Deferring CSP and EQIP Applications in ProTracts

The Conservation Program Contracting Manual, 440-CPM, Part 512.27 summarizes the steps to deferring unfunded applications. Below is detailed guidance on the deferral process in ProTracts.

Part A – Changing Status to "Deferred":
Field offices will defer all unfunded applications that have a "Pending" or "Eligible" status, and send deferral letters to the applicant, unless they have already talked to the applicant and know what the applicant wants to do with their unfunded application. The applicant's decision must be documented in the case file.

Changing Application Status to Deferred
1.   Choose Applications - Manage Applications from the main navigation bar.
2.   Select the following when performing a search:
      •   Program
      •   Fiscal Year
      •   Fund Code (optional)
      •   Application Status: Pending and/or Eligible (optional)
3.   Click Go to search for the applications.
4.   From the New Status drop-down menu select Deferred. Continue selecting deferred status for all applications to be deferred.
5.   Click Save on the Manage Applications menu bar to change the application(s) status to deferred.

Image 1 - Changing Application Status to Deferred

Part B – Send Deferral Letter to Applicant:

1.   Send the ProTracts generated deferral letter to the applicant.
2.   Refer to "Manage Letter" guidance for generating letters from ProTracts.

Part C- Promoting a Deferred Application:
Promoting must be completed after deferral letters have been sent, and the applicant has responded on how they would like to proceed with their unfunded application. If the applicant does not respond after 30 days, the application must be deferred to the next fiscal year.

Field offices must take one of the following actions:
      •   If the applicant wishes to cancel the application, the ProTracts status must be changed from "Deferred" to "Cancelled".
      •   If the applicant wishes to continue with the deferral of their application or does not respond, then the "Deferred" application must be promoted following the directions below.

Promoting a Deferred Application
1. Search for "Deferred" applications
2. Click on application to select it by highlighting the data yellow. (See Image 2)
3. Click on Promote Deferrals in the Manage Applications menu bar. (See Image 2)
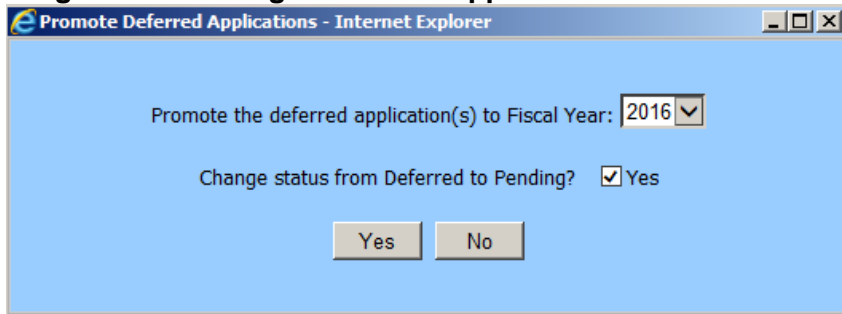
Image 2 - Promote Deferrals Activated

4. The "Promote Deferred Applications" box will open (See Image 3). The following must be completed:
    a. Click the Fiscal Year drop-down arrow and select the new fiscal year.
    b. Check the box for "Change status from Deferred to Pending?"
5. Click Yes, to defer the application.

Image 3 - Promoting a Deferred Application

6. Repeat steps for Promoting a Deferred Application for all other applications with a Deferred status.

Note: When a deferred application is promoted, the following data is removed from the application:
- Ranking and ranking score
- Fund Code
- Payment Schedule
- Contract/Application Number
- Contract Items (if contract items were uploaded to the application)
- Tracking Code (if a tracking code was assigned)