ForHealth

A guide to creating, managing, and searching Forest Health Project Accomplishments

This User Guide was written by the ForMAP Help Desk Team. Please notify us with questions or comments:

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Getting Started with ForHealth

Background

The Forest Health Project Accomplishments (ForHealth) web application was developed for U.S. Forest Service and its state and federal agency partners to create, edit, and report on Forest Health projects. Starting in Fiscal Year 2018, ForHealth replaces the FAD (Forest Health Protection Accomplishments Database) reporting system. The ForHealth application is a reporting module contained within USFS State and Private Forestry's Forest Mapping Accomplishment Portal – ForMAP.

The information provided in this guide is intended to show general functionality and requirements of the application. For guidance on project specifics and accomplishment reporting requirements, please refer to USFS Program Direction documents.

Creating an account

If you already have a ForMAP account and now expect to be reporting on Forest Health projects, you will need to request the role of ForHealth Project Editor. If you are USFS staff and will be adding funding information and approving/rejecting Projects, you'll need the ForHealth Project Approver role. You can do this by logging into ForMAP, and selecting the Request Authorized Changes button from the My Account page. This will send an email to the ForMAP Help Desk team to make the change.

If you do not yet have a ForMAP account, you will need to create one as described below.

To register for a ForMAP account you first need a USDA eAuthentication account. If you do not have one, you will need to create one during the process. The following are simple step-by-step instructions for requesting a ForMAP user account with ForHealth Project Editor permissions:

- Open your web browser and go to the ForMAP web application https://apps.fs.usda.gov/formap.
- 2. If you need to create an eAuthentication account, please follow the "Create an account" link on the eAuthentication page. A Level 1 account is sufficient to access ForMAP. After creating the eAuthentication account, you'll then register for a ForMAP account.
- Log into the ForMAP web application (https://apps.fs.usda.gov/formap) with your eAuthentication credentials (USDA employees may use their LincPass or eAuth Username and Password – both work).
- 4. Complete the ForMAP account request as follows:
 - A. Fill out the User Details section and select the appropriate Organization
 - i. USDA Forest Service (with Region if applicable) or
 - ii. Other federal agency (e.g. BLM, BIA, Commerce, DOD, DOE, Education, FWS, HHS, HS, HUD, Justice, Labor, NASA, NPS, State, Transportation, Treasury, Veteran's Affairs)
 - iii. State Forestry organization
 - B. For Employee Type, state partners should choose State Employee and USFS and other Federal agency personnel should choose Federal Employee
 - C. Under the Roles section, check the ForHealth Project Editor or Project Approver box, as appropriate (most users will be Project Editors, except for USFS users who are authorized to grant funds and approve projects; see Table below for more details).
- 5. Agree to the Rules of Behavior by left-clicking on the Rules of Behavior hyperlink near the bottom, reading the rules, and if in agreement clicking *I Agree*.

6. Click *Register* to request your account, and await account approval. A ForMAP National Administrator must approve account requests from USFS and other federal agency users, and ForMAP State Administrators must approve account requests from State Forestry Organization users. An email will be sent to the Administrators notifying them of the account request, and an email will be sent to you once the Administrator has approved or rejected your request.

Table 1. ForHealth functions by User Role and organization affiliation

ForHealth Function	Project Editor (from State Forestry organization)	Project Editor (from USFS or Other Federal organization)	Project Approver (USFS only)
Search for Projects	√ *	√ *	✓
Download Projects data	√ *	√ *	✓
Create/Submit Project	√ (See Program Direction)	✓	✓
Add Funding to Project			✓
Approve Project			✓
Reject Project			✓
Add/Edit Accomplishments		✓	✓
Upload Treatment polygons	√ (See Program Direction)	✓	✓
Update Integrated Acres			✓

^{*} Users who are affiliated with an organization other than the USFS will only be able to search for and download data for Projects from within their own organization

Basic Navigation

Once your ForMAP account is approved with a ForHealth role assigned, you will go to the ForMAP site (https://apps.fs.usda.gov/formap) and enter your eAuthentication credentials once again. This time, you will land on the ForMAP Home page from which you can access all ForMAP modules you have authority to access (if you only have a ForHealth role, this will be the only option presented).



Once you click the ForHealth button, you will land on the ForHealth Module Homepage. If you are a Project Editor, you will see two options presented.



If you are a Project Approver, you will see three options.



To return to the ForMAP Homepage at any time, click the ForMAP link in the top right of the header.



To return to the Project Editor Homepage at any time, click the ForHealth link in the Header.



High-Level Workflow

The basic workflow for adding, approving and reporting accomplishments for ForHealth Projects is as follows:

- 1. Project Editor or Project Approver¹ creates a new Project:
 - → Fills in key details, including Fiscal Year, Project Type, Project Description narrative, etc.
 - → Adds Disturbances, in the form of Agents and Hosts
 - → Adds proposed Treatments and Activities, acres and estimated costs
 - → Reviews entries and Submits for USFS review and approval consideration
- 2. USFS Project Approver *searches* for "Proposed" Projects
 - → Can bookmark any search for easy access when needed; easily links to Project Summary page
- 3. USFS Project Approver reviews Proposed Project
 - → Can make *edits*, if needed
 - → Adds Funding sources and amounts, if Project is to be approved
 - → Approves or Rejects Project
- 4. Project Editor *searches* for their "Approved" Projects
 - → Can bookmark any search for easy access when needed; easily links to Project Summary page
- 5. As work is accomplished and completed, Project Editor updates Accomplishments & maps Treatments
 - → Updates Accomplishments with Actual Acres and Actual (\$) Spent²
 - → Maps actual Treatment area³ for each Treatment funded by the Project

¹ USFS users will need to create Projects on behalf of all Cooperative Forestry Grantees for whom access to ForMAP is **not supported or not expected** as of version 5. See *Create a new ForHealth Project* for more details.

² If Project is Cooperative, Accomplishment 'actuals' are auto-filled when the Project is approved by the USFS, and is based on the Funding acres and dollars entered by the Approver. Only USFS can change these values for a Cooperative project.

³ USFS users will need to upload mapped Treatment areas on behalf of all Cooperative Forestry Grantees for whom access to ForMAP is **not supported or not expected** as of version 5. See *Add Mapped Treatment Areas* for more details.

Create a new ForHealth Project

Any user with a ForHealth role may create a new Project, however, not all Grantees will create Projects in ForHealth.

Cooperative Forestry Grantees who are affiliated with a State Forestry Agency may create an account to get a ForHealth role but for Fiscal year 2018, the USFS Regional Contact will create Projects for State Forestry Agencies on their behalf (please see Program Guidance for more information). State Forestry Agency users who have a ForHealth role may optionally log into ForHealth and use the Search functions to view their organization's Projects.

Cooperative Forestry Grantees who are NOT affiliated with a State Forestry Agency (e.g. State Agricultural Agency employees, University employees, etc.) cannot create ForMap accounts with a ForHealth role, and therefore cannot access ForHealth to create Projects. The USFS Regional Contact will create Projects for these Grantees on their behalf.

Any USFS employee or Other Federal employee may register for a ForHealth role for the purposes of proposing and reporting on funded Forest Health Projects.

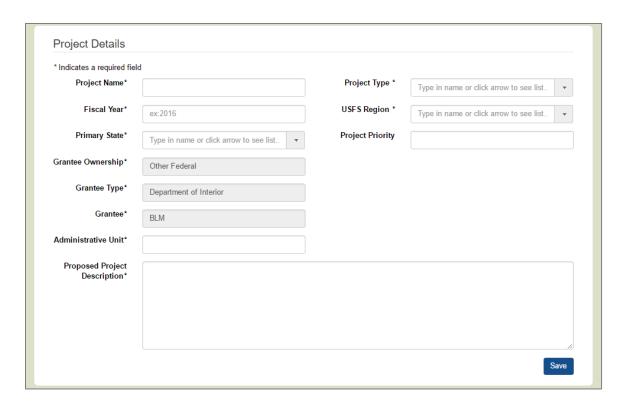
To ensure all Cooperative Forestry projects are included in ForHealth, **USFS** Project Editors and Project Approvers will create new Projects on a Grantee's behalf, and **must add Projects for all Cooperative Forestry Grantees**. State Forestry Agencies should not create new Projects in ForHealth unless Program Direction instructs them to do so.

Steps for creating a ForHealth Project:

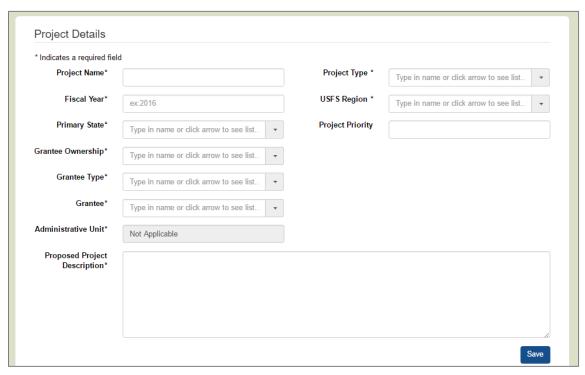
1. From the ForHealth Home Page, click on the Create New Project button.



- 2. Fill in the Project Details on the Create New Project page. Fields with the asterisks are required.
 - If you are affiliated with an <u>"Other" Federal</u> Agency as your Organization, your Grantee Ownership, Grantee Type, Grantee (name) fields are all pre-filled with the appropriate values. Enter in values for all other required fields. Click Save when entries are complete.

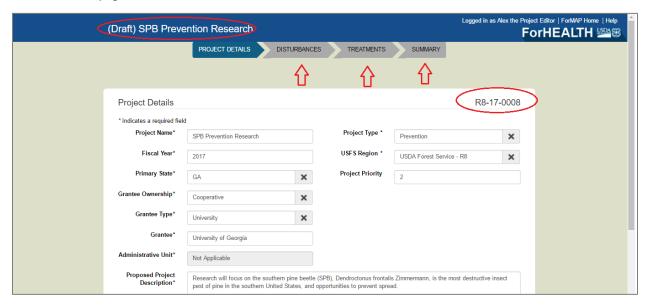


If you are affiliated with <u>USFS</u> as your Organization, you will need to enter in details for all fields, since you can create a Project for any type of Grantee. Click Save when entries are complete.



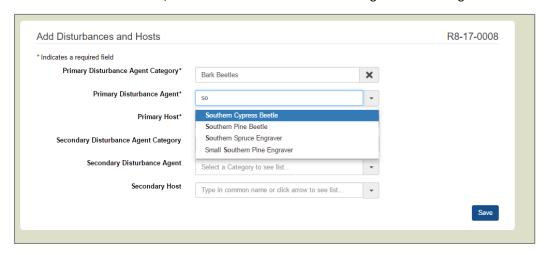
3. Once the Project Details have been saved, the page will update with the project title in the upper-left corner of the page prefixed with the Project Status (shown below as "Draft"). The automatically generated Project ID displays above the Project Type, and reflects the USFS Region ID, the Fiscal Year and

a sequential counter. Navigation tabs indicate that you are on the Project Details page, and that three other pages are available for navigation. The typical workflow is left to right, although any of the tabs may be worked on at any time during this phase of project creation. When finished editing the Project Details page, click on the Disturbances tab.

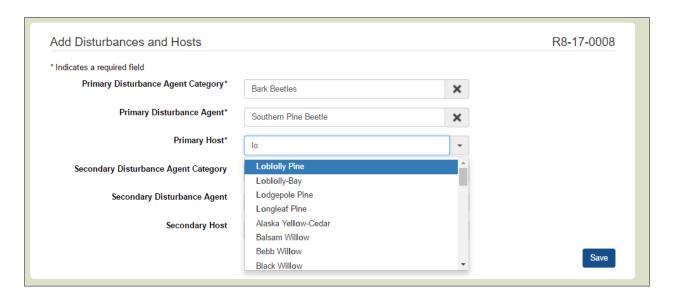


4. From the Disturbances page, add Disturbance Agents and Hosts to be addressed as part of the project. A primary agent and host set is required; a secondary agent & host set is optional.

In the Disturbance Agent Category field, type in the category to filter the list, or click on the arrow to see the values in the drop-down list. Pick a Category. Next, in the Disturbance Agent field, type in a few letters to see the filtered list, or click on the arrow to see a list of agents. Pick an Agent.



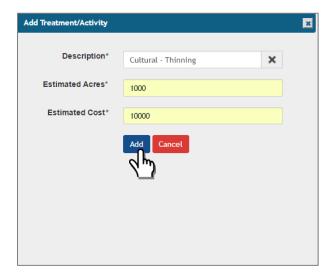
In the Host field, type in a common name or click the arrow to see a list. After selecting the appropriate agent & host set(s), click on the blue Save button.



5. Select the Treatments tab and click on the blue Add button to add a proposed treatment or activity to the Project.



A pop-up window will appear; pick a value from the Description list, and enter Estimated Acres and Estimated Cost into the respective fields. Estimated Acres is only required for treatments. Click on the Add button.

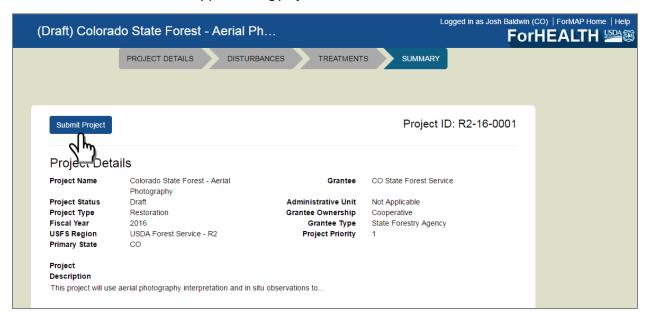


The Treatments page will display a table of the treatment or activity you added. Click the Add button from the Treatments page again to add any additional Activities or Treatments to the Project. Once

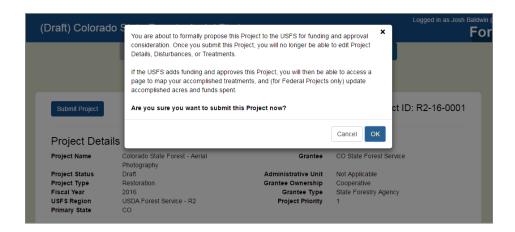
complete, the Treatments page will display all of the treatments and activities associated with the project, their associated acres and costs. You may delete existing ones as needed.



6. Click on the Summary tab. This Summary page displays all the information added to the project thus far and can be accessed at any point during project creation.



Once all of the project details, disturbances and treatments have been added to the project, it is ready to be submitted to a Project Approver for approval. Click on the Submit Project button and agree to submit the project.



After submitting the project, its Status will update from "Draft" to "Proposed". If the Grantee has access to ForHealth, they can continue to view the Summary Page for this Project, but can no longer make edits to it. Further edits will only be allowed to be made by USFS users (see *Edit, Fund and Approve a ForHealth Project*).

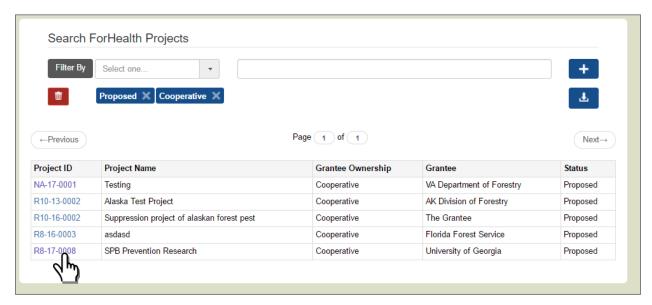


Edit, Fund and Approve a ForHealth Project

Once a Project has been Proposed (submitted by a user), a USFS Approver must log into ForHealth to review and consider it for funding and approval. Note that there is <u>no</u> automated email generated by ForHealth for Approvers to respond to; therefore, the Approver will need to look up the Proposed Projects to be reviewed using the Search tools in ForHealth (see *Search and Download ForHealth Projects*).

Any Project that is to be approved will require Funding details be entered prior to approval.

1. As a USFS Project Approver you will perform a search, and click on the Project ID link for the Project to be reviewed.

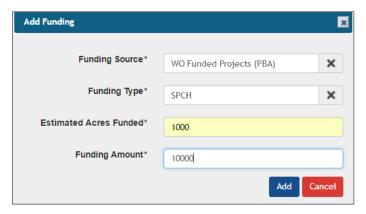


- 2. Review all submitted details from the proposed Project's Summary page, and if edits to existing details are needed, navigate to the appropriate pages (Project Details, Disturbances, Treatments). (Note that a USFS Project Editor may also edit entries on those pages.)
- 3. As a USFS Project Approver, click on the Funding tab go to the Funding page. (This step is only required and should only be done if the Project will be Approved.) The Proposed Treatment acres and project costs are displayed for reference.

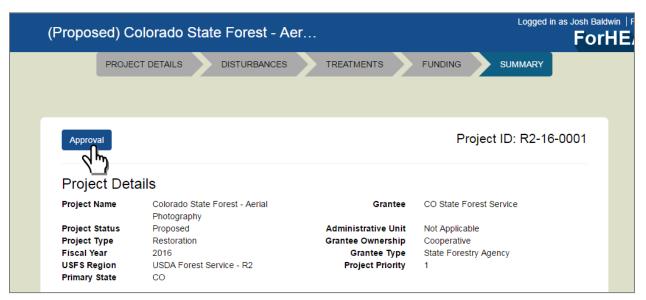


4. Click the Add button to add a funding entry to the Project.

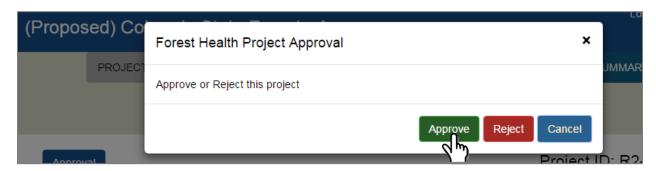
5. A window will display prompting you to pick the Funding Source, Type, Acres and Funding Amount. Click Add when finished. A Project may be funded from more than one Funding Source/Type, if needed; click the Add button from the Funding page if additional entries are appropriate.



6. After all project details are finalized, return to the Summary page and click on the Approval button.



7. Click the Approve (or Reject) button, as appropriate for the project. Note that <u>no</u> automated email is sent upon approval or rejection, and direct communication with the Grantee outside of ForHealth is recommended.



8.	Once approved, the Project Details, Disturbances, Treatments and Funding pages will no longer be
	editable by any user. A Project Approver may click the Approval button again to revert the Project to
	"Proposed" status if errors on those pages need to be fixed.

Update Project Accomplishments

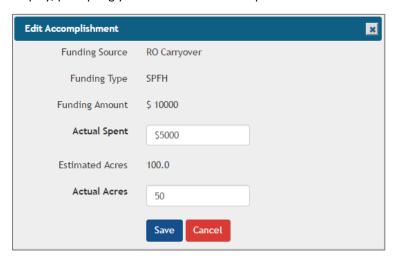
Project Accomplishments are reported in the form of "Actual Acres" and "Actual Spent" (in dollars) per Project.

IMPORTANT: For all Cooperative Forestry projects, the values for Actual Acres and Actual Spent are automatically filled in based on the Funded acres and Funded amounts. Only USFS users may edit these values for the Cooperative Forestry projects. All Projects that are USFS or Other Federal should be <u>updated annually</u> to reflect progress on Acres and Funding Spent to date.

- 1. If you've used your browser to bookmark the Summary page for the Project to be updated, go to that bookmarked page. Otherwise, use the *Search* tools to find Approved Projects to be updated with Actuals accomplished and access the Project's Summary page from the Search results.
- 2. As a USFS or Other Federal User, click on the Accomplishments tab. Click on the hyperlinked Actual Acres or Actual Spent (per Funding Source, if there are multiple) to enter actuals.



3. A window will display, prompting you to enter acres and expenditures. Click Save when finished.



4. The updated values will display in the Accomplishments table.

					D0 47 0000
Accomplished A	Acres & Actual F	xpenditures			R8-17-0009
Accomplished A	Acres & Actual E	xpenditures			R8-17-0009
Accomplished A	Acres & Actual E	xpenditures			R8-17-0009
Accomplished A	Acres & Actual E	xpenditures Est. Acres	Actual Acres	Funded Amount	Actual Spen
·		•	Actual Acres	Funded Amount \$10,000	

Add Mapped Treatment Areas

Accomplished Treatments will be mapped by the Grantee, even if a USFS user is entering the data into ForHealth on their behalf. All Treatments must be mapped as polygons (areas) in Shapefile (or other valid ESRI vector polygon) format⁴. If a USFS user is entering data into ForHealth on your behalf, you must provide them with a Shapefile once the Treatment has been implemented (see Program Direction below).

Program Direction (as of Aug 21, 2017)

Users are encouraged to obtain spatial data on projects and include them in the ForHealth project record. The scale for the spatial data will vary widely across the variety of projects included in the ForHealth application. Note that reported acreage values for accomplishment reporting will continue to come from the tabular entries in the project record and not from the spatial component. The spatial component is intended to show the location and overall extent of the projects on the landscape.

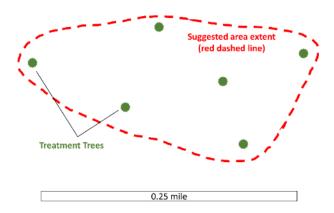
Specific guidelines:

- Scale This will vary depending on the project. Large projects such as aerial application will encompass significant areas, while smaller individual tree-based projects might be just a few acres.
- Number of features The application requires users to enter each feature individually or dissolve the
 features to create a multipart feature which can be loaded as a single entry. It is highly recommended that
 users create multipart features for projects with more than a few individual areas (>10) to facilitate the
 operation.
- Project extent/area Depending on the feasibility of the project area and the activity type, the spatial data should represent the treatment as close as possible. Here are a few suggested guidelines:
 - Stand levels Projects that have clearly defined stand-level boundaries should have those boundaries entered into the application.
 - Aerial application Spray block boundaries can be entered directly to show the project area.
 - o Individual tree based projects Currently the ForHealth application only allows polygon (area) entries, and not points. If individual tree(s) or point(s) are the treatment, the individual point locations should be buffered to produce an area. Alternatively, a small polygon encompassing the locations could be created. No specific buffer guidelines are provided at this time and the local unit can best decide the size of appropriate buffer areas. If individual locations are buffered, the buffer would ideally reflect the size of the activity or treatment.

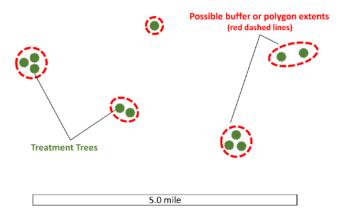
Examples include:

⁴ A valid .prj file must be included. The ShapeUp tools and ForHealth support multi-part polygons. For a multi-part shapefile to be uploaded as a single treatment area, the records will have to be merged into a single record before upload. If additional assistance is needed, please contact the ForMAP Help desk: 800-908-7550 or support@formap.kayako.com.

1.



2.



Adding Mapped Treatment Areas

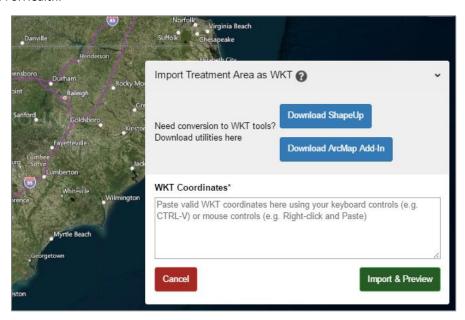
To update the Project with the Treatment shape, please follow these steps:

For the Project in question, click on the Map tab to get to the Map page.

- 1. Map tools include:
 - A. Search box (on left)
 - B. Zoom tools (on left)
 - C. Zoom to previous extent (on left)
 - D. Imagery information (on right)
 - E. Map overlays (on right)

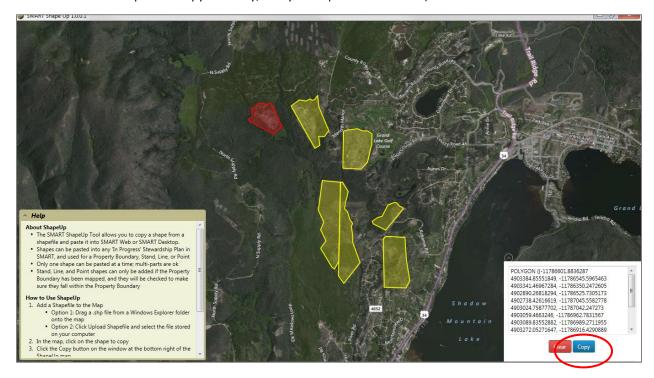


2. Click on the Import New Area button on the bottom right of the screen. A window opens with options to download import tools and to paste in WKT coordinates (if you have already used the import tool). NOTE: If you have never imported a shape into ForHealth or other ForMAP module (like SMART or LaSR), you will need to download one of the ShapeUp uploader tools to convert your Shapefile to "WKT Coordinates" for use in ForHealth.

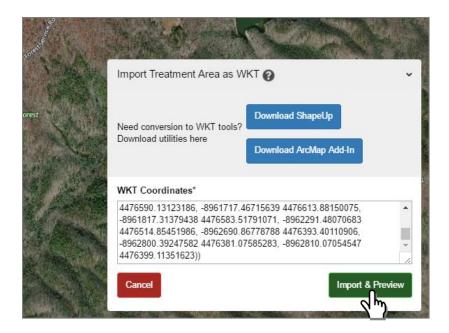


- 3. If you do <u>not</u> use ESRI ArcGIS software or prefer not to use the ArcMap Add-In, click the 'Download ShapeUp' button to download the standalone utility. (See Step 4 if you do use ArcMap)
 - A. Once downloaded, unzip the folder from your computer and double-click the "SMARTShapeUp.exe" file to launch the utility. (If you do not have Administrative privileges for your computer, you may need to right-click on the .exe and open it with the Run Elevated

- command. If additional assistance is needed, please contact the ForMAP Help desk: 800-908-7550 or *support@formap.kayako.com*.)
- B. Once the ShapeUp utility window is open, there will be an information box in the lower left hand corner that provides guidance. NOTE that the text refers to other ForMAP Modules, but Steps 1-3 are applicable to ForHealth.
- C. Click on the Upload Shapefile button, then navigate to the Shapefile on your computer that contains the Treatment area(s).
- D. In the map, click on the treatment area to import (it will turn red).
- E. Click the Copy button in the coordinates window. (The coordinates are now stored in your computer's 'copy' memory, ready to be pasted in ForMAP)



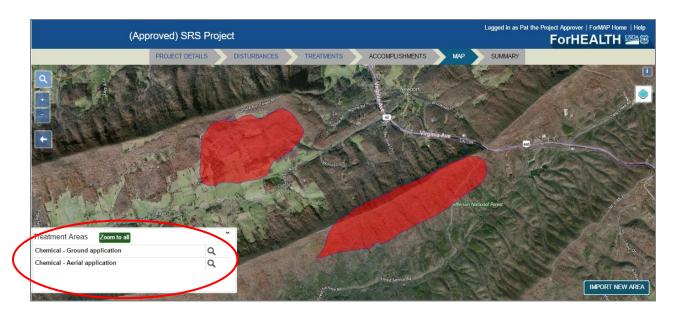
- F. Return to the Map page in ForHealth for the Project in question and if the Import Area window is no longer open, click the Import Area button to open it.
- G. Paste the copied WKT Coordinates (ctlr-V or right-click/paste) into the WKT Coordinates box.



- H. Click the green Import & Preview button.
- I. You will need to pick a treatment type for the area (it does not need to match what was proposed in the Project). Click the green Save Treatment Area button.



J. After the Treatment area has been added to the Project, it will display on the map and a list of all mapped treatments will display at the lower left part of the screen. You can add more Treatment areas as needed. Use the zoom controls in that window to zoom the map to all Treatments on the Project, or to a single Treatment.



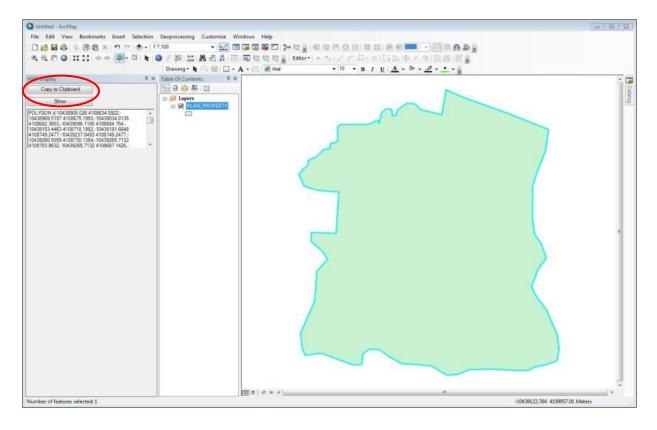
K. Click on a Treatment area in the map; it will change color. A window at the bottom right displays the calculated Treatment acres, and allows you to update the Treatment type or delete the Treatment area.



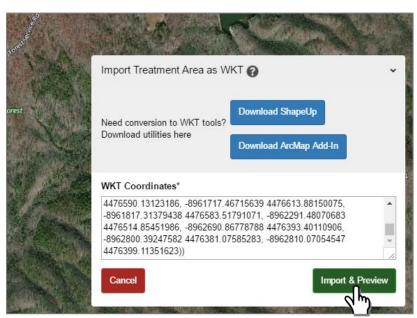
- 4. If you have ESRI ArcGIS software, you may alternatively download the ArcMap Add-In. Click on the 'Download ArcMap Add-In' button to download the file. A Help Document is provided in the ShapeUp download folder, which provides guidance on the process of installing and using the tool. If additional assistance is needed, please contact the ForMAP Help Desk: 800-908-7550 or support@formap.kayako.com.
 - A. In ArcMap, click the Selected Geometry to WKT icon on the ArcMap toolbar (see icon below, as highlighted by red arrow).



- B. With the ArcMap selection tool, select the polygon of interest. The shape coordinates will show up in the WKT Display window.
- C. Click on the Copy to Clipboard button (red oval, image below).



- D. Return to the Map page in ForHealth for the Project in question; if the Import Area window is no longer open, click the Import Area button to open it.
- E. Paste the copied WKT Coordinates (ctlr-V or right-click/paste) into the WKT Coordinates box.

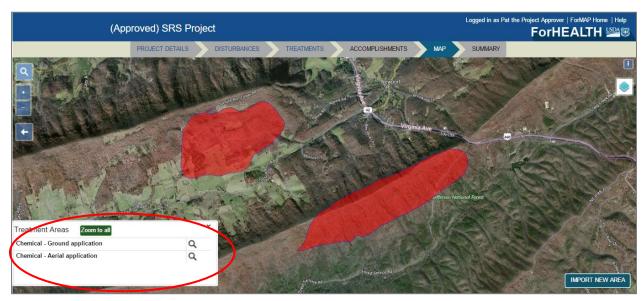


F. Click the green Import & Preview button.

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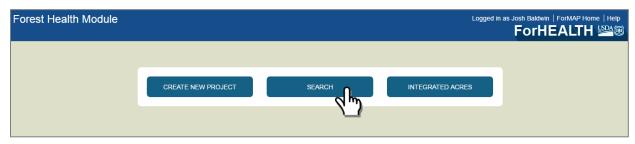
I. Click on a Treatment area in the map; it will change color. A window at the bottom right displays the calculated Treatment acres, and allows you to update the Treatment type or delete the Treatment area.



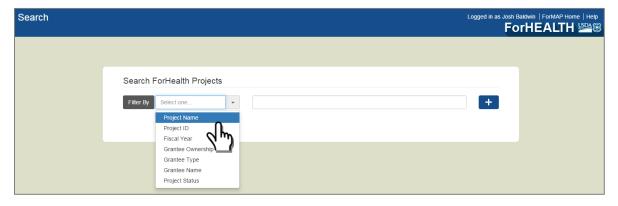
Search and Download ForHealth Projects

To find an existing Project in ForHealth, use the Search tool available from the ForHealth Home Page. Projects may be searched for using the following Filter options:

- Project Name (full or partial name)
- Project ID⁵ (full or partial ID)
- Fiscal Year (federal)
- Grantee Ownership (Cooperative, USFS, Other Federal)
- Grantee Type (Local Government, State Forestry Agency, State Agricultural Agency, Other State
 Agency, Tribe, University, Other Cooperative, Department of Interior, Other Department (federal),
 National Forest, Research Station)
- Grantee Name (full or partial name)
- Project Status (Draft, Proposed, Approved, Rejected)
- 1. From the ForHealth Home page, click on the Search button. (To get to the Home page click the ForHealth link in the page header)



2. Select a filter type. Either type in text (for Project Name, Project ID, Fiscal Year, Grantee Name) to find a match, or pick a value from the drop-down lists presented (for Grantee Ownership, Grantee Type, and Project Status). Click the Plus button to add a filter to the query.

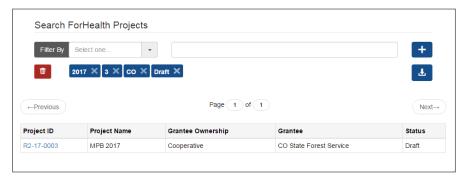


You may add multiple filters to the query to refine your search, as shown below. Filter terms can be deleted separately by clicking on the "X" inside its button, or all at once by clicking on the red trash can. Search results will automatically update as filters are applied or removed, and are shown in a table below the filter inputs.

HINT: You can use your browser to bookmark a search results page with often used search parameters, and when visiting that bookmarked page in the future, it will pre-load the search results. For example, if you want to

⁵ To search by USFS region, use Project ID and enter region – e.g. R2.

frequently see Proposed Projects in Region 2, add filters to a search with Project ID = R2 and Project Status = Approved, and then bookmark the page.



3. Click on the blue Project ID link to access the individual Project, located in the left most column of the search results table.

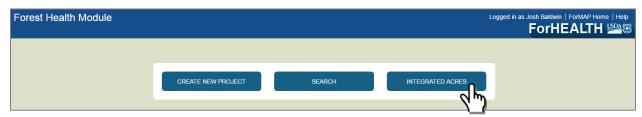


4. If desired, export the search results as an excel spreadsheet with the blue Download button located under the add filter (plus) button. The excel workbook will contain two sheets: Forest Health Projects and Treatments and Activities.

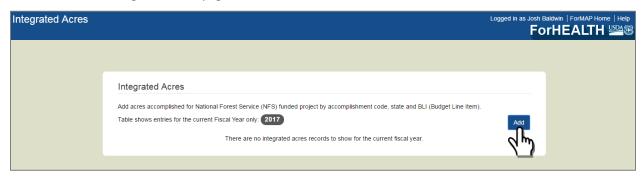
Add Integrated Acres

Only Project Approvers may add Integrated Acres into ForHealth, to report on National Forest System funded projects.

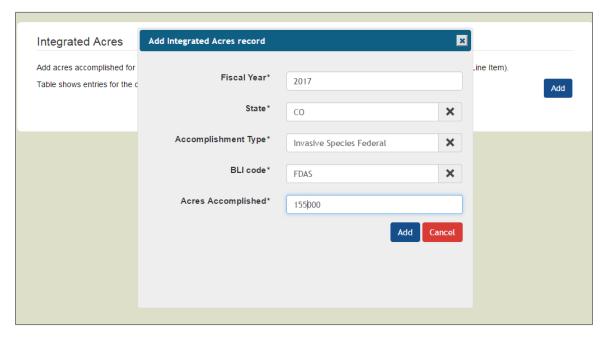
1. From the ForHealth homepage, a USFS Project Approver clicks on the Integrated Acres button.



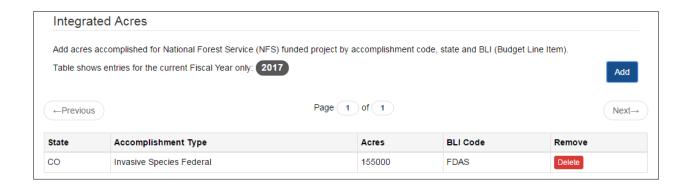
2. From the Integrated Acres page, click on the Add button.



3. A window appears prompting entry of Fiscal year, State, Accomplishment Type, BLI code and Acres. Note that you can add accomplishments for Fiscal Years other than the current one, but only the current Fiscal Year will be displayed in the table.



4. Integrated acres accomplishments will show up in a list. Records can be added and deleted as needed.



Project Data from FAD

Forest Health Projects from the Forest Health Protection Accomplishments Database (FAD) will be migrated into the ForHealth database to the every extent possible. Because of differences between data structures and data requirements, some Projects will not be migrated.

A reference on data migration will be available on the **www.formap.info** User Guides and Materials page once available.