

For: State and County Offices

NRCS Access to MIDAS CRM

Approved by: Acting Deputy Administrator, Farm Programs



1 Overview

A Background

NRCS partners with FSA to help better serve our producers. This partnership continues to provide our agencies the opportunity to better serve our producers and further enhance the services we are able to provide.

Prior to MIDAS Release 2 in December 2014, authorized NRCS employees had create and edit capabilities in SCIMS. When MIDAS CRM/Business Partner became the System of Record/System of Entry with MIDAS Release 2, SCIMS became view-only for all FSA and NRCS users. At this time, NRCS had not yet procured the required software licenses necessary to access CRM. Since December 2014, NRCS employees have relied on FSA employees to create and update customer records on their behalf in CRM/Business Partner.

In early 2016, NRCS management analyzed the number of licenses they would require, and purchased 1000 software licenses for CRM access.

Following the license purchase, FSA and NRCS began collaborating on:

- access (view/create/modify/delete) to CRM Business Partner and Farm Records
- creation of unique CRM security roles for NRCS
- training strategy
- training material development.

DAFP/PECD staff developed training materials specifically for NRCS users, and trained approximately 50 NRCS State Office employees in late October 2016.

Disposal Date	Distribution
November 1, 2017	State Offices; State Offices relay to County Offices

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1 Overview (Continued)

B Purpose

This notice informs National, State and County Offices:

- of the CRM functions and authorizations of the new CRM security roles “NRCS User” and “NRCS Viewer”
- of training completion for NRCS state trainers (aka “NRCS Super Users”)
- of ongoing training for limited number of NRCS end users
- that no NRCS training is necessary by FSA state trainers or FSA MIDAS Super Users
- of continued collaboration between FSA and NRCS in the County and State offices.

2 MIDAS CRM Security Roles for NRCS Employees

A Overview

Two unique CRM Security Roles were developed for NRCS employees:

- NRCS Viewer
- NRCS User.

The NRCS Viewer role authorizes employees to view limited Business Partner and Farm Records data. All data in CRM is view-only, no edits are permitted.

The NRCS User role authorizes employees to create and modify limited Business Partner data and view Farm Records data. Refer to subparagraph E for the NRCS User CRM security role permissions.

B Licensing for CRM Access

Like most commercial-off-the-shelf (COTS) software, a license is required for each user to access the software. SAP, the company that developed CRM software, requires a purchased license for each person that intends to access CRM.

At the time of MIDAS Release 2, NRCS had not yet purchased CRM licenses from SAP; therefore, NRCS employees did not have access to MIDAS CRM immediately after the release.

In early 2016, NRCS purchased:

- 1000 licenses for read/write access to CRM
- 0 licenses for view-only access to CRM.

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2 MIDAS CRM Security Roles for NRCS Employees (Continued)

B Licensing for CRM Access (Continued)

Although NRCS did not purchase licenses for view-only access, FSA developed the CRM security role as a “placeholder” in preparation for any view-only licenses that may be purchased in the future.

C Licenses and NRCS CRM Users per State

The number of NRCS Users per State varies. Prior to purchasing the licenses, NRCS management considered:

- how many NRCS employees had actively created or edited records in SCIMS in prior years
- how many CRM users each NRCS State Office requested.

In some States, NRCS opted to purchase licenses only for State Office personnel, while in other states, NRCS opted to purchase licenses for County Office users. The purchase of, and assignment of, licenses to NRCS end users was strictly an NRCS decision. FSA did not provide input as to who should or should not have access.

D Training in Progress

Following NRCS’s decision to utilize a train-the-trainer approach, DAFP/PECD staff developed training materials specifically for the new NRCS User CRM security role. In late October 2016, DAFP/PECD staff delivered this training in-person to approximately 50 NRCS State Office employees, who will:

- be referred to as “NRCS Super Users”
- become trainers for their agency.

The NRCS Super Users will deliver the training courses to approximately 950 NRCS end users and are targeting completion by January 2017.

FSA will **not** be directly involved with training the NRCS end users.

E NRCS User CRM Security Role Permissions

The view/add/modify/delete permissions for employees with the NRCS User CRM security role are defined in Exhibit 1.

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3 NRCS and FSA Continued Collaboration

A NRCS Action

NRCS Users will need to contact an FSA employee for assistance when encountering an issue in CRM that requires remediation and the NRCS user does not have security permissions to complete the update. This is consistent with how similar issues were handled in SCIMS and Web Farm Records. Examples include:

- initiating the merge process for duplicate records
- deletion or correction of a TIN, TIN Type or DPE
- prior year role edits
- deletion of an FSA or FLP Program Participation
- deletion of an Associated County (Legacy Link)
- record inactivation
- updates to Farm Records.

NRCS Users have been instructed to reach out to any of the following for assistance, in the order that they are listed:

1. FSA County Office CRM user
2. Applicable NRCS SCIMS/Business Partner State Security Officer (NRCS BP SSO)/NRCS Super User
3. Applicable FSA SCIMS/Business Partner State Security Officer (FSA BP SSO).

The list of FSA and NRCS SSO's are available at

<https://sharepoint.apps.fsa.usda.net/iso/public/Lists/State%20SCIMS%20Security%20Officers%20%20FSA%20Backups/AllItems.aspx>.

All actions are compliant with policy issued in 1-CM (Rev. 3), Section 5.5, FSA Responsibilities Regarding NRCS Customers.

B FSA County Office Action

FSA County Offices must assist NRCS users with customer and farm records data management, when requested. This includes:

- assistance with updates or questions pertaining to customer data
- creation of cleansing cases for merging duplicate records
- creation of Key Field Change requests for modification of key fields
- updates to Farm Records
- general support as necessary.

This agency collaboration is compliant with policy issued in 1-CM (Rev. 3), Section 5.5, FSA Responsibilities Regarding NRCS Customers.

FSA County Offices should contact their own FSA SSO if necessary for assistance. Refer to the link in subparagraph A.

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3 NRCS and FSA Continued Collaboration (Continued)

C FSA State Office Action

FSA State Offices shall refer all SCIMS and Business Partner issues and questions from “NRCS Users” to the appropriate FSA BP SSO. Refer to the link in subparagraph A.

Note: Only SSO’s are permitted to perform advanced edits on Business Partner records. State Office employees that are not approved SSOs are forbidden from performing these functions.

D FSA BP SSO Action

FSA BP SSO’s must assist FSA and NRCS users with customer data management, when requested. This includes:

- assistance with updates or questions pertaining to customer data
- completion of cleansing cases for merging duplicate records
- completion of Key Field Change requests for modification of key fields
- general support as necessary.

This agency collaboration is compliant with policy issued in 1-CM (Rev. 3), Section 5.5, FSA Responsibilities Regarding NRCS Customers.

NRCS User CRM Security Role Permissions

Customer BP Records	View	Add/Create	Modify	Delete
Names	Yes	Yes	Yes	Yes
Addresses	Yes	Yes	Yes	Yes
Phone Numbers	Yes	Yes	Yes	Yes
Email Addresses	Yes	Yes	Yes	Yes
Current Year Role	Yes	Yes	Yes	No
Prior Year Roles	Yes	No	No	No
TIN & TIN Type	Yes	Yes	No*	No*
Profile (Demographic Info)	Yes	Yes	Some	Some
Mail Indicator Flags	Yes	Yes	Yes	Yes
Inactive Flag	Yes	No	No	Yes [±]
Representative Capacity	Yes	No	No	No
Relationships	Yes	Yes	Yes	Yes
Designated Paying Entity (DPE flag) in SSN Family	Yes	No	No	No
FSA or FLP Program Participation	Yes	Yes	No	No
Program Participation (all others)	Yes	Yes	Yes	Yes
Associated County (Legacy Link)	Yes	Yes	No	No
Attachments	Yes	Yes	No	No
Financial Services Data	No	No	No	No
Common Eligibility Data	Yes	No	No	No
Member Hierarchy	Yes	No	No	No
Fact Sheet	Yes	No	No	No
Initiate Cleansing Case (process to Merge Customer records)	No	No	No	No
Initiate Key Field Change Request	No	No	No	No
* Reduced permission from SCIMS, at the agreement of FSA and NRCS Management.				
± Similar to FSA Users, NRCS Users can delete the Inactive Flag in order to reactivate a customer record. County Office users from both agencies are prohibited from Inactivating a customer record (it requires State Office action).				
Employee BP Records	View	Add/Create	Modify	Delete
Name	Yes	No	No	No
Email Address	Yes	No	No	No
Relationships	Yes	No	No	No
Office OIP, Description and Address	Yes	No	No	No

NRCS User CRM Security Role Permissions (Continued)

Contact BP Records	View	Add/Create	Modify	Delete
Name	Yes	Yes	Yes	Yes
Addresses	Yes	Yes	Yes	Yes
Phone Numbers	Yes	Yes	Yes	Yes
Email Address	Yes	Yes	Yes	Yes
Relationships	Yes	No	No	No
Farm Records				
Farm Records	View	Add/Create	Modify	Delete
GIS Info	Yes	No	No	No
General Data	Yes	No	No	No
Land Data	Yes	No	No	No
Crop Election Data	Yes	No	No	No
Crop Data	Yes	No	No	No
Parties Involved (Business Partners)	Yes	No	No	No
FPMS Status	Yes	No	No	No
Installed Base Hierarchy	Yes	No	No	No
FSA-156EZ	Yes	No	No	No
Fact Sheet	Yes	No	No	No
MIDAS Portal				
MIDAS Portal	Yes	n/a	n/a	n/a
CRM Workflows				
CRM Workflows	No	n/a	n/a	n/a
CRM Alerts				
CRM Alerts	No	n/a	n/a	n/a