Sustainable Groundwater Management Act Portal Projects and Management Actions Module User Manual



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SGMA Portal Projects and Management Actions Module User Manual

1. User Manual Introduction and Purpose

This User Manual describes the <u>Sustainable Groundwater Management Act (SGMA) Portal's</u> new Projects and Management Actions Module. This User Manual is intended to provide a step-by-step overview of the new SGMA Portal Projects and Management Actions Module (PMA Module).

Per 23 CCR § 354.44, Groundwater Sustainability Plans (GSPs or Plans) are required to include a description of the projects and management actions that the Agency has determined will achieve the sustainability goal for the basin, including projects and management actions to respond to changing conditions in the basin. Additionally, each Groundwater Sustainability Agency (GSA or Agency) is required to annually describe the Agency's progress towards implementing the Plan including implementation of projects and management actions as part of the GSP Annual Reporting Requirements (23 CCR § 356.2(c)).

As part of the evaluation of whether a Plan is likely to achieve the sustainability goal of a basin, the Department of Water Resources (Department) considers whether the projects and management actions are feasible and likely to prevent undesirable results and ensure that the basin is operated within its sustainable yield (23 CCR § 355.4(b)(5)). Additionally, as part of its periodic review, the Department is required to evaluate whether the Agency is implementing its projects and management actions consistent with the Plan, or that the Agency has demonstrated that actions described in the Plan have been rendered unnecessary based on changing basin conditions or an improved understanding of basin conditions (23 CCR § 355.6(c)(2)).

The PMA Module is intended to assist Agencies in satisfying the requirements of the regulations described above by providing an organized and familiar space to track, document, and annually report on progress made toward implementing projects and management actions. while also assisting in the Departments

To view and use the tools discussed in this User Manual, SGMA Portal users (Users) must be logged into an account on the SGMA Portal. New Users can register for a SGMA Portal Account by using the link on the bottom of the <u>SGMA Portal's home page</u> or at the following link: <u>https://sgma.water.ca.gov/portal/account/registration</u>.

For any questions about the Projects and Management Actions Module, please contact <u>GSPSubmittal@water.ca.gov</u>.



2. Projects and Management Actions Module Process Overview

The **Project and Management Actions Module** is a centralized module to view, edit, and submit new projects and/or management actions (PMAs). The projects and management actions that a User can access are dependent on the Agencies that the User is associated with in the SGMA Portal. The goal of the **Projects and Management Actions Module** is to provide a streamlined process for Agencies to report on the progress of implementing their projects and management actions to comply with the GSP Regulations.

The Projects and Management Actions Module consists of the following eight sections:

- Project or Management Action Information (A)
- Location (B)
- Schedule and Implementation (C)
- Costs (D)
- Benefits (E)
- Monitoring (F)
- Additional Documents (G)
- Implementation Updates (H)

Sections A through E are required to be completed when initially submitting a new PMA to the Projects and Management Actions Module. The fields in these sections are based on the requirements for projects and management actions outlined in 23 § CCR 354.4(b). Sections F and G are optional and can be completed after the PMAs are submitted to the module.

Section H is required to be completed on an annual basis as a part of the Agencies' Annual Report submittal. This section is intended to collect data based on the GSP Regulations that state that that GSAs are required to annually submit projects and management actions' progress towards implementing the plan since the previous annual report (23 CCR § 356.2(c)).



3. Adding New Projects and Management Actions

This section outlines the process for adding new PMAs into the Projects and Management Actions Module.

To add new PMAs, the User must be associated with the Lead GSA on the SGMA Portal. For detailed instructions on granting Users permissions to PMAs, see <u>Section 5</u> of this User Manual.

3.1 Completing Sections A through E

Adding a new PMA consists of providing required data for **Sections A through E** of the PMA Module. Once **Sections A through E** are completed and saved within the module, a PMA's status will be considered "Submitted" and can be viewed in the User's "**My Projects/Management Actions**" page.

Sections A through E can be completed for an individual PMA or for multiple PMAs simultaneously. <u>Section 3.1.1</u> describes the process of individually adding a new PMA by filling out and submitting a form within the module. <u>Section 3.1.2</u> describes the process of adding multiple PMAs simultaneously through a Batch Import template.

3.1.1 Adding an Individual Project or Management Action

1. Log in to the SGMA Portal to view the SGMA Portal's home page. Click the "My Projects" icon.



Figure 1. Screenshot of the SGMA Portal Homepage, highlighting the location of the "My Projects" icon.



2. Click the "**New PMA**" button on the top left side of the "**My Projects/Management Actions**" page. The user will be navigated to the "**New Project/Management Action**" page.

	A Home	≣GSA ≣ G	SP 🗏 Alternati	ives 🗏 Adjudi	cated Basins	C Basin Modification	C Monit	oring Network	■ State Interventio	n t ⊐File Tra	nsfer
2	Home / All Proj	jects (Admin)		ŀ	All Proj	ects (Adm	in)				
	+ New PMA	🛎 PMA Import	PMA Export	Eatch Update	Include Del	eted			Search:		
	Filter by GSA *	Filter by GSP	* Filter by Basin	/ Subbasin *							
	PMA ID	Project N	ame 🝦 GSA	¢	Basin / Subbasin	🕴 GSP(s)	÷	Status 🍦	Updated By	Last Updated 👻	Action(s)
	3-004.06_PM	IA_6 C Prefer Project 2: Miguel Re Water De	red San Migu San Services I ccycled livery	el Community District GSA	3-004.06 PASO ROBLES AREA	3-004.06 PASO ROBL AREA	ES	SUBMITTED	Jackson Cook	01/14/2025 17:21:21	:
	3-004.06_PM	A_4 C Manda Pumping Limitation Specific A	tory City of Pa GSA,Shai s in GSA,Cou reas Obispo G Area,San Communi	iso Robles ndon-San Juan nty of San Luis SA - Paso Robles Miguel ity Services District	3-004.06 PASO ROBLES AREA,3- 004.06 PASO ROBLES AREA,3- 004.06 PASO ROBLES AREA,3-	3-004.06 PASO ROBL AREA,3-004.06 PASO ROBLES AREA,3-004 PASO ROBLES AREA 004.06 PASO ROBLE	ES .06 .3- S AREA	SUBMITTED	Jackson Cook	01/14/2025 17:21:21	I

Figure 2. A screenshot highlighting the "New PMA" button.

3. Complete the required fields on the "New Project/Management Action" page, which includes Sections A through E.

4. Sections can be collapsed and expanded using the arrow symbol (">") on the right side of each section's header.

5. Text entry fields can be expanded vertically by clicking and dragging the right corner of any text entry field box.

6. Once all required fields are completed, click "**Submit to DWR**" at the bottom of the page to submit the project or management action. If needed, the user can click "**Save as Draft**" to save progress on the project or management action.



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A Home ≡ GSA ≡ GSP ≡ Atternatives ≡ Adjudicated Basins C I Home / All Projects (Admin) / New Project	Basin Modification C Monitoring Network \equiv State Intervention the Transfer	0									
🖸 New Project / N	Management Action	3									
A Project or Management Action Information	A Project or Management Action Information										
B Location	B Location										
C Schedule and Implementation	C Schedule and Implementation										
D Costs	D Costs										
E Benefits	v	and the second									
 1. Beleot applicable benefitted sustainability indicators:	Select applicable indicators	10-2									
• a. if no sustainability indicators are selected, please provide an explanation.	Enter description here	1 ANKAR									
2. Beleot all applicable benefits.	Select all applicable types										
3. Does the project or management action provide water supply benefits?	3. Does the project or management action provide water supply benefits?										
a. Provide the estimated projected benefits in acre-feet per year (AFY). 🕑	a. Provide the estimated projected benefits in acre-test per year (AFY).										
b. Provide a description of the water supply benefits.	Enter description here										
4. Describe any other non-water supply related benefits. 💿	Enter description here										
• 6. Explain how benefits will be evaluated.	Enter description here	and the second									
8. Is the PMA dependent on a water supply source?	Yec No O										
7. Belect all applicable water source(s). @	Select applicable sources										
8. Explain the water course(c) and the reliability of each course.	Enter description here										
Submit to DWR	Save as Deat										

Figure 3. A screenshot of the "New Project/Management Action" page. Sections A through E are highlighted for Step 3. The arrow symbol to expand and collapse sections and the text entry field corner are highlighted for Step 4. The corner of a text entry field is highlighted for Step 5. The "Submit to DWR" button is highlighted for Step 6.

7. After saving the new PMA, the page will be redirected to the "Edit Project/Management Action" page. This indicates that the PMA has been successfully submitted. The information entered into Sections A through E for the PMA can be viewed by expanding any of the Sections.

8. At this time, **Sections F, G, and H** will become available for this PMA. The User can choose to provide this information immediately or can choose to provide this information at a later time. For instructions about how to provide information to **Sections F, G, and H** at a later time, see <u>Section 4.2</u> and <u>Section 4.3</u> of this User Manual.



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	Rena 1 Mar Pegal 1 Kangada Kangawar Atala É Edit Project / Management Action	7
	A Project or Management Action Information >	
	B Location >	AND A CONTRACTOR OF A DESCRIPTION
	C Schedule and implementation	
the second second	D Costs	
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24 Q		
<u> </u>	See to the 1446 (Context to) Content Weeks (Continue of Use (Phace Public) Control of Content to Continue Leaf Names (SIGDA1)	

Figure 4. A screenshot showing the "Edit Project/Management Action" page. Sections A through E, which can be expanded to show the submitted information, is highlighted for Step 7. Sections F through H are highlighted for Step 8.

9. To view the submitted project or management action, go to the "**My Projects/Management Actions**" page.

		Department of Water Resources					
		≡ GSP ≡ Alternati	es 🕑 Adjudicated Areas	C Basin Modification	C Monitoring Network	13 File Transfer	
	Home / My Projects	My Pro	jects / Mana	agement Ad	ctions	reh:	
	Project Name) GSA) Basin / Subbasin	⊕ G\$P(s) 0	Status () Updated	By Last Updated Action(s)	9
Contraction of the second	C Test Project 1	SGMO Test	5-089 YOSEMITE VALLEY		SUBMITTED SGMA Te	st 04/18/2024 14:24:20	And And I want
	Showing 1 to 1 of 1 entities					Previous 1 Next	

Figure 5. A screenshot of the "My Projects/Management Actions" page highlighting the newly submitted project.



3.1.2 Batch Import Method – Adding New PMAs

1. From the SGMA Portal's home page, click the "My Projects" icon to navigate to the "My Projects/Management Actions" page.



Figure 6. Screenshot of SGMA Portal Homepage, highlighting the location of the "My Projects" icon.

2. Click the "PMA Import" button.

A Home ∃	GSA	∃ GSP	∃ Alternati	ves 🗏 Adjudi	cated Basins	C Basin Modification	C Moni	toring Network	∃ State Interventi	on 117 File Tra	ansfer
		muri)		1	All Proj	ects (Adm	in)				
+ New PMA	≚ РМ	A Import	PMA Export	a Batch Update	Include De	leted			Search:		
Filter by GSA *	Filte	by GSP *	Filter by Basin	/ Subbasin *							
PMA ID	÷	Project Name	e 🝦 GSA	÷	Basin / Subbasin	🖨 GSP(s)	\$	Status 👙	Updated By	Last Updated 🚽	Action(s)
3-004.06_PM	A_6	Di Preferred Project 2: Sar Miguel Recyc Water Deliver	San Migue n Services D cled	el Community District GSA	3-004.06 PASO ROBLES AREA	3-004.06 PASO ROB AREA	LES	SUBMITTED	Jackson Cook	01/14/2025 17:21:21	1
3-004.06_PM	A_4	C Mandatory Pumping Limitations in Specific Areas	City of Pas GSA,Shar GSA,Cour SObispo GS	so Robles adon-San Juan aty of San Luis SA - Paso Robles	3-004.06 PASO ROBLES AREA, 3- 004.06 PASO ROBLES AREA, 3-	3-004.06 PASO ROB AREA,3-004.06 PASO ROBLES AREA,3-00- PASO ROBLES AREA	LES) 1.06 4,3-	SUBMITTED	Jackson Cook	01/14/2025 17:21:21	:

Figure 7. Screenshot of the My Projects/Management Actions page, highlighting the location of the "PMA Import" button.



3. Click the "**Download Excel Template**" button to download the batch import spreadsheet template (.xlsm format).

	C.co	Department o	f Water Resour	ces		Welcome, SGMA O Sign Out O E	Test 04/19/2024 Sestback I & My Profile		
	🔒 Home	≡ GSA ≡ GSP		C Adjudicated Areas	C Basin Modification	C Monitoring Network	123 File Transfer		
	Home / My Projects / Im	rort							
mader enderfeteren etterten bestere freitere erste besteren		P	roject or	Managen	nent Action	Import		Dies	-
	Instructions Follow the instructions be Management Actions mo	ow to import the Pro- tule.	2 vent Act	tion Excel template. This	process will import new pro	jects and/or management a	ctions to the Projects and		
	Step 1. Download th	e import Project or ad Excel Template	Exot	el template.				Contraction of the second second	
	Step 2. Populate the	import Project or Mana	igement Action Excel	template with all required	I information (instruction ta	b available in the template).			and and
	Step 3. Upload the	opulated import Project	t or Management Acti	ion Excel template and cl	ck on "Import Data" to star	t the import process.		and the second se	
				Ci dr	ck to upload OR ng files here				
11 M	2 Import	Data							
Constant.									

Figure 8. Screenshot of the "Project or Management Action Import" page, highlighting the location of the "Download Excel Template" button.

4. Open the Batch Import spreadsheet template. Macros must be enabled for certain fields of the spreadsheet to work correctly. These macros are used for certain fields in the module where multiple selections are allowed (i.e., Lead GSA(s), Project Type, Potential Funding Sources). For instructions about enabling macros, please see <u>Section 3.1.3</u> of this User Manual.

5. Fill out the Batch Import template starting at cell **A2** on the "**Batch Import Spreadsheet**" tab so that each row correlates to a respective project. Each column correlates to the fields in **Sections A through E**.

Although some fields are locked for editing, you can copy and paste fields within the spreadsheet; however, you may get an error if you try to paste an entire row. If this happens, select only the cell(s) that you want to copy and paste.

A	В	C	D	E	F	G	H
A.1. ct or Management Action?	t - nent Action Name	A.3 - Subcategory	A.4 -Brief Description	A.S - Project or Management Action Type(s)	A.5(a) - Type - Other Description	A.6 - Lead Implementing GSA(s)	A.7 - Other Implems
Project or Management / Choose whether this is a p management action from down menu.	iction a night of a line of the drop-						
		0.97					
Read Me Batch	Import Spreadsheet	Field Description	() (F)	1.0			

Figure 9. Screenshot of the Batch Import Spreadsheet. The spreadsheet is highlighted for Step 4. Cell A2 is highlighted for Step 5.



6. When clicking into a cell, a popup box with a brief description of the respective field will appear.

A	2 - 1	× - √ - fe						¥		
3	A	в	С	D	E	F	G			
1	A.1 - Project or Management Action?	A.1 - A.2 - Project or Management Action Name		A.2 - A.3 - Subcategory		A.4 - Brief Description	A.5 - Project or Management Action Type(s)	A.5(a) - Type - Other Description	A.6 - Lead Implementing GSA(s)	
2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27	Project or Choose w manager down me	Management Action hether this is a project or a ent action from the drop- nu.								
-	Batch	Import Spreadsheet Field Des	scriptions (+)					•		
	Ready 🐻 🏌	Accessibility: Good to go				G Display Settings]+ 70	66		

Figure 10. Screenshot of the Batch Import Template. A popup box with a brief description of the respective field is highlighted.

7. More detailed information about each field is on the "**Field Descriptions**" tab. This tab provides a description of each field and indicates whether the field is required. The user will also see a "**Read Me**" tab in the spreadsheet, this tab provides general instructions and descriptions on how to use the spreadsheet.

A2	Ψ.	: 🗙 🗸 🏂 A1			Ý				
- 4	A	8	c	D					
1	Field ID	Field	Description	Mandatory?					
2	A.1	Is this a project or a management action?	Choose whether this is categorized as a project or management action from the drop-down menu.	Y					
3	A.2	Project or Management Action Name	The name of the project or management action.	Y					
4	A.3	Subcategory	(Optional) Provide the subcategory of the project or management action, if applicable, as defined in the GSP (i.e., Tier 1/2/3, Group 1, etc.).	N					
5	A.4	Brief Description	Briefly describe the project or management action (Character limit 2000 characters).	Y					
6	A.5	Project or Management Action Type(s)	Select all applicable types that are applicable to the project or management action from the drop-down list. Multiple selections allowed. Selections are delimited with a semicolon. ** To remove a selection from the field, re-own and re-select the action to remove it.	Y					
7	A.5(a)	S(a) Type Other Description If "Other" was selected for applicable PMA type, provide a description of that type here. Leave blank if "Other" was not selected.							
8	A.6	Lead Implementing GSA	Select the lead implementing GSA(s) from the drop-down list. Multiple selections are allowed. Type into cell to narrow search results. Contact GSPSubmittal@water.ca.gov if the GSA does not appear on the drop-down list. **To remove o selection from the feid, re-open the drop-down menu and re-select the option to remove it.	Y					
9	A.7	Other Implementing GSA(s)	Select other implementing GSA(s) from the drop-down list. Multiple selections are allowed. Type into cell to narrow search results. Contact GSP5oUmittal@water.ca.gov if the GSA does not appear on the drop-down list. **To remo e selection from the field, re-own the drop-down neuran and re-steel the option to remove it.	N					
10	8.1	Is the location known?	Select whether the project or management action location is known from the dropdown menu.	Y					
11	B.1(a)	Explain why the location is not known.	If the location of the project is not known, provide an explanation.	Conditional - Required if "No" is selected for "Is the location known?"					
12	B.2	Location(s) Description	Briefly describe the location(s) of the project or management action.	Conditional - Required if "Yes" is selected for "Is the location known?"					
12	B.3	Covers entire basin?	her the project or management action covers the entire basin (i.e., the project is not associated with a specific location).	Conditional - Required if "Yes" is selected for "Is the location known?"					
	$\leftarrow \rightarrow$	Batch Import Spreadsheet Field Descrip	ions 🔶						
R	eady 📧	🎲 Accessibility: Good to go	G Display Settings 🌐 🗐	≝+ +	85%				

Figure 11. Screenshot of the Batch Import template. The "Field Descriptions" tab is highlighted.



8. Selections in certain fields can result in corresponding fields graying out in the same row. Do not enter text into these grayed out fields.

a M			N	0	1	Р		Q	в	s
1	B.1° - Describe the circumstances under which the project or management action shall be implemented	B.2° - Does the project have an expected initiation and completion date?		B.2(a) - If no ex and/or completion describe the cond trigger impleme termination of	B.3" – Expected initiation year		B.4° - Expected completion year	C.1" - Are estimated costs known?	C.1(a)" – Describe v estimated cost are unkr	
2	Test	Yes		• *******			2020	2025		
3			Initiation	and Completion		-				
5			Select wh	ether the project or		0				
6			managen	ent action has an		0				
7			expected	initiation date and						
8			completio	on date from the						
10			drondow	menu						
11			aropuom	i meno.						
12			2							
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16										
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18										
19										
20										
22										
23										
24										
25								-		
26										

Figure 12. Screenshot of the Projects and Management Action Batch Import template spreadsheet. A grayedout field is highlighted indicating that the user should not fill out this field.

9. After filling out the Batch Import spreadsheet, **close the spreadsheet.** If the spreadsheet is not closed, the spreadsheet will not upload correctly. Return to the "**Project or Management Action Import**" page. Upload your completed Batch Import spreadsheet by clicking to upload or dragging your file into the indicated space.

10. Click the "Import Data" button.

		C.Go	Depa V SGM	rtment of	Water Resour	ces			Welcome, SGMA Te O Sign Out 02 Fe	est! 03/27/2024 edback 👤 <u>My Profile</u>		
		A Home	≡ GSA	≡ GSP	≡ Alternatives	C Adjudicated Areas	C Basin Modification	C 1	Ionitoring Network	t 7 File Transfer		
	Home / My	Projects 7 Imp	port									
				Pr	oject or	Managem	ent Action	Im	port			and the second distance
	Instructio Follow the or subbasi	ns steps below to n and must be	import grou reported in a	ndwater extra icre-feet (AF)	iction volumes by w	ater use sector for the sele	icted water year. Groundwa	ater ext	raction volumes mus	t be reported for the e	entire basin	a anna san an
1.2	Step 1.	Download th	e import Pro	ject or Manaş	gement Action Exce	i template.						
	Step 2.	Populate the	import Proje	ect or Manage	ement Action Excel	template with all required	nformation (instr		e in the template).			C. Contractor
	Step 3.	Upload the p	opulated im	port Project o	r Management Acti	on Excel template and clic	k on "Import D)	process.			and the party of the
	10	≝ Import	Data			Clici drag	k to upload OR files here					

Figure 13. Screenshot of the Projects and Management Action Import page. The area to click or drag the spreadsheet is highlighted as Step 9. The "Import Data" button is highlighted as Step 10.



11. If there are errors in the Batch Import template, an "**Error(s)**" popup box will appear which will indicate the corresponding row that the error is located in and the field that contains the error. No PMAs are imported if there are errors. If the "**Error(s)**" popup appears, fix the indicated errors on the Batch Import template and re-upload following the directions in the previous step.



Figure 14. Screenshot of "Error(s)" popup box. The text in the popup box is highlighted which provides the corresponding row of the error and the field that contains the error.

12. If there are no errors, a "**Success**" popup box will appear indicating that the upload was successful. The "**Success**" popup box indicates that the PMAs were submitted to the **Projects and Management Actions Module**.

	PA Departmen	t of Water Resources	Welcome, SGMA Test 04/19/2024
	GOV SGMA P	Success	×
	A Home ≡ GSA ≡		ebwork 13 File Transfer
Home / My	Projects / Import	1 project or management actions imported.	
Contraction of the local division of the loc			
Instruction Follow the Managem	ins instructions below to import the Pr ent Actions module	opect or Management Action Excel template. This process will import new projects an	Sive 12 Projects and
Step 1.	Download the import Project or I & Download Excel Template	Management Action Excel template.	
Step 2.	Populate the import Project or N	lanagement Action Excel template with all required information (instruction tab availab	ble in the template).
Step 3.	Upload the populated import Pro	ject or Management Action Excel template and click on "Import Data" to start the imp	ort process.

Figure 15. Screenshot of the "Success" popup box, indicating that the PMAs were uploaded successfully.



13. After successfully uploading the Batch Import template, the PMAs will appear in the "My **Projects/Management Actions**" page.

	Department of Water Resources GOV SGMA PORTAL						
n Home		C Adjudicated Areas	C Basin Modification	C Monitoring N	Network E	3 File Transfer	
Home / My Projects							
	My Proje	ects / Mana	gement A	ctions			
+ New Project Importer					Search:		
Project Name	A GSA) Basin / Subbasin	(GSP(s)	Status ()	Updated By	Last Updated	Action(s)
G Test Project 1	SGMO Test	5-069 YOSEMITE VALLEY		SUBMITTED	SGMA Test	03/20/2024 10:17:38	÷
G Test Project 2	SGMO Test	5-069 YOSEMITE VALLEY		SUBMITTED	SGMA Test	03/20/2024 11:48:47	- 1
C Test Protect 3	SGMO Test	5-069 YOSEMITE WILLEY		SUBMITTED	SGMA Test	03/20/2024	÷
G Test Project 4	SGMO Test	5-069 YOSEMITE VALLEY		SUBMITTED	SGMA Test	03/27/2024 14:06:10	1
Showing 1 to 4 of 4 entries						Previous 1	Next

Figure 16. Screenshot of the "My Projects/Management Actions" page highlighting the newly uploaded PMA that was imported via the Batch Import template.



3.1.3 How to Enable VBA Macros in the Batch Import Template

The following two methods can be used to enable macros within the Batch Import template. Enabling macros should be done at the User's discretion and should follow the User's organizational policies.

Enabling macros may be blocked by some organizations' security settings. If the following methods are not available due to organizational security settings, the User should contact their organization's administrator. Additionally, the User can contact <u>GSPSubmittal@water.ca.gov</u> for further assistance.

3.1.3.1 Enabling VBA Macros within the Workbook Only

If the User opens the file and finds that the macros have been blocked within the workbook, the User can change the settings to run the macros for the file only.

1. The User may see a "Security Warning" banner at the top of the Excel file. If this banner appears, click "Enable Content". If this banner does not appear, go to Step 3.



Figure 17. Screenshot of the "Security Warning" banner, highlighting the "Enable Content" option.

2. A "**Security Warning**" popup box will appear. Click "**Yes**" to make the file a Trusted Document. Once the User selects "**Yes**", the macros within the file will be enabled.



Figure 18. Screenshot of the "Security Warning" popup box, highlighting the "Yes" option.

3. The user may see a "Security Risk" banner instead of the "Security Warning" banner shown in Step 1. If the "Security Risk" banner appears, move on to the next step. If the "Security Risk" banner does not appear, go to <u>Section 3.1.3.2</u>.

		3
SECURITY RISK Microsoft has blocked macros from running because the source of this file is untrusted.	×	

Figure 19. Screenshot of the "Security Risk" banner.



- 4. Close the file. In File Explorer, navigate to the folder where the file is saved.
- 5. Right click the file and click "Properties".

4	\rightarrow \checkmark \uparrow \clubsuit > This PC > Window	vs (C:) > Users > >	Downloads	~	Ö	Search Downloads	مر
>	^	□ Name ~ Today (1)				Date modified	4
>		20240412_SGM	_PMA_Batch_Import			4/15/2024 4:29 PM	Mic
> •	This PC	 > Last week (1) > Earlier this month (5) > Last month (26) 	view Sort by Group by Refresh	/ > >			
>	🗊 3D Objects	> Earlier this year (32)	Customize this folder				
> >	 Desktop Documents 	> A long time ago (160)	Paste Paste shortcut Undo Rename	Ctrl+Z			
>	Downloads	-	Give access to	>			
>	Music Pictures		New	>			
>	Videos	L	Properties				
>	U Windows (C:)				5		

Figure 20. Screenshot of File Explorer, with the saved file highlighted as Step 4 and the "Properties" option highlighted for Step 5.

6. The **Properties** window will open. At the bottom of the "General" tab in the "Security" section, check the "**Unblock**" checkbox. When the file is reopened, the macros will be enabled.

20240412_S	GMA_PMA_Batch_Import (1) Properties	×
General Secu	urity Details Previous Versions	
×	20240412_SGMA_PMA_Batch_Import (1)	
Type of file:	Microsoft Excel Macro-Enabled Worksheet (.xlsm)	
Opens with:	Excel Change	
Location:	C:\Users\ Downloads	
Size:	77.1 KB (79.029 bytes)	
Size on disk:	84.0 KB (86,016 bytes)	
Created:	Monday, April 15, 2024, 4:29:22 PM	
Modified:	Monday, April 15, 2024, 4:29:24 PM	
Accessed:	Today, April 15, 2024, 4:29:24 PM	
Attributes:	Read-only Hidden Advanc	6
Security:	This file came from another computer and might be blocked to help protect this computer.	
	OK Cancel Apply	,

Figure 21. Screenshot of the "Properties" window, highlighting the location of the "Unblock" checkbox.



3.1.3.2 Changing Excel Settings to Enable VBA Macros

The User can change their settings in Excel to allow macros. This method will only change the settings of Excel and will not change other Microsoft 365 Applications.

1. Open Excel. Select the "File" tab and go to "Options".

			Book2 · Excel			R ? – D	×
©	Good morning						
🛆 Home	~						-
New	A 8 6				Project Playmer		
🗁 Open	7	Take a tour	Get started with . Formulas	Make your first PivotTable		and the second s	
E Get Add-ins	4 5 6	•	fx)	(7)	1 1	1	
lefo	Blank workbook	Welcome to Excel	Formula tutorial	PivotTable tutorial	Gantt project planner	Simple Gantt chart	
Saue						Martin A	
Save As	O Search					more templates	
Save as Arlohe	Percommended for You						
PDF	- Recommended for Tod						
Print							
Share							
Share as Adobe PDF link							
Export							
Publish							
Close	Decent Disped Charad	with Ma					
	Recent Pinned Shared	with Me					
	🗋 Name				Date modified		
Account	1						
Feedback							
Options			Ø 5				¥

Figure 22. Screenshot of Excel, highlighting the "Options" location.

- 2. Select the "Trust Center" tab.
- 3. Select "Trust Center Settings".



Figure 23. Screenshot of the Excel Options window, highlighting the "Trust Center" tab for Step 2 and "Trust Center Settings" for Step 3.



3. Select the "Macro Settings" tab.

4. Select "Disable VBA macros with notification". This will allow the User to designate the files to enable macros on a case-by-case basis.

Trust Center		?	\times
Trusted Publishers	Macro Settings		
Trusted Locations	4		
Trusted Documents	O Disable VBA macros without notificat		
Trusted Add-in Cat	Disable VBA macros with notification Disable VBA macros except digitally signed macros		
Add-ins 2	Enable VBA macros (not recommended; potentially dangerous code can run)		
ActiveX Settings			
Macro Settings	Enable Excel 4.0 macros when VBA macros are enabled		
Protected View	Developer Macro Settings		
Message Bar	□ Trust access to the <u>V</u> BA project object model		
External Content			
File Block Settings			
Privacy Options			
Form-based Sign-in	ОК	Cancel	

Figure 24. Screenshot of the Trust Center options, with the location of the "Macro Settings" tab highlighted as Step 3 and the "Disable VBA macros with notification" highlighted as Step 4.

5. When the User reopens the file, the "Security Warning" box will appear at the top of the screen. Click "Enable Content" and follow the instructions in <u>Section 3.1.3.1</u> to enable the macros within the Batch Import template file.



Figure 25. Screenshot of the "Security Warning" box. The "Enable Content" box is highlighted as Step 5.



4. Updating a Submitted Project or Management Action

This section describes the process of updating data associated with submitted PMAs. The general process of editing data associated with a submitted PMA is described in <u>Section 4.1</u>.

The option to submit data to **Sections F (Monitoring)** and **G (Additional Documents)** becomes available only after the PMA is submitted. **Sections F and G** cannot be added by the batch import template and must be added by editing an existing PMA. The process of submitting data to **Sections F and G** is described in <u>Section 4.2</u>.

A description of the PMA's implementation progress is required to be submitted on an annual basis in **Section H (Implementation Updates)**. At this time, implementation updates in Section H can be submitted within each PMA's respective page. Batch upload functionality for **Section H** is not available at this time; however, this feature is planned to be added as part of the SGMA Portal's Annual Reporting Module in a future update. The process for adding implementation updates to **Section H** is described in <u>Section 4.3</u>.

4.1 Editing an Existing Project or Management Action

1. Navigate to the "**My Projects/Management Actions**" page. The PMAs that are associated with the User's account will appear in the table. Navigate to the desired project or management action and click the hyperlink of its name in the first column.



Figure 26. A screenshot of the "My Projects/Management Actions" page. The hyperlink under the first column is highlighted as Step 1.



2. The "Edit Project/Management Action" page will load.

3. Use the ">" symbol on the right side of any of the section headers to collapse or expand a section.

	Cov SGMA PORTAL	Western, STAN Teel (V15500) O <u>Byr Cef (O Fanches</u>) <mark>A byfrafe</mark> Mar O Bash Modfarder, O China Tradar	
	Home / My Projects / Edit Project Management Action		2
and the second sec	🖸 Edit Project / N	lanagement Action	
Contraction in the second seco	A Project or Management Action Information	¥	
and the second se	• 1. is this a project or a management aution?	[Pigat •	ALL THE REAL PROPERTY AND A DESCRIPTION OF THE PARTY OF T
the second second	+ 2. Provide the project or management action name.	Test Project 1	And and a second se
	1. Provide a subselegory, if applicable.	(GrapA	The Address of Address
	4. Driefly describe the project or management action. <i>June processes</i> 2003	tust (Contraction of the second seco
ef.	6. Select all applicable project or management action types.	Direct Rectarge x) Supply Augmentation x	The second se
	• 8. Select a lead implementing O SA,	EGAD Test x	A MARINE STATE AN
the state of the s	7. Select other inglementing 0 SAs.	Solid the GI	The second second
	E. O BP(c) is continently Lawer CSA presidency		T
and the state of the	R. Bacin(s) / Bubbacin(s) (suo fiseta) 254 associate	[500 YOBMTE VALLEY K]	
	Required First(s)	Canar	
Real Providence	B Location	>	
	C Schedule and Implementation	3 2	
	D Costs	· · · · · · · · · · · · · · · · · · ·	
and the second se	E Benefits	>	Contract of the second s
and the second sec	E Monitoring	>	
	G Additional Documents	>	
li e	H Implementation Updates	>	
A CONTRACT OF			La la vice da anticipada de la constante

Figure 27. A screenshot of the "Edit Projects/Management Action" page. The "Edit Projects/Management Action" page is highlighted as Step 3. The ">" button, which can collapse or expand a section, is highlighted as Step 3.

4. Changes to **Sections A through E** must be saved by using the "**Update**" button located at the bottom of **Section E**.

	🔒 Home	≣ GSA	≣ GSP	Alternatives	Adjudicated Basins	C Basin Modification	C Monitoring Network	■ State Intervention	17 File Transfer	
	Home / All	Projects (Adr	min) / Edit Pr	roject Management	dit Project	/ Manager	ment Action	1		-
	A Pr	oject or	Manage	ment Action	Information				>	
	B Lo	cation							>	
	CSc	hedule	and Imp	lementation					>	
	DCo	osts							>	
	E Be	enefits			4				>	
1						Ipdate Cancel				

Figure 28. A screenshot of the "Edit Project/Management Actions" page. The "Update" button at the bottom of Section E is highlighted.

5. Sections F through H do not require the User to use a save button to save changes. For further information on editing Sections F or G, See Section 4.2. For further information on editing Section H, See Section 4.3.



4.2 Completing Sections F and G

The option to submit data to **Sections F (Monitoring)** and **G (Additional Documents)** becomes available only after PMAs are submitted to the module. **Sections F and G** cannot be added by the batch import template and must be added by editing an existing PMA. Please note that while **Section F** is currently viewable on the PMA Module, it is currently under construction and the features are not fully available; data will not be able to be submitted or changed in **Section F** until future updates of the PMA Module.

1. Navigate to the desired PMA's page by clicking the PMA's hyperlink on the "My Projects/Management Actions" page.

		rtment of Water Resource IA PORTAL	5	Welcome, O <u>Sign O</u>	SGMA Test 03/20/2024 ut I Gi <u>Freeback</u> I J. My ProBe		
	A Home 🗏 GSA	≡ GSP ≡ Alternatives	C Adjudicated Areas C Basi	Modification C Monitoring N	letwork 13 File Transfer		
	Home / My Projects	My Projec	ts / Managen	ent Actions	Search:		
E-sugar	Project Name	4 GSA	🕴 Baeln / Subbaeln 👌 GSP() Statue :	Updated By Last Updated	Action(s)	A COLORADOR AND INCOLOR
	G Test Project 1	SGMO Test	5-069 YOSEMITE VALLEY	SUBMITTED	5GMA Test 03/20/2024 10:17:38	1	Alter a war
	C Test Project 2	SGMO Text	5-089 YOSEMITE VALLEY	SUBMITTED	SGMA Test 03/20/2024 11.48.47	1	The star as
	G' Test Project 3	SGMO Test	5-089 YOSEMITE WILLEY	SUBMITTED	SGMA Test 03/20/2024 11.49.48	1	ALC: NOT
	Showing 1 to 3 of 3 entries				Previous 1	Next	

Figure 29. A screenshot of the "My Projects/Management Actions" page. The hyperlink under the first column is highlighted as Step 1.

2. On the PMA's page, navigate to **Section F**. The table will display the wells in Monitoring Network Module that are associated with the Lead GSA. Currently, these wells are view-only and no data can be submitted or changed. This feature will be built out and updated in future updates of the PMA Module.

F Monitoring						*
Local Site Code 🔶 Well Name Associated GSA	Monitoring Network Type	RP Elevation (ft.) \$	GS Elevation (ft.) ϕ	Well Perforation Depth Top (ft. (ft. bgs) bgs) ø	Perforation Bottom (ft. Latitude bgs) (N)	Longitude [W]
<u>389082N1198641W001</u>	SGMA Representative	341.43	340.43		38.9082	-119.8641
<u>388946N1201107W001</u>	SGMA Representative	233.35	232.35		38.8946	-120.1107
389852N1198799W001	SGMA Representative	380.39	378.39		36.9852	-119.8799
<u>389552N1199441W001</u>	SGMA Representative	325.87	325.37		36.9552	-119.9441

Figure 30. A screenshot of Section F showing the Lead Agency's wells.



3. On the PMA's page, navigate to **Section G**. Click the **"Upload Project Document**" button. The **Project Document Form** popup box will appear.

Upload Project Document				Search:	
tte 3	÷ File or URL	÷	Uploaded Date	Action(s)	
	No data av	silable in table			

Figure 31. A screenshot of Section G. The "Upload Project Document" box is highlighted.

- 4. Fill out the required information on the **Project Document Form** popup box.
- 5. When completed, click "Save".

A Home ≡ GSA ≡ 0 Home / My Projects / Edit Project Management	Title	4 C3 File Transfer
	Description	
A Project or Managemen		>
B Schedule and Impleme	DOCUMENT FILE File Attachment	>
C Costs	Click to upload OR	>
DBenefits	drag files here	>
E Monitoring	— OR —	~
Local Site Code Well Name Associated GSA	http(s).//	Perforation Latitude Longitude Bottom (It. bgs) [N] [V/]
Showing 0 to 0 of 0 entries	Required Field(s) •• Conditionally Required Field(s) Save Cancel	
E Additional Documents	5	

Figure 32. A screenshot of the Project Document Form. The form's fields are highlighted as Step 5. The "Save" button is highlighted as Step 6.

6. The uploaded document will now appear in Section G.

Upload Project Docu	iment				Search:	
tie	 Description 	$\frac{A}{\Psi}$ File or URL	÷	Uploaded Date	+ Action(s)	6
ocument 1		test file.docx (12.8kB)		04/19/2024 11:54 AM	C Ê	-

Figure 33. A screenshot of Section G. The newly uploaded document in the table is highlighted.



5. Providing PMA Implementation Updates – Completing Section H

This section outlines the process of adding new PMA Implementation Updates to the PMA Module.

The new Implementation Updates feature provides agencies with the ability to report and track progress on the implementation of their PMAs over time. Implementation Updates are submitted to the agencies' existing PMAs on the PMA Module. The updates consist of providing the status of the PMA during each water year (WY). Depending on the status of the PMA, other information may be required to be provided, such as a description of the PMA's progress, benefits accrued, and new funding obtained.

Per 23 CCR § 356.2(c), Annual Reports must include a description of progress towards implementing the Plan, including the implementation of projects or management actions since the previous annual report. At least one Implementation Update per water year will be required for each PMA starting in the WY 2025 Annual Report. Implementation Updates may be submitted at any time, but at least one update for per water year is required for each PMA by the time that Annual Report submissions are due (April 1st of each year).

The SGMA Portal provides the following three methods for GSAs to submit implementation updates for their PMAs, which are explained in subsequent sections of this User Manual:

- 1. Submitting an Individual Implementation Update to a PMA in Section H (See <u>Section 5.1.1</u>)
- 2. Batch importing Implementation Updates to multiple PMAs simultaneously (See Section 5.1.2)
- 3. Submitting Implementation Updates via the Annual Reporting Module (See Section 5.2)

Regardless of the method that is used to submit the Implementation Updates, the Implementation Updates for each PMA are stored in **Section H** on the respective PMA page.



5.1 Providing Implementation Updates via the PMA Module

5.1.1 Adding an Individual Implementation Update

1. Navigate to the PMA's page that you want to add an Implementation Update to by clicking the PMA's hyperlink on the "**My Projects/Management Actions**" page.

		artment of Water Resource	Wekcome, SOMA Test 03/20/2024 ♦ Sign Out I & Feedback I & My Profile						
	thome ≡ GSA		Adjudicated Areas	Basin Modification	C Monitoring Net	work 121	File Transfer		
	Home / My Projects								
		My Proje	cts / Mana	aement A	ctions				
	+ New Project	, ,		0		Search:			Contraction of the local division of the loc
	Drolard Nama	A 014	Baeln / Suthaeln	1 C4D(m)	Status 1 11	ordated By	Last lindstad	Antion(a)	Contraction of the local division of the loc
	G Inst Project 1	SGMO Test	5-009 YOSEMITE VALLEY	(use(e))	SUBMITTED S	IGMA Test	03/20/2024 10:17:38	1	And a
	(3' Test Project 2	SGMO Test	5-069 YOSEMITE VALLEY		SUBMITTED S	GMA Test	03/20/2024 11:48:47	1	ALC HAR
	G' Test Project 3	SGMO Test	5-069 YOSEMITE VALLEY		SUBMITTED S	GMA Test	00/20/2024 11:49:48	1	A COLOR
23	Showing 1 to 3 of 3 entries						Previous 1	Next	A State of
									Harris and
-									
and the second second									NAMES OF TAXABLE PARTY.
all the second									

Figure 34. A screenshot of the "My Projects/Management Actions" page. The hyperlink under the first column is highlighted.

2. On the PMA's page, navigate to Section H. Click the "New Implementation Update" button. The Implementation Updates form will appear.

G Additional Documents	>
H Implementatic 2	
+ New Implementation Update	Search:
Water Year 🍵 Updates	Status Updated By Submitted Date Files Action(s)
2021 Test	Conceptual Reanna Ennis 03/10/2025 🖸 👁 🏛

Figure 35. A screenshot of Section H. The "New Implementation Update" button is highlighted.



3. Fill out the required information on the **Implementation Updates Form**. The required fields will change depending on the selected option in the "**Status**" field. The red asterisk ("*****") indicates whether a field is required.

4. If "Conceptual", "Planning", "Construction", "Ongoing", "Completed – Accruing Benefits", or "Completed – Benefits Fully Realized" are selected for the "Status" field, then there will be several required follow-up questions (Questions 4 through 7).

Please note that if **"Completed – Benefits Fully Realized**" is selected, then subsequent future Implementation Updates will **not** be required to be provided for the PMA. Select this option if the PMA has been completed and the GSA expects to provide no future updates on this PMA.

Conversely, if "**Completed – Accruing Benefits**" is selected, then future Implementation Updates will still be required to be provided for the PMA. Select this option if the PMA has been completed, but the GSA can continue to report ongoing benefits from the PMA in future updates.

Site G	Implementation Updates				
3406	1. Implementation Date	 2. Water Year 	• 3. Status		4
34867	MM/DD/YYYY	Enter a Water Year (YYYY)	Ongoing	~	9211
34972	4. Describe the project or management characters: 4000)	nt action's progress towards implementing the plan	since the previous annual report (23 CCR § 356.	?(c)). (Max.	5573
3458	Enter the description here				6448
34078					71
34887				h	8461
3400	• 5. Were new sources of funding acquired to the sources of funding acquired to the sources of t	iired?	Yı	s⊖ No⊖	4533
34555	6. Were quantifiable water supply be	on? Yı	s⊖ No⊖	8741	
34855	• 7. Were other benefits obtained from	this project or management action?	Yı	s⊙ No⊙	3694
34055	8.Document Description. (Max. Charact	ers: 2000)			3894
Sh Sh	Enter the document description here			1	
G	File Attachment(s) - multiple files all	owed. (Click to upload or drag files to the box below)			*
		Click to upload OR			:tion(s)
Sho		orag mes héré			Next
	Required Field(s)		Sa	e Cancel	~

Figure 37. A screenshot of the Implementation Updates form. The "Status" field is highlighted for Step 4. Questions 2, and 4 through 7 are preceded by a red asterisk ("*"), indicating that these fields are required.



5. If "**No Update**" is selected for the "**Status**" field, all remaining fields except for "Water Year" are optional.

-	Site C	Implementation Updates					-				
	34660	1. Implementation Date	• 2. Water Year	• 3. Status		5	No. of Concession, name				
	34857	MM/DD/YYYY	Enter a Water Year (YYYY)	No Update	~	9211					
	34673	4. Provide an Explanation. (Max. characters	s: 4000)			5573	the second				
	34687	Enter the description here	9448								
	34678					71	BILL STORE				
-	34660		8461	- Hit and							
	34660	5.Document Description. (Max. Characters:	5.Document Description. (Max. Characlers: 2000)								
	34860	Enter the document description here			1.	4544					
	34686	File Attachment(s) - multiple files allower	ed. (Click to upload or drag files to the box below)			8741					
24	3465					3694					
22	3485		Click to upload OR			3694 🕳					
14	Sh		drag hies here								
-49.55		<u> </u>									
Ser and	G	 Required Field(s) 			Cappel		RECEIPTION AND ADDRESS				
	+			Sav	Cancel						

Figure 38. The "Status" field with "No Update" selected is highlighted for Step 5. Question 2, "Water Year", is another required field on the form.

6. If "**Removed/Withdrawn**" is selected for the "**Status**" field, the PMA will be removed from the list of the GSA's PMAs. The "Water Year" and an explanation are required.

After submitting this Implementation Update, the GSA will **not** be required to provide future Implementation Updates to the PMA.

1.	Implementation Date	 2. Water Year 	3. Status	U
34657	MM/DD/YYYY	Enter a Water Year (YYYY)	Removed/Withdrawn	¥ 8211
3487	4. Provide an explanation for withdrawing	g this PMA. (Max. characters: 4000)		15573
34681	Enter the description here			0448
34878				71
34881	Document Description. (Max. Characters: 2	2000)		8461
34000	Enter the document description here			4533
34880	File Attachment(s) - multiple files allowed	d. (Click to upload or drag files to the box below)		4544
34696				8741
34858		Click to upload OR		3694
34855		drag files here		3694 🕳
Sh				

Figure 39. The "Status" field with "Removed/Withdrawn" is highlighted for Step 6. The "Water Year" field and the explanation field are required fields on the form.



7. When the form is complete, click "Save".

	Department of V	ater Resources	Welcome, Reanna	Ennis! 03/10/2025	ie.
	Implementation Updates			×	
A He	on				ler
Home	1. Implementation Date	2. Water Year	3. Status		
Marcon Contraction	MM/DD/TTTT	2025	Ongoing	~	
A	4. Describe the project or manageme characters: 4000)	nt action's progress towards implementing the	plan since the previous annual report (23 C	CR § 356.2(c)). (Max.	>
	Description of PMA				
B				1.	>
C	5. Were new sources of funding acqu	ired?		Yes 🔍 No 🖲	>
	6. Were quantifiable water supply ber	efits obtained from this project or management	nt action?	Yes 🔍 No 🖲	>
E	7. Were other benefits obtained from	this project or management action?		Yes 🔍 No 🖲	>
	8.Document Description. (Max. Chara	cters: 2000)			
	Document Upload Description			1.	>
G	File Attachment(s) - multiple files alk	wed. (Click to upload or drag files to the box below	w)		>
E E	1.4 MB				~
-	- 1				
	Remove file				on(s)
Sho	w		7		ext
	 Required Field(s) 		· · · · · ·		
				Cancel	·

Figure 40. Screenshot of the Implementation Updates form. The "Save" button is highlighted for Step 7.

8. After saving, the update will appear in **Section H** on the PMA's page.

G Additional Documents	
H Implementation Updates	
+ New Implementation Update	Search:
Water Year 💧 Updates	🚸 Status 🧄 Updated By 🌢 Submitted Date 🚽 Files 🌢 Action(:
2025 Description of PMA	Ongoing Reanna Ennis 03/10/2025 📔 🖸 💇

Figure 41. Screenshot of Section H – Implementation Updates on the PMA's page. The recently submitted implementation update is highlighted for Step 8.



5.1.2 Batch Import Method – Adding Implementation Updates

1. Go to the My Projects/Management Actions page. Click the "**Implementation Update – Batch Update**" icon.



Figure 42. Screenshot of the "My Projects/Management Actions" page. The "Implementation Update – Batch Update" button is highlighted for Step 1.



2. Select a **basin/subbasin** from the dropdown menu.

Only basins that correspond to the GSA(s) that the User is associated with will appear in this menu. If the desired basin/subbasin does not appear in the menu, go to <u>Section 6</u> for instructions on granting User Permissions.

3. Select an option for downloading the batch update spreadsheet. These selections will partially prepopulate the spreadsheet with information from the PMAs.

The first option, "All PMAs associated with the basin or subbasin", will download a pre-populated spreadsheet with all PMAs associated with the selected basin/subbasin.

The second option, "All PMAs that require an update (# of Updates = 0)", will download a prepopulated spreadsheet with PMAs from the basin/subbasin that do **not** currently have an associated Implementation Update for a selected water year. If this choice is selected, a box to type in the water year will appear. Type the year in the box.

4. After making the selections, click "Download Excel Template".

	<i>Cl</i> .co	Dep DV SG	artment of Wat	er Resources		Welco O Si	ome, 03/10/ gn.Out C7 <u>Feedback</u> L	2025 M <u>y Profile</u>
ft Home	≣ GSA	≣ GSP	■ Alternatives	Adjudicated Basins	Basin Modification	C Monitoring Network	■ State Intervention	17 File Transfer
Home / A	II Projects (Adr	nin) / Imple	mentation Updates E	Batch Import				
			PMA Im	plementation	on Updates	s - Batch In	nport	
Instruct Follow t selected Excel m Projects	tions he instructions I basin/subbasii acros must be (and Managem	below to imp n. The impler enabled on tl ient Actions M	ort the PMA Impleme mentation updates ca his spreadsheet for th Module User Manual	entation Updates Batch Imp an be found in Section H on he batch upload process to provided on the <u>SGMA Por</u>	oort template. This process each PMA's page. work correctly. For instruct tal Resources webpage. Fo	will batch import new impler ions on enabling macros, pl or more assistance, please of	mentation updates to exist ease see Section 3.1.3 in contact <u>GSPSubmittal@w</u>	ing PMAs in the the <u>SGMA Portal</u> ater ca.goy
Step 1.	Download th Selec All All Dow	ie pre-filled F it the Basin (lect a basin / I PMAs asso I PMAs that (wnload Exce	MA Implementation for the import 'subbasin cciated with the bas require an update (Template	Updates Batch Import temp in or subbasin @ # of Updates = 0 for selec	ted water year)	w to customize which PMAs	will be included on the te	mplate.
Step 2.	Populate the	e PMA Imple		mport Excel template	with all required information	in (see the ReadMe tab in th	ne template for more infor	nation).
Step 3.	Upload the p	populated PN	vIA Implementation U	Ipdates Batch Import Excel	template and click "Import	Data" to start the import pro	cess.	
					Click to upload OR drag files here			

Figure 43. Screenshot of the "PMA Implementation Updates – Batch Import" page. The basin/subbasin dropdown menu is highlighted for Step 2. The two options for downloading the batch update spreadsheet are highlighted for Step 3. The "Download Excel Template" button is highlighted for Step 4.



5. Open the newly downloaded excel file. <u>Macros must be enabled for the spreadsheet to work</u> <u>correctly</u>. See <u>Section 3.1.3</u> for instructions to enable macros.

The "PMA DB ID", "PMA ID", "PMA Name", "Basin", "Lead GSA(s)", and "GSP" columns will be prepopulated depending on your selection in the previous step.

File Hon	ne Insert Drav	w Page Layout Formulas Data	Developer Review View Automate	e Help Acrobat			
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A	В	C	D	E	F	G	н
PMA DB	PMA ID	PMA Name	Lead GSA(s)	Basin	GSP	Implementation Date	Water Year
2 939 5 3 940 5 4 941 5 5 942 5 6 943 5 7 944 5	5-029_PMA_0 5-029_PMA_1 5-029_PMA_2 5-029_PMA_3 5-029_PMA_4 5-029_PMA_5	PMA 6 PMA 1 PMA 2 PMA 3 PMA 4 PMA 5	SGMD GSA SGMD GSA SGMD GSA SGMD GSA SGMD GSA SGMD GSA	0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD	0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD		
8 9 10 11 12 13						4	
15 16 17 18							

Figure 44. A screenshot of the downloaded excel sheet. The pre-populated columns are highlighted for Step 4.

6. If you do not wish to upload an Implementation Update to a certain PMA, you can delete the entire pre-populated row. You must delete the <u>entire row</u> – do **not** delete cells or shift cells, or you may import the Implementation Updates to incorrect PMAs.

To delete the entire row, right-click on the row heading (the number which labels the rows) on the left side of the spreadsheet to highlight the **entire row**. A menu will appear.

7. Click "Delete" in the menu. The row will delete.

	File	Home Insert Dra	w Pag	ge Layout Formulas Data	Developer	Review View Automat	e Help	Acrobat				
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	A	В		С		D		E		F		G
1	PMA ID	DB PMA ID		PMA Name		Lead GSA(s)		Basin		GSP	Implem	entation Date
2345	6		~ % - [•] .00 - <u>°</u>	9 ⊞	SGMD GSA SGMD GSA SGMD GSA SGMD GSA SGMD GSA		0-000 SGM0 0-000 SGM0 0-000 SGM0 0-000 SGM0 0-000 SGM0))))	0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD 0-000 SGMD			
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30	<u>e.</u>											
21		lannel I allanka										

Figure 45. A screenshot of the Batch Import excel template. The row heading area to right-click is highlighted for Step 6. The "Delete" option in the menu is highlighted for Step 7.



8. Fill in the required columns. Required fields are marked with a red asterisk ("*") and conditionally required fields are marked with two blue asterisks ("**").

The required fields will change depending on your selections in certain fields. The spreadsheet will gray out fields that are no longer required depending on your selection in other fields.

9. To read more about field descriptions and requirements, go to the "Field Descriptions" tab.

H6 🗸 🗸 🗸	/ fx ~						
G	н	1 I	J	ĸ	L	M	N
Implementation Date	Water Year *	Status *	Describe the project or management action's progress towards implementing the plan since the previous annual report. **	No Update - Provide an explanation.	Provide an explanation for withdrawing the PMA. **	Were new sources of funding acquired? **	Select Funding Sources **
2 3 4 5 6	2025 2025 2025 2025	Planning Construction Ongoing Ongoing					
7 8 9 10 11 12 13 14 14 15	Water Yes Provide th correspon implemen update re format.	ar iee Water Year diding to this itation cord, YYYY				8	
16 17 18 19 20 21 22							
23 24 25 26 27 28							
30 31 32 33 34 35			9				
ReadM	Batch Import S	Field Descri	ptions +	1.4	-		

Figure 46. A screenshot of the Batch Import Spreadsheet for Implementation Updates. Grayed out fields on the spreadsheet are highlighted for Step 8. The "Field Descriptions" tab is highlighted for Step 9.

10. After the spreadsheet is completed, close the spreadsheet. Go back to the **PMA Implementation Updates – Batch Import** page. Upload the completed spreadsheet by clicking to upload or dragging the files into the upload box.

11. After you upload your spreadsheet, click the "Import Data" button.

Instruct Follow th selected Excel m Projects	ions to instructions below to import the PMA Implementation Updates Batch Import template. This process will batch import new implementation updates to existing PMAs in the basin/subbasin. The implementation updates can be found in Section H on each PMA's page. acros must be enabled on this spreadsheet for the batch upload process to work correctly. For instructions on enabling macros, please see Section 3.1.3 in the <u>SGMA Portal</u> and <u>Management Actions Module User Manual</u> provided on the <u>SGMA Portal Resources</u> webpage. For more assistance, please contact <u>GSPSubmittal@water.ca.gov</u> .
Step 1.	Download the pre-filled PMA Implementation Updates Batch Import template. Make selections below to customize which PMAs will be included on the template. Select the Basin for the import All PMAs associated with the basin or subbasin All PMAs that require an u, , of Updates = 0 for selected water year) Download Excel Template
Step 2.	Populate the PMA Implementation Updates Batch Import Excel template with all required information (see the ReadMe tab in the template for more information).
Step 3.	Upload the populated PMA Implementation Updates Batch Import Excel template and click "Import Click to upload OR drag files here

Figure 47. Screenshot of the "PMA Implementation Updates – Batch Import" page. The box to upload the completed spreadsheet is highlighted for Step 10. The "Import Data" button is highlighted for Step 11.



12. If you have errors on your uploaded spreadsheet, an "**Error(s)**" popup box will appear. This means that no Implementation Updates were imported. Fix the indicated errors on your spreadsheet and re-upload.

	Er	ror(s)	
Instruction Follow the selected by	ns instructions below to import the P asin/subbasin. The implementatio	port unsuccessful Row 2	ation updates to existing PMAs in the
Excel mac Projects ar	ros must be enabled on this spree nd Management Actions Module L	 The Water Year field is required. Row 3 > Water Year "XXX" is invalid. > The Water Year field is required. 	see Section 3.1.3 in the <u>SGMA Portal</u> act <u>GSPSubmittal@water.ca.gov</u>
Step 1.	Download the pre-filled PMA Imp		be included on the template.
	Select the Basin for the i		Close
	Select a basin / subbasin	~	
	○ All PMAs associated with th	e basin or subbasin	12
	◯ All PMAs that require an up	date (# of Updates = 0 for selected water year)	

Figure 48. A screenshot of the "Error(s)" popup box, indicating which rows in the uploaded spreadsheet contain errors.

13. If there are no errors on your spreadsheet, you will get a "Success" popup box indicating that your Implementation Updates have been uploaded successfully.

		CA	Departmen	t of Water Resources	Welcome	03/10/2 ut 🖸 <u>Feedback</u> 💄 <u>M</u>		
	A Home	≡gsa ≡		Success	×	State Intervention	13 File Transfer	
	Home / Al	ll Projects (Admin)	/ Implementatio	1 PMA Implementation Update(s) imported.				
			PM		Ok	ort		200.00
	Instructi Follow th selected	ions le instructions belov basin/subbasin. Th	v to import the PI e implementation	A Implementation Updates Batch Import temptate. This process will batch import new updates can be found in Section H on each PMA's page.	/ impleme	13 existi	ng PMAs in the	
-	Excel ma Projects	acros must be enab and Management A	led on this spread actions Module U	sheet for the batch upload process to work correctly. For instructions on enabling max er Manual provided on the SGMA Portal Resources webpage. For more assistance, p	cros, please please conta	sc	he <u>SGMA Portal</u> I <u>ter.ca.gov</u> .	
	Step 1.	Download the pre	e-filled PMA Imple	mentation Updates Batch Import template. Make selections below to customize which	n PMAs will	be included on the ter	nplate.	
		Select the	Basin for the in	iport				1000

Figure 49. A screenshot of the "Success" popup box, indicating that the Implementation Updates were uploaded successfully.

14. After the batch import process is completed, you will be able to see the newly imported implementation updates in **Section H** of the respective PMAs.

Contraction during	G Additional Documents						>	
	H Implementation Updates					·	~	
	+ New Annual Update				Search			11
	Water Year 🔶 Updates	0	Status 🍦	Updated By 🝦	Submitted Date 🔻	Files	Action(s)	14
	2025 Description of PMA		Ongoing	Reanna Ennis	03/10/2025 05:28:32	L.	C • Î	
	Showing 1 to 1 of 1 entries					Previous	1 Next	

Figure 50. A screenshot of Section H on a PMA's page, highlighting the newly imported Implementation Update for Step 14.



5.2 Providing Implementation Updates via the Annual Reporting Module

The PMA Module page within the Annual Reporting Module was developed to allow GSAs to verify and add Implementation Updates to their PMAs as needed prior to submitting their Annual Report.

The User can navigate to the Annual Reporting Module through their GSP Dashboard. For more information about the Annual Reporting Module, see the <u>GSP Annual Reporting Module User Manual</u>.

1. While editing an Annual Report within the Annual Reporting Module, click **Section G - "PMA Module"** on the sidebar. You will be taken to the "**PMA Module**" section.



Figure 51. A screenshot of the Annual Reporting Module. Section G on the sidebar is highlighted for Step 1.

2. The table shows the PMAs within the basin. The "**# of Updates during WY**" column shows the number of Implementation Updates that have been provided for the water year (corresponding to the water year of the Annual Report). Note that the table does not show PMAs that have been previously removed/withdrawn.

PMA ID 👙	PMA Name 👙	Lead GSA(a) 🔶	G\$P(8) 🗧	# of Updates during WY 🕴	Action
5-029 PMA 1	PMA 1	SGMA GSA	0-000 SGMA GSP	1	Ø
5-029 PMA 4	PMA 4	SGMA GSA	0-000 SGMA GSP	1	Ø
5-029 PMA 5	PMA 5	SGMA GSA	0-000 SGMA GSP	0	Ø
5-029 PMA 3	PMA 3	SGMA GSA	0-000 SGMA GSP	0	Ø
5-029 PMA 2	PMA 2	SGMA GSA	0-000 SGMA GSP	1	Ø
5-029 PMA 0	PMA 6	SGMA GSA	0-000 SGMA GSP	0	Ø

Figure 52. A screenshot of the table containing the PMAs within the basin. The "# of Updates during WY" column is highlighted for Step 2.



3. There are two options to provide Implementation Updates within the Annual Reporting Module.

Option 1 allows Users to submit their Implementation Updates directly within the table. This option uses the same form described in <u>Section 5.1.1</u> to provide the implementation updates individually to each PMA. For instructions for using Option 1, go to <u>Section 5.2.1</u>.

Option 2 allows Users to batch import their Implementation Updates to submit multiple updates to multiple PMAs simultaneously. For instructions on using Option 2, go to <u>Section 5.2.2</u>.

5.2.1. Option 1 - Adding Individual Implementation Updates in the Annual Reporting Module

1. Navigate to "**Option 1**" within PMA Module section of the Annual Reporting Module. In the table, navigate to the desired PMA. Click the icon in the "**Action**" column.

GW Extraction	G PMA Module	e (Optional)					
B GW Extraction Methods							
C Surface Water Supply	Optional: this se	ection is optional to	r the VVY 2024 Annual	Report. This section will be req	uired starting	g in the Vir 2025 Annual Re	port.
D Total Water Use	Follow the steps bell	low to import impler 23 CCR 6 356 2(c)	mentation updates to t), in the Annual Report	e projects and management a submittal, the Agency is requir	ctions includ	ed in the PMA Module for the	e owards
E Change in Storage	implementing the Pla for submitting this co	lan, including the im ontent:	plementation of project	ts or management actions sinc	ce the previo	us annual report. There are t	two options
F Monitoring Network Module	Option 1. Review yo the icon in the "Upda	our projects and ma ate" column. At leas	anagement actions from st 1 implementation up	n the PMA Module. Provide up date per water year is required	dates as nee for each PM	ded directly within the table A.	by clicking
G PMA Module	Ontion 2 Desuida un	our implementation	updates via the Batch	Import Template spreadsheet.	A pre-filled s	preadsheet can be downloa	ded. At least
Contraction of the second s	Option 2 Provide yo	an unprennensensen					
H GSP Annual Report	1 implementation up	odate per water yea	r is required for each F	PMA.			
H GSP Annual Report	Option 2 Provide yo 1 implementation up Option 1	date per water yea	r is required for each F	MA.			
H GSP Annual Report	Option 2 Provide yo 1 implementation up Option 1 PMAID	¢ PMA Name \$	r is required for each f	\$ GSP(6)	÷	# of Updalee during WY	¢ Action
H GSP Annual Report	Option 1 Option 1 Option 1 <u>S-029 PMA 1</u>	PMA Name PMA 1	r is required for each F	* GSP(4) 0-000 SGMA GSP	÷	# of Updalee during WY	¢ Action
H GSP Annual Report	Option 2 Provide yo 1 implementation up Option 1 PMA ID 5:029 PMA 1 5:029 PMA 4	PMA Name PMA 1 PMA 4	Leed GSA(e) SGMA GSA SGMA GSA		¢	# of Updalee during WY	¢ Action C C
H GSP Annual Report	Option 2 Provide yo 1 implementation up Option 1 PMA ID 5-029 PMA 1 5-029 PMA 4 5-029 PMA 5	PMA Name PMA 1 PMA 4 PMA 5	Leed GSA(e) SGMA GSA SGMA GSA SGMA GSA		\$	# of Updales during WY 1 1 0	+ Action C C C
H GSP Annual Report	Option 2 Provide yr 1 implementation up Option 1 PMA ID 5:039 PMA 1 5:039 PMA 4 5:039 PMA 5 5:039 PMA 3	Adate per water yea PMA Name PMA 1 PMA 4 PMA 5 PMA 3	Leed CSA(s) SGMA GSA SGMA GSA SGMA GSA SGMA GSA SGMA GSA	CSP(e) COU SGMA GSP C-000 SGMA GSP	÷	# of Updalse during WY 1 1 0 0	Action C C C C
H GSP Annual Report	Option 2 Provide yr 1 implementation up Option 1 PMA ID 5-029 PMA 1 5-029 PMA 4 5-029 PMA 3 5-029 PMA 2	Adate per water yea PMA Name PMA 1 PMA 4 PMA 5 PMA 3 PMA 2	Leed G\$A(e) SGMA GSA SGMA GSA SGMA GSA SGMA GSA SGMA GSA	GSP(e) 0.000 SGMA GSP 0.000 SGMA GSP	+	# of Update during WY	+ Action C C C C C

Figure 53. A screenshot showing the table in Option 1. The icon in the "Action" column is highlighted for Step 1.

2. The Implementation Updates form will pop up. Fill out the required information.

For more information about the fields and the required information on this form, see <u>Section 5.1.1</u>, starting at **Step 4**.

	A		Wikinger Rogers Frei	- nt/102024		
	Implementation Updates			х		
ê He				Sec.		
Home	1. Implementation Date	2. Water Year	• 3. Status			
000	MMODIYYYY	2021	Select an option	~		
Contraction of the second seco						
	4. Describe the project or management characters: 4000)	ent action's progress towards implementing the	plan since the previous annual report (23 CCR §	356.2(c)). (Max.	investigation discrete (1)	other Distances in which the rest of the local distances in the loca
B 01	Enter the description here				and the second se	
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Figure 54. A screenshot of the Implementation Updates form. The fields are highlighted for Step 2.

3. Once you have completed the form with the required information, click "Save".

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	Implementation Updates			×	
A 1	ton 1. Implementation Date	• 2. Water Year	• 3. Status	ler.	
Hom	MM/DD/YYYY	2021	Select an option	~	
GS	SP				
	4. Describe the project or manager characters: 4000)	nent action's progress towards implementing the	plan since the previous annual report (23 CCR § 35	8.2(c)). (Max.	
	Enter the description here				
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	 Required Field(s) 		s	Cances	
	the second se				

Figure 55. A screenshot of the Implementation Updates form. The "Save" button is highlighted for Step 3.

4. After the update saves, this Implementation Update will be reflected in the table's "**# of Updates** during WY" column.

GW Extraction Methods								
Surface Water Supply	Optional: This se	ction is optional	for the WY 2024 Anr	nual Rep	port. This section will be re	quired starting	g in the WY 2025 Annua	I Report.
Total Water Use	Follow the steps bel basin/subbasin. Per	ow to import imp 23 CCR § 356.2	lementation updates (c), in the Annual Re	to the p	projects and management bmittal, the Agency is requ	actions includ ired to provide	ed in the PMA Module for a description of progre	or the ss towards
Change in Storage	implementing the Pl	an, including the ontent:	implementation of p	rojects o	or management actions sir	nce the previo	us annual report. There	are two options
Monitoring Network Module	Option 1. Review yo	our projects and	management actions	from th	ne PMA Module. Provide u	pdates as nee	eded directly within the t	able by clicking
PMA Module	the icon in the "Upda Option 2 Provide vo	ate" column. At le	east 1 implementatio	n update atch Imr	e per water year is require	d for each PM	IA. preadsheet can be dow	nioaded At least
					1			
GSP Annual Report	1 implementation up	date per water y	ear is required for ea	ICH PINA				
GSP Annual Report	1 implementation up Option 1	date per water y	ear is required for ea	son Piwa				
GSP Annual Report GSP Annual Report Submittal	1 implementation up Option 1	date per water y	ear is required for ea	ion PiviA	•			
GSP Annual Report GSP Annual Report Submittal	1 implementation up Option 1 PMAID	PMA Name	tear is required for each of the second s	¢	GSP(1)	ŧ	# of Updates during	Action
GSP Annual Report	1 implementation up Option 1 PMA ID 5-029 PMA 1	PMA Name PMA 1	Lead GSA(e) SGMA GSA	¢	GSP(0) 0-000 SGMA GSP	¢	# of Updates during	Action
GSP Annual Report	1 implementation up Option 1 <u>5-029 PMA 1</u> <u>5-029 PMA 4</u>	PMA Name PMA 1 PMA 4	Lead GSA(a) SGMA GSA SGMA GSA	¢	GSP(s) 0-000 SGMA GSP 0-000 SGMA GSP	¢	# of Updales during	Action
GSP Annual Report	1 implementation up Option 1 <u>PMA ID</u> <u>5:029 PMA 1</u> <u>5:029 PMA 4</u> <u>5:029 PMA 5</u>	PMA Name PMA 1 PMA 4 PMA 5	Leed GSA(e) SGMA GSA SGMA GSA SGMA GSA	¢	G3P(e) 0-000 SGMA GSP 0-000 SGMA GSP 0-000 SGMA GSP	¢	# of Updales during 1 1	Action G
GSP Annual Report	1 implementation up Option 1 <u>PMA ID</u> <u>5 029 PMA 1</u> <u>5 029 PMA 4</u> <u>5 029 PMA 5</u> <u>5 029 PMA 3</u>	Alter per water y PMA Name PMA 1 PMA 1 PMA 4 PMA 5 PMA 3	Lead GSA(a) SGMA GSA SGMA GSA SGMA GSA SGMA GSA SGMA GSA	¢	G3P(0) 0-000 SGMA GSP 0-000 SGMA GSP 0-000 SGMA GSP 0-000 SGMA GSP	¢	# of Updales during 1 1 1 0	Action C C
GSP Annual Report	1 implementation up Option 1 <u>5029 PMA 1</u> <u>5029 PMA 4</u> <u>5029 PMA 5</u> <u>5029 PMA 3</u> <u>5029 PMA 2</u>	PMA Name PMA Name PMA 1 PMA 1 PMA 4 PMA 5 PMA 3 PMA 2	Lead GSA(e) SGMA GSA SGMA GSA SGMA GSA SGMA GSA SGMA GSA SGMA GSA	¢	GSP(e) 0-000 SGMA GSP 0-000 SGMA GSP 0-000 SGMA GSP 0-000 SGMA GSP 0-000 SGMA GSP	\$	# of Updalee during 1 1 1 0 1	Action C C C C

Figure 56. A screenshot showing the table in Option 1. An entry in the "# of Updates during WY" column showing a "1" is highlighted for Step 4. This indicates that the Implementation Update has been submitted.



5. After you submit an update through this table, you can view the update on the PMA's page. You can navigate to the page by clicking the **hyperlink** in the "**PMA ID**" column. The PMA's page will open in a new tab.

GW Extraction Methods							
Surface Water Supply	Optional: This sec	ction is optional	for the WY 2024 Annu	ual Report. This section will be re	equired starting	g in the WY 2025 Annual Re	eport.
Total Water Use Change in Storage	Follow the steps belo basin/subbasin. Per 2 implementing the Pla	ow to import imp 23 CCR § 356.2 an, including the	elementation updates to 2(c), in the Annual Rep implementation of pro	o the projects and management ort submittal, the Agency is requ ojects or management actions si	actions includ uired to provide nce the previor	ed in the PMA Module for the a description of progress t us annual report. There are	he towards two options
Monitoring Network Module	for submitting this con	intent:	management actions f	from the PMA Module, Provide I	indates as nee	ded directly within the table	a by elicking
Information of the second second	the icon in the "Updat	ite" column. At le	east 1 implementation	update per water year is require	d for each PM	A.	a by choicing
PMA Module	Option 2 Provide you	ur implementatio	on updates via the Bat	ch Import Template spreadshee	t. A pre-filled s	preadsheet can be downloa	aded. At least
COD Annual Decent	1 implementation upd	date per water y	year is required for eac	h PMA.			
GSP Annual Report							
GSP Annual Report	Ontion 1						
GSP Annual Report GSP Annual Report Submittal	Option 1						
GSP Annual Report Submittal	Option 1						
GSP Annual Report Submittal	Option 1	PMA Nome	+ Lead GSA(a)	4 GSP(8)	¢	# of Updates during WY	\$ Action
GSP Annual Report Submittal	Option 1 PMA ID # 5-029 PMA 1	E	Lead GSA(1) SGMA GSA	GSP(s) 0-000 SGMA GSP	¢	# of Updates during WY	+ Action
GSP Annual Report Submittal	Option 1	5	Lead GSA(s) SGMA GSA SGMA GSA	\$ G\$P(e) 0-000 SGMA GSP 0-000 SGMA GSP	¢	# of Updalee during WY 1 1	+ Action C
GSP Annual Report Submittal	Option 1	5	Lead GSA(s) SGMA GSA SGMA GSA SGMA GSA SGMA GSA SGMA GSA	C3P(e) 0-000 SGMA GSP 0-000 SGMA GSP 0-000 SGMA GSP	¢	# of Updatee during WY 1 1 1	+ Action C C C C
GSP Annual Report Submittal	Option 1	Phase some 5 Phase Phase	Lead GSA(e) SGMA GSA SGMA GSA SGMA GSA SGMA GSA SGMA GSA	CSP(n) 0-000 SGMA GSP	¢	# of Updates during WY 1 1 1 0	Action C' C' C' C' C' C'
GSP Annual Report Submittal	Option 1	Рил. 1000 5 Рил. 3 РИЛ. 2	Lead GSA(e) SGMA GSA SGMA GSA	CSP(s) 0-000 SGMA GSP	\$	# of Updates during WY 1 1 1 1 0 1 1	Action C C C C C C C C C C C C C
GSP Annual Report Submittal	Option 1	Рил зоно 5 Рил 3 РИЛ 2 РИЛ 6	Lead GSA(a) SGMA GSA	CSP(e) 0-000 SGMA GSP 0-000 SGMA GSP	\$	# of Updates during WY	Action © 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0

Figure 57. A screenshot showing the table in Option 1. A hyperlink is highlighted for Step 5 in the "PMA ID" column.

6. Navigate to **Section H** of the PMA page. The Implementation Update that was just submitted through the Annual Reporting Module will be viewable and editable within this section.

						*
G Addition	al Documents					>
H Implem	entation Updates					~
+ New Implement	ation Update			Search:		
Water Year	Updates		Updated By 👙	Submitted Date 🚽	Files	
2021	[Example] Construction began for the PMA	Construction	Reanna Ennis	03/10/2025 12:28:28		C © Î
2020	[Example] Permits are being secured for the PMA	Planning	Reanna Ennis	03/10/2025 12:28:13		Col
2019	[Example] The PMA is conceptual and will be implemented when funding is secured	Conceptual	Reanna Ennis	03/10/2025 12:27:57	h.	601
L						

Figure 58. A screenshot showing Section H of a PMA page. The Implementation Update submitted through the Annual Reporting Module is highlighted for Step 6.



5.2.2. Option 2 – Batch Importing Implementation Updates in the Annual Reporting Module

1. Navigate to "**Option 2**" within PMA Module section of the Annual Reporting Module.

Select an option for downloading the batch update spreadsheet. The downloaded spreadsheets are partially **pre-populated** with information from the PMAs in the basin/subbasin. The selection that the User makes will determine which PMAs are included on the spreadsheet. Make a selection between the following options:

The first option, "All PMAs associated with the basin or subbasin", will download a spreadsheet prepopulated with all PMAs associated with the selected basin/subbasin.

The second option, "All PMAs that require an update (# of Updates = 0)", will download a pre-populated spreadsheet with PMAs from the basin/subbasin that do not currently have an associated Implementation Update for the Annual Report's water year. Please note that you can still utilize the "# of Updates during WY" column in the table in "Option 1" to verify the number of updates that each PMA has. If this option is selected, then the only PMAs that are pre-populated within the spreadsheet are the PMAs that have "0" updates in the "# of Updates during WY" column.

	GSP Annual Report Submittal	Option 1						and the second	CONTRACTOR AND
		PMA ID	¢ PMA Name	Lead G SA(8)	\$ G.SP(*)	\$ of Updates during Wi	¢ Action		
		5-029 PMA 1	PMA 1	SGMA GSA	0-000 SGMA GSP	1	G	210000000000	- LOCALDAN
		5-029 PMA 4	PMA 4	SGMA GSA	0-000 SGMA GSP	3	Q		
		5-029 PMA 5	PMA 5	SGMA GSA	0-000 SGMA GSP	0	Q		
		5-029 PMA 3	PMA 3	SGMA GSA	0-000 SGMA GSP	0	G		
		5-029 PMA_2	PMA 2	SGMA GSA	0-000 SGMA GSP	1	G	P- + California	No. an
		5-029 PMA 0	PMA 6	SGMA GSA	0-000 SGMA GSP	0	ß	And the second second	
		Option 2 Step 1. Make a se	lection to populate the e PMAs associated with th PMAs that require an up	xxel template. Then, selec he basin or subbasin. ♥ date (# of Updates = 0). ♥	1	winkcad Excel Template	2		
and the second		Step 2. Populate t Step 3. Upload the	ne PMA Implementation	Updates Batch Import Templ nentation Updates Batch Impo	ate with the required information of the required information of the required information of the required in t	in. mport Data" button.			
				Click to u OR drag file:	upload s here				
- CARLAND		Import Step 4. After succe	essfully uploading the sp	readsheet, the "# of Updates	during WY" column in the Opt	on 1 table will populate.	i		

2. Once you have made your selection, click "Download Excel Template".

Figure 59. A screenshot of the PMA Module page within the Annual Reporting Module. The page is scrolled down to "Option 2". The spreadsheet download options are highlighted for Step 1. The "Download Excel Template" button is highlighted for Step 2.



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3. For instructions and information about using the downloaded batch import spreadsheet, **follow Steps 5 through 9** in <u>Section 5.1.2</u>. Ensure that macros are enabled so that the spreadsheet can be uploaded correctly (See <u>Section 3.1.3</u> for instructions on enabling macros).

Come back to this step once you have completed filling out the batch import template.

4. Once you have completed the batch import spreadsheet, make sure to **close the spreadsheet**. Return back to the **Annual Reporting Module's PMA Module section**.

5. Drag and drop or click to upload the completed spreadsheet in the designated upload box.

6. Click "Import".



Figure 60. A screenshot of "Option 2" in the Annual Reporting Module's PMA Module Section. The designated upload box is highlighted for Step 5. The "Import" button is highlighted for Step 6.

6. If you have errors on your uploaded spreadsheet, an "**Error(s)**" popup box will appear. This means that no Implementation Updates were imported. Fix the indicated errors on your spreadsheet and reupload the corrected spreadsheet.

1	Plan + CMA	Rasin Central Management VAI	I FY (Central	R	0	G
	Error(s)		×	VER	0	G
	Import unsuccessful Row 2					
	 > The Water Year field is required. Row 3 > Water Year "XYY" is invalid. 			VER	0	G
	> The Water Year field is required.			VER	0	G
			Close		0	G
	CMM	Area GSA Mai	nagement Area	6	<u>) </u>	
Sh	owing 1 to 25 of 41 entries				ious 1 2	Next

Figure 61. A screenshot of the "Error(s)" popup box, indicating which rows in the uploaded spreadsheet contain errors.



7. If there are no errors on your spreadsheet, you will get a "**Success**" popup box indicating that your Implementation Updates have been uploaded successfully.



Figure 62. A screenshot of the "Success" popup box, indicating that the Implementation Updates were uploaded successfully.

8. After successfully uploading the Implementation Updates, the number of Implementation Updates will automatically update in the "**# of Updates during WY**" column in the table in **Option 1**.

If you do not see the correct number of updates after successfully submitting a batch import spreadsheet, manually reload the page.

	GW Extraction GW Extraction Methods GI Surface Water Supply	G PMA Module Optional: This sect						
	D Total Water Use Change in Storage Monitoring Network Module G PMA Module	Follow the steps below basin/subbasin. Per 2 implementing the Plar for submitting this con Option 1. Review you the icon in the "Updat Option 2 Provide you	v to import implementation 3 CCR § 356.2(c), in the A h, including the implement tent: r projects and manageme e [®] column. At least 1 imple r implementation updates	n updates to the projects a Annual Report submittal, th ation of projects or manage ent actions from the PMA M ementation update per wate via the Batch Import Temp ind for each BMA	nd management actions include e Agency is required to provide ement actions since the previou odule. Provide updates as need er year is required for each PMA late spreadsheet. A pre-filled sp	d in the PMA Module for the a description of progress tor s annual report. There are to led directly within the table I c readsheet can be download	wards wo options by clicking ed. At least	
	H GSP Annual Report	Option 1	ate per water year is requ	red for each PMA.				
		PMA ID 5-029 PMA 0	 PMA Name PMA 6 	\$ Lead G \$A(a) 'BGMA GBA	\$ GSP(0) 0-000 SGMA GSP	🔹 # of Updates during V	8	
		5-029 PMA 1 5-029 PMA 2	PMA 1 PMA 2	SGMA GSA	0-000 SGMA GSP	1	G	
- AND		5-029 PMA 3	PMA 3	SGMA GSA	0-000 SGMA GSP	*	G	
		5-029 PMA 5	PMA.5	SGMA GSA	0-000 SGMA GSP	1	G	
		Showing 1 to 8 of 8	entries			Previous 1	Next	

Figure 63. A screenshot of the table in "Option 1". The "# of Updates during WY" column is highlighted for Step 8. All of the PMAs have 1 Implementation Update, some of which were added by using the batch import tool in "Option 2".



9. After submitting Implementation Updates through the batch import tool, you will be able to see the Implementation Updates in **Section H** of the respective PMAs.

G Addi	tional Documents					>
H Impl	ementation Updates					~
+ New Imp	lementation Update			Search:		
Water Y	ear 👌 Updates	⇔ Status ≑	Updated By	Submitted Date 🗸	Files	Action(s)
2021	[Example] Construction began for the PMA	Construction	Reanna Ennis	03/10/2025 12:28:28		Cot
2020	[Example] Permits are being secured for the PMA	Planning	Reanna Ennis	03/10/2025 12:28:13		COÌ
2019	[Example] The PMA is conceptual and will be implemented when funding is secured	Conceptual	Reanna Ennis	03/10/2025		C @ Ê
					_	

Figure 64. A screenshot showing Section H of a PMA page. The Implementation Update submitted through the batch import tool in "Option 2" is highlighted for Step 9.



6. Granting Users Permissions to Projects and Management Actions

The **Projects and Management Actions Module** provides two ways to assign permissions to Users to allow them access to PMAs.

Users can be provided with general access to all PMAs associated with the Lead GSA by being granted permissions to the Lead GSA. Users that are granted permissions to the GSA will be able to access various data on the SGMA Portal such as access to previously submitted materials by the GSA (GSP, Annual Reports, etc.), access to the materials on the Monitoring Network Module, and the ability to submit new materials on behalf of the GSA. The process of granting a User access to a GSA is provided in <u>Section 6.1</u>.

Users can be provided access to specific PMAs without being granted full access to the Lead GSA. The process of granting a user access to specific PMAs is provided in <u>Section 6.2</u>.

6.1 Assigning a User Permissions to the Lead GSA

1. While logged into the account of a User with "Admin" permissions to the Lead GSA, hover over the "GSA" option in the menu to open the GSA dropdown list. Click "My GSAs" to be navigated to the "My GSA Formation Notices" page.



Figure 65. Screenshot of the SGMA Portal. The GSA dropdown menu is open highlighting the "My GSAs" option.

2. Click the three dots under the "Action(s)" column for the desired GSA. Select "Assign Permission" from the drop-down menu to be navigated to the "GSA User & Access" page.

	Department of Water Resource	es	Welcome, SGMA Test! 04/18/2024 O <u>Sign Out</u> O <u>Feedback</u> My Profile	
	A Home ≡ GSA ≡ GSP ≡ Atternatives	C Adjudicated Areas C Basin Modification	C Monitoring Network 13 File Transfer	
the second second second second	My GSA Formation Notices			
	+ Submit New GSA			
	GSA Name (Basin/Status)	♦ DWR GIS Modifications ♦ Status	Modified or Withdrawn? Modified \$ Action(s)	No. of Concession, Name
	SGMO Test 5-089 YOSEMITE VALLEY	POSTED	06/22/2022 3.41PM	ŝ hdraw wu Logs
	Showing 1 to 1 of 1 entries		As As Line Ma	w DWR Modified GIS sign Permission In Processor to View 2

Figure 66. Screenshot of the "MY GSA Formation Notices" page. The drop-down menu under "Actions" is open with the "Assign Permission" option highlighted.



3. In the "**Grant Access**" box, begin typing the name of the specified User to be added to the GSA. Click the name of the specified User when it appears.

	0.Gov	Depar SGM	tment of A PORT	Water Resourc	ces			Welcome, SGMA Te O Sign Out O Fee	sti 04/16/2024 sdbask L <u>My Profile</u>	
	A Home	≡ GSA	≣ GSP		C Adjudicated Areas	C Basin Modif	cation C	C Monitoring Network	13 File Transfer	
	Home / GSA/	Permissions								
and the second sec	GSA U	ser & A	ccess -	- SGMO TO	est					Nill on the second statement of the
	L Curren	It GSA U	sers							and the second second
	Name		•	Email		¢ Phone	(Ø Type	¢ Action(s)	Contraction of the second second
	SGMA Test					918-1	1-1111	ADMIN	•	The second second
	+ Grant	Access								3
	To grant	or change	user access	to the GSA, search	and select the user.					
	SGMO	l								
Mar and	SGMO	Test (DV	VR - SGMC) Test) GSPSub	mittal@water.ca.gov					CHOICE .
	_									
and the second										
a start										the second second second
Constanting to										
ART & STALLA										

Figure 67. Screenshot of the "GSA User & Access" page. The "Grant Access" box is highlighted.

4. The "Grant User Access Confirmation" popup box will appear. Choose one of the options to grant the specified user the desired level of access to the GSA.

	COV SGMA PO COV SGMA PO Homo = GSA = 0 Homo SGA User & Acce	Grant User Access Confirmation re you sure you want to grant SOMO Test access to the GS Grant ADMIN Access Grant	A? EDITOR Access Cancel	m, SGMA Test 04192024 M I G Feedback 1 My Profile Iwork 13 File Transfer	
	L Current GSA Users				and the second second
and the second s	Name (Email 🔶	Phone \$	Type	AND DO THE REAL PROPERTY AND DO THE REAL PROPE
	SOMA Test		918-111-1111	ADMN 😳	- Part -
	+ Grant Access				The second start
	To grant or change user acce	ss to the GSA, search and select the user.			and the second second
	SGMO Test (DWR - SGMO	Test) GSPSubmittal@water.ca.gov			
	If you could not find the user, p	lease <u>click here</u> to create a new user.			SUPPORT STATE

Figure 68. Screenshot of the "GSA User Access Confirmation" popup box. The access options are highlighted.



5. A "Success" popup box will appear when the User is successfully assigned permissions to the GSA.

	of Water Resources	Welco	me, SGMA Test 04/16/2024	
Home EGSA E Home / GSA / Permissions	GMO Test has been granted access to the GSA.	Ok	shvork 123 File Transfer	the transferred
 Current GSA User	Email (Phone \$	5 Action(s)	And And And And And
SGMO Test	GSPSubmittal@water.ca.gov	(918) 111-1111	ADMN 😳	and the second
Grant Access To grant or change user acce Search for user	ss to the GSA, search and select the user			
If you could not find the user, p	iease <u>click here</u> lo create a new user.			and the second se

Figure 69. Screenshot of the "Success" popup box that appears after a User is successfully assigned permissions to the GSA.

6. The User will now appear in the Permissions table for the GSA on the "GSA User & Access" page. This User will now have access to all PMAs that are associated with the GSA.



Figure 70. Screenshot of the GSA User & Access page, highlighting the newly added User in the table.



6.2 Assigning a User Permissions to a Specified PMA

1. Starting from the "My Projects/Management Actions" page, navigate to the PMA that will have permissions assigned to it. Go to the "Action(s)" column and click the three dots. In the drop-down menu, click "Permissions".

		rtment of Water Re IA PORTAL	sources		Weld 이 달	me. (<u>an Out</u> 127 <u>Feedback</u>)6/27/2024 1 <u>Му Profile</u>	
	A Home ≡ GSA ≡ GSP	E Alternatives C	Adjudicated Areas	C Basin Modification	C Monitoring Network	17 File Transfer		
	Home / My Projects							
Name Carbon and		My Pr	ojects /	Managem	ent Actions			CRASHING STREET, STREE
	+ New Project 🗵 Import Projects	Export Projects				Search:		and the second
	Project Name) GSA) Bas	sin / Subbasin 🍦 GSP(s)	Status (Updated By	Last Updated 🍵	Action(s)
	G Draft				SUBMITTED		08/27/2024 09:56:03	Ci Edit
	Showing 1 to 1 of 1 entries						Previous 1	Ne Pres

Figure 71. Screenshot of the "My Projects/Management Actions" page. The dropdown menu under the "Action(s)" column is open, highlighting the "Permissions" option.

2. The "Project – Users & Permissions" page will load. Click the "Grant New User" button.

	C.Gov	Department of SGMA PORT	Water Resourc	es		Welcome, O <u>Sign Out</u> O <u>Fee</u>	04/16/2024 dback L My Profile	
	n Home ≡ C	SA ≣ GSP		Adjudicated Basins	C Basin Modification	C Monitoring Network	13 File Transfer	
	Home / All Projects (Admin) / I	Project — Users & P	Permissions					and the second second
and the same the	-		Proje	ct — Users &	& Permission:	S		angeres der
	+ Grant New User			Test Proje	ect 1			
	Name	· Email (Usernar	me)		•	Permission Type \$	Access DT 🛛 👙	Action
				No data available	in table			
	Showing 0 to 0 of 0 entries				2.45 2.5 2.5 2.5 2.5 2.5 2.5 2.5 2.5 2.5 2.	N.S.P.	Previous	Next

Figure 72. Screenshot of the "Project – Users & Permissions" page. The "Grant New User" button is highlighted.



3. The **User Permission** form will open. Type the User's name that will be granted access into the "**User**" field and select the permission type for the User in the "**Permission Type**" field.

4. Click "Save".

	User Permission Form	Welcomp, 1 X d (C Feedback) & b	2024 My Profile
nhome ≡ GSA ≡ 0	• User	Permission Type Network 13 File 1	Transfer
Home / All Projects (Admin) / Project Use	Start typing to search for user *	Select an option V	
	Required fields	H Save Cancel	
+ Grant New User			
Name A Email (U	semame)		DT Action
	No data available in table		
Showing 0 to 0 of 0 entries			Previous Next

Figure 73. Screenshot of the User Permission Form. The "User" and "Permission Type" fields are highlighted for Step 3. The "Save" button is highlighted for Step 4.

5. After the User is successfully granted permissions to the specified PMA, a "**Success**" popup box will appear.

	0.Gov	Departme SGMA F	nt of Water Resources	Welcom Chica X	e, i 04/16/20 Out I @ Eeedback I & Mi		
	A Home	EGSA ⊟ / Project — Ut	Permission updated successfully.	OF	Network 13 File Tr	ansfer	HUNING
	+ Grant New User		Test Project 1		5		
the second	Name	* Email (Use	mame)	Permission Type	Access DT (Action	C.S.
	SGMO Test	GSPSubmi	tal@water.ca.gov	ADMIN	04/16/2024 03:18 PM	D Revoke Access	
	Showing 1 to 1 of 1 entries				Prev	ous 1 Next	

Figure 74. A screenshot of the "Success" popup box, which appears after a User is successfully granted permissions to a PMA, is highlighted.

6. The User's information will appear in the "**Project – Users & Permissions**" table for the specified PMA. The User will now have the ability to view, edit, and provide updates to the specified PMA.



Figure 75. Screenshot of the "Project – Users & Permissions" page, with the newly added User in highlighted in the table.



Sustainable Groundwater Management Office