UNITED STATES DEPARTMENT OF AGRICULTURE
Farm Service Agency
Washington, DC 20250

Notice MIDAS-31

For: State and County Offices

Temporary Workarounds for Business Partner (BP)

Approved by: Deputy Administrator, Farm Programs

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1 Overview

A Background

MIDAS BP Release 2.0 has been deployed and CRM/BP is now the system of record and entry for all customer records.

B Purpose

This notice provides guidance for handling instances when CRM functionality has a known defect and provides a temporary workaround for users until the defect is resolved in production.

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

2 Explanation of Defects and Workarounds

A Potential Duplicate Reports and Merge

Situation	Action
Merges involving **more than** 2 customer records are failing to delete the additional losing record(s) from SCIMS. Only the first losing record is being successfully deleted from SCIMS.	State Security Officers (SSO's) should only complete merges **on 2 customer records** at a time. Do not attempt a merge involving 3 or more customer records at a time.
The Potential Duplicate Report returns potential duplicate customer records with multiple addresses within the same ZIP code. The Report will display multiple line items for each BP record. Instead of displaying 2 line items for 2 records to be merged, it may display 6 line items for the 2 BP records with 3 addresses each. **Note:** If the BP has multiple addresses in different ZIP codes, this issue does not occur.	Be aware that some BP records may be listed multiple times. Only 1 of the line items for each BP record needs to be selected to continue with the merge.
The system runs the Duplicate Check and identifies a duplicate, often the "**BP is a Duplicate**" message is displayed twice in the message area.	Disregard the second message about the duplicate BP.
"Action" button at the top of the Potential Duplicate Report is labeled "MERGE", but should be labeled "RESOLVE".	Users should: • click the "MERGE" button to merge duplicates, identify records as "Not a Duplicate" or cancel • understand that "Merge" is not the only option when that button is clicked.

B Address Validations

Situation	Action
When editing an existing address in a BP record, the Carrier Route (CR), Bar Code (BC) and Congressional Voting District (CVD) will be loaded in the record. After editing the old address and running the address validation, the user will be prompted to "**Accept**" (the suggested address), "**Use Original Address**", or "**Cancel**". If the user selects "**Use Original Address**", the (CR), (BC), and (CVD) from the old address will remain in the record.	Users should **almost always** select "**Accept**" the suggested address, because it will auto-populate the record with the correct address and CVD, CR, & BC codes. However, if the user selects "**Use Original Address**", then he/she must always manually delete the old values for CVD, CR, BC and manually enter the new, correct values.
Address validation is not able to validate a Highway Contract (HC) address or modify an old HC address. The validated addresses do not reside in the USPS directory.	The HC address cannot be validated, user shall select "**Use Original Address**" and manually enter the CVD, CR, & BC codes.
When adding or updating a PO Box address, the address validation may be triggered multiple times.	User should select "**Accept**" the suggested address each time it is presented, to continue and save the record.

2 Explanation of Defects and Workarounds (Continued)

C Adding/Editing Customer Data Fields

Situation	Action
In SCIMS, when a last, first or business name was modified, SCIMS would prompt the user if he/she wanted to replicate the edit to the “Common Customer Name” field also. However, BP is pending development for this functionality. When the first, last, or business name is modified on a BP record, the user is not currently prompted with the option to replicate the name change to the “Common Customer Name” field.	Users should manually edit the “Common Customer Name” field when the first, last, or business name is changed, if applicable for the customer.
After a new BP record has been created, the system may take several minutes for the BP record to appear in search results.	Users should be aware of the slight delay and wait a few minutes before searching for the customer record, if a search is necessary.
When creating a new individual customer record (that is not part of an SSN family) the “Designated Paying Entity” flag should be automatically checked. Periodically, the automated system will not complete the task of automatically checking the “DPE” flag, resulting in the SSN not replicating to SCIMS.	Users should manually set the “DPE” flag and click “SAVE” for the customer record. The SSN will now be displayed in SCIMS.

D Change History

Situation	Action
Currently “Change History” in the BP record shows changes to customer records made by a user and includes automated changes made behind the scenes.	Users should be aware that additional information may be included in the “Change History” that may not be applicable to them.

E Attachments

Situation	Action
Instead of displaying the employee’s name in the “Created By” field on the “Attachment” assignment block of the BP record, the employee's F ID number will be displayed. The employee’s name should be displayed, similar to how it is displayed in the “Change History” assignment block.	The employee can be identified by performing an employee BP search using the given F ID number.

F Financial Services Assignment Block

Situation	Action
The "Amount" field on the “In Financial Services Assignment” block does not show the correct value for multiyear programs. The amount shown is the total amount of the assignment and not the amount per year.	Users should go to Financial Services to view the correct assignment amount for each year.
The **“Joint Payee”** data field on the Financial Services assignment block displays the account customer ID number, instead of the joint payee name.	Users should go to Financial Services to view the correct joint payee name.

2 Explanation of Defects and Workarounds (Continued)

G Key Field Change

Situation	Action
Searching the Key Field Change Request Report and using "Common Customer Name" as the search criteria, the customer is not found in the Results List .	Users should populate the field using all capital letters for the "Common Customer Name".
Searching the Key Field Change (KFC) Request Report using the "Service Center" and "Service Center Name", the page freezes and user must exit out of the KFC Report.	Users should use the "Partner Search Criteria" field instead.
Searching for a KFC Report using the search criteria of "Created By" (the end user) or "Changed By" (the SSO), the employee F ID is required.	Users should search for the F ID by going into "Search Employee", and entering the employing name. The F ID number will be displayed in the search Results List next to the employee's name.

H Product Master

Situation	Action
The Product Master Request Type ("**New Product**" or "**New Intended Use**") drop-down is missing from the New Product Request questionnaire.	User can proceed with completing the New Product Request without selecting the Request Type. User can use the notes area to identify the request type (new product or new intended use).

3 Action

A State Office Action

State Offices shall:

- ensure that County Offices are notified of the contents of this notice
- direct question to either of the following:

  - Michelle Ontiveros by email to **michelle.ontiveros@az.usda.gov**
  - Kerry Sefton by email to **kerry.sefton@wdc.usda.gov.**

B County Office Action

County Offices shall:

- contact their State Security Officer (SSO) according to 1-CM, Exhibit 11.5
- contact their State Change Agent, Super User, or BP Trainer.