

ProTracts Home – <https://prohome.nrcs.usda.gov/>

- Link to ProTracts Training Site – *under “I Want To...” box in the upper right corner*
- Link to Protracts (the actual website) – *under “I Want To...” box in the upper right corner*
- Link to DMS (the actual website) – *under “I Want To...” box in the upper right corner*
- Link to Fund Manager – a variety of reports dealing with contract funds—payment history, vendor info, payment limitations, payment eligibility, AGI eligibility – *under “I Want To...” box in the upper right corner*
- Link to FA Tracker – a variety of reports to help field office determine status of contracts—pending payments, pending obligation, modification status, off-schedule contracts, waiver status, signatures needed,

ProTracts – <https://protracts.sc.egov.usda.gov/protracts/default.aspx>

- Print blank program forms – *under the **FORMS** tab in the yellow bar across the top*
 - Print blank EQIP and CSP applications and appendixes
 - Print blank SF1199A forms (direct deposit forms)
 - Print blank Power of Attorney form
- Run a number of summary reports – *under the **REPORTS** tab in the yellow bar across the top*
- Work with program applications – *under the **APPLICATIONS** tab in the yellow bar across the top*
 - Find an application that has already been loaded in the system
 - Enter new EQIP and CSP applications
 - Mange applications –
 - Check for eligibility issues such as AGI
 - Send application-type letters (Deferral letters/Pre-approval letters/Waiver letters)
 - Change application status (Cancel application/Defer application/Eligible application)
 - Enter applicant’s vendor (banking) information for direct deposit
 - Enter producer signature date when obligating the application
- Work with program contracts – *under **CONTRACTS** tab in the yellow bar across the top*
 - Find contracts that have already been approved (made a contract)
 - Manage contracts –
 - Send contract-type letters (Annual Practice Reminder letter/Review letters/CSP renewal notification letters)
 - Print payment forms (CPA-1245)
 - Enter producer signature date for payment forms
 - Print contract modification forms (CPA-1156)
 - Enter producer signature date for modifications
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- Get help with ProTracts – *under the **HELP** tab in the yellow bar across the top*
 - How-Tos on some basic Protract tasks – pretty generic
 - Section on Frequently Asked Questions

DMS – <https://dms.sc.egov.usda.gov/DMS/Splash.aspx>

- Upload Documents
 - Note: Some documents don't get uploaded by using the scanning method below. They can be uploaded digitally (and sometimes automatically) from ProTracts, Toolkit, CAET (CSP planning tool), etc. – **NRCS employees will mostly be the ones doing this type of upload**
 - Some documents need to be uploaded manually by scanning (RICOH scanner) to create a pdf, saving the pdf to the computer, and uploading the saved pdf to DMS – **this will be us, the PSS**
 - We upload pending documents so that applicants & participants can view and electronically sign them (through their Client Gateway e-authentication login)
 - We upload completed, scanned documents so NRCS Area & State office can view/review/approve/electronically sign the application documents, contract documents, modification documents, payment documents, etc.
- Search to see what documents have been uploaded
 - We can search by Agreement to see what documents that are associated with agreements have already been uploaded (and which ones still need to be uploaded)
 - We can search by Client to see what documents that are associated with clients have already been uploaded (and which ones still need to be uploaded)

SharePoint – https://usdagcc.sharepoint.com/sites/nrcs_illinois/swcd/SitePages/Home.aspx

- Access information about Financial Assistance (FA) programs – *under **FA PROGRAMS** tab across the top*
 - We can find a number of documents that pertain to the tasks we will perform – *under **DOCUMENTS** down the left-hand side (Note: make sure you are on the **FA PROGRAMS** tab from across the top)*
 - **CSP Reinvention** – pdf of contract, pdf of Appendix, DUNS & SAM fact sheet,
 - **EQIP** –
 - **RCPP-EQIP** –
 - **DMS** – DMS Upload Table (latest spreadsheet on what documents need uploaded to DMS), DMS User Guide, Guidance on using the DMS
 - **ProTracts Guidance** – Creating letters or mailing lists for ProTracts applications & contracts, folder on Modifications, folder on payments
 - **Contract Management** – CSP Reminder Letter Template
 - **Program Policy** –
 - **Project Upload** –
 - **Quality Assurance** –
 - **Shared Documents** –
 - We can look at a list of FA Program items on this website – *under **LISTS** down the left-hand side (Note: make sure you are on the **FA PROGRAMS** tab from across the top)*
 - A list of all the FA Program items which include documents listed above
 - FA Program Calendar – calendar to see program deadlines, cut-offs, etc.