CSP Contract Payment Steps for SWCD

- The payment process has many steps, some of which NRCS will complete. This document pulls the steps that are specific to the administrative items the SWCD employees will perform from the overall process and condenses them here. To see a pictorial overview of how these steps flow together, refer to the <u>Flowchart for Active Contracts: Payments</u> supplied with these training materials.
- Between some of the SWCD payment tasks outlined below, NRCS will be completing tasks and/or there will be a time lapse as you wait for something to happen. Time lapses and NRCS task breaks are indicated by a box with a description of what is happening or needs to happen before you move on to the next payment task.
- For SWCDs, it makes a difference whether the CSP payment is for a CMT supported contract (*FY2016 and older CSP plus FY2017 CSP Renewals*) or for a CAET supported contract (*FY17 and newer CSP contracts*). The payment process of a CMT supported CSP contract has an extra task for SWCDs—entering the certification date in ProTracts. The description of the CMT supported CSP payment process can be found in <u>IL Bulletin 300-18-7</u> on SharePoint, but it is also inserted here.
 - For CMT supported CSP contract payments, SWCDs will complete Steps A and B of Making Conservation Stewardship Program (CSP) Payments for CMT Supported Contracts attached below, while the Payment Reviewer and Payment Approver will complete Steps C and D of that same document. SWCDs will skip the instructions to Print Payment Documents for Participant Signatures, as printing the payment documents is described in Step A of Making Conservation Stewardship Program (CSP) Payments for CMT Supported Contracts attached below.
 - For CAET supported CSP contracts (FY 2017 and newer CSP), NRCS will certify the contract items for payment. SWCDs will begin their portion of CAET supported CSP contract payments with **Print Payment Documents for Participant Signatures**.
- For <u>ALL</u> CSP contract payments, SWCDs should complete the payment tasks of <u>Enter Signature Dates for</u> Payment and <u>Print Approved NRCS-CPA-1245</u>.

To complete any of the payment tasks, you will need to open the contract...

OPEN THE CONTRACT

- 1. Login to ProTracts (e-Authentication site)
- 2. Point to the CONTRACTS tab on the yellow bar
- 3. On the drop- down list, highlight MANAGE CONTRACTS.
- 4. Click on MANAGE CONTRACTS

Exhibit 1: CSP Contract Payment Steps for SWCDs



Exhibit 2: CSP Contract Payment Steps for SWCDs



OR

5b. If you want to produce a list of contracts, click on one of the other contract filtering options, such as PROGRAMS screen, and enter the PROGRAM, the FISCAL YEAR, (plus any other filtering criteria) and then click on the green GO button.

5a. On the MANAGE CONTRACTS screen, if you are

looking for a particular contract number or one

participant, stay on the NAME & CONTRACT NUMBER screen and enter either the name or the

contract number, then click on the green GO button.

Your contract or the list of filtered contracts will be produced. Find the contract you want, click on it to high-light it. Double-clicking on it will open it.

Exhibit 3: CSP Contract Payment Steps for SWCDs



Exhibit 4: CSP Contract Payment Steps for SWCDs

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Contracts View Contract Expand Items											
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Ŧ	EQIP 2014	IL	MACOUPIN	CARLINVILLE SER	VICE CENTER						

CERTIFY CMT SUPPORTED CSP CONTRACT ITEMS FOR PAYMENT

This payment task is only performed by SWCDs for <u>CMT supported CSP</u> contracts. SWCDs complete Steps A and B. If your payment is for a CAET supported CSP contract, skip to Print Payment Documents for Participant Signatures task below.

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. Field	Office Submi	its Payment to Pay	ment Re	eviewer							
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ProT	racts										
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2.	Click on "Annu	ual Payments" to e	enter the	e CSP paym	ent modul	Permantin Mont	Madife Se	and Parment	te Promote	OF LOTE	tree
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- 5. In Payment Instructions:
 - a. Verify the Bank Routing Number and Deposit Account are correct.
 - b. Click on the payee information (white line with vendor number, payee, address, etc.) to highlight the line yellow. For contracts with two or more payees, all participants with a payment share >0% must be selected and highlighted yellow.
 - c. If the vendor data needs to be edited, click the "Edit Vendor" button.
 - d. If the vendor data is correct, click the "OK" button.

Notes:

When payment instructions are processing, the user will see a message that states, "Payment Instructions is currently processing your request. Depending upon the number of participants and members on this contract, this could take several minutes.

Do not close this window!"

When payment instructions are completed the contract items will be highlighted yellow and the user will receive a message such as:

"Payment instructions for the amount of \$9,370.00 has been completed for item number 1. The payment must be approved to complete the payment transaction.

Payment instructions for the amount of \$11,132.00 has been completed for item number 2. The payment must be approved to complete the payment transaction."

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6. Click on "Print Form" to create a pdf of the NRCS-CPA-1245.

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2	1													

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	7.	 Select the participant to list on the NRCS-CPA-1245: a. Click the radio button to the left of the name to select the participant. For contracts with multiple participants, select the participant who will be signing the NRCS-CPA-1245. Data for the selected participant will show in the header of the form and to the left of the participant signature block. b. Click the "Print" button. c. A message will be received stating, "This document is being auto-uploaded to the DMS. Select Yes to upload and view the document, select No to just view the document." Answer Yes, if the participant is a Conservation Client Gateway user and will electronically sign the NRCS-CPA-1245. ii. Answer No, for all other participants.
		C SelectComponents - Internet Explorer
	-	Select the participant to list on the NRCS-1245 CULE SCOTT IN 2 W MAIN STREET, CHAMPAIGN, IL, 61821 Print
	8. 9. 10.	Print a hard copy of the NRCS-CPA-1245 for the participant's signature. Review the NRCS-CPA-1245 and verify the information is accurate. Obtain the participant's signature on the NRCS-CPA-1245. Note: For contract with multiple participants, ensure a participant who is allowed to sign signs the NRCS- CPA-1245. Signatory designation can be found in ProTracts Participant Info (signature acceptable for payment) or on the NRCS-CPA-1202 contract. Enter the date the participant signed in the "Participant Signed NRCS-CPA-1245 date" block. CSP Annual Payments Plat Form Certify Items PaymentInstructions Undo Agrowal
		Contract Year: 2016 Payment Year: 2017 Total Estimated Payment: 20,502.00 Total Approved 0.00 Payment: Payment: 0.00 Contract Year: 2016 Payment Year: 2017 Total Estimated Payment: 20,502.00 Total Approved 0.00 Payment: 0.00 Centract Year: 2016 Payment Year: 2017 Total Estimated Payment: 20,502.00 Total Approved 0.00 Payment: Payment: 0.00 Centract Year: 2016 Payment Year: 2017 Reduction: Centract Payment: 0.00 AGI Payment: 0.00 Centract Holy: GINA GERICHE Centract Date: 11/1/2017 Participant Signed 11/02/2017 Deceased Date: Deceased Date: Reviewed Date: Approved Date: Approved Date: 11/02/2017 Deceased Date: Entimate:
B.	Fiel 1. 2.	ld Office Submits Payment to Payment Reviewer All required documents are uploaded to the Document Management System (DMS) following current DMS guidance. The Payment Review is notified that a payment is ready for review.
C.	Pay 1. 2. 3.	ment Reviewer Performs Review Perform a review of the payment. Complete the ProTracts-FMMI Payment Review checklist. Enter the review outcome of Accepted or Rejected in the Payment Review Status column in ProTracts.

4. Notify the field office the review is completed and provide the payment checklist.

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D.	Delegated Payment Approver Reviews the Outcome of the Payment Review and Approves Payment in
	ProTracts

 Review payment amounts, ensure payment amounts are correct for all participants, and ensure erroneous reductions did not occur.

- 2. Approve payment:
 - a. Put a check in each Approve box for all CINs.
 - b. Click on "Approve".
 - c. Verify the payment approved without error and read all messages received.

Centract Year: 2016 Payment Year: 2017 Total intenseted 29,902.00 Total Approxed Payment 5 0.00 Heinber Payment 5 0.00 Heinber Payment 5 0.00 AGI Payment 70.00 AGI Payment 9 0.00														
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**	forms	nce Report						< >						
Print	CIN	Practice	Practice	Units	Plased	Appled	Applied Date	Certiled	AGI Reduction	Payment Unitation Reduction	Payment	Approved	Payment Status	Payment Review Status
2	1	CROP	Cropland Annual Payment	PT	365.81	360.81	11/1/2017	Cartty .	\$0.00	\$0.08	\$9,370.0	Approx		Accepted W
12	2	CROP	Cropiand Annual Payment	PT	30.85	30.85	13/3/2017	Contry Contry	\$0.00	\$0.04	£11,130	Accessos Distribution		Accepted W

3. Complete the ProTracts-FMMI Payment Review checklist and insert date and signature.

4. Upload checklist to DMS.

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PRINT PAYMENT DOCUMENTS FOR PARTICIPANT SIGNATURES

This payment task is the first payment task performed for <u>CAET supported CSP</u> contracts. (You may notice it is the same as Steps A6, A7, A8, and A9 from <u>Making Conservation Stewardship</u> <u>Program (CSP) Payments for CMT Supported Contracts</u> above.)

If your payment is for a CMT supported CSP contract, make sure you have gone to Certify CMT Supported CSP Contract items for Payment task above and complete Steps A and B of <u>Making Conservation Stewardship Program (CSP) Payments for CMT</u> <u>Supported Contracts</u>. Then skip this task and go to <u>Enter Signature Dates for Payment</u> task below.

Before you print the payment documents for participant signature for CAET supported CSP contracts, NRCS will verify which of the contract items are complete and then certify those completed contract items in ProTracts. NRCS will also run the Payment Instructions for the payment.

4

- 1. Open the contract by following Steps 1-6 under Open the Contract above.
- 2. On the Contract screen, click on ANNUAL PAYMENTS.
- 3. In the Payments window, click on PRINT FORM.

Exhibit 5: CSP Contract Payment Steps for SWCDs

۵	NRCS	 Department of Agriculture Natural Resources Conservation Service 								
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Co	onse	rvation C	ontract						<mark>⁄2</mark>	
	Contra	t		Participant I	nfo Appro	ove Modificat	ion History	Annual Payment	s Print	Mo
							Co	ontract Number:		
					Current FY					

Exhibit 6: CSP Contract Payment Steps for SWCDs

Certify and Approve CS	P Annual Payments - Internet	Explorer			
CSP Annual Payments	Print Form	Certify Items Payme	nt Instructions Approve	Undo Certification Und	do Payment Instructions Undo Approval
Contract Year: 2018	2 estimated 4,393.00	Total Approved 0.00	Participant Payment	Limitation Reduction: \$	0.00
		r uyinche y	AG	I Payment Reduction: \$	0.00
Certified by:	Certified Date:		Participant Signed NRCS-CPA-1245 date:		Deceased Date Returned:
Reviewed by:	Reviewed Date:		Performance Report:		
Approved By:	Approved Date:				

- 4. In the Select Participant window, click on the radial button to the left of the name of the participant who needs to sign the NRCS-CPA-1245.
- 5. Click PRINT
- 6. A message will pop up stating the document is being auto-uploaded to DMS. Select NO to not auto-upload.
- 7. The NRCS-CPA-1245 will open as a web pdf in a new window. In that new window, click on FILE and PRINT to print as your normally would.

Exhibit 7: CSP Contract Payment Steps for SWCDs

	LITCHFIELD, IL, 62056
5	
Print	This document is being auto-uploaded to the DMS. Select Yes to upload and view the document, select No to just view the

Once the NRCS-CPA-1245 is printed and reviewed, you are ready to obtain the participant signature.

After the participant has signed the NRCS-CPA-1245, you are ready to enter the signature dates in ProTracts.

ENTER SIGNATURE DATES FOR PAYMENT

- 1. Open the contract by following Steps 1-6 under Open the Contract above.
- 2. On the Contract screen, click on ANNUAL PAYMENTS.

SIGNED NRCS-CPA-1245 DATE box.

Exhibit 8: CSP Contract Payment Steps for SWCDs

NRC	Natural Resources Conservation Service								
Tools	Applications	Contracts	Rates I	Forms	Funds	Reports	Contact Us	Help	Lo
Conse	ervation C	ontract						<mark>⁄2</mark>	
😑 Contra	ict		Participant Info	Approv	ve Modificati	on History	Annual Payment	s Print	Mo
						Co	ntract Number:		
			Cu	rrent FY					

3. In the Payments window, using the mm/dd/yyyy format, enter the date the participant signed the NRCS-CPA-1245 in the PARTICIPANT

Exhibit 9: CSP Contract Payment Steps for SWCDs



Once the signature date(s) have been entered for each of the CINs on the signed NRCS-CPA-1245, you will need to upload the appropriate documents to DMS—as outlined in the DMS Upload Table.

After the appropriate documents have been uploaded to DMS, you will send an email to the appropriate Area staff member for review. Use the following format for the subject line of the email: Payment {county name} {application #} {applicant name}

The appropriate Area staff member will review the uploaded payment documents. If everything is acceptable, the Area Reviewer will complete and electronically sign the review portion of a payment checklist. The DC will then be informed that the payment has been reviewed. The DC will approve the payment by electronically signing the NRCS-CPA-1245 and the approval portion of the payment checklist. The DC should then communicate to you that the approved contract documents are ready to print, upload to DMS, and file.

PRINT APPROVED NRCS-CPA-1245

- 1. Open the contract by following Steps 1-6 under Open the Contract above.
- 2. On the Contract screen, click on ANNUAL PAYMENTS.
- 3. In the Payments window, click on PRINT FORM.

Exhibit 10: CSP Contract Payment Steps for SWCDs

ONRCS	Natural Resources Conservation Service										
Tools	Applications	Contracts	Rates	Forms	Funds	Reports	Contact Us	Help	Lo		
Conse	ervation C	ontract						<u> </u>	2		
E Contra	ct		Participant Inf	o Appro	ove Modificati	on History	Annual Payment	s Print	Mo		
Contract Number:											
Current FY											

Exhibit 11: CSP Contract Payment Steps for SWCDs

CSP Annual Payments	Print Form Certify Ite	ns Payment Instructions Approve Undo Certifi	cation Undo Payment Instructions Undo Appro
Contract Year: 2018	estimated ayment: \$ 4,393.00 Total Appr Payme	Participant Payment Limitation Re ent: \$ 0.00 AGI Payment Re	eduction: \$ 0.00 eduction: \$ 0.00
Certified by:	Certified Date:	Participant Signed NRCS-CPA-1245 date:	Deceased Date Returned:
Reviewed by:	Reviewed Date:	Performance Report:	
Approved But	Annroved Date:		

- 4. In the Select Participant window, click on the radial button to the left of the name of the participant who needs to sign the NRCS-CPA-1245.
- 5. Click PRINT
- A message will pop up stating the document is being auto-uploaded to DMS. This time, select YES to auto-upload the document to DMS.
- 7. The NRCS-CPA-1245 will open as a web pdf in a new window. In that new window, click on FILE and PRINT to print as your normally would.

Exhibit 12: CSP Contract Payment Steps for SWCDs



This final print process will auto-upload the electronically approved NRCS-CPA-1245 to DMS, but you will need to manually upload the payment checklist to DMS. (You can do that one of two ways...just upload the electronic version of the checklist that contains both the electronic signatures <u>or</u> you can print the signed payment checklist, scan it, and upload like other manually signed documents.) Provide a copy of the NRCS-CPA-1245 to the participant. File the printed NRCS-CPA-1245 and the payment checklist in the program folder.