Montana Sage Grouse Web Application New Features:
Summary and Guide

August 2021 – February 2022
Release Notes

V3.9

MONTANA SAGE GROUSE
Habitat Conservation Program

Table of Contents

Introduction

The Sage Grouse Program contracted with the original developer of the Program's web application to update the website, add enhancements, the credit/debit registry, and other new features. These changes have been incorporated to the web application from 2020 through 2022. On a rolling basis, new features and updates were made available to developers, credit providers and the Program as they were developed and tested.

This document highlights those changes, as well as provide instructions and guidance to new and returning proponents about these new features and changes. This document is organized to explains updates and new features according to their sequence and location on the website and/or project submission form and chronologically to the extent possible.

General Changes for All Users

ATTENTION NEW Okta Login System

The login system for the web application has switched from ePass Montana to Okta.

Users will be directed to a sign in webpage (see image below) after clicking the Login button.

Existing Users currently with an ePass account will need to activate a new Okta account by entering their ePass username and password into the form shown in the image. (Your username is the same email address previously used with your ePass account.)
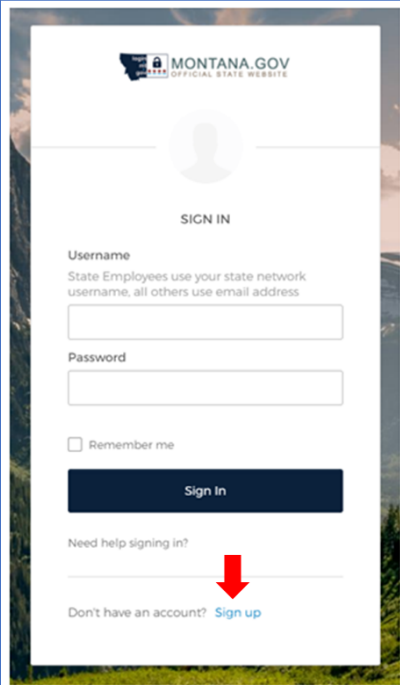
After the account is activated, users will receive an email containing a link to create a password for their new Okta account.

Users will now be able to login to the application using their email and new password.

OR

New Users who do not currently have an ePass account will need to click the 'Sign up' link (see below red arrow in image) to create an Okta account.

Alternatively, new users can also go to https://login.mt.gov to create an account or login via Microsoft, Google, or Facebook identity providers.

Print Feature for All Program Maps

External Program Home Page Map, Internal Home Page Map, Information Page -Step 1 Page
Program Map, Disturbance Page - Step 3 Maps, and Review and Submit – Step 6 Map
A new print option is available on any of the Program web application maps. The print tool lets you
print a map of your project in landscape, portrait, or custom view. You can also save the map as a
pdf.

Use your web browser print options to adjust the map scale, margins, or include headers or footers.
The legend in your printed map will include a map title, scale bar and all layers that have been
checked on in the map view.
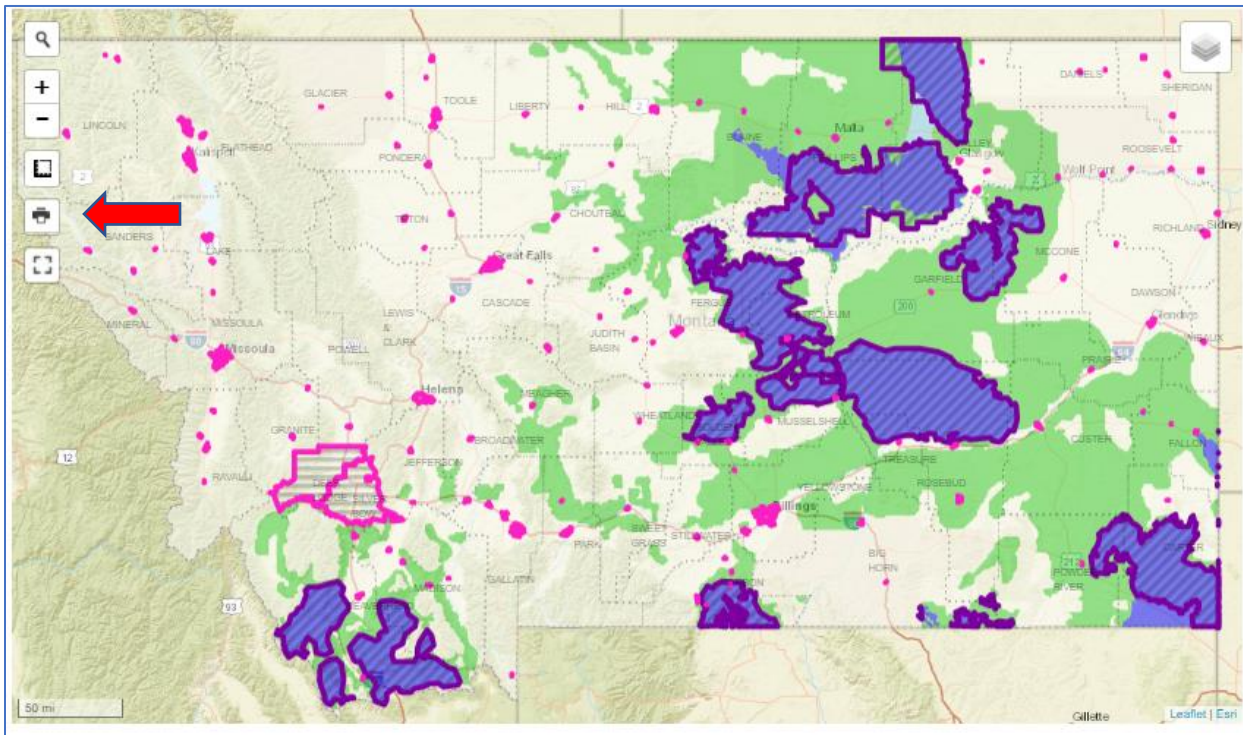
This can be a useful tool if you find your project is outside of sage grouse habitat and you need a
map to attach to your application showing the project location. You will need to draw or upload
spatial data to create a map showing your project location.

Printed Map
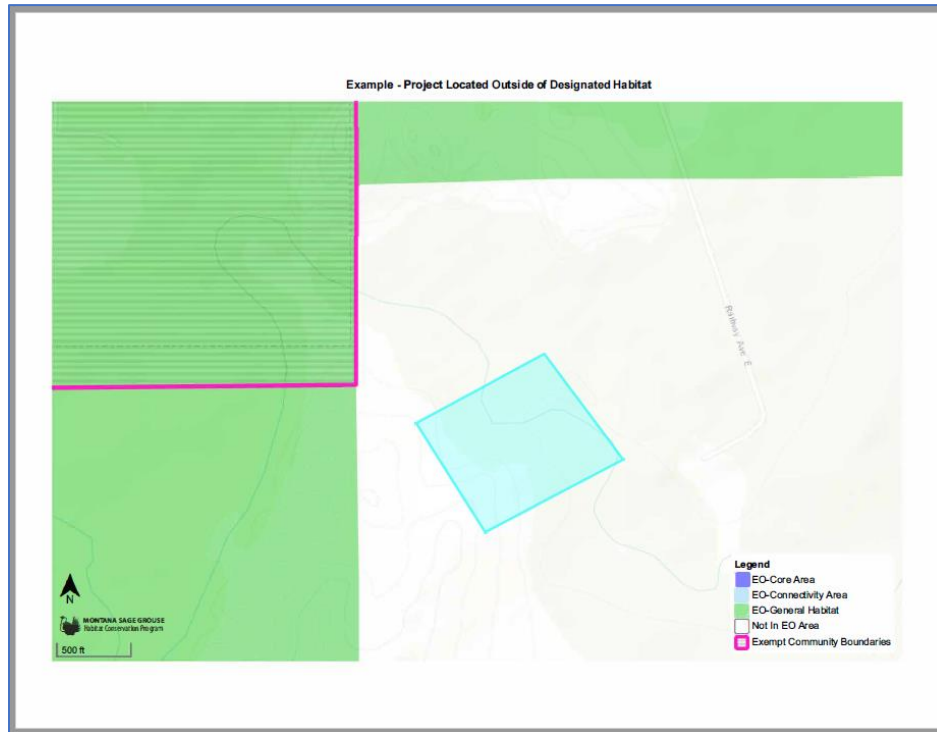
New Map Layers

NEW Basemap Reference Layer

The HQT Basemap reference layer has been added to the dropdown layers available to view on any of the Program maps. By using the HQT Basemap, developers and creditors can identify habitat quality within the direct footprint and areas adjacent to their project location. Warmer colors represent higher-quality sage grouse habitat, whereas cooler colors represent lower-quality habitat.
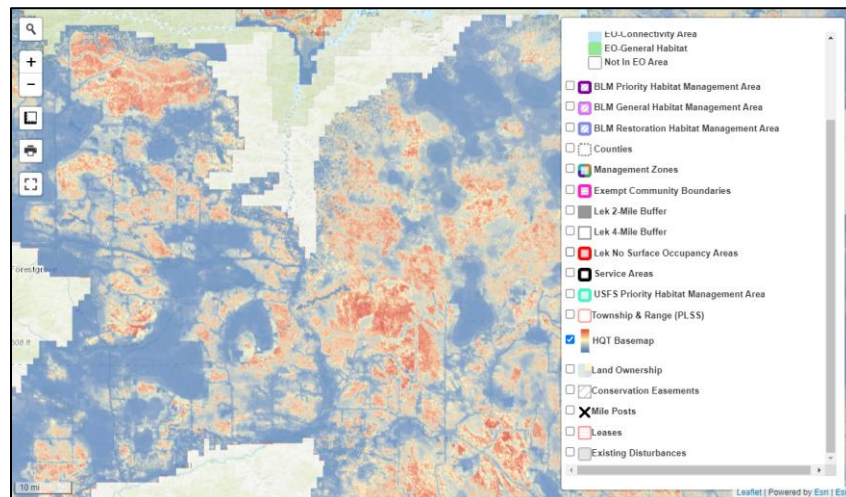
NEW Sage Grouse Buffers

Two-mile and four-mile lek buffer layers have been added to the dropdown layers available to view on any of the Program maps. Note that the two-mile lek buffer is applied to the No Surface Occupancy Area (NSO) for all leks and the four-mile lek buffer is applied to only the NSO's for Core Area leks.
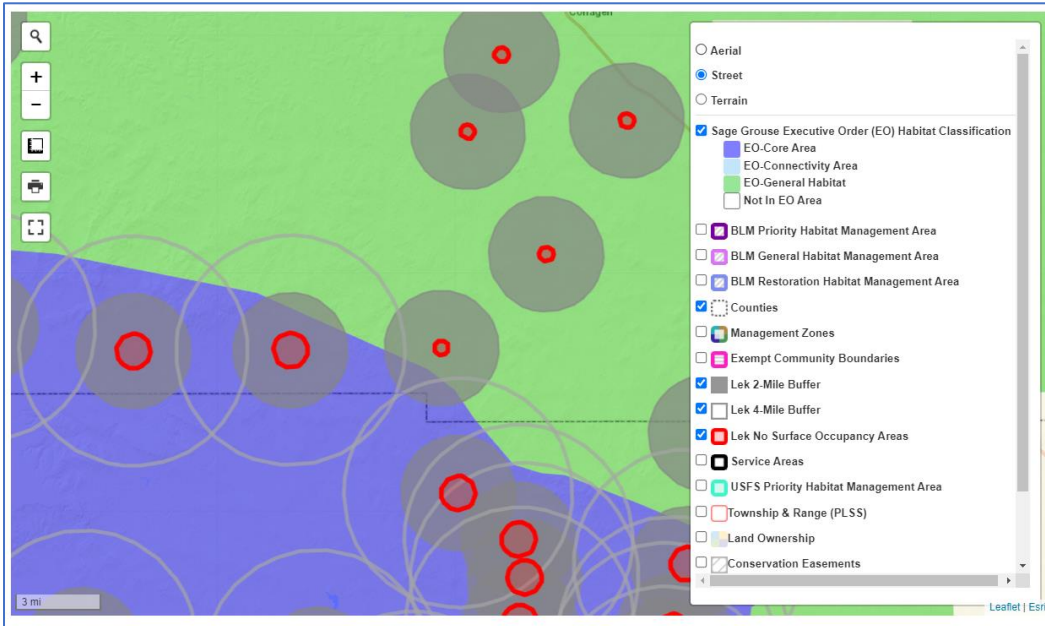

NEW Other Layers

Mile Posts, Conservation Easements, Service Areas and Lease layers have been added to the dropdown list of layers available to view on any of the Program maps.
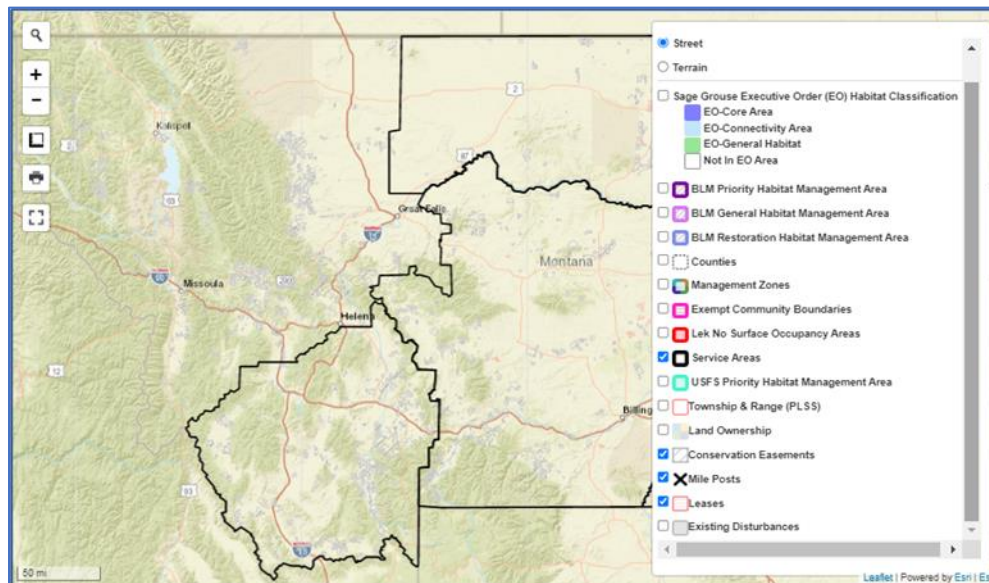
## NEW Point Feature Option

A developer can now choose to enter a point feature for infrastructure associated with certain project types. This infrastructure includes but is not limited to water supply wells, geoprobe sites, core holes, and bore holes.
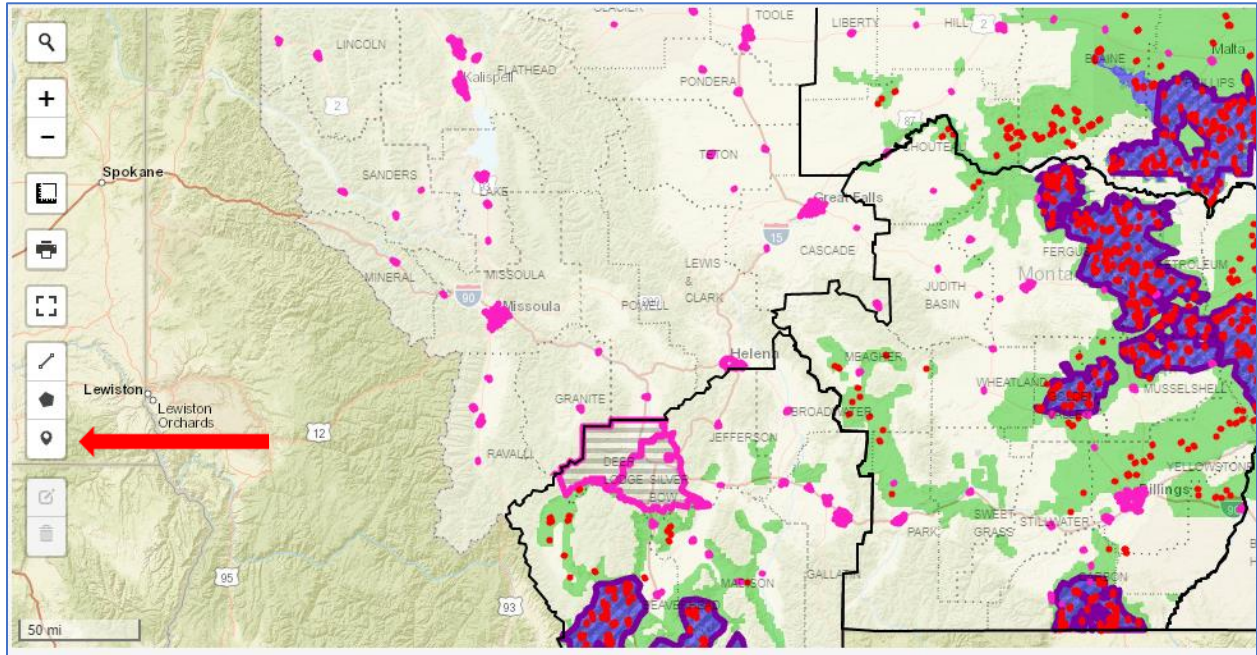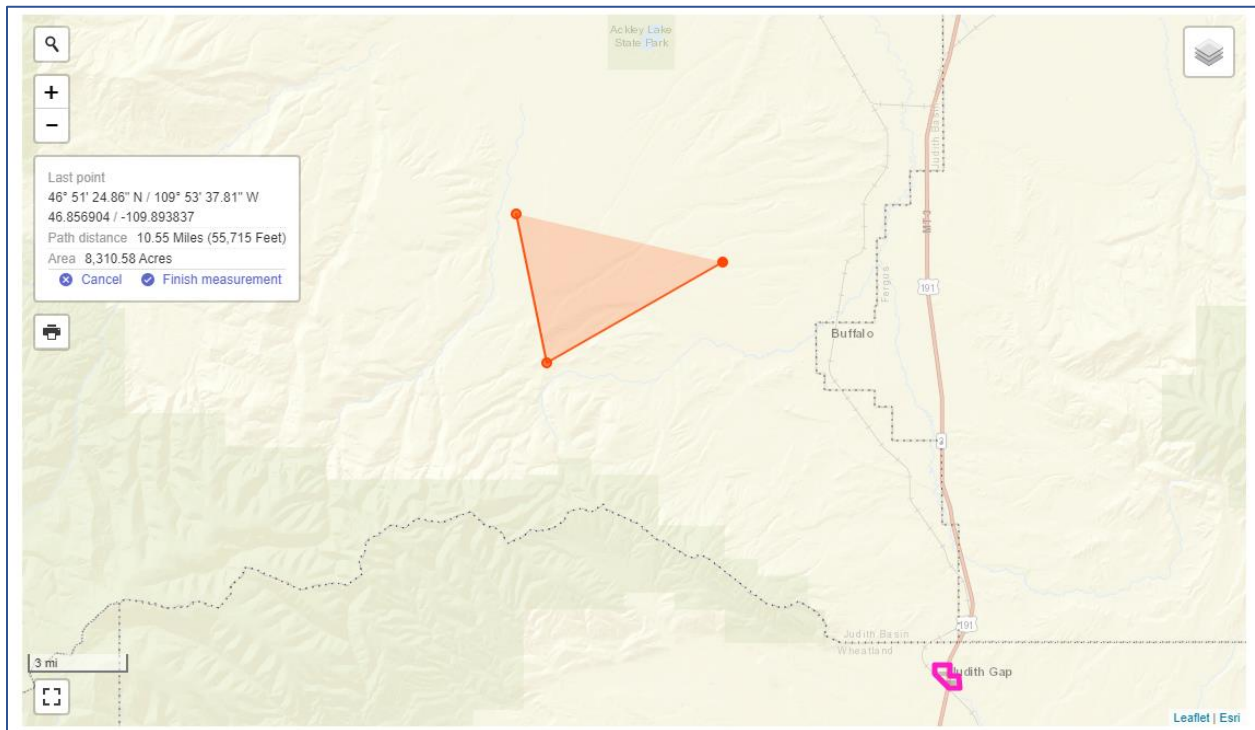

Map Measuring Tool

You will find this tool on any map element on the website, including those you see when submitting a development project.
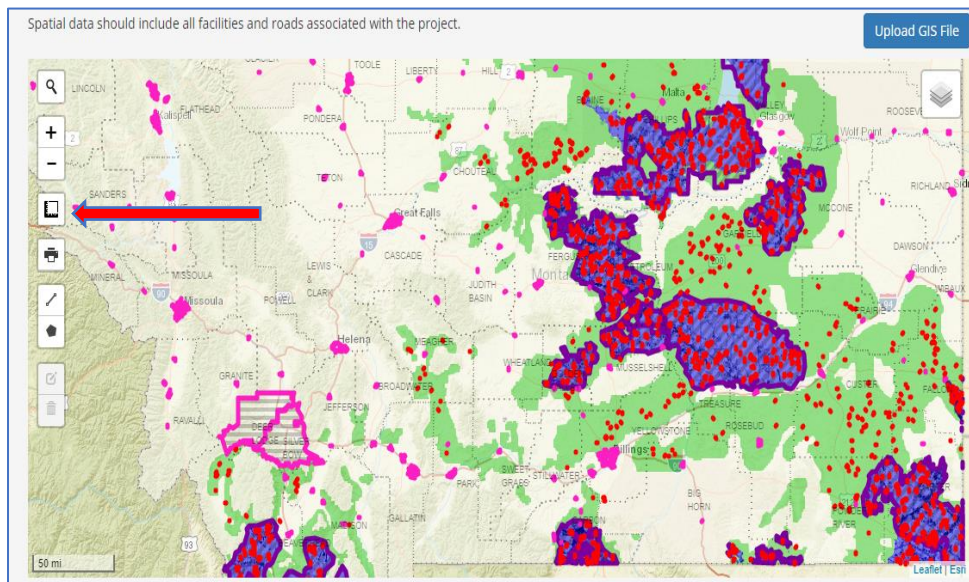
To measure distances or area on the map:
- Hover over the square ruler symbol below the zoom buttons and click Create a new measurement.
- Click on the map to start the distance measurement and click again to continue.
- Move your cursor to the end of the distance you want to measure.
- Click finish measurement and the line you have measured will remain until the page is refreshed. You will also be able to delete it.
- If you are measuring an area, click in shorter segments to create an outline of the area. Once 3 or more points are entered the area will begin to be calculated as shown in the screenshot below.
- The shaded area represents the shape of your feature and its area.

The Map Measuring Tool is included in both map elements on this page.

Scale Bar

A scale bar has been added to the lower left corner on all maps on the website. It will adjust automatically to the zoom level selected by the user.
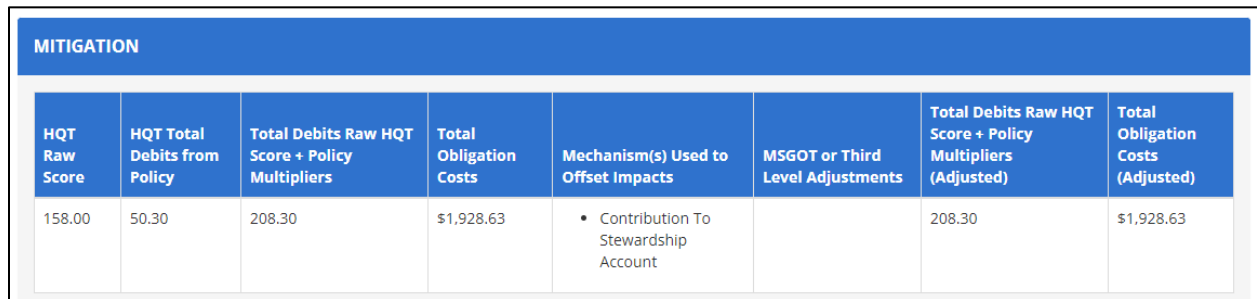
Reviewer Comments

If your project has been returned, look for comments and feedback from the Program Reviewer. Reviewer comments will be visible when you first re-open your project after receiving an auto-email that your project was returned. These comments will be saved in your project records.
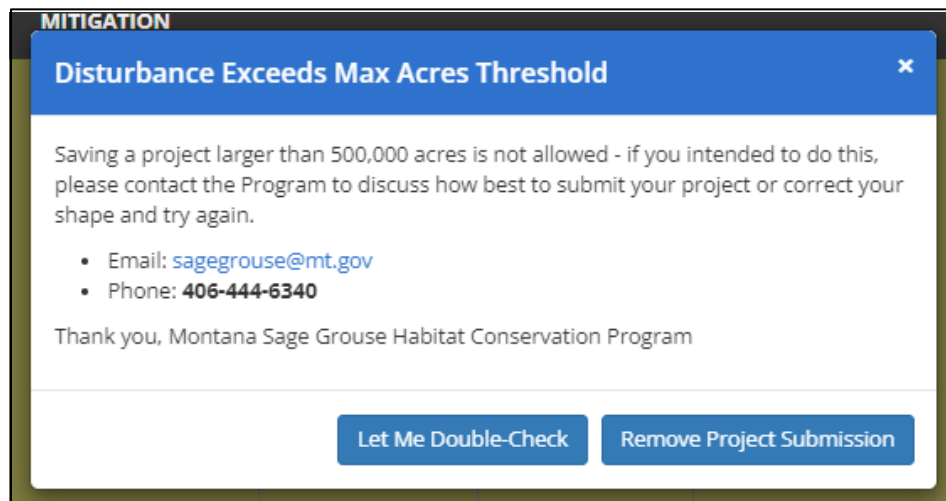

NEW Mitigation Results Summary

A table summarizing a project's mitigation results can now be viewed at the top of the project summary page.

MITIGATION							
HQT Raw Score	HQT Total Debits from Policy	Total Debits Raw HQT Score + Policy Multipliers	Total Obligation Costs	Mechanism(s) Used to Offset Impacts	MSGOT or Third Level Adjustments	Total Debits Raw HQT Score + Policy Multipliers (Adjusted)	Total Obligation Costs (Adjusted)
158.00	50.30	208.30	$1,928.63	• Contribution To Stewardship Account		208.30	$1,928.63

NEW Spatial Data Size Limitations

A proponent will no longer be able to save a project with spatial data larger than 500,000 acres. If you intend to do this, please contact the Program to discuss how best to submit your project.

Changes Specifically for Developers

Basics Page – Step 2

Look for the link to the Quick Start Guide document.

Selecting your Project Type is <u>very important</u>. The application is designed to tailor the questions the Program ask you to answer, based on the Disturbance Types associated with specific Project Types. If you select the wrong Project Type you won't be asked the appropriate questions. This can result in delays in reviewing your project. It is important that your project be categorized correctly for database management. If you are asked to correct the Project Type you selected, after you have submitted your project, all of your prior answers will be erased. This new feature should you select your Project Type.

Click on a Project Type to open the dropdown list.

A blue box appears that lists the Disturbance Types associated with the Project Type.

We encourage you to call the Program if you need assistance selecting a Project Type. If you don't see an appropriate Disturbance Type listed you should consider a different Project Type.

Timber Harvest, Conifer Removal and Habitat Treatments

Sometimes, timber harvest (e.g. removing conifers encroaching into sagebrush habitats) or other habitat treatment projects are designed and intended to improve sage grouse habitat. When, the intention is to restore or enhance sage grouse habitat, the project should be entered as a credit project even if the submitter is not interested in generating credits. **Do not submit timber harvest, conifer removal or habitat treatment projects as a development project** when it will restore or enhance sage grouse habitat. Go back to the main Program webpage and click "Credit Project" in the list under Projects.

Timber harvest or habitat treatment type project not specifically designed and intended to restore or enhance sage grouse habitat should be entered as a debit project. A timber harvest or habitat treatment such as fire or mechanical treatment will result in immediate changes to the landscape. Therefore, surface disturbance will occur as soon as the project is initiated.

The project entry should include Construction Phase Dates for the time span necessary to complete the harvest or treatment project. The Construction Phase Start date should be the month, day, and year when the project starts. The Construction Phase end date should be the month, day, and year corresponding to last day of timber harvest or habitat treatment implementation.

Operations Phase Dates should include the time span through to any proposed reclamation of project disturbances such as road stabilization or rehabilitation.

NEW Responsible Party Section

A Responsible Party section is now available in addition to the Project Contact Information section on the Basics tab.

We ask that you provide contact information for the party who will be responsible for any mitigation obligation that may be associated with your project. You may be the Responsible Party or you may need to supply the company name if you are submitting a project on behalf of a company or other party.

If the Responsible Party does not already exist in the drop-down list, a proponent can manually add one by checking the box below "Customer".

Questionnaire Pages – Step 4

You are asked to enter your project Construction Phase Dates and Operations Phase Dates. Projects that involve both construction and operations should include date ranges separated by phases. Projects with no construction phase or no operations phase are described below. (Please see **Date Ranges for Mining Project** and **Date Ranges for Buried Features)**. The following describes how to answer date ranges for most projects.

Construction Phase Dates

Project disturbance dates are separated into: (1)Construction Phase dates and (2) Operations Phase dates. We ask for specific dates including month/day/year. Separating these phases helps streamline the review process.

Construction Phase refers to the period of time of the initial phase of development or start of a project activity, when surface disturbance or disrupting activities are initiated for the first time. The Construction Phase ends when all construction is complete and the project transitions to implementation and is operational (i.e. transitions to the Operations Phase).

Construction Start date: Open the calendar and enter the month, day and year corresponding to the first date that construction would start.

Construction End date: Open the calendar to select the last month, day, and year when construction will be completed. Construction Phase dates should not overlap Operations Phase dates.

In this example, the project will be constructed starting on 01/29/2020. Construction activities will be completed on 04/30/2020.

Operations Phase Dates

Project disturbance dates are now being separated into: (1)Construction Phase dates and (2) Operations Phase dates. We now ask for specific dates. These changes will help streamline the review process and facilitate future incorporation of the Habitat Quantification Tool into the web application.

The Operations Phase refers to the period of time after the completion of the Construction Phase and prior to initiation of the Reclamation Phase. The Operations Phase corresponds to the length of time in which a development project is present and operational on the landscape and causes surface disturbance or disrupting activities.

Operations Start date: Open the calendar and enter the month, day and year corresponding to the first date that the project is fully implemented and operational (i.e. no longer under construction). Operations Phase dates should not overlap with Construction Phase dates. For example, do not enter the same month/day/year for the start date of the Operations Phase as the month/day/year of the Construction End date.

Operations End date: Open the calendar to select the last month, day, and year when the project will cease being implemented and operational. The end date for Operations Phase should be the date that those regular operations stop or if the permit you are obtaining will have an end date, use that for the Operations Phase end date.

In this example, the project will be constructed starting on 01/29/2020. Construction activities will be completed on 04/30/2020. The project will transition from the Construction Phase to the Operations Phase on 05/01/2020. Note that the dates do not overlap. The project will be implemented and operational on the landscape until 12/31/2025 – the last day of the Operations Phase.

Phased Timelines for Projects Having Multiple Features

Larger projects may have a phased schedule when implementing different features. Projects that are implemented in phases will likely have different Construction Phase dates and/or Operation Phase dates unique to each phase. When implementing a phased project, enter the appropriate Construction Phase dates and/or Operation Phase dates for each individual disturbance feature uploaded or drawn.

Maintenance Activities

For maintenance work on existing structures and facilities contribute to the longevity of an existing project but ordinarily do not create new and additional surface disturbance when otherwise no permit amendments are sought or needed to conduct the maintenance activity.

The Montana Sage Grouse Oversight Team will be working with state permitting and authorizing agencies to designate as exempt from the Habitat Quantification Tool certain operations and maintenance activities that require a permit or other authorization. Operations and maintenance activities that are designated as exempt from the Habitat Quantification Tool may still be subject to

stipulations, such as seasonal restrictions when those activities would occur near active sage grouse leks.

Therefore, proponents are asked to provide dates when maintenance activities would occur. This enables proponents and the Program to consider whether or not seasonal stipulations are applicable.

Maintenance activity dates should be entered as Construction Phase start and end dates.

To address the case of maintenance activities that are implemented within one calendar year and have a Construction Phase, but no Operations Phase:

- <u>Construction Phase Start date</u>: enter the month, day, and year corresponding to the day you want to begin maintenance activity.

- <u>Construction Phase End date</u>: enter the month, day, and year corresponding to date maintenance activity is to be completed.

- <u>Operations Phase Start date</u>: enter the month, day, and year that is one day after the Construction Phase end date.

- <u>Operations Phase End date</u>: enter the month, day, and year corresponding to Operations Phase start date so that the same month, day, and year applies to both the Operations Phase start date and the Operations Phase end date.

Date Ranges for Mining/Gravel Pit Projects

The following provides more specific guidance for mining operations and gravel pits. The activity typically goes directly into operations having no construction phase.

Mines and gravel pits typically do not have a Construction Phase. Mining activity (i.e. mining operations) can begin at the site as soon as the necessary permits are obtained. Therefore, mining and gravel pits typically do not have a Construction Phase. The first day the mining activity is proposed to start will be the beginning of the Operations Phase

The web application will recognize you have no construction phase if you choose mine or gravel pit for your Disturbance Type. The Construction Phase will be grayed out if you select mine or gravel pit.

To enter the Operations phase

<u>Operations Start date</u>: This is the date you propose to start mining. Enter the month, day, and year of the first day you propose to begin mining.

<u>Operations End date</u>: This is the day you intend to provide to DEQ Opencut as your final reclamation end date. Enter the month, day, and year corresponding with the intended reclamation

end date. The total number of years of Operations must match the time span for the life of the DEQ Opencut permit, including the **DEQ Opencut permit final reclamation end date**.

An important note: Also, the size of the proposed mining operation in acres (and spatial data) submitted to the Sage Grouse Habitat Conservation Program for review must match the information provided to the DEQ Opencut Program. The total number of acres provided to the Program must match the information on the DEQ Opencut permit application.

Date Ranges for Buried Pipelines/Cable or Other Buried Utilities

Buried features such as oil/gas pipelines, fiber optic cable, buried electrical lines, and agricultural water lines can be fully implemented (i.e. constructed) within one calendar year, with no infrastructure remaining on the surface. Once the feature is buried, but no additional or ongoing surface disturbance or disturbing activities are needed to "operate" the project. Therefore, buried features have a Construction Phase, but no Operations Phase. Once the buried feature is fully "constructed" there is no operations phase because within one growing season, the site is typically reclaimed either through active or passive means.

To address the case of buried features that are implemented within one calendar year and have a Construction Phase, but no Operations Phase:
- Construction Phase Start date: enter the month, day, and year corresponding to the day you want to begin construction activity to bury the feature.

- Construction Phase End date: enter the month, day, and year corresponding to date construction activity is completed. For larger pipelines or other projects that spanning multiple construction seasons, see Phased Project Special Case explanation above. For smaller scale projects like buried fiber or water pipelines that will be fully implemented within 1 year (including site reclamation), the construction end date should correspond to one year.

The web application will recognize you have no operations phase after you answer the first question for the feature. "*Will the pipe, powerline , or cable be above ground?* When you select **Buried** the Operation Phase Dates will then gray out with this message.

Operations Phase:	Start:	End:
How long will the project be on the landscape or how long will the activity occur? Enter the date the project transitions from construction to regular operations and the date regular operations or activities will stop. Construction Phase dates should not overlap Operations Phase dates.	⊞	⊞
	This feature is buried therefore operations dates are not required.	

Copy Responses for Like Disturbances

At the bottom left-hand corner of each disturbance questionnaire you will see a button that will allow you to copy the responses entered for the current disturbance to all other disturbances of the same type.

> Copy these responses for all Road disturbances
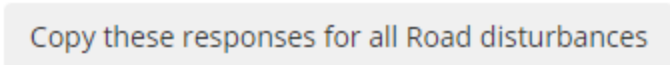
If you click on the "Copy" button, you will be asked to confirm that you want to copy this information for all other disturbances of the same type. Proponents are encouraged to review the

questions again to be sure that answers given apply to all other disturbances of the same type before using this tool.

The feature was added to bring efficiency to projects which have many of the same disturbance types (e.g. multiple buried fiber segments in the same project) and for which all the information is the same. Proponents should make sure to organize their spatial data and project information ahead of time to take advantage of this enhancement.
If you click "Confirm", your responses (i.e. answers to the questions) will be duplicated and added automatically for all other disturbances of the same type. The web page will reload, and you will be able to review the answers automatically entered. Review each individual answer. If you find an error or that an answer needs to be changed, enter the corrected information as you would normally. Be sure to click "Save".

If you click "Cancel", the answers will not be added automatically. You will need to enter the responses for each individual disturbance, even if they are the same type so that the information entered is accurate for each and every disturbance.
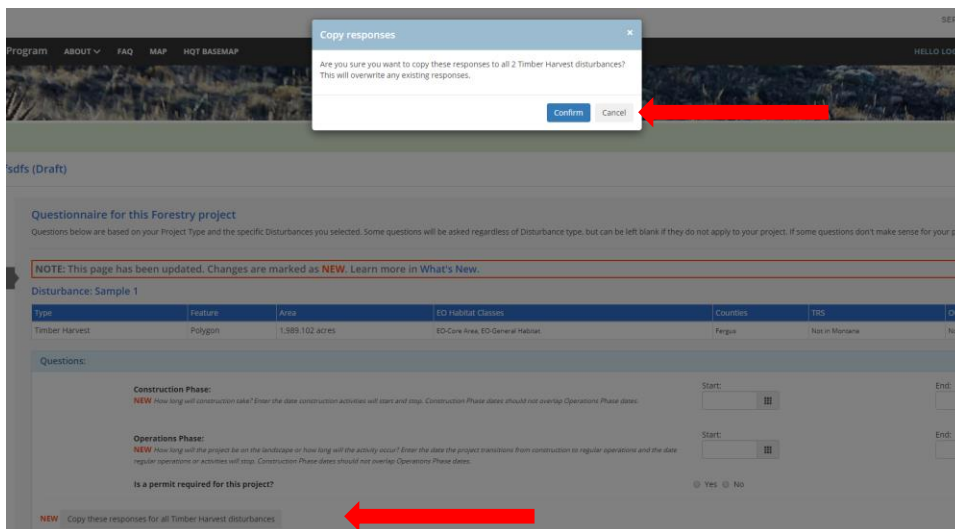
Attachments Page – Step 5

Additional Attachment File Types

Additional file types can now be uploaded as attachments. In addition, proponents will be able to indicate the category corresponding to what information the attached/uploaded file contains. See below for a list of the kinds of files proponents may need to provide to facilitate the project review process. Click "Other" for file attachments that do not fit in the categories explicitly included in the dropdown list.

Additional pointers:
- The maximum size of any individual uploaded file is 2gb.
- The types of electronic files (i.e. file extensions -- .pdf vs. .xls) listed after each category are preferred, but not strictly enforced.
- GIS shapefiles and geodatabases should be zipped before uploading

Batch Upload Attachments

It is now possible to upload more than one attachment at a time. To do this, click the "Choose Files"' button (outlined in red below) and navigate to folders on your computer where those files are located.
- Identify the files you wish to upload by highlighting the file and then pressing and holding the control button. Highlight and control/click each file you want to upload. See the file types in the screen shot below.
- Once you have all the files selected, confirm your selection and then select a type for the upload.
- Be sure to select a file type before clicking "Save" and moving to the next step.
- The files will be copied from your computer and uploaded to your project.
- You will be able to change the category, description etc. for each individual attachment.

The following screen shot shows what you should see after clicking "Save" when uploading multiple files.

Projects Detail Page

When you log onto your project, after it has been submitted, you will be directed to the Projects Detail Page. A summary of your project information is displayed here. A new **Disturbance Summary** Table has been added. This table provides a breakdown of the number or acres or length of your project within Habitat Classification and Surface Ownership.

DISTURBANCE SUMMARY

Crop

Total Acres		115.47 acres
Habitat Classification	EO-Core Area	13.61 acres
	EO-General Habitat	77.09 acres
	Not In EO Area	24.78 acres
Surface Disturbance		
Federal Habitat Classification	US Bureau of Land Management - General Habitat Management Area	33.52 acres
	US Bureau of Land Management - Priority Habitat Management Area	13.61 acres
Surface Ownership	Private	115.47 acres

Your project is also broken out by Township/Range/Section

Counties:	Madison
TRS:	Township 7 South, Range 6 West, Sections 15, 16, 17, 20, 21

TRS By Habitat Classification

EO-General Habitat

Township 7 South, Range 6 West, Sections 15, 16, 17, 20, 21

| Land Owner Information:	Montana State Trust Lands, Private, US Bureau of Land Management
Notes:	640 Acres

NEW Information Request

The Program has introduced a new Project Stage, Information Request will be used to move a project out of Due Diligence while the Proponent is making a decision about how to fulfill the mitigation obligation or implement permittee responsible mitigation. This stage could also be used when a Proponent is working with the permitting agency on NEPA or MEPA

Changes Specifically for Credit Providers and Stewardship Grants

NEW Conservation Project Side

We have developed a Conservation Project side to the web application similar to the Development Projects web pages. A user can create a credit project by selecting "Conservation Project" under the "New Project" dropdown.
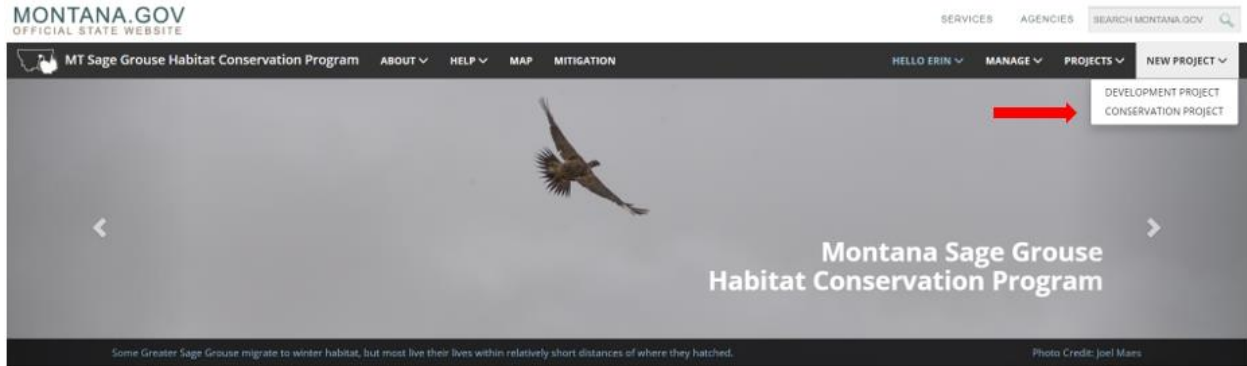
A project should be entered on the Conservation Project side if it preserves, restores, or enhances sage grouse habitat. For detailed guidance on conservation project criteria and submitting a conservation project, consult the Conservation Project User Guide for the Montana Sage Grouse Habitat Conservation Program Project Consultation and Review Website, can be found https://sagegrouse.mt.gov/