

Woodland Creation Planning Scheme

Woodland Plan Register (WPR)

Planner Guidance

The Welsh Government produces this Guide in Welsh and English as required under the Welsh Government Welsh Language Scheme. Should you require a copy of this guide in Welsh, you can access it from gov.wales/woodland-creation-plan-scheme by selecting the language switcher at the top of the page and re-opening the document.

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Introduction

The Woodland Plan Register (WPR) is a new central hub for the Woodland Creation Planning Scheme (WCPS), created to simplify the woodland planning process for all parties during the creation and verification process.

From selection onwards, the plan, shapefile and any accompanying documents will now be uploaded directly to the WPR. The shapefile mapping will now be validated online at the point of upload, with instant feedback provided as to the validity of the mapping.

All planning related documents will be stored in the WPR, allowing customers to monitor their woodland plan as it goes through each step of the process. It will also allow Planners, NRW and Welsh Government staff to work from the same platform, providing a more joined up service.

Once verified, the customer can use the plan to enter the Woodland Creation Grant (WCG) scheme. The plan will remain in the customers plan list as a permanent reference should it be needed in the years to come.

How does the Woodland Plan Register work?

Customer WCPS EOIs will be selected in the usual manner, but instead of having to return a signed portion of the selection letter, the customer or their agent will now accept selection via the new Woodland Plan Register (WPR) area on RPW Online. The customer or agent will also name the plan and choose to invite a woodland planner from the list of registered woodland planners, to become the planner for their EOI.

Once invited, a message will be sent to woodland planners via RPW Online giving the choice to accept or decline invite. If accepted the planner can then begin putting together the plan for the customer via the new WPR.

Note: Customers will be expected to engage their chosen planner via the normal channels in advance of selecting them as planner via the WPR.

Changes to the process of submitting a Plan for verification?

There are some changes, detailed below to streamline the plan submission process:

- Plan documents will no longer be submitted via the RPW Online messages area, you will
 now be uploading plan documents to a purpose built area where shapefile, plan and
 supporting documents are stored making it easy to manage, amend and replace when/where
 necessary.
- Shapefiles will be validated at the point of upload to check for errors, providing instant feedback should corrections be necessary.
- A shapefile, plan template or supporting document can be replaced/amended as many times
 as is necessary, up to the point of submission when submitted the Plan is locked as a
 snapshot. If changes are required during the verification process, the Plan will be re-opened
 for changes to be made by planner.
- The *Plan of Operations* table previously found in the Woodland Creation Plan template has now been removed. Instead, the *Plan of Operations* will be derived from the Shapefile Attribute Tables and geospatial data and displayed alongside an overview map of the shapefile in the WPR screen.
- All Tree Species have been allocated a short code to make completion of the woodlandArea attribute table a faster process. The list of Tree Species codes is available on the WCPS area of the Welsh Government website.
- The ability to map gates has now been added to the shapefile in the form of a new shape layer called *woodlandPoint*.
- As the WPR system will now derive areas and lengths geospatially when you upload a shapefile, each of the shape attribute tables has been simplified to now only require the minimum of information. All shape layers require a *UniqueID* and *Option Code*, and additionally:
 - o The woodlandArea shape will require tree species and percentage entry (up to 20).
 - The woodlandLinear shape will require addition of the UniqueID of the planting area it is linked to.
 - The woodlandPoint shape will require the addition of the UniqueID of the fencing it is linked to.
- An area to add surveys that may have been necessary during planning stage has been added to the WPR. These surveys will automatically appear in the *Plan Fee and Survey Claim* which will also now be completed via RPW Online.

Accessing the Woodland Plan Register (WPR)

There are two ways to access the Woodland Plan Register (WPR), depending on whether you wish to access as a woodland planner, or whether you are also acting as agent on behalf of a customer. It is important to note that if you are planner *and* agent for a customer, you will be able to access both the customer WPR area (via the customers account link in your RPW Online customer list) and your planner WPR area (via your Agent Home link), and it will be necessary to ensure you access the correct WPR area for the different functions mentioned below.

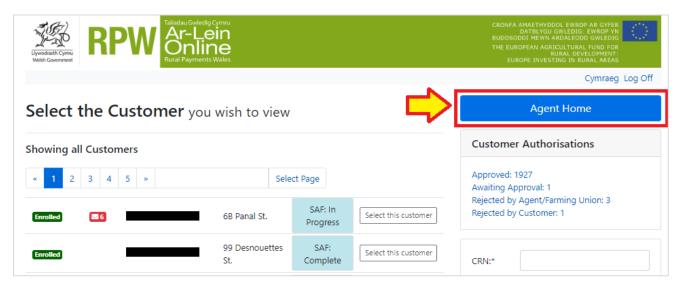
Accessing the WPR via a Customer Account (as an Agent)

A customer (or the customers agent) will access the WPR using the link in the customer RPW Online account home screen. A customer can only see a list of their own plans and can only do a limited number of things in the WPR – these include accepting selection, naming the plan, and inviting a Woodland Planner to complete their plan. Then the customer WPR screens become read-only mode and they can only view the plan.

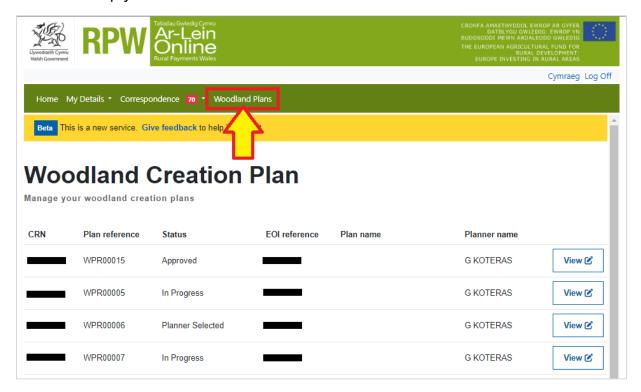
A separate guidance document specific for customers accessing and using the WPR is available on the Welsh Government website.

Accessing the WPR via a Woodland Planner Accredited Account

An accredited woodland planner must access the WPR through their **Agent Home** link in RPW Online.



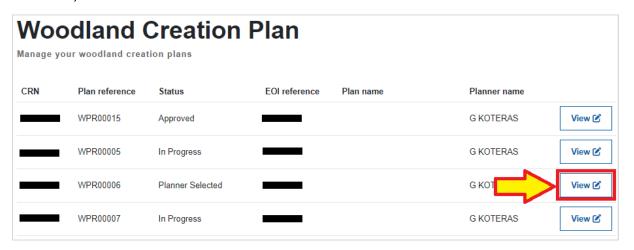
Once in your Agent Home screen, click the 'Woodland Plans' link in the menu bar. A list of plans will be shown. Note that a planner can only see a customers plan in their plan list if they have been *invited* to become planner for that plan. If you do not currently have any invites or active plans, this list will be empty.



Note: Each plan in the system will be allocated a new **Plan Reference** to make it easier to track progress through the verification process, this will take the format 'WPR00000'. You will also see the status of the plan (see Appendix A for more information on status), which will give you an ataglance update of where the plan is in the verification process.

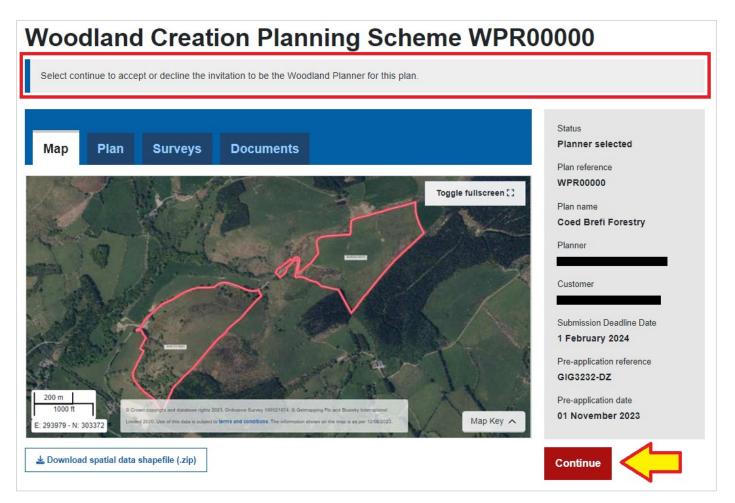
Accepting or Declining Invitation to become Woodland Planner for a Customer

If you have received an invite to become planner for a customer via your RPW Online Messages area, to accept or decline the invitation, within your Agent Home > Woodland Plans area, click the **View** button in your plan list (plans that you have been invited to will be in the status *Planner Selected*).



The Woodland Creation Plan Screen will now be shown for that customer. The default view will show a map of the land parcels selected on the WCPS EOI on the left side, with an information box on the right side showing details of the plan, including current status, EOI reference, Plan reference and plan name.

The four selectable tabs are *Map*, *Plan*, *Surveys* and *Documents*, however before you can do anything in these tabs you will need to accept invitation to become planner – as per the screen instruction, click the **Continue** button.

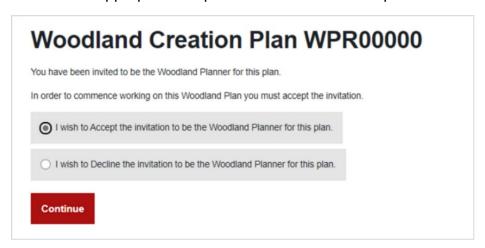


^{*} The Pre-application reference and Pre-application date fields will only be populated if the WCPS EOI was submitted from WCPS Window 3 onwards, when the requirement to add these details to the WCPS EOI was first introduced.

Note: You can if you wish download a copy of the Shapefile before accepting invitation to become planner by clicking **Download spatial data shapefile (.zip)**.

Accepting or Declining Invitation

Choose the appropriate response to the invitation request and click **Continue**

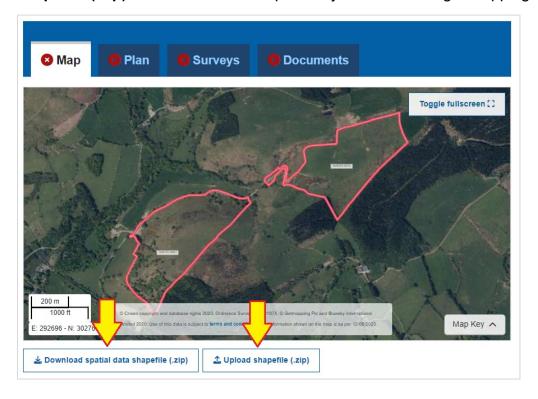


- If you accept the invitation you will now be able to begin the planning process detailed in the next sections of this document.
- If you decline the invitation, the plan will no longer be available in your Plan List, and the
 customer will be notified of your decision to decline invite. The customer will then be able to
 reselect a planner.

Completing a Plan

The Map Tab

This tab shows the customers selected parcels by default. Upon upload of a valid Shapefile, the shapefile mapping will be overlaid on this map providing a quick reference of each item mapped, alongside the Plan of Operations which will be shown below the map. Click **Download spatial data shapefile** (.zip) to download the shapefile – you can now begin mapping as required.

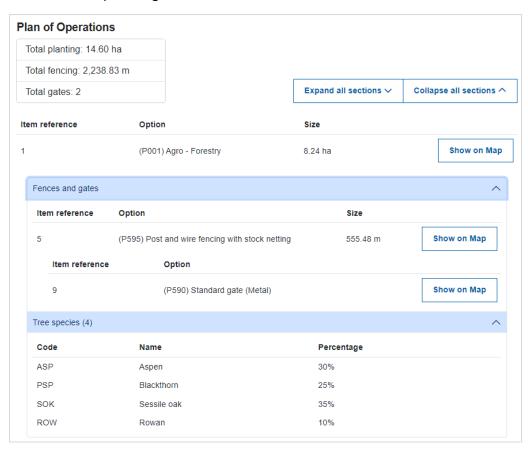


When shapefile mapping is complete, click **Upload shapefile (.zip)** to upload the completed shapefile.

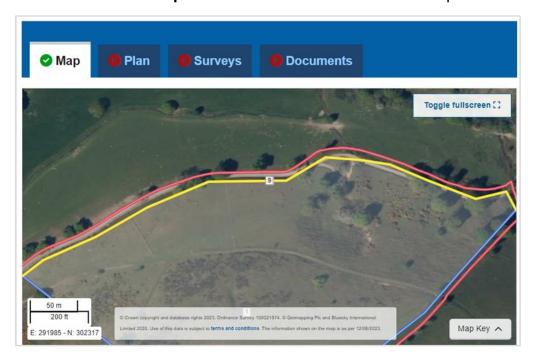


If valid, the shapefile mapped areas are overlaid in the WPR map and a green tick appears in the Map tab.

The **Plan of Operations** derived from your shapefile Attribute tables and geometry data is shown below the map, along with other useful information:



Each planting item displays the associated fencing and gates, as well as the tree species list. You can click **Show on Map** next to an item to zoom the main map to that item.



During upload of the shapefile you may see validation errors shown – these must be addressed before the upload of shapefile is accepted as valid. More information on how to troubleshoot shapefile errors can be found in the Shapefile Guidance document here: www.gov.wales/woodland-plan-register-shapefile-guidance.

Best practice for upload of Shapefiles

A Shapefile can be uploaded as many times as is necessary to get a *valid* shapefile uploaded for a Plan. You may wish to upload a shapefile at each step of the process of creating polygons/fences/gates so that you can get used to the system and any tolerances that apply.

This will be particularly useful if you have a large amount of mapping to be done, so if you were to upload the shapefile as each part of the shapefile is created, you will see any errors as you go along rather than completing a large shapefile first, then uploading, only to find a large amount of errors that could become complicated to resolve in your GI software.

Please ensure that the Shapefile and all other parts of the Plan are complete when you *submit* the Plan for verification – it's at this point that the Plan will become read-only, so again, until that point is reached you may add/delete and replace each part of the Plan as many times as you see fit.

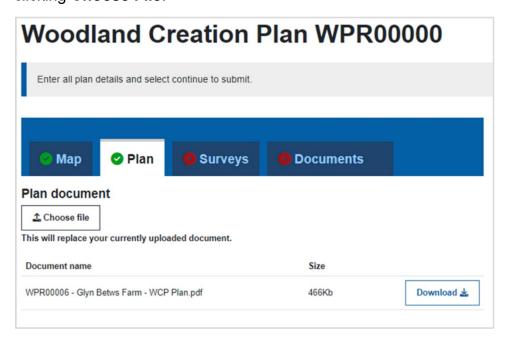
The Plan Tab

The plan tab will allow you to upload the completed Woodland Creation Plan template for the customer. This document can be uploaded in .doc, .docx or .pdf format.

Click Choose File to upload the Plan template document:



After upload, the plan template name and size will be shown on screen, and a green tick will appear on the Plan tab. The uploaded plan template can be downloaded at any time by clicking the **Download** button. The plan template can also be replaced if necessary with a new version by clicking **Choose File**.



Note: there can only be one plan template version at a time on the Plan tab. If you wish to upload a new plan template version, click **Choose file** to overwrite the existing plan template.

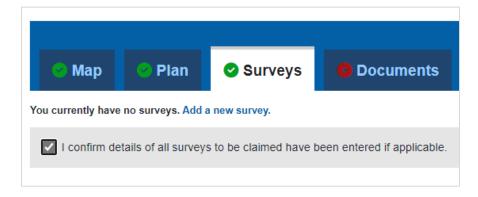
The Surveys Tab

The surveys tab will allow you to add details of any Specialist surveys that are required as part of developing the Plan. The entry of Specialist surveys here indicates the intention to claim up to 80% of the value of the survey(s) up to a total value of £5,000 for the plan, after completion of the verification process.



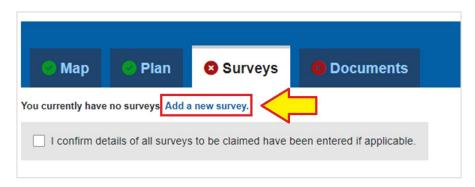
If you have no specialist surveys to add:

Tick the box labelled I confirm details of all surveys to be claimed have been entered if applicable. This will indicate you have no surveys to enter, and the green tick will appear on the Surveys tab.

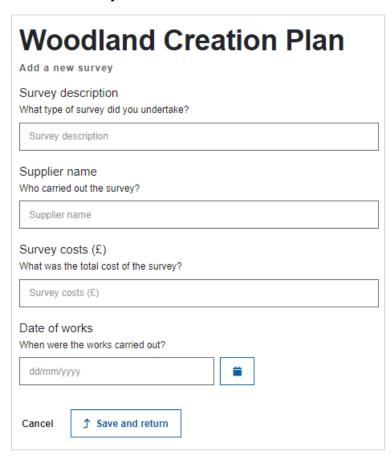


If you have one or more specialist surveys to add:

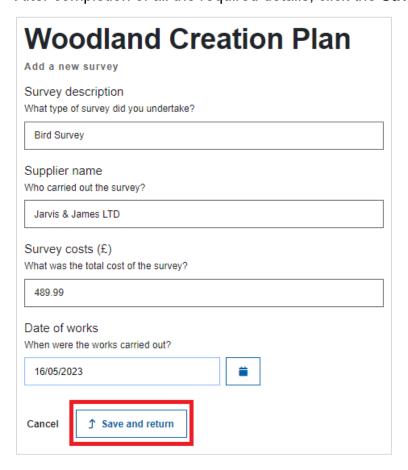
Click Add a new survey



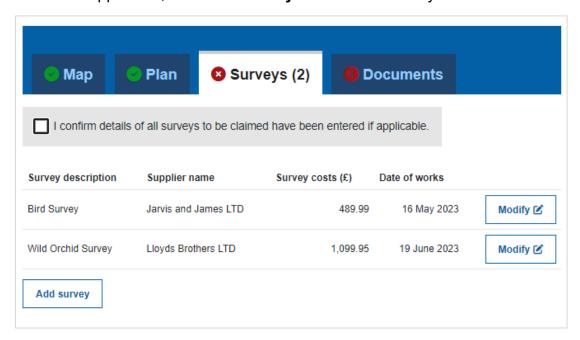
This will take you to a survey details entry page. Please add the survey description, supplier name, the total survey costs and the date when the works were carried out.



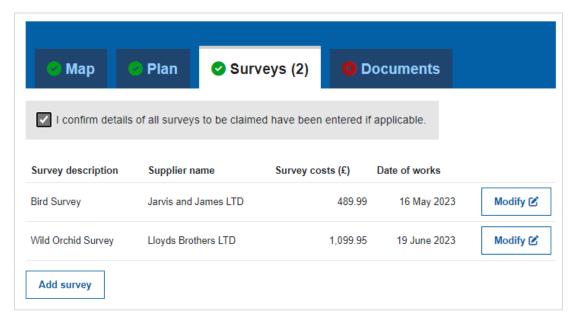
After completion of all the required details, click the **Save and return** button.



After completion you will return to the main Surveys tab. The entered survey details are shown in a table. If applicable, click **Add Survey** to add more surveys.



When you have finished adding surveys, tick the box labelled I confirm details of all surveys to be claimed have been entered if applicable. The green tick will appear on the Surveys tab confirming entry of data in this tab is complete.



Modifying a Survey

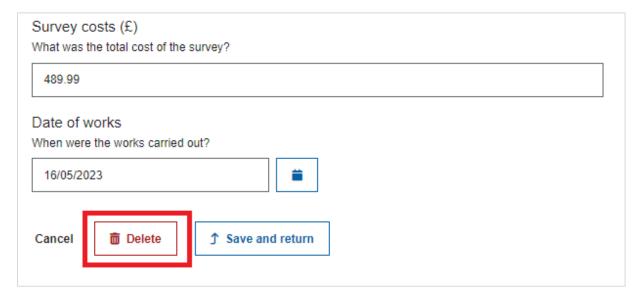
If modification of a survey entry becomes necessary before Plan submission, or if the Plan is returned from NRW for changes during the verification process, click the **Modify** button:



You can now make any changes required to the survey and click Save and return to finish.

Deleting a Survey

If deletion of a survey is required, click **Modify** on the required record in the Survey tab then click the **Delete** button:

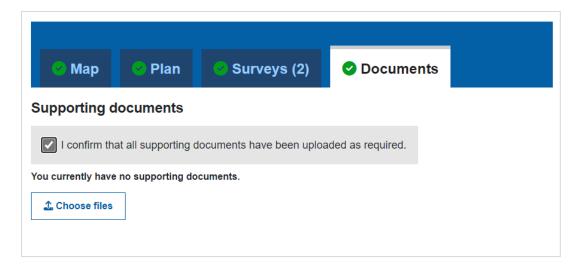


The Documents Tab

The Documents tab will allow you to add any documents that may be required to support the Plan. You may add Adobe PDF (pdf), Microsoft Office (xls, xlsx, doc, docx, ppt, pptx, mpp, vsd, rtf), Pictures (jpg, jpeg, tif, tiff) or Zip files (zip).

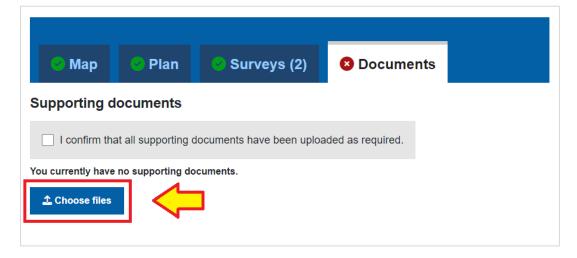
If you have no Supporting Documents to add:

Tick the box labelled I confirm that all supporting documents have been uploaded as required. This will indicate you have no supporting documents to add, and the green tick will appear on the Documents tab.

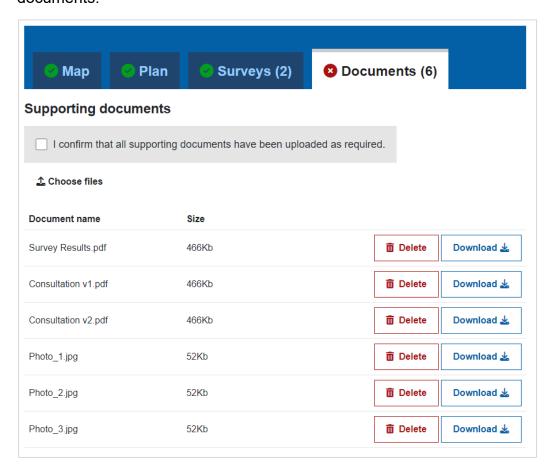


If you have one or more Supporting Documents to add:

Click the **Choose files** button and browse to the file(s) to be uploaded. You may upload multiple documents at once if required.

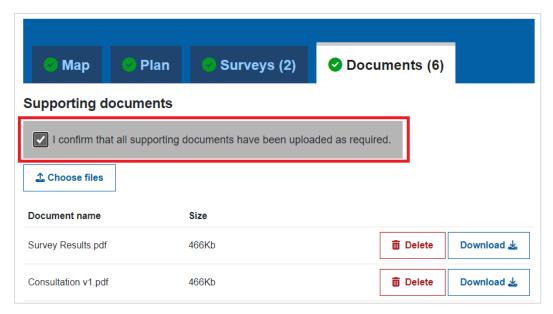


You may upload as many documents as is required. You may also Delete or Download any added documents:



Note that if you upload a file with the same name as a previously uploaded document, the document will be overwritten with the new file. If you wish to upload multiple versions of the same document please ensure you add a version number to the filename (i.e. *Consultation_v1.pdf* or *Consultation_v2.pdf*)

When you have finished adding supporting documents, tick the box labelled **I confirm that all supporting documents have been uploaded as required**. The green tick will appear on the Documents tab confirming entry of data in this tab is complete.

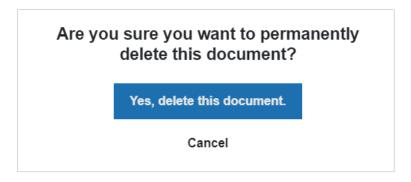


Deleting a Supporting Document

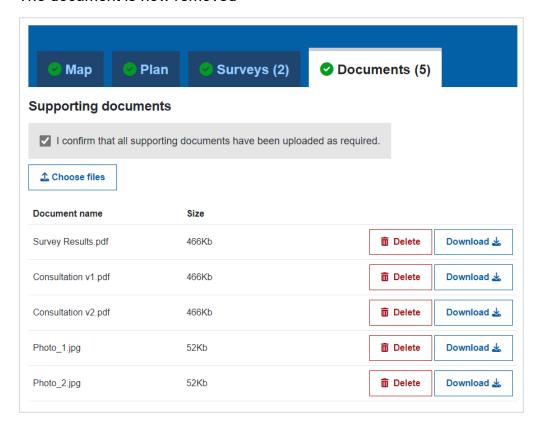
Click the **Delete** button next to the item to be removed



Click **Yes**, **delete this document** to confirm deletion or click **Cancel** to cancel deletion and return to the Documents tab

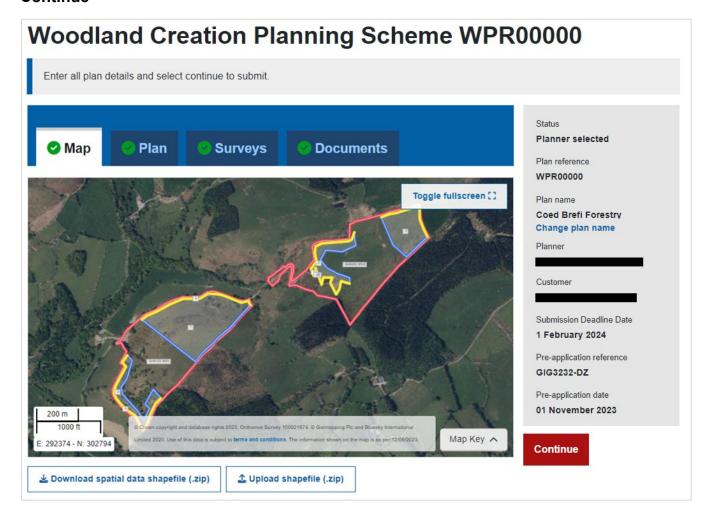


The document is now removed

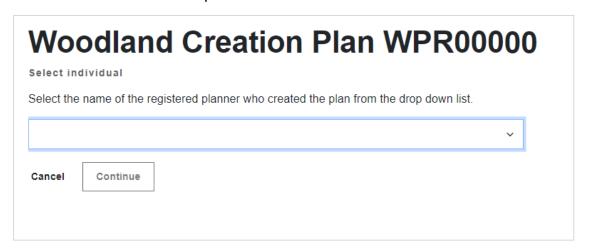


Submitting a Plan

When all four tabs have green ticks indicating their completion, you are now ready to submit the plan for verification. In the bottom right hand corner, the 'Continue' button will appear – click **Continue**



You will be asked to choose the name of the individual planner who created the plan – select the relevant name from the drop down box and click **Continue**.



You will need to read through the terms and conditions of submission. **Tick the box** to confirm, then click **Submit** to continue

Woodland Creation Plan WPR00022

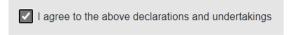
Confirm submission

Successfully saved individual planner.

The woodland planner who created the plan must complete this declaration. The finalised plan can then be submitted to Welsh Government for verification by Natural Resources Wales (NRW).

- I confirm all the information contained in the Woodland Creation Planning Scheme Plan is true, accurate and complete to the best of my knowledge and belief.
- · I confirm I have visited all proposed planting sites.
- · I understand and accept it is my responsibility to ensure this is the case.
- I confirm if there is any change to the information I have provided, I will notify Welsh Government of the change within 10 working days.
- I accept, if any information is outdated, incomplete, misleading or false, the plan may be withdrawn by Welsh Government and passed to another Woodland Planner to complete.

Where considered necessary, the application of sanctions of the Terms and Conditions for the registration of woodland planners will be initiated.



Cancel

Submit

Confirmation of submission will be shown

Woodland Creation Plan WPR00000

Plan submitted

Your plan has been successfully submitted and will now be sent to NRW for verification.

Exit

What Happens Next?

The plan status will change to 'Plan Submitted' and the plan itself will go into a 'read only' state in your woodland plan list. No further changes can be made at this stage.

A submission summary report will be added to the customers RPW Online Messages area, showing the Plan of Operations, the Submitted Map along with information of any surveys added to the plan. The Woodland Creation Plan template, and any supporting documents will also be attached to the message.

After a brief check of the submitted data, the plan will be sent to NRW for verification.

During verification, NRW may contact you for further information or amendments to the plan. If an amendment is required, NRW will change the status of the plan in the Woodland Plan Register to 'In Progress' status, so that you may make any required changes. During amendment, you may replace the Woodland Plan, the supporting documents, the surveys and the Shapefile itself. When ready, and within the deadline set for resubmission, you can resubmit the plan for verification. The plan will again become read only during this stage.

When NRW complete verification, they will return the plan to Welsh Government with their recommendations. After some checks are carried out, verification approval or rejection correspondence will be issued to the customer, along with the approved Plan of Operations and Verified Plan Map.

Appendix A: Description of Plan Status

Your plan will go through a number of different statuses during the planning process. An explanation of each is shown below:

Status	Description
Awaiting Acceptance	Indicates that the plan has been created and is awaiting customer (or agent) acceptance of selection
Selection Accepted	Customer has accepted selection, but plan has not yet been named, or is awaiting choice of woodland planner
Planner Selected	Customer has selected a woodland planner and the plan is awaiting acceptance of invitation by the woodland planner
In Progress	Woodland planner has accepted invitation to become planner for the Plan and can now begin creation of Plan.
Submitted	The woodland planner has finished plan creation and has submitted the finalised plan
Being Verified	The verification process is now underway. Note that if during verification NRW identify that changes are needed, the Plan will be set back to 'In Progress' status, which will allow woodland planners to make any changes necessary before re-submitting the finalised Plan.
Verification Complete	Verification is complete and is awaiting final decision
Approved	The plan has passed verification – you will be issued a plan successfully verified letter and verified plan map. You are now able to claim plan creation fees and survey fees (if applicable, and eligible for payment).
Rejected	The plan has not passed verification and has been rejected – the customer will be notified by letter. The customer will be able to claim survey fees if applicable, and the surveys have been deemed eligible for payment.
Withdrawn	The customer declined selection and therefore the plan has been withdrawn