

United States Department of Agriculture



FSA Box + OneSpan USER GUIDE

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Abstract

This document contains step-by-step guides to setting up Box + OneSpan and sharing documents with producers.

For internal FSA use only. Not for distribution.

Italicized text indicates updated content.

V8 Contains OneSpan Profile updates to Title, Company, and Access Delegates, In-Person eSigning Transaction Type, Universal Email Address; Box PDF Naming Convention, Program Folder Structure for Electronic Files.

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Introduction to the Guide

This document offers a high-level introduction to using Box and OneSpan for sharing documents with producers.

Box is a file-sharing platform that allows producers to upload files directly to the platform via their browser, without having to download any software. Box is not intended to be used as a long-term file storage platform, so documents should be moved to their final storage locations and deleted from Box once the transaction with a producer is completed.

High level view of the various steps for using Box:

- Producers' Box account/folder(s) are initiated by a service center employee
- Producers will receive an invite, via e-mail, from Box to gain access to their folders
- Producers will then be able to view documents awaiting their action
- Producers can download the document(s) from Box, print the document(s), sign, scan and upload back to Box to ensure secure document sharing
- A second option is that producers can download, print, sign and return via US postal mail to their service center
- A producer Box account is not required to use OneSpan.
- Producers can digitally sign document(s) with OneSpan through an email sent by a service center employee.

IMPORTANT INFORMATION

- Producer documents MUST be uploaded within an individual producer folder that is inside either the main *Farm Loan Program* or *Farm Program* folder. Due to Box's folder permissions structure, you should not upload an individual producers' documents directly to the main *Farm Loan Program* or *Farm Program* folders. Otherwise, uploading a file to either the main *Farm Loan Program* or *Farm Program* or *Farm Program* folders.
- Similarly, permissions to producers should be granted to the individual's folder only— **NOT** the main *Farm Loan Program* or *Farm Program* folders. This is because granting access to the main folder will grant that producer access to **EVERY OTHER** producer folder within the main folder.
- Once documents are signed/returned through Box they must be removed when **physically** stored or moved into the "Program Files for Upload into DRMS" folder within the appropriate Farm Program or Farm Loan Program Folder when **digitally** stored. Box is not intended to be used as a long-term document storage solution.

2. Getting Started with Box + OneSpan

- This section contains instructions on how to get started with your FSA Box + OneSpan license. You will need a computer, access to your government email, and either your PIV Card or your eAuth credentials. If you do not have access to Box + OneSpan, please contact your State POC to request access.
- As a first step, please review the below videos in order. Then, please proceed to review the associated materials in this Guide to learn more.
 - 1. FSA New OneSpan User Interface Employee Demonstration: <u>Adding a Single Signer</u> to a Document
 - 2. FSA New OneSpan User Interface Employee Demonstration: <u>Adding Multiple</u> <u>Signers to a Document</u>
 - 3. FSA New OneSpan User Interface Employee Demonstration: <u>Sending Multiple</u> <u>Documents to a Signer</u>
 - 4. FSA OneSpan for Client Demo: Signing from a Smart Phone
 - 5. FSA New OneSpan User Interface Employee Demonstration: <u>Receiving Documents</u> <u>from a Producer</u>
 - **NOTE**: To access a full list of videos and user guides, please go to the <u>MyFPAC Box +</u> <u>OneSpan</u> page. You will find a more current list of videos and Q&A's.
 - All Box + OneSpan **questions** received from current or new producers must be answered by FSA county office staff. If the FSA county office employee does not know the answer, please contact the State Assigned Point of Contact for assistance.

2.1 Logging into Box + OneSpan for The First Time

Most users will not receive an email after their initial access to Box + OneSpan has been granted by HQ.

1. **New Users** must <u>Click Here</u> OR right click and select "Copy link address" then paste into Chrome browser to activate their "**Send with OneSpan Sign FedRAMP**" account.

Note: You may see the Project Hosts SSO Service Page after clicking the link, please *wait for it to continue to load* until you see the OneSpan Dashboard. You may need to select "Active Directory" from a list to proceed.

(see next page for continued instructions)

- 2. Maintaining **Personal Information** on your OneSpan Account will allow packages to be customized to your transactions and delegated transactions. This is a one-time setup unless you change titles, locations, etc.
 - 1) CLICK on the profile image in the top right corner and select "My Account".
 - 2) **CLICK** on **"Personal Information**" from the left navigation bar if it is not already selected.
 - 3) **UPDATE** the "**Title**" field to an FSA Representative Approving Official.
 - a. **Examples of Approving Official:** County Executive Director or CED, Farm Loan Manager or FLM, District Director or DD, etc.
 - b. Examples of Approved Delegates Acting on behalf of an FSA Representative Approving Official: Acting CED, Acting FLM, etc.

NRCS Approving Official	E-SIGNED by Kirt Peterson
Signature:	on 08-08-22
USDA electronic signature; ma	nual signature not required.
	1.5.0 050
Date: 7/13/2020	Acting CED

Example of an Approved Delegate signing on behalf of an FSA Representative Approving Official.

- *4)* **UPDATE** the **"Company"** field to your office location using the following format:
 - a. County Office Employee: FSA Manitowoc County, WI
 - b. State Office Employee: FSA WI State Office
 - c. **National** Office Employee: FSA-OA Office of Management and Strategy; FSA-DAFLP....; FSA-DAFP....; FSA-DAFO....
- 5) **UPDATE** the **"Time Zone"** field to your county office location.
- 6) **CLICK "Save"**, then proceed to add a Delegate

OneSpanSign	Dashboard Transactions Templates Reports \lor Admin \lor			8°8 🚺 @
My Account	Personal Information			
PROFILE	First Name " Jane	Last Name " Farmer		
Personal Information 2	Trie 3	Company	4	
Password	Phone number	Timezone		
Signature	202-690-5221	(GMT-5:00) US/Eastern	0	
SETTINGS	Address			
Access Delegation	Address 1			
	Address 2			
	City		Country	
	Washington		United States	·
	State District of Columbia	Ŧ	Zip Code 20250	
	SAVE 6			

(see next page for continued instructions)

3. **Update** the ability for others to access your OneSpan Sign account while you're away from the office by selecting "Access Delegation" on the SETTINGS tab, add one or more delegates. CLICK Save, then immediately close the browser.

OneSpan <i>ßign</i>	Dashboard Transactions Templates Reports \lor Admin \lor	1 🗵
My Account 2	Access Delegation	
PROFILE		
Personal Information		4 ADD DELEGATE
Password	Search by name/email Q 🗎 DELETE	Send copy of all emails to delegates
Signature	There are no delegates that match the search criteria.	
SETTINGS		
Access Delegation	3	

IMPORTANT: Please follow agency policy for signature authority and signing on behalf of other employees.

4. To log in to Box + OneSpan for the first time,

from a Chrome browser enter the following URL <u>https://nrcs.account.box.com/login</u>. This will be the link to also access Box + OneSpan for every subsequent time you visit, so please add it to your Bookmarks or Favorites.

OR

visit the FSA Applications page and select "BOX Login" from the list of available applications.

Note: You may need to open a Chrome browser to copy and paste the URL from the FSA Applications page link if your default browser is set to Internet Explorer (IE).

(see next page for continued instructions)

5. Select Continue from the Box main login page - USDA Employees Only - with an FSA Box User Role assigned.

Note: Employees will enter Box via Level 2 eAuthentication. If you are prompted to enter a Box password, you are entering the wrong URL, *or* you do not have a government Box license account assigned to you and should contact your State Assigned Point of Contact for Box + OneSpan.

USDA		🕤 English (US) 🗸 🛛 Sig	gn Up
	Part of FPAC Bo	x Environment?	
	FPAC Box Environment uses your network credentials to login to Box. Continue to login to Box through your network.	If you are not a part of FPAC Box Environment, continue to log in with your Box.com account.	
	Continue	Not a part of FPAC Box Environment	
1.1	Walcome to LISDA EDAC Day		
	ATTENTION: Do NOT use the Sign Up link above to request y state office. Only a limited number of licenses were provided r request access.	our official FPAC Box account. Licenses are managed at the to each state. Please work through your State BOX POC to	
	FPAC users with a managed account may login here to store, s	hare, and access files online.	

IMPORTANT: Producers **DO NOT** Select "Continue". If the producer selects "Continue", the USDA Employees only option, they will enter their personal Box login and password and will receive the "Application Access Denied" from the eAuthentication account manager.

(see next page for continued instructions)

6. Click "Log In with PIV/CAC" and enter your PIV card pin or select "Log In with Password" to enter your Level 2 eAuthentication credentials.

Reminder: Employees will enter Box via Level 2 eAuthentication. If you are prompted to enter a Box password, you are entering the wrong URL, **or** you do not have a government Box license account assigned to you and should contact your State Assigned Point of Contact for Box + OneSpan.



7. For any subsequent visits, employees can access Box at the following URL: <u>https://nrcs.account.box.com/login</u> or the "Box Login" link can be found on the FSA Applications Page. Box can be accessed on any computer using your eAuth login. It can be accessed using your Linc Pass at the office, on a USDA computer from home, or when using the Citrix environment.

3. Managing Your Office's Box Folder Structure

This section shows how to create and manage a folder structure for each of the county offices that you are responsible for. Creating an office's folder and creating the FP and FLP folders within it are one-time tasks.

3.1 Creating Your Office(s)'s Folder Structure

1. Click the **New** menu on the right-hand side and then click the **Folder** option. You will need to create 2 folders (one for Farm Programs and one for Farm Loan Programs) for each county.

box		Q. Search Files and Folders	= -		0	E		DA GS
🖿 All Files		All Files -					Upload -	New -
Recents		Name	Updated ~	Size			Folder	
Synced							Bookmark	
≓∕ Notes	¢						Box Note	olate
🗑 Trash		Washington, DC - FP	Jul 16, 2020 by Gina Smith	9 Files			Word Document	
My Collections	¢	Washington, DC - FLP	Jul 16, 2020 by Gina Smith	2 Files			PowerPoint Present	ation
Favorites	0						Excerspreadsheet	

- *Note*: The creator of a folder will be its owner. Farm Program and Farm Loan Program folders should be created by someone in their respective area (i.e., the Farm Loan Program folder should be created by someone from Farm Loan Programs).
- *Note*: In future steps, you will create folders for each individual you are sharing files with. It is critical to keep the folder structure as simple as possible to prevent accidental exposure of PII to any other Box users.
- 2. Enter a **folder name** to represent your uploads.
 - a. *Example*: "Johnson County, MI FP" or "Johnson County, MI FLP"

Note: Maintain naming consistency and clarity while naming folders. For example, do not name one folder "FSA - Farm Program" and the other "FLP".

Note: NRCS also uses Box for sharing files with customers. These are separate from FSA and there should be no overlap between the FSA and NRCS folders.

 Invite appropriate employees to this folder by entering their email address into the Invite Additional People dialog box. Invite all employees who manage/review documents for signature into this folder.

(see next page for continued instructions)

- 4. Assign the permission level of **Co-owner** for all employee users responsible for the document flow. Permissions need to be assigned for each person who has access to the folder.
 - a. <u>IMPORTANT</u>: Assign all PTs who work on Farm Programs documents to the Farm Program folder, all PTs and FLOs who work on Farm Loan Program documents to the Farm Loan Programs folder, and all PT's who work in both areas to both folders.
 - *Note:* Employees who have not yet set up their Box accounts can still be added as editors, however, they will not have access to the folder or Box until they set up their account. The invite you send will be awaiting them once they set up their Box account.
- 5. Select the **Create** button when steps 2-4 have been completed.

	der	
Folder Name		
Johnson, KS - FP		
Invite Additional Pe	eople 🗕 🚽	
program.technician@usda.gov	x program.technician@usda.gow	CED@usda.gov 🗙
Permission +	_	
Co-owner	- O Learn M	lore

- *Note*: Employees added to this folder will have access to information in this folder AND any folder that is nested within it. They will NOT have access to any folder that has been created *above* this folder.
- 6. Ensure that both a Farm Programs and Farm Loan Programs folder is created for your county by following steps 1-5 above. If you do not work in that area (e.g. a FLM that does not work with Farm Programs), then ask someone in that area to create that folder.

3.2 Adding User Permissions After a Folder has Been Created

1. If an additional employee user needs to be added after the folder has been created, navigate to the folder you wish to add a user to and click **Share**.

Washington, DC - FP	Jul 16, 2020 by Gina Smith	9 Files
Washington, DC - FLP	Jul 16, 2020 by Gina Smith	2 Fil Ø Share

 Enter one or more employee email addresses in the Invite People box, Update the Permission to "Invite as Co-owner", then type an optional message and click Send. Employees should be added if they were not originally included when the folder was first set up but now need access to send or receive files.

ut 💦 joł	n.smith@usda.gov	×	
nvite as (o-owner 👻		
Message	(optional)		
Add a m	essage		

Note: Available options to Invite People: Owner, Co-owner, Editor, Viewer Uploader, Previewer Uploader, Viewer, Previewer, and Uploader.

3. The employee(s) will **receive an email** at the address entered inviting them to use the folder.

(see next page for continued instructions)

4. Recently added employee(s) can click **Go to Folder** and it will take the added employee directly to the Box folder they were added to. A warning message may appear in the email message. Click on "Looks Safe" to continue.

\$ box
Gina Smith wants to work with you on Washington, DC - FLP
Washington, DC - FLP
"I'd like to share my files with you on Box."
Go to Folder

Note: This can also be employees from other counties and/or the virtual help center.

3.3 Transferring Folder Ownership after a Folder has Been Created

When the creator (owner) of a folder is planning to retire or moves to a different office or position, their current permissions should be adjusted and someone else upgraded with their former permissions.

Note: If you are unable to transfer or move a folder because you are not the owner and the owner is no longer an FSA employee, Please contact the ServiceNow Service Desk by submitting a ticket through the FPACNOW Portal. This must be accomplished within 90 days of separation from the agency.

- Locate the appropriate file. Click the Collaboration Icon to the right of the file name. Alternatively, you can open the More Options menu and select Manage Collaborators.
- 2. Find the collaborator whose access level you would like to modify. You can search by name using the **Filter Collaborators** search box in the upper right.

(see next page for continued instructions)

3. Under the **Permissions** column, click the user's access level to modify it. Select the appropriate access level from the dropdown that appears. If the access level is greyed out, you may not have the necessary permissions to modify that user's access level.

Permissions	Date Added	Added To
Owner	May 6, 2020	Washington, DC - FLP
Co-owner -	Aug 17, 2020	Washington, DC - FLP
Owner Co-owner Editor Viewer Uploader Previewer Uploader Viewer Previewer Uploader Remove		

- 4. As the owner of the folder, adjust the permissions for the selected individual by clicking the blue arrow next to their current permission level. Click their new permission or click **Remove** to remove access to this folder for this person.
 - If you are the owner of a folder that may be retiring or moving to another office, you can transfer folder ownership to a collaborator at any time. Simply follow the instructions above and select **Owner** from the Permissions level dropdown (this option is only visible to folder owners). The collaborator you designate will be the new "Owner" of the folder and your access level will be downgraded to "Editor".
 - If you are transferring a private (<u>yellow</u>) folder, you will first need to invite the user to the folder before you can you transfer ownership. For larger transfers, we recommend doing this at the end of the day, so users are not disrupted by the move.
 - If you move a folder you own into a folder someone else owns, the ownership of the moved folder also moves -- from the original owner (in this, case, you) to the person who owns the folder into which you moved your content. For example, if you own Folder A, and you move Folder A into Folder B, the person who owns Folder B becomes the new owner of Folder A.

4. Creating and Managing Your Producers Box Folder Structure

4.1 Creating Individual Producer Folders

Creating individual producer folders should be completed at the county office level by the employee managing the signature transactions. These folders will be created so a field office employee can share documents with producers.

- 1. Once logged into Box, open the folder you want to create the producer folder in.
 - Example: "Johnson County, MI FP" or "Johnson County, MI FLP"
- 2. Before creating a new folder for a producer, check to see if a folder has already been created for that producer. This can be done in one of two ways:
 - a. <u>Sort the producer folders alphabetically</u> by clicking the **arrow** next to the **Name** field on the main folder page so it is pointing up and look for that producer in the list.



b. You can also <u>Search for the producer folder</u> to ensure it is not already created for the producer. Type the name of the individual at the top of the screen. It can be a complete name (e.g. "Nathan Sellers") or a partial name (e.g. "Sell"). Make sure to check the "Only Search inside of [folder name]" box to prevent duplicate information or confusion if another office has documents for the same participant to sign.

Content Filters	Metadata	
File Type(s)		
Any Type		•
Date Updated		
Any Time		•
Owners		
Enter a set of names or en	mail addresses	
Only search inside of "	ohnson County - FP"	

(see next page for continued instructions)

- *Note*: If you see that the folder is already created, *do not* create a secondary folder for the same producer.
- 3. Once you have ensured that the producer folder does not already exist, create one folder for the producer within the Farm Program or Farm Loan Program folder that the producer is associated with. Click **New** and choose **Folder**.



4. Enter the Folder Name and the producer's email address (Optional), change the permission level to "**Viewer Uploader**", then click **Create**. DO NOT invite Producers without their prior knowledge. Producers will be notified immediately by email they have been invited to the folder.

IMPORTANT: It is **not** necessary to enter a producer's email address in the "Invite Additional People" when creating a new folder if they are only going to sign documents using OneSpan. Box is intended to share files and documents securely requiring a pen and ink original signature. *It can also be used to share maps, production evidence, etc.*

- a. <u>Folder Name</u>: It is suggested to simply use the producer's name for the folder name. This would be the individual's name with last name listed first, then the first name, then a middle initial or name if needed. • *Example* – "Farmer, Jane" for an individual.
- b. <u>Email Notifications</u>: Make sure to verify with the producer that the email address is the one they want to use.
- c. <u>Permission Level</u>: The permission level of "Viewer Uploader" should be used for producers. This role for producers will help prevent accidental deletion of documents but still allow each producer to view/upload/download documents. For information on updating/removing permissions, see <u>Section 3.3</u>.

(see next page for screenshot and continued instructions)

Create a New Folder	×
Folder Name	
Farmer, Jane J	
Invite People	Shared with GS
Enter email addresses to in	wite users
Permission	
Editor	- Learn More
	Cancel Create

Note: No additional sub-folders should be created beyond this point to prevent accidental exposure of PII.

Note: For advanced permission levels and capabilities please navigate to: <u>https://support.box.com/hc/en-us/articles/360044196413-Understanding-CollaboratorPermission-Levels</u>

4.2 Creating Program Level Electronic File Folders

Creating program level electronic file folders (digital file cabinet) in-place of paper folders must be managed at the county office level by the employees uploading the signature transactions and supporting documentation into the Digital Records Management System (DRMS). DRMS is scheduled to be released the Spring of 2023.

NOTE: Additional information for the Digital Records Management Program can be found at the following url: <u>https://myfpac.usda.gov/special-topics/digital-records/index.html</u>

1. **Select** the appropriate **county folder** ("Johnson County, MI – FP" or "Johnson County, MI – FLP") you wish to create your electronic program level file folder.



(see next page for continued instructions)

2. Create a subfolder titled "Program Files for Upload into DRMS"



3. **Create** a sub folder for the program files you plan on storing temporarily in Box until the DRMS application is available for upload. Please follow Handbook 32-AS, paragraph 87.

box		Q Search Files and Fold	lers 📑 👻
🖿 All Files		All Files > Brown	County, SD - FP > Program Files for Upload into DRMS
Recents		NAME 个	UPDATED
Synced			Today by Gina Smith
<i>⊒∕</i> Notes	⊕	ARCTEC	Today by Gina Sinici
<u>لان</u> Sign		ERP	Today by Gina Smith
🌾 Relay		HELC-WC	Today by Gina Smith
Apps			

NOTE: The main purpose of the folder structure is to be able to assign the appropriate File Code to the records. If you have that information stored on the PDF Naming Convention or the Folder, either option will be acceptable.

(see next page for continued instructions)

4. Create a subfolder for files that have different File Codes established according to 32-AS Supplement. At this level you can create a program year folder and then copy the list of File Code folders into each one. You can also leave everything in the subfolder and sort out by program year and/or file code based on the pdf naming convention established. There are multiple ways to save the records making sure you can find them. Conder this your Digital File Cabinet.



Complete! You have now created a "Digital File Cabinet to store electronic records.

4.3 Upload a File to a Producer Folder

While browsing all files and folders in Box, uploading a new file or folder is straightforward.

- 1. Click the **Upload** button in the upper-right corner.
- 2. Select **File** or Folders, depending on what you'd like to upload. **Note**: Folder uploads on IE 11 are not officially supported. Chrome is the recommended browser.
- 3. To maintain the National Archives and Records Administration (NARA) required metadata for the electronic records uploaded into DRMS, a recommended PDF Naming Convention for documents uploaded into Box has been identified. Previously Box has been considered a temporary storage system and records were not intended to be stored long term. Now they can be kept in Box for a longer period if the intent is to save the record(s) for upload into DRMS once it is available. Record(s) must be stored in Box in the appropriate Program Level Electronic File Folder (See Section 4.2).

(see next page for continued instructions)

EXAMPLE:

PDF Naming Convention: UploadingOffice-CustomerName-ObjectType-Program-ProgramYear-UniqueID-FolderID-CreationDate-DispostionDate.pdf

PDF Naming Sample: 55071-Farmer-Jane-Kay-AD-1026-HELCWC-2022-F2500-Creation-20220510-Disposition-20231001.pdf

IMPORTANT: Each piece of metadata **MUST** be separated by a **HYPHEN**. No spaces or underscore allowed.

Defined Metadata Fields

Any of the defined metadata fields listed below can be included in the naming convention.

a **Uploading Office** is needed to identify where the record will be uploaded into DRMS. Ideally, this should be the service center that administers and/or has the documents either paper or electronic being uploaded. It is required.

Examples: 55071 or WI-071 or WI-Manitowoc or WI-STO or WI-State-Office

b **Customer Name** is the combination of the producers Last Name, First Name, middle or the Entity Name. It is required.

Examples: Farmer-Jane-Kay or CJ-Farmer-Inc or Farmer-James-Dean-Jr or Smith-Farms-Inc

c **Object Type** is either the Form Name (i.e. AD-1026, CCC-509, etc.) or Supplemental Documentation. It is required.

Examples: AD-1026 or CCC-509 or Supplemental-Documentation

d **Program** can be either full program name and/or the acronym established. It is required.

Examples: Emergency-Relief-Program-Phase-I or ERP-Phase-I or Conservation-Reserve-Program or CRP

e **Program Year** is the year in which the record was created. This can also be fiscal year, calendar year, etc. It is either **4 digits (YYYY)** or year, month, day (**YYYYMMDD**), whichever appropriately identifies the record. It is required.

Examples: 2023 or 20231207

(see next page for continued instructions)

f **Unique ID** is the identifier for the case number, contract number, loan number, application number, farm number, etc. Basically, whatever number you would use to search and find the record. It is optional.

Examples: Application-551 or F2500 or T1629 or Contract-25B

- g **Folder ID** is used to enter any specific information you would use to search and find the record. This field was used as part of the scanning pilot to capture the information from the paper file folder. It may include the producer's name, project name or other identifier that maintains the records as a unit pertaining to the same function or activity. It is required.
- h **Folder Tab** corresponds to the section or position in the folder in accordance with agency policy. Folder tabs are used to subdivide like materials. This field was used as part of the pilot to capture the information off the paper file folder. It is optional.

Examples: Position-1 or Position-2 or Contract or Maps or Payments

i *File Code(s)* are found in 32-AS Supplement "FSA File Maintenance and Disposition Manual" on the FSA Intranet Handbooks page. The following link will be displayed after opening the document:

https://usdagcc.sharepoint.com/sites/FBC-RecMS-Public/rmlibrary/Forms/AllItems.aspx?viewid=3b2191ba%2De94e%2D491a%2D96 95%2D4a6ce5b7e7ac&id=%2Fsites%2FFBC%2DRecMS%2DPublic%2Frmlibrary %2F32%2DAS%20Supplement%20%2D%20FSA%20File%20Maintenance%20Dis position%20Manual

The FPAC Records Management SharePoint site page will provide a list of documents. Make sure you open the newest version, then search the supplement for your specific program and identify the File Code. It is optional.

Examples: CRP-1-e-1 or FLPF-1 or FSFL-1

NOTE: The File Code can be added to the electronic Program File Folder in Box where the document is being uploaded. If so, there is no need to at it to the pdf naming convention.

j **Record Creation Date** is the date the file met the definition of a federal record. Generally, this is the date the record was initially created, received, or captured. It is required.

Example: YYYYMMDD

(see next page for continued instructions)

k **Disposition Date** is the start date, or the trigger date as defined by the File Plan or Records Schedule. The trigger date is based on the record type and starts the record retention period. For example, it can be based on a cutoff date (i.e. end of FY) or a particular action (i.e. case closed date). It is optional.

Example: YYYYMMDD

1 **Physical State** is the state or territory that corresponds to the physical location of the property. It is optional.

Examples: 55 or WI or Wisconsin

m **Physical County** is the county that corresponds to the physical location of the property. It is optional.

Examples: 071 or Manitowoc

- n **Coverage** the geographic scope of the record content. For example, this could be geographic coordinates, plot numbers, etc. It is optional.
- 4. Select the file(s) or folder you'd like to upload. You can select multiple files for upload by holding the **Command** or **Control key** while selecting files. However, you can only select one folder at a time for upload.
- 5. Click **Open** or **Upload**. Producers added to the folder as a collaborator will be notified immediately by email when documents are uploaded. (For a step-by-step from the producer's perspective, see <u>Section 5.1</u>)
- **Note**: Please make sure the file name is descriptive and appropriate for sharing with the producer. For example, if it is a scanned document consider renaming it to the type of form it is and add the producers name to the file name. For example, "2020 Acreage Reporting Farmer, Jane J".

All Files > Washington, DC - FLP > Farmer, Jane		🗊 🔽	oad • New • 🖉 Share
Name	Updated ~	Size File	Sharing Details
AD-2047 Customer Data Worksheet Request for Business Partner Record Change	Jul 16, 2020 by Gina Smith	2.1 MB	GS Gina Smith Owner
FSA-2001 Request for Direct Loan Assistance.pdf	Jul 16, 2020 by Gina Smith	585.6 KB	Gina Smith
			Shared Link Create Link
			G File Request Create Link

6. Box will show a notification when documents are successfully uploaded. To see the file in the folder, you may need to refresh the page.

(see next page for screenshot and continued instructions)



7. If you are unable to open the uploaded PDF document in Box, it is because the document is saved as a dynamic format, and it needs to be converted to a static format.



a. **Click** on the "**Print**" button, select "**Microsoft Print to PDF**" as the Printer: option, the Click "**Print**". Save the document in a folder and upload into Box or save the document in Box Drive to the previously created producer folder.

5. Producers Accessing Documents in Box

Each producer folder created within an FSA county FP or FLP folder; as well as an NRCS folder, will be visible to the producer when they access their personal Box account. NRCS folders will display the acronym "NRCS" next to their name to alleviate potential confusion.

5.1 Workflow for Producer Receiving Shared Documents

1. The producer receives and opens an email invite to Box after the employee adds them to their individual folder.

Note: If the producer indicates they did not receive the email invite from Box, have them check their spam folder.

2. They navigate to Box by clicking **Accept Invite** or **Go to Folder** in the email. The employee will receive a confirmation email once the producer as accepted the folder invite.

Note: Producers can also log in to Box on smartphones by downloading the Box app. See Section 5.2 for the Mobile Box Access Workflow.

"I'd like to share my files with you on Boy	r." – Jonathan Liss
	Sellers, Nathan Collaborated Folder Accept Invite
Get our an	n to view this on mobile

- a. If the producer does not have a Box account, they must register, at a minimum, a free Box account with the email address entered in the invite by the employee.
- b. The producer will be prompted to enter the following information:
 - Full name
 - Password and Password confirmation
 - Phone number (Optional)
- c. The producer will then accept the Terms of Service by clicking Submit.

(see next page for screenshot and continued instructions)

Signup for a Box account to accept invite	20 A	You're invited to collaborate	on:
Full Name			
Nathan Sellers	0	Sellers, Natha	n ss
Email Address			
n.sellers@gmail.com			
Password	Good		
Confirm Password			
Phone Number (optional)			
Submit			
		FPAC Box Env	vironment

3. The producer is taken to their individual Shared Folder location upon clicking Submit.

Note: On subsequent uses of Box by the same producer, they will not receive an automatic email when a document is uploaded to their folder. The employee should contact the producer separately to alert them they have uploaded the file for them.

- 4. The producer may perform the following actions granted via "Viewer/Uploader" permissions they were assigned:
 - a. View document (if a document has been uploaded already by an employee)
 - b. Download document to fill out, print, or sign (if either the producer or the employee has already uploaded a document to this folder)
 - c. Upload a signed document, production evidence, maps, etc.
- 5. In most instances, the producer will need to download the file. This is done by clicking on the **More Actions** option next to the file and selecting "**Download**".

(see next page for screenshot and continued instructions)

All Files > Johnson County MO FSA Office	Download all docu	ments	Upload • New • 🖉 Share
Name	Updated ~	Size	Sharing Details
AD-2047 Customer Data Worksheet Request for Business Partner Record Change.pdf 😰	May 19, 2020 by Gina Smith	2.1 MB	Share Collaborators Invite People
	— ,	Open with* & Share & Upload New Version & Download Trash @ Collections Move or Copy & Lock	Shared Link Create Link
		Properties More Actions integrations	

- 6. They will then need to perform the required task to the document, such as filling it out (either on the computer or after it is printed). They can also download the document to then print.
- 7. After the document is completed (either done electronically on the computer or rescanned after it is printed out), the producer should reupload the document to the folder. The instructions for uploading a document by the producer are the same steps as found in <u>Section 4.2</u>.
- 8. After a producer uploads a new file to the folder, the employee is not notified automatically via email. The producer should contact the employee to let them know the new document has been uploaded, or the employee can turn on alert settings shown in Step 12.
- 9. An employee can perform the following actions on the producer-uploaded document:

		•••
Updated $_{\vee}$	Size	:: >
Today by Teresa "personal email" Harrington	11.1 КВ •••	Share
Today by Kirt Peterson	Open with Microsoft Word (*) Share	
Today by Teresa "personal email" Harrington	<u> </u>	
	ۍ Download ☆ Add to Favorites	
	E Move or Copy	
	四 Start a workflow	
	More Actions Integrations	

(see next page for continued instructions)

- 10. The employee may eSign document via PIV by:
 - a. Downloading the document
 - b. Converting to Adobe
 - c. Using PIV card eSignature functionality
- 11. The employee uploads the signed document into the producer's folder.
- 12. The employee should alert the producer that the document has been uploaded since the default setting is no notifications will be provided. However, see the note below on how either the producer or employee can enable email alerts for new document uploads.

Note: Email notifications are disabled by default and will need to be enabled by default by a system Admin. However, individuals (employees and producers) can change their notification settings by clicking the 3 ellipses in the folder, then selecting "**Settings**".

(see next page for continued instructions)

	Ø ⊠ ♠	
1 📫 [···· 📝 New - Upload -	
Size ដ 🔪	Rename stails	
75.8 КВ		
53.5 KB	⊘ Classify ∂accentur	
11.7 KB	 ⑦ File Request ⑦ Trash 	
	Collaborators /pame2@	
2	段 Settings	
	Nathan Sellers Viewer Uploader	
	Share this Folder	
Email and Notifications		
Notifications	O Use my default notification settings	
Control the frequency and type of email updates generated from this folder.	Override default settings for this folder and all subfolders	3
	Disable all email notifications for all collaborators	
	Notify me when someone	
	Previews	
	Downloads	
	Uploads	
	Deletes	
	 Adds a comment 	

The "Email and Notification" settings are at the bottom of the page.

- 13. The producer chooses to download document and then prints, wet signs, and scans or takes a photograph of signed document to upload.
- 14. The producer then uploads the signed document back to the Box folder.
- 15. The employee receives an email notification of the new document submission (if email alerts are turned on) and reviews/re-files/stores it as directed by policy.
- 16. The employee must then delete the file from Box immediately. Box is not intended to be used as a long-term file storage platform, so documents should be moved to their final storage locations and deleted from Box once the transaction with a producer is completed.

5.2 Mobile Box Access Workflow

Producers with smartphones may find it convenient to upload pictures of scanned documents directly from their phone. To do this, they can access their Box account via the internet browser on their phone. It is not necessary to download the Box app. Producers can accept the invitation to Box via their mobile email inbox. After clicking Accept Invite, a Signup page appears for producers to enter their Full Name, password, and optional phone number. They will not be able to edit the email address associated with the account.

- 1. Once the producer taps **Submit**, a page appears prompting them to download the Box app. If they do not wish to download the app, they should click **View on Box Mobile Site**.
- 2. Producers can view, download, and upload documents via the Box mobile website:
 - a. <u>Viewing documents</u>: tap the document to open it
 - b. <u>Downloading documents to a</u> <u>smartphone</u>: tap the document to open it, click the downward arrow at the bottom of the screen, then click **Download**.



(continues next page)

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c. <u>Uploading documents</u> <u>from a smartphone</u>: tap the plus sign at the bottom of the screen, tap **Upload**, and select whether you want to take a picture or upload a file from elsewhere on your smartphone.



6. Example of Your Office's Box Folder Structures



Note: Box is **not** intended to be used as a long-term document storage. Instead, the purpose is to provide a simple and secure gateway between field offices and customers for the exchange of critical documents to maintain normal customer relations remotely. Documents should be removed from Box once they have been signed by all required parties. These documents should be stored in locations as directed by policy.

7. OneSpan – Send New Package

All employees are required to go through Box to get to OneSpan. Box allows USDA to protect a producers PII and allows all employees associated to the county folder to handle and track the progress of incoming documents. This is very effective for employees in-office or remote; as well as, out of office for any reason.

Reminder: Producers are **not required** to have a Box account set up to receive OneSpan emails for signature from a USDA employee.

- 7.1 Create a New Package for eSigning and In-Person eSigning.
- Hover over the uploaded file OR the producer file folder, Left Click the 'More Options' is button, Hover over the 'Integrations' options in the dropdown list and Left Click "Send with OneSpan Sign FedRAMP".
 - a. Example: Single Uploaded File selected within a producer file folder:



b. Example: Multiple Uploaded Files from the producer file folder:

All Files 🔰 🔯 Washington, DC - FLP			··· 📝 New • Upload
Name	Updated ~	Size	Sharing Details
Farmer, Jane	Today by Gina Smith		Share Collaborators Invite People
NBT Bank or Lenders Individual Name	Jul 8, 2020 by Gina Smith	Share Download	Shared Link Create Link
Smith, Gina G	May 6, 2020 by Gina Smith	Trash	G File Request Create Link
		Add to Favorites	Share this Folder
		File Request	·
		Settings	
		••• More Actions >	
	-	Dintegrations + 2. Se	nd with OneSpan Sign FedRAMP
		🐥 Se	nd with OneSpan Sign FedRAMP (Sandbox)
		Se	nd with OneSpan Sign US1

(see next page for continued instructions)

c. The selected file(s) will display as a "Draft" in a separate popup window. **Click** on the **maximize** button in the top right corner to begin adding recipients.

Note: There is a navigation bar at the bottom of the page; however, it is recommended to maximize the draft transaction.

☆ FSA-2001 Request for Dir	🕼 FSA-2001 Request for Direct Loan Assistance.pdf on OneSpan Sign US1 - powered by Box - Google Chrome – 🗆 🗙 Move or
Name	nrcs.app.box.com/services/esignive/4249/691928354978/81/198.8335teab98213aa9b811659658e3d60ee7/b4a5ede9570a99229 #c60b80abc/nod
AD-2047 Customer Data	SA-2001 Request for Direct Loan Assistan Draft 🔅 🖹 💿 🗾
FSA-2001 Request for D	$ \leftarrow \uparrow \rightarrow \perp \textcircled{Q} \bigcirc 1 \qquad \texttt{KB} \qquad @$
	This form is available electronically. FSA-2001 U.S. DEPARTMENT OF AGRICULTURE Position 3 ° (03.06.15) Farm Service Agency *
	REQUEST FOR DIRECT LOAN ASSISTANCE
	INSTRUCTIONS: FSA suggests applicants use the available corresponding instructions found on the internet at http://invut.com/kwm5rem.for the proper completion of this form. Assistance is also available from local FSA offices for any part of the application process. FSA can provide assistance in completing requested forms, explain what information is necessary, ant, answer any questions regarding the application process.
	Farm Loan Teams located at USDA Service Centers or FSA County Offices are responsible for all direct loan applications. You can find the address and telephone number of the nearest Farm Loan Team serving the County where you plan to farm from the Internet at http://invuit.com/?syle38.
	The Federal Government requests race, ethnicity and gender information to monitor FSA's compliance with Federal laws prohibiting discrimination analist annicants. Annicants are encouraned to furnish this information. This information is not used to evaluate an
	Redolerts Accept Only Fields Courserts

Note: Selecting the Back Arrow to the left of the title on the transaction will allow you to add or edit receipients; as well as, *change the transaction default from eSigning to In-Person eSigning*.

d. **Click** on the "**Settings**" icon to update the Transactions Settings for the individual transaction.



Note: The "Transaction Settings" box will pop up to allow the Name, Description, Time Zone (Default is Eastern), Email Reminders, Expiration, and Font Size for the individual transaction can be modified.

(see next page for continued instructions)

2. **E-Signing** a document or documents (from email), **Click** on (1) to the right of "**Recipients**" on the left navigation bar to add a new producer signature. **BEST PRACTICE** is to add as many Recipients as you can to one package. Include all operators, owners, and other tenants to this one package.

< FSA-2001	Reques	st for Direct Loan Assistan	Draft
RECIPIENTS ①		This form is available electronically	
Gina smith	>	FSA-2001 (03-06-15)	U
Jane Farmer	>	(05-00-15)	
-			REQUES
Accept Only		INSTRUCTIONS: FSA suggests app	licants use th

a. On the "**Recipient**" tab enter the required information marked by an asterisk. Title and Company are optional. You will receive an error message if you fail to enter the required data.

Recipient	•	Recipient Details for Add Recipie	ent	
Authentication		Recipient *		
Advanced	•	First Name *	Last Name *	
		Email *		
		Title	Company	
		Language		
		English	r	

IMPORTANT: Verify you have entered the correct Recipient Details, especially the email address!

- b. On the "**Authentication**" tab you must select the Q&A or SMS for the 2 Factor Authentication method:
 - **Q&A** Enter a question and answer the producer will be able to answer.

(see next page for screenshot and continued instructions)

Add Recipient	×
Recipient • Authentication •	Authentication Method for Add Recipient Type General
Advanced	Please select the authentication method for verifying the recipient's identity.
	O SMS ◎ Q&A
	The identity of the recipient is verified using the secure question(s) & answer(s) defined below. A minimum of one Q&A is required.
	Question 1*
	Answer 1 *
	Mask the answer when entered by the recipient
	Question 2
	Answer 2
	Mask the answer when entered by the recipient
	CANCEL SAVE

• **SMS** – Sends a text message to the producer's smart phone number with a code.

Add Recipient	
Recipient	Authentication Method for Add Recipient
Authentication	General 👻
Advanced	Please select the authentication method for verifying the recipient's identity.
	SMS ○ Q&A
	The identity of the recipient is verified using the secure SMS code that is sent to the recipient's cell phone number provided below. The recipient will have to enter this code to start signing. Mobile phone number*
	• (201) 555-5555
	Please enter a valid phone number.
	CANCEL SAVE

c. On the "**Advanced**" tab for the selected Recipient allows you to enter a "Personal Message" to the individual recipient.

Recipient	Advanced settings for Add Recipient	
i comprome	Add a personal message to the recipient.	
Authentication	Personal Message	
Advanced	Allow a recipient to accim comeone also to sim the transaction	
	Change Signer	

3. **In-Person eSigning** a document or documents (**face-to-face scenario**) by selecting the **Back Arrow** to the left of the title on the transaction.

🔔 Test E - FSA-520 (05-23-22) Emergen	cy Relief Program (ERP) Phase 1 Application.pdf on OneSpan Sign FedRAMF	- powered by Box - Google Chrome	- 0 ×
nrcs.app.box.com/services/a	aA6YbnypI1/16927/992277004754/64dc40.cd7a49d3e5348d	16bf5499c809578dab88d8f2babea53df3985	6eb09e0c370ea4?node_type=file Q
Test E - FSA-520	(05-23-22) Emergency Relief Draft	i 🌣 🖥 🖡 👁	SEND TO SIGN 🚀
RECIPIENTS 🛨	FSA-520 U.S. DEPARTMENT OF AGRICULTURE (05-23-22) Farm Service Agency	Form Approved OHB Represent OHB Represent 1. Crep Year 2. Application Namber 11/30/2022 1. 2022 1 1	
Gina Smith >		3. Recording State Name/Code 4. Recording County Name/Code Network 29 Note 087	Drag & drop files to upload
Accept Only	EMERGENCY RELIEF PROGRAM (ERP) PHASE 1 APPLICATION	5A. Name and Address of Recording County FSA Office (Include City, State and Zip Code) Wound City Service Center Wound City HO 6	V belectronic Dis 000
		5B. Recording County FSA Office Telephone No. (Include Area Code) 111-222-1234	
FIELDS	TeXTE: The following suscess in more an accurate with the Plany Act #195 (5102 K) as an anxiet, The same accurate with the Plany Act #195 (5102 K) as an anxiet, The same accurate the plany accurate accurate the p	The purposed part information below that the term is the Excluding Generalized Term and the term is the information that the term is the t	
GS Signer Initials	 Lo comply with the Notice or inuns Availability positivities by E-SA. A copy of this document may be shound at may To provide the FSA may additional information requested by FSA to verify that information provides the site in its verses after the date of approval. All information provided to FSA for program eligibility and payment calculation p distanter event, as subject to spot check. 	s /vww/sia usda gov/programs-ano-services/entergency-reletationex accurate. Producer is required to retain documentation in support of their application for 3 auposes, including certification that a producer suffered an eligible loss due to a qualifying	
$\frac{1000}{17}$ Signing Date	 To comply situ, separent distribution and gument eligibility proteinane by submitting the following forms within 60	days, if not already on file with FSA: (cable)	V Test E - FSA-5 000
	The application will not be considered complete until all producers that have a share of the RP Phase 1 payment member of a nettry to imply submit all information required may result in no payment, or a reduced payment.	nuncation (in apprication), nt have completed all required items and signed in item 24. Failure of an individual, entity, or	N. There (1997) There is a second se
Signer Title	4. The for the survey of controllations in them 5 model as a subject to the survey of the survey	ce indemnity or NAP payment that I necessed was due, in whole or in part, to a crop production net means while the humanes including excessive wird, shown supper, formador, teppolal that accurate as a all early anomatine (ward) or folding), denoted for halfing excessive wird and an anomatine that anomatine (ward) or folding), denoted for halfing excessive wird end 2027. Related conditions mean lampings wather and alwatere induced coursenses that new an area want the recent wird ward wards was alwated ward and another for far any period of time during the applicable calendar years. A list of courses that and all things human black optingstarm and excences memory and listificable.	
		DATE STAMPED	

a. Scroll down the page to the "Transaction details" section. **Click** the downward arrow next to the **eSigning** field to change the default to **In-Person eSigning**.

	NEXT >
Transaction details	
Name *	
lest E - FSA-520 (05-23-22) Emergency Relief Program (ERP) Phase 1 .	
Description	
Message to all recipients (optional)	
eSigning	
In-Person eSigning	
Terms and Conditions Privacy Statement System Status Community Online Help Site Map	
Convright 2022 OneSpan All rights reserved	
copyright zozz, oneopait An rights restrict.	

(see next page for continued instructions)

b. The "Transaction details" section also provides the ability to add a **Description** for reference later; as well as a **Message to all recipients (optional)** to be included on the OneSpan email sent to the Recipients added to the document(s).

rancaction dat	aile			
ansaction dei	diis			
lame*				
FEST A - AD-1026 H	ELC and WC Producer (Certification - Clic	k-to-Sigr	
Description				
Description				
Message to all recipi	nts (optional)			

c. Scroll to the "**Recipients**" section. **Click** on ① to the left of "**Add Recipient**" to add a producer. Enter the required information marked by an asterisk. You will receive an error message if you fail to enter the required data. **BEST PRACTICE** is to add as many Recipients as you can to one package. Include all operators, owners, and other tenants to this one package.

Customers **WITHOUT** an email address can use the "FPAC Universal Email Address" provided by the employee. To do this option, the customer **WILL NOT** receive an email via a mobile email inbox and **MUST** be handed a printed copy of the signed documents prior to leaving the service center.

FPAC Universal Email Address: SM.FPAC.FSA.INPERSON.KIOSK@USDA.GOV

IMPORTANT: The FPAC FSA Universal Email Address account is not being monitored for questions. It is only to be used for the OneSpan Recipient email address field when a customer, **NOT** an employee, is in-person at the service center and does **NOT** have an email address.

(see next page for screenshot and continued instructions)

^{<} Test E - FSA-520 (05-23-22) Emergency Relief Program (ERP) Phase 1 Application Packa	Draft NEXT >
Documents	
1 🗋 Electronic Disclosures and Signatures Consent	
2 🗋 Test E - FSA-520 (05-23-22) Emergency Relief 000	
Orag & drop files to upload	
ADD DOCUMENT	
Recipients	
	000
Transaction details	

IMPORTANT: **DO NOT** drag & drop files to upload! Doing so will not allow the document(s) added to return to the box folder once the signing ceremony is complete. You must either finish this transaction or go back to the folder in Box to add document(s) and start the process over.

d. *Click* on the "*Settings*" icon to update the Transactions Settings for each recipient added.

ſ	Recipients						
l	Set signing order						
l	 Gina 	Smith	gina.smith@usda.gov	USDA			000
l	👤 Jane	Farmer	janefarmereauthentication@gmail.com	Title	Company 🔶	Settings 🔅	
l	ADD RECIPIENT					Remove X	_
ŀ						Move up ↑	
	Transaction details						圃

(see next page for continued instructions)

e. On the "Authentication" tab you must select the Q&A or SMS for the 2 Factor Authentication method. Detailed screenshots can be found in paragraph 2b above.

Jane Farmer			×
Recipient	•	Authentication Method for Jane Farmer	
Authentication	•	General	
Advanced		Please select the authentication method for verifying the recipient's identity.	
		O SMS O Q&A	
		CANCEL	SAVE

f. On the "**Advanced**" tab for the selected Recipient allows you to enter a "Personal Message" to the individual selected recipient.

Add Recipient		×
Recipient •	Advanced settings for Add Recipient	
Authentication •	Personal Message	
Advanced	Allow a recipient to assign someone else to sign the transaction.	
	Change Signer	
	CANCE	L SAVE

(see next page for continued instructions)

g. The "**Set signing order**" workflow determines the order in which multiple signers can participate in the signing ceremony. Simply click on the toggle button to turn it on. You will notice numbers now appear to the left of each recipient.

A signer with a signing order 1 means that recipient will sign first. Hence, a signer with a given signing order can participate only after all signers with lower signing orders have completed signing. Also, two signers with the same signing order can sign documents simultaneously. Furthermore, the second signer will receive an email notification to sign the document only after the first signer has completed signing the document and so on and so forth.

Recipients Set signing order			
1 🚺 Gina	Smith	gina.smith@usda.gov	USDA
2 💄 Jane	Farmer	janefarmereauthentication@gmail.com	Title
з 💄 сл	Farmer	janefarmereauthentication@gmail.com	Title

h. A signer can be moved to a new signing order by holding your cursor over the double dots and dragging it up or down. You can also click on the more options (3 dots) to the right of the recipient by selecting the "Move up" or "Move-down" options, as applicable.

IMPORTANT: Use the "Set Signing Order" when adding an Approving Official to any document within the transaction. The Approving Official will always be the last available number in the signing order.



(see next page for continued instructions)

i. **Click** on the "**NEXT**" icon once all recipients and the signing order has been set, if applicable. This will take you back to the document(s) to add signature blocks.

< Test E - FSA-520 (0)	5-23-22) Emer	gency Relief Program (ER	P) Phase 1 Ap	oplication Packa	Draft NEXT >
Documents					
1 🗋 Electronic Disclosures and Sig	natures Consent	000			
2 🗋 Test E - FSA-520 (05-23-22) Er	mergency Relief	000			
Drag & drop files to upload					
ADD DOCUMENT					
Recipients					
Set signing order					
1 💽 Gina	Smith	gina.smith@usda.gov	USDA		000
2 💄 Jane	Farmer	janefarmereauthentication@gmail.com	Title	Company	000
з 💄 сл	Farmer	janefarmereauthentication@gmail.com	Title	Company	000

NOTE: An error message will appear if you have forgotten to set up the Authentication method required for all recipients before proceeding. Click on the more option (3 dots) to the right of the Recipients name.

- 4. Add signature(s) to the document by **scrolling down the page** until the signature block on the document is visible.
 - a. Click on a recipient from the available list of previously added names. Click or Click and Drag on "**Signature**" and the signature stamp will appear. *All signature stamps are two and a quarter inch (2 ¼) wide by half inch (1/2) tall.* Click on "**Signer Initials**" and the recipients initials will appear. Drag, drop and resize to fit within the signature block on the form.



(see next page for continued instructions)

Note: If you chose the multiple forms option, continue to scroll down the page to navigate to the next form or select it from the right navigation bar to go directly to the desired document.

b. When you add a Signature or Signer Initials, the remaining FIELDS will become available for selection. Below I have added the Signer Initials with a Signing Date; as well as, a Signature, Signing Date, and two Checkbox's.

Note: The **"Signing Date**" is **optional**. The Date will display within the Producer's Signature Block after the producer digitally signs.

D. D.		
Accept Only		FIELD SETTINGS yspelicgusygv
J Signature	Initials:	∧ Settings
JF Signer Initials		Field Name Producer Signature
17 Signing Date		Recipient
Signer Name		Jane Farmer *
a+ Signer Title		Signature Type Click-to-Sign
Bigner Company	FSA-2001 (03-06-15) PART F - CERTIFICATION AND SIGNATURES	Page 8 of 8 is optional
I Text Field	CERTIFICATION: Terrify that the hydrmation provided is trile, complete, and correct to in provided in good faith to obtain a loan. (WARNING: Section 1001 of Title 18, United States to to those who provide false statements to the Government. If any information is found to be fail grounds for deniel of the requested action).	Code, provides for criminal penalties Ise or incomplete, such finding may be
Text Area	TA. Signature of Individual Applicant, Spouse or Entity Member 1B. Capacity Click-to-Sign Self	1C. Date Signed (MM-DD-YYY) Signing Date
Checkbox	Entity Representat	tive
O Radio	2A. Signature of Individual Applicant, Spouse of Entity Member 2B. Capacity Self	2C. Date Signed (MM-DD-YYYY)
∯≣ List	Entity Representat	tive

Note: Click on the "**Delete**" key after selecting one of the added fields to remove it from the document *or Click on the "More Options" (3 Dots) on the FIELD SETTINGS table.*

(see next page for continued instructions)

c. With the producer **signature stamp selected**, locate the **FIELD SETTINGS** menu on the right side of the screen, **Click** on the dropdown arrow under the "**Signature Type**" field. Select "**Capture signature**" to allow a handwritten signature for the selected stamp. Doing so will change the name of the stamp from "Click-to-Sign" to "Capture signature".

< Test I - FSA-520	(05-23-22) Emergency Relief P Draft ① 🔅 🗟 🛛	🖹 💿 send to sign 🖪
RECIPIENTS (+)	State-Conty Code Code Payment on the Code Payment on the Code Paymen	FIELD SETTINGS
Gina Smith	PARTE = PRODUCER CEAUPCATIONS. I certify dat all information on this application, whether entered by me or by someone elior on my behalf, is true and correct. I understand that if any information is determined by the original structure of the second structure of the sec	mined to be in Astronomy A
Jane Farmer	enor, un apprendent un y or exercise, una radi entro sing i rearia ai screenamano o la mangaourgi in suice o ai par. 246. Tes analyzation de la screenama de la constructiona de la screenamano o la mangaourgi in suice o ai par. 246. Tes analyzation de la screenama de la	P Field Name
FIELDS	Representative Capacity PART F = FAR REPRESENTATIVE CERTIFICATION 258. Data Signed (MACO 25	Recipient Jane Farmer 💌
🖉 Signature	In accordance with Prefere and rights are not UECA out rights regulations and parkets that UECA. Its agences, offices, and enriphyses participating for or administrating UECA programs are participated from documenting out involved right, which are used in administration of testing agence and te	isaad or roo. Signature Type Click-to-Sign ✓ Click-to-Sign Cathward Click-to-Sign
JF Signer Initials	The second	Click-to-Initial
Signer Name		✓ Field Formatting
<u>⊜</u> <u>ā</u> ∋ Signer Title		
Signer Company		

d. Once you have the stamp(s) added to the document and made the necessary edits, you will see the "FIELD SETTINGS" box on the right hand of the page. Click on the "More Options" (3 dots) and you will see a dropdown list of Duplicate and Delete.

Click on **Duplicate** to add an identical stamp to your document. Now you can drag and drop it in the next available signature field for the same producer.

									FIELD SETTINGS	
Gina Smith >									IR6DeCozPgoT	Duplie
Jane Farmer	FSA-520 (05-23-22) PART D - NAP CRO	OP INFORMATION						Page 3 of 3	∧ Settings	Delet
GG Smith >	16. Admin State/County	17. Unit	18. Crop	19. Pay Group	20. NAP Payment	21. Estimated ERP Payment (Prior to adjustments)	22. In return for receiving an ERP	23. I certify that I had a qualifying loss as	Field Name	
Accept Only	Code						crop, I agree to purchase crop insurance or NAP as provided in	denned in Parck.	Recipient Jane Farmer	÷
ELDS							Yes No	Yes No	Signature Type Capture signature	÷
Signature	PARTE – PRODUC I certify that all infor error, the application	ER CERTIFICATIONS rmation on this applicatio a may be denied, and such	n, whether entered by m a errors may result in a d	e or by someone else on letermination of ineligibi	my behalf, is true and lity in whole or in part.	correct. I understand that it	f any information is c	letermined to be in	Is optional From file	
	24A. Producerie Prin	nary Policyholder's Signa apture signature ne Farmer	Nure (By)	248 Title/Relations	hip of Individual Signin esignature	in a Representative	24C. Date (MM-DD-	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
J Signing Date			_	24E. Title/Relations	hip of Individual Signin	g in a	24F. Date (MM-DD-	(1111)		
Signer Name Signer Title	24D. SBI Signature	(By) lick-to-Sign GSmth		Representativ	e Capacity					

(see next page for continued instructions)

 Once you have all the required signature stamps added to the form(s), Click "SEND TO SIGN" to automatically generate an email to the producer(s) added to the package. A confirmation message will appear, and you must click "SEND TO SIGN" one more time to confirm.

< FSA-2001 Requ	est for Direct Loan Assistan Draft		@ 6. 6>	SEND TO SIGN	1
Accept Only		← - 1	$ \rightarrow \perp @ @ 1$ Clear All	FIELD SETTINGS	×
FIELDS			*	y5p8IGGU5YgV	000
/ Signature	Initials: Date:			∧ Settings	
JF Signer Initials				Field Name Producer Signature	
^{g−a} ¹ ¹ ¹ ¹ ¹ ¹ ¹ ¹ ¹ ¹				Recipient Jane Farmer	
L Signer Name				Contraction Data	
Signer Title				Click-to-Sign	•
Signer Company	FSA-2001 (03-06-15) PART F – CERTIFICATION AND SIGNATURES		Page 8 of 8	Isoptional	
E Text Field	CERTIFICATION: 1 certify that the information provided is tri- provided in good faith to obtain a loan. (WARNING: Section 10 to those who provide false statements to the Government. If any grounds for denial of the requested action).	ie, complete, and correct to the bes 901 of Title 18, United States Code information is found to be false of	st of my knowledge and is 9, provides for criminal penalties 1 incomplete, such finding may be	✓ Field Formatting	
Text Area	1A. Signature of Individual Applicant, Spouse or Entity Member	1B. Capacity	1C. Date Signed (MM-DD-YYYY)		
Checkbox	Cick-to-Sign Jane Farmer	Self Entity Representative	Signing Date		
Radio	2A. Signature of Individual Applicant, Spouse or Entity Member	2B. Capacity	2C. Date Signed (MM-DD-YYYY)		
8= 11+					

Complete! You have now sent a package for digital signature to your producer(s).

7.2 Conducting an In-Person eSigning Session

- With OneSpan Sign, transaction owners can send documents for signatures and let recipients esign remotely over the web **or** in a **face-to-face scenario**. A combination of eSigning and In-Person eSigning can be done all in one package.
 - 1. After clicking "SEND TO SIGN", OneSpan will automatically generate an email to all producer(s) added to the package. An **In-Person eSigning** confirmation message will appear, **Click** on "**YES**" to continue. **Note**: No signing action required for the email sent to the producer signing in person.

Confirm Do you want to start signing?	NO YES

a. Select the producer that is in person to sign and CLICK on the "Start" button.

Welcome, Gina Smith	
/ou are the host for the transaction 'Screenshots - In-Person Sign Package'. Select a recipient to begin signing.	
Gina Smith	
gina.smith@usda.gov	
Owner	
Optional - Review	
Jane Farmer	
j <u>ane.farmer@gmail.com</u>	
<u>Signer1</u>	
Actions Required - Review & Sign	
	START

(see next page for continued instructions)

b. **EMPLOYEE RESPONSIBILITY: Click** on the "**PROCEED**" icon to continue to hand off the documents to be e-signed by the previously selected producer.

 Recipient Hand off 	×						
You are handing off the documents to be e-signed to Jane Farmer. If you select to proceed, you must hand over the controls to Jane Farmer.							
<u>CANCEL</u> PROC	EED						

c. **PRODUCER RESPONSIBILITY: Click** on the "**PROCEED**" icon to confirm the mouse has been handed off to review and e-sign documents.

i Recipient Hand off		×				
Jane Farmer, confirm that you intend to review and sign the documents.						
	CANCEL	PROCEED				

After the producer proceeds to the e-signing ceremony, the Electronic Disclosures and Signatures Consent form will display, and the producer must click Accept to continue. Once the producer taps **Accept**, the producer will be prompted to **Tap** on either an **Initial** or **Sign** stamp. If there are multiple initials and/or signatures required, producers can click on the next signature arrow, or they can manually scroll down to the next signature.

d. **PRODUCER RESPONSIBILITY: Hand** the mouse back to the employee.

Thank You, Jane Farmer	
You have completed signing your documents. Please pass the controls back to the host of this transaction.	
	DONE

e. **EMPLOYEE RESPONSIBILITY: Click** on the "**DONE**" icon to complete the producers e-signing ceremony and continue to the next available producer, if applicable.

(see next page for continued instructions)

- f. **Example** of a completed **In-Person eSigning** transaction. This transaction is one of two scenarios.
 - 1. Gina Smith eSigning as the FSA Representative Approving official on the document and Jane Farmer, as the producer
 - 2. The document did not require an approving official and only the producer, Jane Farmer, eSigned.

e in person transaction signing is complete. You can now view or download the signed documents.	
DOWNLOAD DOCUMENTS (2)	
Gina Smith gina.smith@usda.gov Owner	Done 🥏
Jane Farmer ane.farmer@gmail.com Signer1	Done 🥑
	REVIEW DOCUMENTS

g. **Example** of an incomplete transaction waiting on the FSA Representative Approving official to sign the document or possibly a producer who was not in person to sign. **Click** on the **"EXIT SIGNING MODE**" icon to exit the signing ceremony.

		MORE ACTI	ons 🗸
	\rightarrow	EXIT SIGNING MODE	Z
		LANGUAGE	EN
Welcome, Gina Smith 'ou are the host for the transaction 'Test E - FSA-520 (05-23-22) Emergency Relief Program (ERP) Pha ielect a recipient to begin signing.	se 1 Application Package!		
1. Jane Farmer janefarmereauthentication@gmail.com Signer)	Done 🥥		
2. CJ Farmer janefarmereauthentication@gmail.com Signer2	Done 🥑		
3. Gina Smith gina.smith@usda.gov Owner Actions Required - Review & Sign	Not started O		
	START		

Complete! You have now finished the In-Person signing ceremony.

7.3 Mobile OneSpan Email Workflow

- Producers with smartphones may find it convenient to digitally sign documents directly from their phone. To do this, they will receive an email via their mobile email inbox on their phone.
 - 1. **Click** on **Go To Documents** to enter either a 6-digit code via text message or a Q&A will be required to access the document(s). Once the producer has completed their 2 Factor Authentication, the **Electronic Disclosures and Signatures Consent** form will display, and the producer must click **Accept** to continue.



Note: It is not necessary for the producer to download the Box app if they are only using OneSpan to digitally sign.

2. Once the producer taps Accept, the producer will be prompted to Tap on either an Initial or Sign stamp. If there are multiple initials and/or signatures required, producers can click on the View the next signature arrow at the bottom of the screen, or they can manually scroll down to the next signature. Click on Please confirm to complete when done signing and Click on OK for submission.



Important: Employees should use caution when adding Checkboxes or Radio Buttons. The producer must be aware to click on the appropriate one BEFORE signing and submitting. It is very difficult to see these options on a mobile device.

3. Once the producer taps OK to confirm the signatures, two separate actions will occur. The Transaction is complete will display and a separate email will be sent to the producer informing them the signing is now complete. To download the signed document(s), Click on the left arrow on the "Transaction is complete" page OR Click on the "DOWNLOAD COMPLETED DOCUMENTS" on the Signing Completed email.

(see next page for screenshot and continued instructions)



4. **Complete!** The producer has now signed and downloaded a document from a mobile device.

8. OneSpan – Edit New Package

- You may need to edit some of the detailed information for your recipient(s) or add an additional recipient(s) to a new package prior to sending for signature. In this example the first name and last name are reversed.
 - 8.1 Edit a New Package for eSigning and In-Person eSigning.
 - 1. Click on the right arrow next to the recipient, then Click on "Edit".

< Soldner, Brandon P	Pack Draft						D D D D D D D D D D D D D D D D D D D		٢
1	(Include Area Code): (920) 386-9999 x	2							T
RECIPIENTS 💮	THIS CONTRACT is entered into between the (referred to as "the Participant".) The Partici CCC for the stimulated contract period from	e Commodity Cred ipant agrees to pla the date the Contr	lit Corporation (ref ace the designated	erred to as "CC acreage into th	C") and the undersigned e Conservation Reserve	l owners, operato Program ("CRP",	rs, or tenant) or other us	s e set by	
Gina smith >	Gina smith > Gina smith C C and the participant and participant and participant and C C and the participant and the participan								
Soldner Brandon bsoldner@gmail.com	Program Contract (referred to as "Appendix" applicable contract period. The terms and co thereto. BY SIGNING THIS CONTRACT PAR thereto; CRP-2; CRP-2C; or CRP-2G.	 By signing bek onditions of this c TICIPANTS ACKN 	ow, the Participant ontract are contain OWLEDGE RECEIF	acknowledges ned in this Form PT OF THE FOLI	CRP-1 and in the CRP- CRP-1 and in the CRP- LOWING FORMS: CRP-1	Appendix/Append Appendix and a CRP-1 Appendit	fices for the ny addendur x and any ad	n dendum	
	9A. Rental Rate Per Acre \$151.4	6	10. Identificati	on of CRP La	nd (See Page 2 for ad	lditional space)			
Accept Only	9B. Annual Contract Payment \$ 2,675	.00	A. Tract No.	B. Field No.	C. Practice No.	D. Acres	E. Total E Cost-	stimated Share	
	9C. First Year Payment \$		57117	0006	CP2	1.18	\$ 62	3.00	
FIELDS	(Item 9C is applicable only when the first year payment is		57117	0007	CP2	2.44	\$ 1,2	88.00	
	prorated.)		57117	0008	CP25	7.07	\$ 5,1	94.00	
R Signature	11. PARTICIPANTS (If more than t	three individual	ls are signing, s	see Page 3.)					Τ.
6 Signature	A(1) PARTICIPANT'S NAME AND	(2) SHARE	(3) SIGNATURE ((Ву)	y) (4) TITLE/RELATIONSHIP O		(5) DATE		1
SB Signer Initials	ADDRESS (Include Zip Code) BRANDON SOLDNER N1232 SOLDNER RD ANYMERE MT 52599	100.00 %	Click-to-Si Soldner Bran	l gn don	INDIVIDUAL SIGNI REPRESENTATIVE	NG IN THE CAPACITY	(MM-DL Signing Date	-****)	
17 Signing Date	B(1) PARTICIPANT'S NAME AND	(2) SHARE	(3) SIGNATURE (By)	(4) TITLE/RELATIONS	HIP OF THE	(5) DATE		Π.

2. The "**Recipient**" box will display. In this example you would update the First and Last name and Click "**Save**". Any information on the "**Recipient**" or **Authentication**" tabs can be updated.

ecipient	• Recipient Details for Sol	dner Brandon	L3
uthentication	• Recipient	*	
dvanced	First Name*	Last Name *	
avanced	Soldner	Brandon	
	Email *		
	bsoldner@gmail.com		
	Title	Company	
	Language		
	English	*	

3. **Complete!** You have now edited recipient(s) on a package. Click "**SEND TO SIGN**" to automatically generate an email to the producer(s).

9. OneSpan – Edit Sent Package

In a typical edit after sending situation, the employee may find the signer has encountered a problem and information needed edited (i.e. didn't receive the email, didn't receive a text message, the Q&A does not work) The employee may find they did not include all of the proper representative authority blocks, a signer was not added, etc. If a situation arises where changes are needed, follow the next steps to edit or add information as necessary:

Note: Editing after sending a package does not incur an additional charge. The original transaction cost still applies.

- 9.1 Edit a Sent Package for eSigning and In-Person eSigning.
- 1. In Box, **Select** any document from a producer's folder and Click on the "**Send With OneSpan Sign FedRAMP**". The Draft Package will display. Click on the "left arrow" next to the title of the package.



2. Click on the "left arrow" next to the title of the Package.

CRP-1 WI027 F12926 T57117 C	P2 CP25 S4 Package Draft			NEXT >
1 Detectronic Disclosures and Signatures Consent 2 CRP-1 W1027 F12926 T57117 CP2 CP25 54 Image: A constant of the stoupload Image: A constant of the stoupload	000		b.	
Recipients Gina smith	ginasmith@usdagov	USDA		000

(see next page for continued instructions)

3. The **Transactions** page will be displayed with the ability to select a package from the Inbox, Drafts, Archived, or Trashed tab. Locate your Transaction name and **Click** on the blue hyperlink under the Transaction name column. Remember you can only edit information for Recipients who have not started or completed signing.

Transactions					ANSACTION
Q Search From To	CLEAR				
Inbox Drafts Archived Trashed					
Transaction name	Recipients	Last Updated 👃	Status	Expiry Date	Actions
Soldner, Brandon Package	Soldner Brandon, Gina smith	Jul 16th, 2020	In Progress		000
FSA-2001 Request for Direct Loan Assistance Package	gina smith, Jane Farmer	Jul 16th, 2020	In Progress		000
WI027, Farm 12929, Tract 57117, CP2 CP25	Brandon Soldner	Jul 15th, 2020	Completed	Jul 24th, 2020	000
FSA-2001 Request for Direct Loan Assistance	Jane Farmer	Jul 15th, 2020	Completed		000
					•
	Show 20 ~ < 1 >				

4. Locked Package - When a producer has been locked out due to too many authentication attempts, the employee can view the transaction, then click the "Unlock" icon next to the recipient's name in the "Recipients' section. An additional option to resend the email notification to an individual producer is available.

Recipients		
Signing order was not set		
Amber Herz	amber.herz@usda.gov	
1 Jane J Farmer	jane.j.farmer@gmail.com	E

5. **Click** the "**Edit**" option to enable the ability to modify the Recipients. Additional options are available if you need to resend email notifications to all recipients on the package, resend email notification to a single recipient, download the package to your computer or trash the package.

Soldner, Brandon Pack Documents	cage In Progress			
1 🕞 Electronic Disclosures and Signatu 2 🗋 CRP-1 W1027 F12926 T57117 CP 3 🗋 CRP-2 W1027 F12926 T57117 CP	res Consent 2 CP25 54 3 3 3 3 3 3 3 3 3 3 3 3		Q.	
Recipients Signing order was not set Gina smith Soldner Brandon	ginasmith@usda.gov ginas220@gmail.com	527		

(see next page for continued instructions)

 Click the "More" options, then "Settings" or "Remove" to the right of the recipient or Click the "Add Recipient" option to add an additional signer to the transaction. When done, Click the "NEXT" button at the top right corner when you have finished all the required edits.

< Soldner, Brandon Package	Draft						ext >
Documents							
1 🕞 Electronic Disclosures and Signatures Conse	ent ooo						
2 🗋 CRP-1 WI027 F12926 T57117 CP2 CP25 54	4 000						
3 🗋 CRP-2 WI027 F12926 T57117 CP2 CP25 S4	4 000						
Drag & drop files to upload							
Recipients							
Set signing order							
③ Gina smith	h	gina.smlth@usda.gov	3	USDA			000
L Soldner Bran	don	ginas220@gmail.com		Title	Company		000

Note: Edits made to the First and Last Name will be automatically applied to the signature blocks on the document(s) after clicking "NEXT".

- 7. Limitations of Editing after Sending
 - a. IF you have a package with a single recipient who has clicked to sign some of the signature blocks, but not all of them you will see a yellow block under the document package **AND** you will not be able to edit the package
 - b. IF you have a document package with multiple recipients you will ONLY be able to edit information for the recipients that **HAVE NOT** started or completed clicking to sign documents.
 - c. Recipients that have completed the click to sign process will not receive another email to sign the document(s) again. Only recipients who have been edited **OR** have partially completed the signing process will receive the same email notifying them to sign in a new email notification "**Search for a Document to add to this package**" search bar.
 - d. Documents that have already been signed at least once by any recipient cannot be edited to add additional signature blocks
 - e. You cannot add or remove a recipient (or recipients) from a document package if ANY recipient in that transaction has clicked to sign on ANY document in the document package

8. **Complete!** You have now edited signers on a package. Click "**SEND TO SIGN**" to automatically generate an email to the producer(s).

10. How to Download Box Drive and Manage Documents

- Access all your Box files directly from your desktop, without taking up much hard drive space. Box Drive is natively integrated into Mac Finder and Windows Explorer, making it easy to share and collaborate on files.
 - 1. In the "Search" option at the bottom left corner of the screen, enter "Software Center" and select it from the list provided. Once the "Software Center" displays, enter Box Drive in the search box at the top right corner and press enter. Click on "Box Drive" from the results list.

P Software Center	· · · · · · · · · · · · · · · · · · ·			- 0 X
USDA-OCIO-CEC				
Applications 2 Updates Operating Systems	All Required Filter All Sort by: Most r	ecent *	[Box Drive 🗙
Installation status	Name	Publisher	Version	Status
Coptions	Box Drive 2.14.378	Box	2.14.378	Available
		ß		

(see next page for continued instructions)

2. **Click** on the "**Install**" button. The configuration popup box will display with the time remaining. Once it is done, you will be prompted to restart your system for the configuration changes to take effect. **Click** Yes to restart now **or** No if you plan to manually restart later.

P Software Center		
USDA-OCIO-CEC		
Applications 2	Applications > App	plication details
C Updates		Box Drive 2.14.378
C Operating Systems	box	Published by Box
Installation status		Install
Coptions		
		CRQ3751554 Basic App Description: BOX Drive 2.14.378 is new update that allows access to all Box files directly from your desktop. While consuming minimal hard drive space. Restart Required - No License Required - No
		Status: Available Version: 2.14.378 Date published: Not specified
		Restart required: No Download size: Less than 1 MB Estimated time: Not specified Total components: 0

(see next page for continued instructions)

3. Once you have completed a "**Restart**", in the "**Search**" option at the bottom left corner of the screen, enter "**Box Drive**" and select the Box Drive App. You will be prompted to sign into your account. Make sure to use your government email address and then log in with PIV/CAC. You may take a tour of the Box Drive functionality if desired.

🔤 Box Login	-	×
бох	Sign Up	^
Sign In to Your Account		
Email Address	_	
I		
Next		
Reset Password		
		~

4. You will now see Box Drive in the left navigation bar of the File Explorer. You can easily manage your Box folders and documents from here.



5. Click on the up arrow on the "Notification Area" or "System Tray" located in the Windows Taskbar, usually at the bottom right corner next to the clock. It contains miniature icons for easy access to system functions such as modem, sound volume, battery status, and more. Click, hold and drag the box icon to the system tray to quickly search for producer folders.



6. Complete! You have now successfully added Box Drive.

11. Approving Documents in OneSpan

- Many FSA documents require an approving official signature. When an eSignature is needed, the approving official will receive a OneSpan email for each transaction. If you have multiple transactions in a day or over a period of a few days, this can become overwhelming to access each individual email, 2FA into the document(s), and eSign. This section will explain how to approve documents via the OneSpan dashboard (<u>https://gov.esignlive.com/fpac</u>) with eAuthentication. It will speed up the approval process when there are many transactions waiting for approval.
 - 11.1 Signing Transactions in OneSpan
 - 1. **Click** on the "**REQUIRES MY SIGNATURE**" option from the Dashboard. You will be presented a transaction to eSign. Once it is complete, you will be asked if you wish to continue with the next available transaction, if applicable. You may continue or exit to end the signing ceremony.

IMPORTANT: Please make sure you **REVIEW** each document within the transaction making sure **ALL** required signatures have been affixed prior to approval. As always, **DO NOT** create a new transaction from the OneSpan Dashboard.

OneSpanfign Dashboard Transactions Templates			6
	Start your first transacti		
Dashboard			
My Transactions			Last 30 days
0 REQUIRES MY SIGNATURE	↓ COMPLETED	Ø IN PROGRESS	
Recent Transactions View all			Last 10 transactions
Transaction name	Recipients	Last Updated	Status
Deere. Beth [NRCS] Package	Beth Deere, Amber Herz	Aug 12th, 2022	Completed
Deere. Beth Package	Amber Herz. Beth Deere	Aug 12th, 2022	Completed
CPA-1155 203UK Redacted Package	Beth Deere. Amber Herz	Aug 8th 2022	Completed
	Beth Deere, Amber Herz	Aug 8th, 2022	Completed
CPA-1155 203UK, Redacted Package			
CPA-115-2030K Redacted Package	Beth Deere, Amber Herz	Aug 8th, 2022	Completed
CPA-115-2030F. KeBacted Tackage CPA-124522222 Pay Aon 1 Package NRCS-CPA-152. (Transfer: Agreement) Package	Beth Deere, Amber Herz Beth Deere, Amber Herz	Aug 8th, 2022 Aug 8th, 2022	Completed
CPA-1155_COURT Medicitier Parkage CPA-1245_22222_Pav_Aos_1 Parkage NRCS-CPA-152_Titransfer_Agreement1Parkage CPA-1245_22222_Pav_Aos_1 Parkage	Beth Deere, Amber Herz Beth Deere, Amber Herz Amber Herz, Beth Deere	Aug 8th, 2022 Aug 8th, 2022 Aug 8th, 2022	Completed Completed Completed

11.2 Signing Transactions On Behalf Of A Delegate in OneSpan

To keep business moving forward while you're away, you will need to delegate sending and signing privileges in your absence. OneSpan Sign offers Access Delegation, a convenient feature which allows you to grant others in your organization access to your OneSpan Sign

account while you're away from the office. With Access Delegation, your assigned delegate (i.e.: the person you have granted access to your OneSpan Sign account) can send and sign documents on your behalf during your absence

The **Access Delegation** option enables a user to delegate access to their OneSpan Sign transactions to one or more other users on their account. Specifically, delegates can sign documents on behalf of the delegator, and they can access the delegator's inbox, drafts, layouts, and templates. All transactions performed by the delegate nonetheless continue to be owned by the delegator.

This feature addresses use cases like the following:

- A manager must manage transactions, monitor transaction progress, and retrieve completed documents for employees who have sent transaction emails, but who are unavailable at the moment (perhaps they're on vacation, they've left the company, etc.).
- A group of users is responsible for distributing transactions. While one member of the group is away, another member must access the absent member's OneSpan Sign folders to: (1) see if a transaction was sent or completed; (2) retrieve any completed documents. Note: The preferred method is to add co-workers to the county office Box Folder as Co-owners, but just in case they forgot, this is a backup option.

NOTE: See subparagraph 2.1 to add a delegate to your OneSpan account.

1. Click the 'Manage delegation' icon found at the top right-hand side.

OneSpanSign Dashboard Transactions Templates			► <u>*</u> © @
	Start your first transacti		Manage delegation
Dashboard			
My Transactions			Last 30 days
REQUIRES MY SIGNATURE	↓ 13 √ COMPLETED	Ø IN PROGRESS	
Recent Transactions View all			Last 10 transactions
Transaction name	Recipients	Last Updated	Status
Deers.Beth (NRCS) Package	Beth Deere, Amber Herz	Aug 12th, 2022	Completed
Deere .Beth Package	Amber Herz. Beth Deere	Aug 12th, 2022	Completed
CPA-1155 203UK Redacted Package	Beth Deere. Amber Herz	Aug 8th, 2022	Completed
CPA-1155 203UK_Redacted Package	Beth Deere. Amber Herz	Aug 8th, 2022	Completed
CPA-1245 22222 Pay App 1 Package	Beth Deere, Amber Herz	Aug 8th, 2022	Completed

(see next page for continued instructions)

2. In the '**Manage Delegation**' dialog box, select a delegate name and then click 'Start Managing'.

REMINDER: See Section 2.1 on how to have another user add you as a delegate.

Manage Delegation	×
Currently delegating for: No Sender You can select a sender to start the delegation o	or stop the delegation for the current sender.
Q Search	
Amber Herz	amber.herz@usda.gov

3. The selected delegate can send and sign transactions on your behalf. The delegate also has access to your transactions.

With the Access Delegation feature, you'll no longer have to worry about monitoring transactions in your OneSpan Sign account while you're away.

OneSpanfign Dashboar	d Transactions Templates	ş [‡] ş MA	NAGE TRANSACTIONS FOR A	MBER HERZ
Dashboard My Transactions			Do	Last 30 days
2 REQUIRES MY SIG_				RESS
Recent Transactions View all				Last 10 transactions
Transaction name	Recipients		Last Updated	Status
Deere.Beth Package	Amber Herz, Beth Deer	e.	Aug 12th, 2022	In Progress
Deere, Beth INRCS Package	Beth Deere, Amber Her	2	Aug 12th, 2022	In Progress

(see next page for continued instructions)

- 4. Once you are finished signing on behalf of a delegate, you have two options to end the delegation:
 - 1. Simply **closeout** of the OneSpan Dashboard.
 - 2. **Click** on the "**Manage Delegation**" icon, select the delegate you are currently acting on behalf of and Click "**Stop Managing**".

Note: You can also switch delegates when more than one user added you as a delegate.

Manage Delegation		×			
Currently delegating for: Kirt Peterson (kirt.peterson@usda.gov) You can select a sender to start the delegation or stop the delegation for the current sender.					
Q Search					
Kirt Peterson	kirt.peterson@usda.gov	\checkmark			
	CANCEL 51	TOP MANAGING			

5. **Complete!** You have now successfully managed transactions on behalf of a sender.

12. Frequently Asked Questions (FAQs)

Why is my new employee able to log into Box but when they try to use the OneSpan Integration option it tells them to setup a OneSpan Account?

- Follow the steps in Section 2.1 of this user guide to activate your "Send with OneSpan Sign FedRAMP" account.
- If it is still not working after you have activated your OneSpan account, you may have created an individual Box account outside of the employee FPAC Box Environment. Please contact the ServiceNow Service Desk by submitting a ticket through the FPACNOW Portal or dafoprmd@usda.gov for assistance.

Is there a way to send an automatic email from Box to the recipient (farmer) when we add something to a folder?

- Yes. Documents sent using OneSpan Integration automatically sends an email to the recipients upon clicking "SEND TO SIGN".
- Yes, Documents uploaded into Box will send an automatic email notification if their settings are correct. Recipients can update their settings by selecting their profile at the top right corner of page, click "Account Settings", click "Sharing" tab, then place a checkmark on Downloads, Uploads, Comments, and Deletes under the "Notification Email" section.

Is it mandatory that customers use these new resources for signing and sharing documents?

No, It is not mandatory that customers use Box or OneSpan. While these free services do increase efficiency in document transactions between our customers and USDA Service Center staff, they are optional resources. Producers interested in hand delivering signed documents can do so by following social distancing protocols in place at their local USDA Service Center. Producers can also mail signed documents to their local Service Center via U.S. postal mail.

Will Box or OneSpan account access only be granted to permanent employees, and not temporary?

No, not necessarily. A license may be assigned to any employee with Level 2 eAuthentication.

What if a new employee needs access to a Box account?

The State Assigned Point of Contact will reach out to the ServiceNow Service Desk by submitting a ticket through the FPACNOW Portal to request access for any new employees who need access to Box. For additional assistance, the State POC may contact April Macdonald in DAFO at <u>april.macdonald@usda.gov</u> or <u>dafoprmd@usda.gov</u> and Gina Smith in OMS at <u>gina.smith@usda.gov</u>.

If access is granted for a temporary employee, what do I need to do to request the removal of access if he/she is not working but will remain on our rolls as an employee?

The State Office POC will reach out to the ServiceNow Service Desk by submitting a ticket through the FPACNOW Portal to request the employees Box and OneSpan user roles be removed. For additional assistance, the State POC may contact April Macdonald in DAFO at <u>april.macdonald@usda.gov</u> or <u>dafoprmd@usda.gov</u> and Gina Smith in OMS at <u>gina.smith@usda.gov</u>.

Do producers need an eAuthentication account to use Box or OneSpan?

No, Producers do not need an eAuthentication account to use Box or OneSpan. Box requires an email address and password, after the producer has verified their contact information with their local USDA Service Center. One Span requires identity verification through a 2 factor authentication (2FA) code sent to the producer's mobile device or, for landline customers, a question and answer option.

What USDA programs are eligible for sharing and/or signing via Box and OneSpan?

Any FSA document currently available for electronic signature can be managed using Box or OneSpan. This functionality is not program specific.

Can I use Box to send files to myself when teleworking?

No, that is not the purpose of Box. Box should only be used with sharing documents between FSA and producers. Please use shared drives, OneDrive, or encrypted email for sharing documents with telework.

Can I access Box + OneSpan outside of the office?

Yes, USDA Service Center staff can access Box outside of the office using either their Linc Pass on a USDA-issued computer or in the Citrix environment. Box is available on any personal computer – Windows or Mac – via eAuthentication, or through the Box app.

What if a producer has multiple entities/farms they work for or with?

Producers who have multiple ventures will still use the same folder with their name on it for all their farms/entities they work with. **Example**: Farmer, Jane J will be the folder name and you can place all documents (C J Farmer LLC, Jane J Farmer Revocable Trust, etc.) Jane is affiliated with and/or signs for in one folder.

Can I use Box for long-term storage of documents?

No, Box + OneSpan is not intended for long-term storage of files and documents. The purpose is to provide a simple and secure gateway between field offices and producers for the secure exchange of documents to maintain normal producer relations remotely. Documents must be removed from Box once they have been signed by all required parties. These documents should then be stored in locations as required by standing policy.

EXCEPTION: With the new Digital Records Management System (DRMS) being available Spring 2023, fully eSigned records can be stored in Box inside the File Folder titled "Program Files for Upload into DRMS". See Section 4.2 for instructions.

With OneSpan, are we now accepting electronic signatures on all forms, including the FSA-211 and loan document?

No, the FSA-211 form does not allow electronic signature. *Note:* Handbook 1-CM, Exhibit 50 contains a list of forms and documents not approved for electronic signature.

Can I place producer documents in the main Farm Loan or Farm Loan Programs folder?

No, this could cause a serious violation of PII. If a document is placed in a main folder and then access is granted to a producer to access the file, the producer will then have access to the main folder and everything else in it (including individual producer folders). That is why it is vital that documents are placed in individual producer files with the appropriate main folder and only the individual folder is shared with the producer.

Can I deviate from the folder structure shown in Section 6?

No, you must keep the two-level folder structure of FP or FLP and then the individual producer within it. No more sub-folders should be created beyond the point in this document. All documents relating to this producer, regardless of signatory privileges, will be temporarily stored in this singular location. Similarly, no producer files should be stored directly in the "Farm Programs" or "Farm Loan Programs" folders directly. This is because if you store a file there and then grant a producer access to it, they will see not only that file, but any other file in that folder and <u>any sub-folders (e.g. other individual producer folders) underneath it</u>. Therefore, it is critical to keep the producer folder structure as simple as possible to prevent accidental exposure of PII to any other Box users/producers.

What should I do if the eSigned document did not come back into the client's Box Folder?

Access the OneSpan Dashboard to retrieve the signed document at

<u>https://gov.esignlive.com/fpac</u> There are a couple reasons for the document not returning to the client's Box Folder. 1) If a user adds a document to the OneSpan Transaction after integrating with "Send With OneSpan Sign FedRAMP", then the document was never added to the folder and therefore will not return to the Box Folder. 2) The Box Folder the transaction originated from may have been moved or renamed. The folder must not change for the document to return to the original folder.

Who should I contact if I have additional questions or need help?

Please contact your State Assigned Point of Contact for Box + OneSpan. The State POC can contact the *FPAC Service Desk*, DAFO, or OMS for additional assistance.