

How Entity Members with Signature Authority Request Initial Full Authority Access Assignment in Conservation Client Gateway

A member of a business entity with signature authority will login as an individual. They cannot see or act upon their business records in Conservation Client Gateway until their authority for the business entity is assigned in Conservation Client Gateway by NRCS. At initial login, their authority for the business will be "Not Assigned". The authority assignment can be accomplished in Conservation Client Gateway by following the steps below to submit a Request for Full Authority Access online. Or, they can visit the NRCS office in-person where the employee can create and process a Full Authority Access request. Once the member has their Full Authority Access assigned in Conservation Client Gateway, they can assign Limited Authority Access to other non-signatory members.

After login to Conservation Client Gateway, the signature authority member will do the following:

Step 1:

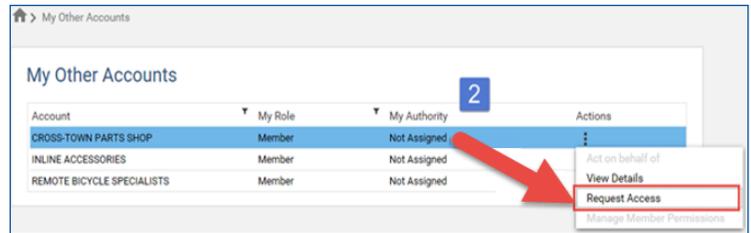
Go to the Avatar icon next to their name and select "My Other Accounts" from the menu. They will be taken to the "My Other Accounts" page.



Step 2:

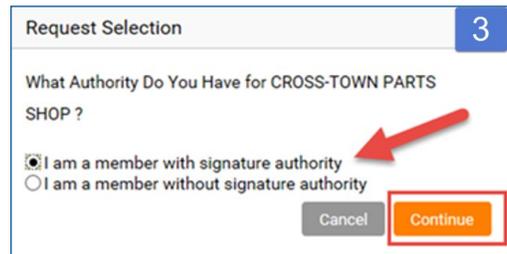
Their authority at initial login for their business or organization will be "Not Assigned".

From the desired business or organization, Select "Request Access" from the "Actions" menu options.



Step 3:

On the Request Selection form, choose "I am a Member with signature authority". Click "Continue".

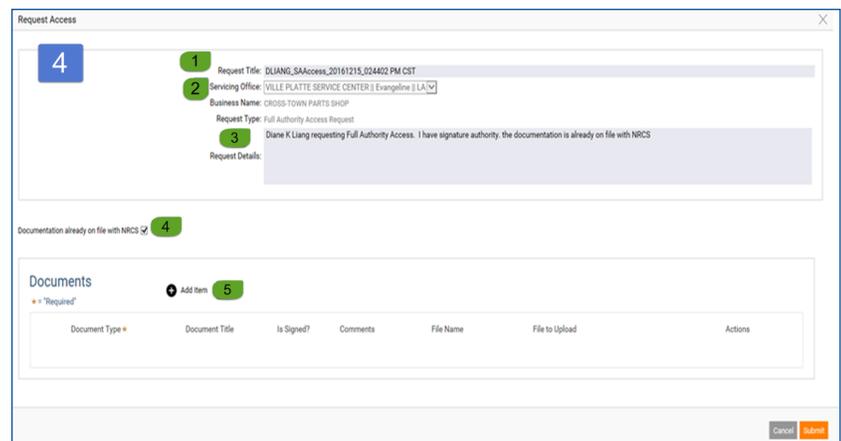


Step 4:

Complete the Request Access form:

1. Change the default name of the request (optional)
2. Select the Service Center Office as applicable. If the client works with more than one Service Center Office, they will have the option to select the office they want to send the request to.
3. Enter comments to the NRCS employee in the request detail notes field.
4. Check the box to indicate all current and appropriate documentation regarding the signature authority is currently on file with NRCS.
5. Upload copies of current documentation regarding signature authority (optional if not already on file).

Submit the request. A confirmation success message will display.



An notification email will be sent to the client and to the NRCS designated Point of Contact at the Service Center Office.



How Entity Members with Signature Authority Request Initial Full Authority Access Assignment in Conservation Client Gateway—Continued

Where to find the submitted Full Authority Access Request

Step 1:

Click on the “**Manage Account and View All Requests**” quick access icon on the Home Page.



Step 2: Go to the “**Access Requests**” tab. All requests for Full Authority to a business entity and Power of Attorney requests will display on this page. The request will be listed on the page in a grid view. The status will be **Pending – Review** until NRCS has activated the request. There are two options to view the details of the request:

1. Click the **Request Name**
2. Use the **Actions** menu

Note: The status will be updated to “Resolved—Activated” once the NRCS employee activates the request.

Request ID	Request Name	Request Type	Date	Request Status	Actions
6571	DLIANG_SAAccess_20161215_024402 PM CST	Full Authority Access Request	12/15/2016 02:44:02 CST	Pending Review	⋮

NRCS will process the Full Authority Access Request

Upon completion, an notification email will be sent to the client and to the NRCS designated Point of Contact at the Service Center Office.



FULL AUTHORITY ACCESS IS GRANTED

The client can login to view the business records by doing the following:

Step 1: Select “**My Other Accounts**” from the menu. They will be taken to the “**My Other Accounts**” page.



Step 2:

1. From the desired business, select “**Act on Behalf of**” from the “**Actions**” menu. Confirm intent to Act on behalf of the selected business.
2. The page will display “**Acting on Behalf of [Business Name]**”. They now have access to the business records. They can sign documents, view information and submit requests on behalf of the business.

Account	My Role	My Authority	Actions
CROSSTOWN PARTS SHOP	Member	Full Authority	⋮
INLINE ACCESSORIES	Member	Not Assigned	⋮
REMOTE BICYCLE SPECIALISTS	Member	Not Assigned	⋮

Client is now viewing the records and information for the business

Once Full Authority is Assigned the client may also do the following from “**My Accounts**”:

1. Select the “**View Details**” option, to view all members of the business and their authority.
2. Select the “**Manage Member Permissions**” to grant and revoke Limited Authority for members with non-signature authority.