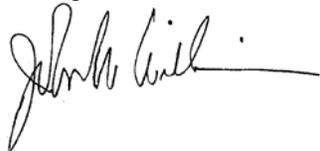


For: State and County Offices

FY 2007 Year-End Workload Reporting

Approved by: Deputy Administrator, Management



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, Amendment 10 will contain the following updated information to complete FY 2007 year-end FSA-55:
 - Exhibit 13 for instructions on completing FSA-55, including specific information about each work item
 - Exhibit 17 for information to assist in making projections for FY 2008
 - Exhibit 18 for display reference of FSA-55 report format
- County Software Release No. 624 containing FY 2007 updated FSA-55 and query software will be mailed on **September 24, 2007**
- of instructions for running the query process
- the query process **must** be run before installing County Release No. 625
- of using web queries for year-end FSA-55
- of instructions for using the Workload Query Adjustment Worksheet
- of State Office transmission deadline to Kansas City-Application Development Center (KC-ADC).

Disposal Date	Distribution
March 1, 2008	State Offices; State Offices relay to County Offices

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1 Overview (Continued)

C Contact

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

- Carol Fleming, BUD, at 202-720-9865 for workload
- Bob McGrath, BUD, at 202-720-1082 for queries.

2 12-AO, Amendment 10

A Exhibit 13

State and County Offices shall refer to 12-AO, Exhibit 13 when completing FSA-55 work items. Exhibit 13 contains the following information:

- State and County Office actions to complete FSA-55's
- whether the unit count is a query, web-query, query plus manual, query printout-query does not load, filled by KC-ADC, entry by National Office, 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 reports.

B Exhibit 17

12-AO, Exhibit 17 has been updated to assist State and County Offices with estimates for FY 2008. The information provided in 12-AO, Exhibit 17 is for FY 2008 activity as compared to actual FY 2007 activity. 12-AO, Exhibit 17 should be provided to State Office program specialists for entry of additional recommendations applicable for County Offices in their State for FY 2008. An electronic version of the exhibit will be provided to each State Office workload specialist for this purpose.

C Exhibit 18

12-AO, Exhibit 18 provides a display reference of the FY 2007 FSA-55 software.

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3 County Office Action

A County Office Responsibilities

CED's and FLM's shall review 12-AO:

- paragraph 9918 for training requirements for all employees assisting with completing FSA-55
- 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
- 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 2008.

B Processing Work Item Queries

Before processing the work item queries, County Offices shall:

- install County Software Release No. 624 that will be mailed from KC-ADC on September 24, 2007
- ensure that all program data has been loaded in the system before running queries.

Note: Do **not** run the queries until **October 1, 2007**.

County Offices shall follow instructions in 12-AO, 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 12-AO, paragraph 9952 for action to take if error messages are received during the link-unlink process.**

Note: It is very important that County Offices do not ignore error messages.

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3 County Office Action (Continued)

B Processing Work Item Queries (Continued)

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 WL Reporting Information posted on the WM/WL Home Page.

- attach a copy of query reports to FSA-55
- 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, column 2, except for work items that indicate web-query or query printout. Query printout units should be verified by County Offices and entered manually on FSA-55. County Offices may print a preliminary FSA-55 to review the query work item units.

C Web-Query Entries

BUD has requested development of web-queries by ITSD-ADC and Farm Credit Applications Office (FCAO) to pull specific unit information by County Office. Excel spreadsheets with the web query units will again be compiled into State reports and provided to State Offices for State and County Office review. **It is very important that County Offices are provided copies of these reports so they can verify their unit counts. State Offices shall forward the web query spreadsheets to the County Offices.**

These units will be downloaded into the individual County Office FSA-55 after transmission from the State Office on **October 18, 2007**. All information will be transmitted from KC-ADC to the National Office on or about **October 26, 2007**. 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 FSA-55 is possible.

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, Exhibit 13 or BUD Workload Reporting Information are required for a query count, County Offices shall use the 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 October 9, 2007.

County Offices shall complete the Workload Query Adjustment Worksheet according to the following.

Step	Action
1	Access the WM/WL Home Page according to 12-AO, paragraph 9914.
2	CLICK “Query”.
3	CLICK “Query Adjustment Worksheet”.
4	Using the “File” options, save the Workload Query Adjustment Worksheet to a folder before making entries.
5	<p>Using the saved version of the Workload Query Adjustment Worksheet, select “State and county” from the drop-down box in the instruction area at the top of the screen.</p> <p>Notes: Only reporting offices shall prepare a Workload Query Adjustment Worksheet. The combined query and manual counts for all counties in the reporting offices shall be used. Do not make:</p> <ul style="list-style-type: none"> • changes to/or add additional work items to the Workload Query Adjustment Worksheet • entries for a work item unless a change to the unit count is being requested.
6	Enter the original query unit count displayed on FSA-55, if applicable.
7	<p>Enter the manual count to be added to the original query.</p> <p>Note: FSA-55 has been pre-filled with the generally accepted explanation for requesting a manually counted unit. If the manual counts for the work item are for a purpose other than provided for by the pre-filled explanation, the County Office should provide a memorandum with supporting documentation as described in step 10.</p>
8	Save the document to a folder.
9	<p>When all adjustments have been made and verified, e-mail the completed Workload Query Adjustment Worksheet to the designated State Office contact person by the State Office designated date.</p> <p>Note: County Offices that experience difficulty in accessing the Workload Query Adjustment Worksheet shall request a copy by e-mail from the State Office.</p>

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3 County Office Action (Continued)

D Adjusting Query Counts (Continued)

Step	Action
10	<p>If County Offices do not agree with query counts for work items or explanations other than those allowed for on the Workload 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:</p> <ul style="list-style-type: none">• State and county code• original query unit count• additional manual count being requested• revised total unit count• attached documentation to justify the revised unit count. <p>Note: Adjustments to the query count will not be considered unless documentation supporting the revised unit count is provided.</p>

E Merging Combined County Office Reports

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

County Offices that have a CMA file located on their System 36/AS 400 shall follow the instructions in 12-AO, paragraphs 9950 and 9951 to merge the CMA files into one FSA-55.

F Adding or Modifying Entries on FSA-55

County Offices shall follow instructions in 12-AO, paragraphs 9943 and/or 9944 to enter or revise manual unit counts and estimates on FSA-55. After updating FSA-55, PRESS “F11” on the PC keyboard to save updated entries.

When accessing FSA-55 from a PC, error messages may be encountered. Instructions for reconfiguring PC’s to access FSA-55 have been posted on the WM/WL Home Page under the “Workload” option, “Link to Access FSA-55 from PC”. Each PC that has been successfully reconfigured may access FSA-55 rather than using a System 36 terminal. County Offices are advised to contact the State Office IT Specialist to assist in the reconfiguration process.

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3 County Office Action (Continued)

G Printing and Reviewing FSA-55

County Offices should ensure that work item unit counts and estimates were completed according to information provided in 12-AO, Exhibits 13 and 17 and by the State Office Workload Specialist. County Offices should follow instructions in 12-AO, paragraph 9946 to print the completed FSA-55.

H Transmitting County Office FSA-55 to State Office

County Offices shall follow instructions in 12-AO, paragraph 9948 to queue FSA-55 for transmission by the date provided by the State Office. Only headquarters and full-time sub-offices should queue FSA-55's. **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 is queued to ensure that the XXxxxCF1 (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

In addition to instructions in this notice, an FLP notice for reporting workload is forthcoming and will provide information on updates that must be made in the system to capture unit counts for FY 2007 activity.

4 State Office Action

A State Office Responsibilities

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

The State Office Workload Specialist shall ensure that:

- 12-AO, Amendment 10 has been distributed to County Offices
- County Offices are advised that it should be incorporated into 12-AO before preparing WL reports
- all web query reports provided by BUD **shall** be forwarded to County Offices for review.

Transmission dates and meeting dates, if applicable, should be provided timely so County Offices have adequate time to prepare and review FSA-55.

County Office Software Release No. 624 must be installed on the State Office System 36 for County Offices to successfully transmit FSA-55 to the State Office.

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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 WL 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 on the WM/WL Home Page.

C Verifying Receipt of County Office Transmissions

Before reviewing and transmitting FSA-55's to KC-ADC, State Offices shall follow instructions in 12-AO, paragraph 9969 to ensure that all reporting County Office transmissions have been received.

D Reviewing and Adjusting Reports

It is vital the State Office WL Specialist ensures that County Office data has been thoroughly reviewed **before** submission for the National Review according to 12-AO, paragraph 9925. When completing the review, it is important that **both** actual and estimated unit counts are reviewed for accuracy. Since the FY 2007 Workload Report is expected to be the final report using the current system, it is important that extra attention be given to FY 2008 activity. Until the Activity Reporting System is implemented nationwide and the workload replacement system is in place, the FY 2008 estimates will be the main source of information.

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 FSA-55's. County Offices shall be given the option to provide justification to State Offices for questionable entries. State Offices shall keep justification with FSA-55's for possible use during the National Review.

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4 State Office Action (Continued)

E Transmission Deadline Date

All State Offices shall transmit reports to KC-ADC according to 12-AO, paragraph 9970 on or before October 18, 2007. It is necessary for the Workload Specialist and IT staff to coordinate the:

- queuing before the end-of-day process on the day of transmission
- follow-up during the next start-of-day to ensure successful bundling and transmission of the XX000CF3 file (XX = State abbreviation).

Verify successful transmission by printing an Outgoing Detail History Report through the telecommunication functions menu. Repeatedly queuing FSA-55's will **not** solve a missing transmission problem if there is an unknown system problem.

F Forwarding County Office Information to the National Office

Workload Query Adjustment Worksheets and all other memorandums and supporting documentation for County Office FSA-55's shall be forwarded to the National Office for the National Review. State Offices shall forward these documents to BUD using FedEx at the following address **by October 23, 2007**:

USDA/FARM SERVICE AGENCY
ATTN: CAROL FLEMING, ROOM 4724
1400 INDEPENDENCE AVE, SW
WASHINGTON, DC 20250-0500
Telephone: 202-720-9865.

Do **not** forward County Office Workload Query Adjustment Worksheets by e-mail for National Review.