

Stand Examiner's Checklist

IFMAP Inventory and Treatment Tracking

- 1. Compartment boundary (Ch.2)** (*Template 1_20xx YOE Compartment Boundary Verification*)
 - a. review preliminary boundary ("Compartments" layer) in the GDSE
 - o check RAD Tools, LIS, courthouse, etc. to verify ownership
 - o compare boundary to line evidence on imagery, known corners, etc
 - o GPS corners in field if necessary
 - b. corrections via annotated .mxd file in GDSE to RAU (or shadow session), repeat as needed
 - c. when good, RAU transfers to Preinventory layer

- 2. Stand delineation (Ch.2 & 16)** (*Template 2_Pre-Inventory Stand Delineation*)
 - a. using *1_Pre-Inventory Toolkit* divide Pre-inventory layer for compartment into stands (select stand; split/island/merge/explode)
 - b. start digitizing known Site Conditions in the Site Condition layer using *7_Site Conditions Toolkit (Ch.16 & appendix O)*
 - c. check forested vs. nonforested in each stand's attributes, enter preliminary nonforested type calls
 - d. enter comments for central reviewer(s) for stands that utilize mapping standards exceptions that aren't obvious
 - e. use Central Review symbol picker symbology for error checks
 - f. review with other divisions
 - g. notify planner when complete for central review/renumbering

- 3. Stage 1 Field Inventory (Ch.5, Ch.6, Ch.7 & Ch.16)**
 - a. prep for field (*Ch.5*): print maps of compartment with Preinventory layer and imagery; copy field data sheets and / or...
Export Imagery and pre-Inventory layer for use with NOMAD/Soloforest
 - b. check out compartment(s) using DISCO (*Ch.6*); send to mobile device for field data collection with IFMAP MOBILE
 - c. field work:
 - o collect stage 1 data (and any quantitative data you need to defend / justify a management decision at compartment review);
 - o inventory Site Conditions (*Ch.16 & appendix O*);
 - o check/correct/modify stand boundaries;
 - d. enter data into DISCO and/or MOBILE (*Ch.6*)
 - e. correct stand geometry in Preinventory layer (*Ch. 7*) (*Template 2_Pre-Inventory Stand Delineation, 1_Pre-Inventory Toolkit*) as needed (maintain matching records with DISCO)

- f. edit Site Condition geometry in Site Conditions layer (*Ch.16 & appendix O*) (*7_Site Conditions Toolkit*)
- g. after all data is collected: Print DISCO Audit Records; ensure DISCO stands match Pre-Inv layer on GDSE
- h. check the compartment back in to the GDSE using DISCO, immediately follow the next step of using the 'Xfer Pre-Inv' tool.
- i. in the GDSE, transfer Preinventory stands to Forested & Non-Forested layers (use "Xfer Pre-Inv" on *1_Preinventory toolkit*)
- j. notify co-managers and others that participate in the Compartment Review process that Stage 1 data is ready to be reviewed
- k. work with RAU to correct roads and other base features on GIS layers

4. Stage 1 Analysis & Creation of AOIs (*Ch.8, Ch.9 & Ch.16*)

- a. analyze stage 1 data for possible AOIs (*Ch.8*) (*Template 3_Decision Support Data & Template 4_Analyzing Stage1 Data*)
 - o consult pre-inventory guidance
 - o use symbol picker choices
 - o check soil types
 - o check MNFI element occurrences
 - o check habitat typing, red pine suitability, GLO land cover
 - o check LTA descriptions
 - o check archaeological records
 - o consult MNFI abstracts
 - o check SCA, HCVA, ERA designations
 - o check previous inventory for Stand Condition = 8 coding that needs to be addressed with new eyes
- b. analyze Site Conditions (*Ch.16 & appendix O*) as needed using the Site Conditions layer and 'Meets Generic Silvicultural Criteria' symbol picker
- c. using *Template 5_Prescribing AOI's and Treatments, 3_Area of Interest Toolkit*, open Management Notes tool (Type = AOI), enter stand examiner name (*Ch. 9*)
- d. preload stands meeting with "yes" or "maybe" for "area of interest?" per stage 1
- e. "edit" each preloaded stand to be an AOI, (Use "AOI - No Stage 2" for no additional data needed)
- f. "add" and attribute any other stands to be AOIs with Management Notes tool which were not preloaded (e.g. Non-forested stands; stands proposed after pre-review or compartment review, etc)
 - o if being nominated or removed as an SCA (or other similar designation), set "Survey Reason" to "Unique Site" or "SCA Removal" and enter an appropriate comment (see *appendix H*)
- g. "Load AOIs" (this creates the AOI shape of the stands listed in the Management Notes Tool)
- h. edit AOI and Site Conditions geometry as needed (split, merge, etc.) (Can do after "Create Treatments" too)

5. Creation of Proposed Treatments (Ch.10 & Ch.16)

- a. use QD data, stage 1 data, or any other info available to decide which AOIs should become proposed treatments
- b. using *Template 5_Prescribing AOI's and Treatments, 4_Activity Tracking Toolkit*, use Management Notes tool (Type = Treatment) to "add" each AOI and set "Apply Treatment" to yes or no
 - o if treatment is applied, fill in attributes for treatment, comments, retention objectives, etc.
 - o if treatment is not applied, and the original stand meets silvicultural criteria, enter limiting factor
- c. "Create Treatment" (this creates the treatment shapes of the stands listed in the Management Notes tool)
- d. adjust geography of polygons in treatment layer if needed (using native ArcMap editing tools)
- e. check treatments against green-up requirements
- f. run Site Conditions Treatments Analysis tool and address areas that need additional attention (*Ch.16 & appendix O*) (*7_Site Conditions Toolkit*); re-run tool after changes are made until no "Areas to Address" are found within the compartment.
- g. notify co-managers and others that participate in the Compartment Review process that draft Treatment proposals and SCA designations are ready to be reviewed.

6. Inventory Completion Date (see the FMU Inventory Timeline), preparing for Pre-Review

- a. finish the first draft of the Compartment Narrative
- b. coordinate with RAU on the assembly of the compartment packet, including covertime and treatment maps, reports, and the narrative
- c. Notify Pre-Review attendees that the electronic compartment packets are available in the RAD Tools. Distribute Narrative if not included in the draft packet in RAD tools.

7. Making changes from the Pre-Review, preparing for web posting and Open House (Ch.10 & Ch.16) (Template 5_Prescribing AOI's and Treatments)

- a. update proposed treatments (use the Attribute Editor over *4_Activity Tracking Toolkit/Management Notes Tool*)
 - o edit treatments and SCA's, per the comments from the Pre-Review, when complete
 - o edit treatment boundaries where needed (using native ArcMap editing tools)
- b. update Site Conditions layer (geometry and/or attributes) where needed (*Ch.16 & appendix O*) (*7_Site Conditions Toolkit*)
 - o run Treatments Analysis tool if changes were made
 - o 'Refresh Site Conditions' button in Treatments attribute editor

- c. forward the status of each treatment to "Compartment Review Proposal" after all edits have been made
 - o use attribute editor –
 - 1. select all treatments within compartment;
 - 2. open attribute editor;
 - 3. status/status tab;
 - 4. forward treatment via drop-down menu
- d. finalize the Compartment Narrative
- e. coordinate with RAU on updates to the maps and narratives for web posting

8. Finalize Treatments After Compartment Review (Ch.11 & Ch.16)

(Template 5_Prescribing AOI's and Treatments)

- a. use Management Notes tool (Type = Cmpt Review) to add each Treatment record to the Management Notes
- b. make any edits comment fields, or other fields based on compartment review decisions
- c. "Approve Treatment" or "Reject Proposal" and edit decision date
- d. close the Management Notes then edit the geometry of any treatments that have boundary changes from the Review (using native ArcMap editing tools).
- e. update Site Conditions layer (geometry and/or attributes) where needed *(Ch.16 & appendix O) (7_Site Conditions Toolkit)*
 - o run Treatments Analysis tool if changes were made
 - o 'Refresh Site Conditions' button in Treatments attribute editor
- f. coordinate with RAU to make final changes to the roads, trails, and other base feature data layers.
- g. make final changes to the Compartment Narratives.
- h. notify the Inventory and Planning Specialist that changes have been made and the compartment is ready for approval. (The Inventory and Planning Specialist will approve the Compartment Review Decision, and move the status to "Fld. Trt. Bdy. – Incomplete").

9. Treatments are now ready for field work. (Ch.12 & Ch.16)

(Template 6_Field Prep for Implementing Treatments)

- a. edit treatment boundary to reflect the timber sale boundary
- b. add proposal ID to Harvest tab of the treatment attribute table
- c. make any other treatment attribute changes needed
- d. when the timber sale proposal is ready for signatures, the "Approval Status" should be forwarded to "Field Treatment Boundary – Pending Approval" (using the attribute editor)
- e. once the timber sale has a bid date, the "Approval Status" will need to be forwarded to "Field Treatment Boundary" (using the attribute editor)
- f. if Site Conditions are updated use 'Refresh Site Conditions' button in Treatments attribute editor)

10. Closing Treatments (Ch.13) (Template

7_Closing_Tmts_&_Inventory_Update)

- a. using the attribute editor, enter a "Work Started" date
- b. change the "Work Status" to "Treatment in Progress"
- c. using the attribute editor, enter a "Work Ended" date
- d. change the "Work Status" to "Successful Completion" or "Prematurely Terminated" (this automatically changes the "Approval Status" to "Successful Completion –Pending Next Step – Incomplete")
- e. edit treatment boundary to reflect what was actually cut (if different from sale boundary)
- f. using the attribute editor, fill out "Needs Next Step?" Yes/No
- g. advance the "Approval Status" to "Successful Completion – Pending Next Step
- h. using *4_Activity Tracking Toolkit*, click on the "Treatment Closure Sign-Off" button
- i. select the treatment ready for closure; click the Approve/Reject button
- j. "Approve" Treatment Closure Sign-Off
- k. Needs Next Step? Yes/No
- l. if Next Step is needed, fill out information needed
- m. always click the box for "Initialize Inventory Update Process"

Inventory Updates (Ch.14) (Template

7_Closing_Tmts_&_Inventory_Updates.mxt)

- a. Decide whether Forested and/or Nonforested stand boundaries need updating.
 - o If edits are needed, go to step 'b.' below.
 - o If no edits are needed, go to step 'f.' below.
- b. Using *Template 7* and the *5_Inventory Update Toolkit*, transfer the stands to the Inventory Update layer.
- c. Use the IFMAP editing tools (Split, Merge, Island, Explode, and Burn-In) to re-digitize the area of the compartment that needs updating.
- d. Assign new stand numbers (using the Attribute editor) as needed to the Inventory Update stands.
- e. Use the "Inventory Update Transfer" tool to transfer the Inventory Update layer back to the Forested/Nonforested layers, which updates the Stage 1 stand boundaries.
- f. Update the Forested / Nonforested call if necessary (using the 'Swap Stands' tool). This is usually the case for slower regenerating sites and sites that are or will be planted.
- g. Use the Stage 1 "Forested" and "Nonforested" data editing tools (*5_Inventory Update Toolkit*) to update all impacted stand attributes. Are the following attributes updated?
 - o Survey Date
 - o Survey Type

- Age and Age Meta (First & Second)
- Species composition
- Basal Area
- Multi-Storied (Uneven-aged)
- Plantation?
- Overall Size
- 'Of Interest?'
- General Comments
- Management Considerations
- Managed Site? (for Planted or Natural regen NF Stands)
- Management Priority? (In put cover type objective for Planted or Natural regen NF Stands).