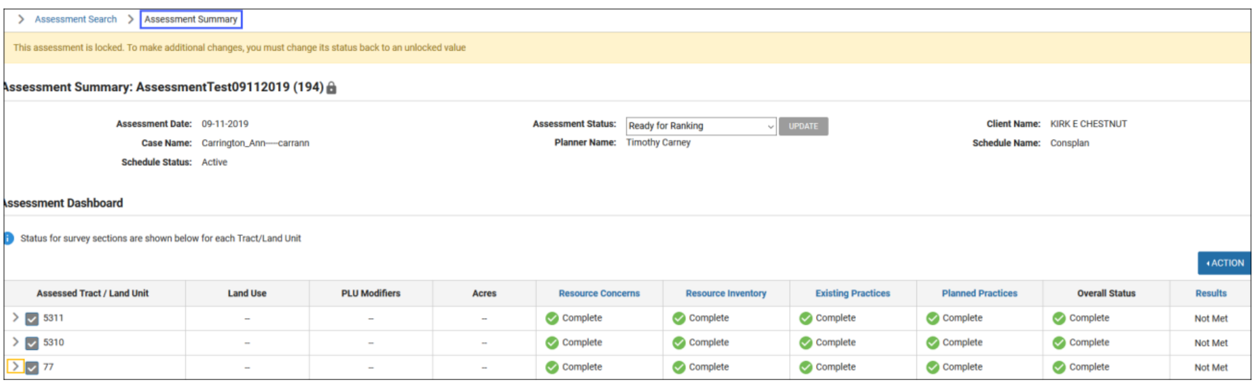
11. The Practices will be validated as “**Complete**” with a green checkmark.



12. Click **SAVE**.

    A confirmation dialog displays verifying that the information was saved successfully. To exit, select **Close**.

13. To return to the **Assessment Summary** page, click on **Assessment Summary** in the breadcrumbs at the top of the page.



> **Note:** *Once the overall status of the assessment is complete, the assessment is in a locked state. To make additional changes, you must change the status back to an unlocked state.*

1.6.3.2 View Assessment Results

The planner can view the results page of an assessment at any time. Once the planner has completed the Resource Concerns, Resource Inventory, Existing Practices, and Planned Practices information, they can view the completed Plan Rollup Assessment Results in a table (default) or (coming soon!) graph view. The planner can also view assessment results for each individual land unit in a table or graph view.

1. Select **Results** from the **Assessment Summary** page.

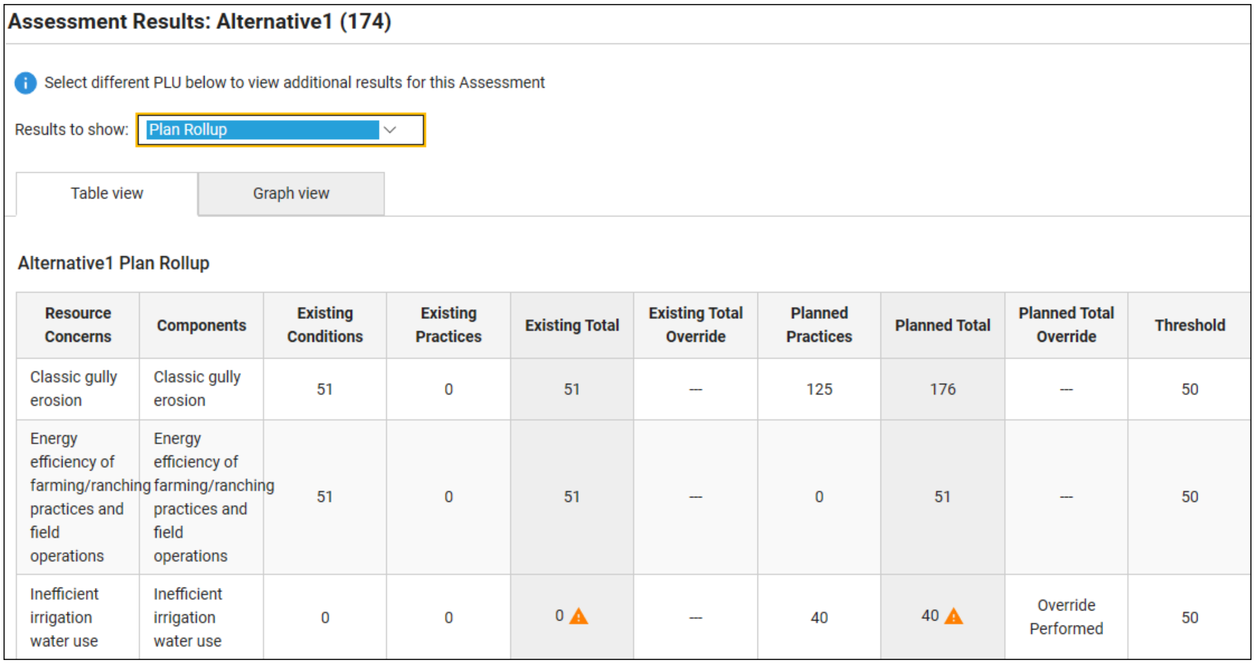
2. The Assessment Results page defaults to the **Plan Rollup** results in the **Table View**. The following information explains how to interpret the information in the columns:

Screen Name	Description
Resource Concerns	The resource concerns identified in the assessment and their components are listed in the two left-hand columns on the results table.
Components	The components column is a subset of the resource concern.
Existing Conditions	The existing conditions column represents the pre-planning condition of the planning area for each resource concern. These points are derived based on answers to the resource inventory questions.
Existing Practices	The existing practices column scores the existing (Historical and Observed) practices on the planning area for each resource concern.
Existing Total	The existing total is the "as is" score that is the sum of the existing condition and existing practices values.
Existing Total Override	The **Existing Total Override** denotes whether a planner override has been used or not for the **Existing Total**. For the override to be marked at the plan rollup level, the override must be denoted on every applicable land unit for the same resource concern component. The result displayed at the **Plan Rollup** level is **Override Performed**. If any override is met at the Planned Land Unit (PLU) level, the result is **Overriden to Met**. If the override at the PLU level is not met, the result displayed is **Overriden to Not Met**.
Planned Practices	The planned practices column scores the value that the practices recommended for implementation will have to help achieve target-level resource conservation for each resource concern identified. Primary planned practices include points. Supporting practices do not include points, but do provide support for primary practices.
Planned Total	The existing total and planned total practice scores are summed to provide the Plan Total in CART.
Planned Total Override	The **Plan Total Override** denotes whether a planner override has been used or not for the **Planned Total**. For the override to be marked at the plan rollup level, the override must be denoted on every applicable land unit for the same resource component. The result displayed at the **Plan Rollup** level is **Override Performed.** If all resource concern components are met at the Planned Land Unit (PLU) level, the result is **Overriden to Met**. If any of the resource concern components are not met at the PLU level, the result displayed is **Overriden to Not Met**.
Threshold	The threshold values represent the numeric effort needed to attain a target-level of resource conservation for each of the identified resource concerns using conservation management and conservation practices. Static threshold values are set at 50, but this can differ for dynamic/geospatial thresholds.

3. At the top of the page, select the **Results to show** drop-down list to view the results for each individual land unit.

> **Note:** *CART will flag the score when the **Existing Total** and/or **Planned Total** scores are below the threshold for each Resource Concern. The planner can choose to create an override if they believe actual field observations meet the resource concern conditions. The planner may wish to override the assessment results, either because the tool says that the land unit passed a resource concern and the planner has identified, by observation or other assessment method, that it should not, or vice versa where the land unit does not pass a resource concern in CART but the planner has determined that it should pass. An **Existing Total Override** cannot be performed on a land unit if the existing conditions are locked because a related plan, who shares this data, has*

*moved to Ranking status. A **Planned Total Override** can be updated on a locked land unit. Neither the **Existing Total Override** nor the **Planned Total Override** can be changed once the assessment is locked.*



Assessment Results: Alternative1 (174)

Select different PLU below to view additional results for this Assessment

Results to show: Plan Rollup

Table view | Graph view

Alternative1 Plan Rollup

Resource Concerns	Components	Existing Conditions	Existing Practices	Existing Total	Existing Total Override	Planned Practices	Planned Total	Planned Total Override	Threshold
Classic gully erosion	Classic gully erosion	51	0	51	—	125	176	—	50
Energy efficiency of farming/ranching practices and field operations	Energy efficiency of farming/ranching practices and field operations	51	0	51	—	0	51	—	50
Inefficient irrigation water use	Inefficient irrigation water use	0	0	0 ⚠	—	40	40 ⚠	Override Performed	50

Coming soon! The graph is another way to view the **Plan Rollup** and individual land unit results. Click on the **Graph view** tab to open the graph. Click on the **Table view** tab to return to the default view.

Coming soon! The **Graph view** displays a rollup of the planned land units where the x-axis represents points and the y-axis represents the resource concern categories. The graph displays one bar for every resource concern category identified in the assessment. Each bar will have three segments representing an average and normalized data set for **Existing Conditions**, **Existing Practices**, and **Planned Practices**. The **Threshold** line is also normalized to match the resource concerns category data, respectively.

Override text at the resource concern land unit level will display **Overridden to Met**, or **Overridden to Not Met**. Override text at the **Plan Rollup** level displays **Override Performed**.

4. Select a Land Unit to display the specific **Resource Concerns** and scores for just that land unit.

   If the **Existing Total** and/or **Planned Total** scores are below the threshold for a resource concern for the selected land unit, a warning icon displays to the right of the score. In this case, planners have the ability to create an override for both **Existing Total** and **Planned Total** scores for a given resource concern. Using the planner override, the planner can identify through observation or other assessment method that planning criteria has, or has not, been met and may be outside or improperly recognized using the streamlined CART questions, information, and analysis framework designed to capture typical conditions. The override ***will not*** change the point values in CART or influence an assessment going to ranking, but it will designate that an override was determined. The overrides assist with gathering data to review the assessment process and override patterns on a resource concern could point to a need to update the assessment methodology or geospatial data. Planners are required to select a reason(s) and provide a comment on why an override is needed.

5. When **Plan Rollup** is selected in the **Results to show** field and there is a resource concern present for all land units, optionally the planner may decide to perform an override for that resource concern for either the **Existing Total** and/or **Planned Total** if they feel the software results are not in alignment with a field survey. If the planner does an override, the status displays **Override Performed** at the **Plan Rollup** level.

When an individual **Land Unit** is selected in the **Results to show** field, the resource concern components displayed on the table can be **Overridden to Met or Overridden to Not Met** for that land unit. The override can be done on:

- The Existing Total, or,
- The Planned Total

Note: *When there are overrides on both the **Existing Total** and the **Planned Total**, the override on the **Planned Total** takes precedence. The land unit status is set to either **Met** or **Not Met** based on the **Planned Total** override.*

Results to show: Land Unit 1 Tract 8826 (Not Met)

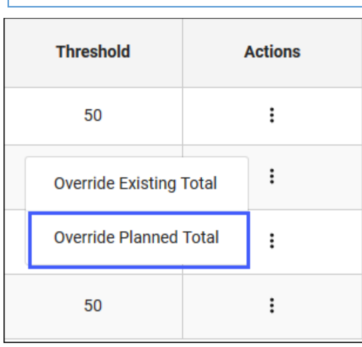
Table view | Graph view

Results for Land Unit 1 (Tract 8826)

Resource Concerns	Components	Existing Conditions	Existing Practices	Existing Total	Existing Total Override	Planned Practices	Planned Total	Planned Total Override
Energy efficiency of farming/ranching practices and field operations	Energy efficiency of farming/ranching practices and field operations	51	0	51	—	0	51	—
Objectionable odor	Odor - confined animal activities	0	0	0 ⚠	—	0	0 ⚠	Overridden to Met
	Odor - nitrogen fertilizer	51	0	51	—	0	51	—
Sheet and rill erosion	Sheet and rill erosion	0	0	0 ⚠	—	0	0 ⚠	Overridden to Met

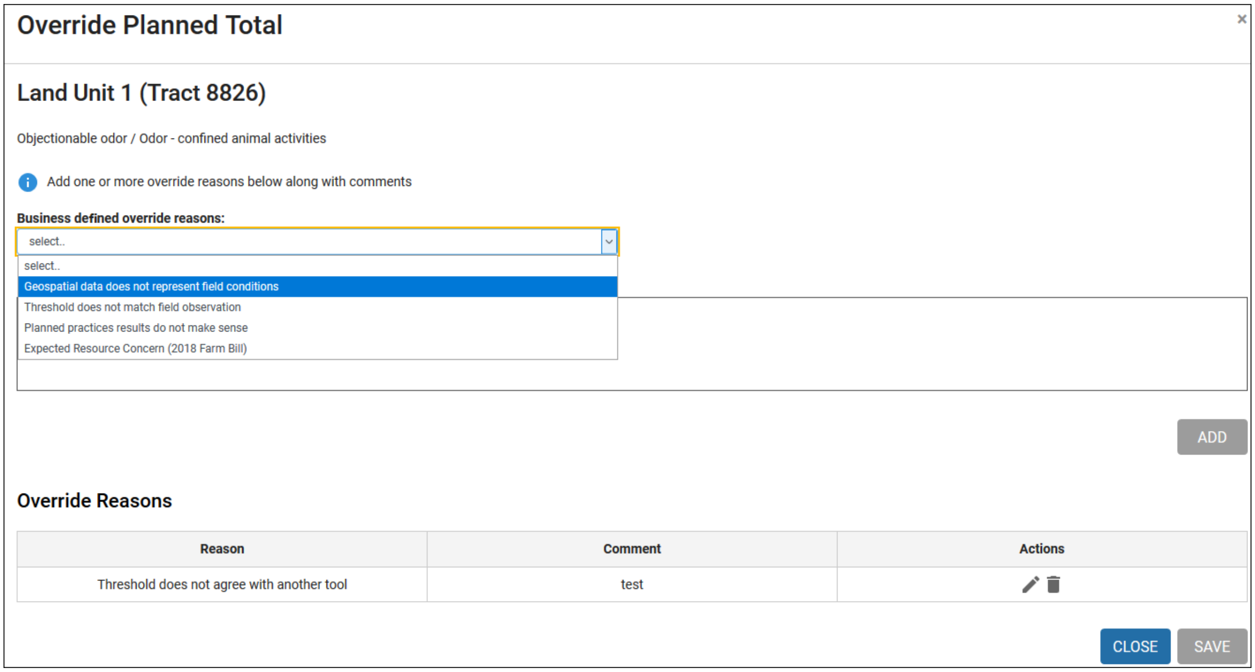
a. To create an override, select **Override Planned Total** from the **Actions** menu.

Note: *The planner should only create an override when no additional changes are planned and the assessment is complete. Create the override before the assessment is moved to **Rank** status.*



b. Select a pre-defined reason(s) for the override.

c. Type a comment (required) in the text field. A comment is required in order to continue with the override workflow.



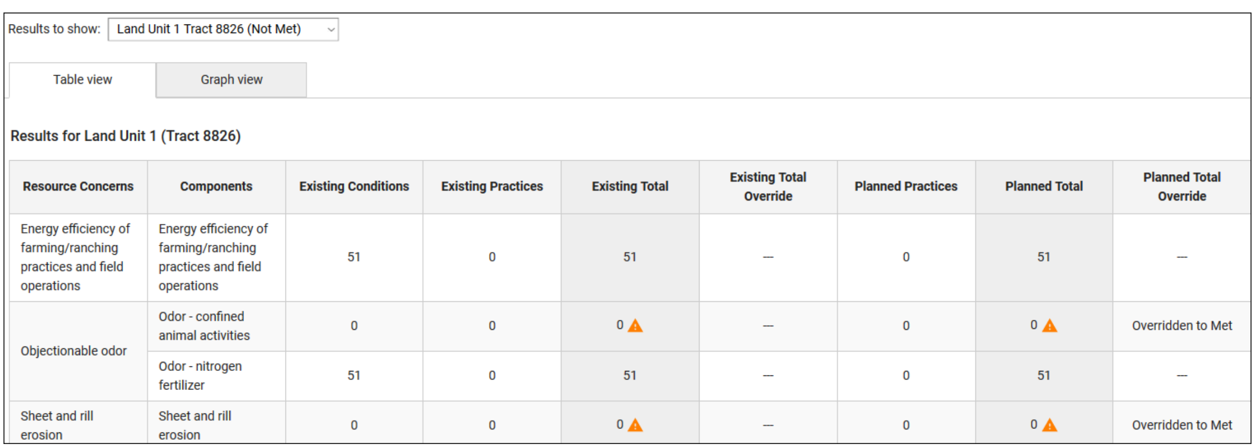
d. Click the **ADD** button. If you need to edit a comment or delete the entire reason including the comment, you can select either one from the **Actions** menu before saving your changes.

Note: *While more than one reason can be selected for an override, the same reason cannot be selected twice. Therefore, use the* ***Comment*** *box to edit comments and provide further explanation, if needed.*

e. If necessary, also complete the override for **Override Existing Total** by following the same steps in a-d, except select **Override Existing Total** from the **Actions** menu in step a.

f. When finished, click the **SAVE** button.

g. On the **Assessment Results** page, note that the **Planned Total Override** column now lists **Overridden to Met**.

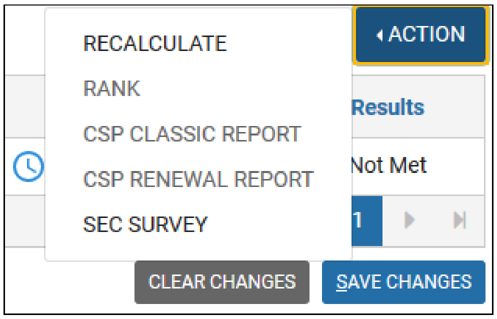


Resource Concerns	Components	Existing Conditions	Existing Practices	Existing Total	Existing Total Override	Planned Practices	Planned Total	Planned Total Override
Energy efficiency of farming/ranching practices and field operations	Energy efficiency of farming/ranching practices and field operations	51	0	51	—	0	51	—
Objectionable odor	Odor - confined animal activities	0	0	0	—	0	0	Overridden to Met
	Odor - nitrogen fertilizer	51	0	51	—	0	51	—
Sheet and rill erosion	Sheet and rill erosion	0	0	0	—	0	0	Overridden to Met

6. After reviewing the results, navigate back to the **Assessment Summary** page. If you wish to make any changes to the assessment, go to the applicable tab to make them now. Be aware that changing the land use for the currently selected resource concerns may require you to re-enter the resource concerns and inventory answers as they may not be applicable to the new land use.

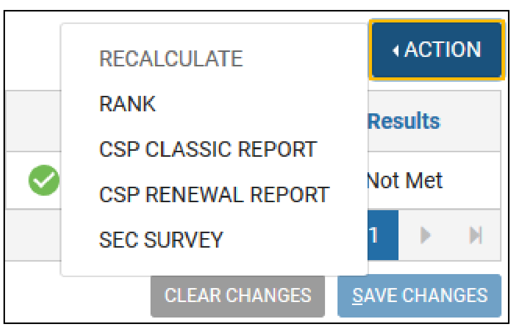
   If you do not need to make changes, proceed to the next step.

7. Under the **Actions** button on the **Assessment Summary** page, select **RECALCULATE**.



8. Return to the **Assessment Results** page to review your changes.

   To see results in more detail, go back to the **Assessment Summary** page, then click the **ACTION** button and select the **CSP Classic** or **CSP Renewal Report**. See [CSP Report] for more information. Optionally, you may also access the **Special Concerns Survey (SEC)** from the **ACTION** button after that feature is available.



9. When satisfied with the assessment results and the assessment report is finalized, select **Ready for Ranking** under the **Assessment Status** and then select **Update**.

10. Select **RANK** under the **Action** button to submit the assessment for ranking.

> **Note:** *To complete the planning process, eventually any practices with the status of "Draft" created on land units during the Assessment process will need to be digitized using the Edit Practices dialog box in Conservation Desktop. The Edit Practices dialog box in CD allows the user to select a "Draft" practice, digitize the practice and assign attributes such as planned date, planned amount, and a narrative.*

1.7 Ranking an Assessment

The ranking tool portion of CART assists in determining eligibility for and ranking within a given funding pool or pools. This tool allows states to identify the resource concerns and conservation practices for specific land uses.

Thresholds represent the amount of conservation effort needed to achieve planning criteria for a given resource concern, assuming no management or treatment is presently applied. A threshold is a relative number, not an absolute number. A high threshold indicates that the site has a higher intrinsic risk of a resource problem and is likely to need higher levels of treatment. This higher need could already be addressed by existing management, so the threshold by itself does not reflect the actual existing site conditions.

For a given resource concern, CART establishes a site vulnerability and a planned practice score. Site vulnerability is determined by subtracting the existing condition and existing practice scores from the thresholds. The planned practice score is based on the sum of the planned practice on that PLU, which addresses the resource concern. These two scores are weighted by a ranking pool to address the resources concerns prioritized by that ranking pool. Note that the overall ranking score includes additional local and state resource concerns.

During the ranking process, an assessment can be in several different states. If an assessment is in a **Locked** state, the State Program has pre-approved the assessment in the ranking pool, or it has approved the contract in the ProTracts application. The user cannot change this status unless the State Program Manager deselects or removes the **Pre-Approval** status.

If an assessment is in an unlocked state, a user can edit the details in any status that is not **Pre-Approved-Submitted** or **Approved**. If **Submitted**, but not **Pre-Approved** a user can edit details and the system sets the status to **In Progress**.

To rank an assessment, complete the following steps

1. Click the **Assessment** menu item.
2. From the **Assessment Search** screen, select the **State** and **Service Center** for the assessment the user plans to rank, then click **SEARCH**.
3. Click the assessment the user wants to rank in the **Assessment** column, then wait for that assessment to load.
4. If the **Assessment Status** is **In Assessment**, select **Ready for Ranking** from the **Assessment Status** drop-down menu, then click **UPDATE**. The assessment recalculates, then the assessment reloads.

   Note: *The recalculate process might take some time to complete.*

   Note: *The user might see a message showing that the assessment is now updated with changes from CD and is now locked. The status should change to* ***Ready for Ranking****.*

Note the following **Assessment Status** definitions:

- In Assessment: A planner initiated an assessment for this Practice Schedule.

- Discarded: A planner changed the status of this assessment to **Discarded** to indicate that this assessment will not be moving forward in the ranking process.
- Ready for Ranking: A planner changed the status of this assessment to **Ready for Ranking**. This means this assessment can now be ranked within any applicable ranking pools. Note that the practice schedule cannot be edited within CD. The planner can change the status back to **In Assessment** so that changes can be made to the practice schedule.
- Awaiting Decision: This assessment has been ranked, as in that the **Ranking Status** is set to **Complete** in one or more ranking pools and is waiting for a State Program Manager to make a funding decision.

5. Click **Action > Rank** to load the applicable ranking pools the user can use for ranking this assessment. The **Applicable Ranking Pools** page loads shows the ranking pools for which this assessment is qualified.

   Note: *An error message is displayed if no applicable or matching ranking pools are found.*

6. For a **Pool Name** the user wants to use to do the ranking, select the **Actions > Answer Survey Questions** from the **Actions** menu. Look for the **Answer Survey Questions Page** to appear.

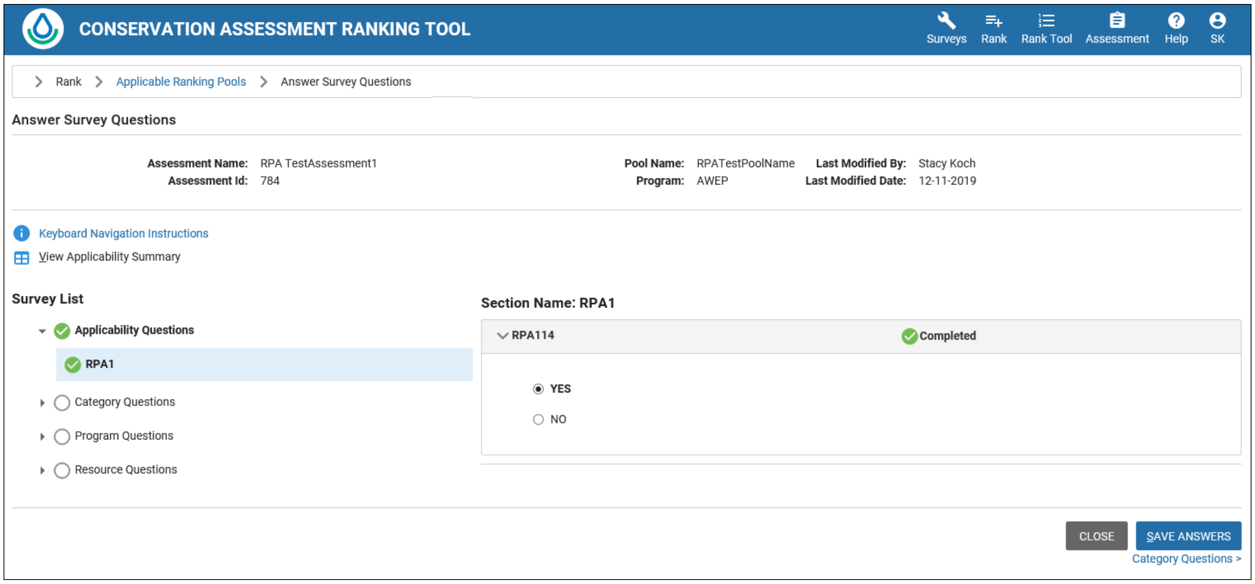
   Note: *The user can only answer survey questions if the **Ranking Status** is **Draft** or **In Progress**.*

7. Expand the **Applicability Questions Survey List**.
8. Click the section contained in the **Applicability Questions Survey List.**
   a. Expand the survey question, if it is not already expanded.
   b. Answer the **Applicability Questions** survey question.

   Note: *The section consists of one question that is either a **Text** or a **Geospatial** type question. The user can answer **Text** question types. The system answers all **Geospatial** question types and they are displayed as read-only.*

   Note: *After a user answers the **Applicability Questions**, the **Ranking Status** changes to **In Progress**.*

9. Click **SAVE ANSWERS** after answering the **Applicability Questions** survey question. If the user answers this question with a positive response, the remaining **Survey Lists** become expandable.



Note: *The user can click **SAVE ANSWERS** or **CLOSE** at any time.*

Note: *The user can click **CLOSE** and follow the interactive instructions to close the page without saving the selections.*

Note: *If the user does not answer the **Applicability Question**, or answers with a negative response, the user will not be able to expand the remaining **Survey Lists**.*

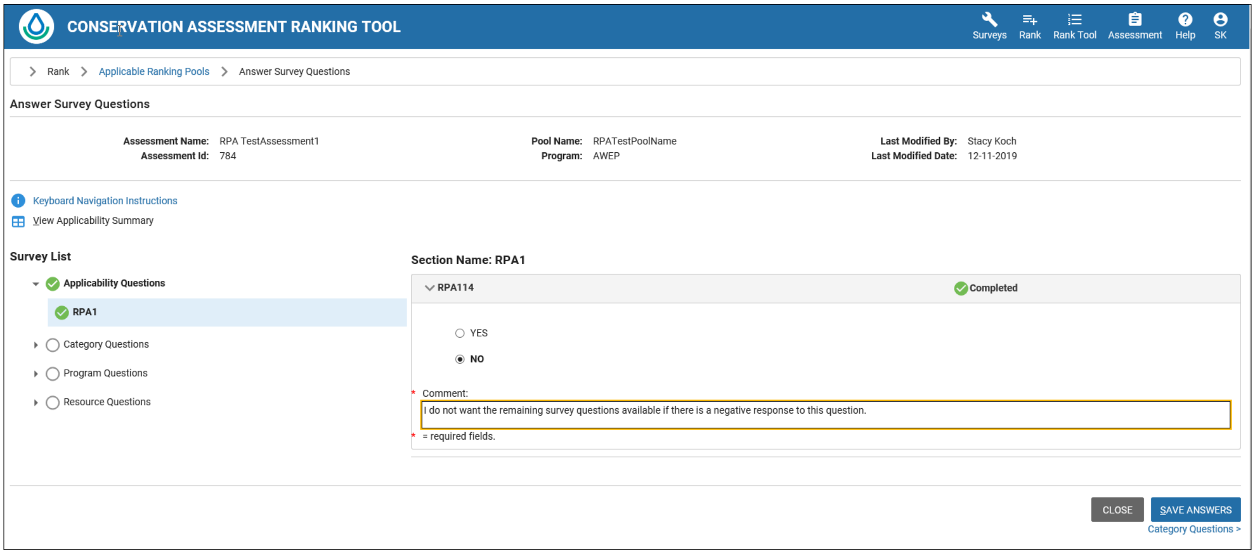
Note: *The answer to the question in the **Applicability Questions** section does not affect the ranking score.*

Note: *There is a navigation link beneath the **SAVE ANSWERS** button as shown in the above diagram. Use that link throughout these instructions to move to the previous or next **Survey List** section.*

10. Skip this step if the user answered the **Applicability Question** with a positive response. The user can use this example to answer the **Applicability Question** with a negative response.
    a. In the following example, the user answers the **Applicability Question** with a negative response.
    b. When the user selects a negative response, the user is prompted to enter a comment. The user must enter a comment before being allowed to save the changes.
    c. After the user enters a comment, explaining the reason for the negative response, then clicks **SAVE ANSWERS** and follows the interactive instructions, the remaining **Survey List** items are not expandable.

d. The user can click **CLOSE** and follow the interactive instructions to close the page without saving the selections.

Note: *The user can click **CLOSE** any time during these steps to close the page without saving your selections.*



Note: *If the user chooses to answer the **Applicability Question** with a negative response, steps 11-17 shown below will be irrelevant, as the user will not be able to expand the remaining **Survey Lists**.*

11. After the **Category Questions Survey List** becomes available, expand the **Category Questions Survey List**.
12. Click the section contained in the **Category Questions Survey List.**
    a. Expand the survey question, if it is not already expanded.
    b. Answer the survey question.

Note: *The section consists of one question that is either a **Text** or a **Geospatial** type question. The user can answer **Text** question types. The system answers all **Geospatial** question types and they are displayed as read-only.*

Note: *The user can click **SAVE ANSWERS** or **CLOSE** at any time.*

Note: *The answer to the question in the **Category Questions** section does not affect the ranking score.*

13. After the **Program Questions Survey List** becomes available, expand the **Program Questions Survey List**. Note that there might be multiple survey questions in this section.
14. For each section, click the section, then do the following:
    a. Expand the survey question, if it is not already expanded.

b. Answer the survey question.

Note: *These sections consist of questions that are either **Text** or **Geospatial** type questions. The user can answer **Text** question types. The system answers all **Geospatial** question types and they are displayed as read-only.*

Note: *The user can click **SAVE ANSWERS** or **CLOSE** at any time.*

Note: *Answers to these questions affect the ranking score.*

15. After the **Resource Questions Survey List** becomes available, expand the **Resource Questions Survey List**. Note that there might be multiple survey questions in this section.

16. For each section, click the section, then do the following:

    a. Expand the survey question, if it is not already expanded.

    b. Answer the survey question.

Note: *These sections consist of questions that are either **Text** or **Geospatial** type questions. The user can answer **Text** question types. The system answers all **Geospatial** question types and they are displayed as read-only.*

Note: *The user can click **SAVE ANSWERS** or **CLOSE** at any time.*

Note: *Answers to these questions affect the ranking score.*

17. Click **SAVE ANSWERS** when the user is finished with this section.

Note: *Clicking **SAVE ANSWERS** recalculates the ranking score.*

18. Click **CLOSE**.

19. To change the status of this **Ranking Pool** from **In Progress** to **Complete**, use the **Ranking Status** drop-down menu for this **Ranking Pool** to set the status to **Complete**.

20. See the Applicability Details section to review the ranking results for a ranking pool.

To view the applicability details for a ranking pool, complete the following steps

1. Click the **Assessment** menu item.

2. From the **Assessment Search** screen, select the **State** and **Service Center** for the assessment the user plans to view, then click **SEARCH**.

3. Click the assessment the user wants to view in the **Assessment** column, then wait for that assessment to load.

4. Click **Action > Rank** to load the **Applicable Ranking Pools** the user can use for viewing the pools available to rank its assessment.

   Use the definitions in the following table to understand this information.

Note: *The information listed in the following table is shown in the order it appears in the UI.*

Data	Definition
Assessment Date	The date that the Assessment was created in Conservation Desktop (CD).

Data	Definition
Assessment ID	The identifier for the assessment.
Assessment Status	Note the **following Assessment** Status definitions:
Client Name	This value is ported from CD.
Case Name	This value matches the CD Case file name.
Planner Name	The name of the planner logged into CART.
Schedule Name	This name defaults to the Practice Schedule name for this assessment.
Schedule Status	This status is either **Alternative** or **Active** and is ported from CD.
Last Modified By	The name of the person that completed the last modification for this assessment.
Last Modified Date	The date the last modification was made for this assessment.
Pool Name	This value is the name of the ranking pool for this assessment.
Category	The Display Group Category is either automatically determined geospatially or manually answered by the user for this Display Group.
Program	The identifier for the associated program.
Number of Applicable Land Units	The number of land units to be included in the applicable ranking pool.
Total Land Units	The number of Land Units to be included in the applicable ranking pool.
Summary Total Ranking Score	This score is automatically determined and includes the manually entered ranking data. This data is adjusted by the **Ranking Pool Ranking Weights**.
Application Date	The date that the application was started.
Application Number	The application number assigned to the application.
Estimated Cost	The estimated cost associated with the applicable ranking pool.
Submitted Date	The submission date of the application.
Ranking Status	▪ Draft: An automatic process determined that the assessment/practice is applicable to the ranking pool. ▪ In Progress: A planner has initiated the ranking process by answering the first survey question and saving the answer. ▪ Completed: A planner has completed answering the necessary ranking question and all the necessary ranking scores have been calculated. ▪ Submitted: A planner has determined that the practice schedule is ready for the State Program Manager to make a funding determination. The **Application Date**, **Application Number**, and **Estimated Cost** fields must be populated on the **Applicable Ranking Pool Fields** page for this status. Note that the planner can set the **Ranking Status** after it has a **Complete** value. ▪ Preapproved: A status change to **Preapproved** was received from the Selects Agreement tool and processed. The **Preapproved** status can be changed back to **Submitted** by initiating a status change from the Selection Agreement tool. ▪ Approved (Protracts or Easement Agreement Type)
Actions	The action you want to take for a specific pool. For example, you might want to **View Applicability Details** or **Answer Survey Questions**. To be able to answer survey questions, the **Ranking Status** must be **Draft**, **In Progress**, or **PreApproved**.

5. To view the applicability details for a ranking pool, click **View Applicability Details** in the **Actions** menu for a **Pool Name**.

Use the definitions in the following table to understand this information.

Note: *The information listed in the following table is shown in the order it appears in the UI.*

Display Table	Information Label	Definition
<Pool Name>	Pool Name	The name for the ranking pool.
	Category	The Display Group Category is either automatically determined geospatially or manually answered by the user for this Display Group.
	Program	The identifier for the associated program.
	Applicable Land Units	The Land Units to be included in the applicable ranking pool.
	Total Land Units	The number of Land Units to be included in the applicable ranking pool.
	Summary Total Ranking Score	This score is automatically determined and includes the manually entered ranking data. This data is adjusted by the **Ranking Pool Ranking Weights**.
	Application Date	The date that the application was started.
	Application Number	The application number assigned to the application.
	Estimated Cost	The estimated cost associated with the applicable ranking pool.
	Submitted Date	The submission date of the application.
	Ranking Status	▪ Draft: An automatic process determined that the assessment/practice is applicable to the ranking pool. ▪ In Progress: A planner has initiated the ranking process by answering the first survey question and saving the answer. ▪ Completed: A planner has completed answering the necessary ranking question and all the necessary ranking scores have been calculated. ▪ Submitted: A planner has determined that the practice schedule is ready for the State Program Manager to make a funding determination. The **Application Date**, **Application Number**, and **Estimated Cost** fields must be populated on the **Applicable Ranking Pool Fields** page for this status. Note that the planner can set the **Ranking Status** after it has a **Complete** value. ▪ Preapproved: Status change from an integration with the Selection Agreement Tool. ▪ Approved (Protracts or Easement Agreement Type)
	User Actionable Ranking Status	The following statuses require user input for justification: ▪ Not Applicable: The user determined that the ranking pool is not applicable, based on knowledge of the Practice Schedule and the ranking pool. A prompt for a justification appears after a ranking pool is determined to be **Not Applicable.** ▪ Customer Declined: The customer decided not to proceed with this ranking pool. The user must enter a text reason for the cancellation. ▪ Cancelled: Practices are selected and pre-approved, however, the customer requested cancellation. To change the status from **Preapproved** to **Cancelled**, a status change from the Selection Agreement Tool is required. ▪ User Declined: The user determined that a ranking pool should be **Declined**. For example, the geospatial applicability is met, yet the user determined that applicable practices are missing. A prompt for justification appears after a ranking pool is **Declined**.
Applicable Land Units in Ranking Pool	Tract	The tract number of the land unit or units used for this ranking pool.
	Land Unit	The **Land Unit** or **Land Units** used for this ranking pool.
	Land Use	The **Land Use** designated for a **Land Unit**.
	Modifier	The modifier for a **Land Unit's Land Use**.

Display Table	Information Label	Definition
	Included	Indicates if the assessment land unit is to be included in the applicable ranking pool.
	Excluded	Indicates if the assessment land unit is to be excluded from the applicable ranking pool.
Practices	Practice Name	The **Practice Name** of the practice or practices being used in the applicable ranking pool.
	Practice Code	The **Practice Code** of the practice or practices being used in the applicable ranking pool.
	Included	Indicates if the practice is to be included in the applicable ranking pool.
	Excluded	Indicates if the practice is to be excluded from the applicable ranking pool.
	Supporting Practice	These practices support the primary **Planned Practices**.
Resource Concerns	Resource Concern Name	The name of each resource concern for **Land Units** used in the applicable ranking pool.
	Included	Indicates if the **Resource Concern** is to be included in the applicable ranking pool.
	Excluded	Indicates if the **Resource Concern** is to be excluded from the applicable ranking pool.
Ranked Evaluation – Questions, Answers, Points		
Applicability	Question	A question that affects the applicability of the ranking pool for a Practice Schedule.
	Answer	An answer that affects the applicability of the ranking pool for a Practice Schedule.
Category	Question	A **Category** question used in the applicable ranking pool.
	Answer	The answer to a **Category** question used in the applicable ranking pool.
Resource Priorities	Question	A **Resource Priorities** question used in the applicable ranking pool.
	Answer	The answer to a **Resource Priorities** question used in the applicable ranking pool.
	Points	The number of points from an answer to a **Resource Priorities** question used in the applicable ranking pool.
Program Priorities	Question	A **Program Priorities** question used in the applicable ranking pool.
	Answer	The answer to a **Program Priorities** question used in the applicable ranking pool.
	Points	The number of points from an answer to a **Program Priorities** question used in the applicable ranking pool.
Ranking Component Scores	Vulnerability	The **Vulnerability** score for a **Practice Schedule** is based upon the assessment scores for the applicable ranking pool **Resource Concerns.**
	Planned Practice Effects	Planned Practice Effects Ranking Component Score for a Practice Schedule based upon assessment scores.

Display Table	Information Label	Definition
	Resource Concern Priorities	Resource Priority Ranking Component Preliminary Ranking Score for a Practice Schedule based upon programmatically answered Resource Questions.
	Program Priorities	Program Priorities Ranking Component Preliminary Ranking Score for a Practice Schedule based upon programmatically answered Resource Questions.
	Efficiency	Efficiency Ranking Component score for a Practice Schedule based upon Average practice cost data for planned practices applicable to a ranking pool.
	Ranking Score	The **Ranking Score** for this applicable ranking pool.
	Component Weight	The relative result for this applicable ranking pool.
	Score	The relative score for this applicable ranking pool.

1.8 Finalizing the Ranking and Submitting it for Selection

The user might need to finalize the ranking for either a Protracts or non-Protracts program. After completing that task, the user can then submit the applicable ranking pool for selection.

To finalize the ranking and submit the ranking pool for selection, complete the following steps:

1. Click the **Assessment** menu item.
2. From the **Assessment Search** screen, select the **State** and **Service Center** for the assessment the user plans to view, then click **SEARCH**.
3. Click the assessment the user wants to view in the **Assessment** column, then wait for that assessment to load.
4. Click **Action > Rank** to load the **Applicable Ranking Pools** the user can use for viewing the pools available to rank its assessment.
5. To add an application number to a specific ranking **Pool Name**, select **Click to Add** in the **Application Number** column for the **Pool Name** you want to submit for selection. Note that, in some cases, you can modify an existing **Application Number** by clicking on an existing assigned **Application Number**.
6. To add an **Estimated Cost**, click the link in the **Estimated Cost** column for the **Pool Name** you want to submit for selection.
7. After the **Enter Estimated Cost** pop-up menu appears, enter the estimate cost, then click **SAVE**.

   Note: *The user is warned if a value exceeds that maximum allowed value.*

   Note: *If the user does not set a value for the **Estimated Cost**, the **Ranking Status** cannot be set to **Submitted**.*

8. To change the status of this **Ranking Pool** to **Submitted**, use the **Ranking Status** drop-down menu. For this **Ranking Pool**, set the status to **Submitted**.

The user just finalized the ranking and submitted the ranking pool for selection.

1.9 Finalizing the Ranking for a Split Program

This functionality will be available at a future release.

1. Click the menu item.
2. From the screen, select the and for the assessment the user plans to view, then click .
3. Click the assessment the user wants to view in the column, then wait for that assessment to load.
4. Click to load the the user can use for viewing the pools available to rank its assessment.
5. To add an application number to a specific ranking , select in the column for theyou want to submit for selection. Note that, in some cases, you can modify an existing by clicking on an existing assigned .
6. After the dialog box appears, use the pull-down menu to select the application number you want assigned to the , then click .
7. The link to the application number now appears in the column for that**Changing an Assessment Status**

To make changes to an existing assessment, a user might need to change the assessment's status from a locked value, say **Ready for Ranking**, to an unlocked value, such as **In Assessment**.

To change an assessment status from Ready for Ranking to In Assessment, complete the following steps:

1. Click the **Assessment** menu item.
2. From the **Assessment Search** screen, select the **State** and **Service Center** for the assessment the user plans to view, then click **SEARCH**.
3. Review the assessments and find one that has a status of **Ready for Ranking** that you want to change to **In Assessment**.
4. Click the link in the **Assessment** column for the assessment you found in the previous step. The **Assessment Summary** screen appears.

   Note: *The user should see a message explaining that the assessment is locked, and that its status must be changed to an unlocked value to make changes.*

5. Using the **Assessment Status** drop-down menu, select **In Assessment**, then click **UPDATE**.
6. After a pop-up window appears asking you to confirm the change, click **YES** to remove the applicable ranking pools from the assessment.

   Note: *The assessment information reloads after initiating this status change.*

The assessment status for this assessment should now show as **In Assessment**.

1.11 Funds Manager

For information about Funds Manager, see *Funds Manager* in the *Conservation Desktop Comprehensive User's Manual*.

Appendix A. CART Known Issues and Resolutions

1.12 Adding a Practice to a Land Unit in CD after Marking a Land Unit Complete in CART

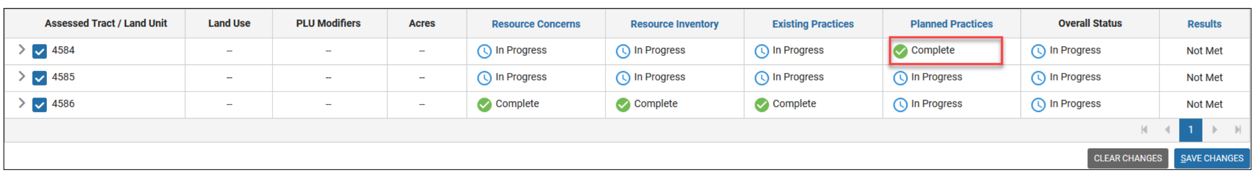
If the user decides to add a practice to a land unit in CD after marking the land unit complete in CART, they will need to return to CART and complete the Planned Practices section of the assessment by marking this newly added practice as primary/supporting. This is required in order for the assessment to have the correct scores.

Follow these steps in CART after adding a practice to a land unit in CD:

1. Open the CART application, then return to the **Assessment Summary** page for the assessment that contains the new practice.

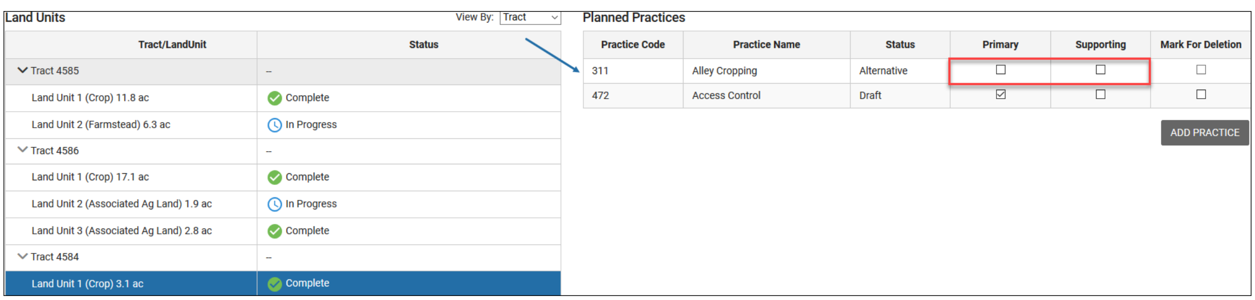
   > **Note:** *If you already have an instance of the CART application open to the assessment that contains the new practice, you will need to refresh the page by returning to the **Assessment Summary** page and then back to the **Planned Practices** page.*

2. Under **Planned Practices**, the status of the affected land unit is **Complete**. Click on **Planned Practices**.



Assessed Tract / Land Unit	Land Use	PLU Modifiers	Acres	Resource Concerns	Resource Inventory	Existing Practices	Planned Practices	Overall Status	Results
4584	–	–	–	In Progress	In Progress	In Progress	Complete	In Progress	Not Met
4585	–	–	–	In Progress	In Progress	In Progress	In Progress	In Progress	Not Met
4586	–	–	–	Complete	Complete	Complete	In Progress	In Progress	Not Met

3. Expand the tract to find the land unit with the new practice. Select the land unit.
4. Click **Primary** or **Supporting**, or both, for the new practice.



Tract/LandUnit	Status
Tract 4585	–
Land Unit 1 (Crop) 11.8 ac	Complete
Land Unit 2 (Farmstead) 6.3 ac	In Progress
Tract 4586	–
Land Unit 1 (Crop) 17.1 ac	Complete
Land Unit 2 (Associated Ag Land) 1.9 ac	In Progress
Land Unit 3 (Associated Ag Land) 2.8 ac	Complete
Tract 4584	–
Land Unit 1 (Crop) 3.1 ac	Complete

Practice Code	Practice Name	Status	Primary	Supporting	Mark For Deletion
311	Alley Cropping	Alternative	☐	☐	☐
472	Access Control	Draft	☑	☐	☐

5. Click the **MARK PLU COMPLETE** button.
6. Click the **SAVE** button.
7. Return to the **Assessment Summary** page to review the status of the **Planned Practices** column. It should be marked **Complete** for that land unit.

###