



California Timber Regulation and Environment Evaluation System

User Guide Search and Review Features

Version 1.0

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1.0 Access to CalTREES Web Portal

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

Figure 1 - CalTREES Home Page, is the layout of the CalTREES home page. This page has four main areas:

- 1) Link to Search home page - **Click** on “Search” magnifying glass,
- 2) second link to Search home page - **Click** the words “Search Timber Harvest Documents”,
- 3) Link to CalTREES support team email address as well as access to the CalTEES FAQs - **Click** on “Contact Us”
- 4) Link to CalTREES reports - **Click** on the down arrow next to “Reports” and a list of reports will be displayed and then **Click** on the report you would like to run. See section “2.0 Reports on Search Home Page” for more details on the reports

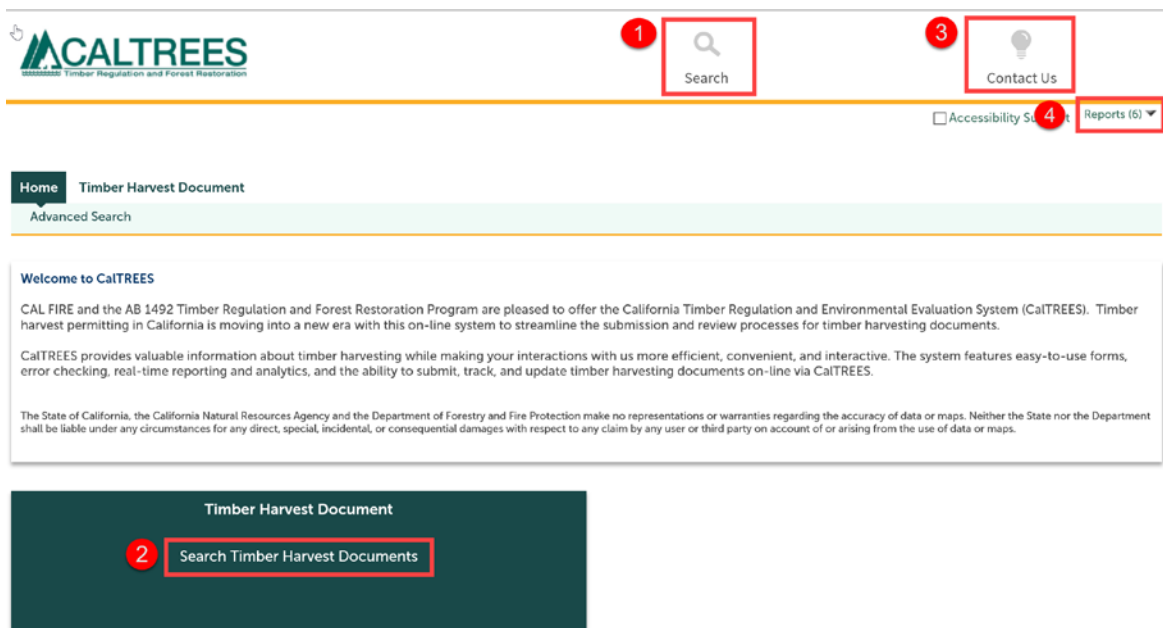
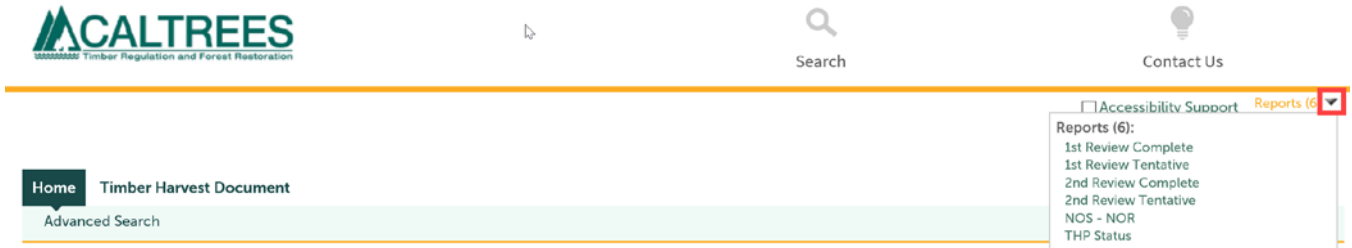


Figure 1 - CalTREES Home Page

If you have any questions about using the CalTREES Search Page, please contact the CalTREES HelpDesk at CalTREES.Support@fire.ca.gov.

2.0 Reports on Search Home Page

To get to the online reports, **Click** on the arrow next to “Reports” on the CalTREES home page or the Search home page. Once you click on the arrow, a list of reports will be displayed. **Click** on the name of report that you would like to run. Once all parameters are entered, **Click** submit to run the report.



2.1 1st Review Complete Report

Provides a list of all First Reviews completed in the specified week. The CAL FIRE Region number and a date must be provided. The report will extract the First Reviews completed in the seven days before the end date provided.

2.2 1st Review Tentative Report


Provides a tentative list of First Reviews that will take place during the specified week. The CAL FIRE Region number and a date must be provided. The report will extract the tentative First Reviews scheduled in the seven days before the end date provided.

Input Parameters for all Review Reports

Please input report parameter(s):

* Region: 1=Coast, 2=Casc, 3,4=Sierra:

* For week ending on:



2.3 2nd Review Complete Report

Provides a list of all Second Reviews completed in the specified week. The CAL FIRE Region number and a date must be provided. The report will extract the Second Reviews completed in the seven days before the end date provided.

2.4 2nd Review Tentative Report

Provides a tentative list of Second Reviews that will take place during the specified week. The CAL FIRE Region number and a date must be provided. The report will extract the tentative Second Reviews scheduled in the seven days before the end date provided.

2.5 NOS – NOR (Notice of Submission and Notice of Recirculation) Report


Provides the official list of NOS and NORs that occurred during the specified time period. The CAL FIRE Region number and the start and end dates must be provided. In diagram on right is the list of parameters that need to be entered for this report:

Input Parameters for NOS-NOR Reports


Please input report parameter(s):

* Region: 1=Coast, 2=Casc, 3,4=Sierra:

* For period beginning on:



* For period ending on:



2.6 THP Status Report

Provides a list of the timber harvest plans that are currently being processes. No input parameters are required.

3.0 Search Home Page

To reach the Search Home Page, **Click** on: 1) “Search” magifying glass **or** 2) the words “Search Timber Harvest Documents”.

3.1 Search Criteria

All items on the search page can be used as search criteria. Figure 2 - 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 can be found for items that have a question mark next to the item (?). **Click** on the question mark next to the item and additional information about the search field will pop up.

Once all search criteria has been entered, **Click** the “Search” button. To clear the search paramaters entered on the search screen, **Click** the “Clear” button.

The screenshot shows a search form titled "General Search" with the following fields and callouts:

- 1**: Record Number (text input)
- 2**: Record Type (dropdown menu)
- 3**: Record Status (dropdown menu)
- 4**: Record Created Start Date (calendar icon)
- 5**: Record Created End Date (calendar icon)
- 6**: Project Name (text input)
- 7**: Legal Description (text input)
- 8**: Watershed Identification Number (text input)

At the bottom of the form are "Search" and "Clear" buttons.

Figure 2 - CalTREES Search Criteria

3.2 Wildcard Searching

The CalTREES application has a wildcard character (%) that can be used to assist with searching for plans in CalTREES. The wildcard can be used in the text fields, but can't 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 times in a search field to assist in narrowing down the search results.

3.3 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 and NTMP. Please note Type is not used for THP
- **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**”

3.4 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 your 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 Status' 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 Status' and their definitions.

3.5 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. Please 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.

3.6 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” anywhere 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”

3.7 Legal Description Search

When searching by the Legal Description, there is a very specific format that must be used. The format is [Meridian][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 ## represents a 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:

What you are searching for	Enter This Value	Notes
Mount Diablo, Township 16N	M16N%	
Mount Diablo, Township 16N, Range 10W	M16N__10W	
Mount Diablo, Township 16N, Range 10W, and Section 3	M16N__10W__3	2 spaces between Township and Range and since Section is only one digit, 3 spaces between Range and Section
Mount Diablo, Township 6N, Range 10W, and Section 12	M06N__10W__12	2 spaces between Township and Range, 2 between Range and Section
Any Meridian, Township 16N, Range 4W and any Section	%16N__04W%	2 spaces between Township and Range
Only Humboldt Meridian	H%	
Humboldt, any township, Range 5E, and Section 10	H%05E__10	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 chosen and reviewed. See Section 5 – Reviewing Plans for details on how to review the details of a specific plan. In short, once a plan is chosen, 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 chosen plan.

3.8 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 - If you would like 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.
 - 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 enter “6532%01”

Once search results are found, to see the actual Watershed field for a specific plan, a specific plan must be chosen and reviewed. See Section 5 – Reviewing Plans for details on how to review the details of a specific plan. In short, once a plan is chosen, 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.

4.0 General Search Results

4.1 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 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.

Showing 1-50 of 272 | [Download results](#)

<input type="checkbox"/>	Date	Document Number	Type	Application Name	Status
<input type="checkbox"/>	11/08/2018	2-18EM-00160-SHA	Notice of Emergency Timber Operations	SPI - Delta Fire - Little Boulder	Validated
<input type="checkbox"/>	11/08/2018	2-18EM-00162-SHA	Notice of Emergency Timber Operations	Shasta-Cascade - Delta Fire - Boulder Creek	Validated
<input type="checkbox"/>	11/08/2018	2-18EM-00159-SHA	Notice of Emergency Timber Operations	Michael, John and Sharon Oconnell - Delta Fire	Validated
<input type="checkbox"/>	11/08/2018	2-18EM-00161-SHA	Notice of Emergency Timber Operations	SPI - Delta Fire - Little Boulder (2)	Validated
<input type="checkbox"/>	11/08/2018	2-18EM-00163-SHA	Notice of Emergency Timber Operations	Reenan - Delta Fire	Validated

4.2 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.

5.0 Reviewing Plans

To select a specific plan, **Click** on the document number link of the plan you would like to review.

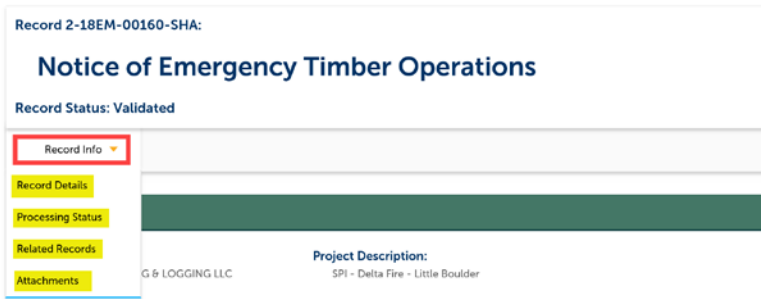
<input type="checkbox"/>	11/08/2018	2-18EM-00160-SHA	Notice of Emergency Timber Operations	SPI - Delta Fire - Little Boulder	Validated
<input type="checkbox"/>	11/08/2018	2-18EM-00162-SHA	Notice of Emergency Timber Operations	Shasta-Cascade - Delta Fire - Boulder Creek	Validated

5.1 Specific Plan Review

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

The screenshot shows a web interface for reviewing a specific plan. At the top, there is a breadcrumb trail: Home > Timber Harvest Document. Below this is a search bar labeled "Search Timber Harvest Documents". The main content area displays the record ID "Record 2-18EM-00160-SHA:" followed by the title "Notice of Emergency Timber Operations" and the status "Record Status: Validated". A "Record Info" dropdown menu is visible. Below this is a section titled "Record Details" which is divided into two columns: "Licensed Professional:" and "Project Description:". The "Licensed Professional:" column lists "STEVE WILLS TRUCKING & LOGGING LLC", "PO BOX 335", "FORTUNA, CA 95540", "Phone: 707-768-3781", and "LTOA A8780". The "Project Description:" column lists "SPI - Delta Fire - Little Boulder". At the bottom, there is a link "View Additional Licensed Professionals>>>" and a "More Details" link.

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



5.2 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.

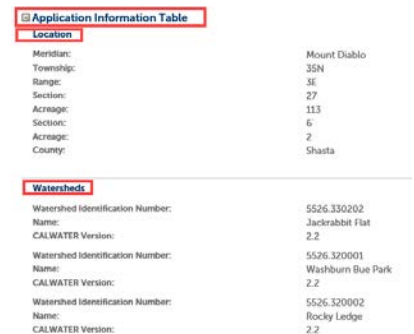


5.3 Application Information

When reviewing the parent record, you can **Click** on the plus sign (+) next to the “Application Information” and information such as total number of acres will be displayed.

5.4 Application Information Table

When reviewing the parent record, you can **Click** on the plus sign (+) next to “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.



5.5 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

To see more details about the step, **Click** on the arrow next to the step name. In the example, all steps up to Completion and Stocking Report are complete. The Review Team Verification step has been highlighted to show the due date of the task and when it was completed.

Processing Status

- ✓ ▾ 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

5.6 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 timber harvest plan. To view details about Related Records, click the “View” link next to item.

Related Records

[View Entire Tree »](#)

Document Number	Type	Application Name	Date	View
2-18-00150-SHA	Timber Harvest Plan	McCumber	11/15/2018	
2-18-00150-SHA-REVIEW	THP Multi Agency Review	Review Form for THP:2-18-00150-SHA	11/15/2018	View
2-18-00150-SHA-GEN	Sec 1 General	McCumber	11/15/2018	View
2-18-00150-SHA-SILV	Sec 2 Item 14 Silviculture	McCumber	11/15/2018	View

Now, the information in the “Application Information” and “Application Information Table” will pertain to the Related Record chosen.

5.7 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 that you would like to view.

Attachments

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 informa

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.

Attachment Name	Attachment Type	Record ID	Record Type	Entity Type	Latest Update
/Reports/EMAcceptanceLetter_20181109_101657.pdf	Acceptance Letter	2-18EM-00160-SHA	Notice of Emergency Timber Operations	Record	11/09/2018
20181109_2-18EM-00160SHA.pdf	Harvest Document Image	2-18EM-00160-SHA	Notice of Emergency Timber Operations	Record	11/09/2018

6.0 Appendix A

6.1 Search Criteria Definitions

- 1) **Record Number** – harvest document number
- 2) **Record Type** – list of all plan types; can only select all types or one specific type
- 3) **Record Status** – values are based on Record Type and must choose Record Type for a list of values to be displayed
- 4) **Record Created Start Date** and 5) **Record Created End Date** – represents the date range the plan was submitted
- 6) **Project Name** – Project Name assigned to harvest document by submitter
- 7) **Legal Description** - the Meridan, Township, Range and Section where plans reside
- 8) **Watersheds** - Watersheds in California that average between 3,000 and 10,000 acres are identified by CALWATER planning watershed numbers.

6.2 Common Record Status Definitions in CalTREES

Record Status	Definition
Approved	Has been approved and ready for operations
Closed	Plans that were returned, withdrawn, denied, not approved and not resubmitted.
Denied	CAL FIRE determined the plan is not in compliance
Director Decision	15 working days that Director has to approve plan
Filed	Plan has been submitted to CAL FIRE
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 by Plan Submitter prior to determination of conformance.

6.3 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

6.4 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		

6.5 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