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Transmitted via email

April 27, 2004

MINNESOTA BULLETIN 300-4-27

SUBJECT: LTP – Customer Service Toolkit

Purpose. To reaffirm to all employees the mandated use of Customer Service Toolkit.

Expiration Date. September 30, 2004

Background. The Customer Service Toolkit has been the official conservation planning software of the Natural Resources Conservation Service (NRCS) since October 1, 2003. We are continuing to improve this application and the corresponding business process associated with it. The new Customer Service Toolkit (Version 5.0), which will use ArcGIS technology, will be more user friendly than the current Toolkit (Version 4.1). It will allow information to be directly written to the National Toolkit database and “checked out” when needed. The target date for the full deployment of Toolkit Version 5.0 is October 1, 2004.

Field users are to continue to use Version 4.1 of the Toolkit until Version 5.0 is released. Version 4.1 is completely compatible with ProTracts. It should be understood that conservation plans developed in Toolkit serve as the foundation for contracts developed in ProTracts. This is consistent with the planning process and allows planning to proceed in the absence of financial assistance. It also gives conservation planners the opportunity to have potential contracts “on-the-shelf” that can be used as financial assistance is allocated.

To avoid overselling Toolkit 5.0 and to better define realistic expectations, please consider the following facts:

- The user will maintain the customer’s conservation plan and practice schedule as they did in Version 4.1.
- The user will either digitize land units in Toolkit, or geo-reference them later in the Performance Results System (PRS).
- The user will either link Conservation System Guides (CSGs) to land units in Toolkit, or later in PRS.
- The user will not have to enter data in PRS unless it was deferred in Toolkit, or they want to change the data PRS has mined.

The primary time savings benefit of Toolkit 5.0 will be: (1) two-way data exchange between it and ProTracts and (2) a much improved customer file management process (Check-In/Out). PRS will save time if Toolkit plan records are maintained. PRS benefits in that it gets conservation effects from CSGs linked to land units. These conservation effects will reflect the institutional knowledge of NRCS built up over time.

/s/

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