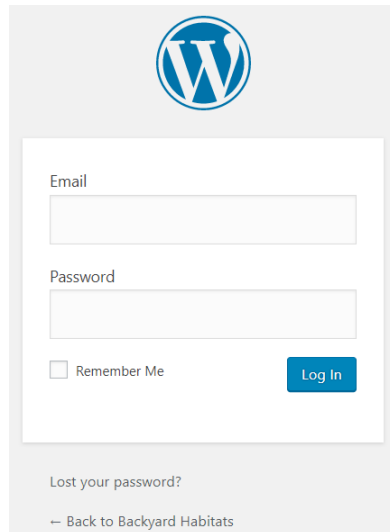


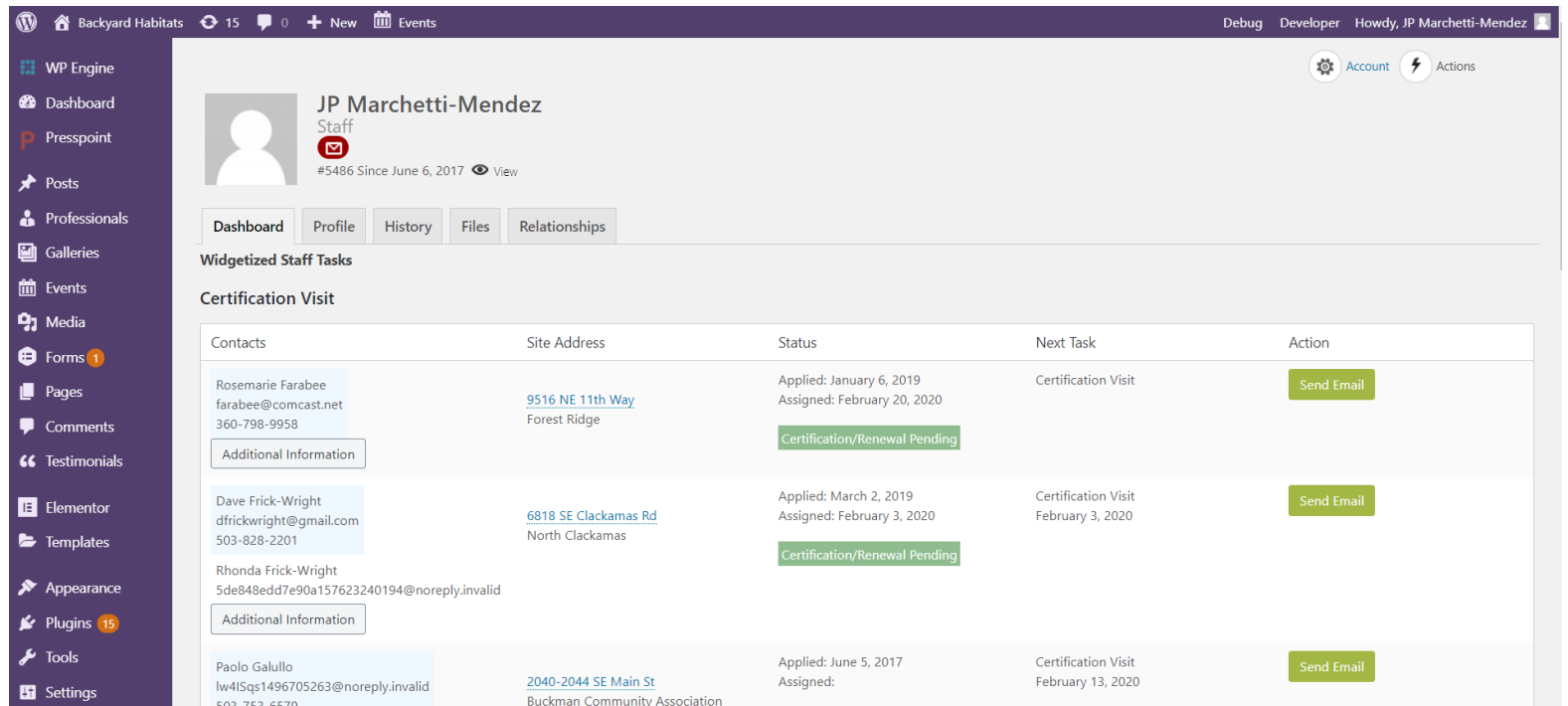
DATA ENTRY FOR INITIAL VISITS

These are the steps to process an initial site visit data:

1. Login to Presspoint using the link, username, and password provided. This will take you to your dashboard.



The image shows a WordPress login form for a site named "Backyard Habitats". At the top is the WordPress logo. Below it are two input fields: "Email" and "Password". Under the password field is a checkbox labeled "Remember Me" and a blue "Log In" button. At the bottom, there is a link "Lost your password?" and a link "← Back to Backyard Habitats".



The image shows the WordPress dashboard for a user named JP Marchetti-Mendez, who is a staff member. The dashboard has a dark purple sidebar with various menu items: WP Engine, Dashboard, Presspoint, Posts, Professionals, Galleries, Events, Media, Forms (1), Pages, Comments, Testimonials, Elementor, Templates, Appearance, Plugins (15), Tools, and Settings. The main content area shows the user's profile, tabs for Dashboard, Profile, History, Files, and Relationships, and a section titled "Widgetized Staff Tasks". This section contains a table with the following data:

Contacts	Site Address	Status	Next Task	Action
Rosemarie Farabee farabee@comcast.net 360-798-9958 Additional Information	9516 NE 11th Way Forest Ridge	Applied: January 6, 2019 Assigned: February 20, 2020 Certification/Renewal Pending	Certification Visit	Send Email
Dave Frick-Wright dfrickwright@gmail.com 503-828-2201 Rhonda Frick-Wright 5de848edd7e90a157623240194@noreply.invalid Additional Information	6818 SE Clackamas Rd North Clackamas	Applied: March 2, 2019 Assigned: February 3, 2020 Certification/Renewal Pending	Certification Visit February 3, 2020	Send Email
Paolo Galullo lw4lSqs1496705263@noreply.invalid 503-753-6579	2040-2044 SE Main St Buckman Community Association	Applied: June 5, 2017 Assigned:	Certification Visit February 13, 2020	Send Email

2. Find the property that you are looking for in the dashboard, and click on the site address hyperlink.

The screenshot shows the Backyard Habitats dashboard for staff member JP Marchetti-Mendez. The dashboard includes a sidebar with navigation links and a main content area with a table of certification visits. A red arrow points to the site address hyperlink for Rosemarie Farabee.

Staff Profile: JP Marchetti-Mendez, Staff, #5486 Since June 6, 2017. Tabs: Dashboard, Profile, History, Files, Relationships.

Widgetized Staff Tasks: Certification Visit

Contacts	Site Address	Status	Next Task	Action
Rosemarie Farabee farabee@comcast.net 360-798-9958 Additional Information	9516 NE 11th Way Forest Ridge	Applied: January 6, 2019 Assigned: February 20, 2020 Certification/Renewal Pending	Certification Visit	Send Email
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In the Property Profile page:

3. Check that the **city**, **state**, **postal code**, **neighborhood**, and **county** fields are not blank or misspelled.

NOTE: In case any errors are found, please alert Rachael with the property hyperlink. Do not correct the data yourself.

4. Change **Site Status** to In Progress.
5. Select the **Property Type** field.
6. Change the **Next Task** to Follow Up Phone Call.
7. In the **Task Date** field, pick a date 6 months ahead.
8. Keep your name in the **Next Task Assigned** field.
9. Click the **Save** button.
10. Click the **Actions** button (top right corner) and select **Initial Assessment**.

The screenshot shows the 'Property Profile' page for '9912 NE 34th Pl'. The page is divided into several sections: 'Address Organization', 'Address Line One', 'Address Line Two', 'City', 'State', 'Country', 'Postal Code', 'Property Neighborhood', 'Property County', 'Watershed', 'City (or Unincorporated) of Site', 'Billable to', 'Site Status', 'Application Date', 'Property Type', 'Total Lot', 'Plantable', 'Naturescaped', 'Certification', 'Widgetized Relationships', 'Individuals', 'Assignment Date', 'Next Task', 'Task Date', 'Next Task Assigned', and 'Widgetized History'. Red arrows point to the following fields: 'Site Status' (set to 'In Progress'), 'Property Type' (set to 'Single-Family Residential'), 'City' (set to 'Vancouver'), 'State' (set to 'Washington'), 'Postal Code' (set to '97206'), 'Property Neighborhood' (set to 'Woodstock'), 'Property County' (set to 'Multnomah'), 'Next Task' (set to 'Follow up Phone Call'), 'Task Date' (set to '2020-08-04'), 'Next Task Assigned' (set to 'JP Marchetti-Mendez'), and the 'Actions' button in the top right corner. A dropdown menu is open from the 'Actions' button, showing options: 'Certification', 'Email', 'Form', 'Initial Assessment', 'Note', 'Private File', 'Rating', and 'Renewal'. The 'Initial Assessment' option is highlighted with a red arrow. A 'SAVE' button is visible in the top right corner.

9912 NE 34th Pl
Property
e93e05b66a09ef157625540808@noreply.invalid
#19763 Since December 13, 2019 View

Profile History

Address Organization
The company or organization at this address.

Address Line One
Typically, this is a street address

9912 NE 34th Pl

Address Line Two

City
Vancouver

State
Washington

Country

Postal Code
97206

Property Neighborhood
Woodstock

Property County
Multnomah

Watershed
Willamette

City (or Unincorporated) of Site
Select Some Options

New Term + Manage

Billable to

☐ I am outside the Program Area but want to be notified when the program expands

Site Status
In Progress

Application Date
2018-11-07

☒ Application fee paid?

☒ The size of my yard is 1 acre or smaller

Property Type
Single-Family Residential

Total Lot: 7036 sqft
Plantable: 3010 sqft
Naturescaped: 1050 sqft
Naturescaped: 34.88% %
Certification: Gold

Widgetized Relationships

Individuals
[Virginia Ross](#) (primary contact)
Renewal :

Assignment Date
2020-02-04

Next Task
Follow up Phone Call

Task Date
2020-08-04

Next Task Assigned
JP Marchetti-Mendez

Widgetized History
[Assessed : December 16, 2017 by Catherine Goode](#)
[Follow up Call: August 31, 2018 by Catherine Goode](#)
[Corrected Site Report: September 26, 2019 by Catherine Goode](#)

Account Actions

Certification
Email
Form
Initial Assessment
Note
Private File
Rating
Renewal

SAVE

11. In the panel that opens on the right, enter the data of the paper site visit form into the appropriate fields, including:

- Assessment Date
- Technician
- Certification Level (In Progress or Certification Level)
- Watershed
- Onsite Natural Water Source (if applicable)
- Lake Oswego Demo Site (if applicable)
- Total Lot Size
- SQ FT plantable area
- SQ FT Naturescaped

NOTE: % Naturescaped is auto-calculated.

- All remaining fields in the Assessment Base Data area.

NOTE2: NEVER use “N/A” or “none” for blank fields. Simply leave them blank.

NOTE 3: NEVER use the blank field or Manage hyperlink to add a new term to the choices.

12. Click the Save button.

× CLOSE SAVE ▼

Assessment Checklists

Assessment Date <input type="text" value="2019-09-12"/>	Total Lot Size <input type="text" value="11657"/>
Technician <input td="" type="text" value="Bethany Wray" ▼<=""/> <td>SQ FT plantable area <input td="" type="text" value="8370" ←<=""/></td>	SQ FT plantable area <input td="" type="text" value="8370" ←<=""/>
Certification Level <input type="text" value="▼"/>	SQ FT Naturescaped <input type="text" value=""/>
Watershed <input type="text" value="▼"/>	Percentage Naturescaped (SQ FT Naturescaped) / (SQ FT plantable area) <input td="" type="text" value="5.08%" ←<=""/>
Onsite Natural Water Source <i>e.g. creek, stream, natural pond. No man-made water features.</i> <input td="" type="text" value="none" ←<=""/> <td></td>	
<input type="checkbox"/> Lake Oswego Demo Site?	

Assessment Base Data

Cats <input type="checkbox"/> Indoor/Enclosure Only <input checked="" type="checkbox"/> Indoor/Outdoor <input type="checkbox"/> None <input type="text" value="New Term"/> <input type="button" value="+"/> Manage ←	Oakscaping <input td="" type="text" value="No oak tree(s) present." ▼<=""/>
Canopy Layers <input checked="" type="checkbox"/> 1. Ground Cover/Grass/Bulb	Wildlife Stewardship <input type="checkbox"/> 1. Bird/Bat Nest Boxes <input type="checkbox"/> 2. Keeps Cats Indoors <input type="checkbox"/> 3. Native Pollinator Meadow <input checked="" type="checkbox"/> 4. Pollinator & Beneficial Insect Nesting Habitat

NOTE: You can easily edit an Initial Assessment Form by clicking the “Assessed” hyperlink in the widgetized history of the property profile, or by going to the History tab and clicking on the Initial Assessment hyperlink.

NOTE 2: NEVER use the Actions > Initial Assessment button to edit an initial assessment. Doing so will create a new site assessment form instead.

Property Type

Single-Family Residential ▼

Total Lot: 42837 sqft

Plantable: 39023 sqft

Naturescaped: 2232 sqft

Naturescaped: 5.72% %

Certification: Not Certified

Assignment Date

2020-02-03

Next Task

Certification Visit ▼

Task Date

2020-02-03

Next Task Assigned

JP Marchetti-Mendez ▼

Widgetized History

[Assessed : March 13, 2019 by Anya Pickard](#)



5715 SE Knight St

Property

41a3ef514bd872157623404847@noreply.invalid

#10863 Since December 13, 2019 [View](#)

Profile

History



September 26, 2019

[Corrected Site Report](#)

The updated Site Report has corrected Plantable Space number. Attempted but was unable to delete original site report.

- Catherine Goode



September 18, 2019

Silver [Certification](#)



August 31, 2018

[Follow up Call](#)

Planning on planting some natives this winter. Working on invasives and a wildlife stewardship item

- Catherine Goode



December 16, 2017

[Initial Assessment](#)

Filter Actions

- ☐ Certification (1)
- ☐ Email
- ☐ Form
- ☐ Initial Assessment (1)
- ☐ Note (2)
- ☐ Private File
- ☐ Rating
- ☐ Renewal