Detailed Instructions for Completing TSP Profile Parts 1 and 2

<u>Login to TechReg</u>:

1. Click "Login" on the TechReg home page.

2. On the USDA eAuthentication Login screen, enter your eAuthentication User ID and password and click "login."

3. An "Apply Online" page will be displayed. This page will display information from your USDA Service Center Information Management System (SCIMS) record. (SCIMS is a name and address database.) Please review your mailing address, email address, and telephone number for accuracy since this information becomes part of your profile and is used by both NRCS and conservation program participants trying to reach you. <u>To correct any errors, please contact your local USDA Service Center to make changes to your SCIMS record</u>.

4. Please enter your preferred contact method – "Email" or "Mail."

5. Check the "yes" block if you can speak Spanish.

6. Indicate if you are registering as "myself (an individual)" or as an "Individual with a Public Agency (An Employee of a Public Agency)."

7. Review the terms and conditions of the Certification Agreement. You must agree to the terms and conditions of the agreement in order to be certified. Click "agree" to move into Profile Part 1 of your Technical Service Provider profile. The date associated with this agreement is the computed date for certification expiration.

Complete Profile Part 1 (Background)

Please fill out all relevant sections of the profile in order to become a certified TSP. *Inadequate information will delay approval of your application to become a TSP.*

<u>If you have entered the system in order to create a business or public agency</u>, and do not plan to become a certified TSP yourself, then only fill out Section B, Associated Companies/Agencies. The rest of the profile is not necessary.

Use the "update…" and "add…" buttons to add records. Use the "edit" button to edit previously entered records.

Data displayed in Section A comes from SCIMS. This record was created when you received a Level 2 eAuthentication User ID. If any of the data in Section A is incorrect, please contact the

Service Center office that originally created your SCIMS record to have those corrections made. *If your email or address changes after certification, you must notify the local USDA Service Center to update this information. Failure to update this information may mean delays in recertification and/or being dropped from the eligible TSP listing.*

Steps to Complete Profile Part 1:

1. **Section A, Contact Information**, will be populated with your background information from the SCIMS database.

2. **Complete Section B, Associated Companies/Agencies**, only if the application for certification is for a business or public agency and only if you are the official representative of that business or public agency and have the authority to sign the Certification Agreement on behalf of that business or public agency. Official representatives are not required to be certified TSPs. Creation of a business or public agency will require that at least one individual associated with the business or public agency be certified as a TSP. To proceed:

    a. Click the "Business/Agency Profile" button to access a Business/Agency screen.

    b. Click the "Add Business/Agency" button to add a business or agency.

    c. Confirm that you are the official business/agency representative and have the authority to sign the certification agreement on behalf of the business or agency. NOTE: Once at least one certified individual is associated with the business, a certification agreement can be electronically signed by the official representative.

    d. Enter the Business name, exactly as entered in the SCIMS database, Business Type, Tax Identification Type, and Tax ID.

    e. Click on "update employees" to associate certified TSPs with the business or agency.

    f. Click "Sign Agreement" to electronically sign a certification agreement and complete the business or agency application for certification. NOTE: Do not sign the agreement at this time if you are also applying as an individual and will be the only "certified TSP" associated with the business. Wait until you have become certified as an individual and have updated the business's certified employees ("e" above) before signing.

    The remainder of the certification application pertains to certification of an individual.

3. **Complete Section C, Relevant Accreditations/Licenses,** to enter the licenses or certifications that are required to satisfy the criteria for certification in the categories of technical service you wish to provide. Include any state required licenses, license numbers, and expiration dates. This information is critical in order to remain on active status once certified. As information changes, you must return to this page to update your certification.

Add a Certification

a. Click on the “Add Certification/License” button.

b. Select a certifying organization.

c. Indicate the organization type by clicking on the appropriate button.

d. If it is a state certification or license, select the state from the dropdown list.

e. Enter the license number, if applicable.

f. Enter the license expiration date directly or use the popup calendar.

g. Click “Save.”

Edit or Delete a Certification

a. Click “Edit” in the row you wish to update.

b. Change the information as needed.

c. Click “Save” or “Delete.”

4. **Complete Section D, Education and Training**, by entering Bachelors or Graduate degrees, NRCS training, or other training required to satisfy the criteria for certification.

Add Education and Training

a. Click the “Add Education” button.

b. Enter the name of the institution.

c. Select the area of study.

d. Enter the completion date directly or use the popup calendar, if completed in 1978 or later.

e. Click “Save.”

Edit or Delete Education and Training

a. Click “Edit” in the row you wish to update.

b. Change the information as needed.

c. Click “Save,” “Delete,” or “Close.”

5. **Complete Section E, Relevant Work Experience**, by entering information regarding your work experience as it relates to providing technical services.

Add Relevant Work Experience

a. Click the "Add Work Experience" button.

b. Enter the completion date directly or use the popup calendar, if completed in 1978 or later.

c. Enter the description and location of the work performed in the comments box.

d. Enter start and end dates if applicable.

e. Click "Save."

Edit or Delete Relevant Work Experience

a. Click "Edit" in the row you wish to update.

b. Change the information as needed.

c. Click "Save," "Delete," or "Close."

6. **Complete Section E1, Professional References**, by providing at least two non-USDA references that can verify your experience and qualifications (this is not a recommendation for certification). *The purpose of this section is to provide references who can verify your work*. Always fill this section out.

   Your references should include at least one professional who can verify your experience and proficiency for conservation planning and/or design, layout, installation, and checkout of the conservation practices for the categories of technical service you wish to provide. Your second reference should be a customer to whom technical service has been provided. USDA staff cannot be used as references for this purpose. Please provide the names of the references, addresses, phone numbers, and email addresses as available. The references will only be used by USDA personnel and will not be published in the résumé available from the TSP Locator in TechReg.

   Certification criteria for some categories require references specific to the category or practice you want certification in (indicated by a checked box in Section G). In such cases your application will not be processed if Section E1 is not completed. Additionally, NRCS staff will be looking at this section carefully for all categories.

7. **Complete Section F, Familiarity with NRCS Guidelines, Criteria, Standards, and Specifications,** by entering a brief description of your familiarity with these items. If any of this information changes, you can return to this page to update your certification.

   Add Familiarity with NRCS Guidelines, Criteria, Standards, and Specifications

   a. Click the "Add NRCS Familiarity" button.

   b. Enter the completion date directly or utilize the popup calendar, if completed in 1978 or later.

c. Describe your familiarity with NRCS guidelines, criteria, standards, and specifications and click "Save."

8. **Complete Section F1, NRCS Conservation Planning Training Requirement**.

   a. Click on the Add NRCS Training.

   b. If you have had the Conservation Planning modules or equivalent, click the box in front of "I have received NRCS Training Modules or equivalent" and "Save." If you have not had the training, register for the course through the AgLearn link provided.

9. **Complete Section F2, NRCS TSP Orientation**.

   a. Click on the Add NRCS Orientation.

   b. If you have taken the Orientation course, click the box in front of "I have received NRCS Training Modules or equivalent" and "Save." If you have not had the training, register for the course through the AgLearn link provided.

10. Click "Continue to Profile Part 2."

Complete Profile Part 2 (Technical Services)

Please fill out all relevant sections of the profile in order to become a certified TSP. *Inadequate information will delay approval of your application to become a TSP.*

Steps to complete Profile Part 2:

1. **Complete Section G, Certification Categories,** by selecting a state/category (or categories) combination and then click the "Confirm Qualifications" button to complete the certification criteria portion. The Update Criteria table must be filled out in this section before you can submit the application for review and certification.

   After signing the agreement in Section J, Section G should show a "submitted" status (as in submitted for review). If you miss something your application will show "incomplete" and you won't be allowed to sign your certification agreement. The only status you ultimately want to see is "submitted." This indicates your application has been submitted for review.

   Many mistakes are made in this section. Some candidates fail to select or toggle an "option." Others fail to check one or more "how criteria were met" boxes making the application "incomplete." Others fail to provide references when references are mandatory.

   To select a state and categories

   a. Click "Add Category" to select a state and the technical service categories you desire to provide.

   b. Select a state from the drop-down box.

c. The Category Available section will be populated with the choices available for the selected state.

d. Click the "Click to go to Category Detail Page" to open another page with a comprehensive report of the categories and associated technical services. Close this page to return to the Add Category page.

e. Click a category for which you desire certification and then click the >>> box to move the category to the Category Selected list. (You can select more than one category at a time by holding down the control key on your keyboard and clicking on each category that you desire to move to the Category Selected list. Then click >>> to move all of the items at once.)

f. To remove items from the Category Selected list, click the items in the Category Selected box, then click the <<< box.

g. Save your selection.

h. Since the certification process is specific to individual states, you must repeat this process for each state in which you desire to provide technical services.

NOTE: After selecting the categories, you must match your qualifications entered in Profile Part 1 to the categories selected.

<u>To enter qualifications for categories</u>

a. Click the “Confirm Qualifications” button in the category row for which you need to enter qualifications.

b. Select **ONE** certification option from the certification option or options listed. You must meet **ALL** of the certification criteria in the selected certification option. Selecting the wrong option will cause your application to be deferred and you will need to correct deficiencies before approval.

c. If the selected certification option requires a license or certification, select a license or certification from the drop-down choice list.

d. For each criteria item within your selected certification option, place a check mark in each box, Education, Work Experience, or NRCS familiarity that satisfies the criteria. For example, if the criteria require a degree in a particular field, and you listed your degree under Profile Part 1, Section D, Education and Training, you should check the box for that row under Education. Failure to check appropriate boxes based on experience and training will delay approval of your application to become a TSP.

e. When you have confirmed your qualifications, click “Save.” After saving, you will be returned to the Profile Part 2 screen.

f. Once all the criteria for certification have been met, the status of the category will be set to “Ready to Sign.” (<u>“Ready to Sign” means ready to be submitted for review once you have signed your certification agreement at the end of</u>

Profile Part 2.) Incomplete items will not be submitted for review.

g. Complete certification qualifications for all the services you have selected before you electronically sign the certification agreement by clicking "sign Agreement" at the bottom of page two of your TSP profile.

2. **Complete Section H, Services to be Provided.** Each category entered in Section G defaults to All Services (all technical services) within the category in Section H. You may not wish to provide all of the technical services in the category or may not be able to because of State requirements or need for a specific license. If that is the case, you can limit the list of services by using the "edit" button to select only those services you wish to provide.

   To select services for a category

   a. Click "Edit" on the row in Section H, Services to be Provided.

   b. Click selections in the Service Available list, then click the >>> box to move items to Services Selected list.

   c. To remove items from the Services Selected list, click the selections in the Services Selected box, then click the <<< box.

   d. Save your selection.

3. **Complete Section I, Servicing Areas.** The states listed are those you entered in Section G. You may not wish to provide technical services in all of the counties in the state. If that is the case, you can limit the list of counties by using the edit button and then selecting only those counties in which you desire to provide technical services.

   Click the "Edit" button to display a data entry form for completing information about the Servicing Area for which you wish to be certified. By default, you are requesting certification for every county within a state. If you wish to serve only selected counties, you must specify those counties. If any information changes, you can return to this page to update your certification.

   To select servicing counties, if other than the entire state

   a. Click the "Edit" button for a particular state.

   b. Click the appropriate counties in the Counties Available list, then click the >>> box to move the counties to the Counties Selected list.

   c. To remove counties from the Counties Selected list, click the selections in the Services Selected box, then click the <<< box.

   d. Save your selection.

4. **Review Section J, Certification Agreement History.**

   You may review the Certification Agreement containing the terms and conditions of your

certification. When you click “Sign Agreement” you are signing the agreement electronically.

NRCS will then review your application for certification. If you are qualified to provide the service you selected, you will be certified as a TSP in those services.

The business certification agreement will contain the name of the individual(s) certified, the date certified, and the categories and states where the individuals are certified. After certification, the individual TSP will appear on the approved list of Technical Service Providers accessible through the TSP Locator on the TechReg home page. If you have applied for a business TSP certification and you have indicated in your business profile that you want your employees listed on the TSP registry, individual TSPs associated with your certified business will be listed on the registry. If you indicate on the business profile that you do not want the business certified TSP employees listed, only the business will be listed on the TSP business registry.

Each time you change your certification categories, and confirm your qualifications to provide TSP services, you will be asked to submit another application for certification by clicking the Sign Agreement button. Each certification agreement is saved and can be displayed by using the view button.

The Certification Agreement History tracks your original certification and all updates to your Technical Service Provider Certification.