ESA Webtool Checklist

BA Development and Submittal Process

This checklist was developed to help Project Managers work through the BA development, submittal and review process using the ESA Webtool. For clarification or a more detailed description of a given step, please refer to "How To Guide" in the Help Resources menu (http://www.environment.fhwa.dot.gov/esawebtool). For further clarification, questions can be submitted to ESAWebtool@dot.gov.

Task	Complete (Y / N)	Completed Date/Deadline
1. Set-up		
Create new Online File Cabinet.		
Invite project team to Online File Cabinet. Go to "**Team Drawer**" and "**Add a Team Member.**" Hint: Start with Team Members and an alternate Project Manager. New site users will need to "create an account" to log-in to the Online File Cabinet.		
Add important dates or events to the calendar.		
2. Ongoing File Cabinet Management Activities		
Manage project team. "Team Members," "Reviewers" and "Project Managers" may be added throughout the BA development, submittal and review process.		
Update status table (percent complete and start/end dates). The information in "File Cabinet Status" will appear in the BA Status Report.		
Send messages to the "Inbox" drawer to save them as part of the administrative record (*Everyone with access*).		
Post events on calendar to help coordinate team (meetings, due dates).		
3. Draft BA		
Use National BA Template to create Draft BA document.		

Task	Complete (Y / N)	Completed Date/Deadline
Update the "*3. Draft BA*" step in the **Status Table** to "**in progress**" and indicate start/end dates and assignments.		
Post events on **calendar** to help coordinate team (meetings, milestones).		
Upload draft BA and other materials to "**Working**" file drawer to share documents with team (*Project Manager and Authors have access to this drawer*).		
Send messages to the "**Inbox**" drawer to save them as part of the administrative record (*Everyone with access*).		
Change status to "**complete**" when draft is posted and ready for DOT/FHWA review.		
4. DOT/FHWA Review		
Add DOT/FHWA Reviewers as "Team Members" (Go to "**Team Drawer**" and "**Add a Team Member**").		
Update the "*2. Review by DOT/FHWA*" **Status Table** step in the status table to "**in progress**" and indicate start/end dates and assignments.		
Notify DOT/FHWA to initiate BA review process.		
Post events on **calendar** to help coordinate DOT/FHWA review (meetings, due dates).		
DOT/FHWA Reviewers upload comments/edits to the "**Working**" file drawer.		
Send messages to the "**Inbox**" drawer to save them as part of the administrative record (*Everyone with access*).		
Change the "*2. Review by DOT/FHWA*" **Status Table** step in the status table to "**complete**" when all review comments received.		
5. Ready to Consult		

Task	Complete (Y / N)	Completed Date/Deadline
Update the "3. *BA Ready for Consultation*" step in the **Status Table** to "**in progress**" when all review comments received.		
Indicate start/end dates and assignments in **Status Table.**		
Post events on **calendar** to help coordinate incorporation of DOT/FHWA comments.		
Finalize BA documents, upload final files, supporting documents and photos to the "**Working**" file drawer.		
Change the "*3. Review by DOT/FHWA*" **Status Table** step in the status table to "**complete**" when BA document is finalized.		
6. Submit to Services		
Convert final BA documents to PDF.		
Post PDF of BA to the "**Completed**" file drawer (200 MB max file upload size).		
Post supporting files and photos separately to the "**Completed**" file drawer, if necessary.		
Delete unnecessary files from the "**Working**" file drawer.		
Add **Reviewers** to the project team. (Go to "**Team Drawer**" and "**Add a Team Member**"). Note: New site users will need to "create an account" to log-in the Online File Cabinet; **Reviewers** will only be able to view files in the "**Completed**" file drawer.		
Verify that reviewers have received the invitation to the Online File Cabinet and have successfully logged on/accessed the "**Completed**" file drawer. **Note: Only DOT or FHWA has the authority to submit the BA to the Services.**		
Update the "*4. Submitted to the Services*" step in the **Status Table** to "**in progress.**"		
Indicate start/end dates and assignments in **Status Table** (duration should be **135 days**).		

Task	Complete (Y / N)	Completed Date/Deadline
Send messages to the "**Inbox**" drawer to save them as part of the administrative record (*Everyone with access*).		
Upload comments/edits to the "**Completed**" file drawer.		
Change the "*4. Submitted to the Services*" step in **Status Table** to "**complete**" when Letter of Concurrence (LC) or Biological Opinion (BO) is issued.		
7. LC or BO		
Post LC or BO to "**Completed**" file drawer.		
Change the "*5. Letter of Concurrence or BO Issued*" step in **Status Table** step to "**complete.**"		
8. Re-initiation		
Change the "*6. Re-Initiation*" step in the **Status Table** to "**in progress.**"		
Set start/expected end dates and assignments in **Status Table.**		
Post amendments to the "Working" file drawer.		
Repeat Task 4 – 7.		
Change the "*6. Re-Initiation*" step in **Status Table** step to "**complete**" once re-initiated consultation complete.		
9. Archive		
Ensure all vital information is downloaded to project archives (e.g., Final BA, BO or LC) per agency policy once project is complete.		
Redact any site-specific or location specific information contained in final documents saved in the "**Completed**" file drawer to ensure the continued protection of any listed species in the site vicinity.		
Change the "*7. Archive*" step in **Status Table** step to "**complete**" once re- initiated consultation complete.		

Exit the Online File Cabinet.		
Task	**Complete (Y / N)**	**Completed Date/Deadline**
Go back to your list of projects. Click on the "**Edit**" button for your project. Change status from "**Active**" to "**Archive**" and confirm the "**Consultation Type**" (informal/formal) is correct. Click "Finish" when done.		