

EQIP 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 [Flowchart for Active Contracts: Payments](#) 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.



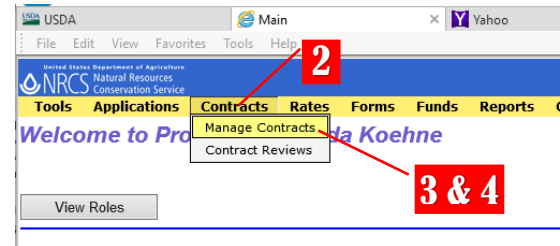
For **EQIP** contract payments, SWCDs should complete all three ProTracts payment tasks of **Print Payment Documents for Participant Signatures**, **Enter Signature Dates for Payment** and **Print Approved NRCS-CPA-1245**.

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

OPEN THE CONTRACT

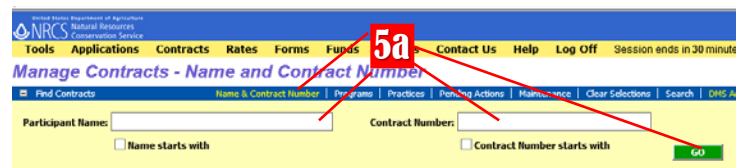
1. [Login to ProTracts](#) (e-Authentication site)
2. Point to the CONTRACTS tab on the yellow bar
3. On the drop-down list, highlight MANAGE CONTRACTS.
4. Click on MANAGE CONTRACTS

Exhibit 1: EQIPContract Payment Steps for SWCDs



- 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.

Exhibit 2: EQIP 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.

Exhibit 3: EQIP Contract Payment Steps for SWCDs

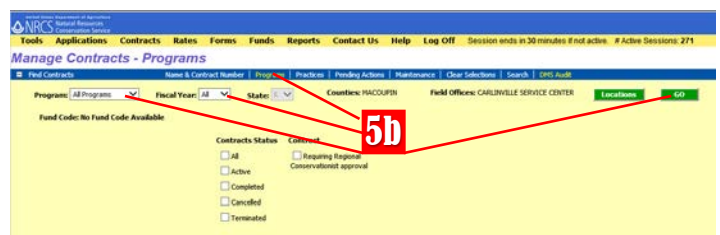


Exhibit 4: EQIP Contract Payment Steps for SWCDs

6. 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.

Contracts Returned: 1 - 9 of 9

Program	State	County	Field Office
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER
EQIP 2014	IL	MACOUPIN	CARLINVILLE SERVICE CENTER

Red arrow points to the third row (labeled 6).

PRINT PAYMENT DOCUMENTS FOR PARTICIPANT SIGNATURES

Before you print the payment documents for participant signature for EQIP contracts, NRCS will verify which of the contract items are complete and then certify those completed contract items in ProTracts.

Note: During the planning process, Toolkit assigns numerical identifiers to each contract item (i.e. 1, 2, 3, etc.). Those numbers are called Contract Identification Numbers (CINs). CINs can have sub-components, that are labeled with small letters (i.e. a, b, c, etc.) ALL sub-components of a CIN must be completed in order for the CIN to be certified for payment.

Once the items are certified, NRCS should communicate to SWCDs which CINs are ready for the payment document to be printed to obtain participant signatures.

1. Open the contract by following Steps 1-6 under **Open the Contract** above.
2. On the Contract screen, click on CERTIFICATION AND PAYMENT in the lower half of the screen.

Exhibit 5: EQIP Contract Payment Steps for SWCDs

3. In the CERTIFICATION window, click on PRINT FORM.

Exhibit 6: EQIP Contract Payment Steps for SWCDs

4. In the PAYMENT APPLICATIONS window, click to high-light the line of the payment application which contains the contract items (CINs) of the payment form you need to print.
5. Click on PRINT COMPONENTS.

Exhibit 7: EQIP Contract Payment Steps for SWCDs

Payment Application	Date	Participant Certification	Contract Items	Components
1	5/21/2018		18, 21, 23	18a, 21a, 23a
2	7/13/2018		22, 24	22a, 24a, 24c, 24d
3	10/22/2018		1, 2, 3, 4, 6, 7, 8, 19, 20, 27	1a, 2a, 3a, 4a, 6a, 6b, 6c, 7a, 7b, 8a, 19a, 20a, 27a

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 8: EQIP Contract Payment Steps for SWCDs

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

Yes No

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 CERTIFICATION AND PAYMENT in the lower half of the screen.

Exhibit 9: EQIP Contract Payment Steps for SWCDs

The screenshot shows the 'Practice' screen in the ProTracts system. The 'Certification and Payment' tab is selected, indicated by a red arrow and a red '2'. The screen displays fields for 'Item' (1), 'Year' (2018), 'Estimated Cost-Share' (\$155), 'Cost Share Cap', 'Practice' (Critical Area Planting), 'Code' (342), and 'Units' (ac). A 'Narrative' box contains text about establishing perennial vegetation. The 'Fund Code' field is also visible.

3. In the CERTIFICATION window, use the ITEM drop-down menu to select the first (or maybe the only) item (CIN) number listed on the signed NRCS-CPA-1245.
4. Using the mm/dd/yyyy format, enter the date the participant signed the NRCS-CPA-1245 in the PARTICIPANT SIGNED NRCS-CPA-1245 DATE box.
5. Click SAVE
6. Repeat Steps 3 through 5 for **each** of the CINs on the signed NRCS-CPA-1245.

Exhibit 10: EQIP Contract Payment Steps for SWCDs

The screenshot shows the 'Practice Certification' window. A red arrow points to the 'Practice Certification' tab, labeled with a red '3'. The window displays fields for 'Item' (1), 'Practice' (Critical Area Planting), 'Units' (ac), 'Planned' (1.1), 'Applied' (1.1), 'Inspection Date' (10/22/2018), 'Certified by' (CHRISTINE GOLDSTEIN), 'Certified Date' (10/22/2018), 'Participant Signed NRCS-CPA-1245 date' (10/22/2018), 'Reviewed by', 'Reviewed Date', 'Approved by', and 'Approved Date'. A red arrow points to the 'Participant Signed NRCS-CPA-1245 date' field, labeled with a red '4'.

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 CERTIFICATION AND PAYMENT in the lower half of the screen.

Exhibit 11: EQIP Contract Payment Steps for SWCDs

Practice View by Year | New NC Item | Add Components | Check Rules | Delete Item | Certification and Payment | < Previous Item

Item: 1 Year: 2018 Estimated Cost-Share: \$155 Cost Share Cap:

Practice: Critical Area Planting Code: 342 Units: ac

Narrative: Establish perennial vegetation on highly erodible or critically eroding areas to stabilize the soil, reduce damage from sediment and runoff to downstream areas, and improve wildlife habitat and visual resources. Establish selected species

Fund Code:

Exhibit 12: EQIP Contract Payment Steps for SWCDs

3. In the CERTIFICATION window, click on PRINT FORM.

Practice Certification

Item: 1 Practice: Critical Area Planting Units: ac Planned: 1:1 Applied: 1:1 Item Status: Certified

Completion: ☒ Completed ☐ Pending ☐ No

Certify Practice: ☒ Yes ☐ No

Inspection Date: 10/22/2018 Payment Status: Eligible

Participant Signed: CHRISTINE

Exhibit 13: EQIP Contract Payment Steps for SWCDs

4. In the PAYMENT APPLICATIONS window, click to high-light the line of the payment application which contains the contract items (CINs) of the payment form you need to print.
5. Click on PRINT COMPONENTS.

Payment Applications - Internet Explorer

Add Delete Print Contract Items Print Components Cancel

Payment Application	Date	Participant Certification	Contract Items	Components
1	5/21/2018		18, 21, 23	18a, 21a, 23a
2	7/13/2018		22, 24	22a, 24a, 24c, 24d
3	10/22/2018		1, 2, 3, 4, 6, 7, 8, 19, 20, 27	1a, 2a, 3a, 4a, 6a, 6b, 6c, 7a, 7b, 8a, 19a, 20a, 27a

6. 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 14: EQIP Contract Payment Steps for SWCDs

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

Yes No

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 or 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.

