Instructions for Conducting Endangered Species Act Project Reviews Using IPaC

U.S. Fish and Wildlife Service
Pacific Southwest Region
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Under section 7 of the Endangered Species Act of 1973 (ESA), a federal agency or its designated representative must determine whether their proposed projects may affect threatened and endangered species or designated critical habitat.

The U.S. Fish and Wildlife Service (USFWS) developed the online Information for Planning and Consultation (IPaC) tool to help streamline the ESA review process. IPaC can assist users through the section 7 consultation process when a federal agency authorizes, funds, permits, or carries out an action. Other project proponents without a federal nexus may also use IPaC to review proposed projects for potential impacts to federally listed threatened and endangered species. The following instructions outline the process for how to use IPaC to obtain an official species list, evaluate projects using available assisted determination keys to help make determinations on effects to listed species, and utilize the consultation package builder to develop a biological assessment.

This guide is intended to help federal action agencies or their designated representatives, project proponents, and consultants complete project reviews under the ESA and obtain official documentation to ensure that their proposed projects is in compliance with the ESA. These instructions were developed by the USFWS Pacific Southwest Region for projects located in California, Nevada, and the Klamath Basin, and may not be applicable to other states.

Before entering a project into IPaC, it is important to define the action and action area of your project and be able to adequately describe all project activities. The action area includes all areas to be affected directly or indirectly by the action (i.e., all areas affected by what you are doing, whether it is a project, activity, program, permitting, leasing, granting, etc.) and not merely the immediate area involved in the action. For example, for a culvert replacement that will change water-level elevations, the action area not only includes the areas where the culvert replacement will occur, but also the areas where water-levels will change. When describing project activities, it is important that the USFWS understands the project in terms of what it might mean for wildlife and aquatic resources. For example, in plain, non-technical terms, describe what the project involves. How far will construction vehicles be driving off paved roads? How many trees or how much vegetation is being removed? When will work begin and end? Are there staging areas? What measures are being implemented to reduce potential wildlife and aquatic habitat impacts?

With this information, the IPaC tool can be used to assess your project's impacts to listed species. The IPaC beta version (https://ipacb.ecosphere.fws.gov) should be used to become familiar with and explore the online tool. Since the beta version is for testing only, projects entered into IPaC beta do not create official records. To create official records, projects will need to be entered into IPaC production following the steps below.

Step 1: Enter your project into IPaC

1. Go to the IPaC homepage (https://ipac.ecosphere.fws.gov/) and click "Log In," then either log in to an existing account or create a new Login.gov account.
2. Click "Get Started."
3. Enter the project action area by uploading a shapefile or drawing the action area on the map. You can zoom to find the project location, or enter GPS coordinates or an address in the search bar on the left.
   - You can choose to add layers to the map, such as Critical Habitat, county boundaries, etc., by clicking the "Add" button in the lower left-hand corner of the screen. To the right of the Add Layers button, you can also change from Street view to Satellite or Topo views.
4. When finished, click "Continue" on the left-hand side.
5. Review the list of endangered and threatened species and critical habitats in your area.
   - If any Species Guideline documents are available, such as survey guidelines, habitat assessment guidelines, or general project design guidelines, a "Species Guidelines" dropdown button will be located at the top right corner of the species list.
   - You can view other resources in the project area using the tabs on the left-hand side.
6. Click "Define Project" on the left-hand side.
7. Enter Project Name (up to 100 characters). Suggested format consists of action agency acronym, project name, project code or application/permit number (e.g., Corps of Engineers permit number, Caltrans number), project proponent, and county name.
   - Example 1: BLM Bakersfield Tall Tower Project, TTP7G, Green Tree Consulting, Acme Development Company, Kern County
   - Example 2: USACE Acme Wetland Fill Project, PN 2022-01002, Alameda and Santa Clara counties
8. Enter a detailed project description including a summary of the proposed action and the location, size, scope, and timing of the project. If the project was previously assigned a TAILS number by USFWS in the past, please include that as well.
9. Click "Save." Your project name and map should now appear on your project home page.
10. To allow other partners/colleagues to view and edit your project, click the "1 Member" button below the map. Enter their email address and click "Add Member".

- IMPORTANT: Please be sure to add anyone who needs access to the project page or official species list to prevent the creation of duplicate projects in IPaC.

11. Click on the "Document" button to the right of the member button. This is where all IPaC generated documents, including the project location shapefiles, official species list, and any available Species Guideline documents, will be located and available for download. You may also upload additional project documents that may assist in our review.

12. Click "Project Home" at the top of the page.

13. Click "Start Review" on the right-hand side.

14. On the Step-by-Step Consultation process page, click "Continue," and then click "Yes, request a species list."

15. Next you will be prompted to answer a series of questions related to the project such as if there is a federal nexus, what (if any) special project authorities apply, who the lead federal agency is, your role in the project, etc., and also your contact info and the lead agency contact info (optional). Finally, select the project type and click "Submit Official Species List Request."

    - Your official species list will be automatically generated and available shortly on your project's Documents page for viewing and downloading. A copy will also be sent to the e-mail address associated with your IPaC account. Your project's official species list is valid for 90 days.
        i. To update an official species list in IPaC, go to the My Project page, find the project, expand the row, and click Project Home. In the What's Next box on the right-hand side, click "Request Updated List," and on the next page click "Request Updated Species List." Update any information as needed, then click "Submit Official Species List Request." Please do not create a separate Project in IPaC to receive an updated official species list.

Video Resources
- Requesting an official species list: https://www.youtube.com/watch?v=ylgS_UeNws4
- IPaC Extended Overview: https://www.youtube.com/watch?v=8WAbubFKyFY

Step 2. Analyze project impacts

1. Continuing from the project home page, click "Resume Review" on the right-hand side.

2. If any DKeys are available for you to evaluate, they will be listed here (if not, IPaC will automatically advance you to the next step).

3. To see if your project qualifies to use a relevant DKey, click "Evaluate" under that DKey.

    - Otherwise, click "Skip / Does Not Apply" for individual DKeys, or click "Skip All Determination Keys" at the bottom, and then click "Next Step: Analyze Project." Then skip to step 7 below.

4. If you have chosen to evaluate whether your project qualifies, review the information provided about the DKey.
   - Click the hyperlinked text "detailed overview" at the bottom of the page for the full DKey description, geographic extent, and potential questions in the key.
5. Click "Check if my project qualifies," then answer the questions about your project.
   - You can change your answer on any previously answered question by clicking "Change Answer."
   - You can save your place and continue your evaluation at a later time by clicking "Save for Later" at the bottom of the page.
6. If you reach a preliminary determination, click "Save and Continue". Then follow the prompts to provide additional information and/or generate letters.
   - Otherwise, if you are unable to proceed with the DKey, click "Continue Review," and continue to step 7.
7. At this point you can make an effects determination on your own for any species not covered under a DKey or use the Consultation Package Builder (CPB), which guides users through the process of building a biological assessment. Continue to step 8 for CPB instructions.
8. To utilize the Consultation Package Builder:
   - Click "Resume Review" on the right-hand side of the project home page.
   - Click "Analyze project (optional)" or "Resume Project Analysis" in step 3 of the Endangered species box. Then answer the questions about your project.
   - Click "Enter Consultation Package Builder" at the bottom of the page.
   - Click "Enter Consultation Package Builder" in the pop-up window.
   - Follow the prompts in the main window or use the Workflow navigation pane on the left side to enter all available information.
   - After entering all applicable information, including uploading any supporting documenting, you'll notice the next step will be to complete the CPB. Click "Next Recommended Step."
   - In the Effects analysis complete box, click "Generate PDF and Return to ESA Review."
   - Once the pdf has been generated it can be downloaded and submitted to the appropriate Ecological Services Field Office.
9. For additional assistance you may use the Pacific Southwest Region's [Section 7 Technical Assistance](#) webpage which will help you make an effects determination.

Video Resources
- Using a Determination Key: https://www.youtube.com/watch?v=QkamFZK8EfU
- Using Consultation Package Builder: https://www.youtube.com/watch?v=sKdUZR7zuJs

Step 3. Submit project to USFWS (if needed)

- If your completed analysis indicates a "no effect" determination for all listed species, document your findings in your files to record your compliance with the ESA. As a reminder, consultation is not required and no concurrence from the USFWS is provided if you make a "no effect" determination.
- All other projects should be submitted to the appropriate Ecological Services Field Office (see contact information below). In your email be sure to include the IPaC project code (in the subject line) and all available information used to analyze your project. Reference the Pacific Southwest Region's Section 7 Technical Assistance webpage for additional guidance on information required for consultation.

Step 4. For questions or additional coordination

- Please email the appropriate Ecological Services Field Office or the biologist assigned to the project.
- **It is very important to include the IPaC Project Code in the email subject line and a copy of your IPaC official species list with your email to facilitate our review.**

Pacific Southwest Region Contact Information

Arcata Fish and Wildlife Office email: fw8_afwo_comments@fws.gov

Carlsbad and Palm Springs Fish and Wildlife Offices

Klamath Falls Fish and Wildlife Office

Reno Fish and Wildlife Office email: RFWOmail@fws.gov

Sacramento Fish and Wildlife Office email: SFWO_mail@fws.gov

San Francisco Bay-Delta Fish and Wildlife Office email: fw8_bdfwo_section7@fws.gov

Southern Nevada Fish and Wildlife Office

Ventura Fish and Wildlife Office email: fw8venturasection7@fws.gov

Yreka Fish and Wildlife Office email: yreka@fws.gov