

# Financial Services



# Purpose

Financial Services allows customers that have a registered level 2 e-authentication ID and password to create the following:

- Assignments – transfer of eligible FSA or CCC payment to 3<sup>rd</sup> party.
- Joint Payments – payment made to customer and 3<sup>rd</sup> party.
- Direct Deposits –transfer of payments electronically from payer to payee’s bank account.

# How Producer's Obtain Financial Services Access



For producers to obtain access to Financial Services, they must obtain level 2 USDA eAuthentication credentials.

- To request access, the producer must register for this access by creating an account. Click the link below to be taken to the eAuthentication Home Page and Click “Create an Account”
  - <https://www.eauth.usda.gov/mainPages/index.aspx>
- The following link provides the registration process for producers:
  - [http://www.fsa.usda.gov/Internet/FSA\\_File/eauth\\_regist\\_guide\\_level2.pdf](http://www.fsa.usda.gov/Internet/FSA_File/eauth_regist_guide_level2.pdf)

**Note:** County Offices must also ensure that Producers are linked in SCIMS.
- Once, the producer has access, the following link will provide producers access to log in to Financial Services
  - <https://apps.fsa.usda.gov/FSAFS/login.do>



# Financial Services Website



- <https://apps.fsa.usda.gov/FSAFS/login.do>

Producers may click on the eforms link below to locate forms needed to complete Financial Service actions: <http://forms.sc.egov.usda.gov/eForms/welcomeAction.do?Home>

For example:

- Form CCC-36-Assignment of Payment
- Form CCC-37-Joint Payment Authorization



# Logging On To Financial Services

\*\*\*\*\*WARNING\*\*\*\*\*

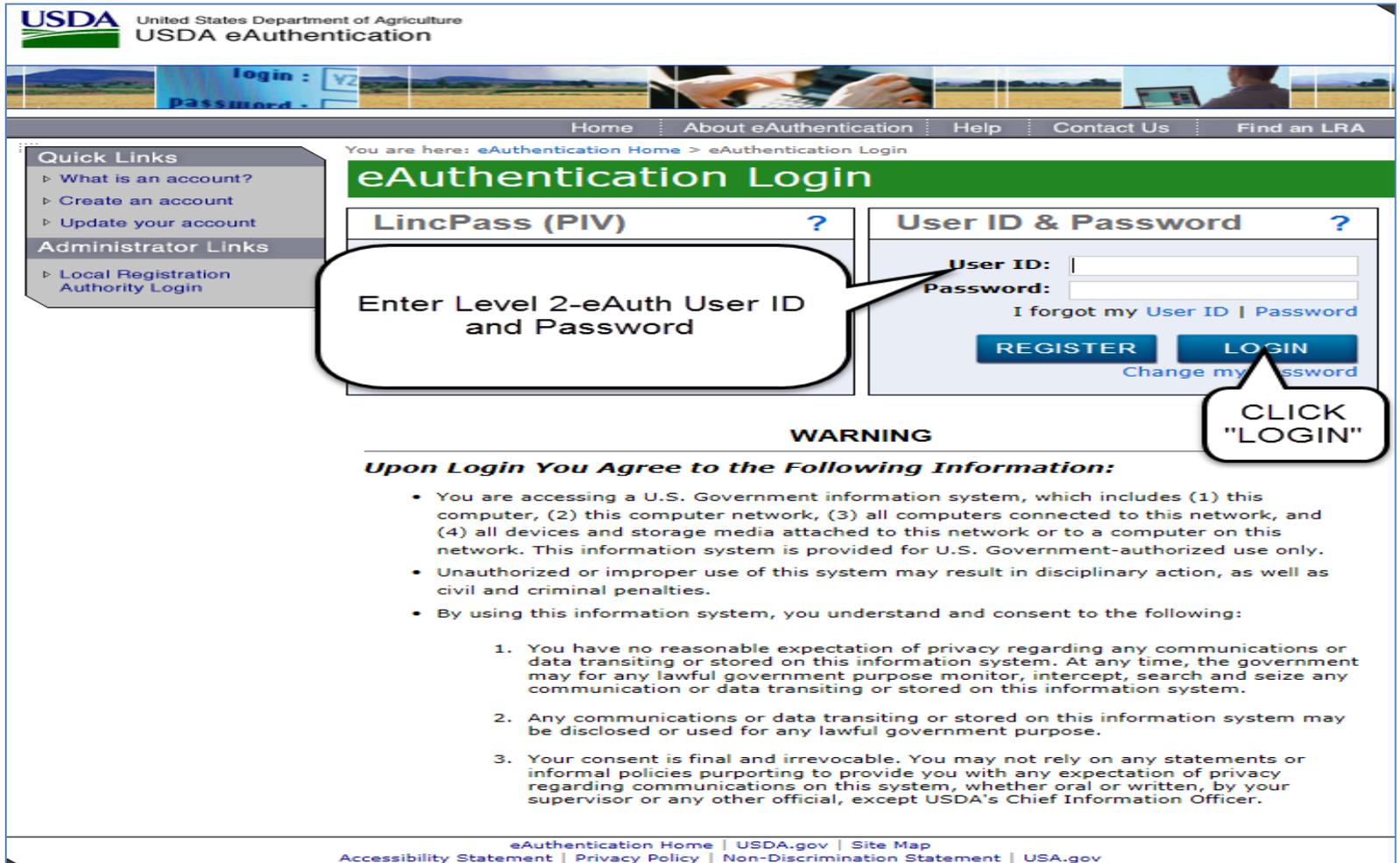
- You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.
- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.
- By using this information system, you understand and consent to the following:
  - You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
  - Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
  - Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA's Chief Information Officer.

\*\*\*\*\*WARNING\*\*\*\*\*

Cancel I Agree

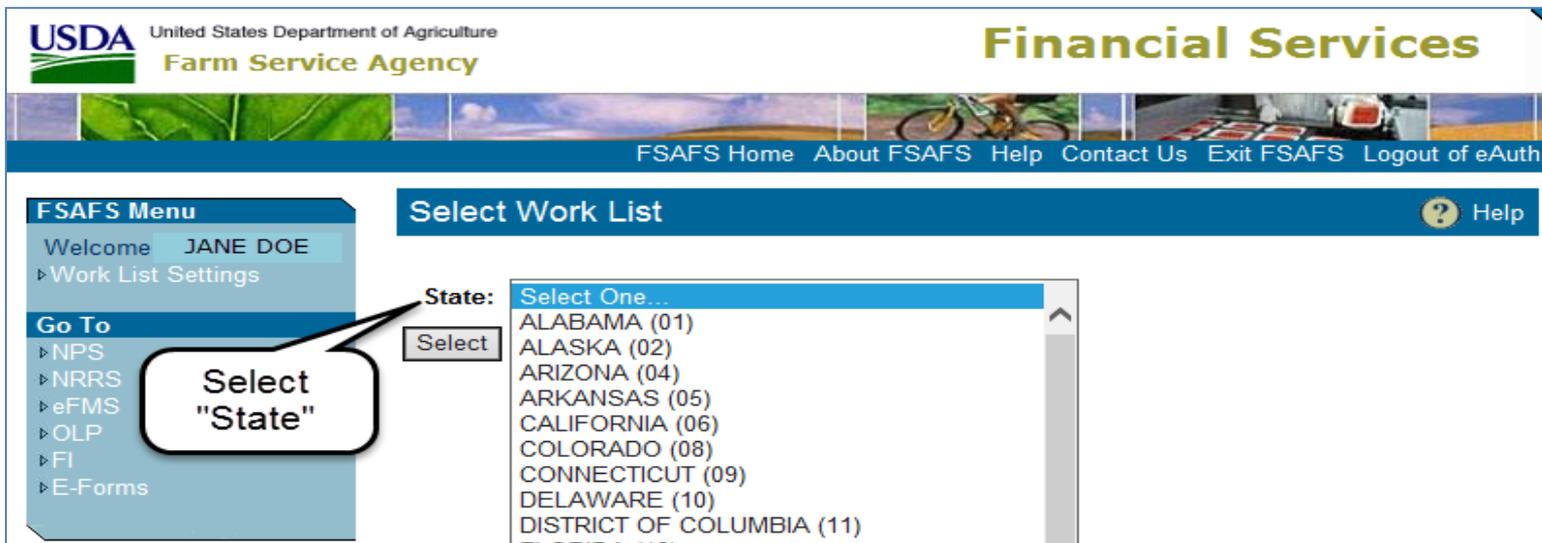
Select "I Agree" from the e-auth warning screen

# Logging on to Financial Service (Cont.)



The screenshot shows the USDA eAuthentication Login page. At the top, it says "USDA United States Department of Agriculture USDA eAuthentication". Below this is a navigation bar with links: Home, About eAuthentication, Help, Contact Us, Find an LRA. The main heading is "eAuthentication Login". There are two main login options: "LincPass (PIV)" and "User ID & Password". The "User ID & Password" form has fields for "User ID:" and "Password:", a "REGISTER" button, a "LOGIN" button, and a link for "I forgot my User ID | Password" and "Change my password". A callout bubble points to the "LOGIN" button with the text "CLICK 'LOGIN'". Another callout bubble points to the "User ID & Password" form with the text "Enter Level 2-eAuth User ID and Password". Below the login forms is a "WARNING" section with the text "Upon Login You Agree to the Following Information:" followed by a list of terms and conditions. At the bottom, there are links for "eAuthentication Home", "USDA.gov", "Site Map", "Accessibility Statement", "Privacy Policy", "Non-Discrimination Statement", and "USA.gov".

# Selecting State and County



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Financial Services

FSAFS Home About FSAFS Help Contact Us Exit FSAFS Logout of eAuth

**FSAFS Menu**  
Welcome JANE DOE  
Work List Settings

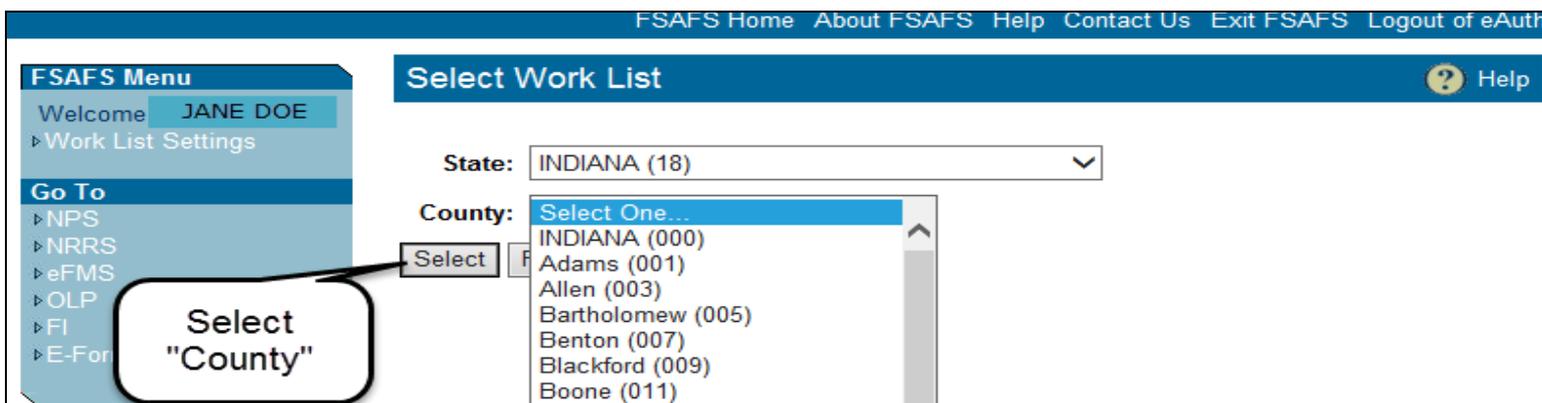
**Go To**  
NPS  
NRRS  
eFMS  
OLP  
FI  
E-Forms

**Select Work List** ? Help

State:

- ALABAMA (01)
- ALASKA (02)
- ARIZONA (04)
- ARKANSAS (05)
- CALIFORNIA (06)
- COLORADO (08)
- CONNECTICUT (09)
- DELAWARE (10)
- DISTRICT OF COLUMBIA (11)
- FLORIDA (12)

Select



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**FSAFS Menu**  
Welcome JANE DOE  
Work List Settings

**Go To**  
NPS  
NRRS  
eFMS  
OLP  
FI  
E-Forms

**Select Work List** ? Help

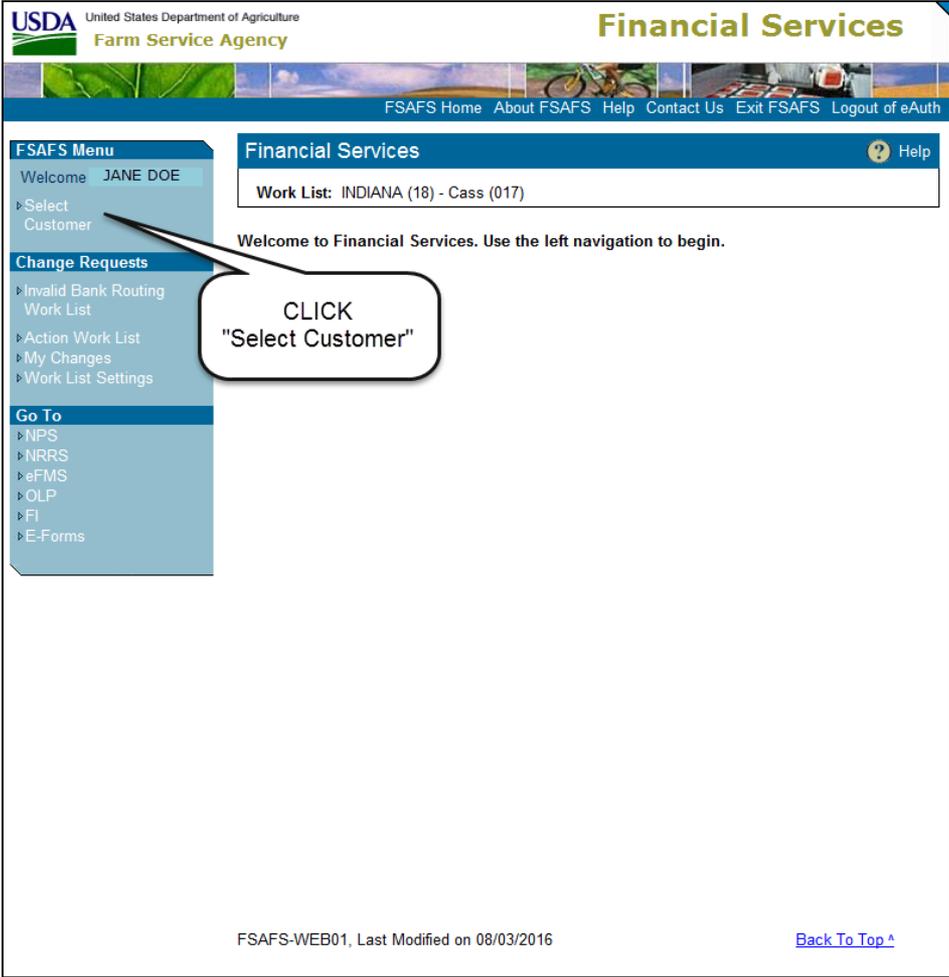
State:

County:

- INDIANA (000)
- Adams (001)
- Allen (003)
- Bartholomew (005)
- Benton (007)
- Blackford (009)
- Boone (011)

Select

# Selecting Customer



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**FSAFS Menu**  
Welcome JANE DOE  
▶ Select Customer  
**Change Requests**  
▶ Invalid Bank Routing Work List  
▶ Action Work List  
▶ My Changes  
▶ Work List Settings  
**Go To**  
▶ NPS  
▶ NRRS  
▶ eFMS  
▶ OLP  
▶ FI  
▶ E-Forms

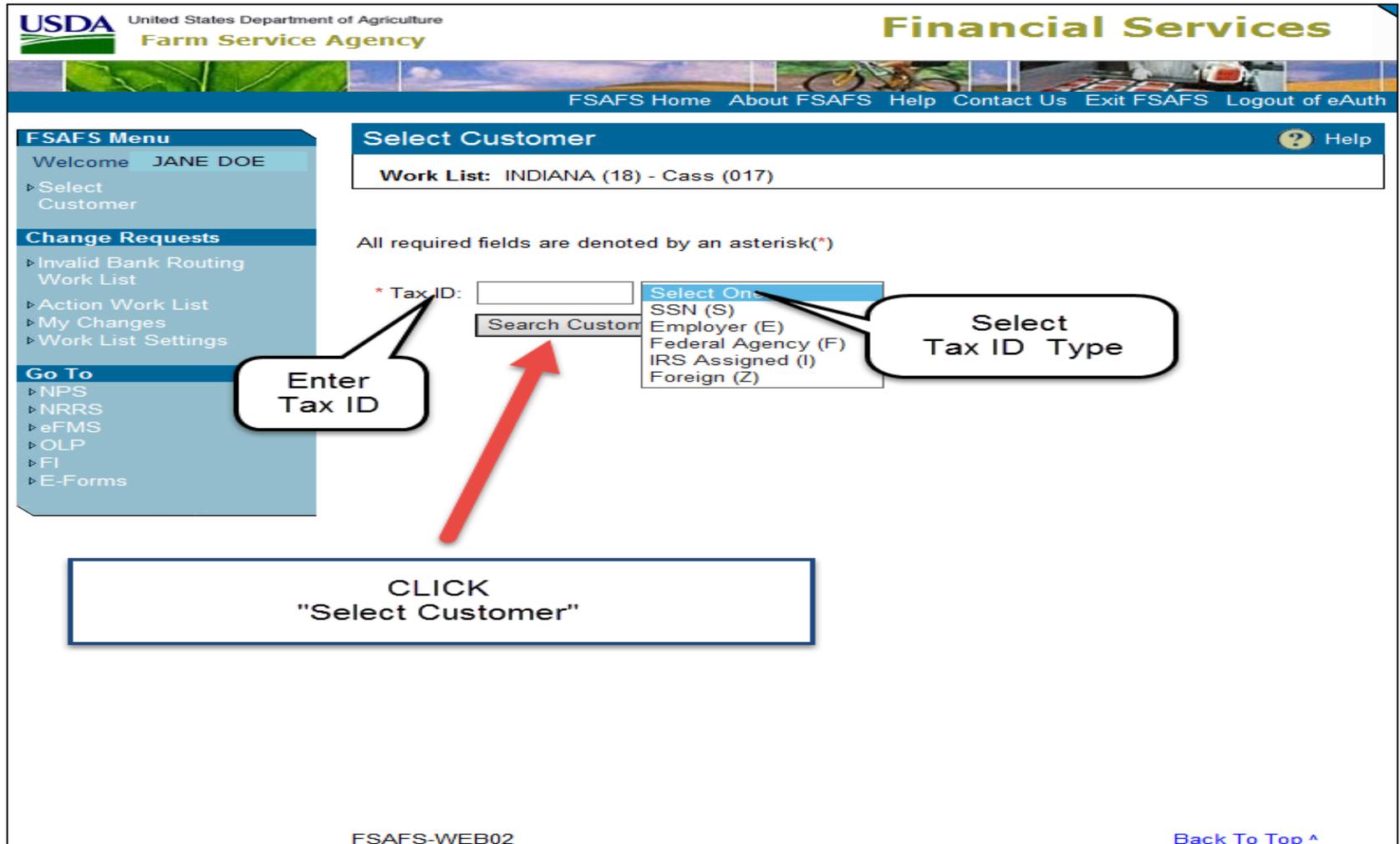
**Financial Services** ? Help  
**Work List:** INDIANA (18) - Cass (017)

Welcome to Financial Services. Use the left navigation to begin.

CLICK "Select Customer"

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# Entering TAX ID and Tax ID Type



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**FSAFS Menu**  
Welcome JANE DOE  
▶ Select Customer  
**Change Requests**  
▶ Invalid Bank Routing Work List  
▶ Action Work List  
▶ My Changes  
▶ Work List Settings  
**Go To**  
▶ NPS  
▶ NRRS  
▶ eFMS  
▶ OLP  
▶ FI  
▶ E-Forms

**Select Customer** Help

Work List: INDIANA (18) - Cass (017)

All required fields are denoted by an asterisk(\*)

\* Tax ID:  **Select One**  
SSN (S)  
Employer (E)  
Federal Agency (F)  
IRS Assigned (I)  
Foreign (Z)

Search Customer

Enter Tax ID

Select Tax ID Type

CLICK "Select Customer"

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# FSAFS Menu for Direct Deposit Options



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Financial Services ? Help

Work List: INDIANA (18) - Cass (017)  
Customer: JANE DOE

Welcome to Financial Ser

**FSAFS Menu**

- Welcome JANE DOE
- ▶ Pending Changes
- ▶ Back to Main Menu

**Assignments**

- ▶ Assignor View
- ▶ Assignee View
- ▶ Add Assignment

**Joint payments**

- ▶ View Joint Payment
- ▶ Add Joint Payment

**Direct Deposit**

- ▶ View Direct Deposit
- ▶ Add Direct Deposit
- ▶ Direct Deposit Waiver

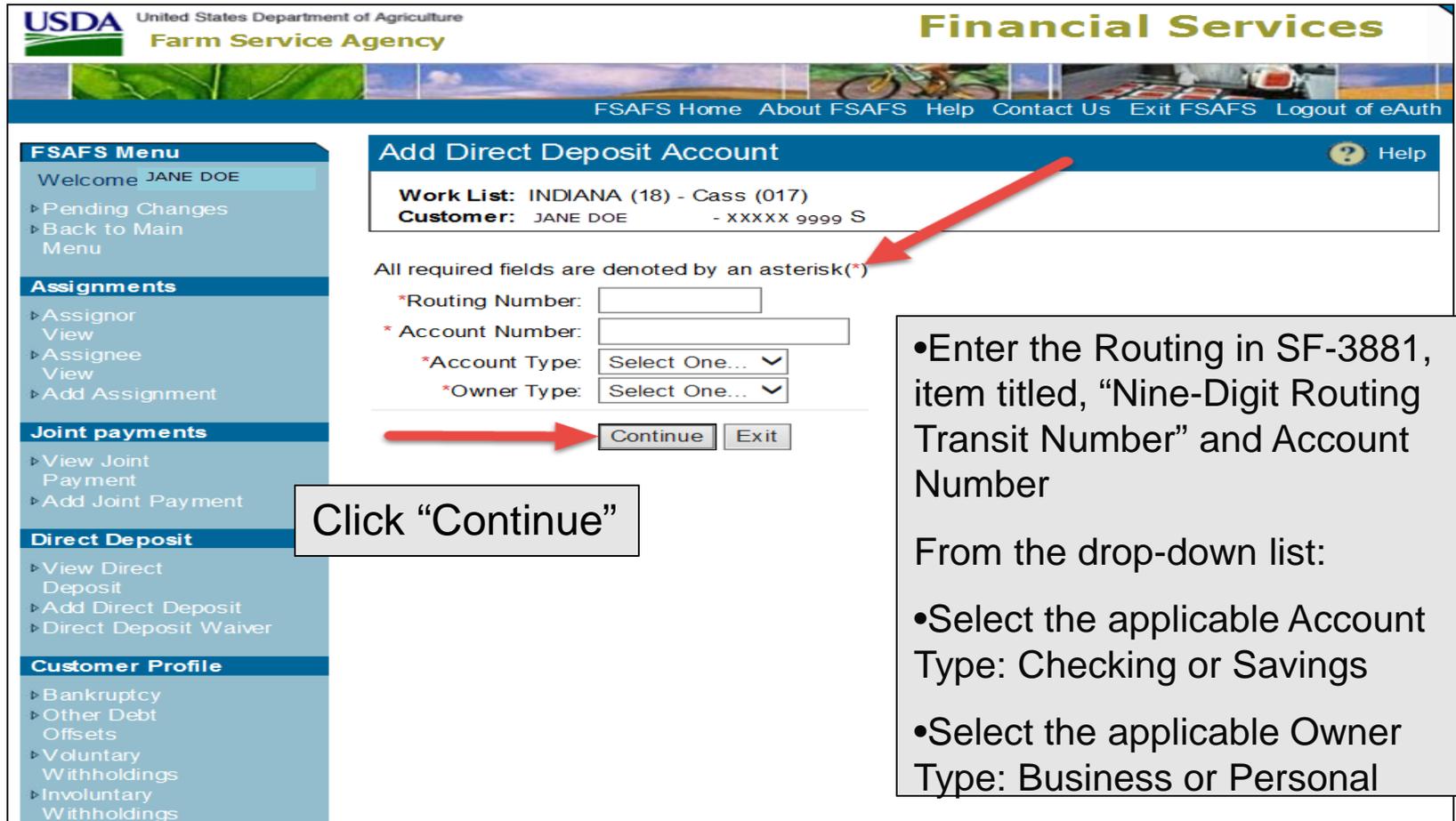
**Customer Profile**

- ▶ Bankruptcy
- ▶ Other Debt Offsets
- ▶ Voluntary Withholdings
- ▶ Involuntary Withholdings

- **View Direct Deposit:** Allows County Office employees to view a list of direct deposit statuses associated with a producer selected as the customer.
- **Add Direct Deposit:** Allow County Office employees to create a Direct Deposit Main Account or Direct Deposit Sub-Account from the entry page.
- **Direct Deposit:** Allows County Office employees to create a Direct Deposit Waiver or record a customer's FFAS-12, written, or verbal election to waiver direct deposit.



# Add Direct Deposit Main Account



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**FSAFS Menu**  
Welcome JANE DOE  
 ▶ Pending Changes  
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**Assignments**  
 ▶ Assignor View  
 ▶ Assignee View  
 ▶ Add Assignment

**Joint payments**  
 ▶ View Joint Payment  
 ▶ Add Joint Payment

**Direct Deposit**  
 ▶ View Direct Deposit  
 ▶ Add Direct Deposit  
 ▶ Direct Deposit Waiver

**Customer Profile**  
 ▶ Bankruptcy  
 ▶ Other Debt Offsets  
 ▶ Voluntary Withholdings  
 ▶ Involuntary Withholdings

**Add Direct Deposit Account** Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXXX 9999 S

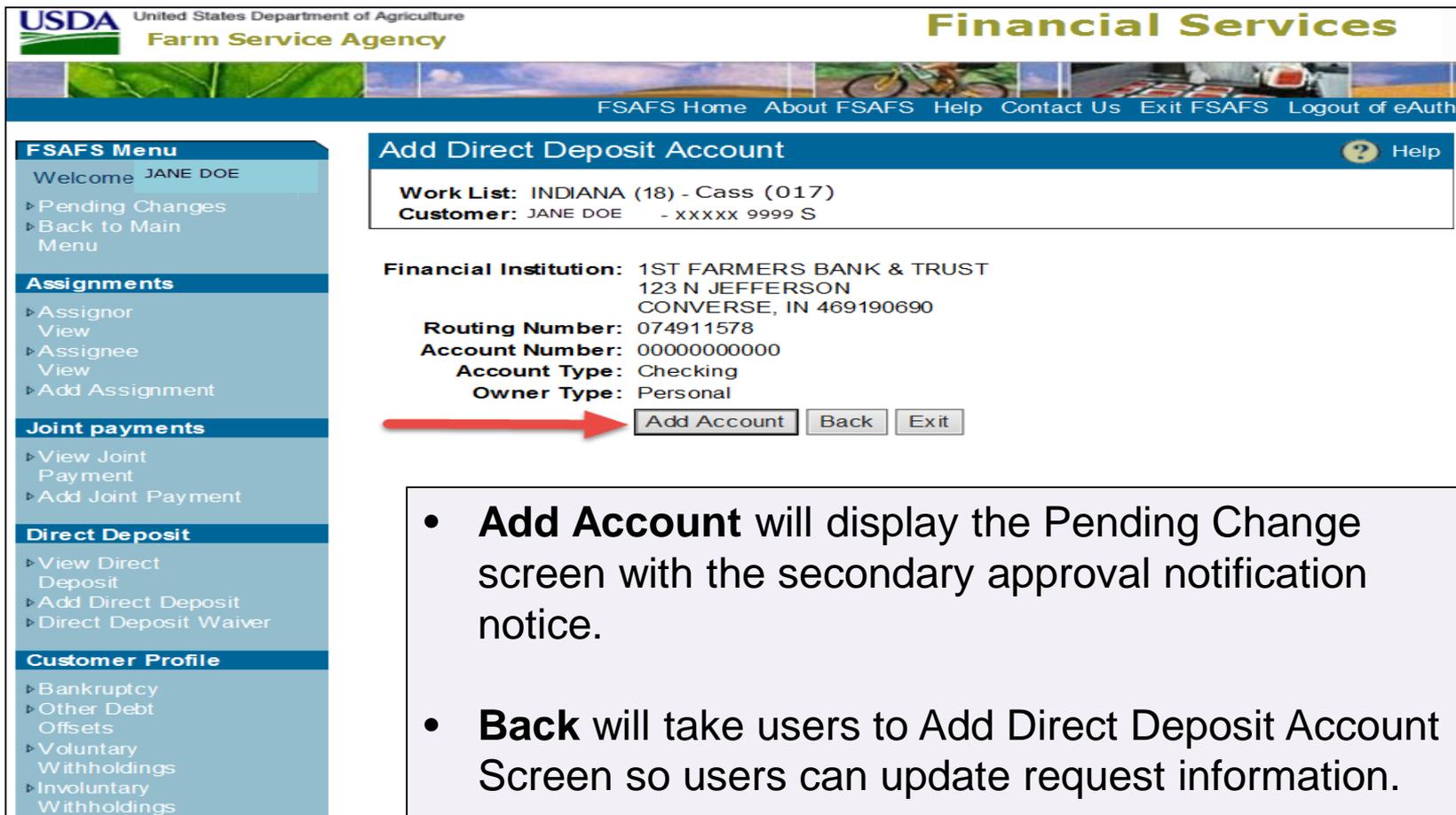
All required fields are denoted by an asterisk(\*)

\*Routing Number:   
 \*Account Number:   
 \*Account Type:   
 \*Owner Type:

Click "Continue"

- Enter the Routing in SF-3881, item titled, "Nine-Digit Routing Transit Number" and Account Number
- From the drop-down list:
  - Select the applicable Account Type: Checking or Savings
  - Select the applicable Owner Type: Business or Personal

# Add Direct Deposit Main Account (Cont.)



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**Add Direct Deposit Account** ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXX 9999 S

**Financial Institution:** 1ST FARMERS BANK & TRUST  
123 N JEFFERSON  
CONVERSE, IN 469190690

**Routing Number:** 074911578  
**Account Number:** 00000000000  
**Account Type:** Checking  
**Owner Type:** Personal

**Add Account** **Back** **Exit**

**FSAFS Menu**  
Welcome JANE DOE  
▶ Pending Changes  
▶ Back to Main Menu

**Assignments**  
▶ Assignor View  
▶ Assignee View  
▶ Add Assignment

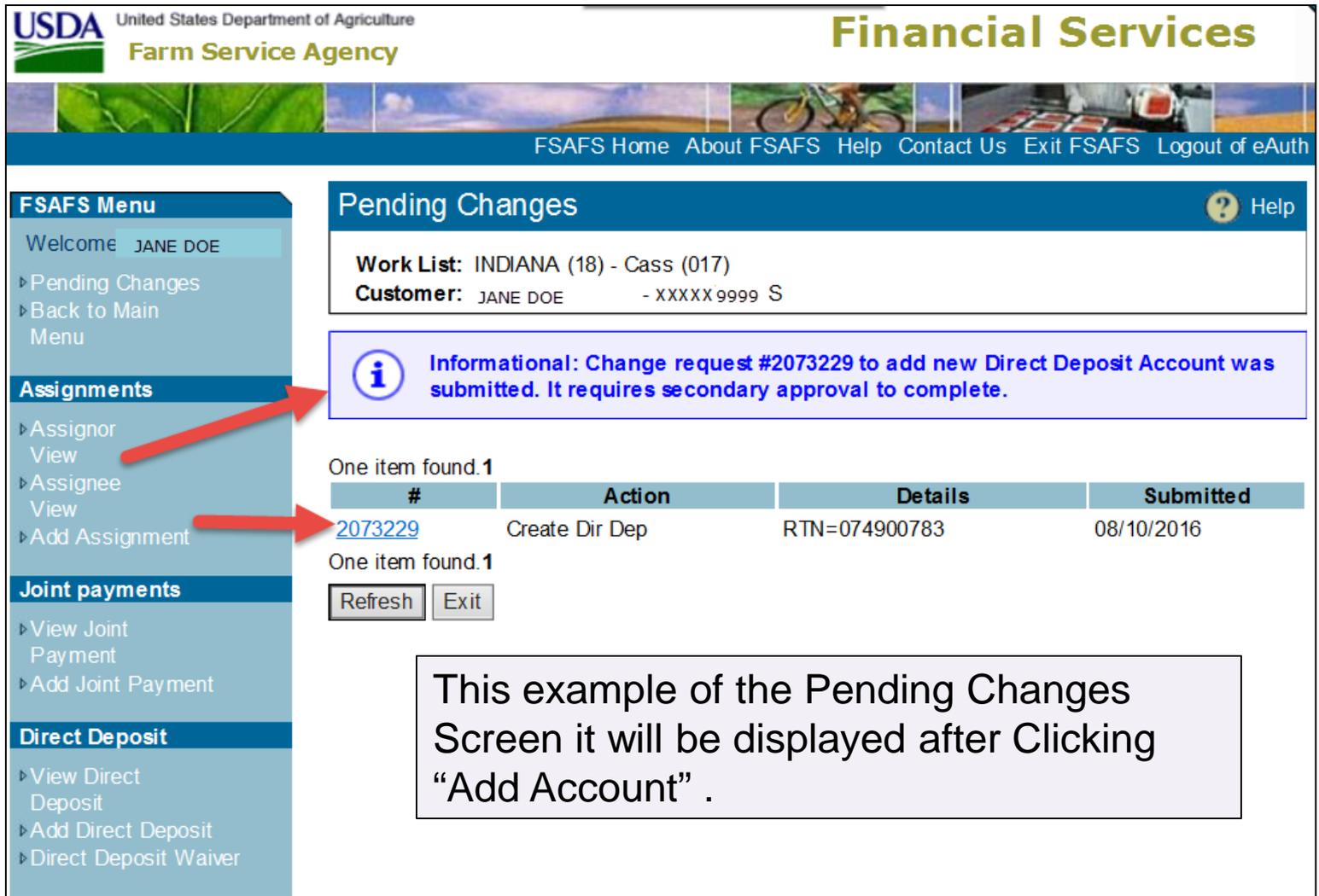
**Joint payments**  
▶ View Joint Payment  
▶ Add Joint Payment

**Direct Deposit**  
▶ View Direct Deposit  
▶ Add Direct Deposit  
▶ Direct Deposit Waiver

**Customer Profile**  
▶ Bankruptcy  
▶ Other Debt Offsets  
▶ Voluntary Withholdings  
▶ Involuntary Withholdings

- **Add Account** will display the Pending Change screen with the secondary approval notification notice.
- **Back** will take users to Add Direct Deposit Account Screen so users can update request information.
- **Exit** My Changes Screen will be displayed without saving the data.

# Add Direct Deposit Main Account (Cont.)



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**FSAFS Menu**

- Welcome JANE DOE
- ▶ Pending Changes
- ▶ Back to Main Menu
- Assignments**
- ▶ Assignor View
- ▶ Assignee View
- ▶ Add Assignment
- Joint payments**
- ▶ View Joint Payment
- ▶ Add Joint Payment
- Direct Deposit**
- ▶ View Direct Deposit
- ▶ Add Direct Deposit
- ▶ Direct Deposit Waiver

**Pending Changes** ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXXX'9999 S

**Informational:** Change request #2073229 to add new Direct Deposit Account was submitted. It requires secondary approval to complete.

One item found. 1

#	Action	Details	Submitted
<a href="#">2073229</a>	Create Dir Dep	RTN=074900783	08/10/2016

One item found. 1

This example of the Pending Changes Screen it will be displayed after Clicking "Add Account" .

# Direct Deposit Secondary Approval



Authorized County Office employee, other than the originating employee, may approve a direct deposit account change request. The secondary approving employee must verify the direct deposit detail against SF-3881.



# Direct Deposit Secondary Approval (Cont.)



Under FSAFS Menu, Click “Action Work List” the “Change Request Screen” will be displayed Click item number to continue to “Account Change Request Screen”.

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**FSAFS Menu**

Welcome JANE DOE

- Select Customer
- Change Requests**
- Invalid Bank Routing Work List
- Action Work List
- My Changes

**Change Requests** Help

Work List: INDIANA (18) - Cass (017)

One item found. 1

#	Tax ID	Action	Details	Submitted
<a href="#">2073229</a>	x7375	Create Dir Dep	RTN=074911578	08/10/2016

One item found. 1

# Direct Deposit Secondary Approval (Cont.)



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**FSAFS Menu**  
Welcome JANE DOE  
▶ Select Customer  
**Change Requests**  
▶ Invalid Bank Routing Work List  
▶ Action Work List  
▶ My Changes  
▶ Work List Settings  
**Go To**  
▶ NPS  
▶ NRRS  
▶ eFMS

**Account Change Request** Help

**Work List:** INDIANA (18) - Cass (017)

**Request #:** 2073229 **Submitted (mm/dd/yyyy):** 08/10/2016 **Status:** Awaiting Approval

**Customer:** JANE DOE - xxxxx 9999 S

**Financial Institution:** 1ST FARMERS BANK & TRUST  
123 N JEFFERSON  
CONVERSE, IN 469190690

**Routing Number:** 074911578

**Verify Information for Approval:**

\* Account Number:   
\* Account Type:   
\* Owner Type:

Last changed 08/10/2016 in INDIANA (18) - Cass (017)



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Verify information for approval:

- Account Number
- Account Type
- Owner Type
- Click Approve Request

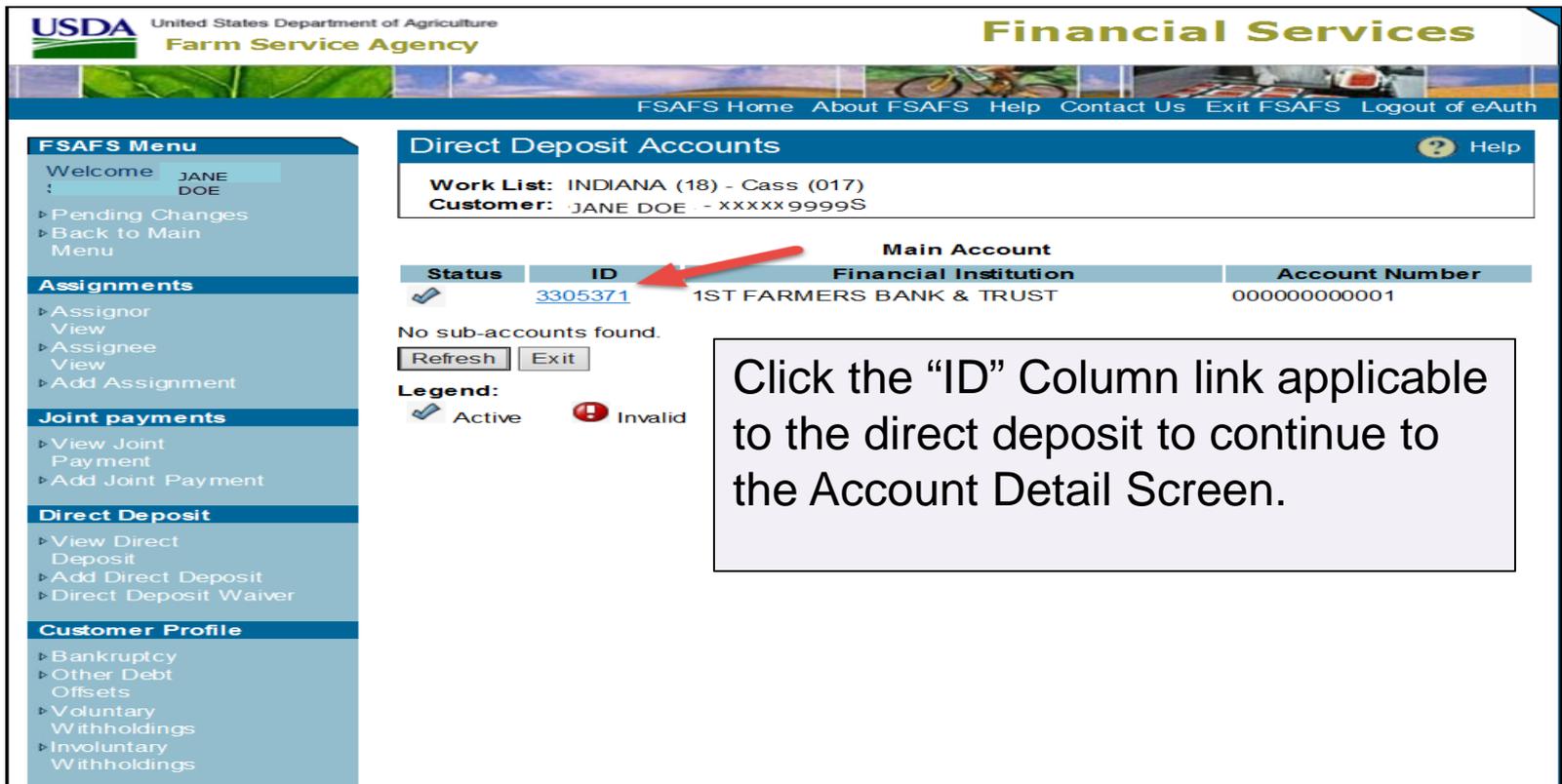
Note: Direct Deposit may be canceled when is in pending status

# Modifying Direct Deposit

To modify direct deposit records when a customer has only 1 main account. Under FSAFS Menu, Click “Select Customer” Enter TIN and type. Under FSAFS Menu Direct Deposit, Click View Direct Deposit” the Direct Deposit Accounts Screen will be displayed.

# Modifying Direct Deposit (Cont.)

Example of the Direct Deposit Account screen with single direct deposit account:



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**FSAFS Menu**

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**Assignments**

- Assignor View
- Assignee View
- Add Assignment

**Joint payments**

- View Joint Payment
- Add Joint Payment

**Direct Deposit**

- View Direct Deposit
- Add Direct Deposit
- Direct Deposit Waiver

**Customer Profile**

- Bankruptcy
- Other Debt Offsets
- Voluntary Withholdings
- Involuntary Withholdings

**Direct Deposit Accounts** Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXXX9999S

Status	ID	Main Account	Financial Institution	Account Number
<input checked="" type="checkbox"/>	<a href="#">3305371</a>		1ST FARMERS BANK & TRUST	000000000001

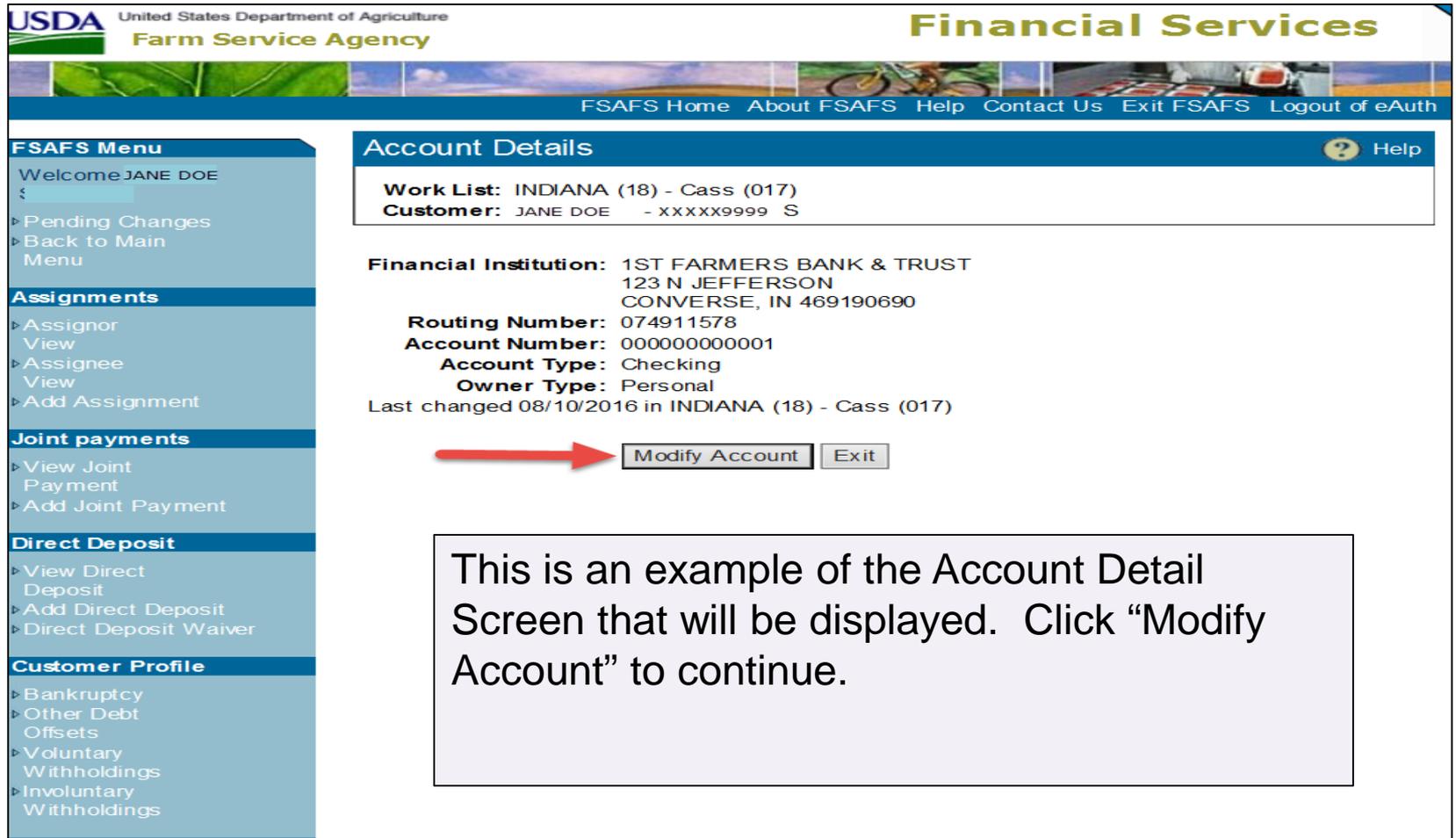
No sub-accounts found.

**Legend:**  
 Active  Invalid

Click the "ID" Column link applicable to the direct deposit to continue to the Account Detail Screen.



# Modifying Direct Deposit (Cont.)



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- View Joint Payment
- Add Joint Payment

**Direct Deposit**

- View Direct Deposit
- Add Direct Deposit
- Direct Deposit Waiver

**Customer Profile**

- Bankruptcy
- Other Debt Offsets
- Voluntary Withholdings
- Involuntary Withholdings

**Account Details** ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXXX9999 S

**Financial Institution:** 1ST FARMERS BANK & TRUST  
123 N JEFFERSON  
CONVERSE, IN 469190690

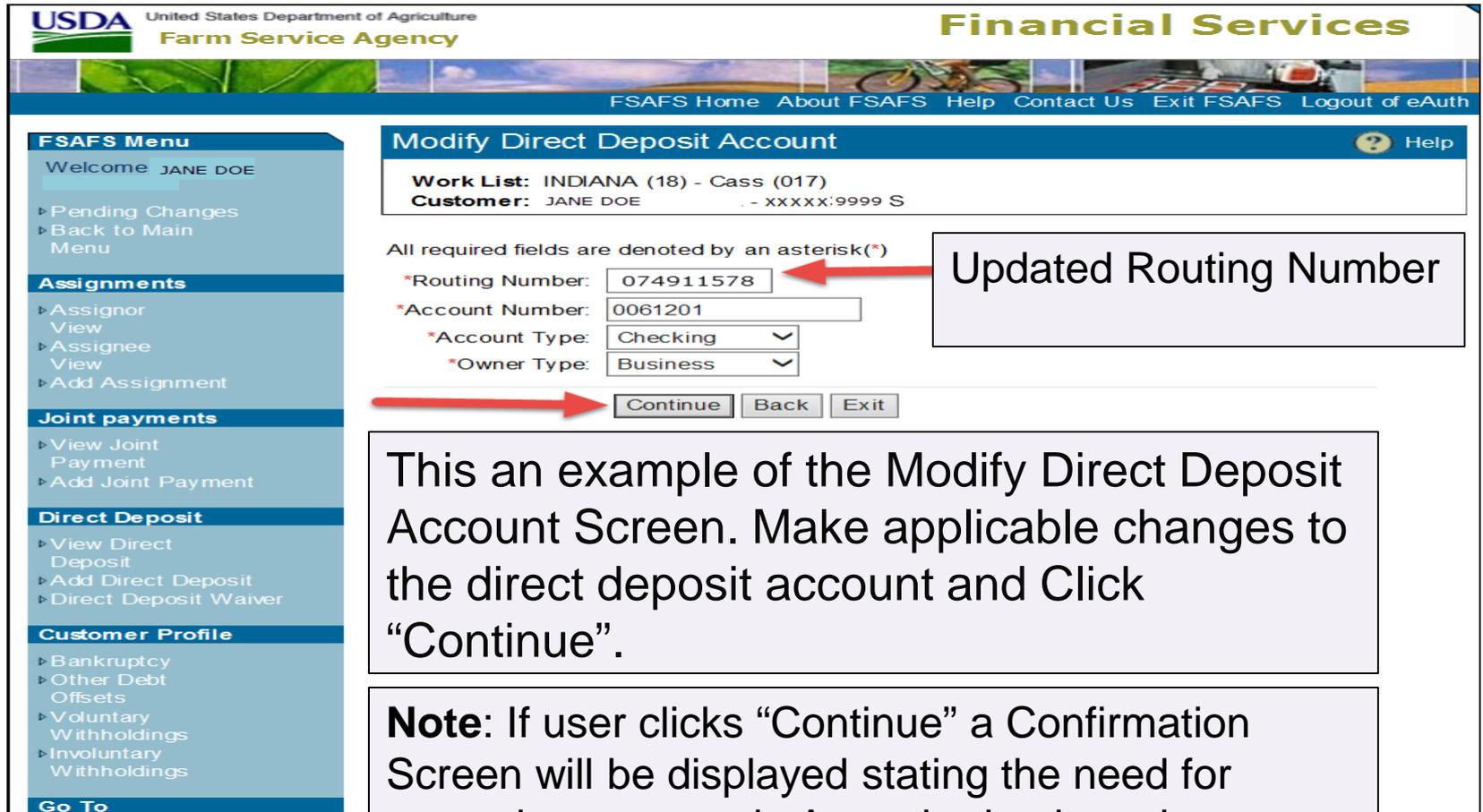
**Routing Number:** 074911578  
**Account Number:** 000000000001  
**Account Type:** Checking  
**Owner Type:** Personal

Last changed 08/10/2016 in INDIANA (18) - Cass (017)



This is an example of the Account Detail Screen that will be displayed. Click “Modify Account” to continue.

# Modifying Direct Deposit (Cont.)



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- ▶ Add Assignment

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- ▶ View Joint Payment
- ▶ Add Joint Payment

**Direct Deposit**

- ▶ View Direct Deposit
- ▶ Add Direct Deposit
- ▶ Direct Deposit Waiver

**Customer Profile**

- ▶ Bankruptcy
- ▶ Other Debt Offsets
- ▶ Voluntary Withholdings
- ▶ Involuntary Withholdings

**Go To**

**Modify Direct Deposit Account** Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXXX:9999 S

All required fields are denoted by an asterisk(\*)

\*Routing Number:  ← Updated Routing Number

\*Account Number:

\*Account Type:

\*Owner Type:

This an example of the Modify Direct Deposit Account Screen. Make applicable changes to the direct deposit account and Click “Continue”.

**Note:** If user clicks “Continue” a Confirmation Screen will be displayed stating the need for secondary approval. An authorized employee can provide the approval to complete the update request.

# Adding Sub-Accounts Direct Deposit



- The Direct Deposit Sub-Account is only necessary when a direct deposit needs to be specified by program category, location and reference code. Sub-accounts shall not be established using same bank routing and same account number used on the primary direct deposit profile. Verification with the customer that there are multiple active accounts is required. A customer may have multiple sub accounts, but only 1 main account.
- Specific State/county option is only allowed for multiple-county producers. And a specific reference type.
- If a main account is deleted by processing a waiver, all sub-accounts will be deleted. To avoid deleting all sub-accounts, the main account may be overwritten with new account information.

**Note:** Financial institution must be continue to be loaded in Business Partner with proper TIN, if the financial institution is receiving a payment from an assignment.



# Adding Sub-Accounts Direct Deposit (Cont.)



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**Direct Deposit**  
▶ View Direct Deposit

**Add Direct Deposit Account** Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - xxxxx9999S

All required fields are denoted by an asterisk(\*)

\*Routing Number:   
\* Account Number:   
\*Account Type:   
\*Owner Type:

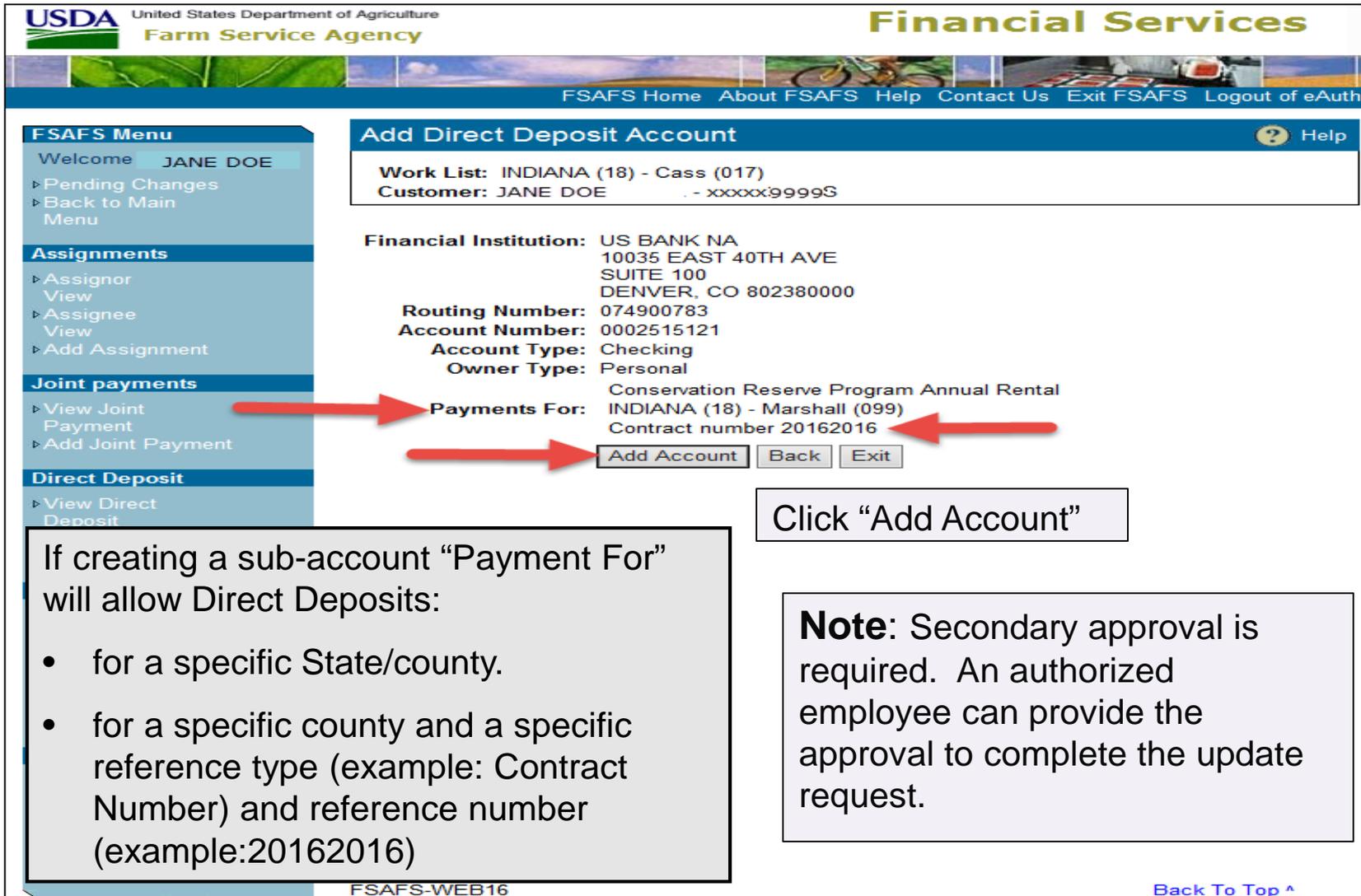
Payments for:  
Program Category:   
\* Payments For:   
Reference:

- Enter the Routing and Account Number
- Select the applicable Account Type: Checking or Savings
- Select the applicable Owner Type: Business or Personal

**NOTE:** The first elected direct deposit account will reflect “all” payments to that account. Customer may further specify sub-accounts for particular program benefits. Sub-accounts can be established by Program Category State/county and/or county and reference code.



# Adding Direct Deposit Sub-Accounts (Cont.)



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**Assignments**  
▶ Assignor View  
▶ Assignee View  
▶ Add Assignment

**Joint payments**  
▶ View Joint Payment  
▶ Add Joint Payment

**Direct Deposit**  
▶ View Direct Deposit

**Add Direct Deposit Account** ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE . - xxxxx9999S

**Financial Institution:** US BANK NA  
10035 EAST 40TH AVE  
SUITE 100  
DENVER, CO 802380000

**Routing Number:** 074900783  
**Account Number:** 0002515121  
**Account Type:** Checking  
**Owner Type:** Personal

**Payments For:** Conservation Reserve Program Annual Rental  
INDIANA (18) - Marshall (099)  
Contract number 20162016

Click "Add Account"

If creating a sub-account "Payment For" will allow Direct Deposits:

- for a specific State/county.
- for a specific county and a specific reference type (example: Contract Number) and reference number (example:20162016)

**Note:** Secondary approval is required. An authorized employee can provide the approval to complete the update request.

USDA

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# Direct Deposit Waiver



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- Add Assignment

**Joint payments**

- View Joint Payment
- Add Joint Payment

**Direct Deposit**

- View Direct Deposit
- Add Direct Deposit
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**Customer Profile**

- Bankruptcy
- Other Debt Offsets
- Voluntary Withholdings
- Involuntary Withholdings

**Go To**

- NPS
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- eFMS
- OLP
- FI
- E-Forms

### Add Direct Deposit Hardship Waiver ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE . - xxxxx:9999S

**i** **Informational: All pending Direct Deposit records will be deleted.**

The Secretary of Treasury has granted a waiver of the requirement to receive a Federal payment by electronic funds transfer (EFT) for individuals if the individual determines, at his or her sole discretion, that:

- Payment by EFT would impose a hardship due to a physical or mental disability
- The individual faces a geographic, language, or literacy barrier to receiving payment by EFT
- Payment by EFT poses a financial hardship to the individual

I have determined that payment by EFT creates a hardship, and I invoke this waiver.

If a Direct Deposit Waiver request is submitted, it will be applied to all counties. This option will delete all direct deposit accounts.

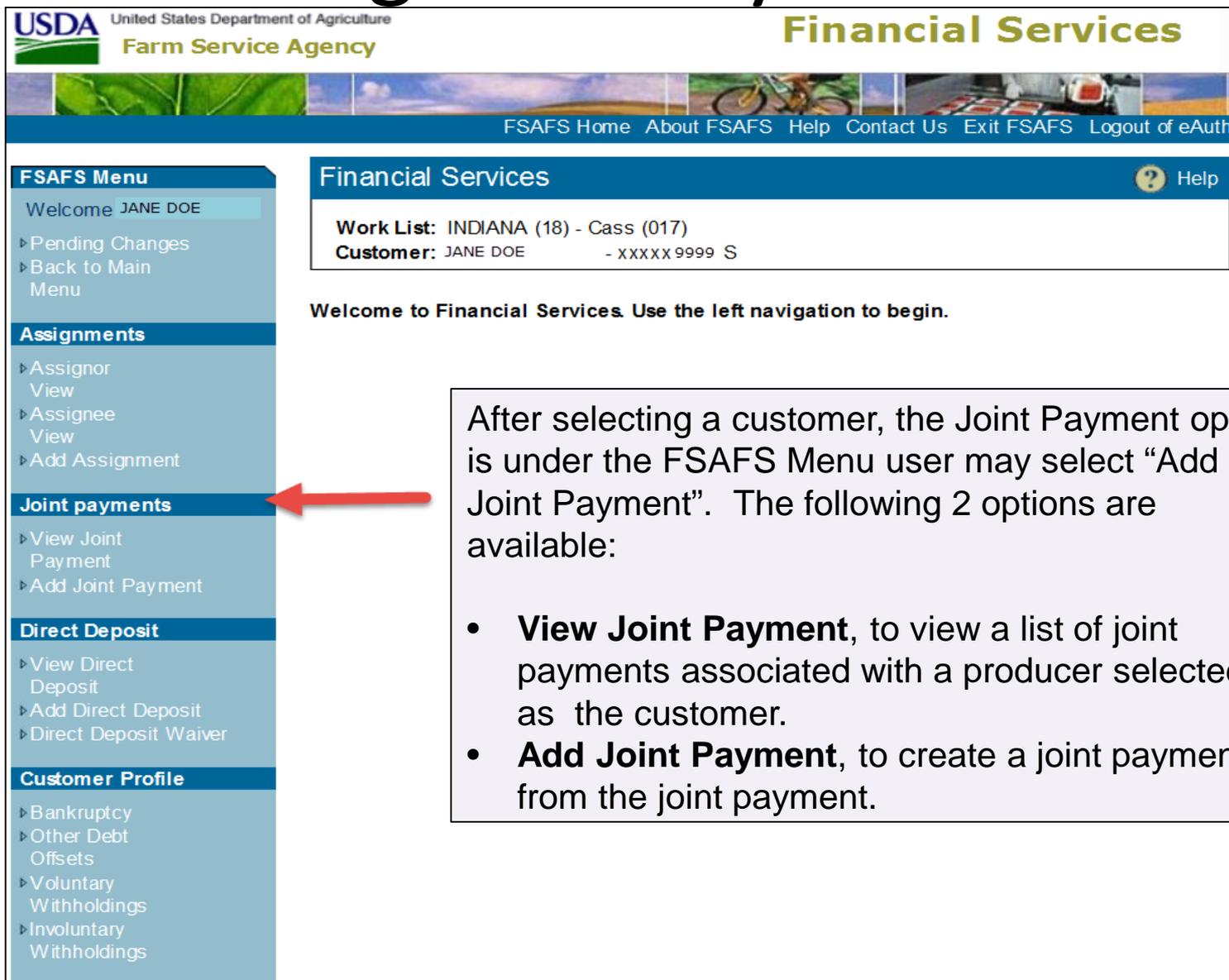
Customer payments will be disbursed via checks.

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# Adding Joint Payments




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**FSAFS Menu**

Welcome JANE DOE

- Pending Changes
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**Assignments**

- Assignor View
- Assignee View
- Add Assignment

**Joint payments** 

- View Joint Payment
- Add Joint Payment

**Direct Deposit**

- View Direct Deposit
- Add Direct Deposit
- Direct Deposit Waiver

**Customer Profile**

- Bankruptcy
- Other Debt Offsets
- Voluntary Withholdings
- Involuntary Withholdings

**Financial Services** ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXXX 9999 S

Welcome to Financial Services. Use the left navigation to begin.

After selecting a customer, the Joint Payment option is under the FSAFS Menu user may select “Add Joint Payment”. The following 2 options are available:

- **View Joint Payment**, to view a list of joint payments associated with a producer selected as the customer.
- **Add Joint Payment**, to create a joint payment from the joint payment.



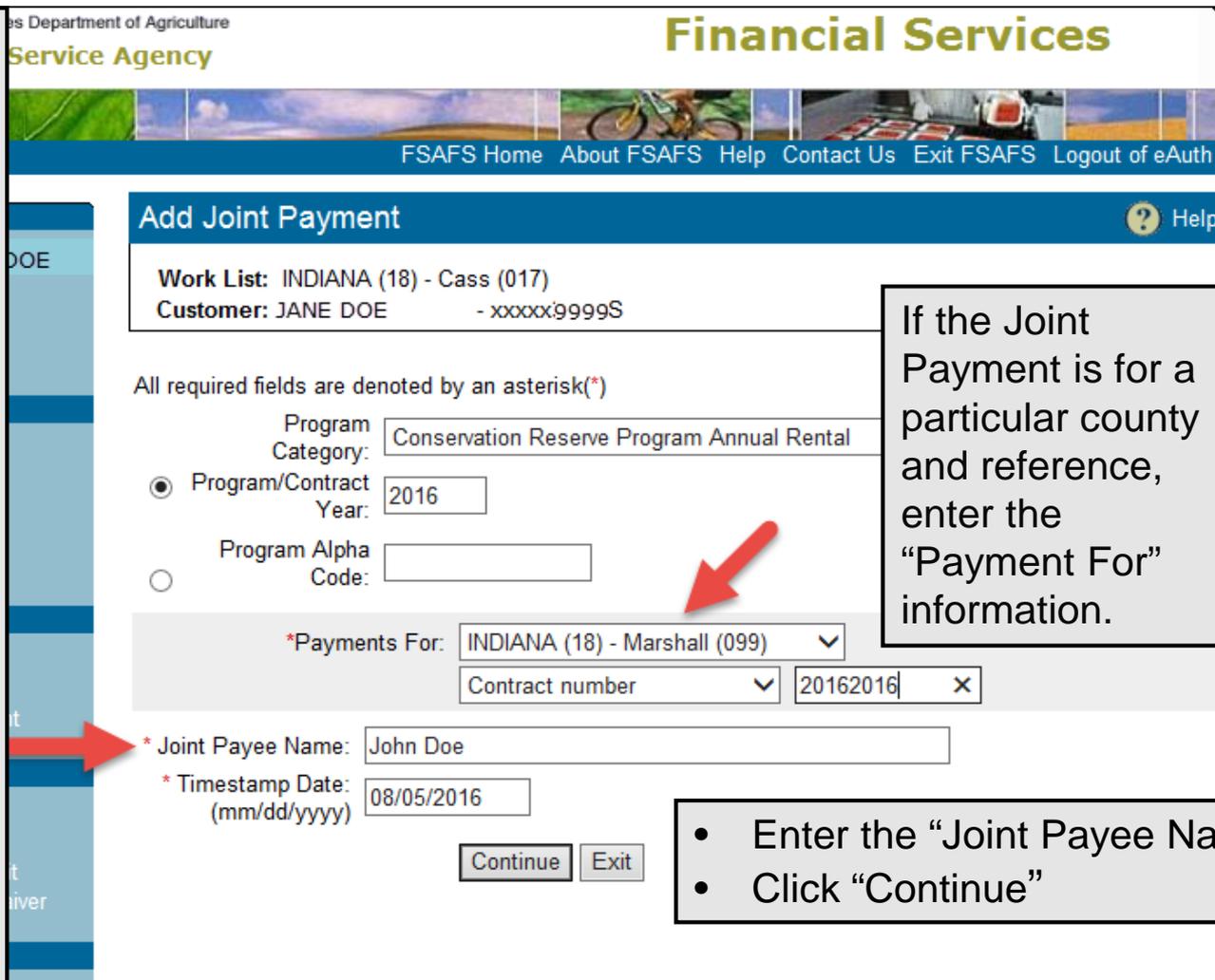
# Adding Joint Payment (Cont.)

- Select “Program Category”
- Select the Program Category from the dropdown menu and enter the Program/Contract Year.

**Note:** For multi-year CRP contracts enter the contract year.

Or

- If the program is not listed in the Program Category dropdown box, Click Program Alpha Code and enter the alpha program code used for the program.



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## Financial Services

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### Add Joint Payment Help

Work List: INDIANA (18) - Cass (017)  
Customer: JANE DOE - xxxxx'9999S

All required fields are denoted by an asterisk(\*)

Program Category: Conservation Reserve Program Annual Rental

Program/Contract Year: 2016

Program Alpha Code:

\*Payments For: INDIANA (18) - Marshall (099)

Contract number: 20162016

\* Joint Payee Name: John Doe

\* Timestamp Date: 08/05/2016

If the Joint Payment is for a particular county and reference, enter the “Payment For” information.

- Enter the “Joint Payee Name”
- Click “Continue”

# Adding Joint Payment (Cont.)



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**Joint payments**

- ▶ View Joint Payment
- ▶ Add Joint Payment

**Add Joint Payment** ? Help

**Work List:** MISSOURI (29) - Callaway (027)  
**Customer:** MARY SCHOOMAKER XXXXX - 0001 S

**Program Category:** Milk Income Loss Contract Program (2010)

**Payments For:** MISSOURI (29) - Callaway (027)  
 Contract number 859877

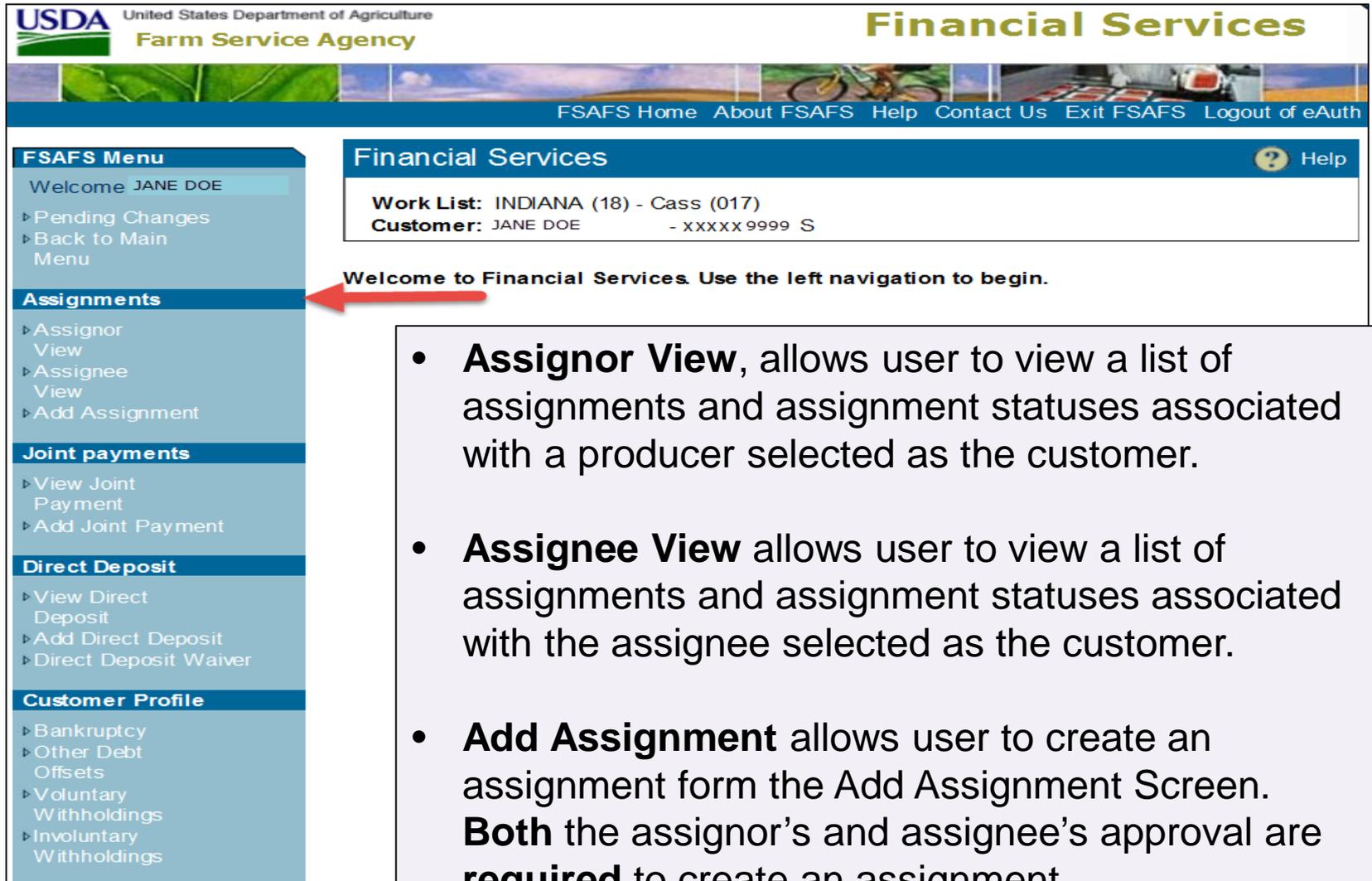
**Joint Payee Name:** STEVE MUREY  
**Timestamp Date (mm/dd/yyyy):** 06/10/2010

- **Confirmation Add Joint Payment**, add process will be completed and transaction will be placed on the appropriate work list for the secondary approval process.
- **Back** Add Joint Payment Screen will be redisplayed so users can update request information.
- **Exit Joint Payment** work List will be redisplayed and the joint payment will not be created.

# Assignments

- Assignments are the transfer of right to receive a payment from an assignor to an assignee. Only program benefits applicable to FSA or CCC that are eligible for assignment will be allowed. This action will instruct FSA to make payment for a specified amount to the assignee.
- With an assignment, a direct deposit or paper check is made payable to the assignee.
- If the participant has program payments in more than one county, an assignment can be created for program payments resulting from:
  - All counties that the producer participates in
  - Payments in a specific county
  - A specific payment in a specific county
- Terms Used:
  - Assignor – Customer who earned the FSA/CCC payment.
  - Assignee - Party that the payment(s) will go to.

# Adding Assignment



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**Financial Services** ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - XXXXX 9999 S

Welcome to Financial Services. Use the left navigation to begin.

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**Direct Deposit**

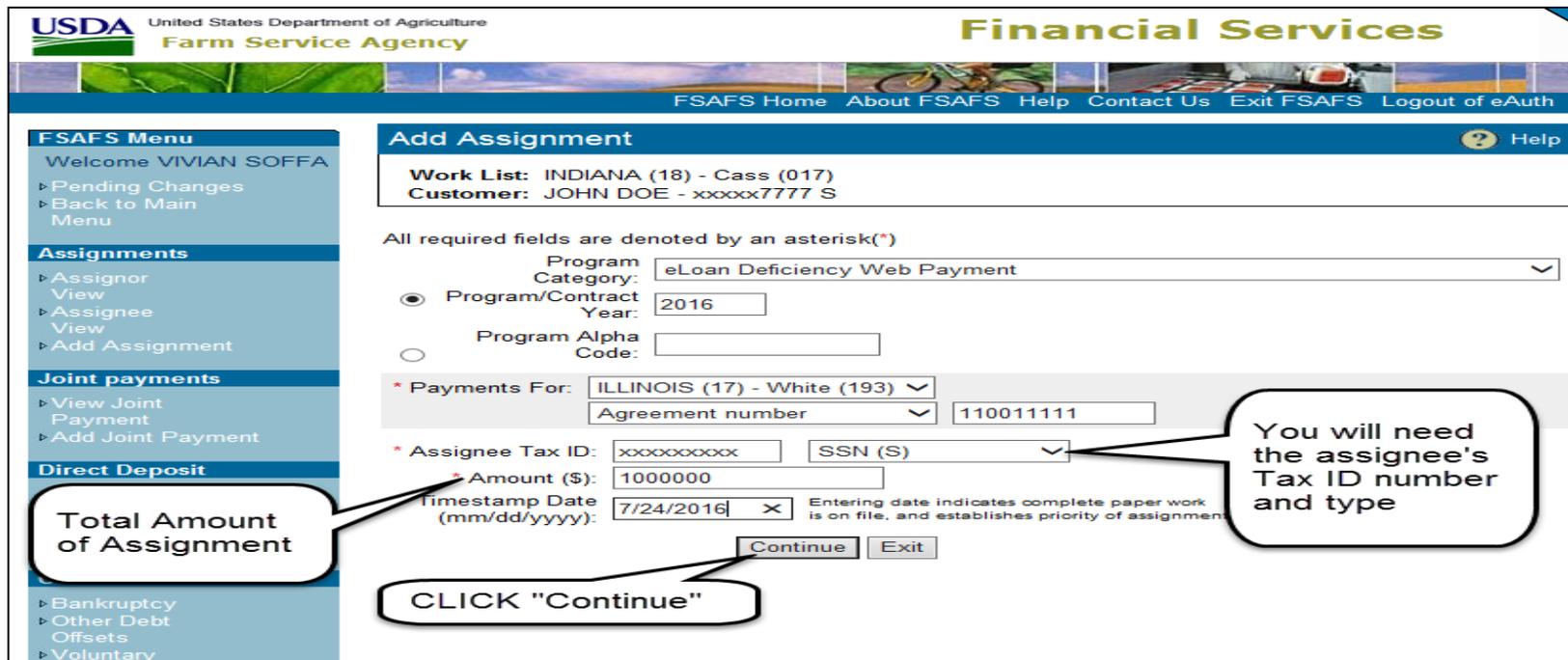
- ▶ View Direct Deposit
- ▶ Add Direct Deposit
- ▶ Direct Deposit Waiver

**Customer Profile**

- ▶ Bankruptcy
- ▶ Other Debt Offsets
- ▶ Voluntary Withholdings
- ▶ Involuntary Withholdings

- **Assignor View**, allows user to view a list of assignments and assignment statuses associated with a producer selected as the customer.
- **Assignee View** allows user to view a list of assignments and assignment statuses associated with the assignee selected as the customer.
- **Add Assignment** allows user to create an assignment form the Add Assignment Screen. **Both** the assignor's and assignee's approval are **required** to create an assignment.

# Adding Assignment (Cont.)



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**Direct Deposit**  
▶ Bankruptcy  
▶ Other Debt Offsets  
▶ Voluntary

**Add Assignment** ? Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JOHN DOE - xxxxx7777 S

All required fields are denoted by an asterisk(\*)

Program Category:

Program/Contract Year:

Program Alpha Code:

\* Payments For:   
Agreement number:

\* Assignee Tax ID:

\* Amount (\$):   
Timestamp Date (mm/dd/yyyy):   Entering date indicates complete paper work is on file, and establishes priority of assignment.

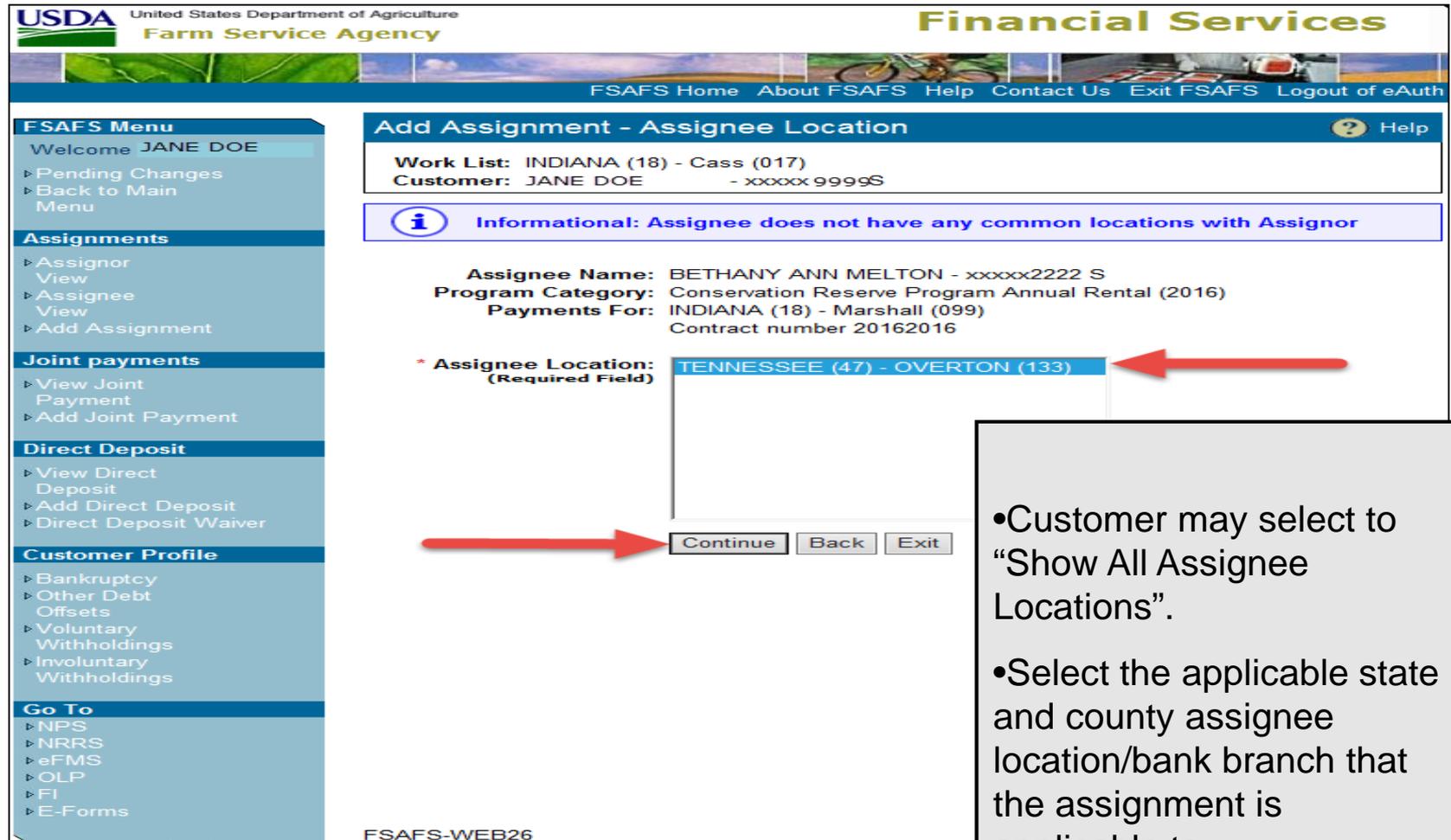
**Total Amount of Assignment**

**CLICK "Continue"**

**You will need the assignee's Tax ID number and type**

- This is an example of an assignment by category for a specific program payment in a specific county.
- Select the "Program Category" radio button. Select the applicable program from the drop down box. Enter the "Contract Year" of the applicable contract. Select the applicable State/County. Select the reference, which would be "Contract Number" for this program and enter the applicable number. Enter the "Assignee Tax ID" and ID Type. Enter the amount of the assignment.

# Adding Assignment (Cont.)



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**Add Assignment - Assignee Location** Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - xxxxx 9999S

**Informational:** Assignee does not have any common locations with Assignor

**Assignee Name:** BETHANY ANN MELTON - xxxxx2222 S  
**Program Category:** Conservation Reserve Program Annual Rental (2016)  
**Payments For:** INDIANA (18) - Marshall (099)  
 Contract number 20162016

\* **Assignee Location:** (Required Field) **TENNESSEE (47) - OVERTON (133)**

**Continue** **Back** **Exit**

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- Customer may select to “Show All Assignee Locations”.
- Select the applicable state and county assignee location/bank branch that the assignment is applicable to.
- Click “Add Assignment”



# Adding Assignment (Cont.)



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Add Assignment - Assignee Location
Help

**Work List:** INDIANA (18) - Cass (017)  
**Customer:** JANE DOE - xxxxx0999 S

i Informational: Assignee does not have any common locations with Assignor

**Assignee Name:** JOHN VANDOE - xxxxx1234S  
**Program Category:** eLoan Deficiency Web Payment (2016)  
**Payments For:** ILLINOIS (17) - White (193)  
 Agreement number 11011111

**\* Assignee Location: (Required Field)**
TENNESSEE (47) - OVERTON (133)

Add Assignment
Back
Exit

- Customer may select to "Show All Assignee Locations".
- Select the applicable state and county assignee location/bank branch that the assignment is applicable to.
- Click "Add Assignment"

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# Assignments: Multi-Year Payments

This is an example of a multi-year CRP Annual Rental Payment.

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**Add Assignment**

Work List: INDIANA (18) - Cass (017)  
Customer: JANE DOE - xxxxx9999S

All required fields are denoted by an asterisk(\*)

Program Category: Conservation Reserve Program Annual Rental

Program/Contract Year: 2016

Program Alpha Code:

\* Payments For: INDIANA (18) - Marshall (099)  
Control number: 20162016

\* Assignee Tax ID: XXXXXXXXX SSN (S)

\* Amount (\$): 200000

Timestamp Date (mm/dd/yyyy): 08/05/2016

Entering date indicates complete paper is on file, and establishes priority of assignment.

Continue Exit

Click "Continue"

Note: Program Year is the year of CRP Contract.

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# Assignments: Multi-Year Payments (Cont.)

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▶ View Direct Deposit  
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▶ Direct Deposit Waiver

### Add Assignment - Multi Year Allocation

Work List: INDIANA (18) - Cass (017)  
Customer: JANE DOE - xxxxx 9999S

Assignee Name: JON DOE I - xxxxx2222 S  
Assignee Location: TENNESSEE (47) - OVERTON (133)  
Program Category: Conservation Reserve Program Annual Rental (2  
Payments For: INDIANA (18) - Marshall (099)  
Contract number 20162016

Year	Amount	Year	Amount
2016:	<input type="text" value="1500"/>	2024:	<input type="text" value="1500"/>
2017:	<input type="text" value="1500"/>	2025:	<input type="text" value="1500"/>
2018:	<input type="text" value="1500"/>	2026:	<input type="text" value="1500"/>
2019:	<input type="text" value="1500"/>	2027:	<input type="text" value="1500"/>
2020:	<input type="text" value="1500"/>	2028:	<input type="text" value="1500"/>
2021:	<input type="text" value="1500"/>	2029:	<input type="text" value="500"/>
2022:	<input type="text" value="1500"/>	2030:	<input type="text" value="0.00"/>
2023:	<input type="text" value="1500"/>		

Assignment Amount (\$): 20000.00  
Remaining Amount (\$): 0.00

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Enter the amount to be paid to assignee for each payment year

Click "Calculate" to verify that the amount entered equal Assignment.  
Click "Add Assignment".

When the assignment has been added by the assignor, the assignee will log into Financial Services with their level 2eAuth and accept the Assignment.