Purpose

The purpose of this work instruction is to show how to create a Conservatorship.

Trigger

Perform this procedure when requested by customer.

Prerequisites

- The customer records for both the individual having the conservatorship and the person who will be the conservator must be in business partner.

Helpful Hints

- Start the procedure from the customer record of the individual who will have the conservatorship.
- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates the action is optional, and **C** indicates the action is conditional.
- The following notes may be used throughout this work instruction:

Note type	Icon	Description
A **general** note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A **cautionary** note		Use this note to communicate to the end-user of something that **MUST** be completed or another trigger that should be started and is related to the procedure.
A **critical** note		Use this note to specify something that **MUST NOT** be done during the procedure.

Contact someone	☎	Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A **reference** is available	🔍	Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

Procedure

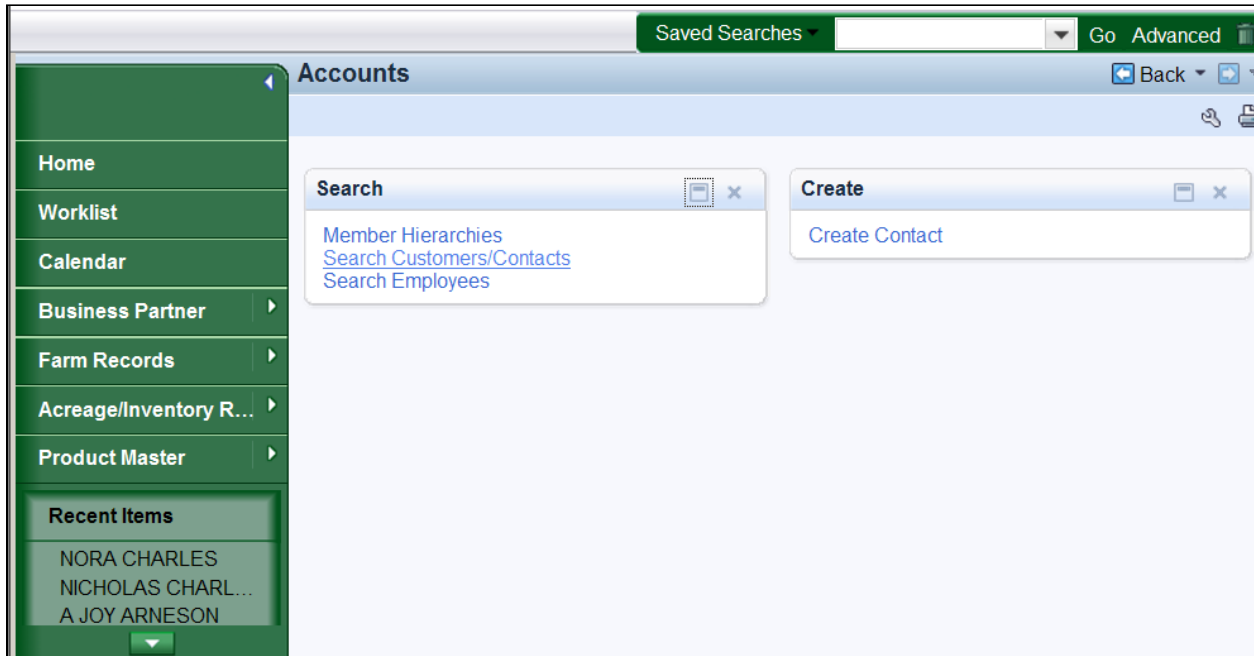1. Start the transaction from the MIDAS CRM Home Page.

Home
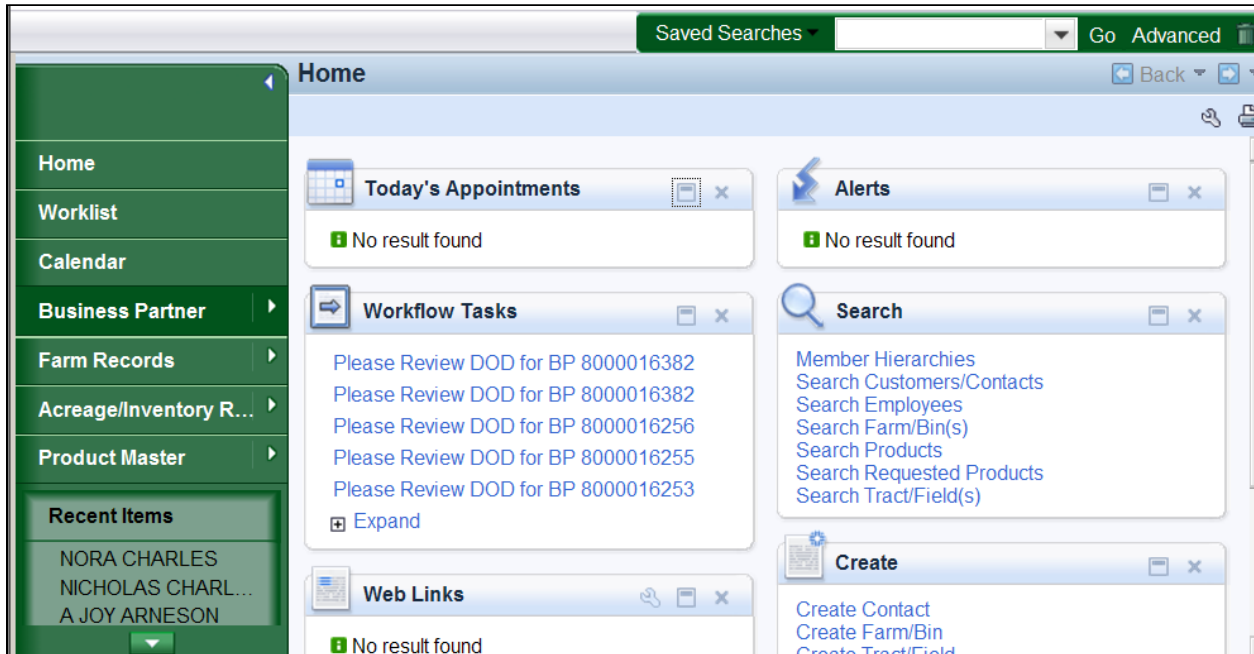
2.

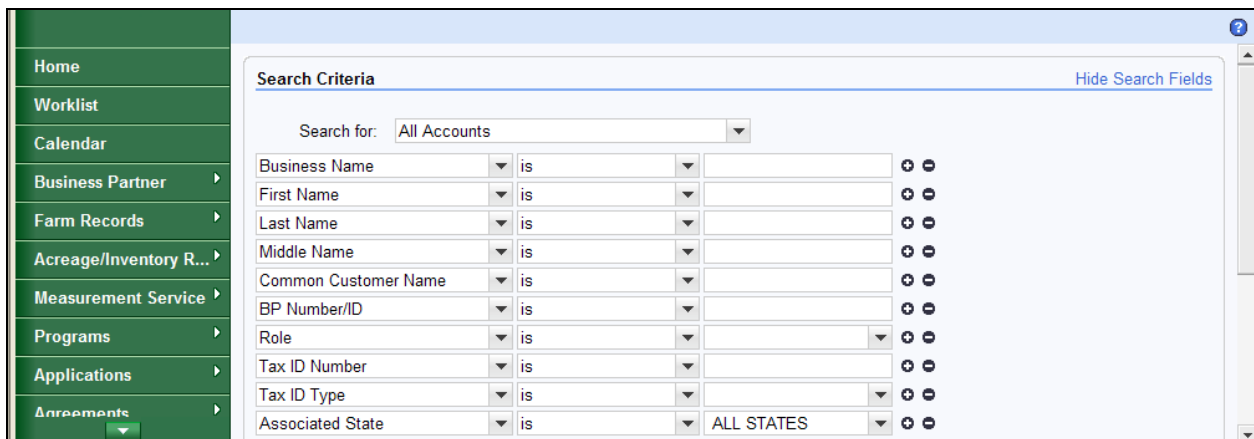   Click the **Business Partner** button ![Business Partner] to go to the Accounts page.

Accounts

3. Click the **Search Customers/Contacts** label Search Customers/Contacts to go to the Search: Customers page.

Search: Customers

4. Click text box [   ].

> Enter the search parameters. In this case the first and last name of the business partner.

5. As required, complete/review the following fields:

Field	R/O/C	Description

Field	R/O/C	Description
	R	**Example:** Katherine

Search: Customers

6. As required, complete/review the following fields:

Field	R/O/C	Description
Last Name	R	**Example:** Loyd

Search: Customers

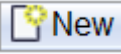**7.** Click Search button ![Search] .

Search: Customers

8. Select the Common Customer Name from the Result List (Katherine)KATHERINE LOYD to go to the Customer: XXXX

Customer: XXXX

9. Scroll down to the **Representative Capacity** tab.

Customer: XXXX (Representative Capacity)

10. Click the **New** button [New] for the **Representative Capacity** tab to go to

the Customer: XXXX (Fiduciary Relationships) page.

Customer: XXXX (Fiduciary Relationships)

11. Click the **Relationship Category** dropdown list icon ▾ to display the list of Relationship Categories.

Customer: XXXX (Fiduciary Relationships)

12. Select Has Conservatorship ⎣Has Conservator⎦ from the dropdown list for the Relationship Category.

Customer: XXXX (Conservator)

13. Click the **New** button [New] to open the **Full Name** entry field.

Customer: XXX (Conservator)

14. Click the **Full Name** field Open Input Help icon [icon] to go to the Search Criteria window.

Search: Customers

15. Click text box [   ].

> Enter the search parameters. In this case the first and last name of the business partner.

16. As required, complete/review the following fields:

Field	R/O/C	Description
	R	**Example:** Nora
	R	**Example:** Charles

Search: Customers

17. Click Search button .

Search Criteria

18. Select the Common Customer Name from the Result List (Nora Charles) NORA CHARLES to go to the Customer: XXXX (Conservator) page.

Service Center Search

State:		▼
County:		▼
	Search	

	Service Center	Name
ⓘ No result found		

19. Click the **State** dropdown list icon ▼ to display the list of states.

xxxx

▼ Conservator

New

Actions	Full Name	Relationship	Address
🗑	NORA CHARLES181	Has Conservator	FREDERICK MD 21701

Effective Date: 11/21/2012   Revoked/Cancelled ... 12/31/9999

Status: Active   Revoked/Cancelled ...

Signature Count:

Recording Office: Other Reason:

Stipulations:

20. Click Input Help button .

Service Center Search

21. Scroll down to the Receiving Office State.

22. Select the Receiving Office State (Maryland) Maryland .

Service Center Search

23. Click the **County** dropdown list icon [▼] to display the County Offices.

24. Scroll down to the County Office.

25. Select the County Office (Frederick) Frederick .

26. Click the **Search** button Search to display the County Office Service Center number.

Service Center Search

27. Select the Service Center number and name (62641) [62641] to populate the County Office Name in the **Receiving Office** field.

Customer: XXXX (Conservator)

28. Click the **Save & Back** button [Save & Back] to display the Save Confirmation window.

Submit Conservatorship

> Is all the data displayed complete and accurate? Conservatorship data can not be modified after it is submitted to database! By recording this, all other fiduciary relationships for this customer will be revoked! Are you sure you wish to continue?
>
> Yes   No

29. Click the **Yes** button [Yes] to confirm saving the conservatorship and to go to the Customer: XXXX (Representative Capacity) page.

Customer: XXXX (Representative Capacity)

30. Click the **Home** button [Home] to go to the Home page.

Result

You have created a Conservatorship.

Next Steps

Not applicable.