

# **Toolkit and ProTracts for CSP 2006**

**Guidance for the Set Up of  
Toolkit and ProTracts for the  
Conservation Security Program**

**Natural Resources Conservation Service  
Program Field Office Business Tools Team  
February 2006**

# Customer Service Toolkit and ProTracts for CSP 2006

February 2006

## Table of Contents

<b>I. Conservation Activities and Narratives for CSP</b> .....	<b>3</b>
<b>II. Toolkit 2004 Setup for CSP</b> .....	<b>4</b>
A. Program List .....	4
B. Practice List.....	4
C. CSP Cost List Spreadsheet.....	5
<b>III. CSP Cost Lists</b> .....	<b>5</b>
A. Stewardship Payment Components.....	5
B. Unit Cost Calculation Instructions for Stewardship Payment Components.....	6
C. Existing Practice Payment Components.....	7
D. Unit Cost Calculation Instructions for Existing Practice Payment Components.....	8
E. Enhancement Payment Components.....	10
F. New Practice Components.....	10
<b>IV. ProTracts Setup for CSP</b> .....	<b>11</b>
A. CSP Roles and Service Area Permissions.....	11
B. CSP Delegation of Authority.....	11
C. Conservation Practice Update Activities.....	12
D. Upload the CSP Cost List to ProTracts.....	12
E. Set Up a CSP FA Sub-account.....	12
<b>V. CSP Plan and Contract Development Guidance</b> .....	<b>13</b>
A. Payment Limits Calculations.....	13
B. CSP Plans and Contracts.....	13
C. Stewardship Payment Contract Items.....	14
D. Existing Practice Payment Contract Items.....	14
E. Enhancement Payment Contract Items.....	14
F. New Practices.....	14

## I. CONSERVATION ACTIVITIES AND NARRATIVES FOR CSP

CSP conservation activities are treated similar to NHCP practices in Toolkit and ProTracts. Several new codes were created for these activities and are listed in the table below.

The activity codes and national narratives are downloaded automatically to Toolkit 2004. The activity codes are recognized by the ProTracts rule checker to determine payment limits and calculate annual payments.

The Conservation Practice Standards web application now provides all the features to enter state and local narratives. New activity codes such as EPL must be activated in CPS first by a state data steward and then field users refresh the domain data in Toolkit to access the new code(s).

**CSP Activity Codes, Units, and National Narratives**

Code	CSP Activity Name	Units	National Narrative
ESM	Enhancement – Soil Management	Ac.	Practices and measures such as conservation tillage and conservation cover crops applied to enhance soil quality and management activities.
ENM	Enhancement – Nutrient Management	Ac.	Practices and measures such as soil testing, split nitrogen application, and precision farming applied to enhance nutrient management activities.
EPM	Enhancement – Pest Management	Ac.	Practices and measures such as pest scouting and integrated pest management applied to enhance pest management activities.
EWM	Enhancement – Water Management	Ac.	Practices and measures such as improving the efficiency of irrigation systems applied to enhance water management activities.
EGM	Enhancement – Grazing Management	Ac.	Practices and measures such as use of NUTBAL and GSAT to develop a prescribed grazing system or interseeding legumes into established grasses to enhance grazing management activities.
EHM	Enhancement – Habitat Management	Ac.	Practices and measures such as conducting prescribed burns in a mosaic pattern and establishing wildlife food plots to enhance wildlife habitat development or maintenance activities.
EAM	Enhancement – Air Resource Management	Ac.	Practices and measures such as cross wind trap strips and odor control efforts to enhance air resource management activities.
EEM	Enhancement – Energy Management	Ac.	Practices and measures such as use of renewable energy fuels (soy biodiesel, ethanol) and energy audits of agricultural operations to enhance energy management activities.
EPL	Enhancement – Plant Management	Ac.	Practices and activities such as establishing or maintaining native, culturally significant plants in field borders, vegetative barriers and herbaceous buffers to improve plant health and vigor, and to enhance plant management activities.
EDR	Enhancement - Drainage	Ac.	Practices and measures applied to improve drainage.
ESL	Enhancement – Salinity	Ac.	Practices and measures applied to reduce salinity.
SP	Stewardship Payment	Ac.	Annual stewardship payment based on the degree of resource treatment or tier level of treatment.
EPP	Existing Practice Payment	Ac.	Annual existing practice payment. Existing practices must be maintained for the life of the contract (list the existing practices to be maintained in the additional narrative).

# Customer Service Toolkit and ProTracts for CSP 2006

February 2006

## II. TOOLKIT 2004 SETUP FOR CSP

Use the Toolkit 2004 Practice Schedule and Plan Wizard to develop CSP stewardship plans. Use the Toolkit 2004 Contract Wizard to develop certain contract items for CSP, specifically the enhancements and new practices.

- Field offices must use the Practice Scheduler and Toolkit Plan Wizard to develop stewardship plan documents. The plan should indicate recurring practices for all contract years when signed by applicant.
- Field offices must use the Toolkit 2004 Contract Wizard to develop CSP contract items. The contract items can be accessed from ProTracts after the customer folder is checked into the National Conservation Planning database.
- Field offices are advised **NOT** to use the Contract Support Document AD-1155 produced by Toolkit because the contract wizard does not calculate CSP payment limitations.

### A. Program List

To use Toolkit for CSP practices and activities, the CSP option must be available from the Program list in the Practice Schedule.

#### Instructions

1. Open the Toolkit Preferences module.
2. Click on the Choice List tab.
3. Click the check box for CSP if not already checked.
4. Click Save. The next time the Practice Schedule is opened, CSP will appear in the Program list in the Schedule grid.

### B. Practice List

Field offices are advised **NOT** to include the Stewardship Payment (SP) and Existing Practice Payment (EPP) in the schedule. These are annual payments that ProTracts calculates automatically and are not needed in the stewardship plan. These instructions show how to turn off the display of the SP and EPP in the Toolkit practice list.

#### Instructions

1. Open Toolkit Preferences.
2. Click on the Practice Narratives tab.
3. If the SP and EPP codes are checked, click on the check box to remove the check.
4. Turn on all enhancements beginning with letter E as shown on page 1.
5. Click Save. The next time the Practice Schedule window is opened, the SP and EPP practices will not appear in the Practice list.

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### C. CSP Cost List Spreadsheet

Follow the instructions in Section III, CSP Cost Lists, to develop a cost list spreadsheet for use with the Toolkit 2004 Contract Wizard. All CSP cost lists must be approved by the Financial Assistance Program Division Director. Save the CSP cost list in these folders:

C:\Field\_Office\_Tech\_Guide\Section\_I and optionally in F:\FOTG\Section\_I

### III. CSP COST LISTS

Follow the guidance in this section to customize the CSP cost list template for each watershed.

#### A. Stewardship Payment Components

ProTracts automatically calculates the Stewardship Payment (SP) for each contract year based on the unit costs entered in the CSP cost list for the watershed. An adjusted per acre rate for each land use must be calculated for each tier and entered in the cost list Unit\_Cost column of the template (shaded blue column in example below).

All SP components are flat rate (FR) and 100% cost share. If a land use component in the template does not apply to the watershed, delete it from the cost list template.

**Note specific to 2006:** Add the new land uses for Irrigated Pastured Cropland and Pastured Cropland with the rates that correspond respectively to the approved Irrigated Cropland rate and Cropland rate. ProTracts does not have a land use category for grazing land—only for pasture and range so the cost list should not include grazing.

**Do not change the code, component name, unit type, cost type, or share rate for stewardship payment components.**

#### Example 1: Cost List Format for Stewardship Payment Components

Practice_Code	Cost_Share_Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate
SP	CSP	Stewardship Payment	Tier 3 Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 2 Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 1 Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 3 Irrigated Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 2 Irrigated Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 1 Irrigated Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 3 Irrigated Pastured Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 2 Irrigated Pastured Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 1 Irrigated Pastured Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 3 Pastured Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 2 Pastured Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 1 Pastured Cropland	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 3 Pasture	Ac.		FR	100

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

Practice Code	Cost_Share Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate
SP	CSP	Stewardship Payment	Tier 2 Pasture	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 1 Pasture	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 3 Range	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 2 Range	Ac.		FR	100
SP	CSP	Stewardship Payment	Tier 1 Range	Ac.		FR	100

### B. Unit Cost Calculation Instructions for Stewardship Payment Components

#### Instructions

- Calculate the adjusted rate for the stewardship payment for each tier:
  - Tier 3 Cropland Unit Cost = Watershed Cropland Rate \* .75 \* .15
  - Tier 2 Cropland Unit Cost = Watershed Cropland Rate \* .50 \* .10
  - Tier 1 Cropland Unit Cost = Watershed Cropland Rate \* .25 \* .05
- Enter the adjusted cropland rate for each tier for practice SP in the cost list column Unit\_Cost.
- Repeat 1 and 2 for each eligible land use in the watershed.

#### Example 2: Hondo Unit Cost Calculation for Stewardship Payments

Tier	Land Use	Rate	Tier Reduction	Tier %	Unit Cost	Units
3	Cropland	\$16	.75	.15	\$1.80	Ac.
2	Cropland	\$16	.50	.10	\$0.80	Ac.
1	Cropland	\$16	.25	.05	\$0.20	Ac.
3	Irrigated Cropland	\$42	.75	.15	\$4.73	Ac.
2	Irrigated Cropland	\$42	.50	.10	\$2.10	Ac.
1	Irrigated Cropland	\$42	.25	.05	\$0.53	Ac.
3	Pastured Cropland	\$16	.75	.15	\$1.80	Ac.
2	Pastured Cropland	\$16	.50	.10	\$0.80	Ac.
1	Pastured Cropland	\$16	.25	.05	\$0.20	Ac.
3	Irrigated Pastured Cropland	\$42	.75	.15	\$4.73	Ac.
2	Irrigated Pastured Cropland	\$42	.50	.10	\$2.10	Ac.
1	Irrigated Pastured Cropland	\$42	.25	.05	\$0.53	Ac.
3	Pasture	\$6	.75	.15	\$0.68	Ac.
2	Pasture	\$6	.50	.10	\$0.30	Ac.
1	Pasture	\$6	.25	.05	\$0.08	Ac.
3	Range	\$6	.75	.15	\$0.68	Ac.
2	Range	\$6	.50	.10	\$0.30	Ac.
1	Range	\$6	.25	.05	\$0.08	Ac.

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### Example 3: Hondo Stewardship Payment Cost List Components

Practice_Code	Cost_Share_Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate
SP	CSP	Stewardship Payment	Tier 3 Cropland	Ac.	1.80	FR	100
SP	CSP	Stewardship Payment	Tier 2 Cropland	Ac.	.80	FR	100
SP	CSP	Stewardship Payment	Tier 1 Cropland	Ac.	.20	FR	100
SP	CSP	Stewardship Payment	Tier 3 Irrigated Cropland	Ac.	4.73	FR	100
SP	CSP	Stewardship Payment	Tier 2 Irrigated Cropland	Ac.	2.10	FR	100
SP	CSP	Stewardship Payment	Tier 1 Irrigated Cropland	Ac.	.53	FR	100
SP	CSP	Stewardship Payment	Tier 3 Pastured Cropland	Ac.	1.80	FR	100
SP	CSP	Stewardship Payment	Tier 2 Pastured Cropland	Ac.	.80	FR	100
SP	CSP	Stewardship Payment	Tier 1 Pastured Cropland	Ac.	.20	FR	100
SP	CSP	Stewardship Payment	Tier 3 Irrigated Pastured Cropland	Ac.	4.73	FR	100
SP	CSP	Stewardship Payment	Tier 2 Irrigated Pastured Cropland	Ac.	2.10	FR	100
SP	CSP	Stewardship Payment	Tier 1 Irrigated Pastured Cropland	Ac.	.53	FR	100
SP	CSP	Stewardship Payment	Tier 3 Pasture	Ac.	.68	FR	100
SP	CSP	Stewardship Payment	Tier 2 Pasture	Ac.	.30	FR	100
SP	CSP	Stewardship Payment	Tier 1 Pasture	Ac.	.08	FR	100
SP	CSP	Stewardship Payment	Tier 3 Range	Ac.	.68	FR	100
SP	CSP	Stewardship Payment	Tier 2 Range	Ac.	.30	FR	100
SP	CSP	Stewardship Payment	Tier 1 Range	Ac.	.08	FR	100

### C. Existing Practice Payment Components

ProTracts automatically calculates the Existing Practice Payment (EPP) for each contract year based on the unit costs entered in the CSP cost list for a watershed. An adjusted per acre rate for each land use must be calculated for each tier and entered in the cost list Unit\_Cost column of the template (shaded blue column in example below).

All EPP components are flat rate (FR) and 100% cost share. If a land use component in the template does not apply to the watershed, delete it from the cost list template.

**Do not change the practice code, component name, unit type, cost type, or share rate for existing practice payment components.**

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### Example 4: Cost List Format for Existing Practice Payment Components

Practice_Code	Cost_Share_Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate
EPP	CSP	Existing Practice Payment	Tier 3 Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Irrigated Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Irrigated Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Irrigated Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Pastured Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Pastured Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Pastured Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Irrigated Pastured Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Irrigated Pastured Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Irrigated Pastured Cropland	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Pasture	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Pasture	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Pasture	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Range	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Range	Ac.		FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Range	Ac.		FR	100

### D. Unit Cost Calculation Instructions for Existing Practice Payment Components

#### Instructions

1. Calculate the existing practice payment unit cost for cropland for each of the tiers:

$$\text{Tier 3 Cropland Unit Cost} = \text{Cropland Rate} * .75 * .15 * .25$$

$$\text{Tier 2 Cropland Unit Cost} = \text{Cropland Rate} * .50 * .10 * .25$$

$$\text{Tier 1 Cropland Unit Cost} = \text{Cropland Rate} * .25 * .05 * .25$$

**NOTE:** Unit cost can also be calculated by multiplying the Stewardship Payment unit cost for cropland by 25%.

2. Enter the cropland unit cost for each tier for practice EPP in the cost list column Unit\_Cost.
3. Repeat 1 and 2 for each eligible land use in the watershed.

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### Example 5: Hondo Unit Cost Calculation for Existing Practice Payments

Tier	Land Use	Rate	Tier Reduction	Tier %	25% of Stewardship Payment	Unit Cost	Units
3	Cropland	\$16	.75	.15	.25	\$0.45	Ac.
2	Cropland	\$16	.50	.10	.25	\$0.20	Ac.
1	Cropland	\$16	.25	.05	.25	\$0.05	Ac.
3	Irrigated Cropland	\$42	.75	.15	.25	\$1.18	Ac.
2	Irrigated Cropland	\$42	.50	.10	.25	\$0.53	Ac.
1	Irrigated Cropland	\$42	.25	.05	.25	\$0.13	Ac.
3	Pastured Cropland	\$16	.75	.15	.25	\$0.45	Ac.
2	Pastured Cropland	\$16	.50	.10	.25	\$0.20	Ac.
1	Pastured Cropland	\$16	.25	.05	.25	\$0.05	Ac.
3	Irrigated Pastured Cropland	\$42	.75	.15	.25	\$1.18	Ac.
2	Irrigated Pastured Cropland	\$42	.50	.10	.25	\$0.53	Ac.
1	Irrigated Pastured Cropland	\$42	.25	.05	.25	\$0.13	Ac.
3	Pasture	\$6	.75	.15	.25	\$0.17	Ac.
2	Pasture	\$6	.50	.10	.25	\$0.08	Ac.
1	Pasture	\$6	.25	.05	.25	\$0.02	Ac.
3	Range	\$6	.75	.15	.25	\$0.17	Ac.
2	Range	\$6	.50	.10	.25	\$0.08	Ac.
1	Range	\$6	.25	.05	.25	\$0.02	Ac.

### Example 6: Hondo Existing Practice Payment Cost List Components

Practice_Code	Cost_Share_Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate
EPP	CSP	Existing Practice Payment	Tier 3 Cropland	Ac.	.45	FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Cropland	Ac.	.20	FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Cropland	Ac.	.05	FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Irrigated Cropland	Ac.	1.18	FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Irrigated Cropland	Ac.	.53	FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Irrigated Cropland	Ac.	.13	FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Pastured Cropland	Ac.	.45	FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Pastured Cropland	Ac.	.20	FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Pastured Cropland	Ac.	.05	FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Irrigated Pastured Cropland	Ac.	1.18	FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Irrigated Pastured Cropland	Ac.	.53	FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Irrigated Pastured Cropland	Ac.	.13	FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Pasture	Ac.	.17	FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Pasture	Ac.	.08	FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Pasture	Ac.	.02	FR	100
EPP	CSP	Existing Practice Payment	Tier 3 Range	Ac.	.17	FR	100
EPP	CSP	Existing Practice Payment	Tier 2 Range	Ac.	.08	FR	100
EPP	CSP	Existing Practice Payment	Tier 1 Range	Ac.	.02	FR	100

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### E. Enhancement Payment Components

Enhancement components are similar to practice components in Toolkit and ProTracts cost lists. The table below shows one enhancement component for each type of enhancement category. Enhancement components need to remain concise to avoid truncation of the text in Toolkit and ProTracts.

1. The CSP template cost list includes the eligible enhancement categories for FY 2006.

**Do not change or invent new enhancement categories.**

#### Example 7: Cost List Format for Enhancement Payment Components

Practice_Code	Cost_Share_Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate
ESM	CSP	Enhancement - Soil Management	Soil Quality Improvements Level 1 - 0.1	Ac.	1.16	FR	100
ENM	CSP	Enhancement - Nutrient Management	Monitoring by collecting yield data	Ac.	3	FR	100
EPM	CSP	Enhancement - Pest Management	Integrated Pest Management	Ac.	8	FR	100
EWM	CSP	Enhancement - Water Management		Ac.	10	FR	100
EGM	CSP	Enhancement - Grazing Management		Ac.	1	FR	100
EHM	CSP	Enhancement - Habitat Management		Ac.	10	FR	100
EAM	CSP	Enhancement - Air Quality Management		Ac.	25	FR	100
EEM	CSP	Enhancement - Energy Management	Energy audit	Ea.	1,000	FR	100
ESL	CSP	Enhancement - Salinity Management				FR	100
EDR	CSP	Enhancement - Drainage Management				FR	100

#### Instructions

1. Enter the approved enhancements for the watershed in the appropriate category.
2. Enter the units of the enhancement.
3. Enter the unit cost.
4. Enter cost type as FR (flat rate).
5. Enter share rate as 100.
6. Delete an enhancement category from the template if it is not offered in the watershed.

### F. New Practice Components

#### Instructions

1. Enter one or more component names, units, and unit cost for each of the new practices that were approved for the watershed into the template.
2. Enter AC Cost Type for each component.
3. Enter 50% Share Rate.
4. Copy the components and change the share rate (up to 65%) for Limited Resource Producer/Beginning Farmer and Rancher (see example below).

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### Example 8: Sample CSP Practices

Practice_Code	Practice_Name	Component	Unit	Unit_Cost	Cost_Type	Share_Rate
382	Fence	Add local components			AC	50
382	Fence	Add local components			AC	65
391	Riparian Forest Buffer	Add local components			AC	50
391	Riparian Forest Buffer	Add local components			AC	65
393	Filter Strip	Add local components			AC	50
393	Filter Strip	Add local components			AC	65
614	Watering Facility	Add local components			AC	50
614	Watering Facility	Add local components			AC	65

## IV. PROTRACTS SETUP FOR CSP

ProTracts will allow entry of 2006 CSP applications the week that the 2006 signup period begins. Steps A through D below may be completed before the signup begins.

### A. CSP Roles and Service Area Permissions

Everyone who will use ProTracts for CSP must be assigned a CSP role. If staff will be detailed to a watershed from other NRCS offices, their service area permissions must include the counties and servicing offices in the watershed. State Program Managers will require adjacent state permissions for approved watersheds that cross state boundaries.

#### Instructions\*

1. For field users, select Field User Permissions from the Tools menu. For state office users, select State Office User Permissions. For conservation district employees, select Affiliate Field User Permissions.
2. Select an office from the list and then select a name.
3. Add offices and counties as needed to the person's service area, with special attention to watersheds that cross county and state boundaries.
4. Click on the appropriate role in the CSP box in the User's Program Permissions area in the lower part of the screen.

### B. CSP Delegation of Authority

Set the ProTracts permissions for the delegation of authority within the watershed.

#### Instructions\*

1. Select Manage Permissions from the Tools menu.
2. Select a role from the list, for example Designated Conservationist, and then select CSP.
3. Click the check boxes for the permissions that are appropriate for the role.
4. Save and repeat steps 2 and 3 for other roles.

---

\* ProTracts Help provides detailed instructions.

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### C. Conservation Practice Update Activities

1. State CPS Data Stewards must activate all CSP Activities Codes (enhancements) prior to uploading CSP contracts to ProTracts or creation of Toolkit plans. Note that Enhancement Plant Management (EPL) is a new activity for 2006.
2. Access point to CPS is <https://cps.sc.egov.usda.gov/cps/Default.aspx> or the field tools page of my.nrcs. Steps to activate are the following menus: Practices: State Practice List: Show Unchecked: and check the box in front of the all the CSP Activity Codes (prefaced with E). Save.
3. State narratives or local narratives are also added and saved in the CPS application.
4. Toolkit users will need to use the File: Reload Domain Data menu choice and follow the on screen instructions to have their domain data refreshed to access the new codes.

### D. Upload the CSP Cost List to ProTracts

The same CSP cost list will be used for an entire watershed.

#### Instructions\*

1. Upload the CSP cost list for each county in the watershed.
2. If the watershed crosses a state boundary, upload the CSP cost list for each of the counties in the other state that are in the watershed.

### E. Set Up a CSP FA Subaccount for 2006 Watersheds

ProTracts will have a \$0.00 allocation for CSP FA for each state.

**NOTE:** CSP FY06 FA allocations will be entered into ProTracts after the determination is made as to the number of categories and subcategories that can be funded. The state's allocation will be the total FY06 cost for the funded contracts located in the state.

#### Instructions\*

1. Select Allocate from the Funds menu.
2. Select CSP and 2006.
3. Click on the CSP FA account and then select Add Subaccount from the blue menu bar.
4. Enter the subaccount name in this format (see Example 9):  

<8-digit hydrologic unit code> <watershed name>
5. Click on Select Locations and select the counties in the watershed.
6. Click Save Draft and then click Release Funds to give field offices access to the fund code.
7. If the watershed crosses a state boundary, the program manager in the respective state should set up the subaccounts.

---

\* ProTracts Help provides detailed instructions.

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

### Example 9 : CSP Subaccount for the Hondo Watershed

Allocate State Funds					
Program Funds					
Add Sub Account		Delete Sub Account		Add Other Locations	
Select Locations		Release Funds		Export   Save Draft	
Program: CSP	Fiscal Year: 2005	State: TX	State Distribution: \$105,426.00	National Accounts: 2	
Account	Amount	Fund Code	Balance	Status	
1 CSP FA	\$91,675.00	85F 48	\$0.00	Released	
12110107 Hondo	\$67,277.00	85F 48 01	\$0.00	Released	
11090102 Punta de Agua	\$24,398.00	85F 48 02	\$0.00	Released	
2 CSP TA	\$13,751.00	85T 48	\$13,751.00	Draft	
Account	Amount	Fund Code	Balance	Status	
12110107 Hondo	\$67,277.00	85F 48 01	\$0.00	Released	
Allocated: \$67,277.00		Balance: \$0.00			
Location	Amount	Location	Amount	Location	Amount
BANDERA	\$21,090.00	MEDINA	\$46,187.00	UVALDE	\$0.00
FRIO	\$0.00				

## V. CSP PLAN AND CONTRACT DEVELOPMENT GUIDANCE

### A. Payment Limitation Calculations

The Toolkit Contract Wizard knows nothing about program rules. Consequently, the Wizard cannot calculate CSP payment limitations and the limitations cannot be shown on the AD-1155 produced by Toolkit. However, the Wizard can be used to develop contract items that are uploaded to ProTracts. Follow the tips for efficient data entry listed in Section C below.

The ProTracts Rule Checker calculates CSP payment limitations for annual stewardship, existing practice and enhancement payments. It also checks for the maximum annual contract cost by tier, and checks that new practice payments do not exceed \$10,000. The rule checker applies the variable payment rate approved for the signup period. The Rule Checker automatically caps annual payments at the payment limits. The capped cost is printed on the CCC-1200 and the AD-1155. Capped items have a footnote indicating that the payment was capped at the limitation. Payments for capped items are limited to the cap. Capped payments are noted on the payment form.

### B. CSP Plans and Contracts

1. Aggregate land units by land use, common management, or SCI. The guidance is to plan by practice and contract by components.
2. Create **generalized** narratives rather than detailed narratives in the Conservation Practice Standards application. For example, a standard narrative for each SCI level is not needed for Enhancement - Soil Management (ESM). Specific SCI levels can be included in the custom narrative in the participant's stewardship plan through Toolkit.
  - Detailed standard narratives will cause the field to schedule many versions of the same practice and will result in more contract items than are needed.
3. Plan enhancements, new practices, and non cost-shared practices on the aggregated land units.
  - Do **not** plan a Stewardship or Existing Practice Payment in Toolkit because ProTracts automatically generates contract items for these payments.
  - Use the Plan Wizard to develop a stewardship plan.
4. Use the Toolkit Contract Wizard to develop contract items for new practices, benchmark enhancements, and new enhancements.
  - Do **not** develop contract items for non cost-shared practices.

## Customer Service Toolkit and ProTracts for CSP 2006

February 2006

- Do not produce an AD-1155 from the Toolkit Contract Wizard because the contract wizard does not calculate payment limitations and so the correct payment amounts will not be displayed on the AD-1155.
- In ProTracts, open the CSP application, select the customer and contract to be uploaded from the National Conservation Planning database.
- Contract must include all present and future planned cost shared activities. The Copy Item function can be used to copy benchmark enhancements for the contract out years. If using this option in ProTracts return to Toolkit after data upload and use the recurring practice option (R) to indicate the out years in the Stewardship Plan.
- Print the CCC-1200 and AD-1155 from ProTracts.

### C. Stewardship Payment Contract Items

CSP contracts will have one stewardship payment for each year of the contract. ProTracts will generate these contract items automatically after the tier, land use acres, and dominant land use is entered.

Field users have the option to enter the starting contract item number (CIN) for the stewardship payments.

### D. Existing Practice Payment Contract Items

CSP contracts will have one existing practice payment for each year of the contract. ProTracts will generate these contract items automatically from the stewardship payment items. The existing practice payment is paired with the stewardship payment. For example, if the starting CIN the stewardship payment is 1, the existing practice payment will be CIN 2.

### E. Enhancement Contract Items

Contract items for benchmark and new enhancement are entered in Toolkit and uploaded to ProTracts in the same way that new practices are entered for either EQIP or WHIP. An enhancement category is selected from the practice list, and the activities are selected from the cost list. When the component amount is entered, the cost share is calculated automatically.

The ProTracts Rule Checker will check that the total enhancement payment does not exceed the annual limit.

### F. New Practices

Contract items for new practices are entered in Toolkit and uploaded to ProTracts in the same way that new practices are entered for EQIP or WHIP. A practice is selected from the practice list, and the components are selected from the cost list. When a component amount is entered, the cost share is calculated automatically.

CSP annual payments are generated early in the fiscal year states for items that are already implemented. So proceed with caution with scheduling new practices in the first year of the contract.

The ProTracts Rule Checker will check that new practice payments do not exceed \$10,000 for the life of the contract.