

For: State and County Offices

Fiduciary Record and Business Partner Cleanup

Approved by: Deputy Administrator, Farm Programs



1 Overview

A Background

The Fiduciary software was taken offline/retired in 2013 with MIDAS Release 1. Notices MIDAS-9 and CM-721 notified Field Offices that Fiduciary records would be managed in Business Partner after MIDAS Release 1.

At this time, it was determined that some producers had duplicate or incomplete records in the Fiduciary software, and the records could not be automatically loaded into the “Representative Capacity” section of the Business Partner record without user intervention to determine the valid Fiduciary agreements.

The Duplicate Fiduciary Cleanup Report was loaded into Customer Relationship Management (CRM)/Business Partner in December 2013, and instructions for accessing the report were posted in Information Bulletin 6751. The intent was to create a semi-automated cleanup process in CRM, to allow County Office users to select any valid Fiduciary agreements, and automatically update the Business Partner record with the correct Representative Capacity data. Technical errors prevented the process from working properly, and ongoing system improvements were attempted, with updates provided in Information Bulletins 6789 and 6832.

In the meantime, many County Offices manually loaded the correct Fiduciary agreements into the “Representative Capacity” section of the Business Partner record.

Because of ongoing technical complications and reprioritization of resources, it was determined that the duplicate fiduciary records can best be handled by County Office users without a semi-automated CRM cleanup process.

Disposal Date	Distribution
January 1, 2015	State Offices; State Offices relay to County Offices

Notice CM-749

1 Overview (Continued)

B Purpose

This notice instructs State and County Offices that:

- the Duplicate Fiduciary Cleanup Report is available on the Program Delivery Branch web site, according to subparagraph 3 A, and is available for County Office review
- County Offices should load any **valid** Fiduciary agreements from the Duplicate Fiduciary Cleanup Report into the “Representative Capacity” section of the appropriate Business Partner record, if not already completed.

2 Action

A State Office Action

State Offices shall:

- ensure that County Offices are notified of the contents of this notice
- ensure that County Offices review the Duplicate Fiduciary Cleanup Report and load valid Fiduciary agreements into the “Representative Capacity” section of the appropriate Business Partner record according to this notice
- direct questions to either of the following:
 - Kerry Sefton by e-mail to **kerry.sefton@wdc.usda.gov**
 - Michelle Ontiveros by e-mail to **michelle.ontiveros@az.usda.gov**.

B County Office Action

County Offices shall:

- access the Duplicate Fiduciary Cleanup Report, according to subparagraph 3 A, and save a local copy
- filter the Duplicate Fiduciary Cleanup Report, as necessary, to view the appropriate State and county

Note: Review the records, paying close attention to the agreement type, effective date, and termination date.

- review the “Representative Capacity” section of the customer’s Business Partner record, checking to see if any valid Fiduciary agreements have already been loaded

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2 Action (Continued)

B County Office Action (Continued)

- compare the duplicate fiduciary records in the Duplicate Fiduciary Cleanup Report to FSA-211's and any other forms for Conservatorship, Guardianship, or Non-FSA Power of Attorney that are on file in the County Office
- load all valid Fiduciary agreements, as necessary, into the "Representative Capacity" section of the customer's Business Partner record, according to subparagraph 3 B
- disregard Fiduciary records from the Duplicate Fiduciary Cleanup Report that are duplicates, have expired, or were erroneous
- contact the State SCIMS security officer for assistance with instructions in this notice, as applicable.

3 Resources

A Accessing the Duplicate Fiduciary Cleanup Report

To access the Duplicate Fiduciary Cleanup Report, go to the Program Delivery Branch web site at <http://fsaintranet.sc.egov.usda.gov/ffas/farbill/ccc/>. Scroll down and under "SCIMS/Business Partner", CLICK "**Duplicate Fiduciary Cleanup Report**". Open the report and save a local copy.

B Loading "Representative Capacity" into the Business Partner Record

Refer to the following Work Instructions that are located on the MIDAS Portal in Bulletin Board > MIDAS Training Documents > Business Partner > Work Instructions:

- Create an FSA Power of Attorney at https://www.fsa.usda.gov/Internet/FSA_MIDAS/03_WI_Create_FSA_Power_Atty.pdf
- Create a Conservatorship at https://www.fsa.usda.gov/Internet/FSA_MIDAS/14_BP_Create_A_Conservatorship.pdf
- Create a Guardianship at https://www.fsa.usda.gov/Internet/FSA_MIDAS/05_WI_BP_Create_a_Guardianship.pdf.