california
almonds®
Almond Board of California

# Quickstart Guide

## GROWER SELF-ASSESSMENT

CASP™

# Let's Get Started!

## About the California Almond Stewardship Platform

The California Almond Stewardship (CASP) Self-Assessment is led by the Almond Board of California. CASP uses production and management information from growers like you to demonstrate the sustainability of the almond industry. It also provides you information on more efficient production methods, including cost-effective, environmentally and socially responsible practices.

The CASP online system is made up of a self-assessment of practices and several interactive tools designed to help you streamline decision making and reporting requirements.

You can access the CASP online system at **www.almondstewardship.org**.

## Using This Guide

The purpose of this guide is to make the online system easier for first-time users. The guide highlights primary workflows and processes using images, detailed instructions, and clarifications. If you have questions about your CASP account that are not answered in this guide, email the support desk for assistance at casp@sureharvest.com.

## 1. Creating an Account

To create a new account, select the green "Create Account" button at the center of the screen to begin this process.
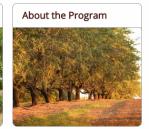
When you reach the initial landing page, log in or create an account if you do not already have one.

If you already have an account, but forgot your login information, select "I Forgot" near the login section. If this does not work, please contact our help desk for assistance.

**TIP:** Save the login page to your favorites for easy access when you come back.

## 2. Entering Your Information

After selecting "Create Account", complete the 3 steps by filling in your basic information:
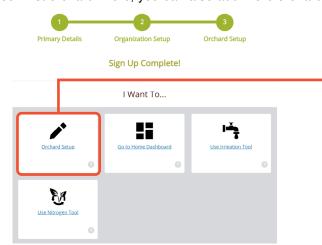


**Step 1:** First, you will input your name and contact information. You can use either a personal email and phone number, or one attached to your business. Next, create a username and password for your CASP Online account.

**Step 2:** Input your primary farming business name. If you have multiple orchards under varying business or enterprise names, input the name you will use most often. The support desk can assist you in updating the name if it changes.

**Step 3:** Pay special attention during this step! You might have more than one orchard. For this step, just provide us with the reference name of *one* of your orchards. You will be able to add your other orchard(s) once your account is created. You can also edit your original orchard info later in the system. Read the Terms and Conditions, mark the checkbox, and click Submit.

From this screen, you can navigate anywhere within the CASP Online System. We recommend clicking Orchard Set Up. This will bring you to Orchard Set Up Summary where you can begin filling out additional information for your first orchard. Here, you can also add more orchards.



## 3. Logging In

When returning to the website, begin at the landing page. Here you can log in to your account using the entry boxes in the lower right of the screen.

# Your Orchards

## 1. Setting Up an Orchard

Next, complete the set up for your orchard. If you have not already navigated there, you can complete the set up for your existing orchard by selecting "Orchard Setup Summary" in the Assessments dropdown menu/ home page under the Assessments section or "Orchard Setup" in the Assessment Overview section.
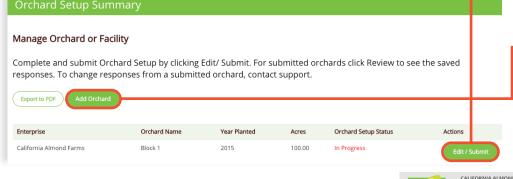
You will need to answer several orchard specific assessment questions. These are completed only one time for the life of the orchard.

These orchard specific assessment questions must be answered and submitted before you can continue on to answer business management and orchard practices assessment questions for that orchard.

**TIP:** If you have more than one orchard, first complete the set up and submission of the orchard you gave the name of during account creation. Then, you can add your other orchard(s) and submit following the same steps.

CALIFORNIA ALMOND STEWARDSHIP PLATFORM ONLINE SYSTEM

CASP

Assessments ∨

Tools to help you maxi...

Assessments Dashboard
Orchard Setup Summary
Clone Assessments
Map Center
Education Text

Complete, rev... orchard prac...

→ Pick up where I left off: Irrigation Management
→ Orchard Setup Summary
→ Go to Assessments Dashboard
→ Clone an assessment
→ Learn about Assessments

→ Calculate my irrigation recommendations
→ Compare my orchards to the 2025 goals
→ Create an irrigation and Nitrogen Management Plan worksheet
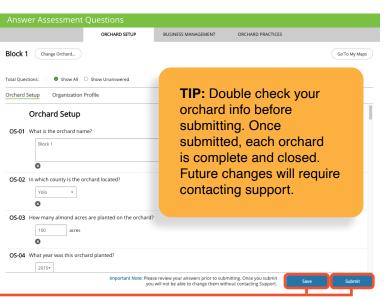→ Learn about all the tools

## 2. Submitting Your Orchard

From the Orchard/Facilities page, click "Edit/ Submit". Complete and verify all relevant information in Orchard Set Up and Organization Profile. If you don't know something you can "Save" and come back later. Click "Submit" once the information is complete.

**Assessment Overview**

**1** Orchard (100 Acres)

**0** out of **1** Assessments Submitted

Orchard Setup

**Grower Data Sharing**

Set up the ability to securely and a... with your handler. This is a strictly ... stop sharing orchard data at any ti...

Click SET UP to start the process of ... handlers.

### Orchard Setup Summary

**Manage Orchard or Facility**

Complete and submit Orchard Setup by clicking Edit/ Submit. For submitted orchards click Review to see the saved responses. To change responses from a submitted orchard, contact support.

Export to PDF    Add Orchard

| Enterprise | Orchard Name | Year Planted | Acres | Orchard Setup Status | Actions |
|---|---|---|---|---|---|
| California Almond Farms | Block 1 | 2015 | 100.00 | In Progress | Edit / Submit |

## 3. Adding An Orchard

On the Orchards/Facilities page, click the "Add Orchard" button and fill out Profile Information. Click "Save and Add Orchard". The repeat Step 2 for your added orchard(s) until all your orchards have been submitted.

**Answer Assessment Questions**

ORCHARD SETUP    BUSINESS MANAGEMENT    ORCHARD PRACTICES

Block 1    Change Orchard...    Go To My Maps

Total Questions:   ● Show All   ○ Show Unanswered

Orchard Setup    Organization Profile

### Orchard Setup

OS-01  What is the orchard name?

Block 1    ✕

OS-02  In which county is the orchard located?

Yolo ▾    ✕

OS-03  How many almond acres are planted on the orchard?

100    acres    ✕

OS-04  What year was this orchard planted?

2015 ▾

Important Note: Please review your answers prior to submitting. Once you submit you will not be able to change them without contacting Support.

Save    Submit

**TIP:** Double check your orchard info before submitting. Once submitted, each orchard is complete and closed. Future changes will require contacting support.

CALIFORNIA ALMOND STEWARDSHIP PLATFORM ONLINE SYSTEM    Cal

CASP

Assessments ∨    Tools ∨    Reports ∨    Data Share

**Add an Orchard**

Organization:  California Almond Farms

Enterprise:    California Almond Farms

**Profile Information**

Name*:

Block 2

County*:

Yolo ▾

Number of assessed orchard acres*:

100

Year planted:

2015 ▾  (if multiple plantings dates, consider assessing each block separately, or pick a year representing the average age)

(to change Organization or Enterprise name contact help-desk at CASP@sureharvest.com)

Save & Add Orchard

# Assessment

## 1. Locating the Assessment

To complete or update your assessments, select "Assessments" from the Home Dashboard. To begin working on your assessments, click on an orchard by clicking on the arrows on the left and right. You can also click "Pick up where I left off" on the left to return to an assessment that you worked on previously.



## 2. Completing the Assessment

Answer questions by clicking the relevant answer or by typing your answer in the provided box. To remove or clear an answer, select the "x". Answering "No" to some questions will have you skip others. Skipped questions will appear in gray, and you will be unable to answer them.

You will have to manually save each assessment. The system does not automatically save your work. Save is located at the bottom of the scroll area.
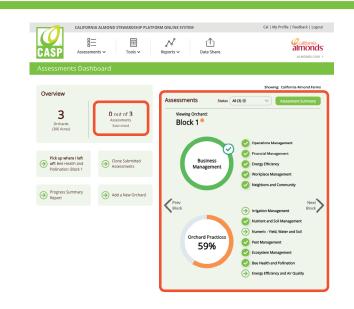
Use the assessment overview at the top of the page to track your progress. Sections with green check marks have been completed. As shown, sections do not need to be completed in order.



**TIP:** Save your progress every time you leave the page or switch to a different assessment.
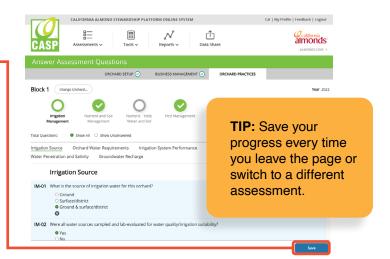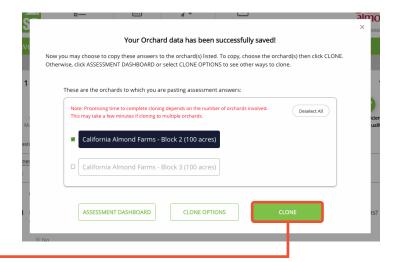
## 3. Submitting & Auto-Cloning the Assessment

Once you have completed all the Business Management and Orchard Practices assessment questions for one of your orchards, click the "Review & Submit" button that should appear. You will then be directed to a Performance Report for your orchard. Click "Submit" once you have confirmed that all the assessment information has been entered correctly. Once you submit your answers you will not be able to change them for this crop year.

If you have completed the set up for one or more additional orchards but have not begun to answer assessment questions for them, you will see a pop-up offering to auto-clone your data. If you have another orchard for which your assessment answers will be very similar, you can select to have the data from your submitted assessment copied to this orchard. Select the boxes next to the orchards you want to auto-clone data for and click "Clone".

Then return to the Assessment Dashboard to review your answers, make any edits needed, and submit. Please note during your review that numeric answers (such as yield) will not be cloned and need to be entered for each orchard.

## STEP 4 — Home Dashboard

Meet your Home Dashboard! Here are a few highlights to take note of on the CASP platform.

### 1. Assessment Overview

This gives you a snapshot of your assessment progress for all your orchards. This can also be seen on the Assessments Dashboard.

### 2. Grower Data Sharing

This allows you to manage and share aggregated assessment data with your handler so they can see what sustainable practices their growers are using.

CALIFORNIA ALMOND STEWARDSHIP PLATFORM ONLINE SYSTEM

Cal | My Profile | Feedback | Logout

Tools to help you maximize your almond yield sustainably. Learn about the benefits of CASP

COMMITMENT TO DATA SECURITY AND PRIVACY

**Assessments**
Complete, review or clone an assessment of orchard practices.
- Pick up where I left off: Numeric - Yield, Water and Soil
- Orchard Setup Summary
- Go to Assessments Dashboard
- Clone an assessment
- Learn about Assessments

**Tools**
Use these tools to improve farming practices.
- Calculate my nitrogen recommendations
- Calculate my irrigation recommendations
- Compare my orchards to the 2025 goals
- Create an irrigation and Nitrogen Management Plan worksheet
- Learn about all the tools

**Reports**
Display your assessment progress and run compliance reporting.
- Run the Assessment Progress Summary Report
- Run the Bee Friendly Farming Eligibility Report
- Run compliance reports for Irrigation and Nitrogen Management Plans (INMP)
- Learn about all the reports

**Assessment Overview**
3 Orchards (300 Acres) | 2 out of 3 Assessments Submitted | Orchard Setup

**Grower Data Sharing**
Securely and anonymously share self-assessment results with your handler(s). This is a strictly voluntary option. Share or stop sharing orchard data at any time.
2 out of 3 Orchards Shared | Manage Data Sharing

## STEP 5 — Cloning the Assessment

Rather than filling an assessment out for each orchard or year, you can clone your assessments, if your orchards in question tend to be treated the same. Click "Clone an assessment" on the dashboard or click on Clone Assessments by hovering over "Assessments" on the menu item.

When cloning your assessments, you can either choose clone from an orchard of your choice to other orchard(s) and assessment modules(s) OR copy the results from last year to the current year with each orchard copied from the data from the year selected. You will be prompted to choose between the two options:

Assessments ⌄
- Assessments Dashboard
- Orchard Setup Summary
- Clone Assessments
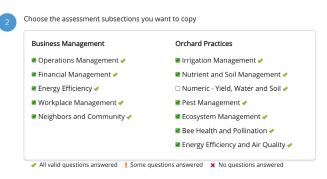- Map Center
- Education Text

**Option 1:** This option is best used to clone one block to others, within the same crop year.

**Step 1:** Use the drop-down menu to choose the organization, which orchard and crop year you would like to clone.

1. Choose the *SOURCE* crop year, organization, and orchard that you want to clone (this is the orchard from which you are copying assessment answers)

Organization: California Almond Farms
Orchard: Block 1 (100) acres
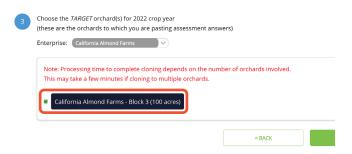Crop year: 2022

**Step 2:** Choose which assessment module(s) you want to clone. All of the modules you have completed will be automatically checked. Uncheck the boxes of any modules you would like to customize for this orchard.
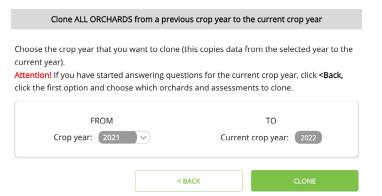
NOTE: Numeric data should not be cloned as that data changes on an annual basis.

2. Choose the assessment subsections you want to copy

**Business Management**
- ☑ Operations Management ✔
- ☑ Financial Management ✔
- ☑ Energy Efficiency ✔
- ☑ Workplace Management ✔
- ☑ Neighbors and Community ✔

**Orchard Practices**
- ☑ Irrigation Management ✔
- ☑ Nutrient and Soil Management ✔
- ☐ Numeric - Yield, Water and Soil ✔
- ☑ Pest Management ✔
- ☑ Ecosystem Management ✔
- ☑ Bee Health and Pollination ✔
- ☑ Energy Efficiency and Air Quality ✔

✔ All valid questions answered   ❗ Some questions answered   ✖ No questions answered

**Cloning Options**
(You will have the ability to edit individual assessments after cloning.)

Option 1: Choose which orchards and assessments to clone. This option copies data from the selected orchard to other(s).

Option 2: Clone assessments for all orchards from the past to the current crop year. Use this option if you have not started answering assessments for the current year. **NOTE: This option overwrites the current crop year with historic data.**

**Step 3:** Select the orchard(s) you would like the cloned assessment data to be copied into. Click "clone", a dialog box explains that orchards selected in step 3 will have the new data based on step 1. Click "confirm" to complete the clone.



③ Choose the *TARGET* orchard(s) for 2022 crop year
(these are the orchards to which you are pasting assessment answers)

Enterprise: California Almond Farms ▾

Note: Processing time to complete cloning depends on the number of orchards involved. This may take a few minutes if cloning to multiple orchards.

☑ California Almond Farms - Block 3 (100 acres)

< BACK

**Option 2:** This option is best used for returning users who are re-assessing their orchard(s) from a previous year to the current year.

Clone ALL ORCHARDS from a previous crop year to the current crop year

Choose the crop year that you want to clone (this copies data from the selected year to the current year).

**Attention!** If you have started answering questions for the current crop year, click **<Back,** click the first option and choose which orchards and assessments to clone.

| FROM | TO |
|------|-----|
| Crop year: 2021 ▾ | Current crop year: 2022 |

< BACK         CLONE

---

*STEP*
**6**

# Customer Service

## 1. Getting Help

If you run into any issues which you cannot find answers to yourself, scroll to the bottom right-hand side of any page, and click "Help."

HOME

EVENTS

BENEFITS OF CASP

CONTACT US

HELP

### Help

#### User Guides
- Getting Started Guide
- N Calculator User Guide
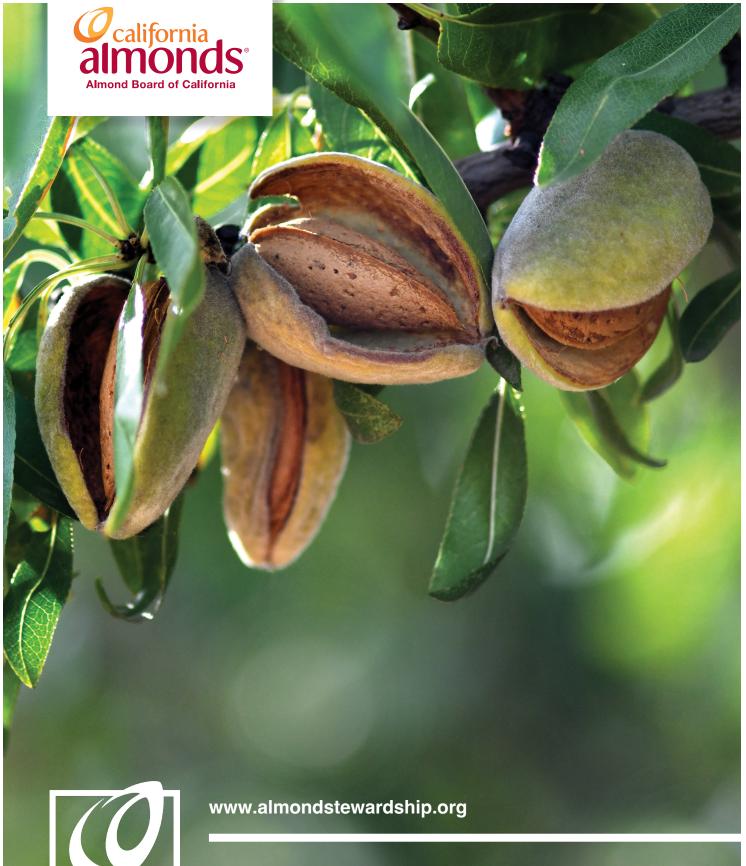- Irrigation Calculator User Guide
- INMP Tool User Guide
- Map Guide

#### Education Text
#### Tours
- Education Text Tour
- N Calculator Tour
- Irrigation Calculator Tour

#### Feedback
- 💬 Start a Conversation with Support

## 2. Help Landing Page

This will take you to the Help landing page, which includes multiple user guides and helpful documents.

An especially helpful resource is "Start a Conversation with Support." Select this link to receive helpful feedback quickly.

**TIP:** Start a conversation with support at any time by clicking on the blue chat icon at the bottom right of your screen.

**www.almondstewardship.org**

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