

## XI. Additional Functions

### A. Cooperator SAMII Status

**Things to Know:**

- The “Cooperator SAMII Status” section of the “Home” screen provides information about the cooperator’s status.
- Three symbols exist in this grid: green check mark, yellow triangle, and red minus.
- Under the “SAMII Vendor” column, the symbols denote the following:
  - *Green Check Mark:* The Vendor form has been processed by the Office of Administration.
  - *Yellow Triangle:* The contract has been board approved and the Office of Administration (OA) has processed the “Vendor Form,” but the user is not able to choose the valid vendor in the “SAM II Multi-Vendor Selection” grid. The record is locked down within MoSWIMS. The user can only resolve this during a “Change Order” or “Contract Payment.” When the valid vendor has been chosen, the symbol changes to green.
  - *Red Minus:* The paperwork has not been processed, or OA had issues when they received it. Re-fax the forms to resolve the issue. If the symbol persists, contact OA. (Ensure all paperwork also contains the district phone number and a contact name so OA has a contact to correct issues on the forms.)
- Under the “SAMII EFT” column, they denote the following:
  - *Green Check Mark:* The ACH/EFT forms have been processed by OA and pre-note (a 10 business day process of testing the bank transaction) has been completed.
  - *Yellow Triangle:* The pre-note process is taking place (10 business days of processes that test the bank transaction). If the symbol does not progress to a green symbol within ten business days, contact OA. This means OA had an issue with the bank account information given.
  - *Red Minus:* OA has not yet processed the forms. The district should re-fax the forms, and if the symbol persists, contact OA (be sure all paperwork has a phone number and contact name so OA can contact the district if they have an issue).
- When both the “SAMII Vendor” and the SAMII EFT” columns are valid (green check mark), the record no longer appears in the grid.

| Contract #      | Event | Cooperator                | SAM II Vendor | SAM II EFT |
|-----------------|-------|---------------------------|---------------|------------|
| SGE 011-10-0007 | CNT   | VANMETER CATTLE CO        | ✔             | ✔          |
| SGE 011-10-0012 | CNT   | DENSIL, JR. ALLEN         | ⚠             | ✔          |
| SGE 011-10-0014 | CNT   | MICHAEL K CRAVENS         | ✖             | ✔          |
| SGE 011-10-0030 | CNT   | NED STEELMAN LIVING TRUST | ✔             | ✔          |
| SGE 011-10-0031 | CNT   | DANNY WEIGAND             | ⚠             | ✔          |

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## B. Documents and Scanning

### Things to Know:

- All signed cost share contracts, change orders, and contract payments must be scanned and associated with the appropriate contract payment in MoSWIMS before OA can issue a payment.
- Additional files, such as receipts, authorization forms, invoices, and other supporting documentation, may be scanned and uploaded to MoSWIMS at the district's discretion. Retain the original documents in hard copy at the district office.
- Maintain receipts from completed cost share practices:
  - To provide actual cost data to the "Actual Cost Database."
  - To verify that applicable NRCS standards and specifications have been met.

| Cost Share Documents |                      | Return to Previous Page      |             |
|----------------------|----------------------|------------------------------|-------------|
| <b>Contract #:</b>   | SA 001-10-0055 CO1   | <b>Status:</b> PENDING SCAN  |             |
| <b>FY:</b>           | 2010                 | <b>Obligated:</b> \$3,004.81 |             |
| <b>District:</b>     | 1 - DISTRICT         | <b>Extent CS:</b> \$3,004.81 |             |
| <b>Project:</b>      | SA - SENSITIVE AREAS |                              |             |
| Document List        |                      |                              |             |
| Document Type        | Date Attached        | User                         | Description |
|                      |                      |                              | Add File    |

### Enter Information:

1. Create a new folder on your desktop called "Cost Share Docs" (you will only need to create the folder once).
2. Open your internet browser (Internet Explorer) and choose your district's IP address from your "Favorites."
3. Click the "Scan Profile" button.
4. Click on the "Create Scan Profile" button. If a warning pops up, select "Run."
5. On the "Scan Profile" screen, click "Next."
6. On the second page of the "Scan Profile" screen, click the "Browse" button.
7. Select "Desktop," and then select the "Cost Share Docs" folder you created.
8. Name the file with the contract number and the event. For example, "SA114-10-0001 Cont," and "SA114-10-0001 Payment."
9. Use the word "Documents" as the profile name.
10. Click "Submit."  
**Note:** To scan a document, load it face up and header first in the printer/scanner's upright tray. (Refer to the diagram on the tray.)
11. Push the "Scan" button on the printer/scanner. The machine's display should read "Scan to Documents." Push the "Start" button on the printer/scanner to begin scanning.  
**Note:** If the display does not read "Scan to Documents," push the up and down arrows until it appears.
12. Return to the computer as the machine begins to scan. The status on the page should read "Image Received." If so, exit the status page.
13. Return to MoSWIMS and click on the "Documents" button.

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14. Click the “Add File” button.
  - a. Choose the desired document from the “Document Type” dropdown menu.
  - b. Upload individual documents in this order:
    - i. Add the “Contract” (original signed contract).
    - ii. Add “Change Order” contracts (CO1, CO2, CO3... upload individual change orders).
    - iii. Return to the “Contract Event Lookup” screen and click the “Submit Contract Payment” button.
    - iv. Add the “Contract Payment” (signed contract payment).
    - v. Add any other documents.
15. Next to “File Location,” click the “Browse...” button.
  - a. Navigate to the “Cost Share Docs” folder on the computer desktop.
  - b. Choose the appropriate document to upload.
  - c. Click “Open.”

16. Type a description in the “Description” text box for document types that allow multiple documents of the same type.

|                    |                           |                   |              |
|--------------------|---------------------------|-------------------|--------------|
| <b>Contract #:</b> | SA 001-10-0055 CO1        | <b>Status:</b>    | PENDING SCAN |
| <b>FY:</b>         | 2010                      | <b>Obligated:</b> | \$3,004.81   |
| <b>District:</b>   | 1 - DISTRICT              | <b>Extent CS:</b> | \$3,004.81   |
| <b>Project:</b>    | SA - 2010 SENSITIVE AREAS |                   |              |

| Document Type            | Date Attached | User | Description |
|--------------------------|---------------|------|-------------|
| *Document Type: <Select> |               |      |             |
| *File Location:          |               |      |             |
| User:                    | TWO, TEST     |      |             |
| *Description:            |               |      |             |

- a. “Change Orders,” “Invoices,” and “Supporting Documentation” document types require descriptions.
- b. Specify the change order number for “Change Order” descriptions (i.e. CO1).

17. Click “Add” to the lower, left side of the “Description” text box.
 

**Note:** Only the user who added a file can delete it. To delete a mistakenly added file, click the red “X” to the right of that file’s “Description” on the “Cost Share Documents” screen.

|                             |                      |                   |              |   |
|-----------------------------|----------------------|-------------------|--------------|---|
| <b>Cost Share Documents</b> |                      |                   |              | <a href="#">Return to Previous Page</a> |
| <b>Contract #:</b>          | SA 001-10-0055 CO1   | <b>Status:</b>    | PENDING SCAN |   |
| <b>FY:</b>                  | 2010                 | <b>Obligated:</b> | \$3,004.81   |   |
| <b>District:</b>            | 1 - DISTRICT         | <b>Extent CS:</b> | \$3,004.81   |   |
| <b>Project:</b>             | SA - SENSITIVE AREAS |                   |              |   |

| Document Type | Date Attached         | User      | Description    |   |
|---------------|-----------------------|-----------|----------------|---|
| CHANGE ORDER  | 11/19/2009 1:54:16 PM | TWO, TEST | Change order 1 | X |

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## C. Dates and Status

### Things to Know:

- From the main contract payment screen, click the “Dates and Status” button at the top, right corner of the screen.
- The payments grid will only display information for contract payments that have been submitted to the program office.
- If the district has entered a “Maintenance Agreement” date, dollar amount and/or “Inspection Due Date” and “Inspection Done Date” in the “Maintenance Agreement” screen, the information will appear on the “Dates and Status” screen in the appropriate sections.
- Districts will be able to view information pertaining to electronic transfers.
- To return to the main contract screen, click the “Return to Previous Page” button.

| Dates and Status Information    |                       |                        |         | Return to Previous Page |
|---------------------------------|-----------------------|------------------------|---------|-------------------------|
| Contract #: SGE 000-10-0017     |                       |                        |         |                         |
| Inspection Dates                |                       |                        |         |                         |
| No Maintenance Agreement Record |                       |                        |         |                         |
| Contract Payment Actions        |                       |                        |         |                         |
| Event                           | Action                | Action Date            | User ID |                         |
| CONTRACT                        | CONTRACT SUBMISSION   | 08/03/2009 1:02:13 PM  | NRNR1   |                         |
| CONTRACT                        | PO CONTRACT APPROVAL  | 08/04/2009 12:31:18 PM | NRNR2   |                         |
| CONTRACT                        | BOARD APPROVAL        | 08/06/2009 10:23:26 AM | NRNR1   |                         |
| CONTRACT PAYMENT                | BOARD APPROVAL        | 10/09/2009 2:56:30 PM  | NRNR1   |                         |
| CONTRACT PAYMENT                | SUBMITTAL             | 10/09/2009 2:57:48 PM  | NRNR1   |                         |
| CONTRACT PAYMENT                | CONTRACT SCAN         | 10/09/2009 2:58:14 PM  | NRNR1   |                         |
| CONTRACT PAYMENT                | PO RECEIVAL           | 10/09/2009 2:58:14 PM  | NRNR1   |                         |
| CONTRACT PAYMENT                | PO FINANCIAL APPROVAL | 10/13/2009 8:32:00 AM  | NRNR3   |                         |
| CONTRACT PAYMENT                | PAYMENT               | 10/16/2009 12:00:00 AM |         |                         |
| Change Grid Size                |                       |                        |         | Page 1 of 1             |
| Payments                        |                       |                        |         |                         |
| Payment Type                    | Payment Date          | Amount                 | Doc #   | Payment Number          |
| Initial Payment                 | 10/16/2009            | \$826.37               | 0511062 | 01409013                |

## D. Maintenance Information

### Things to Know:

- The “Maintenance Information” button is available once a contract payment is created.
- Enter the date the Maintenance Agreement was filed and if there was a dollar amount associated with the filing.
- Enter dates the inspection for the practice is scheduled and the date the inspection was completed.

| Maintenance Information Details                           |              |                   |                      |            |                          | Tips        | Notes | Return to Previous Page |       |
|---|--------------|-------------------|----------------------|------------|--------------------------|-------------|-------|-------------------------|-------|
| Fund Code:  | R            | Project:          | SA - SENSITIVE AREAS | Practice:  | WQ10- STREAM PROTECTION  | Contract #: | 55    | FY:                     | 2010  |
| Cooperator  |              |                   |                      |            |                          |             |       |                         |       |
| FARMVILLE FARMS<br>10 FARMERS ROAD<br>FARMVILLE, MO 60123 |              |                   |                      |            |                          |             |       |                         |       |
| Farm Tract  |              |                   |                      |            |                          |             |       |                         |       |
| Farm # 00001 // Tract # 2306 // Sec : 3 Twn: 45 Rng: 67   |              |                   |                      |            |                          |             |       |                         |       |
| Field Number  | Acres Served | Extents Installed | Units                |            |                          |             |       |                         |       |
| 3, 8  | 4.60         | 4.6000            | FT                   |            |                          |             |       |                         |       |
| Contract Max  | Other \$     | Other Description | Extent CS            |            |                          |             |       |                         |       |
|   |              |                   | \$3,004.81           |            |                          |             |       |                         |       |
| Update Maintenance Information                            |              |                   |                      |            |                          |             |       |                         |       |
| Maintenance Agreement Date                                |              |                   |                      | 11/19/2009 | Maintenance Agreement \$ |             |       |                         | 50.00 |
| Update/Add Inspection Dates                               |              |                   |                      |            |                          |             |       |                         |       |
| Inspection Due Date                                       |              |                   |                      |            | Inspection Done Date     |             |       |                         |       |
| Clear Add   |              |                   |                      |            |                          |             |       |                         |       |
| Inspection Due  |              |                   |                      |            | Inspection Done          |             |       |                         |       |
| 11/18/2011  |              |                   |                      |            |                          |             |       |                         |       |

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## **Enter Information:**

1. From the main contract payment screen, click the “Maintenance Info” button.
  2. Enter the “Maintenance Agreement Date” and/or “Maintenance Agreement \$.”
  3. Click the “Update” button to save the information.
  4. In the lower section, fill in the “Inspection Due Date” and “Inspection Done Date” fields and click the “Add” button to add new records.
  5. In the lower grid, the user will see a small data table containing all of the “Inspection Due Date” and “Inspection Done Date” fields.
  6. To edit a set of dates, click the pencil icon next to the record. The record will fill the editor.
  7. Make the changes and then click the “Update” button.
    - a. There is no delete option for this feature.
    - b. Once a date is created, the user cannot delete the entire record.
- To return to the main contract screen, click the “Return to Previous Page” button.