

<u>Cal</u>ifornia <u>Timber Regulation</u> and <u>Environment Evaluation System</u>

Public User Guide

Version 4

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For technical assistance contact

caltrees.support@fire.ca.gov

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1.0 Access CalTREES Web Portal and Site Navigation

The CalTREES Web Portal can be reached at: https://caltreesplans.resources.ca.gov/caltrees.

No registration or user account is required to search and review Plans, or to generate general CalTREES reports.

A CalTREES user account is required to: 1) submit Public Comment online, 2) Subscribe to Notification Requests and 3) Submit/update Timber Harvesting documents.

Navigating the CalTREES home page:

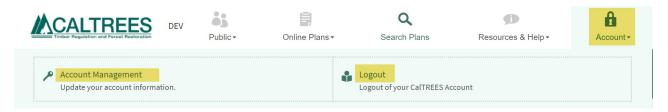
- 1. To access the **Search Plans** page, click on either Search Plans or Search P
- 2. To access CalTREES Resources and Help, click Resources & Help* at the top of the page. This will provide links to resources such as the CalTREES User Guide and CalTREES Information portal.
- 3. To register in CalTREES and create a user login, click

 Online CalTREES Account for more information.

 See Section 2.0 Create a New
- 4. If registered as a user in CalTREES and want to log into CalTREES, click on either

 Cogin or **Login** or **Login** or Email and Password to access your account.

 See **Section 3.0 Functions Available when Logged into CalTREES** for more information.
- 5. To log out of CalTREES or change account information, click on the Account, then select either Account Management and Logout.



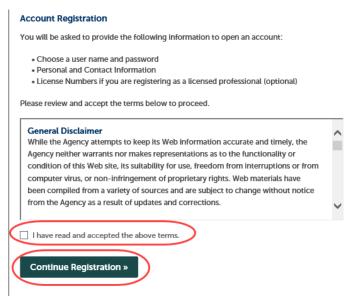
6. To access the list of CalTREES report available, click on Reports for more details on the reports available.

2.0 Create a New Online CalTREES Account

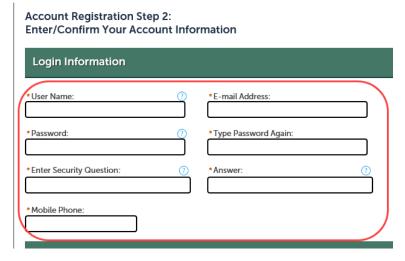
A CalTREES user account is required to: 1) submit Public Comment online, 2) Subscribe to Notification Requests and 3) submit/update Timber Harvesting documents.

2.1 Registering for a CalTREES Account

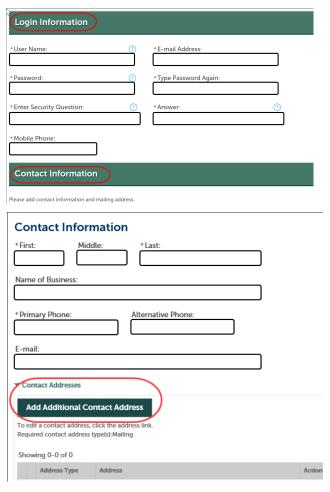
- 1. Click on Register located on the CalTREES homepage.
- 2. Read the disclaimer and check the box. Click **Continue Registration**.



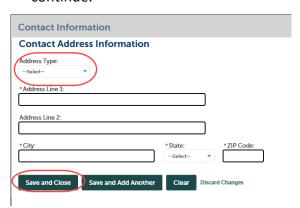
3. Under Login Information, enter information for all required fields.



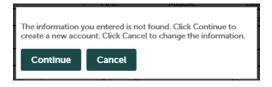
- 4. Under the Contact Information section, click Add Contact Info.
- 5. In the Type drop-down list, select **Contact** and click **Continue**.
- 6. Enter the Contact information for all required fields.
- 7. Scroll down to the Contact Addresses section and click Add Additional Contact Address.



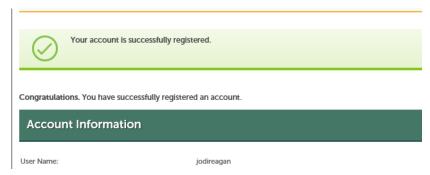
8. For Address Type, select **Mailing**. Enter the required information and click **Save and Close** to continue.



9. Click **Continue**. The below message box will display, click **Continue**.



10. Click **Continue Registration**. The following message should display:



11. A welcome email from "No_Reply@resources.ca.gov" will be sent.



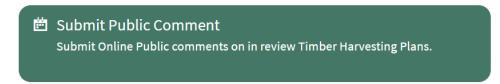
12. Once your account has been created, login. Click Login Now and View Available Services.

Login Now and View Available Services

3.0 Available Features when Logged into CalTREES

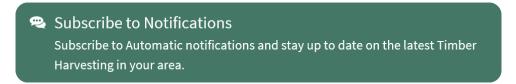
Once logged into CalTREES, additional features are available.

3.1 Submit Public Comments



Use this feature to electronically submit an online Public Comment. See <u>Section 4.0 Submit Public Comment</u> for more details.

3.2 Subscribe to Notifications

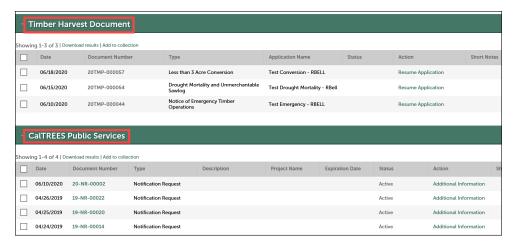


This feature allow users to set up an automated email notification to be sent when identified events occur to timber harvesting document. See <u>Section 5.0 Subscribe to Notifications</u> for more details.

3.3 View My Records



The "View My Records" feature allows access to Notification Requests, Public Comments and Harvesting documents that you have submitted in CalTREES. The "View My Records" page is divided into two parts, upper part of the page lists the Harvest Documents that you have submitted. The lower part of the page displays the notifications you have subscribed to and the Public Comments you have submitted.



3.4 Reports



This allows access to online CalTREES reports. See Section 6.0 CalTREES Reports for more details.

3.5 Plan Submission

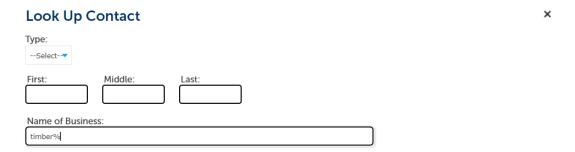
All Plan submissions need to be submitted from a logged in CalTREES account.

NOTE: The system has a short downtime window and will log out a user if no activity after 30 minutes.

3.5.1 Contacts and Managing Agents of a Plan

For a submission the most challenging part of the process can be dealing with the contacts. Please reach out to the Review Team office or CalTREES support as listed under Resources in Section 10 of this user guide if there are any questions.

NOTE: always try to select from your account or look up an existing contact in the system prior to "creating" a contact to avoid duplicate entries in the database. If there are any changes to existing contacts reach out to the Review Office to update that information. When searching for existing contacts less is better, and the wildcard % symbol can be very helpful when trying to search contacts. Example: under Name of Business searching for all contacts that start with "timber".



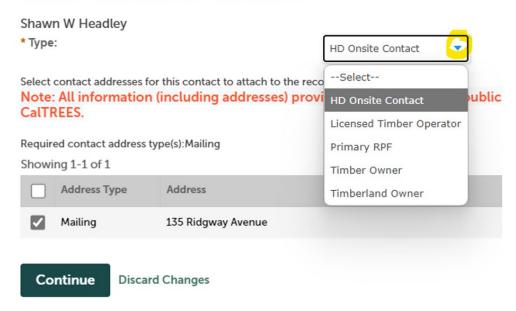
This would return a list with the following to select from to add as a contact.



NOTE: License Professionals contact information cannot be changed by Review offices, RPF license and LTO license must go through those offices for any changes to information connected to those contacts.

When going down the list of contacts make sure to select the type in the dropdown menu for each contact. And each contact will be required to provide a *Mailing address*.

Select Contact from Account



Understand all the information for each contact will be added to the submission and therefore will be public information.

3.5.2 New Exemption or Emergency Notice



- 1. Click on **Submit a New Plan**, read and accept the disclaimer.
- 2. A list of available Plan options will appear. Click on the Plan option to submit and click **Continue**. The list below is all of the Plans available to submit, but depending on the CalTREES permission levels, this list may be different.

Select a Record Type
Choose one of the following available record types. For assistance or to apply for a record type not listed below please contact us.
✓ Conversions ○ Less than 3 Acre Conversion ○ Public / Private Utility Right-of-Way
▼ Emergencies ○ Fuel Hazard Reduction (RM65) ○ Notice of Emergency Timber Operations ○ Sudden Oak Death Disease
 ✓ Exemptions 10 Percent Dead, Dying Diseased, Fuelwood, or Woody Debris v2019 Christmas Trees Drought Mortality and Unmerchantable Sawlog v2019 Forest Fire Prevention v2019 Oak Woodland Management v2019 Post Fire Recovery v2020 Small Timberland Owner Structure Protection (0 to 150 feet) v2019 Structure Protection (150 to 300 feet) v2019
▼ NTMP ○ Nonindustrial Timber Management Plan
▼ THP ○ Timber Harvesting Plan

3. Fill in all required information pertaining to the type of Plan being submitted. CalTREES will guide the submitter through the process of entering and submitting a Plan.

NOTE: Anytime during the process, click **Save and resume later** to save the information currently. entered in CalTREES, located at the bottom of each data entry screen. Save and resume later

- 4. After all the required information has been entered, the **Review** page will display. Review the information entered into CalTREES, use the **Edit** button on the line next to a section for any edits. After the data has been updated, click **Continue Application**, returning the process back to the **Review** page. When satisfied with the data entered, click **Continue Application** and submit the Plan to CalTREES for Region Review to validate.
- 5. After clicking **Continue Application** to submit through CalTREES, a "Record Issuance" screen with the new Plan number will be displayed confirming submission.

3.5.3 New THP or NTMP

During submission of a Timber Harvesting Plan (THP) or Nonindustiral Timber Management Plan (NTMP) online through CalTREES, some information within Section I and Section II will be required for input. After submission, the RPF, and other parties of a Plan will receive notifications on the status of the Plan through the review process.

1. During the Plan selection process, select THP or NTMP in the dropdown menu and click continue.

* indicates a required field.



2. Contact List.

Enter the contacts associated with the Plan. The system will not proceed unless all required contacts are entered. Reach out to the Region Review office for difficulties with contacts.

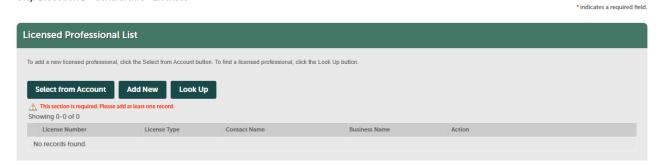
Step 1: Section 1 - General Info > Contacts

Contact List To add new contacts, click the Select from Account or Add New button. To edit a contact, click the Edit link Required Contact Type Minimum Plan Submitter Primary RPF Timberland Owner Select from Account Add Contact Info Showing 0-0 of 0 Full Name Business Name Contact Type Primary Phone Work Phone E-mail Action No records found Continue Application » Save and resume later

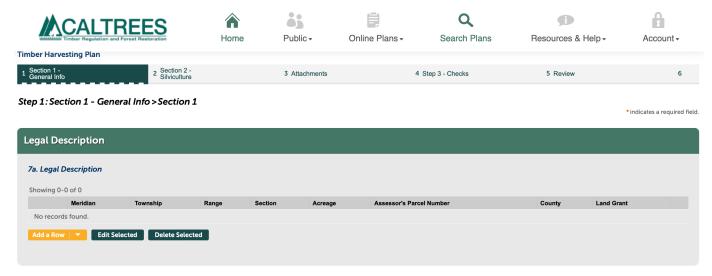
3. Licensed Professional List

List known licensed professionals associated with the Plan. At least one is required to proceed to the next section. NOTE: this section may be pre-populated with the information related to the license chosen for the record during the initial Plan selection in step 1.

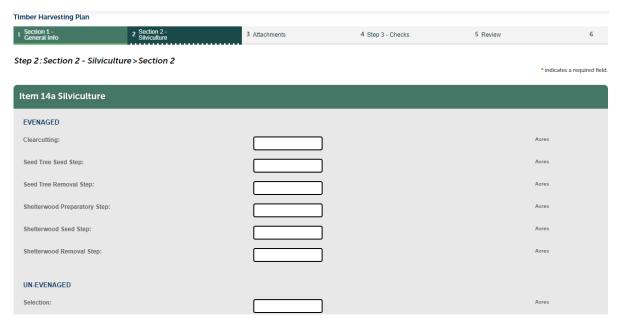
Step 1: Section 1 - General Info > Licenses



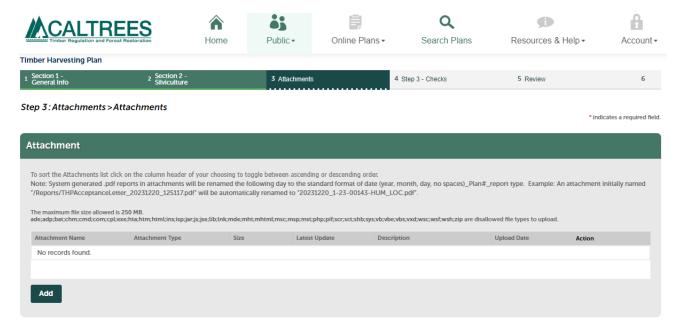
4. For Section I (General Information) input the Plan data into the corresponding fields.



5. For Section II (Silviculture acres only), input the Plan data into the corresponding fields.

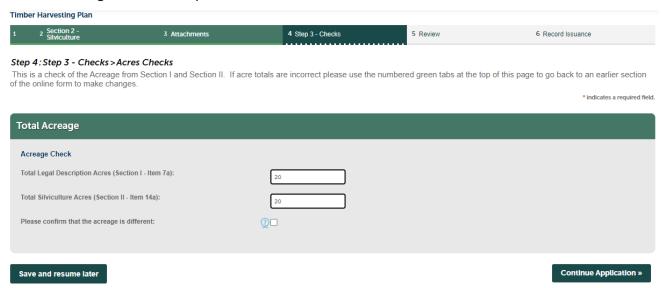


6. On the attachments page upload the Plan Sections and Notice of Intent (NOI) or Notice of Preparation (NOP) if applicable.

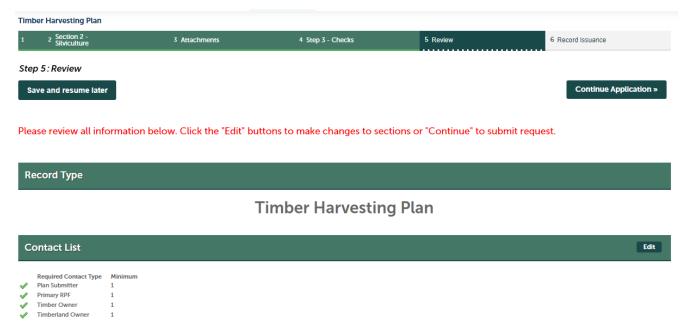


The "Add" button allows for selecting one or more attachments for upload. For each attachment, include the type of document and a description before clicking "Save".

7. On Step 4, a confirmation of acres within Section I (legal description) and Section II, silviculture acres are required. If they are incorrect navigate back to the section using the green step tabs at the top of the page. If the acres are legitimately different, check the box confirming there is an explanation included in Section II of the submitted Plan.



8. After all the required information has been entered, the **Review** page will display. Review the information entered into CalTREES, use the **Edit** button on the line next to a section for any edits. After the data has been updated, click **Continue Application**, returning the process back to the **Review** page. When satisfied with the data entered, click **Continue Application** and submit the Plan to CalTREES for Region Review to validate.



9. After clicking Continue Application to submit through CalTREES, a "Record Issuance" screen with the new Plan number will be displayed confirming submission. (or click on the green step buttons at the top of the screen for that section)

3.6 Amendments, Addendums, and New Information Submission

NOTE: This functionality is only for those that have created an account in CalTREES and are an approved agent of the Plan to submit. If there are problems encountered when trying use the system, please contact the local review team office or CalTREES Support.

1. Go to 'View My Records' under 'Online Records' from a logged in account.



Definitions for these submissions:

Additional Information – New info or correspondence for the Plan prior to approval.

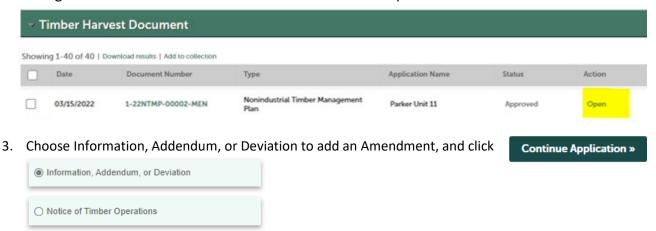
<u>Addendum</u> – New info that does not change operations. Examples: Notice of Commencement, contacts change (phone number adjustments, new RPF or LTO), expected plant or animal surveys, inventory updates for NTMPs, etc.

<u>Minor Amendment</u> – New info that potentially changes operations. Examples: Surveys that could alter mitigations, expiration date extension, new roads < 600′, Substantial Deviations submitted as a minor with supporting documentation, etc. See Minor Deviation definition under 14 CCR 895.1.

<u>Substantial Deviation</u> – As defined under 14 CCR 895.1. Also referenced as a Major Amendment.

NOTE: If the Substantial Deviation has been determined to be minor in scope, in coordination with the Unit Forest Practice Inspector and other Review Team agency members as appropriate, the amendment can be submitted as a Minor Amendment.

2. Navigate to the Plan to add new information and click "Open" in the Action column.



4. Select type of submission from the Document Type dropdown and include a concise description of the new information. Note: Review Team has the authority to change and correct if needed.



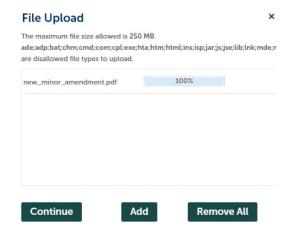
5. Make sure there is a Plan Submitter included with the submission. The best way is to select "contact from account," and add one of the agents of the Plan, and click the correct mailing address.



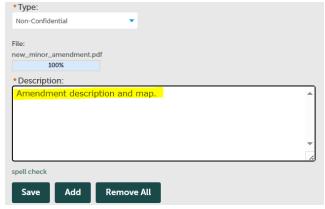


NOTE: The email provided will receive notifications during key points in the review process.

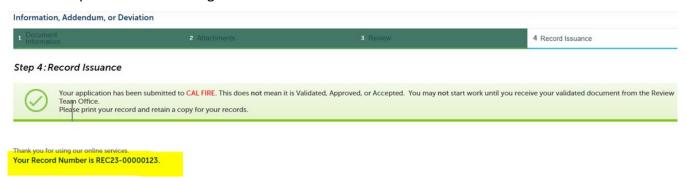
6. Add attachment. This should be a PDF which answers the who, what, when, where, why, and how of what is being submitted. This needs to be only one attachment, so please combine files into one pdf prior to this step. Click the "Add" button in the attachment screen and then click "Add" in the file upload screen. Navigate to where the PDF is saved, click on the file, and when the status bar hits 100%, click continue.



7. By default, the upload type is non-confidential. Any confidential information associated with the submission must be emailed to the Region Review office rather than uploaded into CalTREES. Include a description for what is being uploaded, not necessarily repeating the amendment description. Keep it simple "Amendment description and map." Remember to click save before continuing.



- 8. Summary page will open. Review submission and edit anything that looks incorrect with the "Edit" button on that item. Or click on the green step buttons at the top of the screen for that section.
- 9. Finally, there will be a received file number "REC" which is the initial tracking ID until the Review Team confirms the submission. Email notifications will automatically be sent which identify if it was accepted or denied along with the official number of the amendment or addendum.



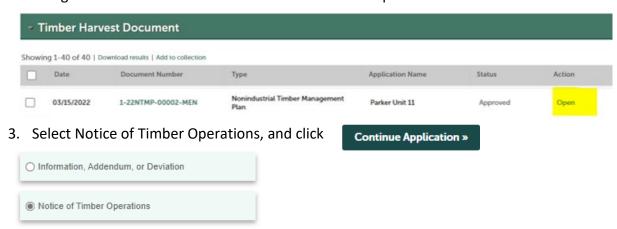
- 10. Once accepted, another email will be sent with a link, and in the "Attachments" of the record there will be an acceptance cover letter / summary as the first page of the Amendment or Addendum.
 - NOTE: If the submittal is a Substantial Deviation (major amendment), at this step there will be an email notice that the deviation will continue to First Review and follow the discretionary review process before the final approval page (Directors Determination) is added to the attachment.

3.7 Notice of Timber Operations (NTO) for an NTMP Submission

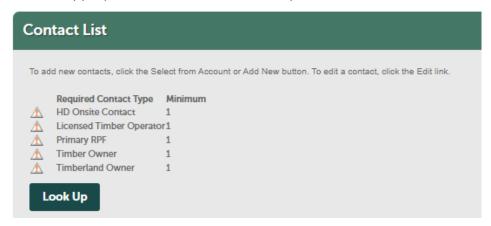
1. Go to 'View My Records' under 'Online Records' from a logged in account.



2. Navigate to the NTMP to add the NTO for and click "Open" in the Action column.

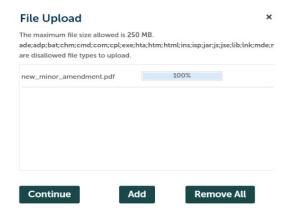


4. Add the appropriate contacts and licensed professionals for the NTO.

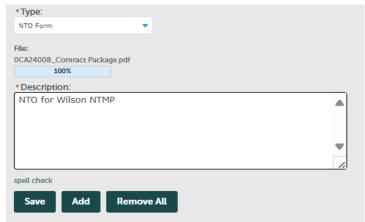


5. Follow the prompts to add the Timber Operation dates, heavy equipment to be used, legal description, silviculture, and watershed info. **These are all required to submit an NTO**.

6. Add the completed NTO form attachment from the most recent form available on the CAL FIRE Forest Practice forms page online (form number RM-68A). This needs to be only one attachment, so please combine additional files and pages into one pdf prior to this step. Click the "Add" button in the attachment screen and then click "Add" in the file upload screen. Navigate to where the PDF is saved, click on the file, and when the status bar hits 100%, click continue.



7. By default, the upload type is the NTO Form. Any confidential information associated with the submission must be emailed to the Region Review office rather than uploaded into CalTREES. Include a description for what is being uploaded, not necessarily repeating the amendment description. Keep it simple "NTO for Wilson Family NTMP" Remember to click save before continuing.



- 8. After all the required information has been entered, the Review page will display. Review the information entered into CalTREES, use the Edit button on the line next to a section for any edits. (or click on the green step buttons at the top of the screen for that section) After the data has been updated, click Continue Application, returning the process back to the Review page. When satisfied with the data entered, click Continue Application and submit the Plan to CalTREES for Region Review to validate.
- 9. Finally, there will be a Record Issuance to confirm the submission. Additional email notifications will automatically be sent with the submission and identify if it was accepted or denied along with the official number of the NTO.
- 10. Once accepted, another email will be sent with a link, and in the "Attachments" of the record there will be an acceptance cover letter / summary attached as the first page of the NTO.

3.8 Linking RPF License to CalTREES Account

Once registered in CalTREES. If an RPF, link the RPF license information to a CalTREES account. Use the **Link My License** button.



Look up the RPF license and enter a PIN provided by the Board of Forestry and Fire Protection. If you have not received your PIN, please contact CalTREES Support to link your RPF license to your CalTREES account.

4.0 Submit Public Comment

This feature allows users to submit online public comments.

To access the Submit Public Comment functions:

1. From the home page, click on the **Submit Public Comment** button or



2. From the top of the page, click on the **Public**, then click on the **Submit Public Comment** button.



3. Read the general disclaimer and check the box before proceeding.

Part 1 - Required Information

4. In the Public Comment Information area, select the item to comment on. Use the selection drop down to 1. Select a Plan from the list, 2. Select "Enter a Plan number manually" with a prompt to enter a Plan number or 3. Select "I don't know the Plan number" and enter the County and City near the activity you are commenting on.

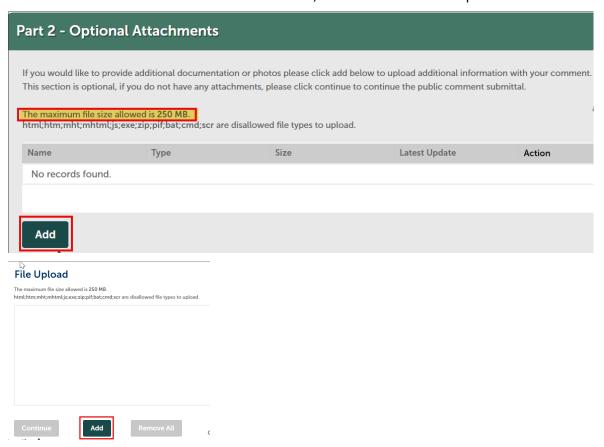


5. The next field is the text for the public comment. The limit on the text for the public comment field is 4,000 characters. If that is not enough character to express your comment, please attach a file Part 2.

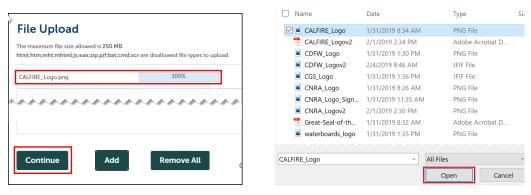


Part 2 – Optional Attachments area allows files to be attached to the Public Comment. This is optional. The maximum file size is 250MB.

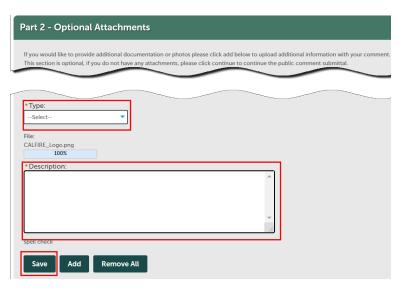
6. Click Add in this section to add documents. Then, click Add on the File Upload screen.



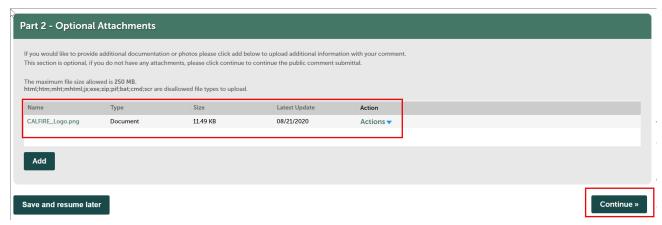
7. On the next screen, select the file(s) to attach and click on **Open**. Then the list of files will be listed on the File Upload screen and if the list is correct, click on **Continue**. This will take you back to the Part 2 screen again.



8. Enter the Type field which describes the type of file being attached. Select the Type of file from the dropdown menu.



- 9. Then enter a description of the attachment in the Description text box.
- 10. Once this information has been entered, click **Save** to attach to the comment.
- 11. After clicking Save, the attached file(s) will be listed, click Continue.



5.0 Subscribe to Notifications

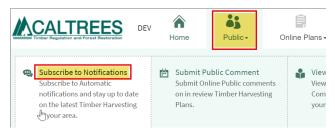
This feature allow users to set up an automated email notification to be sent when identified events occur to timber harvesting document.

To access the Subscribe to Notification functions:

1. From the home page, click **Subscribe to Notifications**



2. From the top of the page, click on the **Public**, then click **Subscribe to Notifications**.



Read the disclaimer and check the box before proceeding.

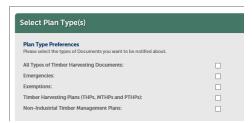
NOTE: The only parameter that is required is the Frequency field. All other items are optional, but it is recommended that parameters are entered into at least one other field. If not, notifications for ALL Plans will be received.

The parameters that can be entered are: Plan Type(s), Watershed(s), County(ies), and Timber Harvesting Document Number(s).

3. Frequency Settings - Select a notification frequency from the drop-down list



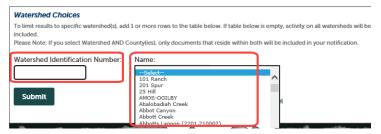
4. **Select Plan Type(s)** - Check the box for the Types of Records you would like to be notified about.



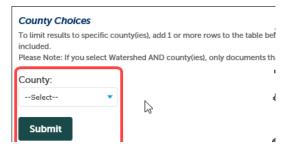
NOTE: only use the watershed choice or the county selection, <u>do not use both</u>. If both are used, the outcome will only be notifications about Plans that are in both the identified Watershed and the identified County.

5. Select Watershed(s), Click Add A Row.

6. Enter a Watershed ID Number or select from the drop-down menu and then click Submit.



- 7. Repeat as needed for additional Watersheds.
- 8. Select County(ies), Click Add a Row.
- 9. In the drop-down list, select the county and click **Submit**.



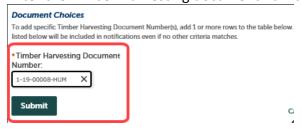
10. Repeat as needed to add additional counties.

NOTE: Click the Save and Resume Later at any time to save entries.



When ready to continue filling out the information, go to **View My Records** and click on **Resume Application** to complete the Notification Request.

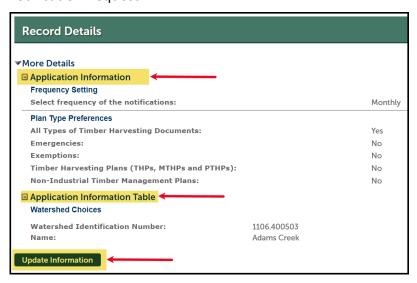
- 11. Select Timber Harvesting Document Number(s), Click Add a Row.
- 12. Enter the Timber Harvesting document number and click Submit.



- 13. Click Continue.
- 14. The Review page is displayed next. Review all information and make changes as needed.
- 15. Click **Continue** to submit the Notification Request application.

NOTE: Once the Notification Request is complete, a Record Number is given.

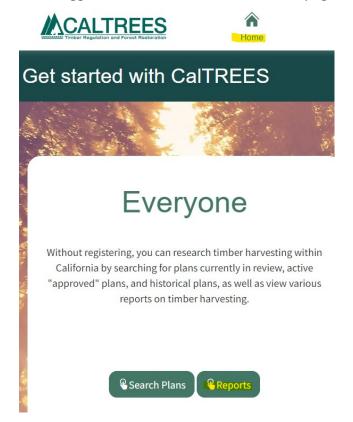
- 16. To view Record Details for any Notification, click on View My Records.
- 17. The Notification Request will be listed under CalTREES Public Services. Click on the **Document Number link** to open the record.
- 18. Under Record Details, expand the arrow next to **More Details**, and then click the **plus (+)** sign for **Application Information** and **Application Information** Table to display the details of the Notification Request.



19. Click **Update Information** to update or unsubscribe to the Notification Request.

6.0 CalTREES Reports

If not logged into CalTREES, from the Home page, click on the Reports button to access reports.

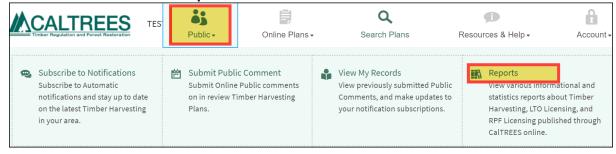


If logged into an account in CalTREES, reports are available in two ways:

1. Click **Reports** on the Home page.

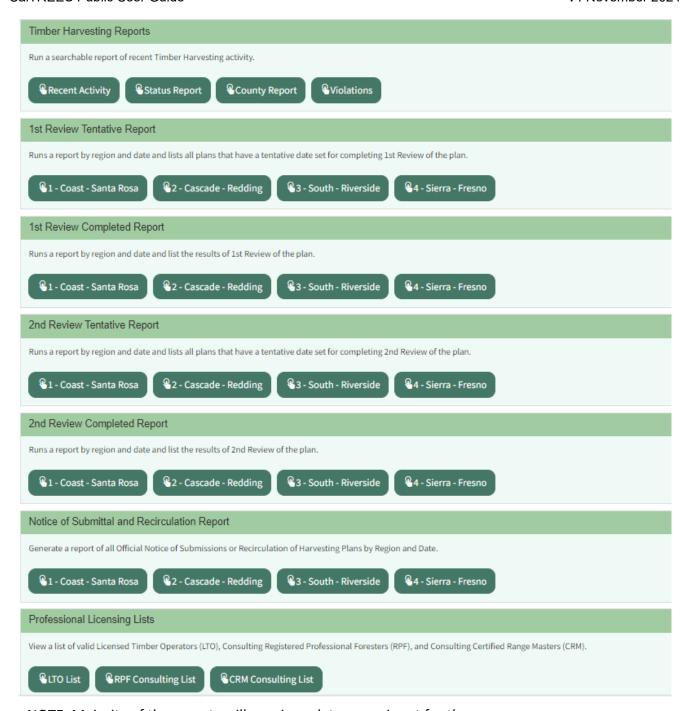


2. Click **Public** and then click **Reports**.



A list of reports will appear. This page contains common reporting requests from the CalTREES regarding Harving Plans, LTO status, and more.

NOTE: CalTREES data may be incomplete. Please contact a CAL FIRE Region Review office if missing data or inconsistencies have been identified with the information presented.



NOTE: Majority of the reports will require a date range input for the query.

6.1 Recent Activity

Displays recent Plan Addendums, Amendments, Notice of Commencements, Notice of Submission, Completion Reports, Emergencies, and Exemptions received by CAL FIRE in the past year.

6.2 Status Report

Displays submitted info to CAL FIRE Forest Practice for Plans with the goal of the report to familiarize those interested with the Plan review process and provide general information on current Plans under review.

6.3 County Report

Creates a list of approved or returned harvest documents for a given county.

6.4 Violations

This report is a list of administrative actions. An administrative action is the lowest level of enforcement. It is an allegation and is documented with a "Notice of Violation". The Department alleges that a violation of the Forest Practice Rules/Forest Practice Act has occurred of the specific code(s) identified. Additional enforcement action may be taken, but this report only identifies administrative actions.

6.5 1st Review Tentative Report

Creates a tentative list of First Reviews that will take place during the specified week. The report will extract the tentative First Reviews scheduled in the seven days before the end date provided.

6.6 2nd Review Tentative Report

Creates a tentative list of Second Reviews that will take place during the specified week. The report will extract the tentative Second Reviews scheduled in the seven days before the end date provided.

6.7 1st Review Complete Report

Creates a list of all First Reviews completed in the specified week. The report will extract the First Reviews completed in the seven days before the end date provided.

6.8 2nd Review Complete Report

Creates a list of all Second Reviews completed in the specified week. The report will extract the Second Reviews completed in the seven days before the end date provided.

6.9 Professional Licensing Reports

Provides the official valid list of Licensed Timber Operators (LTO), Consulting Registered Professional Foresters (RPF), or Consulting Certified Range Masters (CRM).

7.0 Search for Timber Harvesting Documents

To access the Search Plans page, click on either

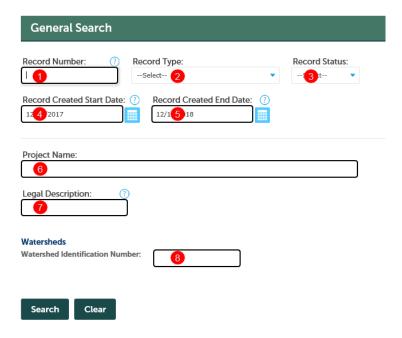


7.1 Search Criteria

All items on the search page can be used as search criteria. Figure 1 - CalTREES Search Criteria shows all eight of the fields that can be used for searching in CalTREES. On the Search Home Page, to make the "Watersheds" search field visible, click on the **Search Additional Criteria** link.

CalTREES Help text is found for items that have a question mark next to the item $(^{\circ})$. Click on the question mark next to the item and additional information about the search field will pop up.

Once all search criteria have been entered, click **Search**. To clear the search parameters entered on the search screen, click **Clear**.



7.2 Wildcard Searching

The CalTREES application has a wildcard character (%) that can be used to assist with searching in CalTREES. The wildcard can be used in the text fields but cannot be used in the "Date" fields or fields with dropdown menu choices. The wildcard is used to take the place of any other character or string of characters in the field. The wildcard can be used multiple time in a search field to assist in narrowing down the search results.

7.3 Record Number/Harvest Document Number Search

The Record Number field is equivalent to the Harvest Document Number. The Record Number field format is 2-17EX-934-SHA where the field is represented by following components: [Region#]-[YY][Type]-[Sequence #]-[County].

Region # - 1 = North Coast - Santa Rosa, 2 = Cascade - Redding, 3 = Southern - Riverside, 4 = Central Sierra - Fresno

- YY Last 2 digits of year Plan was submitted
- **Type** the type of Plan; EX = Exemption, EM = Emergency, NTMP = Nonindustrial Timber, Management Plan, THP = Timber Harvesting Plan.
- **Sequence** = Unique Sequence Number assigned to Plan. Plans submitted before October 1, 2018, will have a three digit sequence and Plans submitted on or after October 1, 2018, will have a five digit sequence code.
- **County** = three character County identifier (see Appendix A for the list of all Counties and their associated 3 letter identifier)

Examples of wildcard (%) use in the Record Number/Harvest Document Number field:

- To search for all Plans in Region 2, use the following format "2-%"
- To search for all Plans in Shasta county, use the following format "%-SHA"
- To search for all Plans submitted in 2018, use the following format "%-18%
- To search for Emergency plans in Region 2 in Shasta County, use the following format "2-%EM-%-SHA"
- To search for Emergency plans in Region 2 submitted in 2018 in Shasta County, use the following format "2-18EM-%-SHA"

7.4 Record Type/Plan Type and Record Status Search

Record Type is equivalent to the Plan Type. The Record Type and Record Status have dropdown menus that can be used to determine search criteria.

When viewing the dropdown list for Record Type, it will display differently depending on the internet browser being used. If Internet Explorer (IE) is being used, a full list of items will be shown in the dropdown menu, but only the items that can be used in the search will be available to select. All other choices will be "greyed out". If the browser is Chrome, then only the searchable Record Types will be displayed.

Record Status values are based on the Record Type chosen as search criteria. A Record Type must be selected to be able to enter a Record Status as search criteria. When a Record Type is chosen, only Record Statuses appropriate for that Record Type will be displayed in the dropdown menu.

The Record Status has several choices and some of the choice will not be used. Please see the Appendix A for the most common Record Statuses and their definitions.

7.5 Record Created Start and End Dates

The Record Created Start Date and Record Created End Date represent the date range when a Plan was submitted to CAL FIRE. NOTE: This does not represent the date a Plan changed from one status to another.

One example of searching by date is:

• To search Plans submitted between January 1, 2018 and August 1, 2018, enter "01/01/2018" in the Record Created Start Date and enter "08/01/2018" in the Record Created End Date.

7.6 Project Name Search

The Project Name is a field that can be submitted on the harvest document plan. It is an optional field, so it may not always exist on all Plans in CalTREES. This field is a text field and the wildcard (%) can be used to assist with searching. Examples of searching by Project Name:

- To find Plans with "Carr" in the Project Name field, enter the following format "%Carr%"
- To find Plans where Project Name begins with "Carr", enter the following format -"Carr""
- To find Plans where Project Name ends with "Carr", enter the following format -"%Carr"

7.7 Legal Description Search

When searching by the Legal Description, there is a very specific format that must be used. The format is [Merdian][Township][2 spaces][Range][2 space][Section#]. Below are the components of the Legal Description with the valid values for the search:

- Median H = Humbolt, M = Mount Diablo, S = San Bernardino
- Township ##N or ##S (where ## is the two digit number; 0 pad if only one digit, ex. 05N)
- Range ##E or ##W (where ## represents a two digit number; 0 pad if only one digit, ex. 05E)
- Section # (space pad if only one digit, ex. ' 1')

If the Township or Range are only one digit, a leading zero must be added to make the search value contain 3 characters. For example, if the Township is "3N", the search value of the Township should be "03N". The same is true of the Range. If the Range is "5E", the search value of the Range should be "05E". Please note, the cardinal directions can be upper or lower case.

If the Section is only one digit, then an additional space must be added in front of the number. For example, Section is equal to 1, then a space is added before the number – "1" and this space is in addition to the two spaces required between the Range and Section.

Example searches Note: the wildcard character (%) is supported for this search:

<<mark>Meridian</mark>><<mark>3-character Township</mark>><<mark>2 spaces</mark>><<mark>3-character Range</mark>><<mark>2 spaces</mark>><<mark>2-character Section#</mark>>

What is being searched	Enter	Comments
Mount Diablo, Township 16N	M16N%	
Mount Diablo, Township 16N, Range 10W	M16Nxx10W	
Mount Diablo, Township 16N, Range 10W, and Section 3	M16Nxx10Wxx <mark>03</mark>	2 spaces between township and range, 2 between range and section
Mount Diablo, Township 6N, Range 10W, and Section 12	M06Nxx10Wxx12	2 spaces between township and range, 2 between range and section
Any Meridian, Township 16N, Range 4W and any Section	% <mark>16Nxx</mark> 04W%	2 spaces between township and range
Only Humboldt Meridian	H%	
Humboldt, any township, Range 5E, and Section 10	H%05Exx <mark>10</mark>	2 spaces between Range and section

Once search results are found, to see the actual Legal Description field for a specific Plan, a specific Plan must be selected and reviewed. Once a Plan is selected, go to "Record Info", then "Record Details", then "More Details", then "Applications Information Table". This is the table that lists the actual Legal Descriptions for the selected Plan.

7.8 Watershed Search

Watershed information is submitted on timber harvest Plans and there are several ways to search for the information. To search by the Watershed, the exact Watershed can be entered or the wildcard(%) can be used.

- Search by specific Watershed to search for Plans in a specific Watershed, then entire Watershed number can be entered into the field. For example, "6532.230501" could be entered and CalTREES would find all Plans with that specific Watershed.
- Search using wildcard(%) the wildcard can be used anywhere in the Watershed field. Here are a couple of examples of how it can assist with searching.
 - o To search for a group of Watersheds that start with "6532", then enter "6532%"
 - To search for a Watershed starting with "6532" and ended with "01", then inter
 "6532%01"

Once search results are found, to see the actual Watershed field for a specific Plan, the Plan must be selected and reviewed. Once a Plan is selected, go to "Record Info", then "Record Details", then "More Details", then "Applications Information Table". This table first lists the Legal Description and then the actual Watersheds are listed second in the table.

8.0 General Search Results

8.1 Sorting Search Results

The search results are displayed in a table and will provide a list of Plans that meet the search criteria. At the top of the results are column labels and the column labels can be used to sort the results. To sort the results, click on the column label and it will sort the results in ascending order and click the label again and results will be sorted in descending order.



8.2 Exporting Search Results

The search results can be exported in a CSV format by clicking on the **Download results** link. This export will provide a list of all the Plans found in the search.



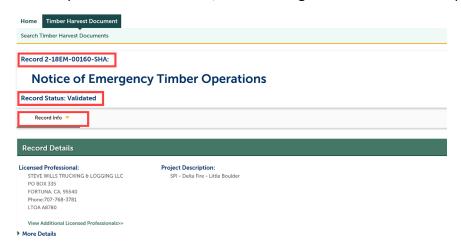
9.0 Reviewing Plans

To select a specific Plan, click on the document number link of the Plan you would like to review.

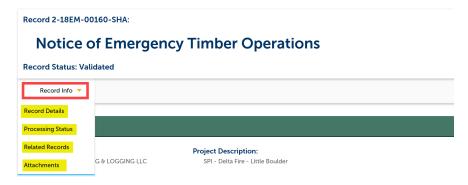


9.1 Specific Plan Review

Once a specific Plan is selected, the following information will be displayed.



To get additional information about the Plan, click on the **Record Info** link.



9.2 Record Details

To see the Record Details information, click on "Record Details". This section includes License Professional and Contacts. The "Application Information" and "Application Information Table" contains different types of data depending on the document type. Click on the plus sign (**) next to the label to see details.



9.3 Application Information

When reviewing the parent record, click on the plus sign (■) next to Application Information



9.4 Application Information Table

When reviewing the parent record, click on the plus sign (■) next to the Application Information Table and information about the parent record will be displayed. Since the parent record is currently selected, the Legal Descriptions (Location) and, depending on the Plan, the Watersheds will be displayed.

9.5 Processing Status

The Processing Status section shows the step in the Plan processing. The symbols next to the phase has different meanings:

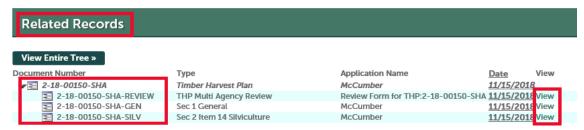
- 1) The green check mark means the step has been completed
- 2) The hour glass means the step is in progress
- 3) If there is no symbol next to a step that means the step has not started



For details, click the arrow next to the step name. In the example, all steps up to Completion and Stocking Report are complete. The Verification step is highlighted to show the due date of the task and when it was completed.

9.6 Related Records

CalTREES creates a structure below the main document also called the parent record. The lower level items are called Related Records. The Related Records represent the different sections of the Plan. To view details about Related Records, click the "View" link next to item.



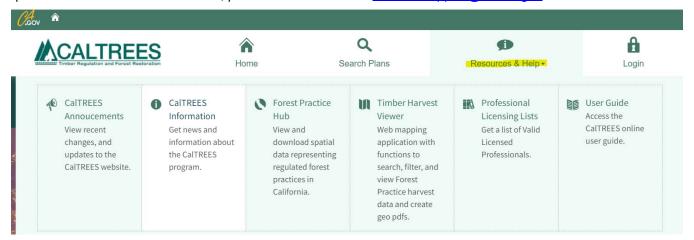
9.7 Attachments

The attachments are documents that pertain to the Plan. In this example, there are two documents associated to the Plan. One is the Plan ("Harvest Document Image") that was submitted and the other is the acceptance letter generated by CAL FIRE. To view the documents, click on the Attachment Name of the specific document to view.



10.0 Resources

There are several links in the Resources & Help menu with a variety of support areas for users. Any problems, questions or issues with CalTREES, please send an email to caltrees.support@fire.ca.gov.



On the CAL FIRE website see the CalTREES page for additional support material. There are several links to memos, user guides, and instructional videos.

https://www.fire.ca.gov/what-we-do/natural-resource-management/forest-practice/caltrees



Review Team Offices

Fresno: fresnoreviewinbox@fire.ca.gov (559) 243-4107

Redding: reddingreviewinbox@fire.ca.gov (530) 224-2445

Santa Rosa: santarosareviewteam@fire.ca.gov (707) 576-2959

Appendix A

A.1 Search Criteria Definitions

- 1) Record Number harvest document (HD) number
- 2) **Record Type** list of all Plan types; can only select one specific type
- 3) **Record Status** list based on Record Type status options
- 4) Record Created Start / End Date the date range the Plan was submitted
- 6) **Project Name** project Name assigned to harvest document by submitter
- 7) Legal Description Meriden, Township, Range and Section where timber ops take place
- 8) Watersheds California State Planning Watershed names and numbers from v2.2

A.2 Status Definitions in CalTREES

Record Status	Definition
Approved / Accepted	Has been approved or accepted and ready for Timber Operations
Closed	Plans that have been completed
Denied	CAL FIRE determined the Plan is not incompliance
Director Decision	15 working days that Director has to approve Plan
Filed	Plan has proceeded past First Review and ready for a Preharvest Inspection (PHI) if needed
In Review	Plan is in First Review
In Second Review	Plan is in Second Review
PHI Scheduled	PHI for this Plan has been scheduled
Public Comment	The last 10 day period for public comment to be provided
Received	Received by CAL FIRE
Recirculation	New information after multi-agency review needing public review period.
Returned	Plan returned prior to filing date for insufficiencies
Withdrawn	Harvest document withdrawn from review prior to determination of conformance.

A.3 CAL FIRE Regions

Numeric CAL FIRE Regions		
1 – North Coast Region I - Santa Rosa		
2 – Cascade Region II - Redding		
3 – Southern Region III - Riverside		
4 – Central Sierra Region IV - Fresno		

A.4 CAL FIRE Units

CAL FIRE Units				
AEU	Amador-El Dorado	MVU	San Diego	
BDU	San Bernardino	NEU	Nevada-Yuba-Placer	
BEU	San Benito-Monterey	RRU	Riverside	
BTU	Butte	SCU	Santa Clara	
CZU	San Mateo-Santa Cruz	SHU	Shasta-Trinity	
FKU	Fresno-Kings	SKU	Siskiyou	
HUU	Humboldt-Del Norte	SLU	San Luis Obispo	
LMU	Lassen-Modoc	TCU	Tuolumne-Calaveras	
LNU	Sonoma-Lake-Napa	TGU	Tehama-Glenn	
MEU	Mendocino	TUU	Tulare	
MMU	Madera-Mariposa-Merced			

A.5 List of County Abbreviations

List of Counties with Abbreviations					
ALA	Alameda	MAD	Madera	SJN	San Joaquin
ALP	Alpine	MAN	Marin	SLO	San Luis Obispo
AMA	Amador	MAR	Mariposa	SMO	San Mateo
BUT	Butte	MEN	Mendocino	SBA	Santa Barbara
CAL	Calaveras	MER	Merced	SCL	Santa Clara
COL	Colusa	MOD	Modoc	SCR	Santa Cruz
CCA	Contra Costa	MOO	Mono	SHA	Shasta
DEL	Del Norte	MON	Monterey	SIE	Sierra
ELD	El Dorado	NAP	Napa	SIS	Siskiyou
FRE	Fresno	NEV	Nevada	SOL	Solano
GLE	Glenn	ORA	Orange	SON	Sonoma
HUM	Humboldt	PLA	Placer	STA	Stanislaus
IMP	Imperial	PLU	Plumas	SUT	Sutter
INY	Inyo	RIV	Riverside	TEH	Tehama
KER	Kern	SAC	Sacramento	TRI	Trinity
KIN	Kings	SBO	San Benito	TUL	Tulare
LAS	Lassen	SBR	San Bernardino	TUO	Tuolumne
LAN	Los Angeles	SDO	San Diego	VEN	Ventura
LAK	Lake	SFO	San Francisco	YOL	Yolo
				YUB	Yuba