United States
Department of
Agriculture

FSA Box + OneSpan

USER GUIDE

December 12, 2022, v8

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.

Distributed by the Office of the Deputy Administrator for Field Operations
Farm Service Agency
--Internal Use Only--

Contents

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* folder WILL expose the individual producer's PII to other producers' 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: **Adding a Single Signer to a Document**
2. FSA New OneSpan User Interface Employee Demonstration: **Adding Multiple Signers to a Document**
3. FSA New OneSpan User Interface Employee Demonstration: **Sending Multiple Documents to a Signer**
4. FSA OneSpan for Client Demo: **Signing from a Smart Phone**
5. FSA New OneSpan User Interface Employee Demonstration: **Receiving Documents from a Producer**

NOTE: To access a full list of videos and user guides, please go to the **MyFPAC Box + OneSpan** 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.

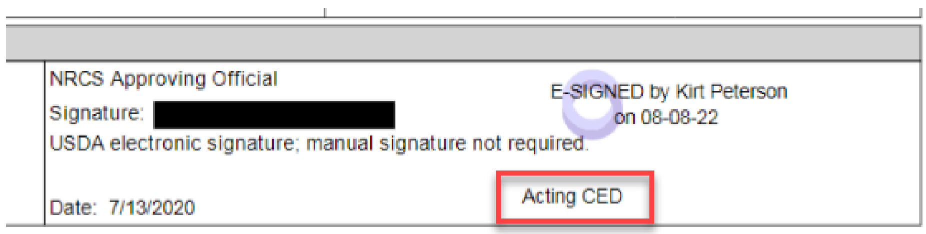
1. **New Users** must **Click Here** OR right click and select "Copy link address" then paste into Chrome browser to activate their "**Send with OneSpan Sign FedRAMP**" account.

   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)

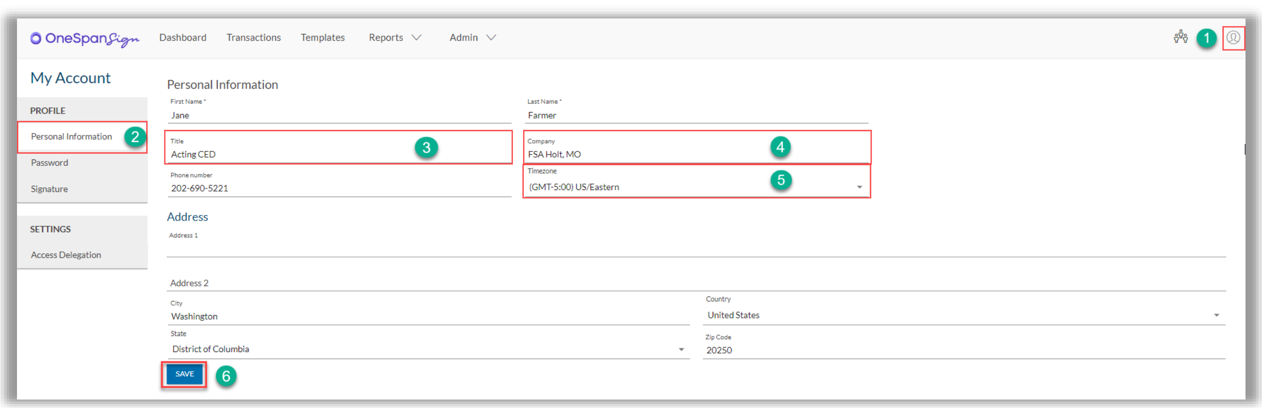
2. *Maintaining **Personal Information** on your OneSpan Account will allow packages to be customized to your transactions and delegated transactions. This is a one-time setup unless you change titles, locations, etc.*

    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.*



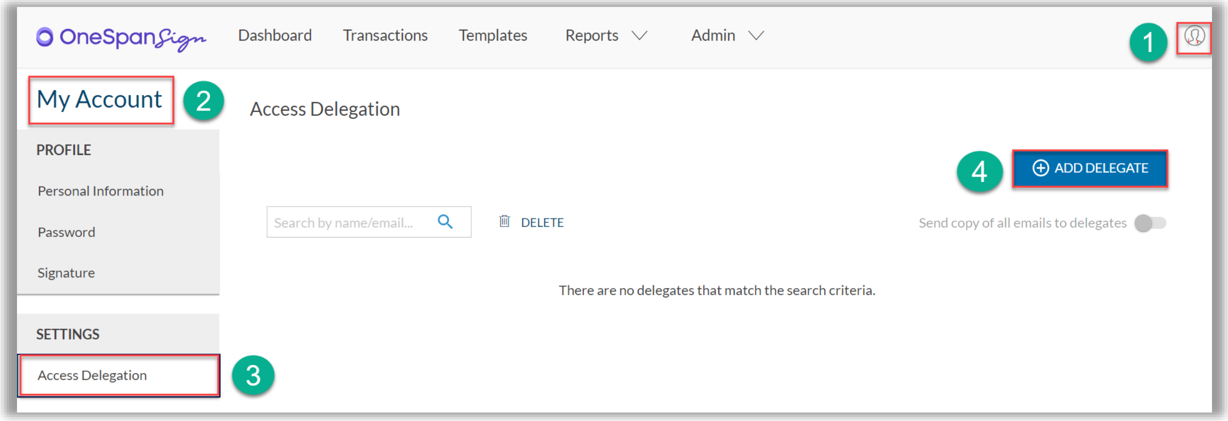
***Example** of an Approved Delegate signing on behalf of an FSA Representative Approving Official.*

    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*



(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.*



***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 https://nrcs.account.box.com/login. 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

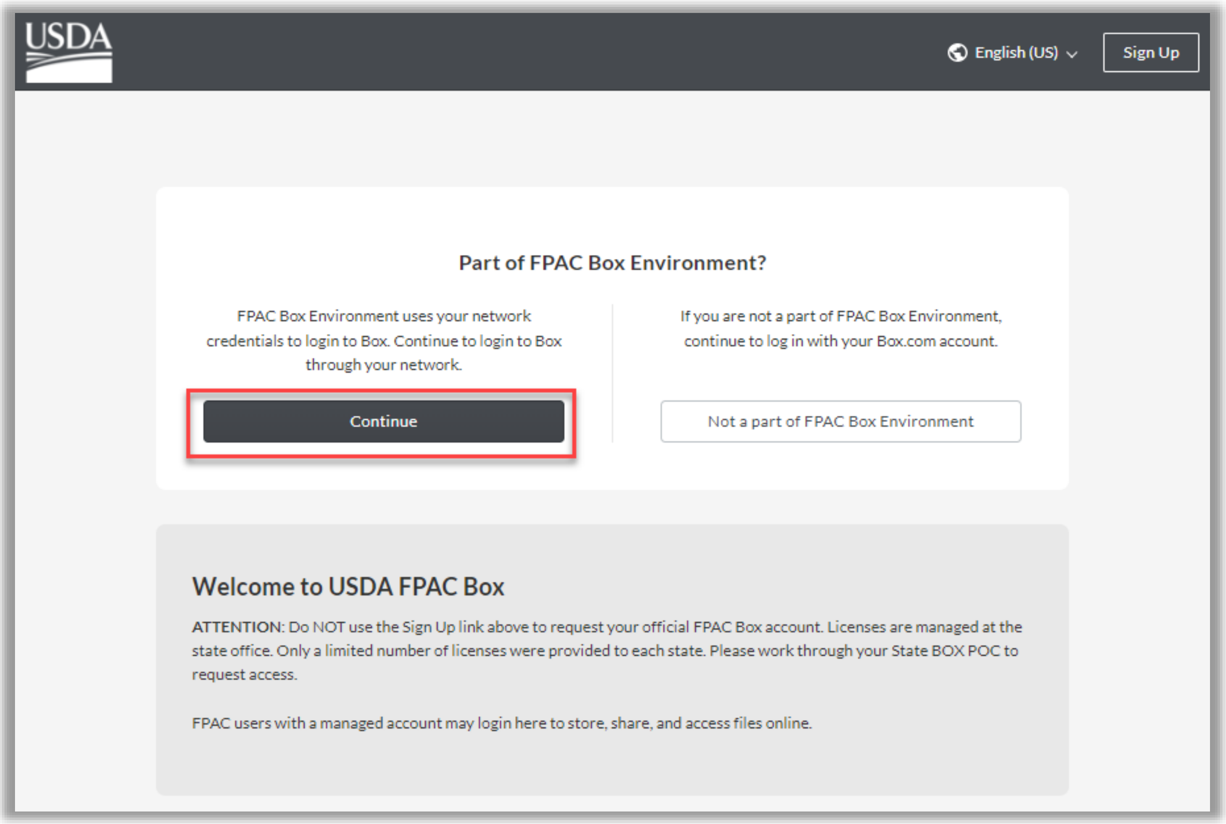
visit the FSA Applications page and select "BOX Login" from the list of available applications.

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.

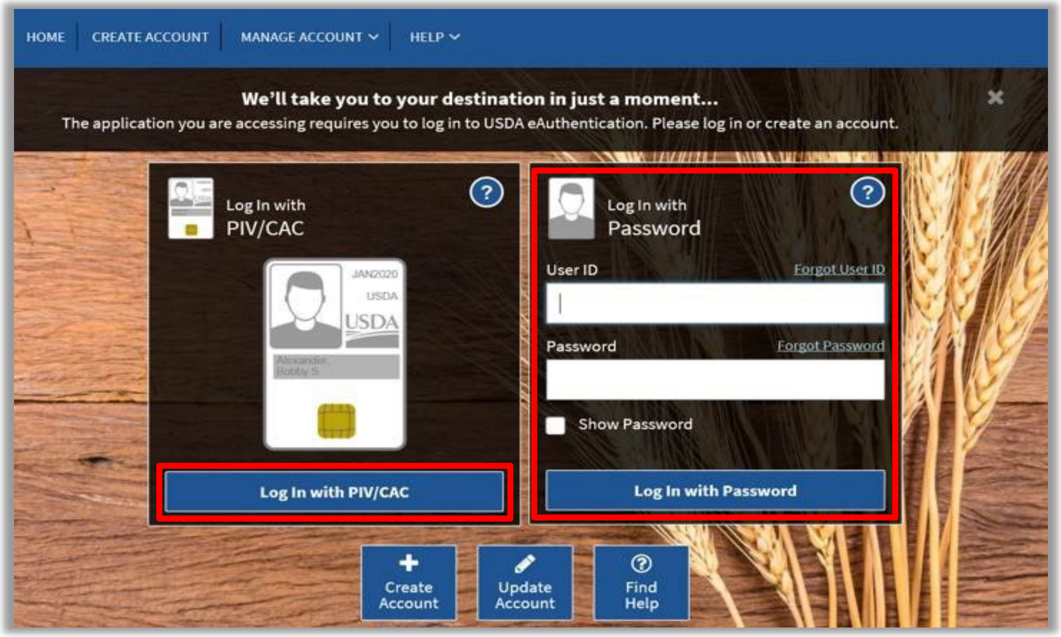


IMPORTANT: Producers **DO NOT** Select “Continue”. If the producer selects “Continue”, the USDA Employees only option, they will enter their personal Box login and password and will receive the “Application Access Denied” from the eAuthentication account manager.

(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.



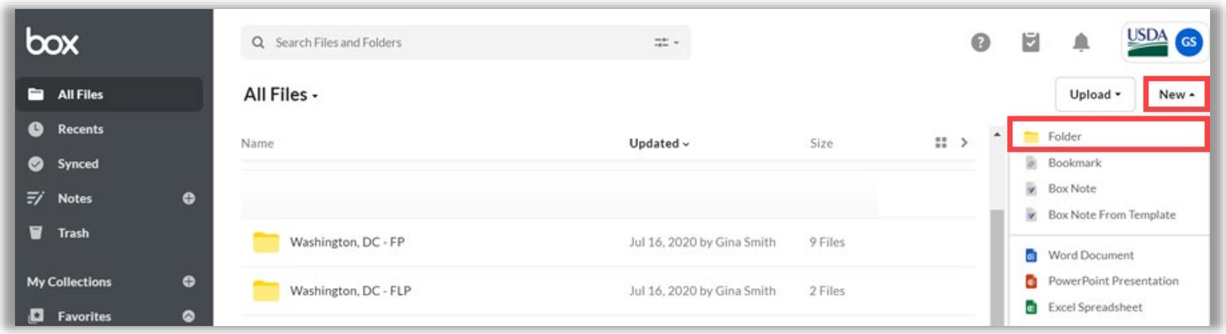
7. For any subsequent visits, employees can access Box at the following URL: https://nrcs.account.box.com/login or the “Box Login” link can be found on the FSA Applications Page**.** Box can be accessed on any computer using your eAuth login. It can be accessed using your Linc Pass at the office, on 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.



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.

3. 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.

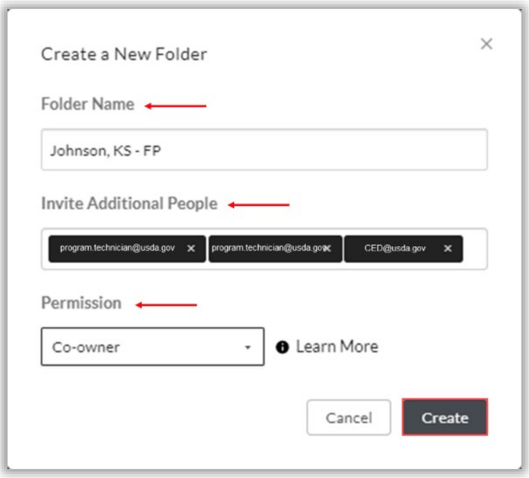
(see next page for continued instructions)

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. ***IMPORTANT***: 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.

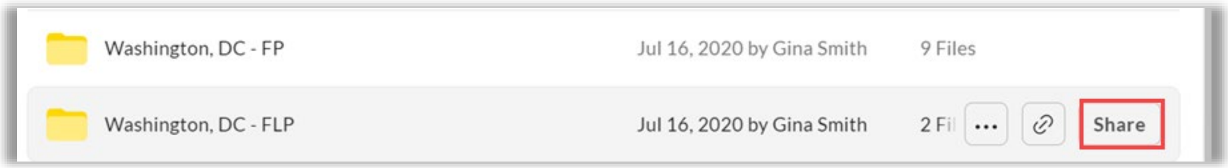


Note: Employees added to this folder will have access to information in this folder AND any folder that is nested within it. They will NOT have access to any folder that has been created *above* this folder.

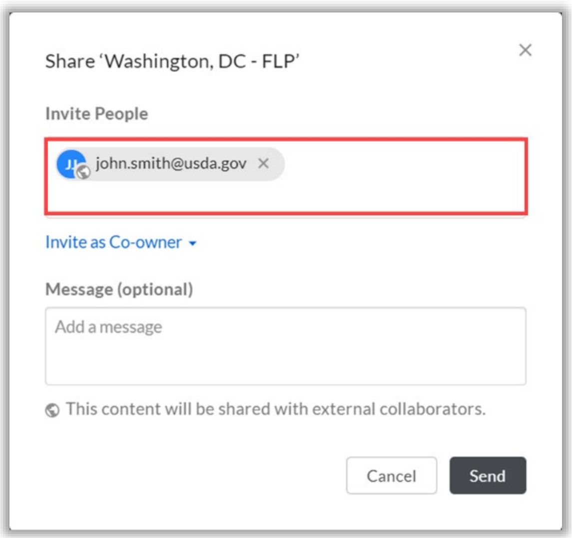
6. Ensure that both a Farm Programs and Farm Loan Programs folder is created for your county by following steps 1-5 above. If you do not work in that area (e.g. a FLM that does not work with Farm Programs), then ask someone in that area to create that folder.

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.**



2. 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.

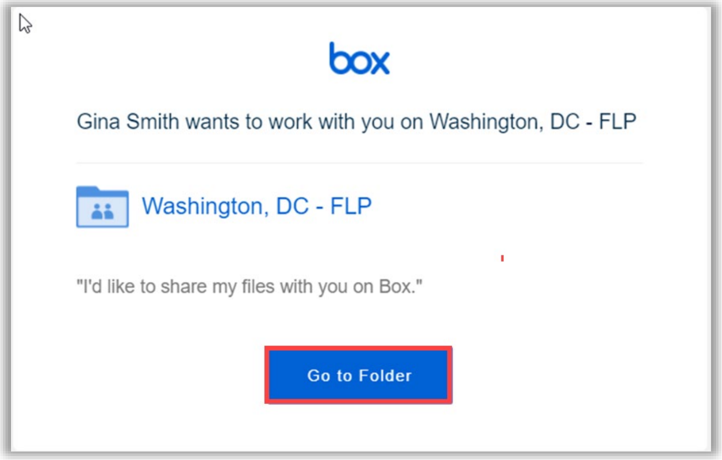


Note: Available options to Invite People: Owner, Co-owner, Editor, Viewer Uploader, Previewer Uploader, Viewer, Previewer, and Uploader.

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.



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.

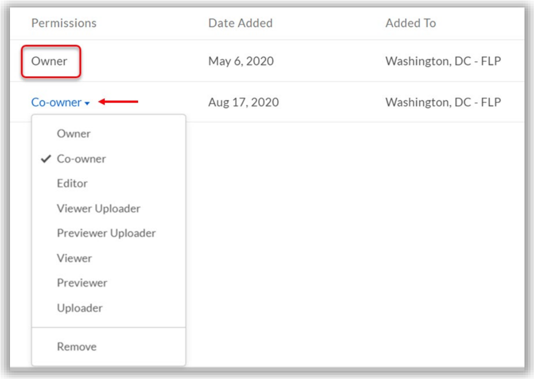
> **Note**: If you are unable to transfer or move a folder because you are not the owner and the owner is no longer an FSA employee, Please contact the ServiceNow Service Desk by submitting a ticket through the FPACNOW Portal. This must be accomplished within 90 days of separation from the agency.

1. 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.



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 (yellow) 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

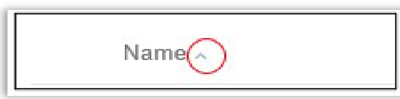
4.1 Creating Individual Producer Folders

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.

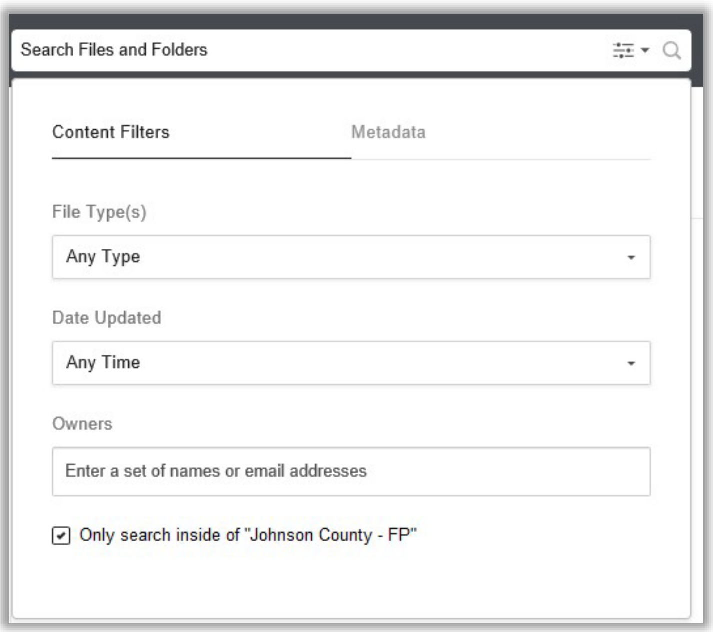
1. Once logged into Box, open the folder you want to create the producer folder in.
   - ***Example***: “**Johnson County, MI – FP**” or “**Johnson County, MI – FLP**”

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. Sort the producer folders alphabetically 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.



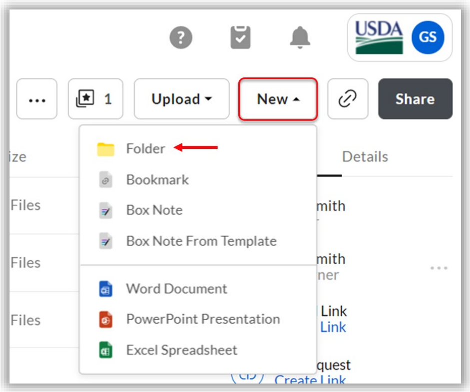
   b. You can also Search for the producer folder to ensure it is not already created for the producer. Type the name of the individual at the top of the screen. It can be a complete name (e.g. “Nathan Sellers”) or a partial name (e.g. “Sell”). Make sure to check the *“Only Search inside of [folder name]”*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



(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.

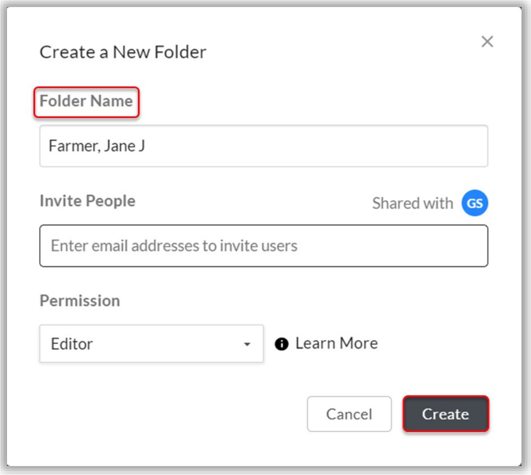
   IMPORTANT: It is **not** necessary to enter a producer's email address in the "Invite Additional People" when creating a new folder if they are only going to sign documents using OneSpan. Box is intended to share files and documents securely requiring a pen and ink original signature. *It can also be 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 Section 3.3.

(see next page for screenshot and continued instructions)



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: https://support.box.com/hc/en-us/articles/360044196413-Understanding-CollaboratorPermission-Levels

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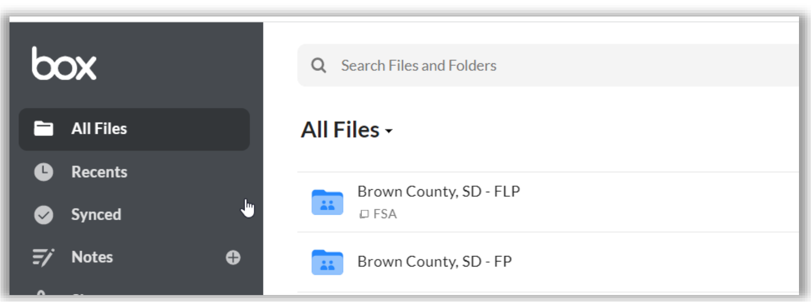
4.2 Creating Program Level Electronic File Folders

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: https://myfpac.usda.gov/special-topics/digital-records/index.html*

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.*



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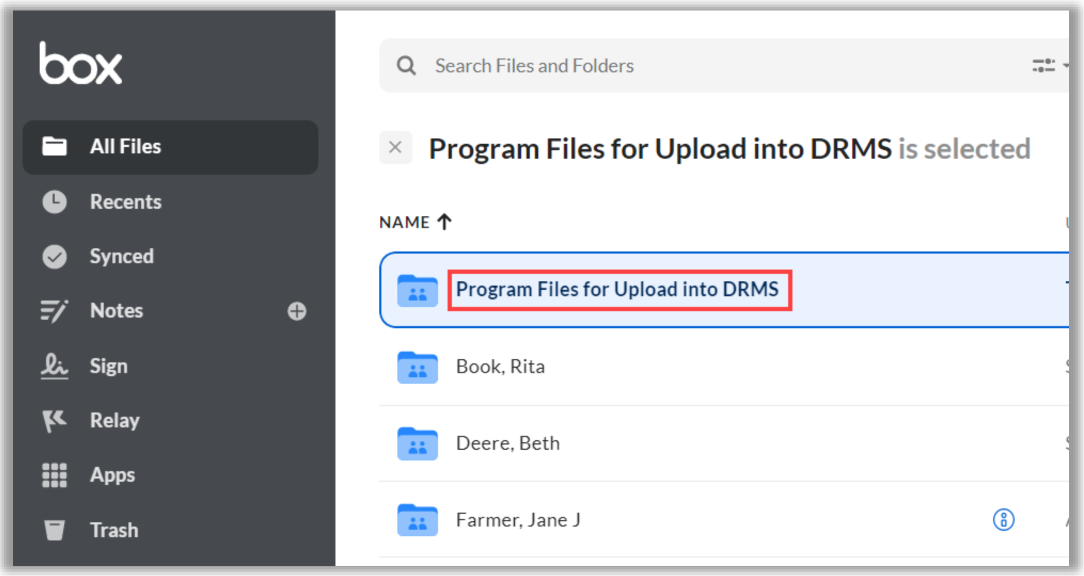
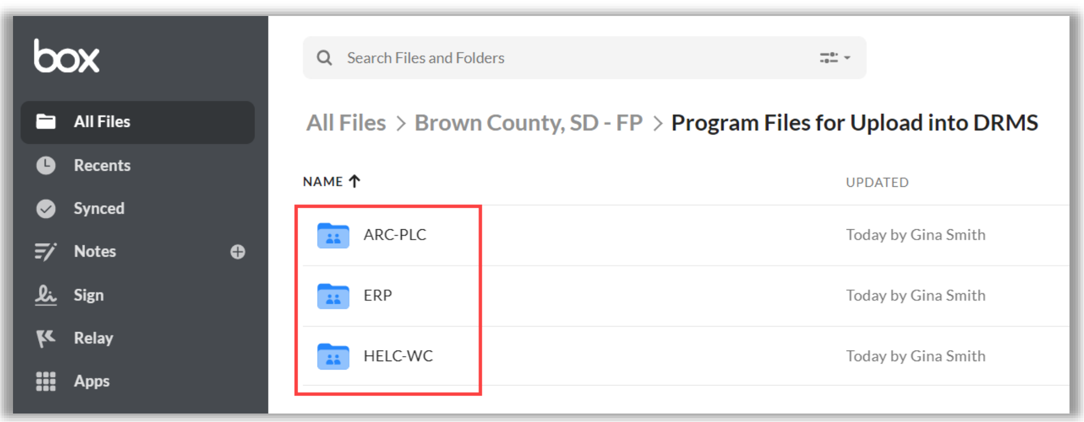
2. ***Create*** *a subfolder titled "Program Files for Upload into DRMS"*



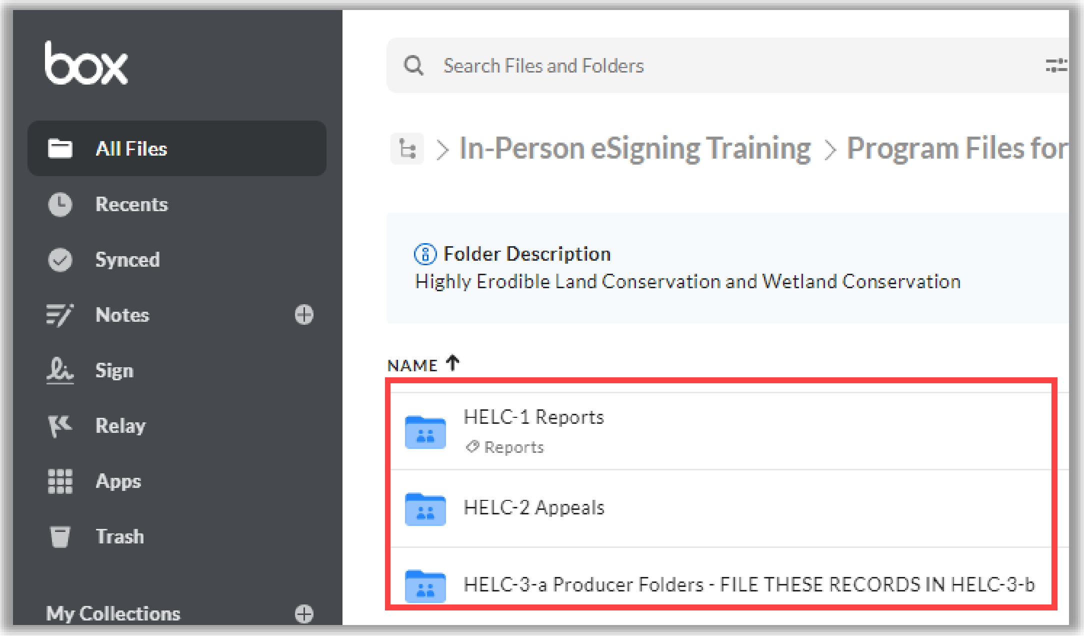
3. ***Create*** *a sub folder for the program files you plan on storing temporarily in Box until the DRMS application is available for upload. Please follow Handbook 32-AS, paragraph 87.*



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%2D9695%2D4a6ce5b7e7ac&id=%2Fsites%2FFBC%2DRecMS%2DPublic%2Frmlibrary%2F32%2DAS%20Supplement%20%2D%20FSA%20File%20Maintenance%20Disposition%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*

l ***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.*

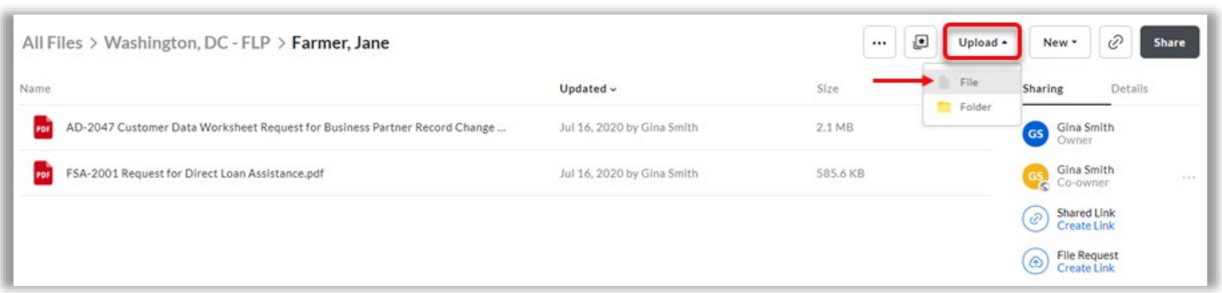
***Examples**: 071 **or** Manitowoc*

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.

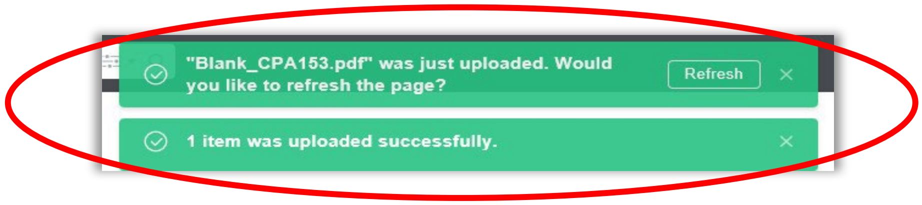
5. Click **Open** or **Upload**. Producers added to the folder as a collaborator will be notified immediately by email when documents are uploaded. (For a step-by-step from the producer's perspective, see Section 5.1)

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".

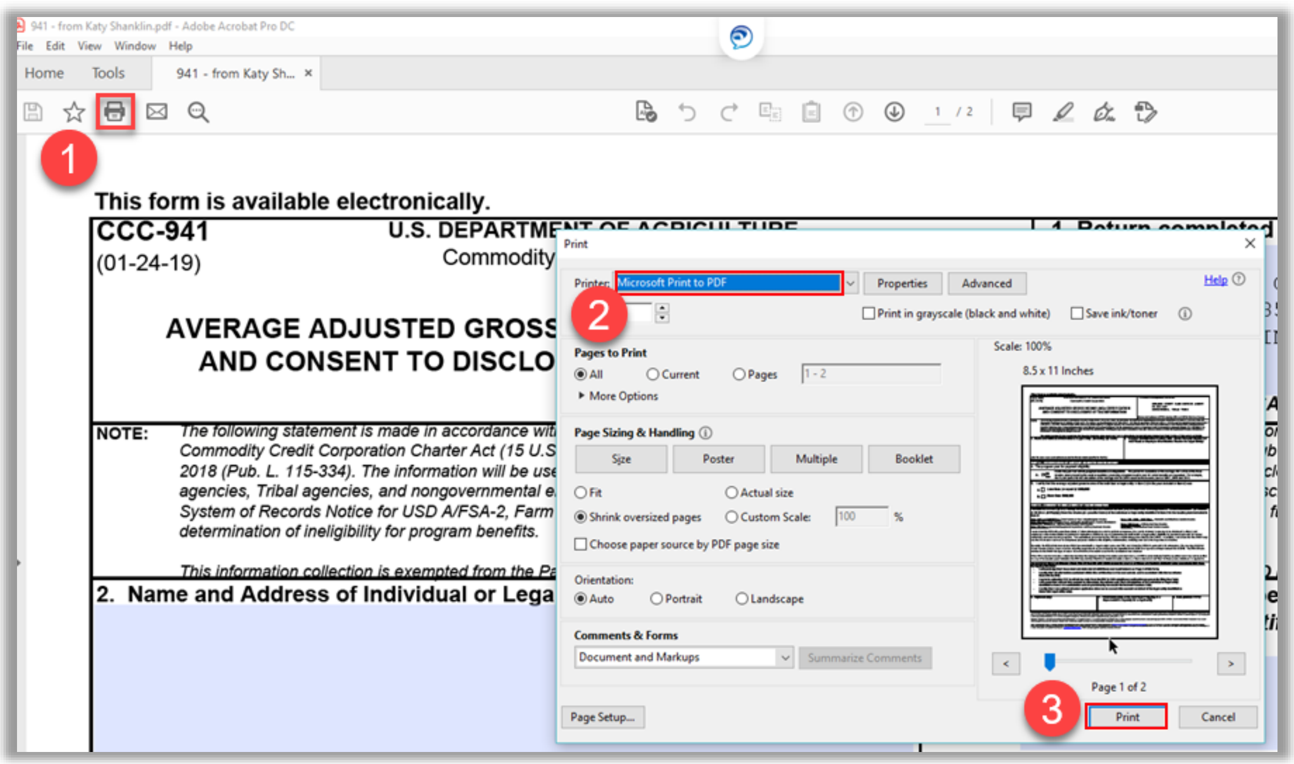


6. Box will show a notification when documents are successfully uploaded. To see the file in the folder, you may need to refresh the page.

(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.

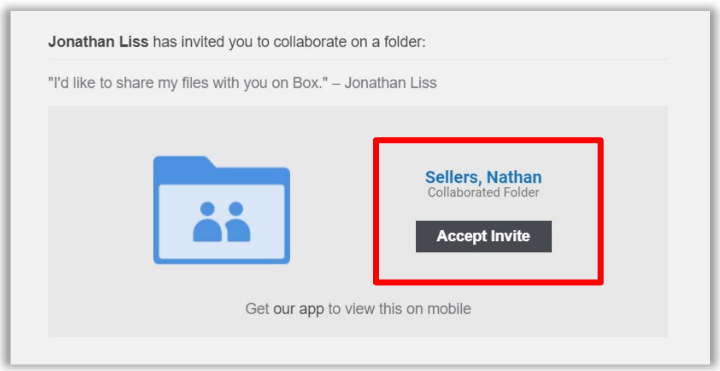
5.1 Workflow for Producer Receiving Shared Documents

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.



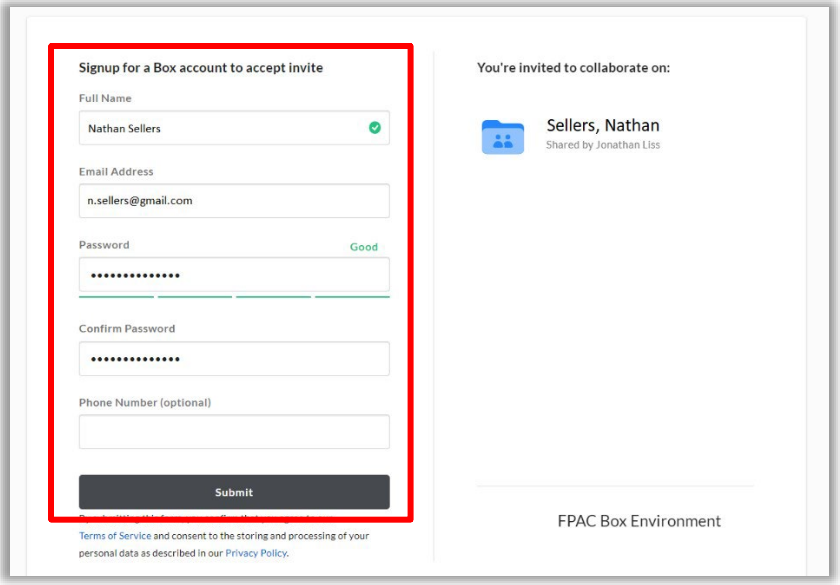
   a. If the producer does not have a Box account, they must register, at a minimum, a free Box account with the email address entered in the invite by the employee.

   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)



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:

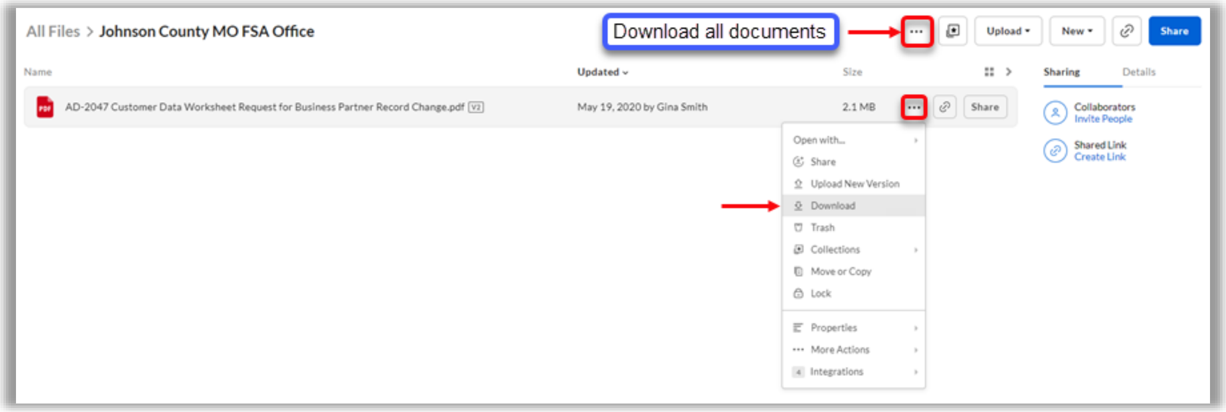
   a. View document (if a document has been uploaded already by an employee)

   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)

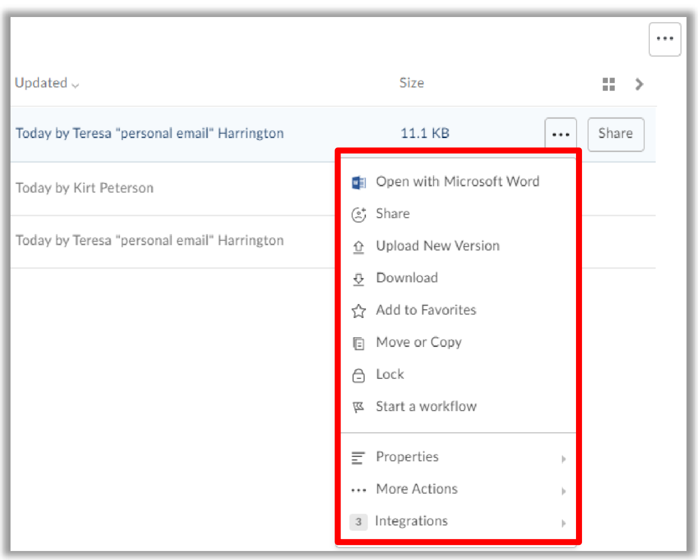


6. They will then need to perform the required task to the document, such as filling it out (either on the computer or after it is printed). They can also download the document to then print.

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 Section 4.2.

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:



(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

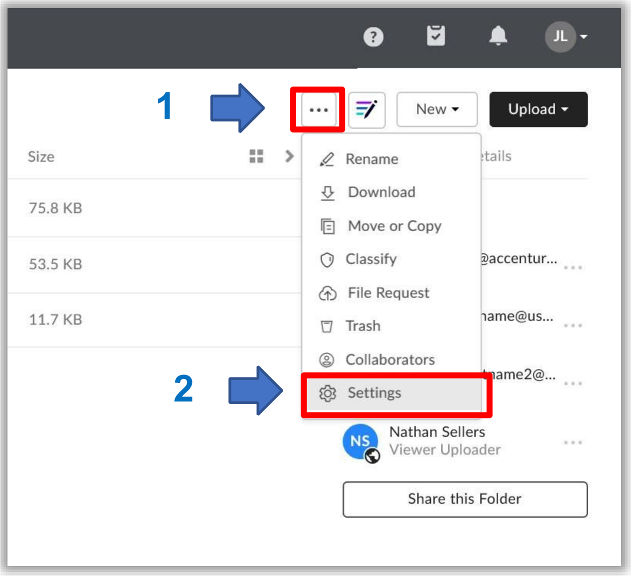
11. The employee uploads the signed document into the producer's folder.

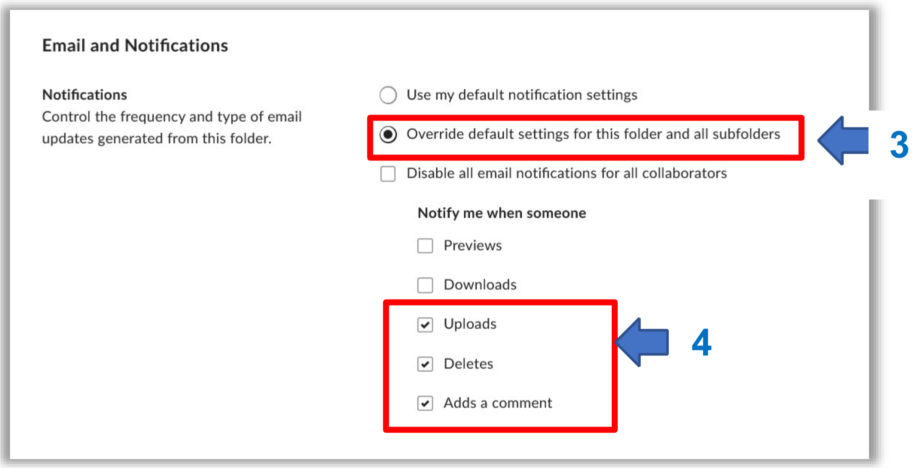
12. The employee should alert the producer that the document has been uploaded since the default setting is no notifications will be provided. However, see the note below on how either the producer or employee can enable email alerts for new document uploads.

    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)

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.

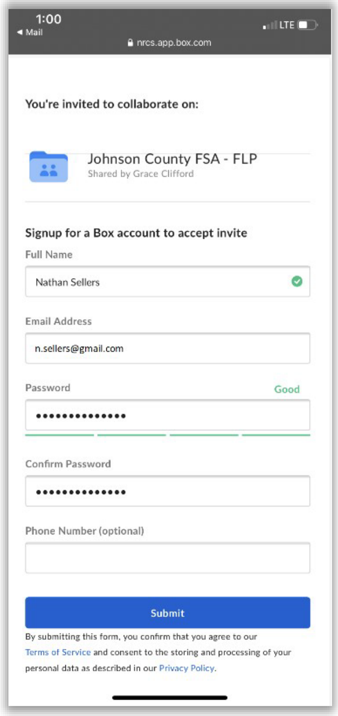
14. The producer then uploads the signed document back to the Box folder.

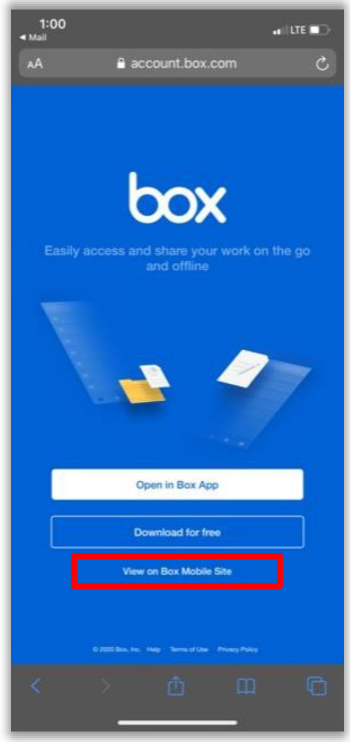
15. The employee receives an email notification of the new document submission (if email alerts are turned on) and reviews/re-files/stores it as directed by policy.

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.

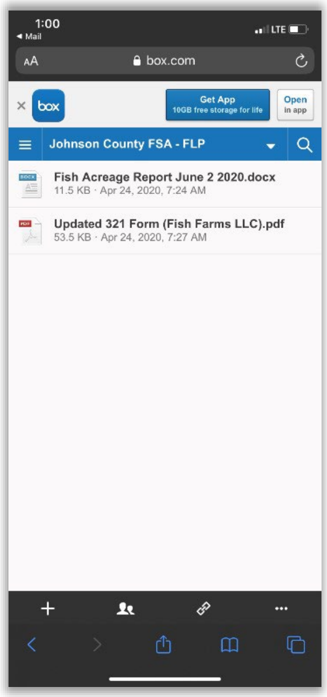
5.2 Mobile Box Access Workflow

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.**



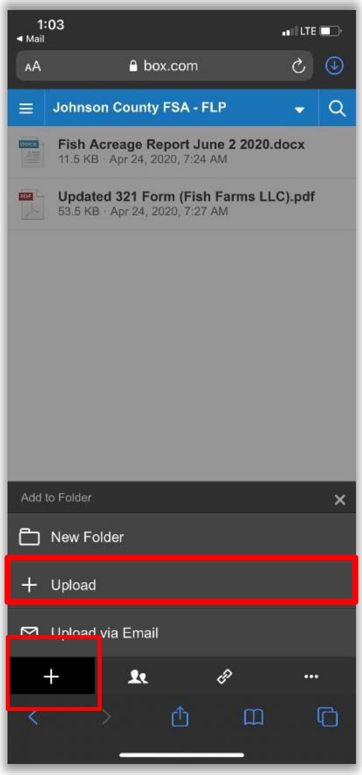
2. Producers can view, download, and upload documents via the Box mobile website:

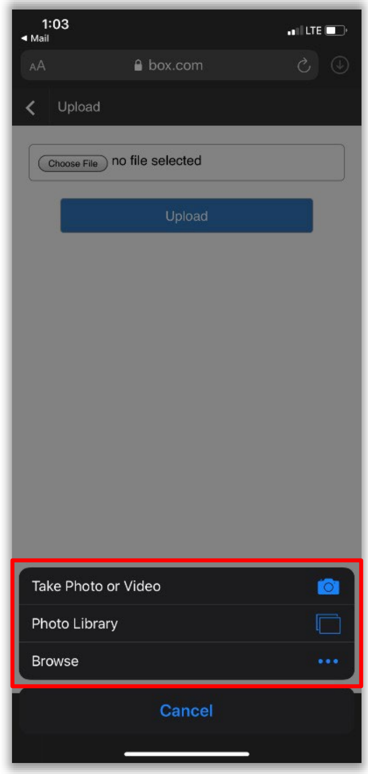
    a. Viewing documents: tap the document to open it

    b. Downloading documents to a smartphone: tap the document to open it, click the downward arrow at the bottom of the screen, then click **Download**.

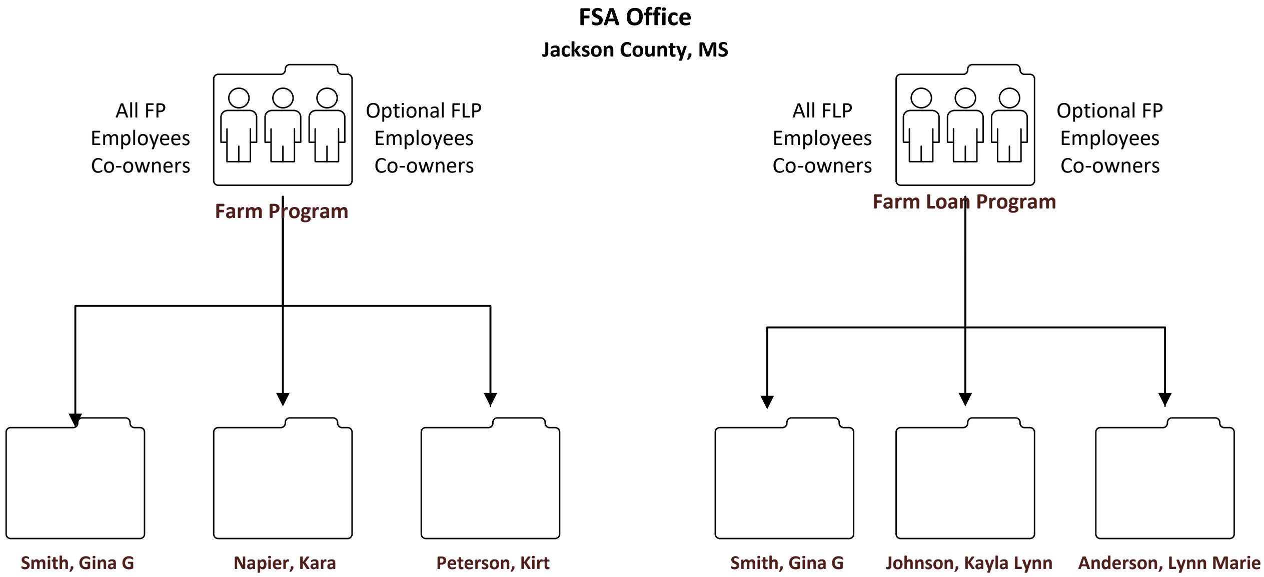
(continues next page)

c. Uploading documents from a smartphone: 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

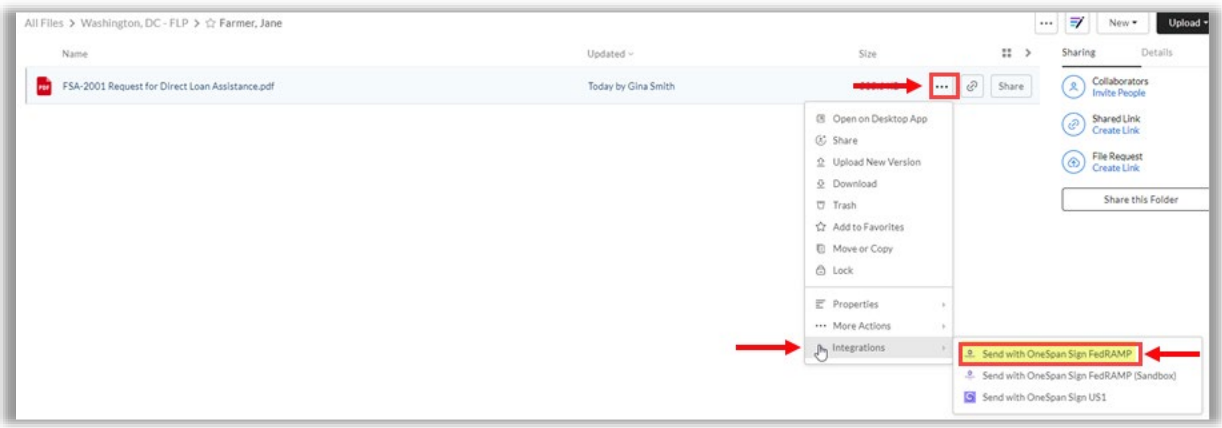
All employees are required to go through Box to get to OneSpan. Box allows USDA to protect a producers PII and allows all employees associated to the county folder to handle and track the progress of incoming documents. This is very effective for employees in-office or remote; as well as, out of office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

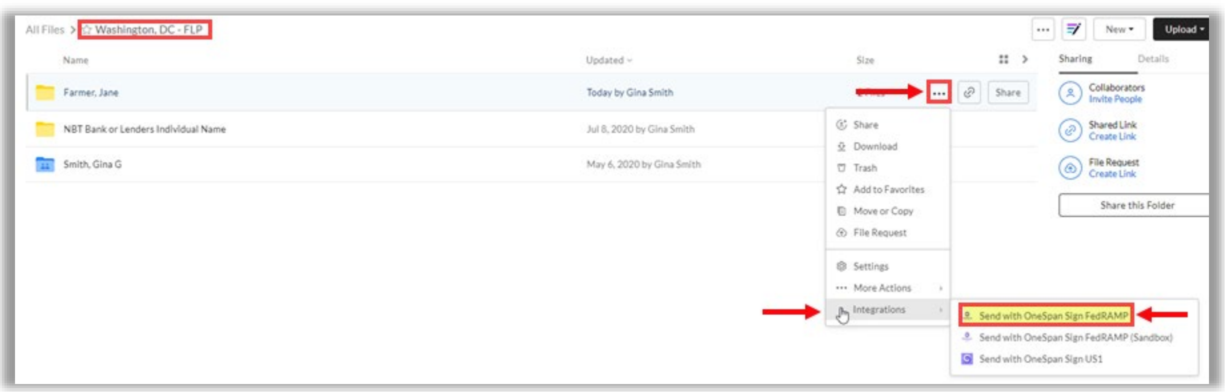
7.1 Create a New Package *for eSigning and In-Person eSigning.*

1. Hover over the **uploaded file** OR the **producer file folder**, Left Click the '**More Options**' … 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:



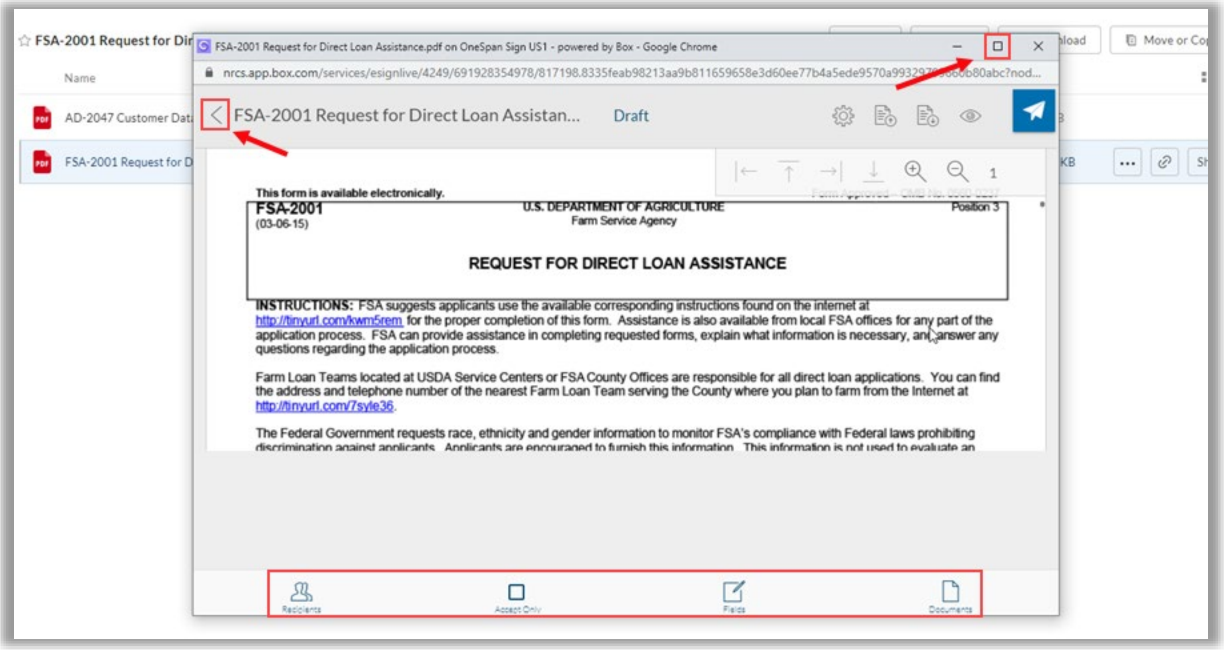
   b. Example: **Multiple** Uploaded Files from the producer file folder:



(see next page for continued instructions)

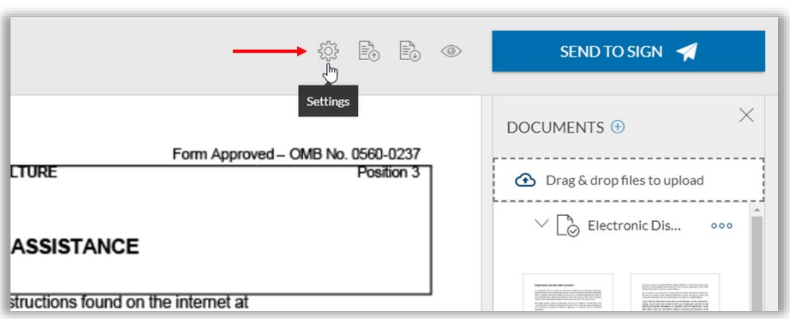
c. The selected file(s) will display as a "Draft" in a separate popup window. **Click** on the **maximize** button in the top right corner to begin adding recipients.

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



> **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.*

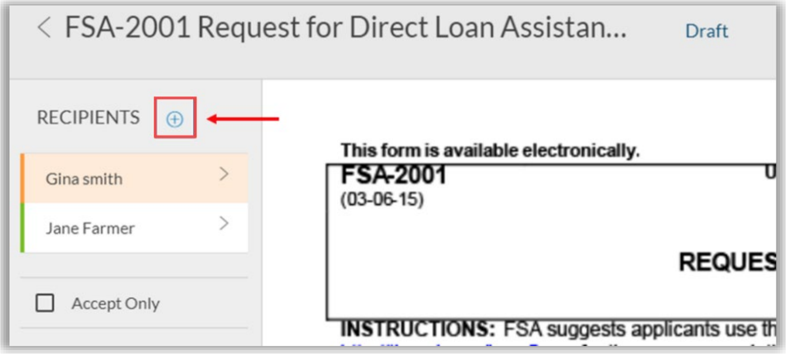
d. **Click** on the "**Settings**" icon to update the Transactions Settings for the individual transaction.



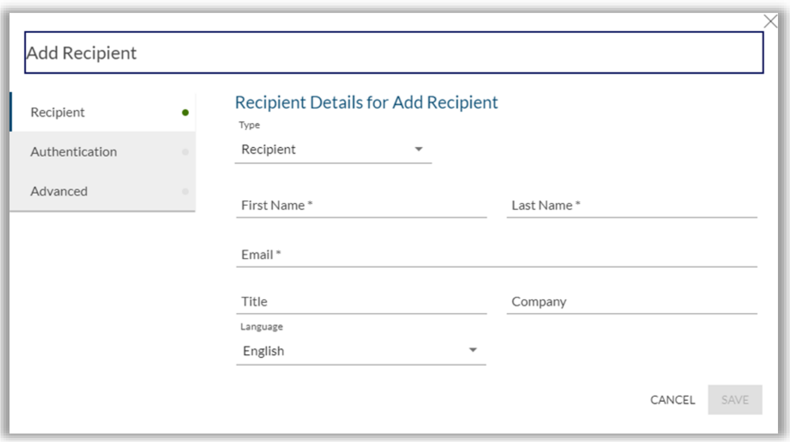
> **Note**: The "Transaction Settings" box will pop up to allow the Name, Description, Time Zone (Default is Eastern), Email Reminders, Expiration, and Font Size for the individual transaction can be modified.

(see next page for continued instructions)

2. ***E-Signing** a document or documents (from email),* **Click** on ⊕ 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.



   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.

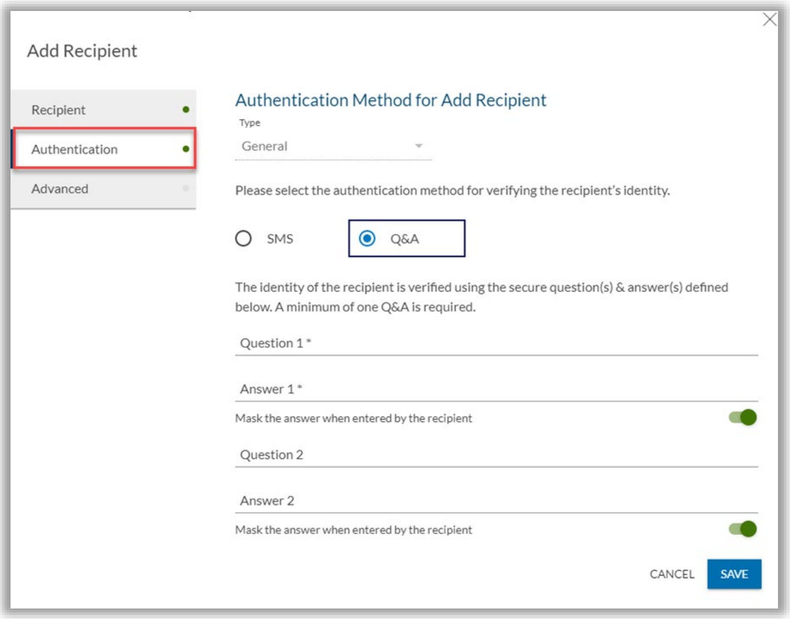


      IMPORTANT: Verify you have entered the correct Recipient Details, especially the email address!

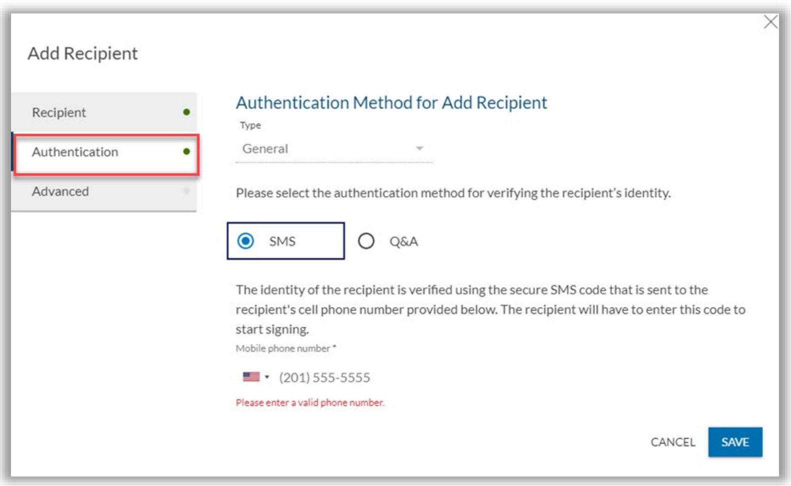
   b. On the “**Authentication**” tab you must select the Q&A or SMS for the 2 Factor Authentication method:

      - **Q&A** – Enter a question and answer the producer will be able to answer.

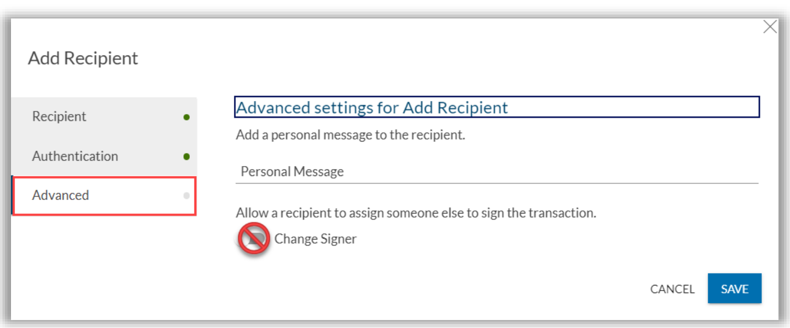
(see next page for screenshot and continued instructions)



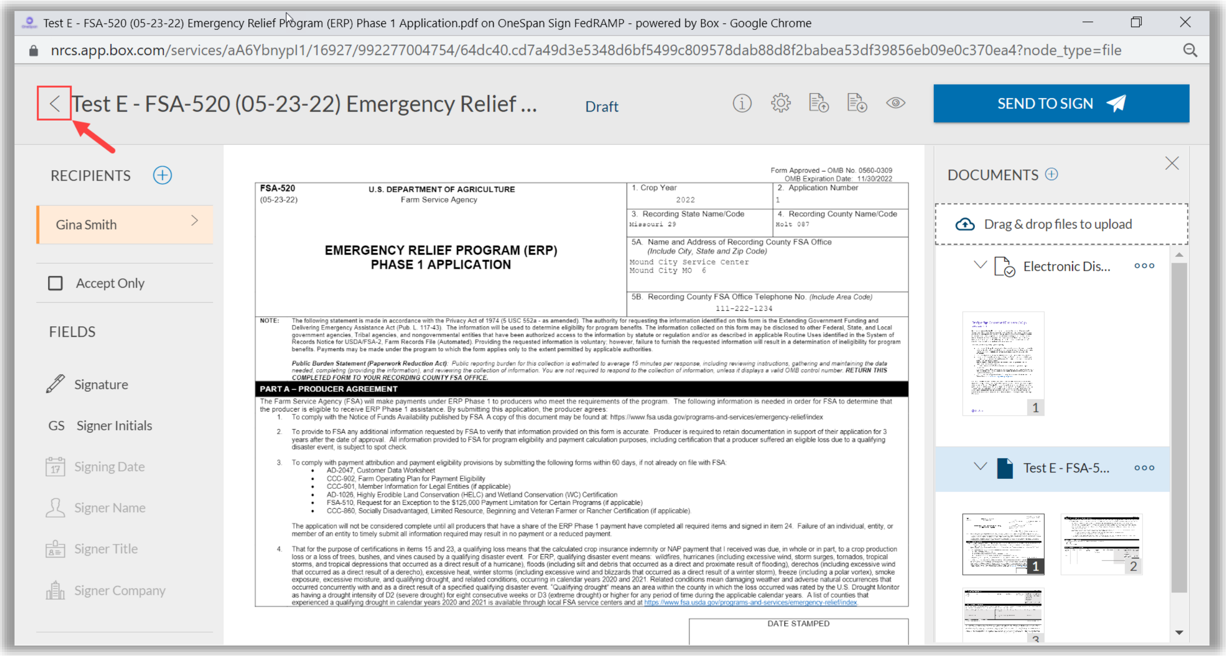
- **SMS** – Sends a text message to the producer's smart phone number with a code.



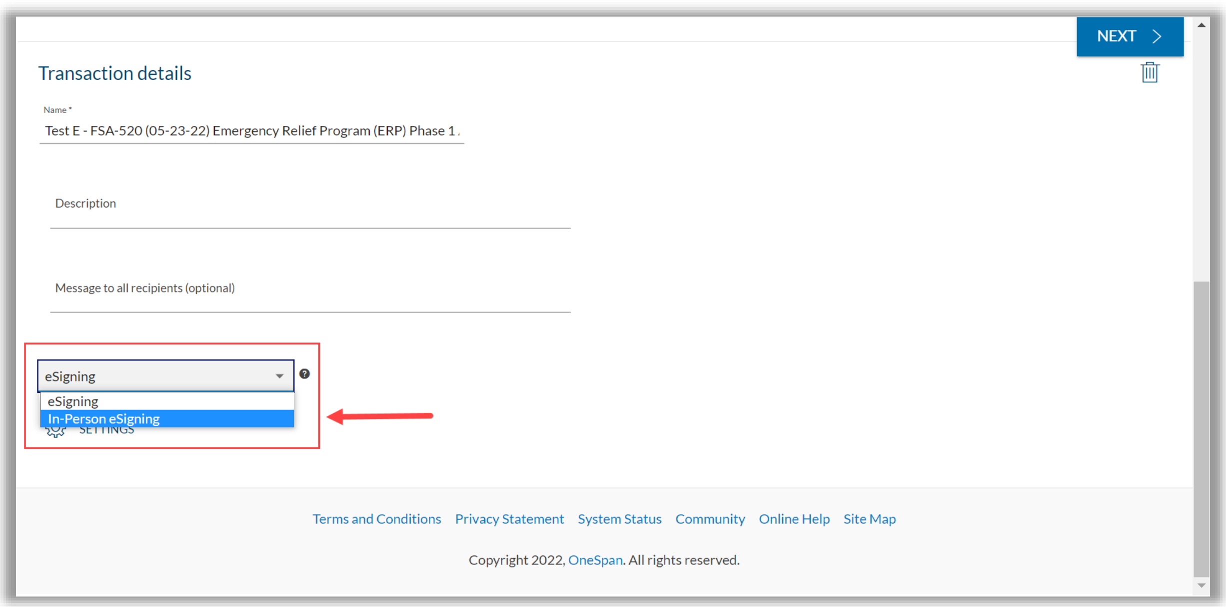
c. *On the "**Advanced**" tab for the selected Recipient allows you to enter a "Personal Message" to the individual recipient.*



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.*

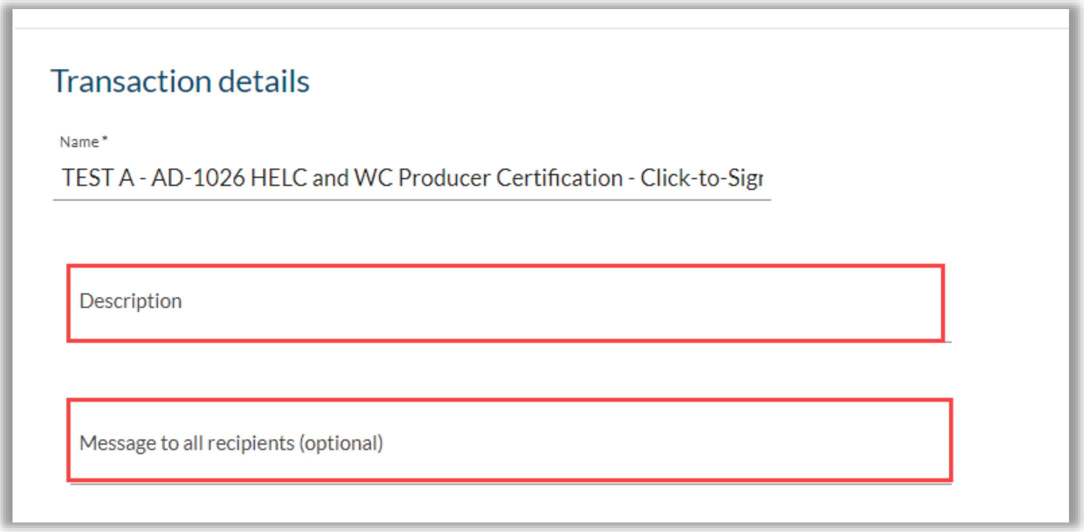


a. *Scroll down the page to the "Transaction details" section. **Click** the downward arrow next to the **eSigning** field to change the default to **In-Person eSigning.***



(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).*



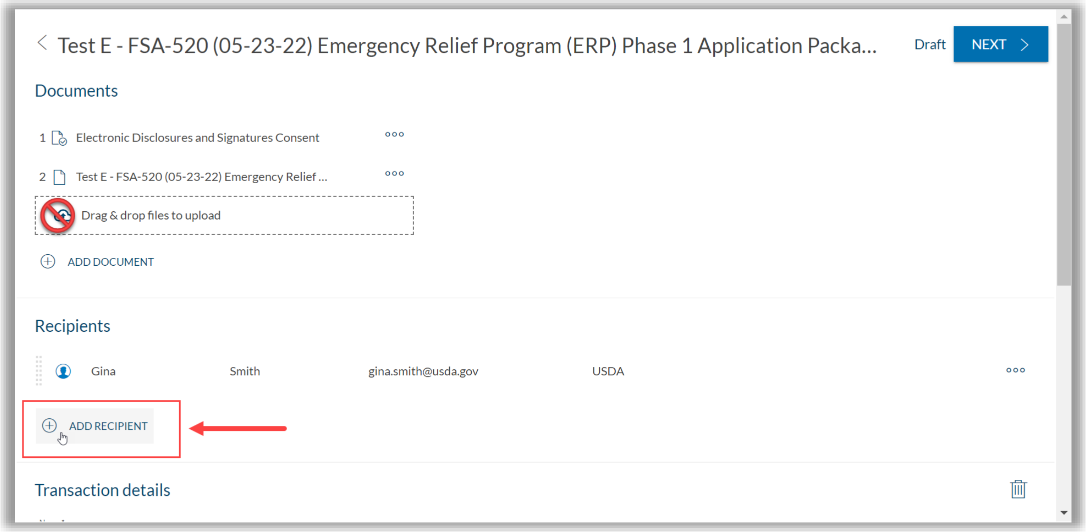
c. *Scroll to the "****Recipients****" section.* ***Click*** *on* *to the left of "****Add Recipient****" to add a producer. Enter the required information marked by an asterisk. You will receive an error message if you fail to enter the required data.* ***BEST PRACTICE*** *is to add as many Recipients 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***

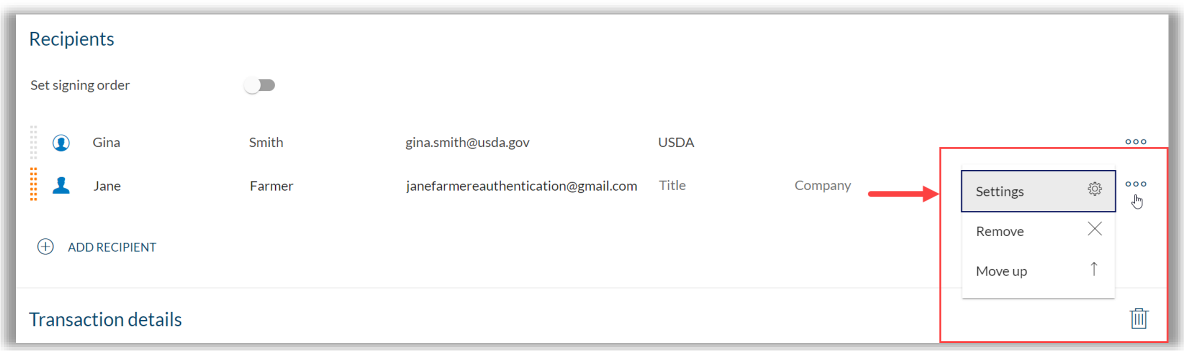
> ***IMPORTANT****: The FPAC FSA Universal Email Address account is not being monitored for questions. It is only to be used for the OneSpan Recipient email address field when a customer,* ***NOT*** *an employee, is in-person at the service center and does* ***NOT*** *have an email address.*

(see next page for screenshot and continued instructions)



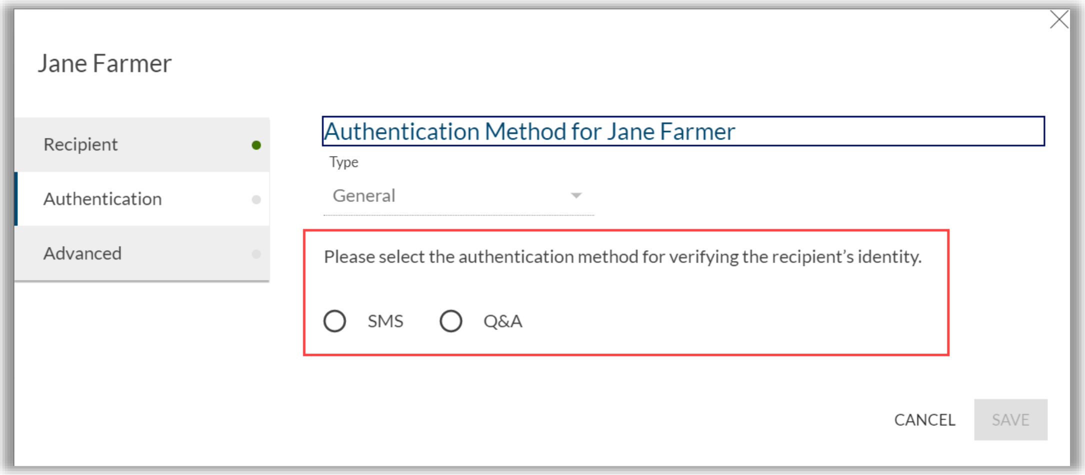
IMPORTANT: ***DO NOT*** *drag & drop files to upload! Doing so will not allow the document(s) added to return to the box folder once the signing ceremony is complete. You must either finish this transaction or go back to the folder in Box to add document(s)and start the process over.*

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

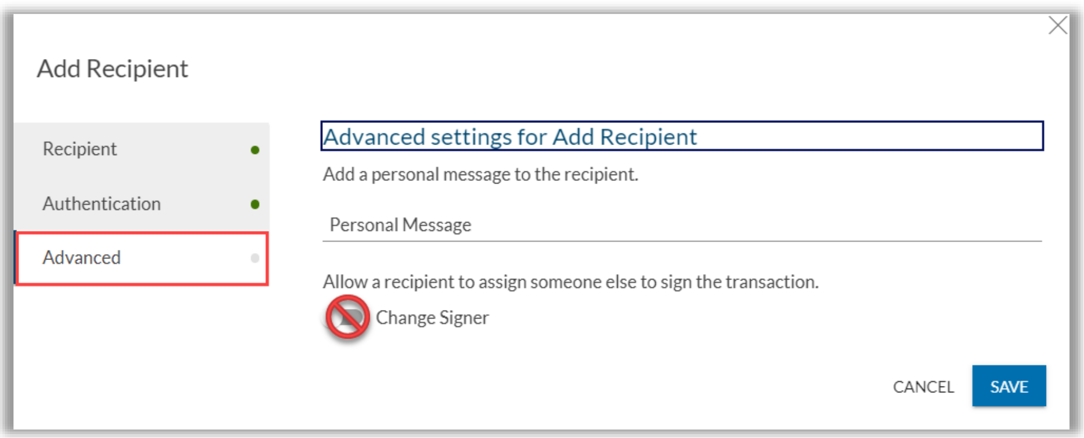


(see next page for continued instructions)

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.*



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



(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.*

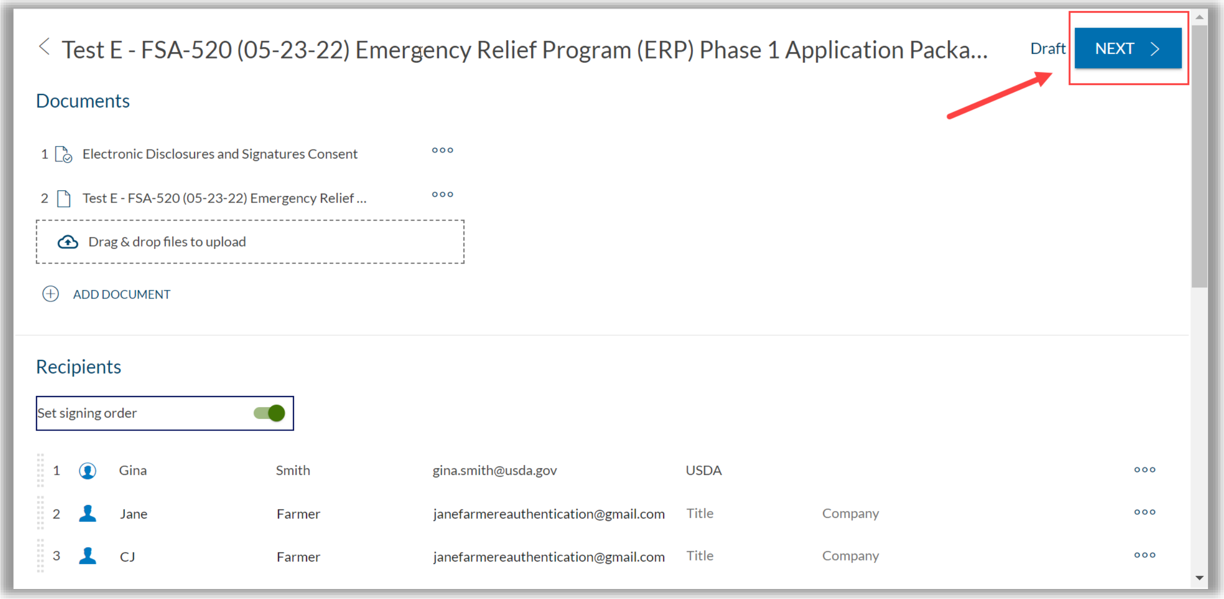
A signer with a signing order 1 means that recipient will sign first. Hence, a signer with a given signing order can participate only after all signers with lower signing orders have completed signing. Also, two signers with the same signing order can sign documents simultaneously. Furthermore, the second 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.

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)

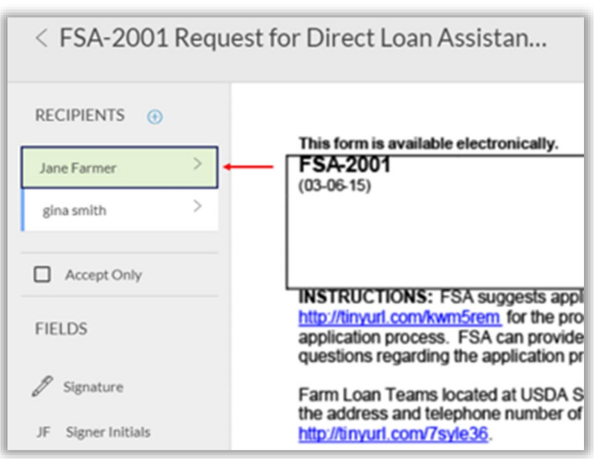
i. **Click** on the "***NEXT***" *icon once all recipients and the signing order has been set, if applicable. This will take you back to the document(s) to add signature blocks.*



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.

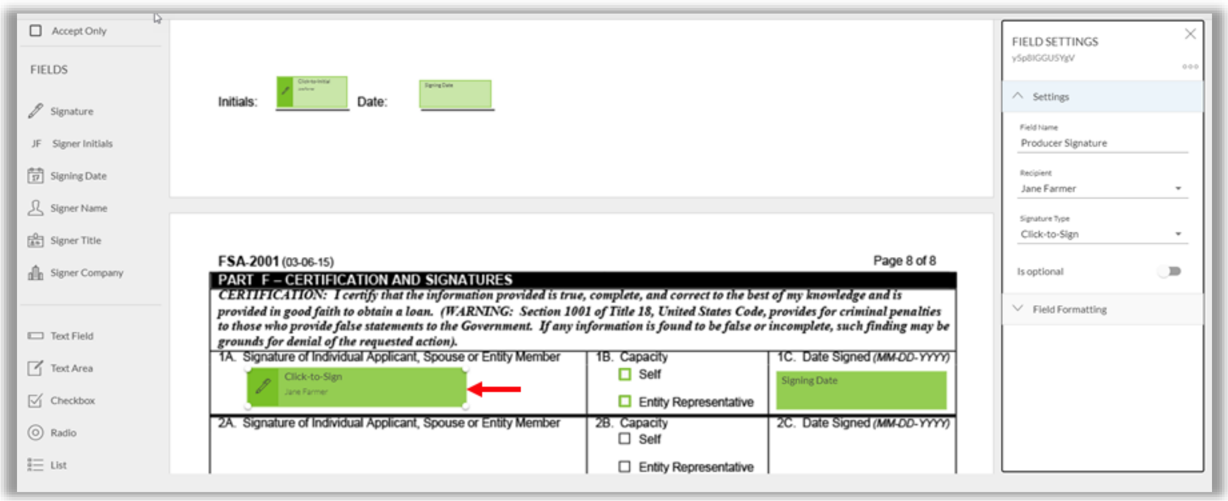


(see next page for continued instructions)

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.

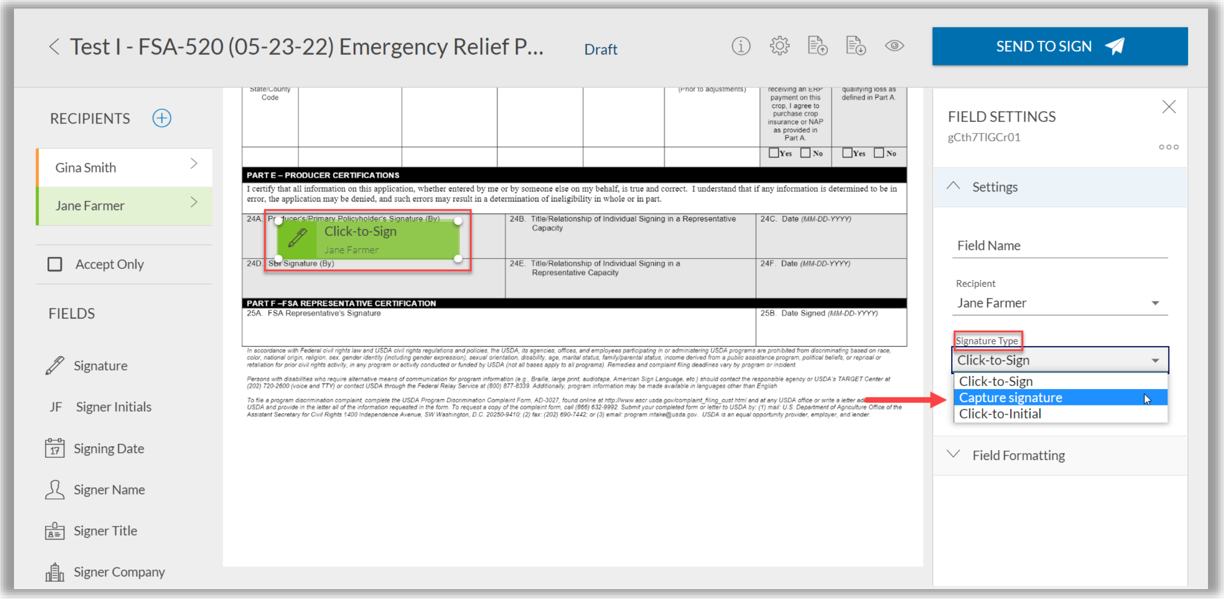
Note: The "**Signing Date**" is **optional**. The Date will display within the Producer's Signature Block after the producer digitally signs.



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.*

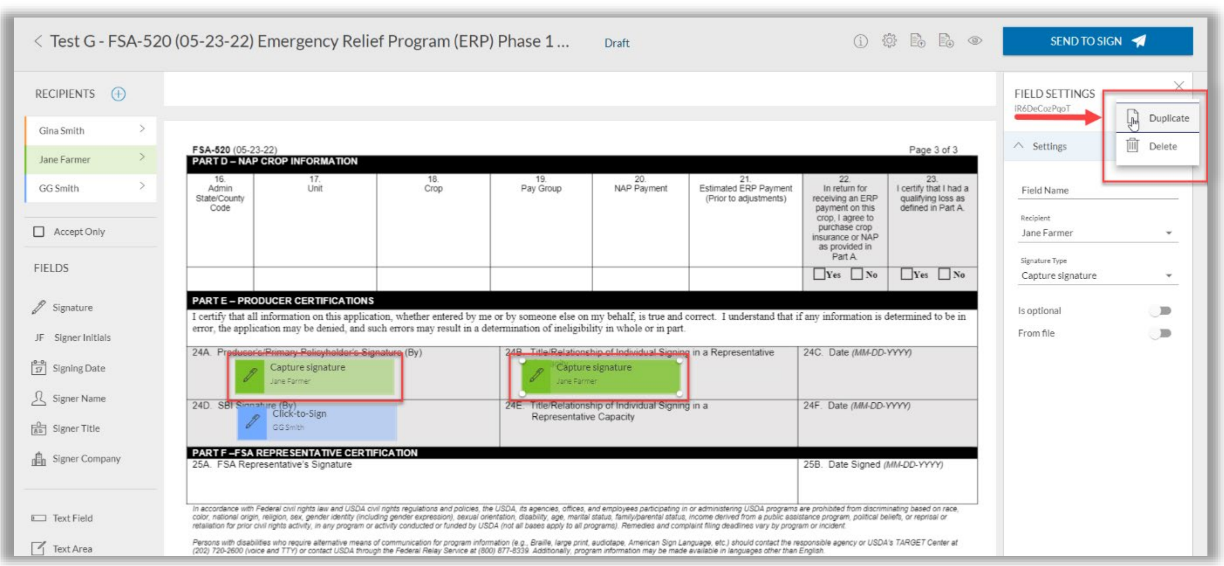
(see next page for continued instructions)

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".*



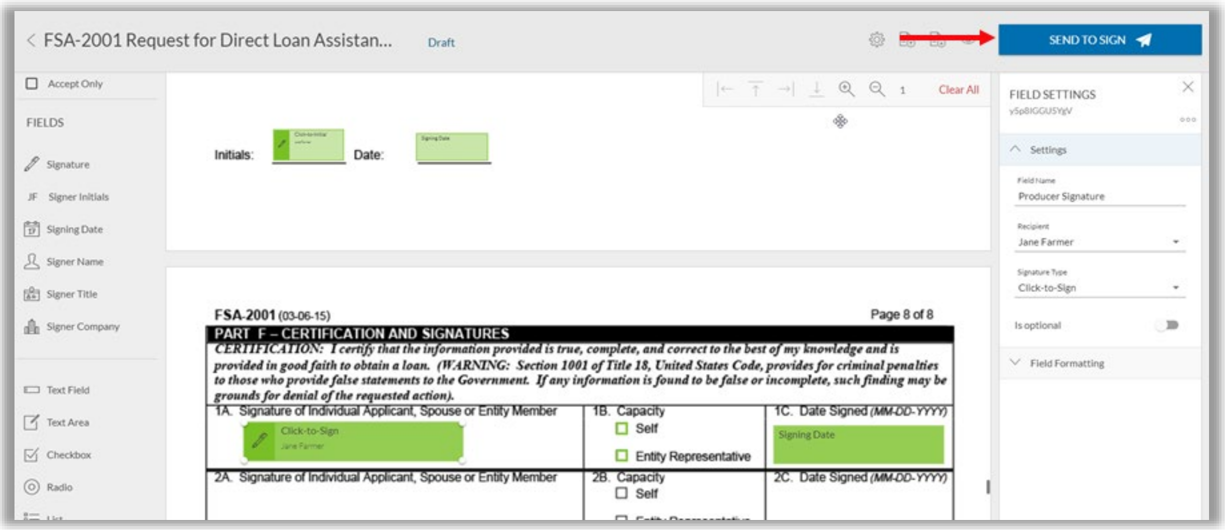
d. *Once you have the stamp(s) added to the document and made the necessary edits, you will see the "**FIELD SETTINGS**" box on the right hand of the page. **Click** on the "**More Options**" (3 dots) and you will see a dropdown list of **Duplicate** and **Delete**.*

*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.*



(see next page for continued instructions)

5. 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.



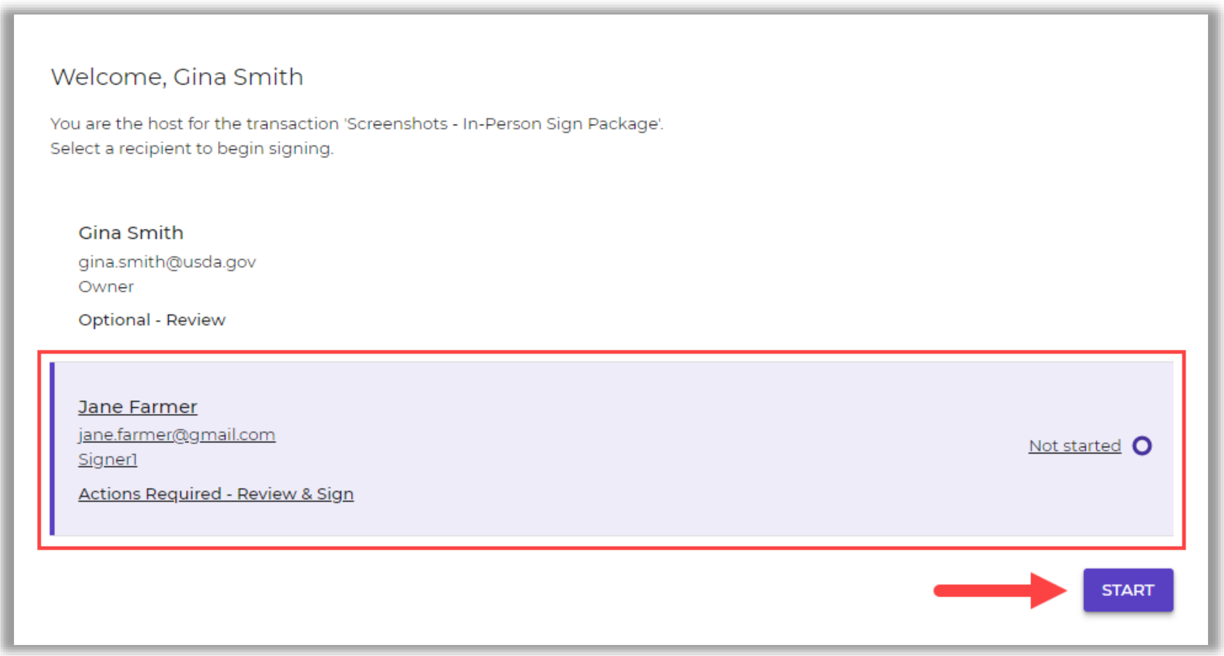
Complete! You have now sent a package for digital signature to your producer(s).

7.2 Conducting an In-Person eSigning Session

*With OneSpan Sign, transaction owners can send documents for signatures and let recipients e-sign 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.*

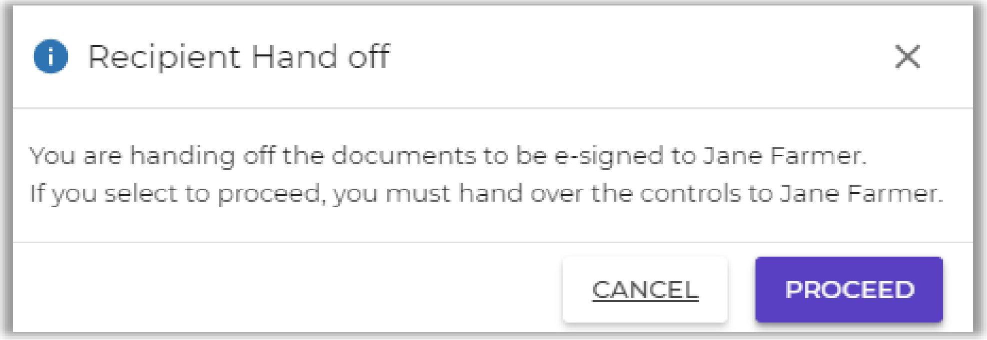
1. *After clicking "**SEND TO SIGN**", OneSpan will automatically generate an email to all producer(s) added to the package. An **In-Person eSigning** confirmation message will appear, **Click** on "**YES**" to continue. **Note**: No signing action required for the email sent to the producer signing in person.*

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

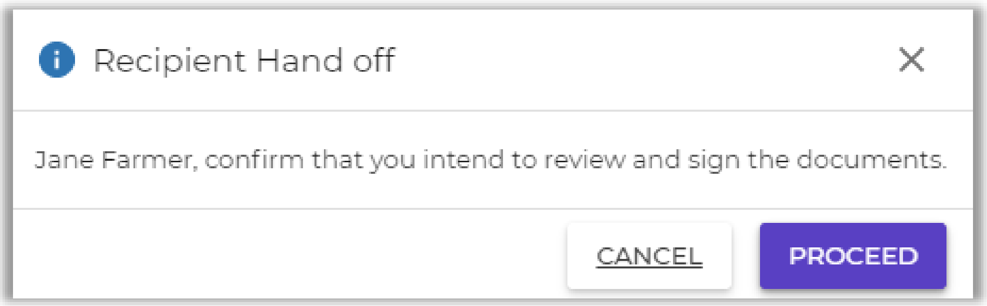


(see next page for continued instructions)

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

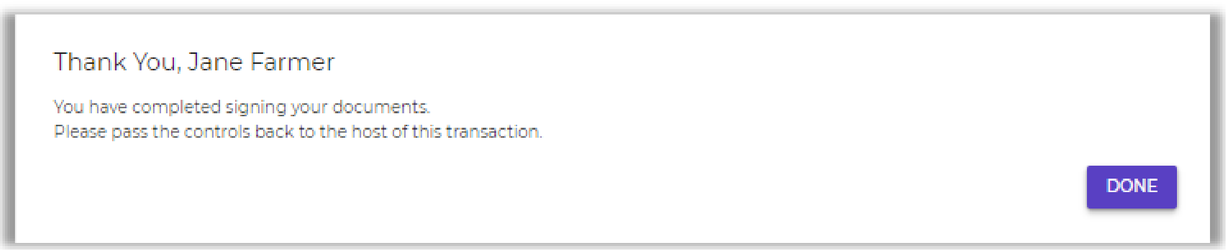


c. ***PRODUCER RESPONSIBILITY: Click** on the “**PROCEED**” icon to confirm the mouse has been handed off to review and e-sign documents*.



*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.*

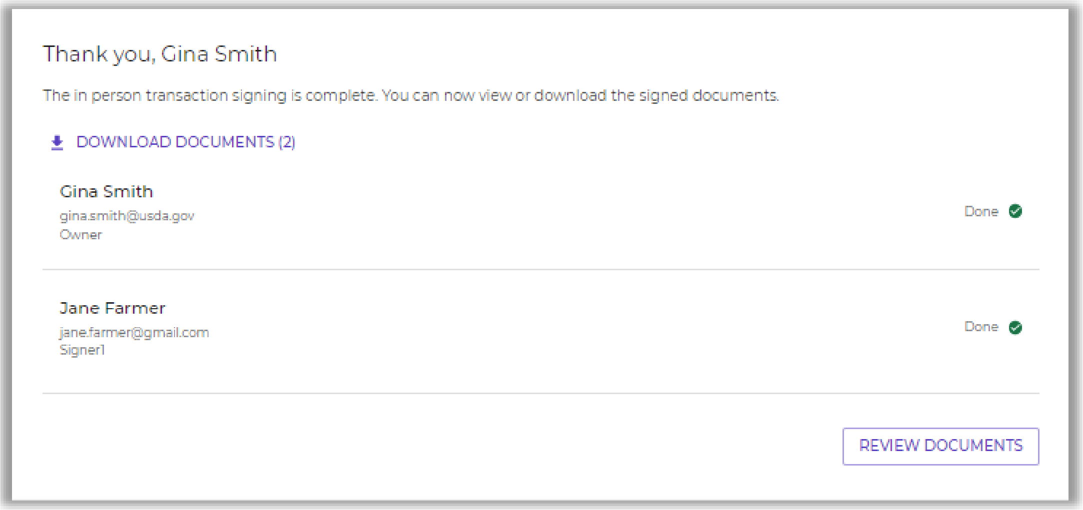


e. ***EMPLOYEE RESPONSIBILITY: Click** on the “**DONE**” icon to complete the producers e-signing ceremony and continue to the next available producer, if applicable.*

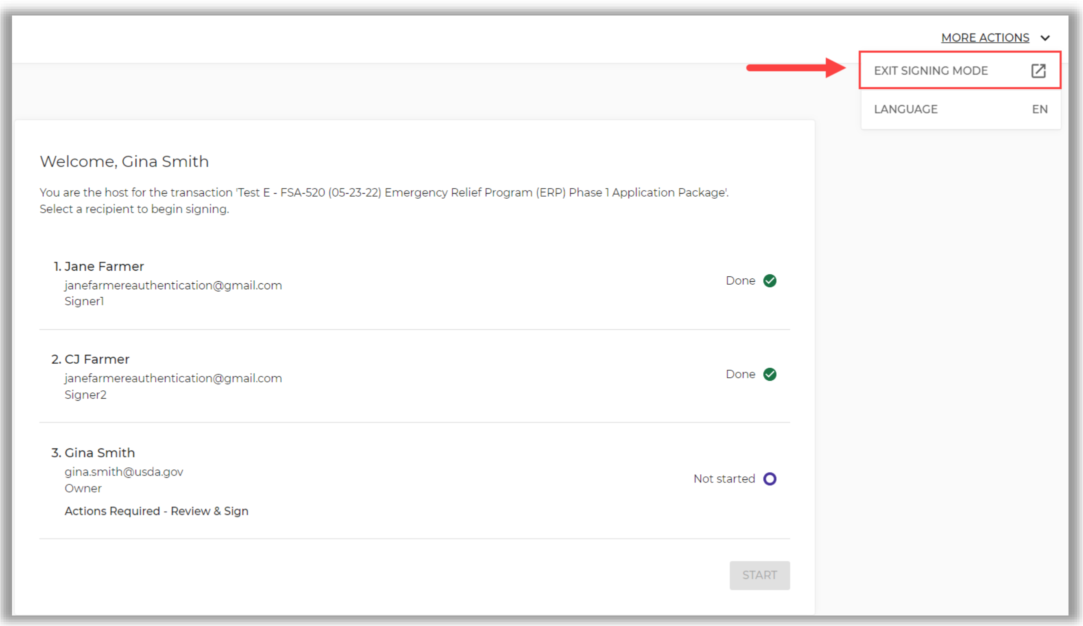
(see next page for continued instructions)

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.*



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.*

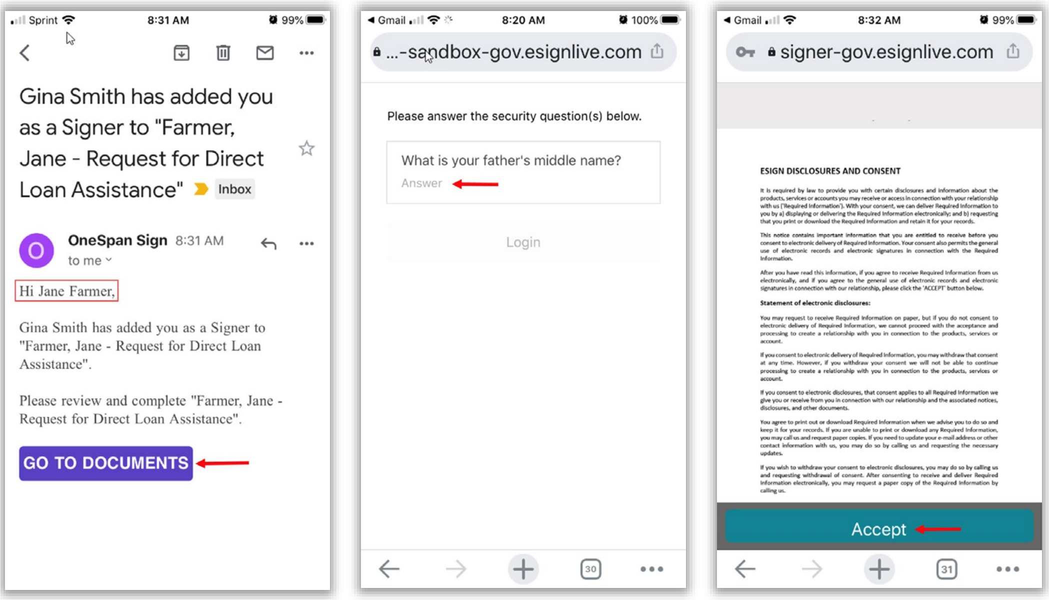


Complete! You have now finished the In-Person signing ceremony.

7.3 Mobile OneSpan Email Workflow

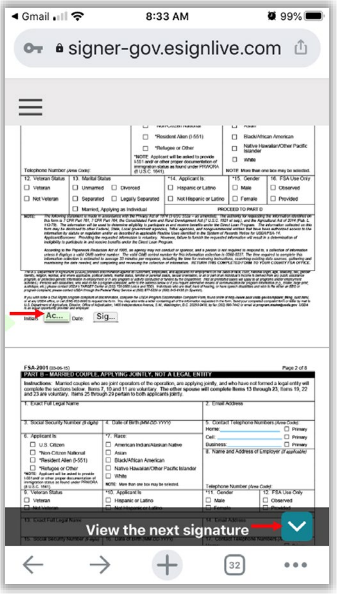
Producers with smartphones may find it convenient to digitally sign documents directly from their phone. To do this, they will receive an email via their mobile email inbox on their phone.

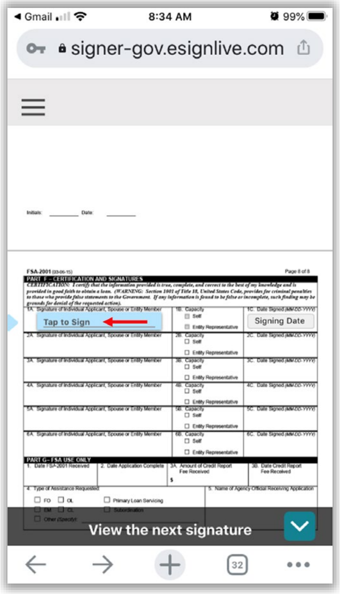
1. **Click** on **Go To Documents** to enter either a 6-digit code via text message or a Q&A will be required to access the document(s). Once the producer has completed their 2 Factor Authentication, the **Electronic Disclosures and Signatures Consent** form will display, and the producer must click **Accept** to continue.

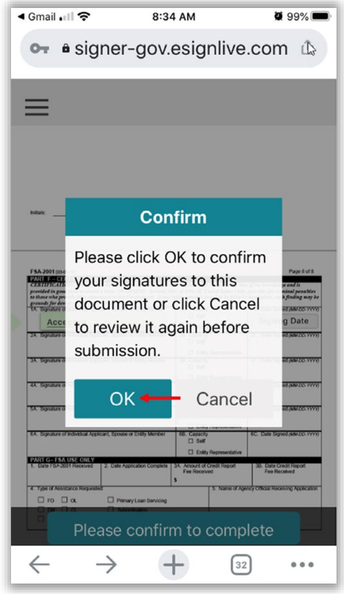


Note: It is not necessary for the producer to download the Box app if they are only using OneSpan to digitally sign.

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.



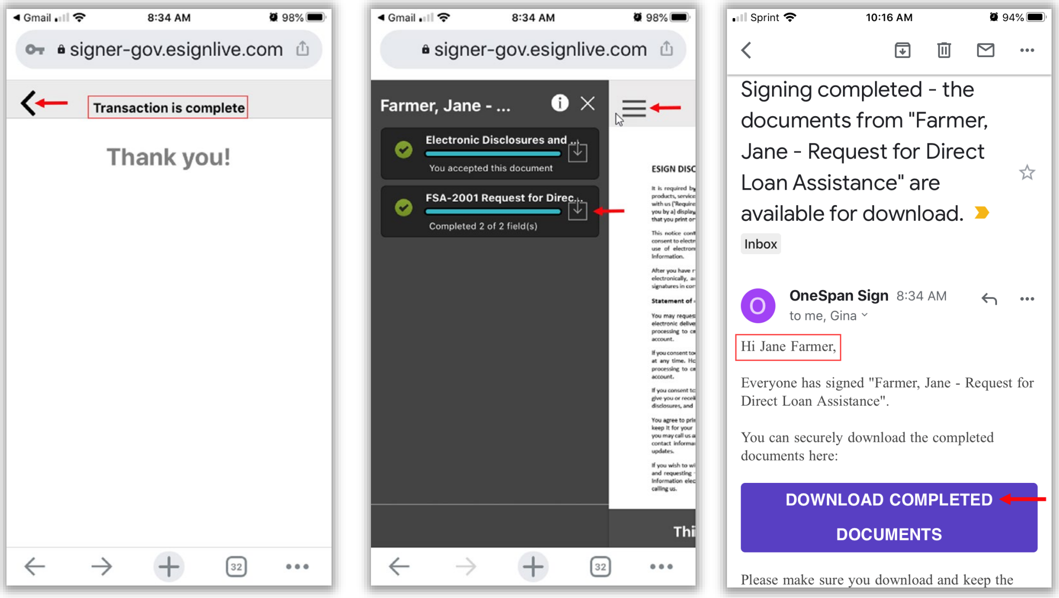




Important: Employees should use caution when adding Checkboxes or Radio Buttons. The producer must be aware to click on the appropriate one BEFORE signing and submitting. It is very difficult to see these options on a mobile device.

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)



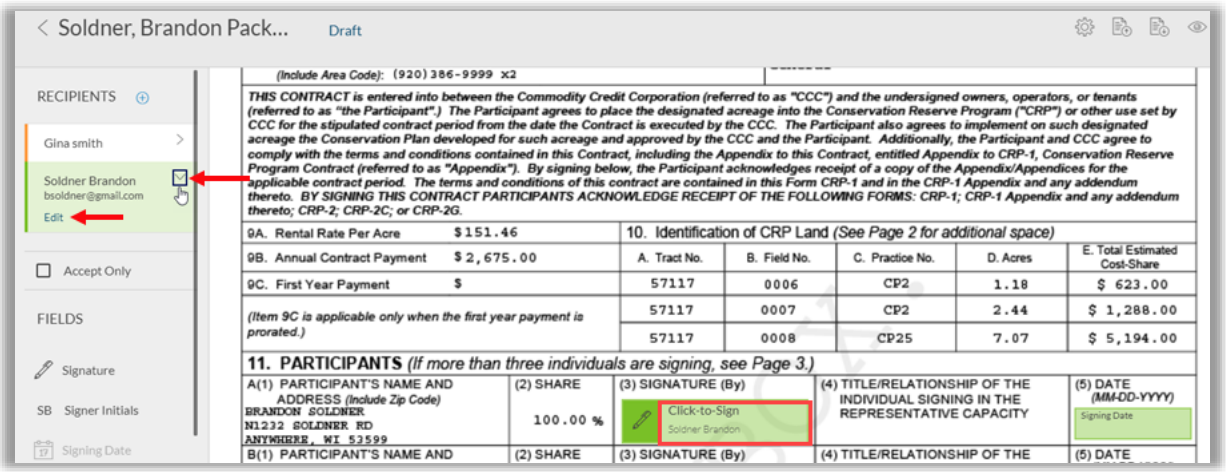
4. **Complete!** The producer has now signed and downloaded a document from a mobile device.

8. OneSpan – Edit New Package

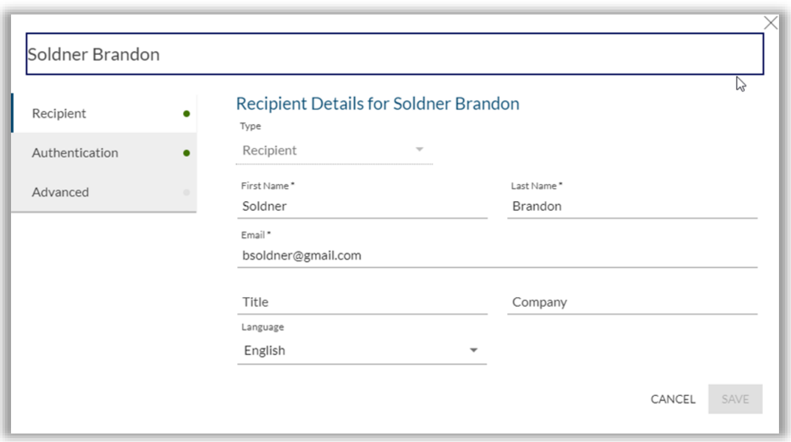
You may need to edit some of the detailed information for your recipient(s) or add an additional recipient(s) to a new package prior to sending for signature. In this example the first name and last name are reversed.

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**".



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.



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

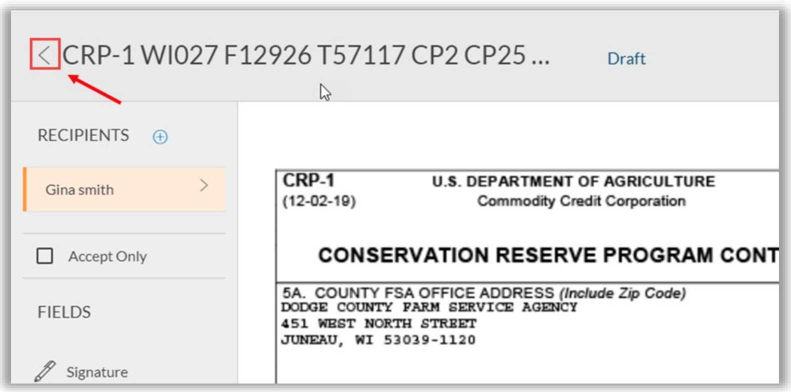
9. OneSpan – Edit Sent Package

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*.

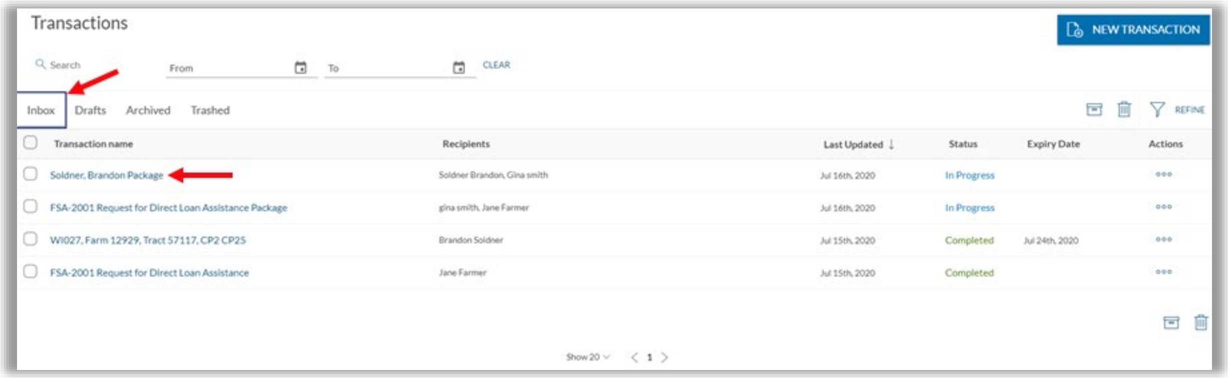
1. In Box, **Select** any document from a producer's folder and Click on the "**Send With OneSpan Sign FedRAMP**". The Draft Package will display. **Click** on the "**left arrow"** next to the title of the package.



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

(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.



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.

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.

(see next page for continued instructions)

6. **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.

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

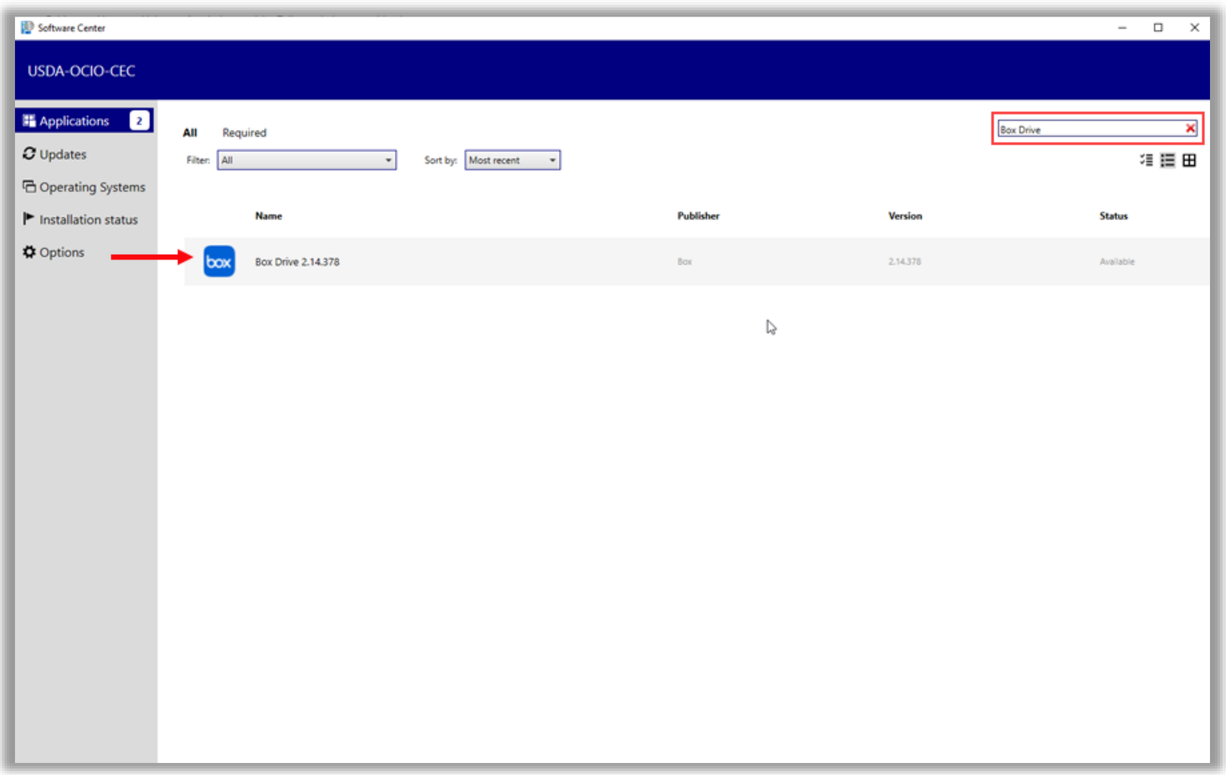
   e. You cannot add or remove a recipient (or recipients) from a document package if ANY recipient in that transaction has clicked to sign on ANY document in the document package

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

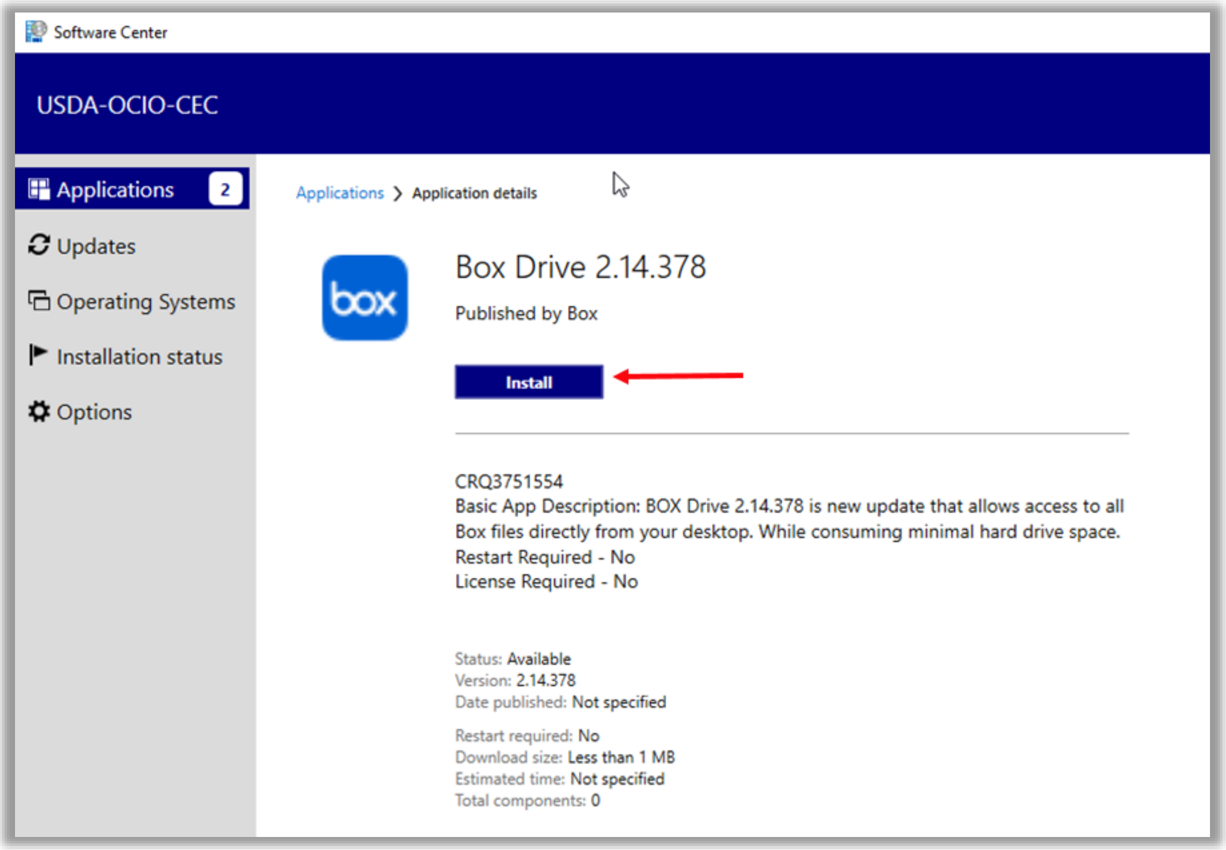
Access all your Box files directly from your desktop, without taking up much hard drive space. Box Drive is natively integrated into Mac Finder and Windows Explorer, making it easy to share and collaborate on files.

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.



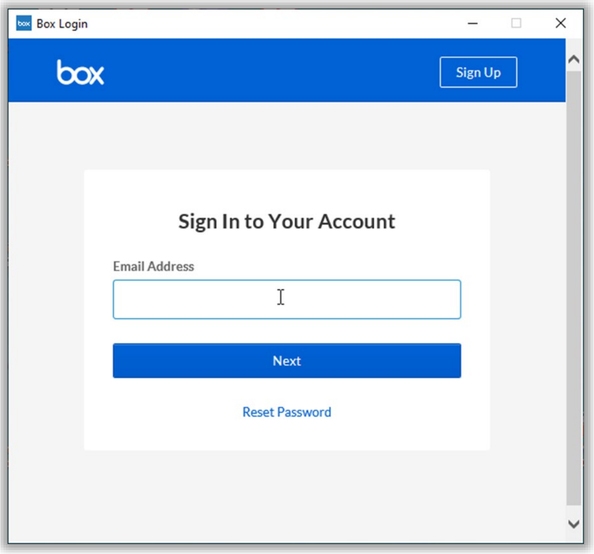
(see next page for continued instructions)

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.

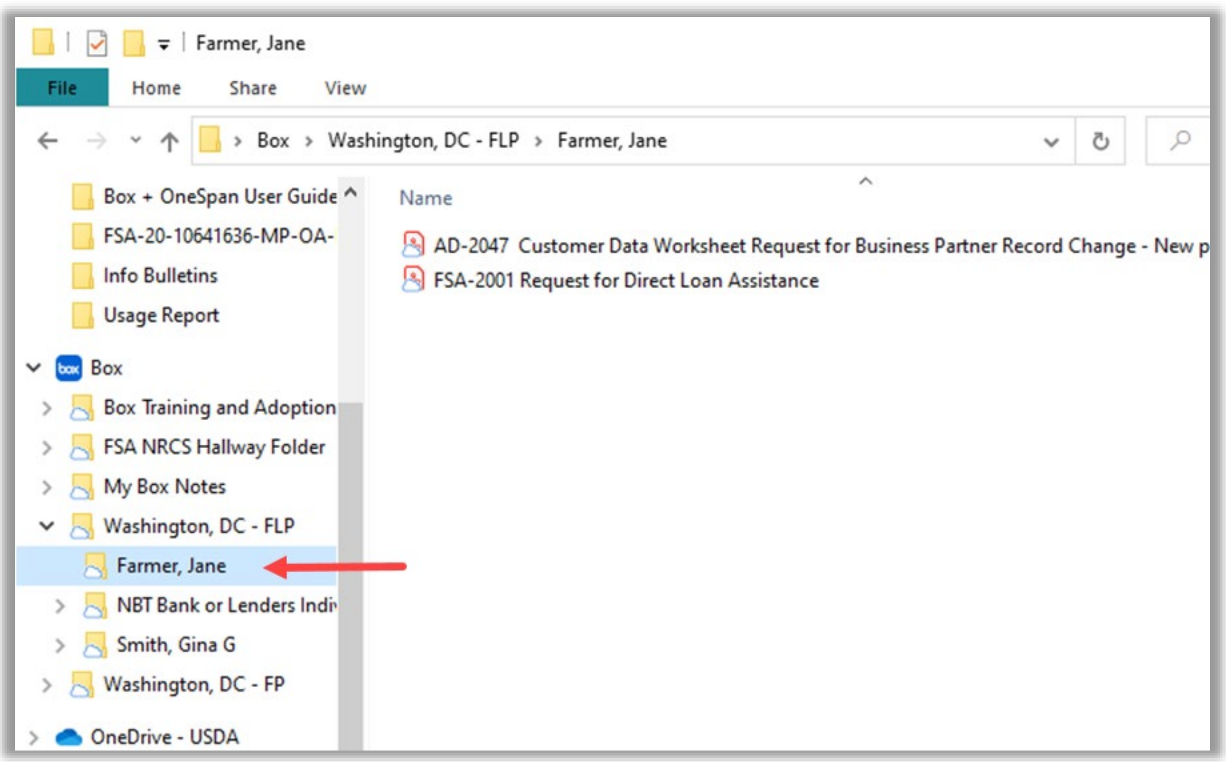


(see next page for continued instructions)

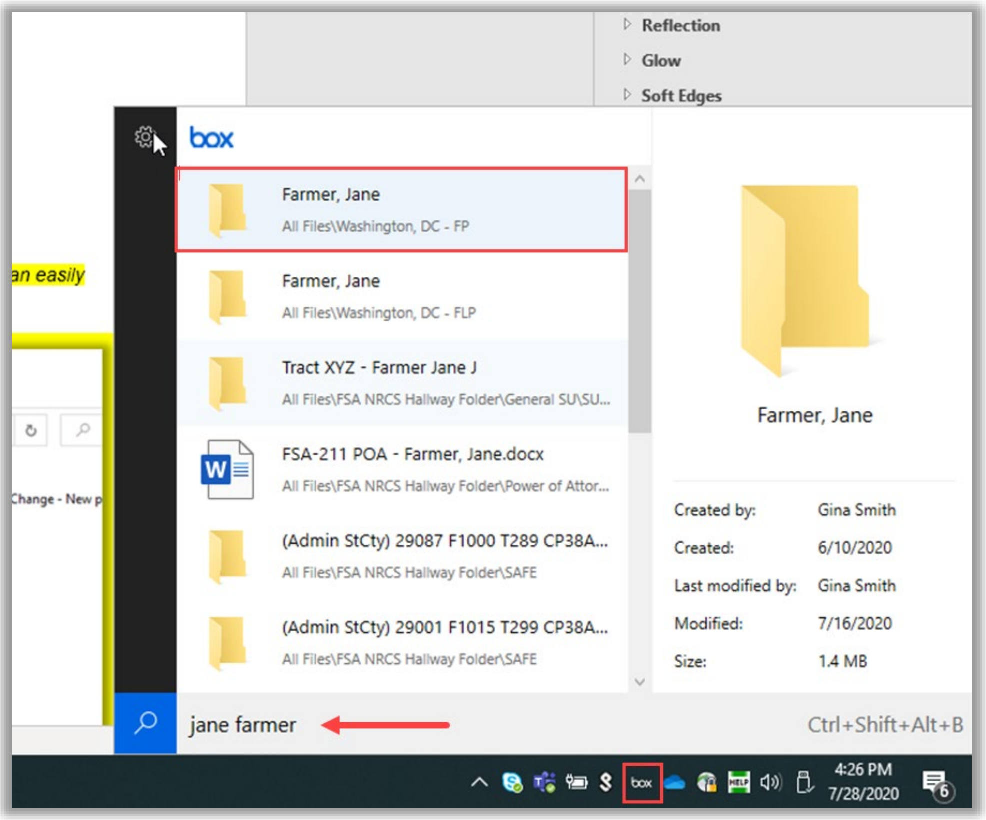
3. Once you have completed a "**Restart**", in the "**Search**" option at the bottom left corner of the screen, enter "**Box Drive**" and select the Box Drive App. You will be prompted to sign into your account. Make sure to use your government email address and then log in with PIV/CAC. You may take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



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.

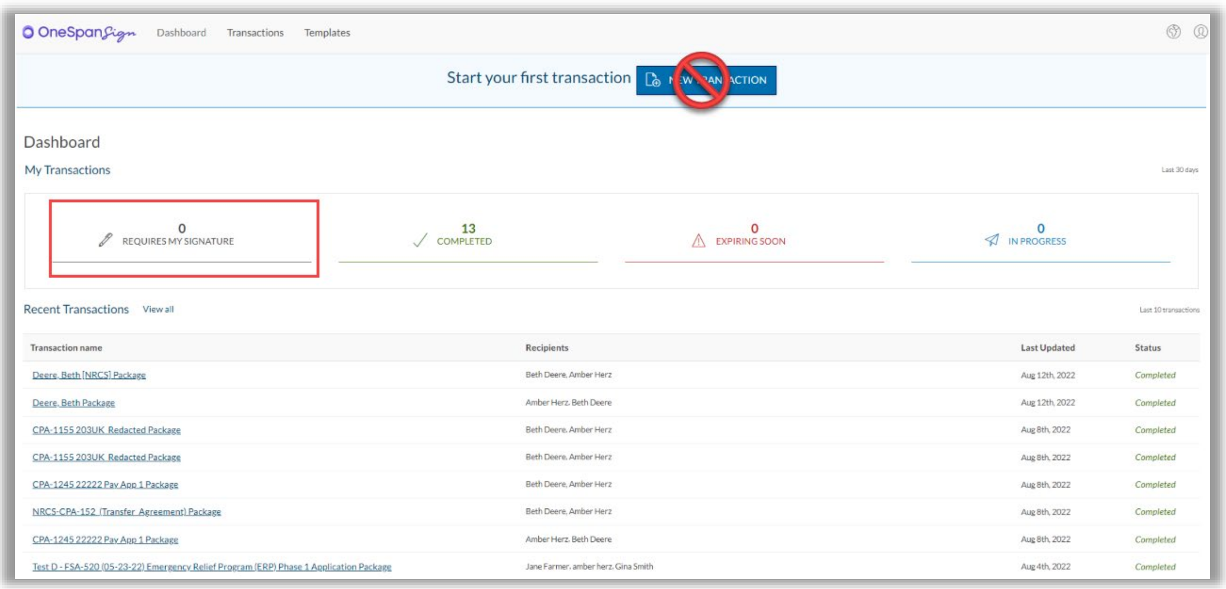
11. Approving Documents in OneSpan

*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 (**https://gov.esignlive.com/fpac**) 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.*



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*

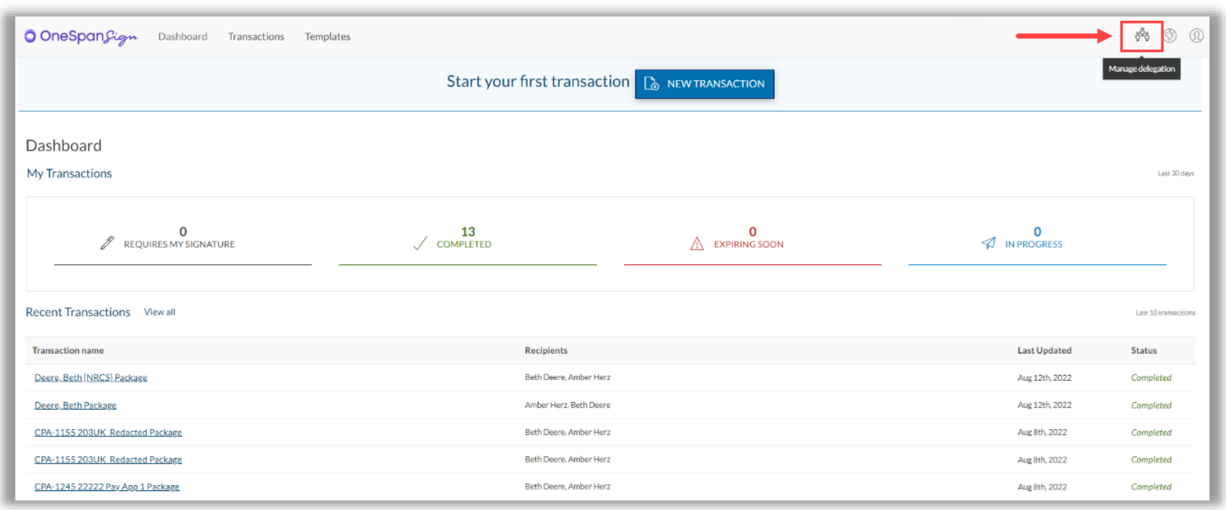
*The **Access Delegation** option enables a user to delegate access to their OneSpan Sign transactions to one or more other users on their account. Specifically, delegates can sign documents on behalf of the delegator, and they can access the delegator's inbox, drafts, layouts, and templates. All transactions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

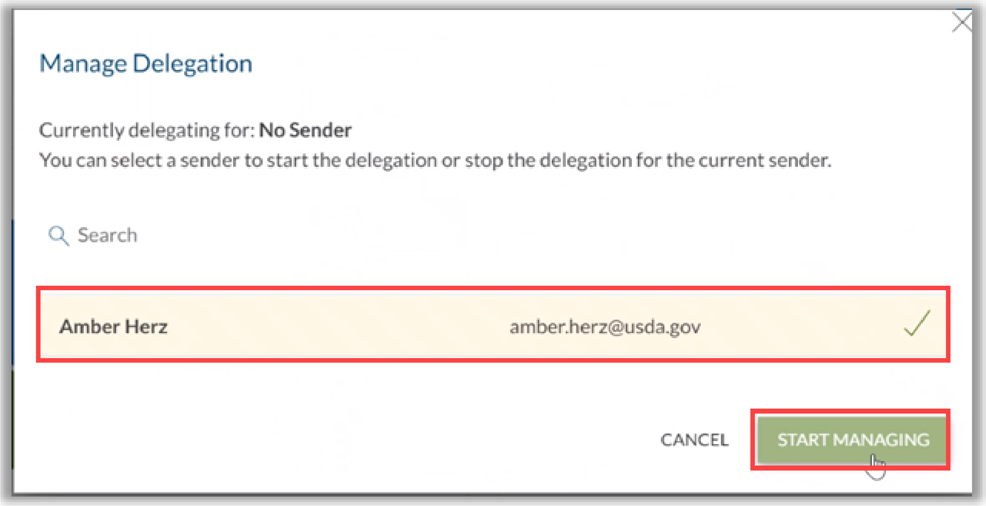
1. ***Click** the '**Manage delegation**' icon found at the top right-hand side.*



(see next page for continued instructions)

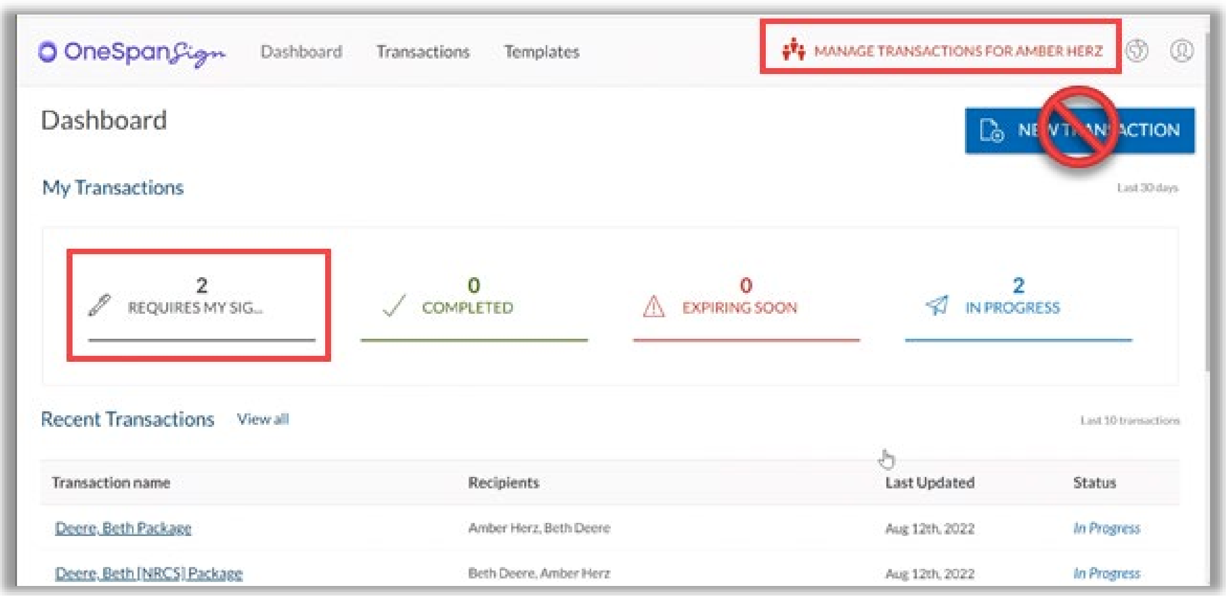
2. *In the '**Manage Delegation**' dialog box, select a delegate name and then click 'Start Managing'.*

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



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.

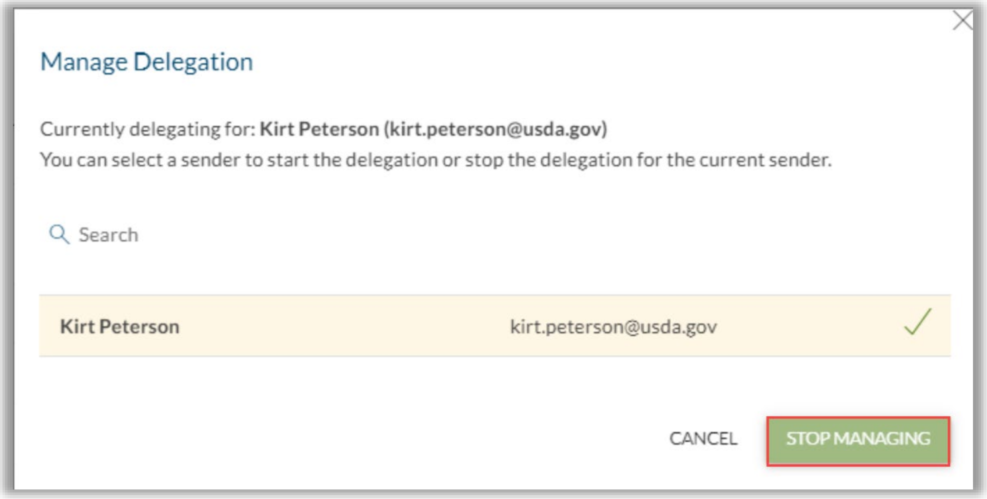


(see next page for continued instructions)

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.*



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 april.macdonald@usda.gov or dafoprmd@usda.gov and Gina Smith in OMS at gina.smith@usda.gov.

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 april.macdonald@usda.gov or dafoprmd@usda.gov and Gina Smith in OMS at gina.smith@usda.gov.

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 any sub-folders (e.g. other individual producer folders) underneath it. 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 https://gov.esignlive.com/fpac *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.