Mitigation Land Package Document File Naming Convention

Why does CDFW need a file naming convention for mitigation land package documents?

When reviewing land transfer-related documents for habitat conservation, the sheer volume of documentation can be staggering. Recently, CDFW completed land package review of a multi-parcel mitigation project which involved over 1370 computer files, organized into 267 different folders. Often, valuable review time is spent trying to determine which file is what product or document, and what version of that product or document, or even just trying to locate a particular file. To help reduce that time spent determining and locating, CDFW's Habitat Conservation Planning Branch (HCPB) is implementing a file naming convention for the Mitigation Real Property Document Analysis (MRPDA) process. This will simplify the process of determining which file is which, and where it is located. The naming convention will also keep most file names under 40 characters. This helps prevent difficulties with accessing files, due to the deep folder nesting and server transfers for some of these files. Please note that this convention does not apply to many of the documents submitted for banking. It is only for the land package documents which will be reviewed by MRPDA staff. If you have questions, please contact your CDFW region representative.

File Naming Convention

The convention will consist of at least five parts but no more than six. Most of these parts will require abbreviations. More on that further below.

- The **first part** will identify which **CDFW region** is responsible for approving the project.
- The **second part** will identify the actual **project name**.
- The **third part** will identify the type of **product/document**.
- The **fourth part** will identify the **version** of the specific product/document.
- The **fifth part** will identify the computer **file type**.
- In some cases, the project will have multiple subparts. In those cases, the **sixth part** will identify the project **subpart** (or **parcel**).

The standard five parts will always be in linear order in the file name, ending with the fifth part – the file type – being the standard computer "extension" (e.g. pdf, jpg, docx).

When the **sixth part** is needed, it will be inserted into the filename in between the normal **second and third parts**: the project name and the document type.

To keep file names within the maximum number of characters, "Region" will be abbreviated "R"; project names will be restricted to 9 characters; document types will be limited to 8 characters; versions will be identified by date (more on that later); file type is already abbreviated; subpart or parcel will be no more than 4 characters.

The **basic format** will look like this:

R#_Proj_name_Doc_type_year-mo-da.ext

Here's an example:

R3_Vio_Ranch_BIE_2024-02-26.pdf

Broken out into its parts without abbreviations, it would look like this:

1) *Region 3* ***2)*** *Violet Ranch* ***3)*** *Boundary/Improvements/Encumbrances Map* ***4)*** *version completed on February 26, 2024* ***5)*** *portable document format*

A **multi-parcel project** would look like this:

R#_Proj_name_Pcl#_Doc_type_year-mo-da.ext

An example:

R6_Des_Bloom_OMP1_Ex_B_2024-03-05.pdf

Broken out into its parts:

1) *Region 6* ***2)*** *Desert Bloom* ***2a)*** *Ontario Mountain Preserve Parcel #1* ***3)*** *Exhibit B (Conservation Easement Legal Description)* ***4)*** *version completed on March 5, 2024* ***5)*** *portable document format*

Note that these formats have no blank spaces. All words, abbreviations, etc. are separated by either an underscore (_) or a hyphen (-). This also helps prevent difficulties with accessing files.

Also, note that the date is always year first, then month, then day. This ensures that when the folder is sorted alphabetically by name, the versions automatically appear in age order from oldest to newest. The year must always be four digits, the month must always be 2 digits, and the day must always be two digits for this to work correctly, ex: 2024-01-02 = January 2, 2024. For this to work correctly, each successive version of a product or document should be named identically except for the date. For example:

R4_Blu_Prkwy_TCR_CE_2023-07-05.pdf
R4_Blu_Prkwy_TCR_CE_2023-08-08.pdf

The reason the file extension is part of the naming convention is because the BIE map should be submitted in three formats: the pdf version, the CADD version, and the Google Earth version. These would all have identical names, but the file extension would differentiate them. Here is an example:

R3_Alt_East_BIE_2024-08-01.pdf	portable document format
R3_Alt_East_BIE_2024-08-01.dwg	AutoCAD drawing
R3_Alt_East_BIE_2024-08-01.kmz	Google Earth keyhole markup zip

Folder Structure

In addition to this naming convention, CDFW has implemented a revised folder structure to consolidate the land survey products into easier-to-find, consistent, file locations. This structure can be used by project proponents/consultants to organize the files for fileshare transfers. A separate document describes the structure and how to use it. Folder structure instructions.docx

Expected File List

Finally, here is a list of the various documents that are anticipated to be submitted for the mitigation real property document analysis process, along with their 8-character maximum abbreviations:

Document Name	**Abbreviation**
Access Document	ACC_DOC
Access Easement	ACC_ESMT
Biological Report	BIO_REP
Boundary/Improvements/Encumbrance map	BIE
Conservation Easement	CE
Digital Closing Package	DCP
Draft Management Plan	DMP
Draft Subordination Agreement	DSA
Escrow Instruction	EI
Exhibit A (full parcel legal description)	EX_A
Exhibit A-1 (full parcel plat map)	EX_A-1
Exhibit B (partial parcel legal description)	EX_B
Exhibit B-1 (partial parcel plat map)	EX_B-1
Grant Deed	GD
Grantor's Authority	GA

Document Name	Abbreviation
Habitat Management Land Title Information	HMLTI
Interim Management Plan	IMP
Keyhole Markup Zip file	KMZ
Long-Term Management Plan	LTMP
Mineral Risk Assessment Report	MAR
Phase I Environmental Site Assessment Report*	PHASE_I
Phase I Environmental Site Assessment Report*	ESA
Preliminary Title Report	PTR
Pro Forma Title Report	PROFORMA
Signatory Authorization	SA
Traverse Closure Report for Conservation Easement	TCR_CE
Traverse Closure Report for Electric Easement^	TCR_ELEC
Traverse Closure Report for Gas Easement^	TCR_GAS
Traverse Closure Report for Road^	TCR_ROAD

***** *Either abbreviation is acceptable.*

^ *These are examples of types of Traverse Closure Reports. Some projects may not have these, or some may have different types of Traverse Closure Reports than these.*

Major Exception

There is one specific type of document that should not follow the above convention. Copies of recorded documents and record maps, whether submitted as title exception documents, referred to in the title report legal description, or as supporting documents for the Land Survey Products, should be named according to their respective recording information. Each document should be provided in a separate PDF file which should be named either by the Instrument or Document Number or by the Book Number, Book Name (abbreviated if possible), and Page Number. They should still follow the guidelines above regarding no spaces in the name of the file. If the project is in multiple counties, please include the county name (abbreviated) in the file name. Examples follow:

2024-0007895
Book_4500_O.R._Pg_751
Book_45_PM_Pg_25
Book_27_Patents_Pg_63
SB_Book_13_ROS_Pg_89

Naming Responsibility

HCPB is making efforts to streamline and expedite the review process. This file naming convention will be a substantial help with that. However, as important as this convention is, it is even more important that file names are not changed by CDFW staff. Land Survey documents and some of the other Mitigation Property Review items are a special class of products which carry legal weight, if they have not been altered by subsequent users. Therefore, the appropriate file names should be created by the project proponents and/or their consultants. CDFW staff should request that the proponents/consultants follow this convention and provide this document to them, but if they choose not to follow the convention, CDFW staff will review the products without changing the names. As explained in the beginning of this document, not following the naming convention may delay the review process.

Thanks

To both CDFW staff and the project proponents, HCPB MRPDA would like to thank you in advance for your assistance to our workload management by implementing this convention.