This user manual is a living document that will undergo revisions as the application and other processes and regulations change. Please check with CVFPB Staff to ensure you have the latest version.
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Select the CVFPB tab located on the top menu bar and then select USACE Periodic Inspection Data. This will take you to the Data Screen.
I. Getting to know the PI Selection Page

Upon accessing the USACE Periodic Inspection (PI) Data you will be taken to the PI Selection Page where you can search for and update inspection records related to the PI Report for your LMA. We will be using DWR’s Sacramento Maintenance Yard (MA 0009) in this example.
Ia. Selecting records by LMA

- Use the pull down menu to select inspections data by **LMA** *(1).*  
  *Only applies to users who have multiple LMAs.*
- Once you select the LMA, all records for that LMA will be populated in the Records Table. Selecting the **Unit** *(2)* will further narrow down your selection.
- By default, the Records Table will sort the records by ID, but you can sort them by clicking on any of the available column labels *(3).*
Ib. Selecting records by date of entry

- To select records by when they were entered, use the Calendar buttons to select the Start Date (1) and End Date (2).
- Once you have the Start and End Dates selected, click the Query Data to retrieve the information. A new set of record will be populated.
Ic. Selecting records by USACE Periodic Inspection ID

- Once you have an LMA selected you may choose to populate a specific record by entering the full or partial USACE Inspection ID in the appropriate field (1). Clicking the Search button (2) will return records in the Records Table matching your search query.
  
  Note: In this example, the number ‘0027’ returned back three records matching the exact criteria. But if you were to search for ‘27,’ then it will return more than three records containing the characters. You can fine tune your search criteria to narrow down your results.

- Click the Reload Data (3) button will restore all records for the LMA.
II. Reviewing and editing records

- Now that you have selected your records, you are now ready to review and edit the record.
- With the Records Table populated, click on a record anywhere along the row associated with it (1).
  
  **Note:** Once selected, a check icon will appear in the check box on the first column.

- To select multiple entries, you can either click-hold and drag your mouse, or select them individually one at a time.
- Click on the row again to deselect it. You will notice the check icon disappear. Alternatively, you can click on Clear Selection (2) to deselect it.
- To select all entries, click **Select All** (3)

![Image of Records Table](image-url)
IIIa. Reviewing and editing Non-Encroachment records

- **Non-Encroachment** records are inspection items other than encroachments. These could be Unwanted Vegetation Growth, Slope Stability, Riprap Revetments & Bank Protection, Animal Control, Cracking, Depressions / Rutting, etc. You can determine what type of item a record is by looking at the **Item** column (1).

- Select any Non-Encroachment record and click the **Update Issue** button (2). In this example, we have selected record ID 17005.

  *Note: At this point, a new window will open labeled Editing Periodic Inspection No. XXX. See next section.*

![Image showing the updated issue window](image-url)
IIIb. Editing Non-Encroachment records

- In this editing window you will be able to edit the record and upload photos. The fields in the green box contain USACE information, and are locked for editing.
- Use the Corrective Action Plan (1) field for comments related to the repair of the item or how it is being addressed.
- Use the Comments (2) field for any other comments you may have.
- Use the Select a Status (3) drop down menu and choose the status that best describes the progress being made in resolving the item.
- Enter your or the field inspector’s name in the Inspector First Name (4) and Inspector Last Name (5).
- To Attach / Edit Photos (6), refer to the next section.
- When you have all the information entered, click the Update (7) button to save. A window will pop up confirming all the information was saved. Click the OK button to exit out of the window and back to the PI Selection Page.
- At any time during this process, you may click the Dismiss (8) button located on the bottom left or Abort (9) button located on top right to exit out of the window and discard all the information you just entered. Note this action will not save your work.

(refer to next page for illustration)
IIIb. Editing Non-Encroachment records (Illustration)

(1) USACE Inspection ID: USACE_CESPK_MASA_2009_a_0011
(2) Rating: UY
(3) LMA Name: Maintenance Area 0009
(4) Unit Name: Unit No. 01 Sacramento River
(5) LMA Response: Low Priority on 06/07/2014
(6) Status: Monitor
(7) Category: USACE Levee Embankments
(8) Levee Mile Start: 0.01
(9) Item: Unwanted Vegetation Growth
(10) Levee Mile End: 2
(11) Inspection Action: NA
(12) USACE Remarks: Heavy brush (up to 5 ft. high) and trees up to 24 inches completely obstructing levee inspection
(13) Corrective Action Plan: Not currently being addressed due to priority level.
(14) Comments:
(15) Select a Status:
(16) Low Priority
(17) Inspector First Name
(18) Inspector Last Name
(19) Update
(20) Attach/Edit Photos
(21) Dismiss
IIIc. Adding and editing photos and documents to Non-Encroachment and Encroachment records

To begin the process, click the **Attach/Edit Photos** button and a new window will display. You may have to refer to Section IIb of this manual on how to access the aforementioned button.

Navigate to the folder that contains the photos you want to upload. A maximum of five photos can be uploaded (**6a**). Click the **Open (6b)** button when you are finished selecting. This action will trigger a new window to open.

- In this new window you can enter your comments for each photo (**6c**).
- Click the **Accept (6d)** button when you are done with your edits. This will close out the window and take you back to the editing window.
- At any point during the process, you can click the **Abandon Selected Images (6e)** button to discard all the photos you entered. This action will not save any of your recent work.
IV. Reviewing and editing Encroachment records

- **Encroachment** records are inspection items labeled as encroachments in the Item column.
- Once you select an encroachment record from the Records Table and click **Update Issue**, a new window labeled Encroachment Referral Issue. See below. In this section we will go over the four tabs labeled General Information, Details, Contacts, and Status/Comments.
IVa. Encroachment records – General Information tab

- The General Information tab contains generic information entered by the USACE. It also contains real estate information such as the property address and the Assessor’s Parcel Number.
- You can edit the fields below marked with (*).
- Note that none of the other tabs will be accessible until sufficient information has been entered and saved in this tab.
- When you have entered all the information, click Save/Continue (1) button to unlock the other tabs.
IVb. Encroachment records – Details tab

- The Details tab includes additional information entered by USACE. In this tab you will be able to enter more specific information.
- Select a Status (1) indicates the progress made in addressing the item.
- Encroachment Type (2) specifies what type of encroachment needs to be addressed.
- Levee Part (3) and Levee Side (4) identify the location of the encroachment relative to the levee section.
- Select which bank (Left Bank or Right Bank) (5) the encroachment is located on.
- Enter the River Mile (6) the encroachment is located on. This information can be obtained by using DWR’s FERIX website at http://ferix.water.ca.gov/webapp/LeveeMile/ and using the given Latitude and Longitude.
- The Associated Permits (7) field allows you to enter permit numbers potentially related to the encroachment.
- The Document in (8) subsection allows you to make comments regarding O&M, As Builts, and Levee Log information related to the encroachment.
- The Legal Authority (9) subsection includes many of the standard Title 23 languages included in the Notice of Violation. Click the Legal Authority Description (10) button to open a pdf file that includes a brief explanation of what each code means. Then select which one is applicable to the item by selecting the box next to the label.
- Instructions for Attaching and Viewing photos and Docs can be found in Section IIIc of this manual.
- Click Save Detail (11) when you are done.

(refer to next page for illustration)
IVb. Encroachment records – Details tab (Illustration)

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Project Name</td>
</tr>
<tr>
<td>2</td>
<td>Encroachment Type</td>
</tr>
<tr>
<td>3</td>
<td>Levee Part</td>
</tr>
<tr>
<td>4</td>
<td>Levee Side</td>
</tr>
<tr>
<td>5</td>
<td>Left Bank, Right Bank</td>
</tr>
<tr>
<td>6</td>
<td>Latitude Start, Longitude Start, River Mile Start, Length (ft)</td>
</tr>
<tr>
<td>7</td>
<td>Levee Remarks, USACE Inspection Action, CVFPB Comment</td>
</tr>
<tr>
<td>8</td>
<td>Documented in (O&amp;B, As Built, Levee Log)</td>
</tr>
<tr>
<td>9</td>
<td>Legal Authority Description</td>
</tr>
<tr>
<td>10</td>
<td>Legal Authority (CWC Section 8700 - Interference with SPPC, CWC Section 8710 - CVFPB Construction approval, CWC Section 8712 - Altered Levee without approval, CCR Title 23, Section 6 - Permit Required)</td>
</tr>
</tbody>
</table>

* Comments made by CVFPB staff

Refer to Section IIIc of the manual for instructions
IVc. Encroachment records – Contacts tab

- The **Contacts** tab allows you to enter contact information of individuals, agencies, and companies involved in the issue.
- Enter all the appropriate information in the available fields. Select **Update Contact (1)** when you are done. You will notice the information show up as a new row in the table below.
- To edit the contact information, simply click on that contact (2) and the fields will be repopulated. Click **Update Contact** once you are done with your edits.
- To add a new contact, click the **New Entry (3)** button and follow the above steps.
IVd. Encroachment records – Status/Comments Tab

- The Status/Comments Tab allows you to document activities like site visit, telephone conversation, email correspondence, and meetings that relate to the issue.
- To enter a new activity, Select from the **Status/Activity (1)** drop down menu.
- Enter any additional comments in the **Comments (2)** box.
- Click the **Create Status (3)** button. The activity will show up as a new row in the Status/Comments table (4).
- To enter a new entry, click the **New Entry (5)** button and follow the above procedure. If you are done, hit the **Dismiss (6)** button to exit out of the window and return to the PI Selection Page.
V. Creating Summary Reports and CSV Files

- To create a summary report, you must be in the PI Selection Page. After you have selected a record, click **Create Summary (1)**. A new window will open, where you will be able to preview the summary report and print it. Note that you can create a single summary report from multiple records. Simply select all or specific records you want to print prior to clicking **Create Summary**. A sample summary report is shown on the bottom left of this page.

- To create a Comma Separated Value (CSV) file that can be readable in Microsoft Excel, select the record(s) you wish to import, and click **Create CSV (2)**. A window will open asking you for a location to save the file.