

User Guidance –submitting a project through the Western Bat PBO SharePoint site

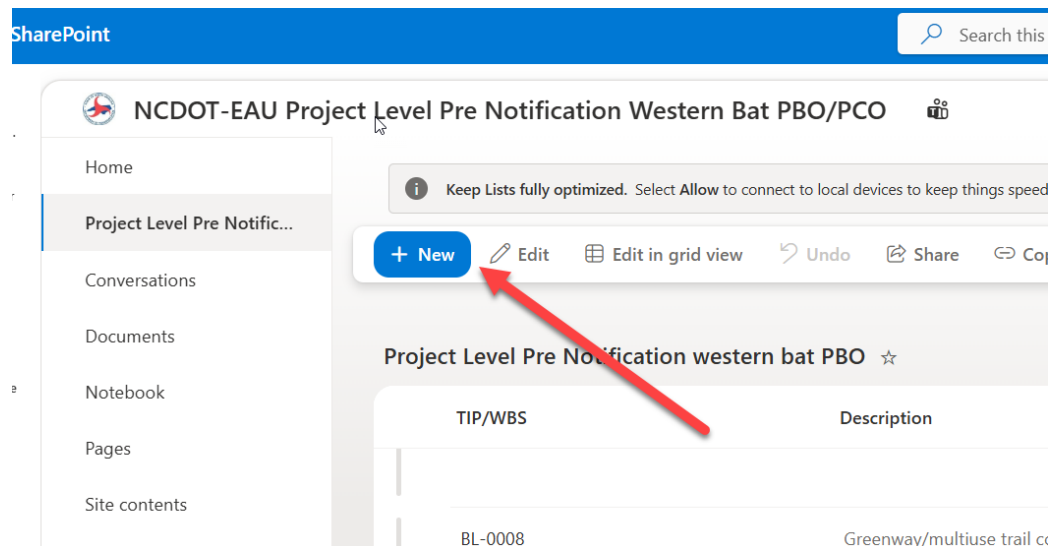
ECAP, Division Environmental Staff (NCDOT Environmental Project Manager), or their contractor will enter the project information into the SharePoint site. You must be a member of this group to submit entries for USFWS review. Contact Cheryl Knepp to be added as a member clknepp@ncdot.gov.

Before you begin to enter projects into the SharePoint site, the Environmental Project Manager creates a project in [IPaC](#) including project boundary and make the following people members: clknepp@ncdot.gov, cdmanley@ncdot.gov, mrmliller2@ncdot.gov, trfox2@ncdot.gov, holland_youngman@fws.gov, mark_endries@fws.gov. The 'Action Agency' is the agency that is requesting the action...NCDOT for example. USFWS is a regulatory review agency.

The following instructions guide you through submitting a project through the Western Bat PBO SharePoint site, link here:

<https://ncconnect.sharepoint.com/sites/EAUProjectLevelPreNotificationWesternBat/Lists/Project%20Level%20Pre%20Notification%20western%20bat%20PBO/AllItems.aspx?viewid=2e2341e5%2Df370%2D40b3%2Db6f0%2Dc9a30059ecd4>

Click on the '+ New' button in the upper left to get started



After you click '+ New', a dialog box will appear with individual fields for you to fill in. Within the dialog box, we have inserted 'helper text' under each field to provide extra guidance and descriptions so we all enter information consistently to expedite USFWS review.

The screenshots below show the fields, and further details are provided about what to input for each field. **If the field name is orange color below, that indicates you do not need to fill it in right now.**

TIP/WBS
NJ-4700

Description *
Enter value here
include project timeline, what is happening, any structure description (e.g., culvert/bridge structure number, material type, culvert dimension)

Latitude/Longitude (Decimal Degrees) *
35.872072, -81.501057 to 35.716605, -81.356069

County *
Catawba, Burke, Caldwell

Division *
11 12

Lead Federal Agency *
FHWA
You can utilize the Western bat PBO/PCO as long as there is a federal nexus (i.e. FHWA is providing federal funding, NCDOT will be applying for a federal permit, or if it is state funded NCDOT project, with USACE in the lead federal role). LAPs can also utilize the Western bat PBO/PCO as long as at least one of the three criteria below are met: • FHWA is providing funding (through NCDOT) • NCDOT is the permittee • State funded projects, with USACE in the lead federal role

Submitter *
Erin Cheely

TIP/WBS – enter the project number, if it is a contract number, it will need to remain consistent throughout the life of the project for the PBO purposes as we will refer back to it at reporting time.

Description – include the project timeline, what is happening and any structure description like if it is a culvert or bridge then include the 6-digit structure number, the material type, dimensions of culvert. If there was a previous consultation completed, explain why reinitiation is occurring and provide the Service Log No. Some examples of project descriptions are pasted below.

- Replace Bridge 490068 over Savannah Creek on SR 1300 (Pumpkintown Rd) with concrete cored-slab. Previously received a NLAA determination through prior coordination with USFWS (Service Log 24-152) with tree clearing moratorium April 1 - Oct 15. However, we prefer to consult using PBO to allow a wider window for utility relocation/project clearing.
- Widen and pave the 1.0 mile Upper Crab Orchard Road, SR 1122, from its beginning at Rominger Rd. to the dead end. The project will start in November 2025. There will be no bridge/structure work.
- Replace bridge 330289 on SR 4000 (University Parkway) over US 52. Installation of 48" overflow pipe adjacent to existing 48" CMP (existing remains). Backfill of a pipe with 66" RCP replacement installed adjacent. Replacement of 42" CMP with 60" RCP. The proposed replacement structure will be a two-span bridge approximately 264 feet long. Anticipated Let: 05/19/2026.
- Improve Kensington Drive for approximately 0.5 miles from NC 16 (Providence Road) to Connells Point Ave. This project will replace the existing on-street parking with vehicle turn lanes on both sides of Kensington Drive and will also include variable width sidewalks along the project corridor. Construction LET spring/summer 2026.

Latitude/Longitude – enter the location of the project in Decimal Degrees. If it is a linear project, include start and an end location coordinates.

County – if multiple counties, enter all of them

Division – if multiple NCDOT Divisions, enter all of them

Lead Federal Agency – FHWA or USACE for example. Projects that qualify for use include FHWA funded projects or state funded projects with USACE in the lead federal role or if NCDOT is the permittee. If another agency is the lead (TVA for example), which is not a signatory on the PBO (USACE/FHWA), they must provide a written letter delegating NCDOT/FHWA authority to consult with USFWS on their behalf.

Submitter – the NCDOT Environmental Project Manager, if you are entering on behalf of someone else, enter the NCDOT staff member that will be consulting on the project with USFWS.

 **Date Submitted to USFWS**

Enter a date

This will be entered by the approver when review is complete

 **Date USFWS Review Complete**

Enter a date

This will be entered by USFWS when review is complete

 **USFWS Service Log Number**

Enter value here

This will be entered by USFWS when review is complete. Or, if a previous consultation was completed for this project, provide the log number here.

☒ **USFWS Zone Type (hibernation range or year round range) ***

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The hibernation zone vs year round zone map can be found here at the link below (the hibernation zone is west of the year round zone and unshaded in this map):
<https://experience.arcgis.com/experience/9e4a7e7ce83448679714a313810f9fce>

☒ **Within designated Protective Buffer? ***

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review BSG map service online

 **Designated Protective Buffer Explanation**

Enter value here

Date Submitted to USFWS – this will be entered by the approver when review is complete, and it is submitted to USFWS for their review.

Date USFWS Review Complete - USFWS will enter this date when their review is completed, they will also still issue a letter acknowledging each project qualifies for PBO use.

USFWS Log Number – if this project already went through consultation, enter the previous USFWS Service Log number assigned to the project. If this is a new consultation, after USFWS reviews the project, they will enter the Service Log number here.

USFWS Zone Type – enter if the project falls within year-round or hibernation range. *Viewable map of the year-round ranges (the hibernation zone is west of the year round zone and unshaded in this map):* <https://experience.arcgis.com/experience/9e4a7e7ce83448679714a313810f9fce>

Within Designated Protective Buffer – until the map is approved, leave this blank and BSG will fill this in.

Designated Protective Buffer Explanation – list the species that the buffer represents, until the map is approved, leave this blank and BSG will fill this in.

IPaC generated species list *

bat species covered by this PBO (Va big eared bat is not covered in this PBO)

IPaC date generated *

Will the project have effects to other listed species that requires consultation that will be addressed separately (list spp)? *

Can all applicable CMs in PBO be adhered to? *

If they cannot, the project is not eligible for PBO use. See PBO User Key link below on BSG website, (you may ignore 'buffer' CMs if you are not within a Protective Buffer area)
[https://connect.ncdot.gov/resources/Environmental/EAU/BSG/Documents/Bats/Bat%20Programmatic%20\(Div%209-14\)/WNC%20Bats%20PBO%20User%20Key.pdf](https://connect.ncdot.gov/resources/Environmental/EAU/BSG/Documents/Bats/Bat%20Programmatic%20(Div%209-14)/WNC%20Bats%20PBO%20User%20Key.pdf)

Structure Survey Dates

structure surveys must be completed within 2 years of project let; culvert surveys are not necessary in the year round range. Please send all completed survey forms to BSG so we can enter them in the database here (we enter them annually in winter). If multiple surveys, enter all dates. If no survey necessary, enter NA - no survey necessary. The survey map can be found on the BSG Connect site here: <https://ncdot.maps.arcgis.com/apps/instant/sidebar/index.html?appid=1e3211f382f34406a9077495ebb2719f>

Structure Survey Results

IPaC Generated species list – list the bat species that this PBO will cover (Hint: the PBO does not provide consultation coverage for Virginia big eared bat).

IPaC date generated – date you created the project in IPaC

Will the project have effects to other listed species requiring separate consultation? – list the species that your project will have a biological conculsion of LAA or NLAA so USFWS knows to expect consultation for those species under separate cover.

Can all applicable CMs in PBO be adhered to? – all CMs must be adhered to for the project to be eligible for PBO use. Review all the CMs at the link below (you may ignore 'buffer' CMs if you are not within a Protective Buffer area).

[https://connect.ncdot.gov/resources/Environmental/EAU/BSG/Pages/default.aspx#:~:text=Bat%20Programmatic%20Biological%20Opinions%20\(Western%20Divisions%209%2D14\)](https://connect.ncdot.gov/resources/Environmental/EAU/BSG/Pages/default.aspx#:~:text=Bat%20Programmatic%20Biological%20Opinions%20(Western%20Divisions%209%2D14))

Structure Survey Dates - structure surveys must be completed within 2 years of project let; no surveys are necessary on timber bridges; culvert surveys are not necessary in the year-round range. Please send all completed survey forms to BSG so we can enter them in the central database (we enter them annually in winter, link below). If there are multiple surveys, enter all dates. If no survey necessary, enter NA - no survey necessary. The survey map can be found on the BSG Connect site here:

<https://ncdot.maps.arcgis.com/apps/instant/sidebar/index.html?appid=1e3211f382f34406a9077495ebb2719f>

Structure Survey Results – explain if the survey was for a bridge, culvert, both. Include structure description, findings. Example: no evidence of bats observed on concrete deck bridge (Hint: culvert surveys not necessary in year-round range).

☑ Structure Survey Results: Evidence of Bats?

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☑ Effect Determination

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From see Table 5 pg 33 of PBO. Activities determined to adversely affect one or more of the covered species include tree removal, collision, and alteration or loss of roosting structure. If any activity is likely to adversely affect a covered species, the entire project is considered likely to adversely affect a covered species. Just select one of these activities to represent the project. *Projects clearing trees within highly developed urbanized areas are considered unlikely to adversely affect covered bats, regardless of time-of-year.

≡ Notes on Determination & Biological Rationale

Enter value here

if further explanation is needed for Effect Determination (i.e. Tree clearing is occurring during sensitive season but only gray bat is listed - NLAA)

📄 Estimated Tree Clearing (acres)

Enter value here

📄 Actual Tree Clearing (acres)

Enter value here

ONLY ENTER WHEN PROJECT IS COMPLETED

⚙ Estimated Tree Clearing Season/Ratio *

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Select a work season, if unknown, assume worst case non-volant pup season for your zone. Associated ratios are included at the end of each choice for your convenience.

Structure Survey Results: Evidence of Bats? – was there evidence of bat use? Yes/No/NA

Effect Determination – you will select from a list of choices from Table 5 of the PBO (pg. 33).

Activities determined to adversely affect one or more of the covered species include tree removal, collision, and alteration or loss of roosting structure. If any activity is likely to adversely affect a covered species, the entire project is considered likely to adversely affect a covered species. Just select one of these activities to represent the project. *Projects clearing trees within highly developed urbanized areas are considered unlikely to adversely affect covered bats, regardless of time-of-year.

Notes on Determination & Biological Rationale – enter any further explanation of how you determined Effect Determination, if necessary. For example, tree clearing is occurring during a sensitive season, but only gray bat is listed, and it is not a tree roosting species – NLAA.

Estimated Tree Clearing – provide estimated clearing in acres. A baseline acreage of tree removal can be calculated using the clearing boundaries specified in the project plans or using an aerial map with the measure tool - measure the length and width of the area to be cleared and that will give you ft², then divide that by 43,560 ft² to give you acres.

Actual Tree Clearing – provide actual clearing in acres. ‘Actual’ fields are only entered when the project is completed

Estimated Tree Clearing Season/Ratio – you will select from a dropdown of choices (below), if your tree clearing season is unknown, assume the worst case non-volant pup season for your particular zone. Associated ratios for calculations are included at the end of each choice for your convenience. [Hint: only applicable if project falls within a protective buffer or if clearing will occur during pup season; then applicable everywhere (2:1)].

⚙ Estimated Tree Clearing Season/Ratio *

Type to filter

Select a work season, if unknown, assume worst case non-volant pup season for your zone. Associated ratios are included at the end of each choice for your convenience.

Hibernation: April 1 – May 15 (spring staging and/or summer occupancy before non-volant pup season) 1.5:1 - buffers

Hibernation: May 15 – July 31 (non-volant pup season) 2:1

Hibernation: August 1 – November 15 (end of summer occupancy through fall swarming) 1.5:1 - buffers

Hibernation: November 15 – March 31 (outside sensitive seasons) No Payment

Year Round: April 1 – April 30 (summer occupancy before non-volant pup season) 1.5:1 - buffers

Year Round: May 1 – July 15 (non-volant pup season) 2:1

Year Round: July 16 – December 14 (outside sensitive seasons) No Payment

Year Round: December 15 – February 15 (winter torpor season) 1.5:1 - buffers

Year Round: February 16 – March 31 (outside sensitive seasons) No Payment

Unknown: assuming non-volant pup season worst case 2:1

NA: gray bat only

NA: no tree clearing

Actual Tree Clearing Season

Enter value here

ONLY ENTER WHEN PROJECT IS COMPLETED. Please enter a date range of when tree clearing actually occurred. Ex. November 2025 - January 2026. If it spans multiple seasons, we will use the worst-case season for the calculation.

Actual Tree Clearing Payment Ratio

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Hint: only if within protective buffer or if clearing during pup season then applicable everywhere (2:1). N/A if only gray bat is listed (not a tree roosting species)

Estimated Structures Impacted

Enter value here

Enter number of structures impacted. This only applies to structures that would be considered bat habitat, so do not include timber bridges in this or culverts <60' long or <3' high.

Actual Structures Impacted

Enter value here

ONLY ENTER WHEN PROJECT IS COMPLETED. Enter number of structures impacted. This only applies to structures that would be considered bat habitat, so do not include timber bridges in this or culverts <60' long or <3' high.

Estimated Structure Work Season/Ratio

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Select a work season. If unknown, and work will occur in a buffer, assume worst case non-volant pup season for your zone. Associated ratios are included at the end of each choice for your convenience.

Actual Structure Work Season

Enter value here

ONLY ENTER WHEN PROJECT IS COMPLETED. Please enter a date range of when structure work actually occurred. Ex. November 2025 - January 2026. If it spans multiple seasons,

Actual Tree Clearing Season – provide a date range of when tree clearing actually occurred (ex: November 2025 – January 2026). If it spans multiple seasons, we will use the worst-case season for the calculation. ‘Actual’ fields are only entered when the project is completed

Actual Tree Clearing Payment Ratio – you will select from a dropdown of choices [Hint: only if within protective buffer or if clearing during pup season then applicable everywhere (2:1). N/A if only gray bat is listed (not a tree roosting species)]. ‘Actual’ fields are only entered when the project is completed.

Estimated Structures Impacted - Enter number of structures impacted. This only applies to structures that would be considered bat habitat, so do not include timber bridges in this or culverts <60' long or <3' high.

Actual Structures Impacted – provide the actual number of structures impacted. ‘Actual’ fields are only entered when the project is completed. This only applies to structures that would be considered bat habitat, so do not include timber bridges in this or culverts <60' long or <3' high.

Estimated Structure Work Season/Ratio - Select a work season and select a payment ratio. If unknown, and work will occur in a buffer, assume worst case season for your zone/species. Associated ratios are included at the end of the list.

Actual Structure Work Season - ‘Actual’ fields are only entered when the project is completed. Please enter a date range of when structure work actually occurred. Ex. November 2025 - January 2026. If it spans multiple seasons, we will use the worst-case season for the calculation.

☰ Actual Structure Work Ratio

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(Hint: only necessary if within protective buffer or if unable to do surveys, then applicable everywhere as 2:1). Select from list below, multiple selections allowable.

📄 Estimated Payment Calculation

Enter value here

Show work: Structure Ex = \$5,750 (USDA Aug 2026; Aug 2025 = \$5,470) x 0.1 ac (0.1 is a constant number, does not change) = 575 x 1.5 (temporary affect multiplier) = \$863 contribution/structure Tree Clearing Ex = \$5,750 (USDA Aug 2026; Aug 2025 = \$5,470) x 15 ac = \$86,250 x 2 (critical life stage multiplier 2:1) = \$172,500 contribution amount

☰ Actual Payment Calculation

Enter value here

ONLY ENTER WHEN PROJECT IS COMPLETED. Show work: Structure Ex = \$5,750 (USDA Aug 2026; Aug 2025 = \$5,470) x 0.1 ac (0.1 is a constant number, does not change) = 575 x 1.5 (temporary affect multiplier) = \$863 contribution/structure Tree Clearing Ex = \$5,750 (USDA Aug 2026; Aug 2025 = \$5,470) x 15 ac = \$86,250 x 2 (critical life stage multiplier 2:1) = \$172,500 contribution amount

💵 Estimated Payment Total

Enter a number

This will be a column tally so only put the estimated figure here, no dollar sign.

💵 Actual Payment Total

Enter a number

ONLY ENTER WHEN PROJECT IS COMPLETED. This will be a column tally so only put the figure here, no dollar sign.

Actual Structure Work Ratio - Select from list, multiple selections allowable (Hint: only necessary if within protective buffer or if unable to do surveys, then applicable everywhere as 2:1).

☰ Actual Structure Work Ratio

Type to filter

ONLY ENTER WHEN PROJECT IS COMPLETED. This will be a column tally so only put the figure here, no dollar sign.

Buffer Area: 1:1 - lack of suitable habitat on new structure

Buffer Area: 2:1 - suitable habitat structure removal during sensitive season

Buffer Area: 2:1 - no survey possible/assumed presence

Buffer Area: 4:1 - suitable habitat structure removal and listed bats are known to be present

Not in Buffer Area: 2:1 - no survey possible due to extenuating circumstance/assumed presence

NA - no qualifying structures

NA - not within buffers

NA - no structure work

NA - work will occur outside of sensitive season for listed species

Estimated Payment Calculation – use this field to show your work:

Example: USDA value for work after Aug 2026 = \$5,750; previous year Aug 2025 = \$5,470)

Structure Example: \$5,750 x 0.1 ac (0.1 is a constant number, does not change) = 575 x 2 (affect multiplier) = \$1,150 contribution/structure

Tree Clearing Example = \$5,750 (USDA Aug 2026; Aug 2025 = \$5,470) x 15 ac = \$86,250 x 2 (critical life stage multiplier 2:1) = \$172,500 contribution amount

Actual Payment Calculation - 'Actual' fields are only entered when the project is completed. Use this field to show your work as described in field above.

Estimated Payment Total – this will be a column tally so only put the figure in here, no dollar sign or it gives an error.

Actual Payment Total – 'Actual' fields are only entered when the project is completed. This will be a column tally so only put the figure in here, no dollar sign or it gives an error.

Email sent – for internal use only, do not enter text in this field.

- After you have saved your entry, BSG will be automatically notified via email that your project is ready for review. BSG reviews buffer information, calculations and effect determinations. If all is correctly entered, the project status will be changed to 'Approved' by BSG and staff will enter the date in the column 'Date Submitted to USFWS'. BSG's role moving forward will be in a support capacity to review calculations and entries but not as the main contact for consultations. Should USFWS have individual project questions, they will contact the person listed under the 'Submitter' column.
- USFWS is notified (via autogenerated email) when a project is approved by BSG and completes their pre-notification review of Western Bat PBO projects. Once this step is complete, USFWS will enter information in the columns: 'USFWS Review Complete' and 'USFWS Service Log Number'. In addition to filling in those two columns, USFWS will also still issue a letter acknowledging each project qualifies for PBO use.
- USFWS will review projects that are pending review on a weekly basis.

****IMPORTANT****

When all project work is completed, all 'Actual' fields will need to be entered with project relevant data: i.e. actual tree clearing acreage, actual tree clearing season, actual number of structures impacted, actual structure work season and payment ratios/calculations. This will complete the reporting requirement for USFWS that is listed in the PBO.