

ProTracts – Hints & Tips

6. Updating Eligibility Elements In An Active Contract

Listed below are step-by-step instructions to create a report of Active contracts by field office and then update eligibility on contracts with eligibility problems.

1. Open ProTracts
2. Click on **Contracts**
3. Click on **Manage Contracts**

United States Department of Agriculture
Natural Resources Conservation Service

ProTracts Program Contracts System

Tools Applications **Contracts** Rates Forms Funds Reports Contact Us Help Log Off Session ends in 30 minutes if not active.

Active Sessions: 165

Manage Contracts
Contract Reviews

Welcome to ProTracts by T O Shishido

View Permissions

Release Notes Build 2.20 October 10, 2007

- The features that were temporarily deactivated during the year end shutdown have been restored including ability to make payments and modifications. See NB 440-7-15 for additional information at <http://directives.sc.egov.usda.gov/viewerFS.aspx?id=3422>
- Payment schedules may now be uploaded for EQIP. Training on this process will be provided on the October FAPD monthly net conference including process to upload multiple counties at once.
- FY08 Reserve sub-accounts have been created for states for EQIP. 2002 funding authority has been cancelled and any increases to obligations will be funded from this Reserve account; states manage the fund balance. Obligation increases as a result of modifications or change at payment in a current year (2008) contract will also be funded from the reserve account. Any deobligations from 2002 contracts will no longer be available.

4. Click on **Programs**

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Manage Contracts - Name and Contract Number

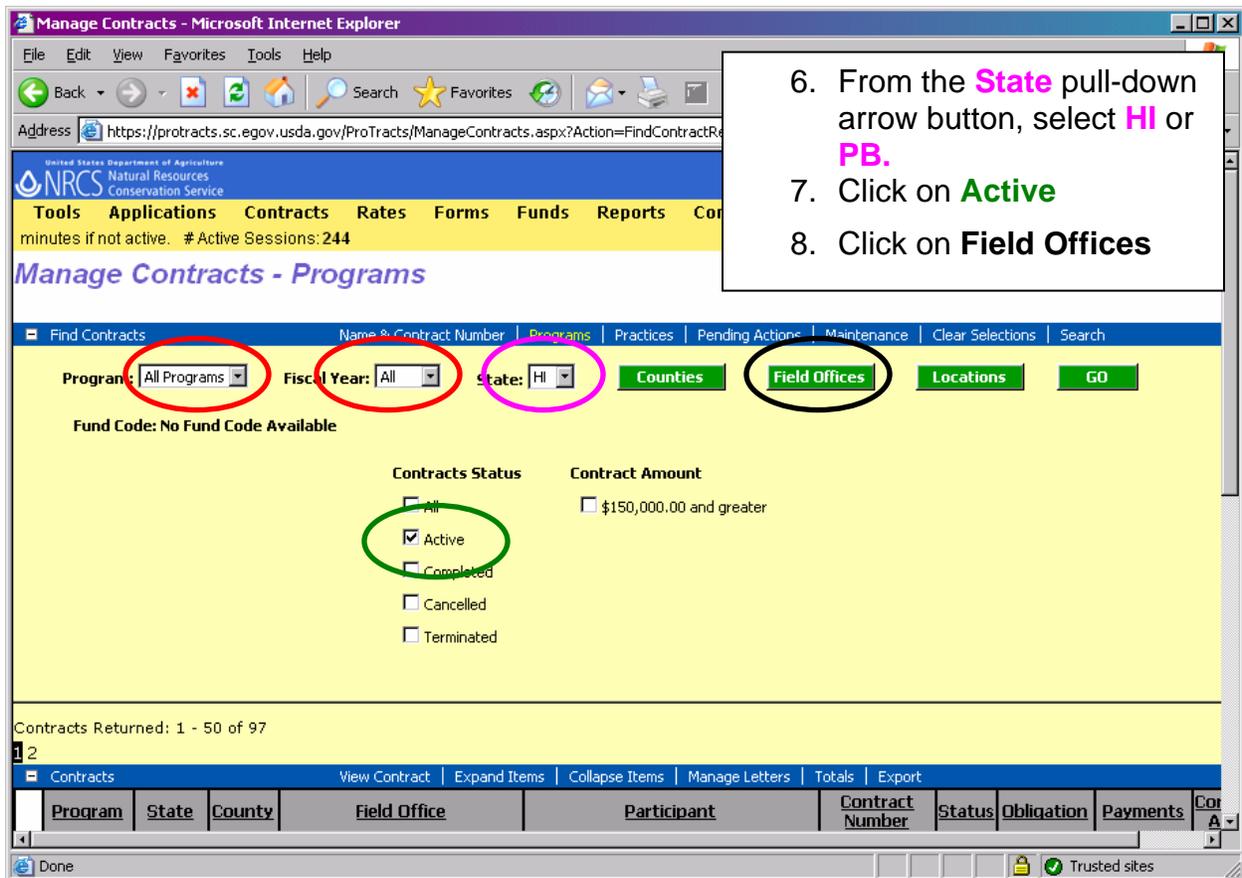
Find Contracts Name & Contract Number Programs Practices Pending Actions Maintenance Clear Selections Search

Participant Name: Contract Number: GO

Name starts with Contract Number starts with

6. Update Eligibility Elements In An Active Contract

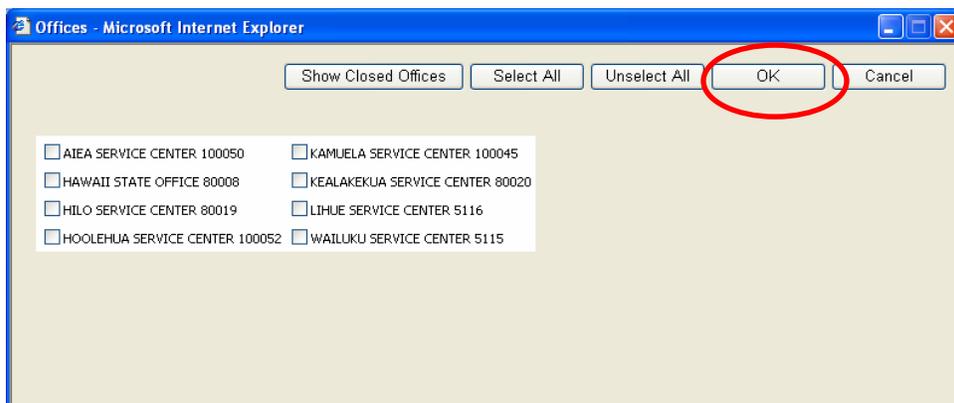
5. Keep defaults of **Programs** and **Fiscal Years**



9. Click on box for appropriate field office

10. Click on **OK**

11. Wait for processing to complete



6. Update Eligibility Elements In An Active Contract

12. A list of contracts is generated and appears at the bottom of the screen. You may choose to print the list for a working copy.

Click on Printer icon to print a screen shot
OR

Click on Export to export to Excel

Program	State	County	Field Office	Participant	Contract Number	Status	Obligation	Payments	Contract Acres
EQIP 2002	HI	HONOLULU	AIEA SERVICE CENTER			Active	\$3,675.00	\$0.00	1.0
CSP	HI	HONOLULU	AIEA SERVICE CENTER			Active	\$1,102.00	\$614.00	1.0
EQIP 2002	HI	HONOLULU	AIEA SERVICE CENTER			Active	\$92,959.25	\$5,465.25	112.0
CSP	HI	HONOLULU	AIEA SERVICE CENTER			Active	\$53,593.00	\$32,097.00	185.0
EQIP 2002	HI	HONOLULU	AIEA SERVICE CENTER			Active	\$3,710.00	\$0.00	0.7

13. If choose to export to Excel, use the two default selections:

- a. **All contracts returned**
- b. **Hierarchical (Items grouped beneath contracts)**

14. Click on **Export**

I want to export:

- All contracts returned
- Contracts appearing on this page only
- Selected (highlighted) contract only

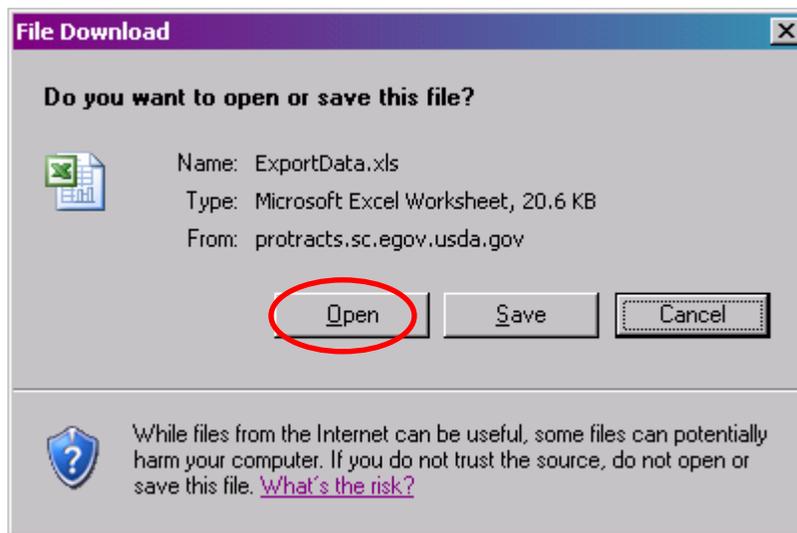
With the data in this format:

- Hierarchical (Items grouped beneath contracts)
- One line per contract and item (To allow sorting by items)

Export Cancel

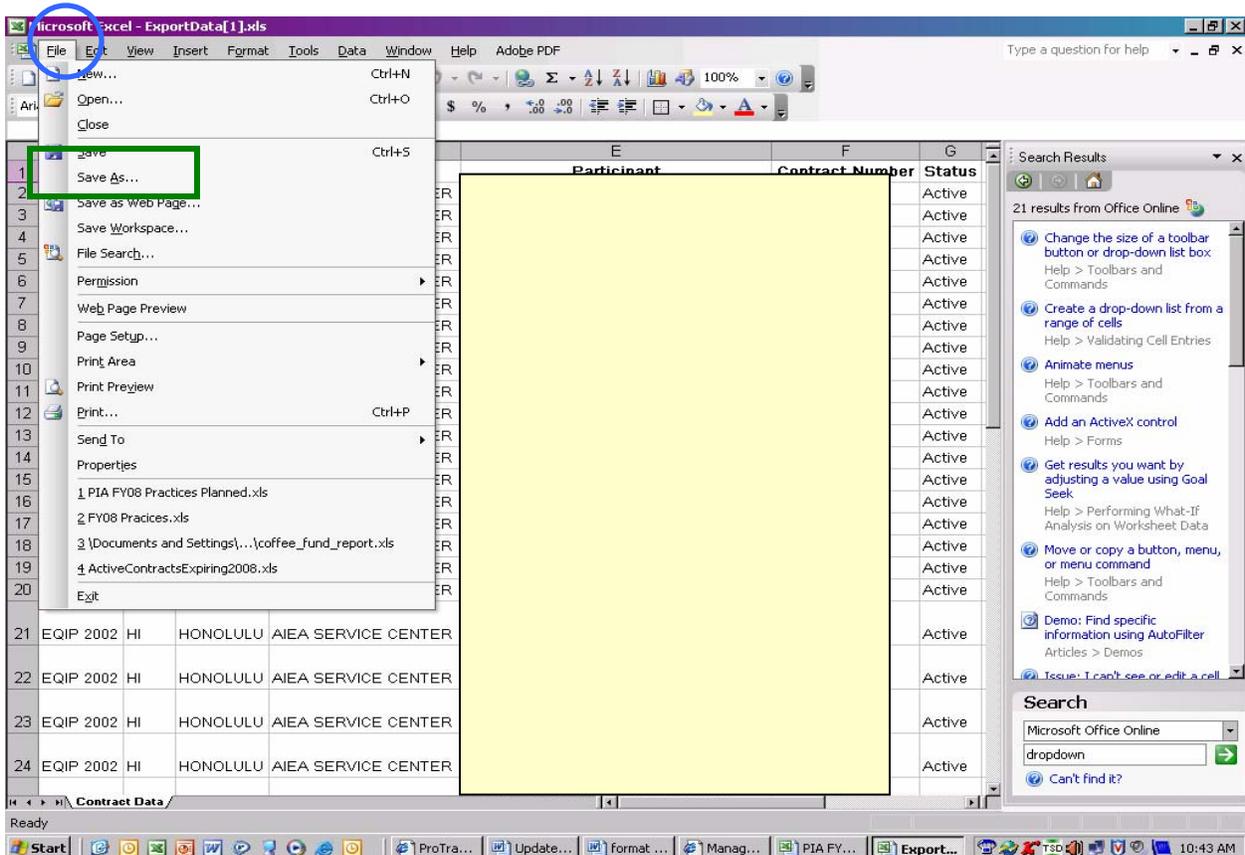
6. Update Eligibility Elements In An Active Contract

15. Click **Open**



16. **IMMEDIATELY** click **File/Save AS**

- Rename and save in appropriate folder. Be sure to save with **.xls** extension
- Adjust columns and rows as necessary. Include the date the report was created



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17. Go back to ProTracts

18. Double click on the first contract to open it

Manage Contracts - Programs

Find Contracts: Name & Contract Number | Programs | Practices | Pending Actions | Maintenance | Clear Selections | Search

Program: All Programs | Fiscal Year: All | State: HI | Counties | Field Offices | Locations | GO

Fund Code: No Fund Code Available

Contracts Status: All, Active, Completed, Cancelled, Terminated

Contract Amount: \$150,000.00 and greater

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19. Click on **Participant Info**

Conservation Contract

Participant Info | Approve Modification | History | Print | Modify

Program: EQIP 2002 | Total Estimated Cost Share: \$3,675 | Contract Number: [] | Contract Status: Active | Status Date: 12/22/2006

Participants: [] | FSA Contract #: [] | Start Date: 3/20/2007 | Expires: 9/30/2009

Location: HONOLULU, HI AIEA SERVICE CENTER | Current Contract Year: First Year | Modification Number: 0 | Modification Date: N/A

Cost List: HI-HonoluluEQIP 200207-02 - Limited Resource 07 EQIP PIA East Cost List | FA Fund Code: Aiea Field Office FA | Planner: Michael O Whitt

Treated Acres: 1 | Land Units: [] | Predominant Crop Type: Other Crop

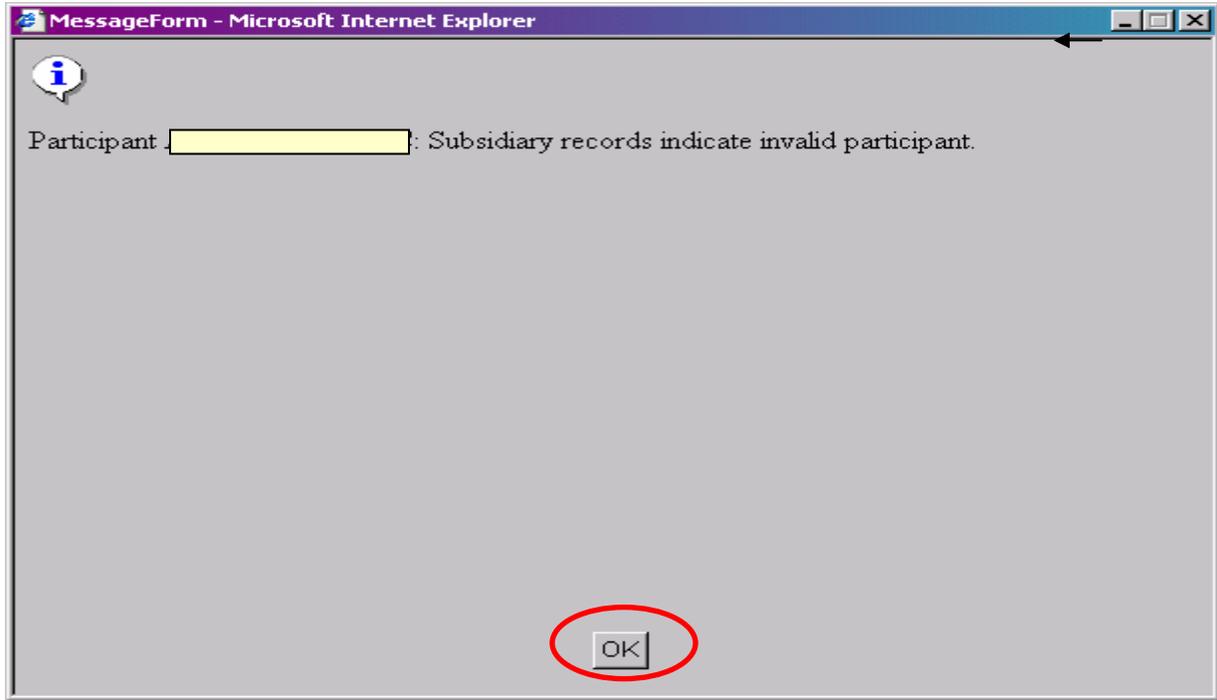
Conservation Plan: 2007 EQIP | Owner: Free

Resource Concern: No Livestock, LiveStock Related: Soil Erosion: Road, Road Sides and Construction Sites, Soil Erosion: Sheet and Rill

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20. A message box will appear if there is a problem with eligibility. The message below is one example.

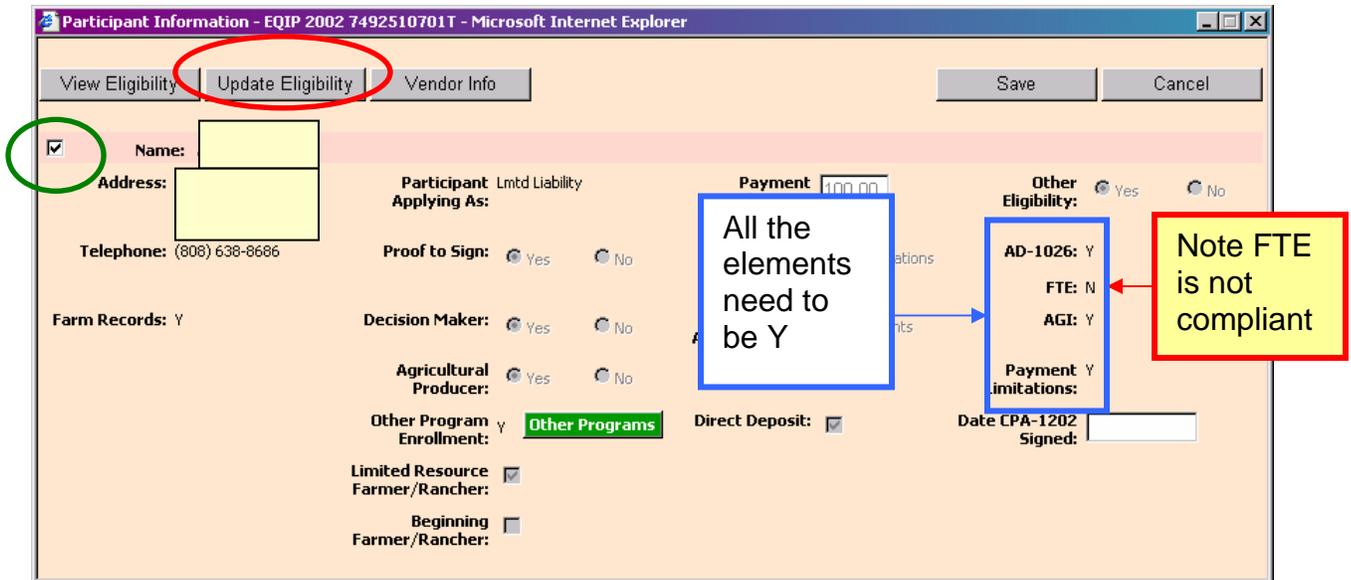
21. Click **OK**



22. Click on **box** next to participant name

23. Click on **Update Eligibility** button

24. Wait for data to be retrieved



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- 25. **FTE** eligibility element is now updated after FSA made adjustments
- 26. **But** please note that **after** the update **Payment Limitations** is now **incompliant**
- 27. You **must** contact FSA to resolve this new problem before you can certify a practice.
- 28. Click **Save**
- 29. Repeat the process on all the contracts, checking for eligibility problems

The screenshot shows a web browser window with the title "Participant Information - EQIP 2002 7492510701T - Microsoft Internet Explorer". The page has three tabs: "View Eligibility", "Update Eligibility", and "Vendor Info". The "Save" button is circled in red. The form contains the following fields and options:

- Name: [Redacted]
- Address: [Redacted]
- Telephone: (808) 638-8686
- Farm Records: Y
- Participant Applying As: Lmt'd Liability
- Payment Share %: 100.00
- Other Eligibility: Yes No
- Proof to Sign: Yes No
- Signature Required for: Modifications
- AD-1025: Y
- FTE: Y (circled in green)
- AGI: Y
- Decision Maker: Yes No
- Signature Acceptable for: Payments
- Agricultural Producer: Yes No
- Vendor Code:
- Payment Limitations: N (circled in pink)
- Other Program Enrollment: Y **Other Programs**
- Direct Deposit:
- Date of Birth: 12/02
- Limited Resource Farmer/Rancher:
- Beginning Farmer/Rancher:
- Signed: [Redacted]