



United States Department of the Interior



BUREAU OF LAND MANAGEMENT

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IN REPLY REFER TO:
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SEP 25, 2015

EMS TRANSMISSION 09/28/2015
Instruction Memorandum No. OR-2015-037
Expires: 09/30/2018

To: All Oregon/Washington Employees

From: State Director, Oregon/Washington

Subject: ePlanning Phase 1 Implementation Minimum Standards for
Oregon and Washington

DD: Dec 4, 2015

Program Area: Resources and Planning.

Purpose: This instruction memorandum (IM) establishes policy and minimum standards for the October 1, 2015, Phase 1 deployment of ePlanning in Oregon and Washington for all National Environmental Policy Act (NEPA) and land use planning (LUP) documents. This IM also includes a data request for all offices to identify previously established NEPA numbers that are to be duplicated within ePlanning (Attachment 1).

Policy/Action: In accordance with Washington Office (WO) IM 2014-106, Oregon/Washington (OR/WA) Bureau of Land Management (BLM) developed a state-specific ePlanning phased deployment plan. All offices will fully implement ePlanning Phase 1 beginning **October 1, 2015**. With the initiation of Phase 1, ePlanning will become the primary public access point and repository for all BLM-created Determinations of NEPA Adequacy (DNA), Environmental Assessments (EA), Categorical Exclusions (CX), and Environmental Impact Statements (EIS) and all resulting decision documents including Findings of No Significant Impact (FONSI), Decision Records (DR) and Records of Decision (ROD) to the NEPA Register. Completion of Phases 2 and 3 is scheduled for October 1, 2016.

The National ePlanning NEPA Register will replace the existing OR/WA NEPA webpage as the host of planning and NEPA documents. After October 1, 2015, new projects may not be entered into that webpage. The OR/WA BLM will continue to maintain the system and provide internal and public access to the records contained on that webpage as a library/archive for planning and NEPA documents completed during the 2009-2015 timeframe.

Full implementation of ePlanning Phase 1 shall be defined as follows:

1. All BLM offices in OR/WA will use ePlanning to obtain NEPA numbers and, in a timely manner, post all NEPA documents including DNAs, CXs, EAs, EISs, and

associated determination and decision documents (FONSI, DRs, and RODs) for all projects initiated after October 1, 2015. All documents will be posted in .pdf format. All posted documents will be 508 Compliant.

2. All BLM offices in OR/WA will utilize the ePlanning NEPA Register to announce the current status of all projects. Project status descriptors include:
 - Closed
 - Comment and Review Period
 - Completed
 - Decision and Appeal
 - Final EIS (non LUP)
 - PRMP – Protest and Resolution
 - Preparation and Planning
 - Public Scoping
 - Withdrawn
3. For purposes of this IM, “timely” shall be defined as: posted on the ePlanning Register before or concurrently with notification or distribution to known interested parties.

For ease of public use, the OR/WA BLM will replicate in the ePlanning NEPA Register previously completed documents for projects with decision documents that will be signed after October 1, 2015. Attachment 1 to this IM contains instructions to offices for requesting the creation of NEPA numbers within ePlanning for previous years. The objective of these instructions is to develop a consolidated request from OR/WA to the National Operations Center (NOC) to establish backdated NEPA numbers for ongoing projects and historic documents that are frequently utilized to support tiered analysis, determinations, and decision-making. The deadline for submitting these requests is **December 4, 2015**. Please contact Leslie Frewing in the Oregon State Office (OSO) if you need a backdated NEPA number created on an accelerated timeline to support decision-making in the first quarter of Fiscal Year (FY) 2016

There is no requirement to utilize the ePlanning NEPA Register for projects for which the OR/WA BLM has already made a decision.

Full implementation of ePlanning does not replace or preclude offices from using existing public notification processes or highlighting or publishing planning related notices, press releases, or other documents on their district-specific, public webpages.

Attachment 2 establishes the minimum content standards for the various document types. Requirements increase as projects have greater documentation requirements and public involvement. The attachment is organized from least to most complex and each level includes the requirements of the earlier levels.

All projects must have the following roles assigned to individuals: Project Creator, Team Lead, Project Administrator, Planning and Environmental Coordinator (P&EC), and Public Affairs Official. Individuals may be assigned multiple roles on individual or multiple projects.

Each office shall assign at least one individual and a backup to the Public Affairs Official role for all projects. These individuals shall be responsible for ensuring that all content posted to the publicly accessible portion of ePlanning meets the minimum standards outlined in this IM and instructions issued in subsequent IMs.

Each office shall assign at least one individual and a backup to the Project Administrator role for all projects. These individuals shall be responsible for ensuring that all content posted to the publicly accessible portion of ePlanning meets the requirements of BLM Planning and the NEPA program.

Timeframe: Effective immediately.

Budget Impact: The transition to ePlanning will have a limited reduction in agency efficiency as individuals become familiar with the software requirements. An estimated 150 ongoing and historic projects already posted on the existing OR/WA BLM Planning and NEPA Register will be replicated in ePlanning. This process is not automated and will require an estimated total of 150 hours between Oregon and Washington, the NOC, and the ePlanning contractor. Additional training costs and temporary efficiency reductions are anticipated as subsequent phases are implemented in out-years. Long-term benefits of the national ePlanning system are anticipated to outweigh these short-term costs and efficiency reductions.

Coordination: Suggestions for the content of this IM were solicited at presentations to the 2015 Field Users Group Meeting on April 28, 2015; the OR/WA P&EC Workshop on May 6, 2015; and the OR/WA District P&EC Monthly Conference Call on September 15, 2015. In addition, review opportunities were provided to key OSO staff in the following program areas: Planning and NEPA, GIS, Web Services, and Public Affairs.

Contacts: Please direct questions or comments to Leslie Frewing, Planning Coordinator, OSO, at 503-808-6088 lfrewing@blm.gov.

Districts with Unions are reminded to notify their unions of this IM and satisfy any bargaining obligations before implementation. Your servicing Human Resources Office or Labor Relations Specialist can provide you with assistance in this matter.

Signed by
Theresa M. Hanley
Associate State Director

Authenticated by
K. Wentworth
Records Section

Attachments:

- 1 – Request for creation of back-numbered NEPA projects within ePlanning, 2 pp
- 2 – Minimum Content Standards for ePlanning, 3 pp

Distribution

WO210
NOC DRS (Roxanne Falise)
OR955.3 (Records)

Request for Creation of Back-numbered NEPA Projects within ePlanning

Due Date: December 4, 2015

The Oregon State Office (OSO) strongly recommends using the ePlanning NEPA Register to post previously completed documents for projects with decision documents that will be signed after October 1, 2015. The objective of these instructions is to develop a consolidated request from Oregon/Washington to the National Operations Center (NOC) so that districts may request creation of NEPA numbers within ePlanning for completed documents that are frequently utilized to support tiered analysis, determinations, and decision-making.

The NOC has provided instructions for requesting back-numbered projects:

- Step 1: Determine which ongoing and historic documents your office wants to add to the ePlanning system.
- Step 2: Create a new project in ePlanning in the same fiscal year as the already established NEPA number. The ePlanning System will require entry of all required data for each project.
- Step 3: The ePlanning System will assign a sequential number to the newly created project. This number will not match the existing NEPA number. You may upload documents in Back Office at this time or after the corrected number is assigned.
- Step 4: Complete the table on page 2 for all projects in your district. Submit the table to Leslie Frewing (lfrewing @blm .gov) by **December 4, 2015**. The OSO will submit a consolidated request for the renumbering of projects to the existing NEPA numbers to the NOC.
- Step 5: Based on the request submitted, the NOC will work with the contractor to replace the ePlanning assigned NEPA number to the existing NEPA number previously established for each project.
- Step 6: Once the corrected NEPA numbers are entered, offices will be notified. At that time, offices may upload associated documents and move the project pages from Back Office to the NEPA Register where they will be accessible to the public.

Minimum Content Standards for ePlanning

Creating a Project

Use the following minimum standards when entering information into the fillable form within ePlanning Webtop to create a Project Page.

Project Creator	Typically the project lead, but districts may assign this responsibility to a single point-of-contact.
Project Status	Select Closed, Comment and Review Period, Completed Decision and Appeal, Final EIS (non LUP), PRMP – Protest and Resolution, Preparation and Planning, Public Scoping, or Withdrawn.
Department	“DOI” auto-fills.
Agency	BLM is the default.
State	ORWA
County(ies)	Select one or many from the pick-list.
Office Location(s)	Select one or many from the pick-list.
Lead Office	Required, even if only one office selected from above. Pick-list.
Project Type	EA, DNA, CX, EIS, RMP, RMPA, etc.
FY of Initiation	Backdating is possible through the NOC. See Attachment 1.
NEPA Number	System assigned sequentially, unless a request is submitted to the NOC.
Project Name	132-character limit.
Project Description	Short description that identifies the geographic location, analysis area, and proposed action. Other important project-specific information not included elsewhere in the form may be added.
Applicant	If applicable.
Project Location	Lat/Long point at the approximate center of the project area. Not the office location. For large or multi-site projects, select the approximate center. The point established has no utility outside of ePlanning thus should not be linked to BLM’s corporate GIS layers.
Plan Conformance	Select YES, except for RMP Revisions, RMP Amendments, and projects with proposed Plan Amendments. Interpreted as, “YES, plan conformance is required for the type of document being prepared.”
Applicable RMP(s)	The applicable RMP(s) for the project area. For RMP Revisions, select the current RMP(s).
Programs	Select one or many from the pick-list. Used within ePlanning to search by the project type.
Role Assignment(s)	ePlanning requires the following roles be assigned: Project Creator, PAO, Team Lead, Project Administrator, P&EC. Other roles may be assigned but are not required. Individuals may be assigned multiple roles, and a single role may be assigned to multiple individuals.

Cooperating Agencies	List Cooperating Agencies when an MOU is signed. In the future, this data could be used to respond to the annual Data Call for Cooperating Agencies.
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Project Summary Pages

Offices may use the Project Summary page template for CXs, DNAs, and minor project EAs with minimal public outreach and review activities. Use the following minimum standards utilizing a fillable form within ePlanning Webtop to create a Project Page.

Project Description	Short description that identifies the geographic location, analysis area, and proposed action. Highlight any new documents released and the applicable comment and appeal periods – including where to send comments/appeals. Other important project-specific information not included elsewhere in the form may be added.
Project Location	A narrative description of the project location. This is in addition to the Lat/Long point at the approximate center of the project area established during Project Creation.
Other Documents	When using the Project Summary page for DNAs, upload the supporting EA/EIS utilized by the DNA into the Other Documents section unless the supporting EA is already posted in ePlanning. In cases where the supporting EA/EIS is posted in ePlanning, refer to the assigned NEPA Number and Project Name in the Project Description.

Project Specific Web Pages

Offices are required to create Project Specific Web Pages for EAs with public scoping periods, substantive public outreach activities, or voluminous supporting documentation. Project Specific Web Pages are required for all RMP Revisions, RMP Amendments, and Project EISs. Use the following minimum standards for each section when creating Project Specific Web Pages.

Home	Highlight any new documents released, any upcoming public meetings or tours, comment periods – including where to send comments. Districts are required to post all outreach products sent via e-mail or regular mail to the public. Offices are encouraged to post any press releases specific to the project.
Documents	Post all NEPA documents including DNAs, CXs, EAs, EISs, and associated determination and decision documents (FONSI, DRs, and RODs). All newsletters, updates, or meeting notes distributed to the general public. All documents will be posted in .pdf format. All posted documents will be 508 Compliant. Supplemental documents, such as inventory reports, Biological Opinions, and applicable programmatic documents, may also be posted. All past newsletters, updates, or meeting notes distributed to the general public. Current distributions can be highlighted or posted in their entirety on the Project Specific Home Page.

Contact Information	Offices must provide the office address and general phone number. A project-specific contact may be provided at the discretion of each respective office. It is recommended that the address and e-mail where comments should be sent be highlighted on the home page during comment periods.
How to get involved	Districts are required to post all public meeting and tour dates within ePlanning.
Maps	A preliminary project map (.pdf) must be posted in the maps section of the web page.
Links	This section shall also refer to any project-specific webpages maintained for distribution of information to the public.
FAQs	No minimum standard established by this instruction memorandum.

RMP Revisions and RMP Amendments: In addition to the standards above, the following minimum content standard is established for the Documents section for RMP and RMP Amendments:

- Notice of Intent
- Analysis of Management Situation
- Scoping Report
- Draft and Final EISs
- Protest Resolution Report
- Record of Decision