

LODI RULES Online Self-Assessment User Guide



Login

Go to the following web location:

<http://lodirules.protectedharvest.org>

Enter your username and password and click **Login**. If you are a first-time user, you will be asked to change your password. **If you have lost or forgotten your username or password, click on the “Retrieve Password” link on the screen to retrieve your password by username, or contact support by email certification@protectedharvest.org or by phone (831) 706-2097.**



LODI RULES FOR SUSTAINABLE WINEGROWING
ONLINE SELF-ASSESSMENT PLATFORM



HOME



Welcome to the LODI RULES
online platform. Access
Grower Resources here.

To access a previous edition,
[Read More](#)

LOGIN

Username:

Password:

Login

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Assess Vineyards:



To enter an assessment for one of your certification units (i.e., ranch, vineyard, or blocks), click **Self Assessments** on the navigation bar or **My Self-Assessments** from the Quick Links.

LODI RULES FOR SUSTAINABLE WINEGROWING

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Self-Assessments Clone Data Reports

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Your organization's structure will appear on the left.

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Self-Assessments Clone Data Reports

MY ASSESSMENTS

Year: 2024

Select the Vineyard/Block or Winery (in blue) that you want to assess.

Organizations

- AA Oakleaf Vineyards (demo only)
- Oakleaf Vineyards
 - Example
 - Grand Oak Ranch (25.00)
 - Home Ranch (84.25)
 - Pettier Ranch (42.00)
 - River Oaks Ranch (20.00)
 - Vernal Pool Ranch (36.00)

Select a certification unit (vineyard/ranch/block) that you want to assess; the LODI RULES chapters and Standards will automatically load on the right.



CHAPTER

Year: 2024

Organizations

- AA Oakleaf Vineyards (demo only)
 - Oakleaf Vineyards
 - Example
 - Grand Oak Ranch (25.00)
 - Home Ranch (84.25)**
 - Pettier Ranch (42.00)
 - River Oaks Ranch (20.00)
 - Vernal Pool Ranch (36.00)

Ch 1. Business Mgmt Ch 2. Human Resources Mgmt Ch 3. Ecosystem Mgmt Ch 4. Soil Mgmt Ch 5. Water Mgmt Ch 6. Pest Mgmt

1. Business Management

LODI RULES Chapters

Chapter Information

Open	Standard	Name	Score	Prereq?	Notes
	1-1	Sustainability Vision			
	1-2	Succession Plan			
	1-3	Management Planning Meetings			
	1-4	Risk Management Plan			
	1-5	Operating Budget			
	1-6	Management Training and Development			
	1-7	Staying Informed With Industry			
	1-8	Neighbor Relations			
	1-9	Energy Management			
	1-10	Alternative Energy Use Bonus Points			
	1-11	Mechanical Operation Efficiency			
	1-12	Disposal of Materials			

Standard

Assessments open in Summary-mode. To access the detailed information, **which includes instructions for each Standard, where applicable**, click the **Open** icon to the left of the Standard number. Assess your vineyard by selecting the most appropriate answer for each of the Standards in each chapter.

CHAPTER

Year: 2024

Organizations

- AA Oakleaf Vineyards (demo only)
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 - Example
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 - Home Ranch (84.25)**
 - Pettier Ranch (42.00)
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Ch 1. Business Mgmt Ch 2. Human Resources Mgmt Ch 3. Ecosystem Mgmt Ch 4. Soil Mgmt Ch 5. Water Mgmt Ch 6. Pest Mgmt

1. Business Management

Chapter Information

Open	Standard	Name	Score	Prereq?	Notes
	1-1	Sustainability Vision			
	1-2	Succession Plan			
	1-3	Management Planning Meetings			
	1-4	Risk Management Plan			
	1-5	Operating Budget			
	1-6	Management Training and Development			
	1-7	Staying Informed With Industry			
	1-8	Neighbor Relations			
	1-9	Energy Management			
	1-10	Alternative Energy Use Bonus Points			
	1-11	Mechanical Operation Efficiency			
	1-12	Disposal of Materials			

Click Open icon.

You will see the expanded mode with details of the questions and answers as they appear in the [LODI RULES for Sustainable Winegrowing Certification Standards, Fourth Edition Binder](#).

Choose the button below the appropriate answer and either click **Save** at the bottom of the page or the **Next/Save** button in the upper right of the page to go to the next Standard.



CRITERIA

Year: 2024

- Organizations
 - AA Oakleaf Vineyards (demo only)
 - Example
 - Grand Oak Ranch (25.00)
 - Home Ranch (84.25)**
 - Pettier Ranch (42.00)
 - River Oaks Ranch (20.00)
 - Vernal Pool Ranch (36.00)

Ch 1. Business Mgmt Ch 2. Human Resources Mgmt Ch 3. Ecosystem Mgmt Ch 4. Soil Mgmt Ch 5. Water Mgmt Ch 6. Pest Mgmt

1. Business Management > 1-1. Sustainability Vision

Previous/Save **Select your answer.** **Navigate using Next/Save button to go to next Standard.** Expand All | Collapse All Next/Save

Standard	Yes	No
1-1. Sustainability Vision A farming operation representative attended a Lodi Winegrape Commission workshop for developing and writing a sustainable management vision plan for the farm AND the farming operation has a written vision statement . (6 points)	6 points	0 Points
Your Assessment Previous Assessment 2023	<input type="radio"/>	<input type="radio"/>

My Notes

Repeat for all Standards in all chapters. For the last question of each chapter, either click **Next/Save** or scroll to the bottom of the screen and click **Save**. Navigate between chapters by clicking on the Chapter tabs. When complete, the progress indicators become green checks. **Answer N/A if not applicable to ensure a complete assessment.**

Adding Notes to a Standard

You may want to add a note for an individual Standard for future reference or to communicate with your auditor. Examples of notes might be the approach that was taken for prescriptive spraying or a brief description of a Teambuilding Sustainability activity that you held. The notes will appear on the chapter summary page. Notes can be duplicated from one year or location to another year or location using the **Clone-feature**.

Year: 2024

- Organizations
 - AA Oakleaf Vineyards (demo only)
 - Example
 - Grand Oak Ranch (25.00)
 - Home Ranch (84.25)**
 - Pettier Ranch (42.00)
 - River Oaks Ranch (20.00)
 - Vernal Pool Ranch (36.00)

Ch 1. Business Mgmt Ch 2. Human Resources Mgmt Ch 3. Ecosystem Mgmt Ch 4. Soil Mgmt Ch 5. Water Mgmt Ch 6. Pest Mgmt

1. Business Management

Chapter Information

Open	Standard	Name	Score	Prereq?	Notes
	1-1	Sustainability Vision	<input type="text"/>	<input type="text"/>	Notes appear here:
	1-2	Succession Plan	<input type="text"/>	<input type="text"/>	
	1-3	Management Planning Meetings	<input type="text"/>	<input type="text"/>	
	1-4	Risk Management Plan	<input type="text"/>	<input type="text"/>	
	1-5	Operating Budget	<input type="text"/>	<input type="text"/>	
	1-6	Management Training and Development	<input type="text"/>	<input type="text"/>	
	1-7	Staying Informed With Industry	<input type="text"/>	<input type="text"/>	
	1-8	Neighbor Relations	<input type="text"/>	<input type="text"/>	
	1-9	Energy Management	<input type="text"/>	<input type="text"/>	
	1-10	Alternative Energy Use Bonus Points	<input type="text"/>	<input type="text"/>	
	1-11	Mechanical Operation Efficiency	<input type="text"/>	<input type="text"/>	

To add a note, you must be in the Expanded-mode, then navigate down to the **My Notes** section to enter text, then click **Save** at the bottom of the page.



Year: 2024

Organizations

- AA Oakleaf Vineyards (demo only)
 - Example
 - Grand Oak Ranch (25.00)
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 - River Oaks Ranch (20.00)
 - Vernal Pool Ranch (36.00)

Ch 1. Business Mgmt Ch 2. Human Resources Mgmt Ch 3. Ecosystem Mgmt Ch 4. Soil Mgmt Ch 5. Water Mgmt Ch 6. Pest Mgmt

1. Business Management > 1-1. Sustainability Vision 1 of 21

Previous/Save Next/Save

My Assessment

Standard	Yes	No
1-1. Sustainability Vision A farming operation representative attended a Lodi Winegrape Commission workshop for developing and writing a sustainable management vision plan for the farm AND the farming operation has a written vision statement . (6 points)	6 points	0 Points
Your Assessment	<input type="radio"/>	<input type="radio"/>
Previous Assessment 2023	<input checked="" type="radio"/>	<input type="radio"/>

My Notes

Save

Useful Tips for Completing the Assessment

- You do not have to complete a chapter in one sitting. You can complete as many Standards as you want, log out, and continue by logging in again to continue where you left off.
- Look for instructional notes under the green Standards bar when responding.
- There will occasionally be instructions to answer N/A if the question does not apply to your ranch/vineyard. For example, in Ch. 2 Human Resources Management, if you don't have employees you are instructed to **answer all questions with N/A**.
- Each chapter should have a green check when completed.**
- If you selected the wrong answer for a Standard, you can modify your answers after you have entered them the first time until the Online Self-Assessment closing date, as noted in the LODI RULES Certification Calendar available at lodigrowers.com/standards.




Clone Data



Once you have completed an assessment on one of your vineyard blocks, you can copy answers with the clone-feature. This will copy saved assessment data to other vineyard blocks to minimize the amount of data entry in subsequent assessments. **Note: Your first assessed vineyard block should be the most representative of your growing practices.**

Follow the steps below to clone the assessments for your vineyards. After you have cloned assessment data to a new vineyard block, you should make any necessary edits to your responses on that vineyard for Standards that are different based upon differences in farming practices, geography, or infrastructure (e.g., irrigation systems).

To clone an assessment, click on **Clone Data** on the navigation bar or **Clone Self-Assessments** from the Quick Links.




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Year / Type	Organization	Document
2022 Certificate	AAA Vineyards DEMO	Abba Vineyards 2023 LR Certificates.pdf

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Cloning Option 1: Select Vineyard Blocks and Chapters to Clone

Choose which vineyard blocks and assessments to clone. This option copies data from a selected vineyard block to others.


- Click the first option as shown below.
- Click NEXT.


CLONE ASSESSMENTS

The Clone Assessments tool allows you to copy and paste your assessment answers from one vineyard to another. Follow the steps below to clone the assessments for your vineyards, then review and make any changes necessary to your assessment answers afterward.

Cloning Options

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

☒  Choose which vineyards and assessments to clone. This option copies data from the selected vineyard to other(s).

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

REVIEW ASSESSMENT QUESTIONS

NEXT >

- Choose the SOURCE organization, vineyard block and year that you want to clone. **Note: This is the vineyard block from which you are copying assessment answers.**
 - Organization: Click the drop-down arrow and choose the Organization.
 - Vineyard: Click the drop-down arrow and choose the vineyard block.
 - Year: Click the drop-down arrow and choose the year for the assessment you want to clone.
- Choose the assessment chapters that you want to copy.
 - **Note: Each assessment chapter will have an icon next to it indicating if all the questions were answered, some of the questions were answered, or none of the questions were answered.**
- Choose the TARGET vineyard block(s) for the current year. **Note: These are the vineyard blocks to which you are pasting assessment answers.**
 - Enterprise: Click the drop-down arrow and choose one or all.
 - Note: You can de-select any vineyard blocks that you do not want to paste assessment data to.
- Click CLONE when you are finished.

Choose which vineyards and assessments to clone

1

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

Organization: AAA Vineyards DEMO
Vineyard: AAA Vineyards Grower Data ...
Crop year: 2023

2

Choose the assessment chapters that you want to copy

- ☐ 1. Business Management !
- ☐ 2. Human Resources Management !
- ☒ 3. Ecosystem Management ✓
- ☐ 4. Soil Management ✗
- ☐ 5. Water Management ✗
- ☐ 6. Pest Management ✗

✓ All valid questions answered ! Some questions answered ✗ No questions answered

3

Choose the *TARGET* vineyard(s) for 2024 crop year
(these are the vineyards to which you are pasting assessment answers)

Enterprise: AAA Vineyards DEMO

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

Deselect All

- ☒ AAA Vineyards DEMO - AAA Vineyards Grower Data 1 (42 acres)
- ☒ AAA Vineyards DEMO - AAA Vineyards Grower Data 2 (18 acres)
- ☒ AAA Vineyards DEMO - AAAA TEST BLOCK (2.5 acres)

< BACK

CLONE

- Cloning replaces assessment data for the current year. Be careful if you have answered any questions for the current year. You will be able to edit assessments after cloning.
 - Note: Processing time to complete cloning depends on the number of vineyard blocks involved.
This may take a few minutes if cloning to multiple vineyard blocks.
- Click CONFIRM.





Cloning replaces chapter data for the current year.
Be careful if you have answered questions for the current
crop year.

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

You will be able to edit assessments after cloning.
Click cancel to exit. Click confirm to proceed.

CANCEL

CONFIRM

- Once you have successfully cloned, you will see this message:



Your data has been successfully saved!
Now that you've cloned, it's time to review your answers.

To review answers, click **Go To Assessments** and select a
vineyard.

RETURN TO CLONING TOOL

GO TO ASSESSMENTS



Cloning Option 2: Clone All Vineyard Blocks and Chapters

Clone assessments for all vineyard blocks from a past year to the current certification year. Use this option if you **have not** started answering assessments for the current year.

Note: This option overwrites the current year with historic data.

- Click the second option as shown below.
- Click NEXT.

CLONE ASSESSMENTS

The Clone Assessments tool allows you to copy and paste your assessment answers from one vineyard to another. Follow the steps below to clone the assessments for your vineyards, then review and make any changes necessary to your assessment answers afterward.

Cloning Options

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



☒ Choose which vineyards and assessments to clone. This option copies data from the selected vineyard to other(s).



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

REVIEW ASSESSMENT QUESTIONS

NEXT >

- Choose the year that you want to clone from. **Note:** This copies data from a selected year to the current year.
- Click CLONE when you are finished.

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

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

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

FROM

Crop year: 2023

TO

Current crop year: 2024

< BACK

CLONE



- Cloning replaces module data for the current year. Be careful if you have answered questions for the current year. You will be able to edit assessments after cloning.
 - **Note: Processing time to complete cloning depends on the number of vineyard blocks involved. This may take a few minutes if cloning to multiple vineyard blocks.**
- Click CONFIRM.

×

Cloning replaces chapter data for the current year.
Be careful if you have answered questions for the current
crop year.

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

You will be able to edit assessments after cloning.
Click cancel to exit. Click confirm to proceed.

CANCEL

CONFIRM

- Once you have successfully cloned, you will see this message:

×

Your data has been successfully saved!
Now that you've cloned, it's time to review your answers.

To review answers, click **Go To Assessments** and select a
vineyard.

RETURN TO CLONING TOOL

GO TO ASSESSMENTS

Reporting: Assessment Status Summary Report



Once you have completed your assessment, you can view the assessment completion status and the assessment scores. The Assessment Status Summary Report lists vineyards, points awarded and points possible, the awarded percentage, and if a vineyard has passed or failed the assessment criteria according to self-reporting (final certification status is not awarded until the self-reported information is audited and Protected Harvest has issued an official certificate). It also shows if the assessment is complete.

From the navigation menu at the top of the screen, click **Reports** from the menu then select **Assessment Status Summary** from the drop-down menu.

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Edit

Assessment Status Summary

Assessment Scores

Action Plan Notes

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Select your **Organization**. You can view the report for all of your vineyard blocks by selecting **"ALL"** next to **Enterprise**. Alternatively, you can view one Enterprise at a time and/or one block at a time. Make sure to select the current year. Select **Generate**.



ASSESSMENT STATUS SUMMARY

Organization: AA Oakleaf Vineyards (demo only) ▼
 Enterprise: <All> ▼
 Year: 2024 ▼

This report works for 2023 and later. Prior years will show incomplete.

Confirm the Organization, Enterprise and Year then click Generate or Export as PDF.

For each vineyard the report shows:

- Points awarded/possible
- Awarded %
- Pass/fail status
- Chapter completion status

 Generate  Export as PDF

You will be able to see in one glance a list of all vineyard blocks, points awarded and points possible, the awarded percentage, and if a vineyard has passed or failed the assessment criteria according to your self-reporting. This report also confirms the completion status of each assessment.



Assessment Status Summary

LODI RULES For Sustainable Winegrowing

Organization: AAA Vineyards DEMO
 Enterprise: AAA Vineyards DEMO
 Year: 2024

	1. Business Management	2. Human Resources Management	3. Ecosystem Management	4. Soil Management	5. Water Management	6. Pest Management	Bonus Points	Total
AAA Vineyards Grower Data 1	43/36	0/0	63/60	64/64	40/40	118/117	10	328/317
	119.4%	0%	105%	100%	100%	100.9%		Total score 103.5%
	Pass	Pass	Pass	Pass	Pass	Pass		Pass
	Complete	Complete	Complete	Complete	Complete	Complete		
AAA Vineyards Grower Data 2	0/36	0/30	6/32	64/64	40/40	0/117	0	110/319
	0%	0%	18.8%	100%	100%	0%		Total score 34.5%
	Fail*	Fail*	Pass	Pass	Pass	Fail*		Fail*
	Incomplete	Incomplete	Complete	Complete	Complete	Incomplete		
AAAA TEST BLOCK	0/36	0/30	6/32	64/64	40/40	0/117	0	110/319
	0%	0%	18.8%	100%	100%	0%		Total score 34.5%
	Fail*	Fail*	Pass	Pass	Pass	Fail*		Fail*
	Incomplete	Incomplete	Complete	Complete	Complete	Incomplete		

*Possible reasons for a Fail:

- One or more chapters are incomplete.
- Earned less than minimum of 50% of total possible points per chapter. Note that the total number of points possible varies depending on vineyard and business characteristics.
- Earned less than minimum of 70% of total possible points over all six chapters or fail one or more chapters.
- Responded "0" to any of the mandatory criteria: 2.1 / 3.3 / 4.1 / 5.1 / 5.6 / 5.7.1 / 5.7.2 / 5.7.3 / 5.7.4 / 5.9 / 6.1 / 6.2 / 6.3 / 6.4 / 6.11 / 6.20 / 6.22 / 6.25 / 6.33
- Did not pass all chapters.



Logging Out



To logout of the application, click on the **Logout** link in the upper right corner.

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Self-AssessmentsClone DataReports 

ASSESSMENT STATUS SUMMARY

Organization: AA Oakleaf Vineyards (demo only) 
Enterprise: <All> 
Year: 2024 

This report works for 2023 and later. Prior years will show incomplete.
Confirm the Organization, Enterprise and Year then click Generate or Export as PDF.

Questions or Comments

Please contact certification@protectedharvest.org. or call Amy Hiser at (831) 706.2097

The Online Self-Assessment System opens on March 1 and closes on May 1 when audits begin.

