Steps for Using EQIP – FA incentive to fund Conservation Activity Plan (CAP) development using producer-hired Technical Service Providers (TSPs)

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1. **(Field Office)** – A producer is interested in EQIP-FA initiative to fund CAP development using producer-hired TSP, and completes application for program participation (CCC-1200). The producer establishes records at the local Farm Service Agency office. If the producer has already established records, they should update if needed.

    a. NRCS field staff completes all program eligibility determinations. If client is eligible for program participation, proceed to the following steps:
        1) Determine payment rate for CAP from the Program Payment Schedule.
        2) Review with producer the CAP initiative payment rate and the TSP hiring process that she/he must use to hire a TSP certified in “TechReg” for the CAP for which they are applying.

    b. If the producer wishes to proceed, Field Office (FO) will:
        1) Develop EQIP CAP contract for producer.
        2) Provide producer copy of the CAP document from Section III of eFOTG which lists required deliverables for the CAP.
        3) Notify client to hire TSP certified in Maine for CAP from TechReg at: http://techreg.usda.gov/CustLocateTSP.aspx
        4) Client may provide farm information to TSP directly, or may grant permission for release of information to TSP by NRCS. If client agrees to release information, assist client to fill out and sign “Authorization and Release of Information” at http://directives.sc.egov.usda.gov/OpenNonWebContent.aspx?content=26871.wba . On the form, print TSP name and their TechReg ID Number TSP-X-XX-XXX. Place original signed copy in file and provide two copies to client (one for TSP).
        5) Provide client and/or TSP with signed permission copies of Common Land Units (CLUs) and “At-Risk” Wildlife maps covering CLUs.

2. **(Client, TSP and Field Office)** – Client contacts TSP and considers using the Assignment of Payment.

    a. Client and TSP agree on terms. It is suggested that client have a contract with the TSP that refers to the CAP Criteria which details the deliverables.

3. **(TSP)** – TSP will visit property.

    a. TSP will make on-site visit, and get client-TSP contract signed, and a copy of the “Authorization and Release of Information” from step 1(b)(4).
    b. TSP completes necessary walk-over of land and gathers other information to complete the CAP.

4. **(TSP)** – TSP completes the CAP.

5. **(TSP/Client)** – TSP completes certification statement on cover sheet of CAP.

a. TSP, per deliverables, produces two hard copies of CAP and reviews it with the client. TSP obtains client's signature on cover page of both copies and leaves both copies with client.
b. TSP, per deliverables, also produces two digital copies of CAP and leaves both copies with producer.
c. TSP provides invoice to client for CAP.

6. **(Client)** – Delivers documents to Field Office:

   a. One hard copy and one electronic copy of CAP and Certification Statement and invoice.

7. **(Client and Field Office)** – Payment request.

   a. The client completes their portion of CPA-1245 Form, Request for Payment.
   b. NRCS employee reviews deliverables using checklist for CAP. If CAP has all required items, sign checklist, sign acceptance line on cover of CAP, and process payment. If CAP does not have all required items, contact State Resource Conservationist. Field Office staff prepares NRCS-CPA-1245 and processes payment.
   c. Completed NRCS-CPA-1245 is scanned into contract payment folder on Field Office Shared Drive.
   d. NRCS employee or Program Assistant sends email to Caren Roy, Financial Technician (with copy to Susan Arrants, Management Analyst/Operations stating that payment is ready for second level review (i.e. mail will contain the following):
      - Client name
      - Contract number
      - Primary TSP
      - If applicable, secondary TSP

8. **(Field Office)** – CAP processing.

   a. One hard copy of the signed CAP is placed in NRCS/SWCD official files.
   b. The Toolkit customer folder is checked out from the NCP Database and the CAP digital file is placed into C:/Customer Files Toolkit/Customer File/CAP.

9. **(Field Office)** – Develop CPA-52 for CAP

10. **(State Office)** – Tracks TSP completed actions and performs Quality Assurance on reported CAP per policy.