California Timber Regulation and Environmental Evaluation System
(Online Submission of Harvesting Documents)

Public Training for Harvest Document Search and Review

November 28, 2018
Presentation Overview

Greetings and Introduction
Purpose of this Meeting
Search Criteria and Wildcard
Searching for Documents in CalTREES
Reviewing Documents
Online Reports
Questions / Input

11/28/2018
Purpose of This Meeting

- Only cover how to search and review plans in CalTREES (similar to functionality currently in FTP THP Library)
- CalTREES went live internally and submitted plans are entered into CalTREES by CAL FIRE
- Plans received before CAL FIRE went live have been migrated to CalTREES
CalTREES Search Criteria

1) **Record Number** (Harvest Doc Number) *can also use to search by Region, Year, County*
2) **Record Type** (Plan Type)
3) **Record Status** - specific to Plan Type
4) **Record Created Start Date** (Submitted Date)
5) **Record Created End Date** (Submitted Date)
6) **Project Name**
7) **Legal Description**
8) **Watershed**

Note: Help text is available by clicking the help symbol
Search Using the Wildcard

- CalTREES Wildcard is “%”
- Can be used anywhere in a field
- Can be used multiple times in a field
- “%-SHA”; result - all records ending in “–SHA”
- “2-18%”; result - all records beginning with “2-18”
- “2-%EM-%-SHA”; result – all records starting with “2-”, containing “EM” and ending with “–SHA”
- Note: to limit search results use additional criteria
CalTREES Search Results

- Initial Search Results are displayed in a table
- Labels in table can be used to sort results
- Results can also be exported via “Download Results” link

<table>
<thead>
<tr>
<th>Date</th>
<th>Document Number</th>
<th>Type</th>
<th>Application Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/08/2018</td>
<td>2-18EM-00159-SHA</td>
<td>Notice of Emergency Timber Operations</td>
<td>Michael, John and Sharon Oconnell - Delta Fire</td>
<td>Validated</td>
</tr>
</tbody>
</table>
• To review information for a specific plan, Click on the plan number

<table>
<thead>
<tr>
<th>Date</th>
<th>Plan Number</th>
<th>Description</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
</table>
Specific Plan Review

• Once a specific plan is chosen, the following information will be displayed.

Record 2-18EM-00160-SHA:

Notice of Emergency Timber Operations

Record Status: Validated

Record Details

Licensed Professional:
STEVE WILLS TRUCKING & LOGGING LLC
PO BOX 335
FORTUNA, CA, 95540
Phone: 707-768-3781
LTOA A8780

Project Description:
SPI - Delta Fire - Little Boulder

View Additional Licensed Professionals>>

More Details
To get additional information about the plan, Click on the “Record Info” link.
Record Details

• Record Details include License Professionals and Contacts

• The “Application Information” and “Application Information Table” contains different types of data depending on the document type

• Click on the + sign next to label to see details
The Processing Status section shows the steps the plan has gone through.

- **Intake**: Due on 11/08/2018, Marked as Submitted on 11/08/2018
- **Review Team Verification**: Due on 11/15/2018, Marked as Verified on 11/08/2018
- **Archaeologist Verification**
- **Review Team Decision**
- **Send Letter**
- **Completion and Stocking Report**: Complete
Related Records

• CalTREES creates a structure below the main document number and these items are called Related Records

• To view details about Related Records, click the “View” link next to item
Attachments

- Attachments are documents that pertain to the plan
- To view attachments, click on the name of the attachment to view

<table>
<thead>
<tr>
<th>Attachment Name</th>
<th>Attachment Type</th>
<th>Record ID</th>
<th>Record Type</th>
<th>Entity Type</th>
<th>Latest Update</th>
</tr>
</thead>
</table>

Attachments below are associated to the selected Record and it's Child Records. To download the attachment for viewing click on the "Attachment Name", or click on the "Action" menu for additional information.

To sort the Attachments list click on the column header of your choosing to toggle between ascending or descending order.

The maximum file size allowed is 250 MB.
• Six Online Reports are available on Home page
• Review Reports require Region and Date; results will include plans in 7 days preceding date entered.
• NOS-NOR reports required Region and a Date Range
• THP Status report does not require any input parameters
Questions? Please contact the CalTREES HelpDesk at CalTREES.Support@fire.ca.gov

Frequently Asked Questions: http://www.fire.ca.gov/resource_mgt/CalTreesFAQs

Join our email list to receive future announcements: AB 1492 List Serv

Coming soon:
- Additional Outreach, Beta Testing and Training sessions
- Centralized CalTREES website, where you can access the latest project news, upcoming events
Questions / Input