UNITED STATES DEPARTMENT OF AGRICULTURE
Farm Service Agency
Washington DC 20250

Notice AO-1328

For: State and County Offices

FY 2005 Mid-Year Workload Reporting

Approved by: Acting Deputy Administrator, Management

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1 Overview

A Background

Each workload cycle, instructions are provided by BUD for State and County Offices to perform workload reporting.

B Purpose

This notice informs State and County Offices:

- that 12-AO (Rev. 21), Amend. 3 contained the following updated information to complete the FY 2005 mid-year workload report (FSA-55-1):
  - Exhibit 13 for instructions on completing FSA-55-1, including specific information about each work item
  - Exhibit 14 for display reference of the FSA-55-1 report format
  - Exhibit 17 for information to assist in making projections for FY 2005
- that County Software Release No. 559/560 containing the FY 2005 updated FSA-55-1 report and query software, will be overnight mailed on **March 28, 2005**

  Note: State Software Release No. 451 will be sent regular mail.
- the query process must be run before installing County Release No. 561
- of instructions for running the query process
- of the use of web-queries for the mid-year report
- of instructions for using the Workload Query Adjustment Worksheet
- of State Office transmission deadline date to KC-ADC.

Disposal Date	**Distribution**
October 1, 2005	State Offices; State Offices relay to County Offices

1 Overview (Continued)

C Contact

State Offices should direct questions about this notice to either of the following:

- Vicki Larson, BUD at 202-720-2501
- Carol Fleming, BUD at 202-720-9865.

2 12-AO (Rev. 21), Amend. 3

A Exhibit 13

State and County Offices shall refer to 12-AO (Rev. 21), Exhibit 13 when completing each work item on FSA-55-1. Exhibit 13 contains the following information:

- County and State Office actions to complete workload reporting
- whether the unit count is a query, web-query, query plus manual, query printout – query does not load, filled by KC-ADC, or manual count
- title
- unit of measure and when unit is complete
- specific information about a work item
- activities that may or may not be included in a work item, especially applicable to workday, hour, or manual unit counts
- comparison information that may be used in reviewing workload report.

B Exhibit 14

12-AO (Rev. 21), Exhibit 14 provides a display reference of the FY 2005 FSA-55-1 report software.

C Exhibit 17

12-AO (Rev. 21), Exhibit 17 has been updated to assist State and County Offices with estimates for FY 2005. The information provided in Exhibit 17 is for FY 2005 activity as compared to actual FY 2004 activity. State and County Offices should consider the total of entries in columns 2 and 3 as compared to the FY 2004 actual unit count when using Exhibit 17. Exhibit 17 should be provided to State Office Program Specialists for entry of additional recommendations applicable for County Offices in their State for FY 2005.

3 County Office Action

A County Office Responsibilities

CED's and FLM's shall review 12-AO (Rev. 21), paragraph 9918 for training requirements for all employees assisting with completion of FSA-55-1. In addition to the training information referenced in the paragraph, the following information should especially be emphasized:

- paragraph 9914 for monitoring the WM/WL Home Page
- paragraph 9919 for combined county and Type 1 office reports
- paragraph 9920 to review FSA-55-1
- paragraphs 9940 through 9951 for automation activities
- paragraph 9952 for processing work item queries
- Exhibit 13 for work item description and comparison instructions
- Exhibit 17 for estimates for FY 2005.

B Processing Work Item Queries

Before processing the work item queries, County Offices shall:

- install County Software Release No. 559/560, which will be sent by overnight mail from KC-ADC on March 28, 2005

- ensure that all program data and WLS codes have been loaded in the system before running queries.

Note: Do **not** run the queries until April 1, 2005.

County Offices shall follow instructions in 12-AO (Rev. 21), paragraph 9952 to process the work item queries for all county files located on the system. **County Offices should pay special attention to instructions provided in the paragraph for action to take if error messages are received during the link-unlink process**. **It is very important that County Offices do not ignore error messages**. County Offices shall do all of the following:

- use the official queries developed by the National Office

  Note: Do **not** attempt to modify the queries. Whether using the option to run all queries or each individual query, **each query should be run only once**, unless otherwise instructed by Budget Workload Reporting Information posted on the WM/WL Home Page.

3 County Office Action (Continued)

B Processing Work Item Queries (Continued)

- attach a copy of the query report to FSA-55-1
- have the query reports available for DD and COR reviews.

Once the query process is complete, the unit counts for those work items will be automatically entered on FSA-55-1, column 2, except for work items that indicate a web-query or query printout. Query print out units should be verified as accurate by the County Office and manually entered on FSA-55-1. County Offices may print a preliminarily FSA-55-1 to review the query work item units.

An explanation of each query and associated files and records used to count units is provided in the Query Book posted on the WM/WL Home Page.

C Web Query Entries

BUD has historically queried units from files located on the System 36 and AS/400 for workload reporting purposes. As more County Office processes move to a web environment, BUD considered necessary changes in the method of capturing unit counts for County Office workload reports. BUD has requested development of web-queries by KC-ADC to pull specific unit information by County Office. These units will be downloaded into the individual County Office FSA-55-1 after transmission from the State Office on April 21, 2005, and before transmission from KC-ADC to the National Office on or about April 28, 2005. For this reason, it is very important that County Offices adhere to the county transmission schedule provided by their individual State Office so a timely transmission of the State's workload data is possible.

With this new process at mid-year, the units captured by the web-queries will not be available to State and County Offices until the mid-year workload reports are released in June. As many of you are aware, BUD has secured a study by contractors of the Workload and Work Measurement System. During the migration period to Performance Measurement and Management, there may be times when the workload and work measurement process does not provide all information that the State and County Offices have had access to in the past. However, as BUD's web-based process is eventually migrated to the web environment, State and County Offices will be able to view their workload reporting information through a reports menu at any time.

3 County Office Action (Continued)

D Adjusting Query Counts

Some query counts may require an adjustment for a manual count because certain activities are not captured by the query. When applicable adjustments according to 12-AO (Rev. 21), Exhibit 13 or BUD Workload Reporting Information are required for a query count, County Offices shall use the fillable Workload Query Adjustment Worksheet. The Workload Query Adjustment Worksheet will be posted on the WM/WL Home Page under the "Queries" option on or about April 8, 2005.

County Offices shall do the following to complete the worksheet:

- access the WM/WL Home Page according to 12-AO (Rev. 21), paragraph 9914
- click on the "Query" option
- click on the "Query Adjustment Worksheet" option
- using the File options, save the query worksheet to a folder prior to making entries
- using the saved version of the worksheet, select State and county from the drop-down box in the instruction area at the top of the screen

  Notes: Only reporting offices shall prepare a Workload Query Adjustment Worksheet. The combined query and manual counts for all counties in the reporting office's report shall be used.

  Do not make changes to/or add additional work items to the Query Adjustment Worksheet. **Do not** make entries on the worksheet for a work item unless a change to the unit count is being requested.

- enter the **original query** unit count displayed on FSA-55-1, if applicable
- enter the **manual count** to be added to the original query
- enter the appropriate explanation for the manually counted unit requested

  Note: "Manual Count", "Query is wrong", or "Not entered in system" are not acceptable explanations and adjustments to the query will **not** be made when used. **Use explanations provided in 12-AO (Rev. 21), Exhibit 13 or Workload Reporting Information on WM/WL Home Page**.

- when all adjustments have been made and verified, e-mail the completed worksheet to the designated State Office contact person by State Office designated date.

Note: County Offices that experience difficulty in accessing the Query Adjustment Worksheet shall request a copy by e-mail from the State Office.

3 County Office Action (Continued)

D Adjusting Query Counts (Continued)

If County Offices do not agree with query counts for work items **other than those listed on the Query Adjustment Worksheet**, a memorandum must be prepared and sent through the State Office to the National Office for the National Review. The memorandum **must** contain the following information:

- State and county code of the reporting county
- original query unit count from FSA-55-1
- additional manual count being requested
- revised total unit count
- attached documentation to support the revised unit count.

Note: Adjustments to the query count will not be considered unless documentation supporting the revised unit count is provided.

E Merging Combined County Office Reports

County Offices that have a combined County Office situation where a closed or part-time county is part of the combination, shall follow the instructions in 12-AO (Rev. 21), paragraph 9950 to create a data tape for the closed or part-time county workload files. The headquarters County Office shall follow the instructions in 12-AO (Rev. 21), paragraph 9951 to load the data tape and generate a combined report. Additional information about combined county reports can be found in 12-AO (Rev. 21), paragraph 9919.

County Offices that have a CMA file located on their AS/400 shall follow the instructions in 12-AO (Rev. 21), paragraphs 9950 and 9951 to merge the CMA files into one FSA-55-1 report.

F Adding or Modifying Entries on FSA-55

County Offices shall follow instructions in 12-AO (Rev. 21), paragraphs 9943 and/or 9944 to enter or revise manual unit counts and estimates on FSA-55-1. Command 11 shall be completed following updates to the report to save updated entries.

ITFlash 433 Bulletin (9/23/03) contained instructions for reconfiguring PC's to access FSA-55-1. Each PC that has successfully been reconfigured may access FSA-55-1 rather than using a 3180 or 3197 terminal. County Offices are advised to contact the State Office IT specialist to assist in the reconfiguration process. The bulletin is posted on the WM/WL Home Page under the "Workload" option.

3 County Office Action (Continued)

G Printing and Reviewing Reports

County Offices should ensure that work item unit counts and estimates were completed according to information provided in 12-AO (Rev. 21), Exhibits 13 and 17 and by the State Office Workload Specialist. County Offices should follow instructions in 12-AO (Rev. 21), paragraph:

- 9946 to print the completed report
- 9947 to perform the preliminary validation process.

If a Data Exception and Rejection Report prints, the County Office shall do either of the following:

- correct the unit count if the entry was in error

- provide justification and documentation to the State Office for any work item that will not be adjusted for applicable work item exceptions only as require by 12-AO (Rev. 21), Exhibit 19.

Note: An exception/rejection report will not prevent the transmission of FSA-55-1.

H Transmitting County Office Reports to State Office

County Offices shall follow instructions in 12-AO (Rev. 21), paragraph 9948 to queue FSA-55-1 for transmission by the date provided by the State Office. Only headquarters and full-time sub-offices should queue the FSA-55-1 report. **Do not transmit reports for part-time or closed (B. file) counties**.

It is **extremely important** that County Offices verify on the next start-of-day after FSA-55-1 is queued to ensure that the XXxxxCF2 (XX = State Abbreviation, xxx = county code) file is successfully bundled and listed on the outgoing transmission file. Report transmission problems immediately to the State Office for assistance.

I FLP Guidelines

Only Type 1 County Offices shall report FLP activity. See 12-AO (Rev. 21), subparagraph 9919 C for further clarification. County Offices shall review a forthcoming FLP notice to ensure that the appropriate AgCredit, MAC data fields, and WLS codes have been updated in the system before processing the workload queries. However, 12-AO (Rev. 21), Exhibit 13 should be reviewed for the updated information on whether work items are a web-query, System 36 query, or manual count or whether the query may require a manual adjustment. Several queries were revised or added for year-end. The Query Book posted on the WM/WL Home Page under the “Query” option gives details of each query used for year-end.

3 County Office Action (Continued)

I FLP Guidelines (Continued)

When comparing workload query counts to system generated reports through AgCredit, MAC, or WLS, ensure that the reports are generated on the same day the workload queries are processed. However, it may be helpful to generate reports before March 31, 2005, to ensure that all data has been updated in the system **before running the query process**.

"WLS Not Completed" is not a valid explanation for adjusting query counts. Ensure that activity (appraisals, etc.) completed by State Office employees for the County Office is entered in WLS timely to be captured by query and not forwarded by memorandum for entry during the National Review.

A Work Item/WLS Code Quick Reference Guide has been developed and posted on the WM/WL Home Page under the "Toolbox" Option. County Offices may find it useful to print a copy as a desk reference for use when completing workload reports. The guide will remain posted on the WM/WL Home Page throughout the year and will be monitored and updated as work items or WLS codes change.

J Instructions for Work Measurement

Work Measurement County Offices are reminded that no units shall be entered on FSA-54. KC-ADC will populate the work measurement (FSA-54) second quarter report with units reported on the FY 2005 mid-year workload report (FSA-55-1). If units have already been reported, there is no need to make corrections. KC-ADC will remove any reported units before entering the workload units in the report.

The transmission dates for Work Measurement are as follows:

- County Offices to be set by State Office Workload Specialist
- State Offices to Thursday, April 21, 2005.

4 State Office Action

A State Office Responsibilities

State Offices shall review 12-AO (Rev. 21), paragraphs 9923 through 9925 to ensure that State Office responsibilities are being fulfilled.

The State Office Workload Specialist shall ensure that 12-AO (Rev. 21), Amend. 3 has been distributed to County Offices and are advised that it should be incorporated into the handbook before preparing workload reports. Transmission dates and meeting dates, if applicable, should be provided timely so County Offices have adequate time to prepare and review FSA-55-1.

State Software Release No. 451 must be installed for County Offices to successfully transmit FSA-55-1 reports to the State Office.

4 State Office Action (Continued)

B Monitoring WM/WL Home Page

It is imperative that State and County Offices are informed of the information posted on the WM/WL Home Page during the workload reporting period. Although both State and County Offices have access to the WM/WL Home Page, it is the State Office Workload Specialist's responsibility to ensure that all County Offices are advised of the information timely. Reporting corrections and clarifications will be posted under the "Workload" option on the WM/WL Home Page under the "Workload Reporting Information" option. New information may be updated daily at this web site.

C Verifying Receipt of County Office Transmissions

Before reviewing FSA-55-1 and transmitting to KC-ADC, State Offices shall follow instructions in 12-AO (Rev. 21), paragraph 9969 to ensure that all Reporting County Office transmissions have been received.

D Reviewing and Adjusting Reports

It is vital the State Office Workload Specialist ensures that County Office data has been thoroughly reviewed before submission for the National Review according to instructions in 12-AO (Rev. 21), paragraph 9925. When completing the review, it is important that **both** actual and estimated unit counts are reviewed for accuracy. Work items reported in hours or workdays shall be reviewed and compared to the National or State work measurement average for the applicable work item. State Offices shall review 12-AO (Rev. 21), Exhibit 19 for work items that exceed the system validity checks and request documentation from County Offices to justify the unit count for those work items as required by the exhibit. The review should include Program Specialists and/or DD's. In addition to the comparison report options provided in 12-AO (Rev. 21), paragraphs 9967 and 9968, supplemental queries and instructions have been developed with information and instructions and will be posted on the WM/WL Home Page under the "Query" option in sufficient time for use for the State Office review. State Offices should review the information to determine which queries may best supplement the menu driven comparison reports.

If, during the review process, it is determined that adjustments are required to County Office entries, State Offices shall inform County Offices of changes to their reports. County Offices shall be given the option to provide justification to State Offices for questionable entries. State Offices shall keep justification with the workload report for possible use during the National Review.

E Transmission Deadline Date

All State Offices shall transmit reports to KC-ADC according to 12-AO (Rev. 21), paragraph 9970, on or before April 21, 2005. It will be necessary for the Workload Specialist and ITS to coordinate the queuing and end-of-day process on the day of transmission. State Offices shall follow-up during the next start-of-day to ensure successful bundling and transmission of the XX000CF4 file (XX = State abbreviation).

4 State Office Action (Continued)

E Transmission Deadline Date (Continued)

Verify successful transmission by printing an Outgoing Detail History Report through the telecommunication functions menu. Repeatedly queuing the workload report will **not** solve a missing transmission problem if there is an unknown system problem.

F Forwarding County Office Information to Headquarters

The Query Adjustment Worksheets and all other memorandums and supporting documentation for County Office reports shall be forwarded to the National Office for the National Review. The State Office shall forward these documents to BUD using FedEx or UPS at the following address **by April 26, 2005**:

USDA/FARM SERVICE AGENCY
ATTN: VICKI LARSON, ROOM 4720
1400 INDEPENDENCE AVE, SW
WASHINGTON, DC 20250-0500.

Do **not** forward for National Review:

- by e-mail, reports of the County Office Workload Query Adjustment Worksheet
- copies of the Exception/Rejection Reports, **except** as directed in 12-AO (Rev. 21), Exhibit 19.