

Scanned to email	Uploaded to DMS	CSP Funded Apps	Document & Required Pages	Document Type Name in DMS	Category	Document Title	Signatures	Search by: Agreement or Client	<b>CSP</b> <b>Name:</b> _____ <b>Contract #:</b> _____ <b>Fund:</b> _____
		A*	Field Verification Adverse Determination Letter	Adverse Action Letter (CSP Ineligible Letter)					
		A	ProTracts Ranking Report	AERT Ranking Report	Evaluate	N/A	Participant (only select if the participant signed the ranking and manually uploading)	Agreement	Auto-upload is triggered when the ranking is completed and the user clicks Save on the "Final Ranking Score" screen. Answer "Yes" to the auto-upload pop-up message. If the ranking is changed, the users must auto-upload the revised ranking and it will save as a new version in the DMS.
		A	CAET Summary Report from ProTracts	CSP CAET Summary Tool	Evaluate	N/A	N/A	Agreement	Auto-upload to DMS through ProTracts. In the ProTracts "CAET Summary Report" click the "Print" button and click "Yes" to auto-upload to the DMS.
		A	CSP Preapproved Letter	CSP Preapproved Application Letter					
		A	NRCS-CPA-1155 [after obligation]	NRCS-CPA-1155 Schedule of Operations					
		A	NRCS-CPA-1202 [after obligation]	NRCS-CPA-1202 Conservation Program Contract					
		X	NRCS-CPA-1200 (signed and all pages)	NRCS-CPA-1200 Application	CPC	Enter program & date application was signed. Example: "EQIP 10-10-2014"	Participant	Agreement	
		X	NRCS-CPA-1202 (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract	CPC	N/A	Participant	Agreement	If a handwritten NRCS-CPA-152 was created due to a SCIMS name change, then the NRCS-CPA-152 should be scanned with the NRCS-CPA-1202.
		X	NRCS-CPA-1155 (signed and all pages)	NRCS-CPA-1155 Schedule of Operations	CPC	N/A	Participant & Technical	Agreement	
		X	Appendix (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract Appendix	CPC	N/A	Participant	Agreement	All pages of the appendix must be included in the scanned pdf.
		X	NRCS-CPA-52	NRCS-CPA-52 Environmental Evaluation Worksheet	Evaluate	N/A	Technical	Agreement	
		X	Conservation Plan and/or Map	Conservation Plan & Map (Agreement)	Conservation Plan	Enter the type of plan and/or map plus date. Examples: ●CSP Plan and Map 7-1-20	NRCS Approving Official, Participant, Partner (only select who signed the plan)	Agreement	The conservation plan and map(s) can be uploaded together as one file or separately, depending on the situation. The map(s) must clearly identify the land to which the contract applies and location of planned practices/activities. The practices/activities in the plan are the practices/activities in the contract.
		X	Producer Farm Data Report or FSA-156EZ	Land Control	CPC	Enter document type and crop year, if needed tract/farm. Examples: ●Producer Farm Data Report Crop	N/A	Agreement	Land control documents are: deed, lease, and other legal agreement per policy in Part 512.22A(1). FSA records are used to document operator or record, private/public farmland, and agricultural producer.
		X	Producer Ag Operation Maps	CSP Producer Ag Operation Delineation Maps	CPC	N/A	N/A	Agreement	
		X*	Pastured Cropland Tool Report	Soil Maps and Reports	Conservation Plan	Enter "Pastured Cropland Report" and date	N/A	Client & CST Plan	The pastured cropland tool report from Integrated Data for Enterprise Analysis (IDEA) or Toolkit. <b>This gets attached to Toolkit folder &amp; Consplan. Only needed if CSP contract has pastured acres.</b>
		X*	Waiver letter from State Conservationist to start a practice or activity prior to contract obligation	Waiver To Begin Conservation Practice Letter	Waiver	N/A	N/A	Agreement	<b>Only needed if participant wrote a letter to State Conservationist requesting to begin a practice prior to contract obligation. Upload the response letter from the State Conservationist granting the permission.</b>
		X*	Written permission from landowner to allow implementation of structural or vegetative practice	Other - Agreement	Other	Enter "Landowner written permission for tract ____". If needed, provide more details.	N/A	Agreement	<b>Only needed if landowner(s) is (are) not a participant(s) on contract. If landowner signed page 16 of the Appendix, you can load just page 16 of the Appendix as the document to fulfill this requirement. Otherwise, you need a letter from each landowner affected.</b>

		X*	CSP operator of record waiver letter from State Conservationist	STC Agreement Waiver Letter-Other	Waiver	Enter "CSP Operator of Record Waiver"	N/A	Agreement	Only needed if participant wrote a letter to State Conservationist requesting to be listed as the Operator of Record for certain tracts. Upload the response letter from the State Conservationist granting the change.
		X	Consolidated CAET report	CSP CAET Tool					Upload through ProTracts. The consolidated report is one file that includes the operation summary and all land mgmt. system reports. The "Print All" option from CAET-Interim Reports produces a file named "815A121-----CAETTool.pdf". This file with the name unchanged must be uploaded using the "CAET Tool Upload" in ProTracts.
		X*	CSP Memo Waiving Policy in 507.80C(4)	Other - Agreement	Other	Enter "CSP Memo Waiver for Scheduled Activities"	N/A	Agreement	Only needed if the applicant requested a waiver for scheduled activities and NRCS STC granted the waiver.
		X*	MRBI-CSP Screening Worksheet	Other - Agreement	Other	Enter "MRBI - Screening Questions"	N/A	Agreement	Only needed if the application is in an MRBI area and is an MRBI fund code application.
		X*	RCPP-CSP Screening Worksheet	Other - Agreement	Other	Enter "RCPP-CSP - Screening Worksheet"	N/A	Agreement	Only needed if the application is in an RCPP area and is an RCPP application.
		X*	Signature Authority (all pages)	Other Signatory	Signatory	Enter the document type such as Trust Agreement, Articles of Partnership, etc.	N/A	Client	Only needed if at least one participant is an Entity and a CCC-901 or CCC-902 has not been completed or cannot be obtained for the entity.
		X*	CCC-901	CCC-901 Member's Information	Signatory	N/A	Participant	Client	Only needed if at least one participant is an Entity.
		X*	CCC-902	CCC-902 Farm Operating Plan Entity	Signatory	N/A	Participant	Client	Only needed if at least one participant is an Entity.
		X*	Power of Attorney (POA)	FSA-211 Power of Attorney	Signatory	Enter name of grantee (agent)	Participant	Client	The client that is searched for and where the POA gets uploaded to must be the grantor (contract participant). The grantee (agent) must be listed in the document title to identify, who can sign for the grantor.
		X**	SF-1199A	SF-1199A Direct Deposit	Vendor	Enter date SF-1199A was signed. Example: "2-12-2015"	Participant	Client	If participant has filled out an SF-1199A, you won't need an NRCS-FNM-60. The SF-1199A is preferred and more common.
		X**	NRCS-FNM-60	NRCS-FNM-60 Hardship EFT Waiver Request	Vendor	N/A	Participant	Client	If Participant has filled an NRCS_FNM-60, you won't need an SF-1199A. The SF-1199A is preferred and more common.
		X*	CSP Enhancement Job Sheet (for 2017-1 General and 2018-1 Renewal)	CSP Enhancement Job Sheet	CPC	Enter the enhancement code(s). Example: E340101Z-E590130Z	N/A	Agreement	For the planned enhancements, upload all enhancement job sheets as one pdf. Only needed if doing Enhancements as listed.
		X*	CSP Enhancement Job Sheet (for 2018-1 General, 2019-1 Renewal, and subsequent years)	CSP Enhancement Job Sheet	CPC	Enter the enhancement code(s) and the fiscal year(s) the job sheets are applicable. Examples: ●E340107Z FY18; E590130Z FY18-22 ●E590130Z FY18-22 ●E340107Z FY18	N/A	Agreement	Upload all pages of the planned enhancements as one pdf with the "Documentation and Implementation Requirements" completed. Depending on the enhancements, new job sheets may need to be uploaded with the "Documentation and Implementation Requirements" section completed for subsequent fiscal years using the "version" function. Only needed if doing Enhancements as listed.
		X	CSP Quality Assurance Checklist	CSP Preobligation Checklist	CPC	N/A	N/A	Agreement	The checklist is uploaded by both the field and area offices after each performs their review and uses the "version" function after the initial upload. Starting with 2017-1 General signup, all CSP quality assurance checklists must be uploaded to the "CSP Preobligation Checklist" type.
		X	Current Conservation Plan and/or Map	Conservation Plan & Map (Plan)	Conservation Plan	Enter the type of plan and/or map plus date. Examples: ●Conservation Plan and Map 3-6-2017	NRCS Approving Official, Participant, Partner (only select who signed the plan)	Conservation Plan	The conservation plan and map is the typical plan NRCS develops when going through the planning process. This document type differs from the Conservation Plan & Map (Agreement) because it is uploaded to the CST Customer Folder and not the contract.
		X*	Practice Job Sheets	Design	Design/Certify	Enter the practice, description, and date		Agreement Item	The completed job sheets are for practices in ProTracts agreements only. Per the CSP Appendix and policy, practice job sheets must be uploaded to the DMS for CSP contracts obligated in FY2017 and forward. Only needed if doing CSP Practices (usually more common than Enhancements)
		X*	Cultural Resources Review	Cultural Resources Evaluation	Evaluate	N/A	N/A	Agreement	Scan/combine all documents into one file. The uploaded file should include the Illinois Cultural Resources Review Form, map(s), and email response for all sites in the contract. Only needed if doing activities that require a CRR

\* = document may or may not be needed

\*\* = for each participant, one or the other document required, not both

Scanned to email	Uploaded to DMS	EQIP Funded Application	Document & Required Pages	Document Type Name in DMS	Category	Document Title	Signatures	Search by: Agreement or Client	EQIP Name: _____ Contract #: _____ Fund: _____
		A	NRCS-CPA-1202 [after obligation]	NRCS-CPA-1202 Conservation Program Contract					
		A	NRCS-CPA-1155 [after obligation]	NRCS-CPA-1155 Schedule of Operations					
		A	ProTracts Ranking Report	AERT Ranking Report	Evaluate	N/A	Participant (only select if the participant signed the ranking and manually uploading)	Agreement	Auto-upload is triggered when the ranking is completed and the user clicks Save on the "Final Ranking Score" screen. Answer "Yes" to the auto-upload pop-up message. If the ranking is changed, the users must auto-upload the revised ranking and it will save as a new version in the DMS.
		A	Preapproved Letter	Preapproved Application Letter					
		X	NRCS-CPA-1200 (signed and all pages)	NRCS-CPA-1200 Application	CPC	Enter program & date application was signed. Example: "EQIP 10-10-2014"	Participant	Agreement	
		X	NRCS-CPA-1202 (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract	CPC	N/A	Participant	Agreement	If a handwritten NRCS-CPA-152 was created due to a SCIMS name change, then the NRCS-CPA-152 should be scanned with the NRCS-CPA-1202.
		X	NRCS-CPA-1155 (signed and all pages)	NRCS-CPA-1155 Schedule of Operations	CPC	N/A	Participant & Technical	Agreement	
		X	Appendix (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract Appendix	CPC	N/A	Participant	Agreement	All pages of the appendix must be included in the scanned pdf.
		X	EQIP Quality Assurance Checklist	EQIP Preobligation Checklist	CPC	N/A	N/A	Agreement	The checklist is uploaded by both the field and area offices after each performs their review and uses the "version" function after the initial upload.
		X	NRCS-CPA-52	NRCS-CPA-52 Environmental Evaluation Worksheet	Evaluate	N/A	Technical	Agreement	
		X	Conservation Plan and/or Map	Conservation Plan & Map (Agreement)	Conservation Plan	Enter the type of plan and/or map plus date. Examples: ●EQIP Plan and Map 2-1-2017	NRCS Approving Official, Participant, Partner (only select who signed the plan)	Agreement	<b>Upload ALL plans and maps as one document.</b> The conservation plan and map(s) can be uploaded together as one file or separately, depending on the situation. The map(s) must clearly identify the land to which the contract applies and location of planned practices/activities. The practices/activities in the plan are the practices/activities in the contract.
		X	Producer Farm Data Report or FSA-156EZ	Land Control	CPC	Enter document type and crop year, if needed tract/farm. Examples: ●Producer Farm Data Report Crop Year 2017	N/A	Agreement	Land control documents are: deed, lease, and other legal agreement per policy in Part 512.22A(1). FSA records are used to document operator or record, private/public farmland, and agricultural producer.
		X	Soil Maps	Soil Maps and Reports	Conservation Plan	Enter type of map and date	N/A	Client & CST Plan	<b>Scan map with report BY TRACT. When uploading, must attach to Toolkit folder and Consplan.</b>
		X*	Waiver letter from State Conservationist to start a practice or activity prior to contract obligation	Waiver To Begin Conservation Practice Letter	Waiver	N/A	N/A	Agreement	<b>Only needed if participant wrote a letter to State Conservationist requesting to begin a practice prior to contract obligation. Upload the response letter from the State Conservationist granting the permission.</b>
		X*	Written permission from landowner to allow implementation of structural or vegetative practice	Other - Agreement	Other	Enter "Landowner written permission for tract ____". If needed, provide more details.	N/A	Agreement	<b>Only needed if landowner(s) is (are) not a participant(s) on contract. If landowner signed page 16 of the Appendix, you can load just page 16 of the Appendix as the document to fulfill this requirement. Otherwise, you need a letter from each landowner affected.</b>

		X*	CAP (all pages including signature page)	Conservation Activity Plan	Conservation Plan	Enter type of plan and date. The date is when NRCS signs the signature page as accepted or CAP revision date. Example: "CNMP 2-1-2017" or "FMP 11-21-2016"	Participant	Agreement	For implementation contracts only, upload the CAP to the agreement/contract that will implement practices in the CAP. The CAP must be one file which might require pdfs to be combined. <b>Only needed if application is for a Conservation Activity Plan.</b>
		X*	EQIP Screening Worksheet	Other - Agreement	Other	Enter "Screening Worksheet" and date signed	N/A	Agreement	<b>Only needed for General &amp; Forestry EQIP contracts. (Not needed for MRBI, RCPP, CNMP)</b>
		X*	Signature Authority (all pages)	Other Signatory	Signatory	Enter the document type such as Trust Agreement, Articles of Partnership, etc.	N/A	Client	<b>Only needed if at least one participant is an Entity and a CCC-901 or CCC-902 has not been completed or cannot be obtained for the entity.</b>
		X*	CCC-901	CCC-901 Member's Information	Signatory	N/A	Participant	Client	<b>Only needed if at least one participant is an Entity.</b>
		X*	CCC-902	CCC-902 Farm Operating Plan Entity	Signatory	N/A	Participant	Client	<b>Only needed if at least one participant is an Entity.</b>
		X*	Power of Attorney (POA)	FSA-211 Power of Attorney	Signatory	Enter name of grantee (agent)	Participant	Client	The client that is searched for and where the POA gets uploaded to must be the grantor (contract participant). The grantee (agent) must be listed in the document title to identify, who can sign for the grantor.
		X**	SF-1199A	SF-1199A Direct Deposit	Vendor	Enter date SF-1199A was signed. Example: "2-12-2015"	Participant	Client	<b>If participant has filled out an SF-1199A, you won't need an NRCS-FNM-60. The SF-1199A is preferred and more common.</b>
		X**	NRCS-FNM-60	NRCS-FNM-60 Hardship EFT Waiver Request	Vendor	N/A	Participant	Client	<b>If Participant has filled an NRCS_FNM-60, you won't need an SF-1199A. The SF-1199A is preferred and more common.</b>
		X	Cultural Resources Review	Cultural Resources Evaluation	Evaluate	N/A	N/A	Agreement	Scan/combine all documents into one file. The uploaded file should include the Illinois Cultural Resources Review Form, map(s), and email response for all sites in the contract.

Scanned to email	Uploaded to DMS	CSP Renewal Application	Document & Required Pages	Document Type Name in DMS	Category	Document Title	Signatures	Search by: Agreement or Client	<b>CSP RENEWAL</b> Name: _____ Contract #: _____ Fund: _____
		A	NRCS-CPA-1202 [after obligation]	NRCS-CPA-1202 Conservation Program Contract					
		A	NRCS-CPA-1155 [after obligation]	NRCS-CPA-1155 Schedule of Operations					
		A	CSP Preapproved Letter	CSP Preapproved Application Letter					
		A	CSP Contract Renewal Notification Letter	CSP Contract Renewal Notification					
		A*	Field Verification Adverse Determination Letter	Adverse Action Letter (CSP Ineligible Letter)					
		A	CAET Summary Report from ProTracts	CSP CAET Summary Tool	Evaluate	N/A	N/A	Agreement	Auto-upload to DMS through ProTracts. In the ProTracts "CAET Summary Report" click the "Print" button and click "Yes" to auto-upload to the DMS.
		X	NRCS-CPA-1200 (signed and all pages)	NRCS-CPA-1200 Application	CPC	Enter program & date application was signed. Example: "CSP 10-10-2014"	Participant	Agreement	
		X	NRCS-CPA-1202 (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract	CPC	N/A	Participant	Agreement	If a handwritten NRCS-CPA-152 was created due to a SCIMS name change, then the NRCS-CPA-152 should be scanned with the NRCS-CPA-1202.
		X	NRCS-CPA-1155 (signed and all pages)	NRCS-CPA-1155 Schedule of Operations	CPC	N/A	Participant & Technical	Agreement	
		X	Appendix (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract Appendix	CPC	N/A	Participant	Agreement	All pages of the appendix must be included in the scanned pdf.
		X	NRCS-CPA-1248	NRCS-CPA-1248 CSP Contract Renewal Worksheet	CPC	N/A	Participant	Agreement	Upload the document to the new renewal application and not the expiring CSP contract.
		X	NRCS-CPA-52	NRCS-CPA-52 Environmental Evaluation Worksheet	Evaluate	N/A	Technical	Agreement	
		X	Conservation Plan and/or Map	Conservation Plan & Map (Agreement)	Conservation Plan	Enter the type of plan and/or map plus date. Examples: ●CSP Plan and Map 7-1-2017	NRCS Approving Official, Participant, Partner (only select who signed the plan)	Agreement	The conservation plan and map(s) can be uploaded together as one file or separately, depending on the situation. The map(s) must clearly identify the land to which the contract applies and location of planned practices/activities. The practices/activities in the plan are the practices/activities in the contract.
		X	Producer Farm Data Report or FSA-156EZ	Land Control	CPC	Enter document type and crop year, if needed tract/farm. Examples: ●Producer Farm Data Report Crop Year 2017 ●FSA-156EZ Crop Year 2017 Farm 3165	N/A	Agreement	Land control documents are: deed, lease, and other legal agreement per policy in Part 512.22A(1). FSA records are used to document operator or record, private/public farmland, and agricultural producer.
		X	Producer Ag Operation Maps	CSP Producer Ag Operation Delineation Maps	CPC	N/A	N/A	Agreement	
		X*	Pastured Cropland Tool Report	Soil Maps and Reports	Conservation Plan	Enter "Pastured Cropland Report" and date	N/A	Client & CST Plan	The pastured cropland tool report from Integrated Data for Enterprise Analysis (IDEA) or Toolkit. <b>This gets attached to Toolkit folder &amp; Consplan. Only needed if CSP contract has pastured acres.</b>
		X*	Written permission from landowner to allow implementation of structural or vegetative practice	Other - Agreement	Other	Enter "Landowner written permission for tract ____". If needed, provide more details.	N/A	Agreement	Only needed if landowner(s) is (are) not a participant(s) on contract. If landowner signed page 16 of the Appendix, you can load just page 16 of the Appendix as the document to fulfill this requirement. Otherwise, you need a letter from each landowner affected.
		X*	CSP operator of record waiver letter from State Conservationist	STC Agreement Waiver Letter-Other	Waiver	Enter "CSP Operator of Record Waiver"	N/A	Agreement	Only needed if participant wrote a letter to State Conservationist requesting to be listed as the Operator of Record for certain tracts. Upload the response letter from the State Conservationist granting the change.

		X	Consolidated CAET report	CSP CAET Tool					<b>Upload through ProTracts.</b> The consolidated report is one file that includes the operation summary and all land mgmt. system reports. The "Print All" option from CAET-Interim Reports produces a file named "815A121-----CAETTool.pdf" This file with the name unchanged must be uploaded using the "CAET Tool Upload" in ProTracts.
		X*	CSP Memo Waiving Policy in 507.80C(4)	Other - Agreement	Other	Enter "CSP Memo Waiver for Scheduled Activities"	N/A	Agreement	Only needed if the applicant requested a waiver for scheduled activities and NRCS STC granted the waiver.
		X*	Signature Authority (all pages)	Other Signatory	Signatory	Enter the document type such as Trust Agreement, Articles of Partnership, etc.	N/A	Client	Only needed if at least one participant is an Entity and a CCC-901 or CCC-902 has not been completed or cannot be obtained for the entity.
		X*	CCC-901	CCC-901 Member's Information	Signatory	N/A	Participant	Client	Only needed if at least one participant is an Entity.
		X*	CCC-902	CCC-902 Farm Operating Plan Entity	Signatory	N/A	Participant	Client	Only needed if at least one participant is an Entity.
		X*	Power of Attorney (POA)	FSA-211 Power of Attorney	Signatory	Enter name of grantee (agent)	Participant	Client	The client that is searched for and where the POA gets uploaded to must be the grantor (contract participant). The grantee (agent) must be listed in the document title to identify, who can sign for the grantor.
		X**	SF-1199A	SF-1199A Direct Deposit	Vendor	Enter date SF-1199A was signed. Example: "2-12-2015"	Participant	Client	If participant has filled out an SF-1199A, you won't need an NRCS-FNM-60. The SF-1199A is preferred and more common.
		X**	NRCS-FNM-60	NRCS-FNM-60 Hardship EFT Waiver Request	Vendor	N/A	Participant	Client	If Participant has filled an NRCS_FNM-60, you won't need an SF-1199A. The SF-1199A is preferred and more common.
		X*	CSP Enhancement Job Sheet (for 2017-1 General and 2018-1 Renewal)	CSP Enhancement Job Sheet	CPC	Enter the enhancement code(s). Example: E340101Z-E590130Z	N/A	Agreement	For the planned enhancements, upload all enhancement job sheets as one pdf. Only needed if doing Enhancements as listed.
		X*	CSP Enhancement Job Sheet (for 2018-1 General, 2019-1 Renewal, and subsequent years)	CSP Enhancement Job Sheet	CPC	Enter the enhancement code(s) and the fiscal year(s) the job sheets are applicable. Examples: ●E340107Z FY18; E590130Z FY18-22 ●E590130Z FY18-22 ●E340107Z FY18	N/A	Agreement	Upload all pages of the planned enhancements as one pdf with the "Documentation and Implementation Requirements" completed. Depending on the enhancements, new job sheets may need to be uploaded with the "Documentation and Implementation Requirements" section completed for subsequent fiscal years using the "version" function. Only needed if doing Enhancements as listed.
		X	CSP Quality Assurance Checklist	CSP Preobligation Checklist	CPC	N/A	N/A	Agreement	The checklist is uploaded by both the field and area offices after each performs their review and uses the "version" function after the initial upload. Starting with 2017-1 General signup, all CSP quality assurance checklists must be uploaded to the "CSP Preobligation Checklist" type.
		X	Current Conservation Plan and/or Map	Conservation Plan & Map (Plan)	Conservation Plan	Enter the type of plan and/or map plus date. Examples: ●Conservation Plan and Map 3-6-2017 ●Tract 5874 Plan and Map 7-1-2017	NRCS Approving Official, Participant, Partner (only select who signed the plan)	Conservation Plan	The conservation plan and map is the typical plan NRCS develops when going through the planning process. This document type differs from the Conservation Plan & Map (Agreement) because it is uploaded to the CST Customer Folder and not the contract.
		X*	Practice Job Sheets	Design	Design/Certify	Enter the practice, description, and date		Agreement Item	The completed job sheets are for practices in ProTracts agreements only. Per the CSP Appendix and policy, practice job sheets must be uploaded to the DMS for CSP contracts obligated in FY2017 and forward. Only needed if doing CSP Practices (usually more common than Enhancements)
		X*	Cultural Resources Review	Cultural Resources Evaluation	Evaluate	N/A	N/A	Agreement	Scan/combine all documents into one file. The uploaded file should include the Illinois Cultural Resources Review Form, map(s), and email response for all sites in the contract. Only needed if doing activities that require a CRR

\* = document may or may not be needed

\*\* = for each participant, one or the other document required, not both

Scanned to email	Uploaded to DMS	Modification	Document & Required Pages	Document Type Name in DMS	Category	Document Title	Signatures	Search by: Agreement or Client	MODIFICATION Name: _____ Contract #: _____ Fund: _____
		A*	NRCS-CPA-152 [after modification approval]	NRCS-CPA-152 Land or Payment Share Transfer					
		A	NRCS-CPA-1156 [after modification approval]	NRCS-CPA-1156 Schedule Mod					After each modification approval, the NRCS-CPA-1156 must be auto-uploaded by clicking "Print" in ProTracts, selected NRCS-CPA-1156 and "Yes" to auto-upload to the DMS.
		X	Appendix (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract Appendix	CPC	N/A	Participant	Agreement	All pages of the appendix must be included in the scanned pdf. When the contract transfers or a new participant is added to the contract through a modification, the new individual or entity must sign the Appendix with the other participant signatures and the document is uploaded as a new version in the DMS.
		X*	CAET Summary Report from ProTracts	CSP CAET Summary Tool	Evaluate	N/A	N/A	Agreement	<b>Application:</b> Auto-upload to DMS through ProTracts. In the ProTracts "CAET Summary Report" click the "Print" button and click "Yes" to auto-upload to the DMS. <b>Modification:</b> If the modification changes the acres or information in the CAET Summary Report in ProTracts, then the updated version must be uploaded to the DMS from the CAET Summary Report in ProTracts.
		X*	Consolidated CAET report	CSP CAET Tool					<b>Upload through ProTracts.</b> The consolidated report is one file that includes the operation summary and all land mgmt. system reports. The "Print All" option from CAET-Interim Reports produces a file named "815A121-----CAETTool.pdf" as an example. This file with the name unchanged must be uploaded using the "CAET Tool Upload" in ProTracts. <b>Modification:</b> If the modification changes the CAET answers or planned activities, then the updated consolidated report must be uploaded as a new version.
		X*	Signature Authority (all pages)	Other Signatory	Signatory	Enter the document type such as Trust Agreement, Articles of Partnership, etc.	N/A	Client	
		X*	CCC-901	CCC-901 Member's Information	Signatory	N/A	Participant	Client	
		X*	CCC-902	CCC-902 Farm Operating Plan Entity	Signatory	N/A	Participant	Client	
		X*	Power of Attorney (POA)	FSA-211 Power of Attorney	Signatory	Enter name of grantee (agent)	Participant	Client	The client that is searched for and where the POA gets uploaded to must be the grantor (contract participant). The grantee (agent) must be listed in the document title to identify, who can sign for the grantor.
		X*	Power of Attorney (POA) (for contracts FY05-09)	NRCS-CPA-009	Signatory	N/A	Participant	Client	
		X*	NRCS-CPA-152 (signed and all pages)	NRCS-CPA-152 Land or Payment Share Transfer	CPC	N/A	Participant	Agreement	
		X*	Supplement to the NRCS-CPA-152 for CSP Partial Land Transfers	CSP Supplement for the NRCS-CPA-152	CPC	N/A	Participant & Technical	Agreement	For CSP (CMT Supported) only when there is a partial land transfer.
		X	NRCS-CPA-1156 (signed and all pages)	NRCS-CPA-1156 Schedule Mod	CPC	N/A	Technical and Participant (only select participant, if he/she signed the NRCS-CPA-1156)	Agreement	When selecting "Signatures", the Participant is only selected when the participant signs the NRCS-CPA-1156. The Agreement Mod number in the DMS will correspond to the modification number in ProTracts.
		X*	Participant written request to remove land from CSP accepted into CRP	Correspondence	Correspondence	"Land accepted into CRP" If needed, provide more details such as tract number, date, etc.	N/A	Agreement	CSP only.
		X*	CSP Summary Report from the CMT (signed and all pages)	CMT Summary Report	Evaluate	N/A	Participant	Agreement	If the CMT was changed during the modification, then ensure the following is in the DMS: 1) The Summary Report prior to the modification, and 2) The new revised Summary Report signed by participant and DC. The more recent version of the CMT must have the highest version number.

		X*	512.123 Transfer Eligibility Notice Letter	Correspondence	Correspondence	Enter "Land Transfer Letter"	Participant	Agreement	Upload letter to the new participant and agreement (contract) number after the land transfer modification is started.
		X*	CSP Enhancement Job Sheet (for 2017-1 General and 2018-1 Renewal)	CSP Enhancement Job Sheet	CPC	Enter the enhancement code(s). Example: E340101Z-E590130Z	N/A	Agreement	For the planned enhancements, upload all enhancement job sheets as one pdf.
		X*	CSP Enhancement Job Sheet (for 2018-1 General, 2019-1 Renewal, and subsequent years)	CSP Enhancement Job Sheet	CPC	Enter the enhancement code(s) and the fiscal year(s) the job sheets are applicable. Examples: ●E340107Z FY18; E590130Z FY18-22 ●E590130Z FY18-22 ●E340107Z FY18	N/A	Agreement	Upload all pages of the planned enhancements as one pdf with the "Documentation and Implementation Requirements" completed. Depending on the enhancements, new job sheets may need to be uploaded with the "Documentation and Implementation Requirements" section completed for subsequent fiscal years using the "version" function.



Scanned to email	Uploaded to DMS	Payment	Document & Required Pages	Document Type Name in DMS	Category	Document Title	Signatures	Search by: Agreement or Client	<b>PAYMENT</b> Name: _____ Contract #: _____ Fund: _____
		A	NRCS-CPA-1245 [after payment approval]	NRCS-CPA-1245 Practice Approval and Payment Application					After each payment approval, the NRCS-CPA-1245 must be auto-uploaded to the DMS by clicking "Print Form" in ProTracts.
		X	NRCS-CPA-1202 (signed and all pages)	NRCS-CPA-1202 Conservation Program Contract	CPC	N/A	Participant	Agreement	If a handwritten NRCS-CPA-152 was created due to a SCIMS name change, then the NRCS-CPA-152 should be scanned with the NRCS-CPA-1202.
		X*	Signature Authority (all pages)	Other Signatory	Signatory	Enter the document type such as Trust Agreement, Articles of Partnership, etc.	N/A	Client	Only needed if at least one participant is an Entity and a CCC-901 or CCC-902 has not been completed or cannot be obtained for the entity.
		X*	CCC-901	CCC-901 Member's Information	Signatory	N/A	Participant	Client	Only needed if at least one participant is an Entity.
		X*	CCC-902	CCC-902 Farm Operating Plan Entity	Signatory	N/A	Participant	Client	Only needed if at least one participant is an Entity.
		X*	Power of Attorney (POA)	FSA-211 Power of Attorney	Signatory	Enter name of grantee (agent)	Participant	Client	The client that is searched for and where the POA gets uploaded to must be the grantor (contract participant). The grantee (agent) must be listed in the document title to identify, who can sign for the grantor.
		X*	Power of Attorney (POA) (for contracts FY05-09)	NRCS-CPA-009	Signatory	N/A	Participant	Client	
		X**	SF-1199A	SF-1199A Direct Deposit	Vendor	Enter date SF-1199A was signed. Example: "2-12-2015"	Participant	Client	If participant has filled out an SF-1199A, you won't need an NRCS-FNM-60. The SF-1199A is preferred and more common.
		X	NRCS-CPA-1245 (all pages)	NRCS-CPA-1245 Practice Approval and Payment Application	Payment	N/A	Participant	Agreement	CINs that were printed on the CPA-1245 must be selected before uploading.
		X	ProTracts – FMMI Payment Review Checklist [after payment approval]	Payment Checklist	Payment	N/A	NRCS	Agreement	Only upload checklist <b>after</b> the payment is approved and the approver signs the checklist. CINs that were approved for payment must be selected during upload.
		X**	NRCS-FNM-60	NRCS-FNM-60 Hardship EFT Waiver Request	Vendor	N/A	Participant	Client	If Participant has filled an NRCS_FNM-60, you won't need an SF-1199A. The SF-1199A is preferred and more common.
		X*	NRCS-CPA-1236	NRCS-CPA-1236 Assignment of Payment	Assignment	Enter assignee's name	Participant	Agreement	Only needed if the payment is being assigned to someone other than the participant(s) named as receiving a share.
		X*	CAP (all pages including signature page)	Conservation Activity Plan	Conservation Plan	Enter type of plan and date. The date is when NRCS signs the signature page as accepted or CAP revision date. Example: "CNMP 2-1-2017" or "FMP 11-21-2016"	Participant	Agreement	For CAP contracts only, the CAP with signature page must be uploaded prior to payment. The CAP must be one file which might require pdfs to be combined.
		X	Practice and Enhancement Checkout or Certification	Certify (Agreement Item)	Design/Certify	Enter the type of document and the checkout date. Examples: ●340 job sheet 2-1-2018 ●E590130Z job sheet 6-4-2018	N/A	Agreement Item	<b>CSP Enhancements:</b> ●General 2017-1, Renewal 2018-1, and prior contract years - upload documentation required. ●General 2018-1, Renewal 2019-1, and subsequent contract years - upload the job sheet page with the "NRCS Documentation Review" section completed. <b>CSP and EQIP Practices:</b> Upload the applicable documents for checking out a practice. Emails from technical specialist stating the practice met standards are not to be uploaded.

\* = document may or may not be needed

\*\* = for each participant, one or the other document required, not both.