

Activating Vendor Steps



This document pulls the written instructions for entering vendor information and checking for active vendor from Appendix B of the CSP 2018-1 Obligation Process document on SharePoint and adds illustrations to those instructions.

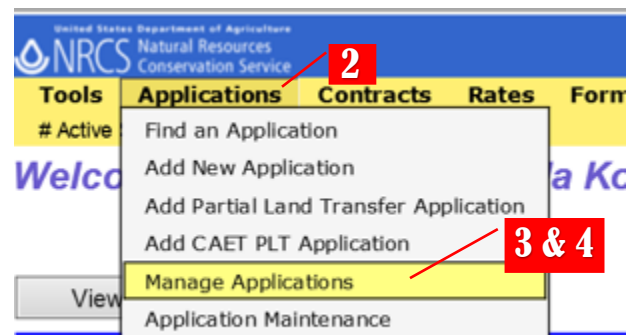


For an overview of how the SF1199A Direct Deposit form should be filled out, refer to Appendix A of the CSP 2018-1 Obligation Process document on SharePoint.



Prior to Activating a Vendor, NRCS State Office will have informed Field Offices of the applications that have been pre-approved, they will have changed the application status in ProTracts to Pre-approved, and you will have sent a letter and a SF-1199A Direct Deposit form to each pre-approved application. When the applicant has returned the SF-1199A Direct Deposit form (or the alternative NRCS-FNM-60 Hardship EFT Waiver form), you are ready to active their vendor. Activating the Vendor is the first step in obligating a contract. This step **MUST** be completed, and the vendor **MUST** be active before any of the other obligation steps can be done.

Exhibit 1: Activating Vendor Steps

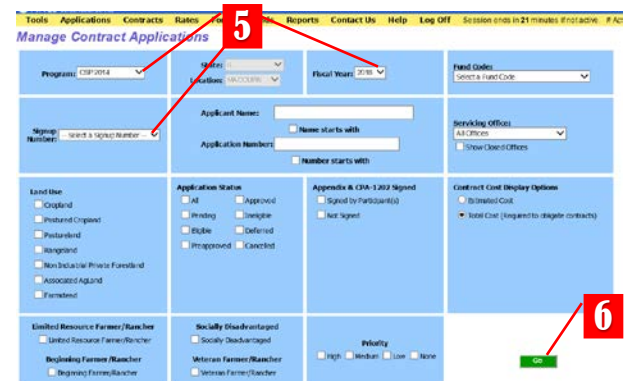


Before following the NRCS instructions below, you will need to open the application...

OPEN THE APPLICATION

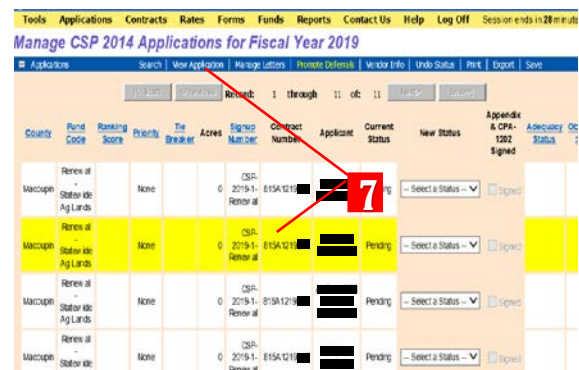
1. [Login to ProTracts](#) (e-Authentication site)
2. Point to the APPLICATIONS tab on the yellow bar
3. Scroll down the list of options and highlight either FIND AN APPLICATION or MANAGE APPLICATIONS.
(If you know the application number, FIND AN APPLICATION is a useful way to find it fast.)
4. Left-click on MANAGE APPLICATIONS

Exhibit 2: Activating Vendor Steps



5. On the MANAGE APPLICATIONS screen, use the drop-down menu to select the PROGRAM, and the FISCAL YEAR (for CSP you also have to select the SIGNUP NUMBER) as minimum filtering criteria. You can also use any of the other filtering criteria.
6. When you are done selecting your filtering criteria, click on the green GO button to open the list of your filtered applications.

Exhibit 3: Activating Vendor Steps



7. Once you have the list of your filtered applications, Scroll down to find the application you want to open and click on it to hi-light it. You can either double-click on the hi-lighted application or you can click on VIEW APPLICATION to open the application.

ENTER VENDOR INFORMATION

To enter or verify vendor data, complete the following:

- Select **Applicant Info** in the application screen
- Click on box to the left of the participant name to active the Vendor Info button
- Click the **Vendor Info** button
- Determine if:
 - Vendor data exists – proceed to Step “e” below.
 - No vendor data – proceed to Step “i” below.

Exhibit 4: Activating Vendor Steps

Exhibit 5: Activating Vendor Steps

Vendor
Data Exists

No Vendor
Data

Vendor data already exists for participant

- Click on the vendor data (the line will highlight yellow)
- Click on **Edit Vendor**
- Verify all data and make any necessary corrections
- Proceed to Step “m” below to ensure the Vendor Code status is showing properly in Applicant Info

Exhibit 6: Activating Vendor Steps

No Vendor Data for Participant

- i. Click on the participant's name and highlight the line yellow, this will activate the New Vendor button.
- j. Click on **New Vendor** and enter direct deposit data using a completed SF-1199A form.
 1. Vendor name - the name for the individual or entity exactly as it appears on their tax returns.
 2. Vendor address – address where the IRS form 1099 will be mailed. Also, if a hardship waiver, where the check will be mailed.
 3. Direct deposit - enter information for account type, routing number and account number.
- k. Click **Request Vendor Code** and **OK** on Message box– Close the Contract Participants and Vendors window. Initially the vendor code will have a Pending status, and it will take a few days for the vendor to become Active.
- l. After a few days, proceed to Step “m” below to ensure the Vendor Code status is showing properly in Applicant Info.

Exhibit 7: Activating Vendor Steps

Exhibit 8: Activating Vendor Steps

CHECK TO SEE IF VENDOR IS ACTIVE

Follow Steps 1-7 above to open the application and Step a. of **Enter Vendor Information** above to open the Applicant Info screen.

Vendor Code Status

- m. Ensure the Vendor Code status is “Active” and Direct Deposit is checked **in the Applicant Info screen**, otherwise applications cannot be “Approved”. For hardship waivers, the Vendor Code status is “Active” and the Direct Deposit is not checked. If not showing correctly, do the following:

Incorrect

Vendor Code: NO VENDOR CODE

Direct Deposit: ☐

Correct

Vendor Code: Active

Direct Deposit: ☒

1. In Applicant Info, click on box to the left of the participant name.
2. Click the **Vendor Info** button
3. Click on the vendor data (the line will highlight yellow). The selected vendor code will be linked to this contract.
4. Then click **OK**.
5. Click **Save** on the Applicant Info screen
6. When the user returns to the Applicant Info screen, the data should be populated correctly.

Exhibit 9: Activating Vendor Steps

Exhibit 10: Activating Vendor Steps

Exhibit 11: Activating Vendor Steps

Resolving a Rejected Vendor

To view the reason for a rejected vendor code is go into **Edit Vendor** and view the **Vendor Rejection Information** below the Deposit Information section.

Contract Participants and Vendors

New Vendor Assign Payment Edit Vendor OK Cancel

Vendor	Vendor	Payee Name	Address	City	ST	Deposit Account
Status	Request ID Number	Request ID Number	Request ID Number	Request ID Number	Request ID Number	Request ID Number
Request ID Number	Request ID Number	Request ID Number	Request ID Number	Request ID Number	Request ID Number	Request ID Number

*The participant must have an active vendor record before a vendor can be processed for the contract.

Assignments of Payment and Vendors

Vendor Rejection Information
TIN Match Failure

Name and Address

Name: RHONDA KOEHNE

TaxID/SSN: [REDACTED]

Contractor ID: 123456

Address: 123 BOX 99

City: RICHMOND

Country: USA

State: IN

Zip Code: 46202

Deposit Information

Direct Deposit to Account Type: ☒ Checking ☐ Savings

Bank Information: Routing Number: [REDACTED] Account Number: [REDACTED]

Direct Deposit Waiver: ☐ Direct Deposit Waiver

Waiver Information: Waiver Reason: [REDACTED]

Vendor Rejection Information

To resolve problems, verify the following with the participant:

- The SSN or Tax ID is correctly entered into FSA's Business Partner application.
- The vendor name must be the business name or individual's name that is on-file with the IRS. The name entered for the vendor name must match the IRS database exactly. The following are tips for ensuring the vendor name is correctly entered:
 - i. Have the participant verify spelling. It might be helpful to obtain a document sent by the IRS to the participant to see the name used by the IRS or a copy of the applicant's 1040 form.
 - ii. Use exact names, no nicknames, and legal names only. For example, J Randall Smith is not the same as James R Smith.
 - iii. Use exact version of name, especially business names, registered with the IRS including the same abbreviations for Corporation, LLC, etc.
 - iv. Use punctuation judiciously. The IRS database has no punctuation.
 - v. There is a 26 character limitation in the NFC database and vendor record. If the name won't fit in a 26 character name field then it should overflow into the address1 field.

Process for re-submitting rejected vendors. Users should not continually resubmit a rejected vendor without following the above guidelines.

If the initial vendor request rejects, contact the participant and verify the information (following the information above). Make needed adjustments and re-submit the vendor.