

Creating Letters or Mailing Lists for ProTracts Applications or Contracts

Introduction:

The Manage Letters function in ProTracts can be used to produce letters from ProTracts using existing ProTracts templates through Word or to export an Excel mailing list for either contracts or applications.

Overview:

Manage Letters and Mailing Lists for Applications ([Page 1](#))

Manage Letters and Mailing Lists for Contracts ([Page 4](#))

Microsoft Mail Merge Guidance ([Page 7](#))

Annual Practice Reminder Letter ([Page 8](#))

Application Directions:

1. Perform Application Query

Manage Letters is accessed through the Manage Applications screen (see Image 1). Use any of the searching mechanisms to query the applications for which the letter or mailing list is needed.

Image 1- Manage Applications Screen

Manage Contract Applications

Program: <input type="text" value="Select a Program"/>	State: <input type="text" value="IL"/> Location: <input type="text" value="All Locations"/>	Fiscal Year: <input type="text" value="Select a Year"/>	Fund Code: No Fund Code Available
Priority <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low <input type="checkbox"/> None	Applicant Name: <input type="text"/> <input type="checkbox"/> Name starts with Application Number: <input type="text"/> <input type="checkbox"/> Number starts with	Servicing Office: <input type="text" value="All Offices"/> <input type="checkbox"/> Show Closed Offices	
Date Range Start Date: <input type="text"/> End Date: <input type="text"/>	Application Status <input type="checkbox"/> All <input type="checkbox"/> Not Eligible <input type="checkbox"/> Pending <input type="checkbox"/> Disapproved <input type="checkbox"/> Eligible <input type="checkbox"/> Deferred <input type="checkbox"/> Preapproved <input type="checkbox"/> Cancelled <input type="checkbox"/> Approved	CPA-1202 Signature Status <input type="checkbox"/> Signed by Participant(s) <input type="checkbox"/> Not Signed	Contract Cost Display Options <input type="radio"/> Estimated Cost <input checked="" type="radio"/> Total Cost (Required to obligate contracts)
Contract Amount <input type="checkbox"/> \$150,000.00 and greater	Limited Resource Farmer/Rancher <input type="checkbox"/> Limited Resource Farmer/Rancher	Beginning Farmer/Rancher <input type="checkbox"/> Beginning Farmer/Rancher	<input type="button" value="Go"/>

2. Access Manage Letters

Adjacent to the view application button is the Manage Letters button (see Image 2), click to access manage letters. In the case of applications, the application needs a particular status for the Manage Letters to activate which includes ineligible, preapproved, deferred, or pending.

Image 2 - Manage Letters for Applications
Manage EQIP 2002 Applications for Fiscal Year 2007

County	Fund Code	Ranking Score	Priority	Tracking Code	Contract Number	Applicant	Current Status	New Status	CPA-1202 Signed	Contract Cost	Cumulative Calculated Cost
Champaign	Applications Not Related to Livestock	104.32	None		745A12071TJ	JEFFREY G STOTT	Deferred	-- Select a Status --	<input type="checkbox"/> Signed	\$0.00	\$0.00

3. Make Letter Selection

From the “Letters” drop down list select a letter template or mailing list for applications (see Image 3).

Image 3 - Select a Letter Option for Applications

Buttons: Select All, Unselect All, OK, Cancel

Letters: Select a Letter

- Select a Letter
- Preapproved
- Pending
- Ineligible
- Deferred
- AGI Ineligible Members
- Mailing List
- Beginning Farmer/Rancher Review Letter
- Limited Resource Farmer/Rancher Review Letter

4. Select Participant(s)

After a letter or mailing list selection is made, the participants and their application number will appear. For participants (decision maker) with multiple addresses, their name will show up in blue (see Image 4). Before letters are produced for participants, one address must be selected for Manage Letters to work for that participant. Click on the blue name and select the address to be used for the letter (see Image 5).

Next, select participant(s) for which a letter will be produced. The participants can be selected individually by clicking on each entry and highlighting the entry yellow or the “Select All” button can be used. Finally click the OK button (see Image 6).

Image 4 - Example of a Participant with Multiple Addresses

Buttons: Select All, Unselect All, OK, Cancel

Letters: Ineligible

Participant	Contract Number	Program
<u>JIM ELLIS</u>	745A1208Y52	EQIP 2002
KEITH BUDDY	745A1208LM3	EQIP 2002

Participant with multiple addresses

Image 5 - Select One Address

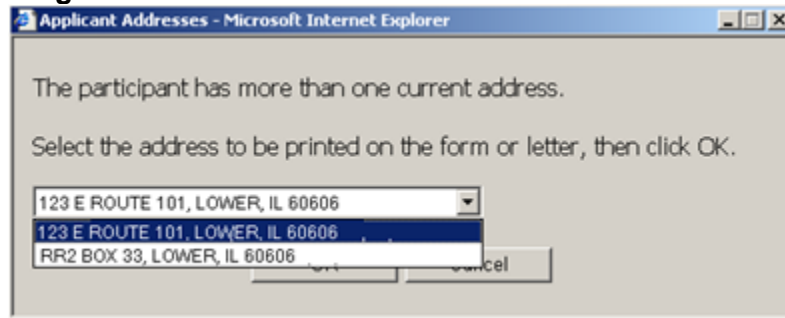
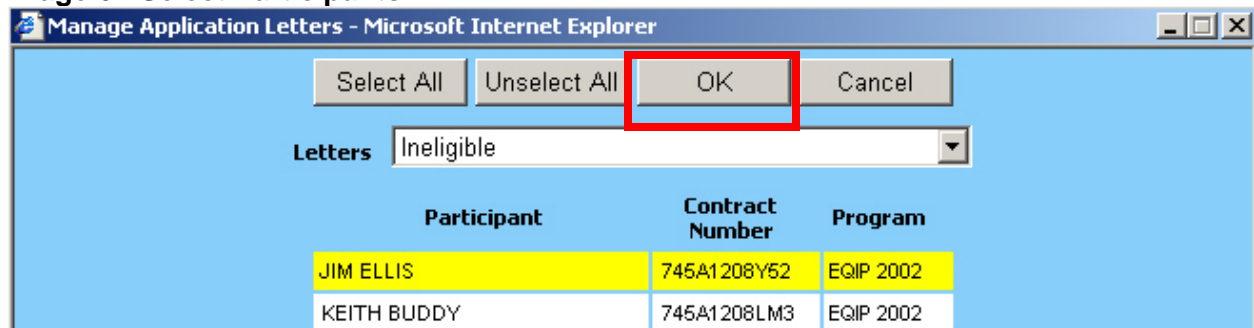


Image 6 - Select Participants

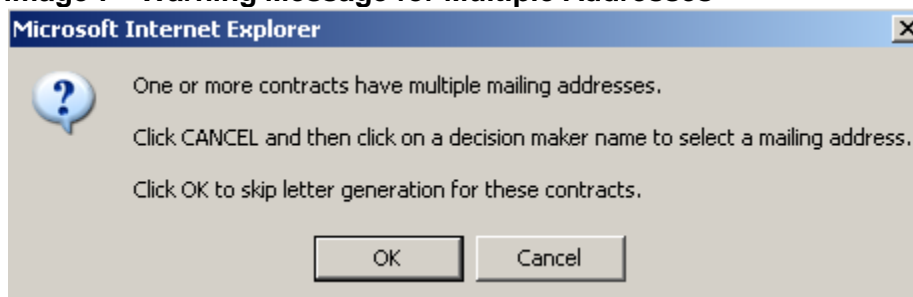


5. Open or Save File

Next users will have the option to open or save the file created. A Word document will be created for letters and the participant and office information will be auto-filled. For mailing lists, an Excel document will be created that can be mail merged with any letter or used to create labels.

If the multiple addresses shown by the name in blue were not dealt with, a warning message will be shown notifying the user to select one address otherwise that participant will be skipped and no letter created (see Image 7).

Image 7 - Warning Message for Multiple Addresses



6. Producing Letters/Mailing List for More than 50 Applications

The letters will be limited to the 50 applications on the screen. To produce letters or a mailing list for the additional applications (51-100 and 101-150, etc) that resulted from the query, click to the next page of results (see Image 8) and repeat steps 2 through 5.

Image 8 - Advance to Additional Applications Returned

Manage EQIP 2002 Applications for Fiscal Year 2008

Applications Search View Application Manage Letters Promote Deferrals Vendor Info Sign Contract Assign Tracking Codes Undo Status Print

<<Start <Previous Record: 1 through 50 of 61 Next> End>>

County	Fund Code	Ranking Score	Priority	Tracking Code	Contract Number	Applicant	Current Status	
Coffee	General EQIP		None		745A1208GG3	GEORGE GLASS	Pending	-- Select a Status -- Signed Pending \$400.00

Advance to application results 51-100

Contract Directions:

1. Perform Contract Query

Manage Letters is accessed through the Manage Contracts screens (see Image 9). Use any of the searching mechanisms to query the contracts that the letter or mailing list will be needed. Some examples include:

- Practices to be implemented in a contract; (annual practice reminder letter option)
- Contracts that have expired or will expire shortly but are not complete; and
- Start a practice in the first year of the contract.

Image 9 - Manage Contracts Screen

Manage Contracts - Programs

Find Contracts | Name & Contract Number | **Programs** | Practices | Pending Actions | Maintenance | Clear Selections | Search

Program: All Programs | Fiscal Year: All | State: IL | Counties | Field Offices | Locations: Henry | GO

Contracts Status: ☐ All, ☐ Active, ☐ Completed, ☐ Cancelled, ☐ Terminated

Contract Amount: ☐ \$150,000.00 and greater

2. Access Manage Letters

Above the query results is the Manage Letters button, click to access manage letters (see Image 10).

Image 10 - Manage Letters for Contracts

Contracts Returned: 1 - 50 of 65

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Contracts							View Contract	Expand Items	Collapse Items	Manage Letters	Totals	Export
	State	County	Field Office	Participant	Contract Number	Status						
+	IL	CHAMPAIGN	CHAMPAIGN SERVICE CENTER	MILO SMITH	745A126Z000	Active						
+	IL	CHAMPAIGN	CHAMPAIGN SERVICE CENTER	JUNCTION FARM LLC	745A126Y001	Active						

3. Make Letter Selection

From the "Letters" drop down list select a letter template or mailing list for contracts (see Image 11).

Image 11 - Select a Letter/Mailing List Option for Contracts

Manage Contract Letters - Microsoft Internet Explorer

Select All | Unselect All | OK | Cancel

Letters: Select a Letter

- Select a Letter
- Annual Practice Reminder
- Beginning Farmer/Rancher Review Letter
- Limited Resource Farmer/Rancher Review Letter
- Blank Letter
- Mailing List

4. Select Participant(s)

After a letter selection is made, the participants and their contract number will appear. For participants (decision maker) with multiple addresses, their name will show up in blue (see Image 12). Before letters are produced for participants, one address must be selected for Manage Letter to work for that participant. Click on the blue name and select the address to be used for the letter or mailing list (see Image 13).

Next, select participant(s) for which a letter will be produced. The participants can be selected individually by clicking on each entry and highlighting the entry yellow or the "Select All" button can be used. Finally click the OK button (see Image 14).

Image 12 - Example of a Participant with Multiple Addresses

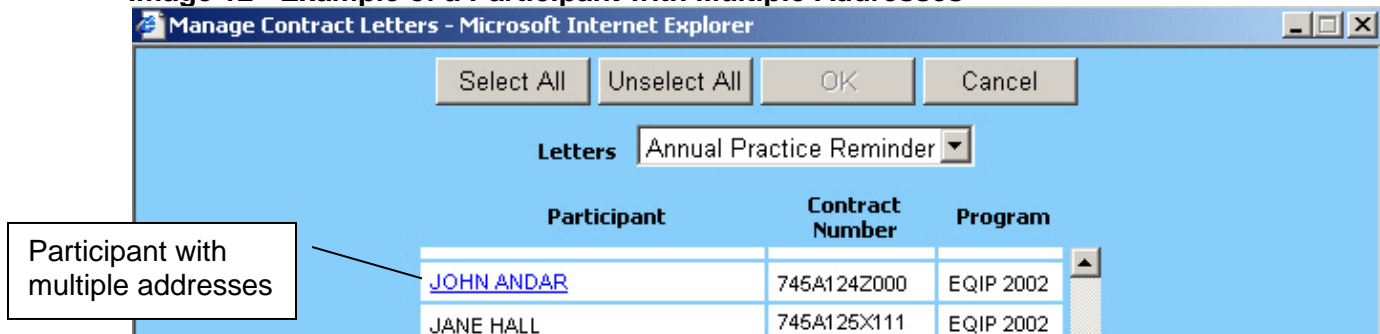


Image 13 - Select One Address

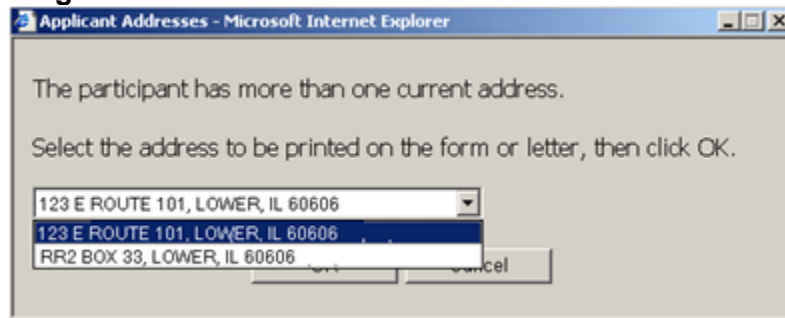
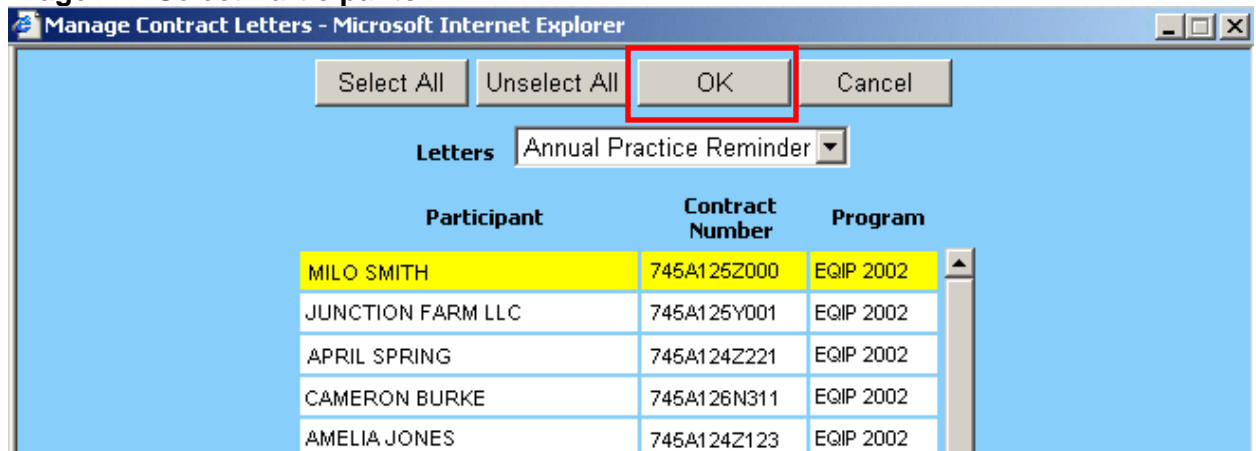


Image 14 - Select Participants

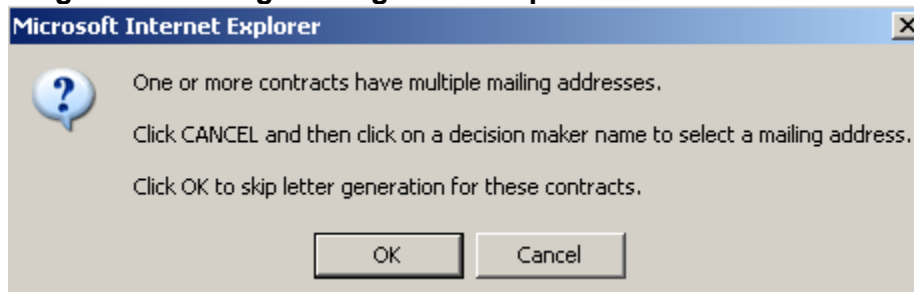


5. Open or Save File

Next users will have the option to open or save the file created. For letters, a Word document will be created and the participant and office information will be auto-filled. For mailing lists, an Excel document will be created that can be mail merged with any letter or used to create labels.

If the multiple addresses shown by the name in blue were not addressed, a warning message will be shown notifying the user to select one address otherwise that participant will be skipped (see Image 15).

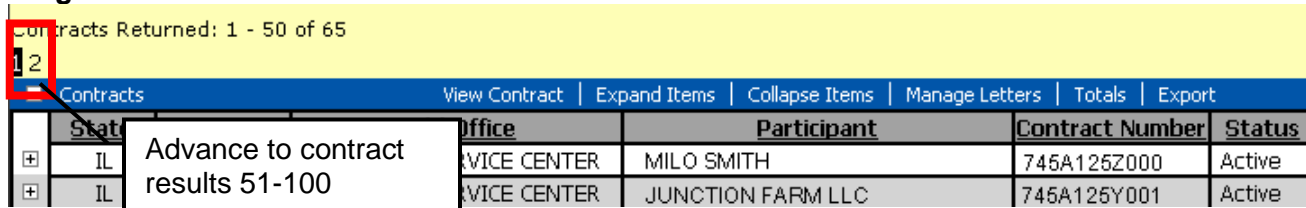
Image 15 - Warning Message for Multiple Addresses



6. Producing Letters/Mailing List for More than 50 Contracts

The letters or mailing list will be limited to 50 contracts. To produce letters or a mailing list for the additional contracts (51-100 and 101-150, etc) that resulted from the query, click to the next page of results (see Image 16) and repeat steps 2 through 5.

Image 16 - Advance to Additional Contracts Returned



Microsoft Mail Merge Guidance

For step-by-step directions of doing mail merges and labels use the Microsoft support website for directions on:

- Merge mailing list with letter
- Creating address labels from mailing list

<http://office.microsoft.com/en-us/support/>


Annual Practice Reminder Letter

The annual practice reminder letter will contain practices that are planned for the current calendar year and any other practices from prior years that have not been applied. Also, both planned and partial certified practices will be listed in the letter.

At the beginning of each calendar year, field office must produce the annual practice reminder letter and send it to the participant as a reminder of the practices scheduled for the year. (per: CPM 440 Part 512.61B)

Image 17 – Annual Practice Reminder Letter Example

United States Department of Agriculture


Natural Resources Conservation Service
QUINCY SERVICE CENTER
209 S. SEVENTH ST.
QUINCY, IL 62401-5207
Phone: (618) 229-4907 Fax: (618) 229-4969

11/4/2009

Mr. Contract Decision Maker
123 E FIRST STREET
SOMEWHERE, IL 61234

Subject: Annual Practice Reminder Letter
Dear Mr Decision Maker:

This letter is being sent to remind you of your obligation to install the following practice(s) under the contract terms of Program: EQIP 2002 and Contract Number #745A125B000.

Contract Item Number	Practice Name	Units Scheduled	Date Scheduled
1	Fence	15950	2009
8	Grade Stabilization Structure	3	2009
9	Underground Outlet	156	2009
10	Grade Stabilization Structure	2	2009
11	Underground Outlet	52	2009
13	Pipeline	4400	2009
14	Watering Facility (NO.)	6	2009

As stated in the contract, the practice(s) must be installed by the schedule noted above to remain in compliance with your contract obligations.

To assist you with practice installation, you may contact the Natural Resources Conservation Service (NRCS) or use a Technical Service Provider (TSP) listed at <http://techreg.usda.gov>. If you choose to hire a TSP, you must contact us to confirm the availability of funding for TSP assistance in your contract and to review the NRCS requirements before the TSP begins any work.

Please notify this office immediately if you anticipate any of the following changes:

- Loss of control of all or part of the land under contract
- Changes to your operation, including land use changes or enrollment in another program
- Changes to your banking information that will affect direct deposit of program payments
- Changes to the desired distribution of payment shares

Thank you for your interest and participation in our conservation programs.

Sincerely,

George Glass
District Conservationist

Helping People Help the Land
An Equal Opportunity Provider and Employer