Conservation Transaction Plug-In Application Workflow

1) The Conservation Transaction Plug-In process begins when the conservation program participant contacts the NRCS Service Center and fills out and signs the "Permission to Access Program Participant NCP Database Information for the TSP" form. This form will be posted on the TechReg site when available (not available as of 2/8/10).

   a) If there are other persons/entities that have interest in the land covered by the permissions, they will also need to sign a form granting permission.

   b) The participant does not need to visit the office if the information can be relayed over the phone or other means, but the original form and signature needs to be delivered to the office prior to granting permissions.

2) If a customer folder for the participant is not already in the database, NRCS field staff will create a folder and conservation plan file in Toolkit. The file will include Farm Service Agency (FSA) Common Land Unit (CLU) boundaries, if available. No additional information, such as attributing land units, is required.

3) The District Conservationist or State Geographer gives permission (through the Toolkit permissions site) to the TSP to access the folders and/or plans as specified by the permission form and enters the end date specified by the participant.

4) The participant and the TSP are contacted by NRCS and notified that permissions have been granted to the TSP giving access to the program participant's folders.

5) The TSP can then check out an eligible folder to develop or modify a conservation plan for the participant using the GeoAgro CPlanner software.

6) When the plan is complete, all documents and data required by the NRCS program (EQIP CAP for example) are checked back to the database by the TSP. A workflow status of "Pending Review" is automatically assigned to the plan in Toolkit.

7) The TSP contacts the NRCS Service Center to let them know that a plan has been checked in.

8) The District Conservationist looks at the plan data in Toolkit and uses the TSP button to review documents on the SharePoint site.

   a) If the information is complete, the transaction is approved by changing the workflow status to "Approved".

   b) If information is missing, for example the narrative field is not populated or a required document is missing, the workflow status is changed to "Pending Correction".

9) The TSP is notified that the plan is approved or needs more work.