

Establishing a Customer Record and Farm Record



Step 1 - Pre-Appointment Information

Establishing a Customer Record and Farm Record with the Farm Service Agency (FSA) is one of the first steps to participation. In preparation of working with FSA to establish these records, you will need to provide:

- Proof of ownership (deed, etc.) that includes a complete Property Description.
- Leases or verification of interest in the land (for land that is not owned by you), as applicable.
- FSA forms:
 - The AD-2047, Customer Data Worksheet is required for all individuals and entities. The form gathers contact information, operating status, demographic information, agency interest, and more.
 - Forms can be located at: farmers.gov/working-with-us/common-forms.
- If you are operating as an entity, you may consider locating:
 - The SS-4 form from the IRS can be a great reference tool. The SS-4 form will include important information such as the Employer Identification Number (EIN).
 - Documentation relating to your Entity Identification Status (Articles of Incorporation, etc.).



Step 2 - Schedule an Appointment

Once you have located your applicable pre-appointment information, you are ready to schedule your first FSA appointment.

Visit: farmers.gov/working-with-us/service-center-locator to locate your nearest Service Center.

Appointments can be scheduled and conducted electronically via e-mail or fax, or in person at your local FSA office.

Appointments offer an opportunity for new participants to review their documentation and farming goals with trained FSA staff.

Farming goals can vary from participant to participant. Potential farming goals can involve financing, networking, conservation, extending growing seasons via high tunnels and much more. Communicating your goals allows for FSA to recommend the right programs for you.

Step 3 - Appointment

During your appointment, FSA staff will review your documentation. If further information is required, the staff will request it at this time.

Feel free to ask questions, and share your farming goals, so the staff can refer you to the applicable agency. For instance, those looking for additional funding could be referred to a USDA farm loan office, or those interested in high tunnels could be referred to the Natural Resources Conservation Service (NRCS).

Step 4 - Post-Appointment

FSA staff will process all of the data submitted during your appointment. This includes establishing your customer record, identifying the land associated with your farm and establishing your farm record. During the process of establishing your farm record, your land will be assigned a unique farm and tract number.

FSA staff will send you a packet of information to inform you that your customer and farm record has been completed.



This packet of information could include:

- Notification of your official farm and tract number.
- An FSA-156EZ form. The form will provide information relating to your acreage, ownership of the land, and more.
- An official map containing your parcel of land.
- If you have any questions or concerns relating to your packet of information, please contact the office in which the records were established.

Inform your local office of any changes to your business, or if you experience a disaster to your farming operation. Continue to stay involved with FSA by voting or running for a position for the County Committee.

Further information pertaining to County Committees can be found at: fsa.usda.gov/news-room/county-committee-elections/index.

Once FSA has established your farm record and you have obtained a farm and tract number, you may wish to work with NRCS to gain potential conservation assistance, engineering assistance, and/or technical assistance for your land. Learn more about NRCS at: nrcs.usda.gov.

Additionally, you may wish to participate with FSA for farm loan assistance. Farm loans are not grants and not all service center locations will have a farm loan presence. Learn more about locations by visiting: farmers.gov/working-with-us/service-center-locator.

To certify that you receive the most up-to-date information, you can inquire about signing up for e-mail or text updates. This can be performed at the time of your appointment or by visiting: public.govdelivery.com/accounts/USDAFARMERS/subscriber/new/.

Find your Local Office

To find your local office, go to:
farmers.gov/service-locator

Appendix 5: Worksheet to Prepare for Your First Visit with USDA

This worksheet is provided as a tool to help you reflect on and clarify the needs of your operation. If you choose to fill it out, be sure to bring it along with you for your first visit to a USDA service center to help facilitate the discussion and get the help you need. Please select as many of the options below as apply to you and your operation.

I meet the USDA definition of a (select all that apply, see Are You a Historically Underserved Farmer or Rancher? on page 4):

- Beginning Farmer or Rancher
- Limited Resource Farmer or Rancher
- Socially Disadvantaged Farmer or Rancher
- Veteran Farmer or Rancher

I am interested in:

- Farm Number to enable me to participate in USDA financial assistance programs
- Loan
- Insurance
- Disaster Assistance
- Market Risk and Facilitation
- Conservation Plan
- Person to recommend resources in my area to help me gain experience or learn more about farming before I start

My current operation is:

- Conventional
- Certified Organic
- Transitioning to Organic
- Exempt from Organic Certification (sales below \$5,000/year)
- Mixture of Organic and Conventional
- Heirs' Property (see Navigating Complex Land Ownership on page 30)

I operate:

total acres including these land use types: rangeland pastureland forestland cropland

(If applicable) I currently produce: _____

I am considering producing the following agricultural products: _____

My conservation goals include:

- Soil** - reducing or preventing soil erosion; improving soil health and quality.
- Water** - irrigation and drainage water management; reducing flood damage; improving water quality on and off my farm.
- Air** - minimizing emissions and drift of particulate matter, pesticides, odors, and greenhouse gases.
- Plants** - improving plant productivity and health, increasing biodiversity, minimizing pests, and reducing wildfire threat.
- Animals** - providing feed, forage, water, and shelter for livestock; enhancing wildlife habitat or biodiversity.
- Humans** - economic and social considerations.
- Energy** - improving energy efficiency of equipment, facilities, practices, and field operations; reduction of emissions from nutrients and animal waste.
- Meeting National Organic Program (NOP) regulations.
- Extending the growing season and improving plant health with a high tunnel system.
- Other: _____

I want to:

- learn about serving on my local county committee.
- sign up for USDA email updates and/or learn how to get a farmers.gov profile.

For those agricultural producers that perhaps have not worked with the USDA FSA office before, consider making an appointment as the initial meeting with FSA and understand that this will take longer than a typical appointment with FSA. That's because FSA will need to establish a customer record and a farm record. FSA must also determine program eligibility.

1. Before Your Visit:

Make an appointment by calling FSA and check on their schedule. An appointment will help to ensure prompt service as FSA offices can get busy, especially at times around program sign-up and reporting deadlines. Tell us about your operation and if you are experiencing a loss due to the drought. If you are interested in specific programs, let FSA know so they can have the correct staff member assist you. Contact information for each Ohio County FSA office can be found at:

<https://offices.sc.egov.usda.gov/locator/app?state=oh&agency=fsa>.

2. Prepare:

Ask FSA staff what information you should bring to help make the most of your appointment. Examples could include lease agreements or property deeds, an official tax ID (such as social security number or employer ID), or legal entity paperwork, livestock inventory records.

3. Keep in touch with your local FSA office.

Let FSA know if your business changes, if you experience additional disaster or hardships, or if you have any questions about USDA programs and services. Ask FSA to sign you up to receive free electronic newsletter updates from the service center and the Ohio FSA state office. This provides you with information if new program signups are created by Congress and helps to provide producers with information regarding FSA services, loans, and programs sign-ups and deadline announcements.

Additionally, we wanted to share with the organizations FSA's online tools that producers can use to help them identify what FSA programs they may be eligible for.

Disaster Assistance Discovery Tool

Learn about USDA disaster assistance programs that might be right for you by completing five simple steps. Visit <https://www.farmers.gov/protection-recovery/disaster-tool>

FSA Livestock Forage Disaster (LFP) Program Eligibility Tool

· If you grow forage for livestock and have recently gone through drought, this website <https://droughtmonitor.unl.edu/FSA/Home.aspx> can help you find out whether you qualify for assistance. Qualifying for assistance is based on the U.S. Drought Monitor and on your county's designated grazing periods. To use this tool, you will need to know your county's grazing period and for Ohio the 2024 LFP Grazing period ends October 31, 2024. If you are not sure what it is, please consult your FSA County Office at:

<https://offices.sc.egov.usda.gov/locator/app?state=oh&agency=fsa>.