

## 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:

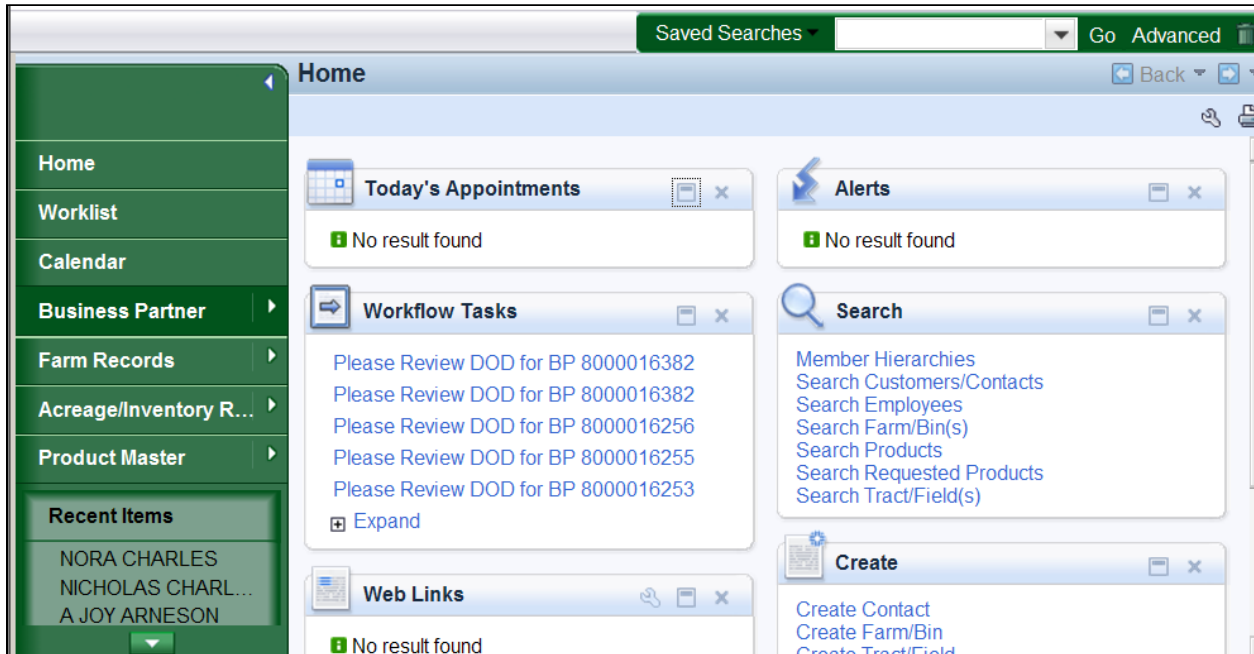
Note type	Icon	Description
A <b>general</b> note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A <b>cautionary</b> note		Use this note to communicate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

<p><b>Contact</b> someone</p>		<p>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.</p>
<p>A <b>reference</b> is available</p>		<p>Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.</p>

## Procedure

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

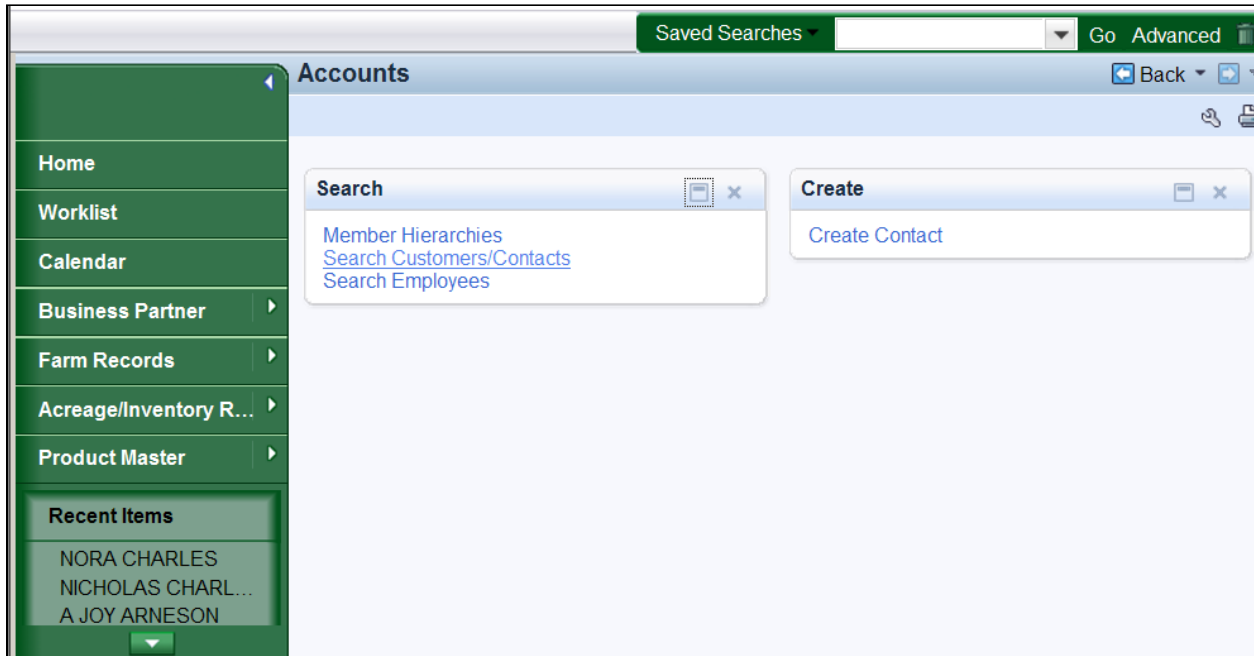
### Home



2. Click the **Business Partner** button  to go to the Accounts page.

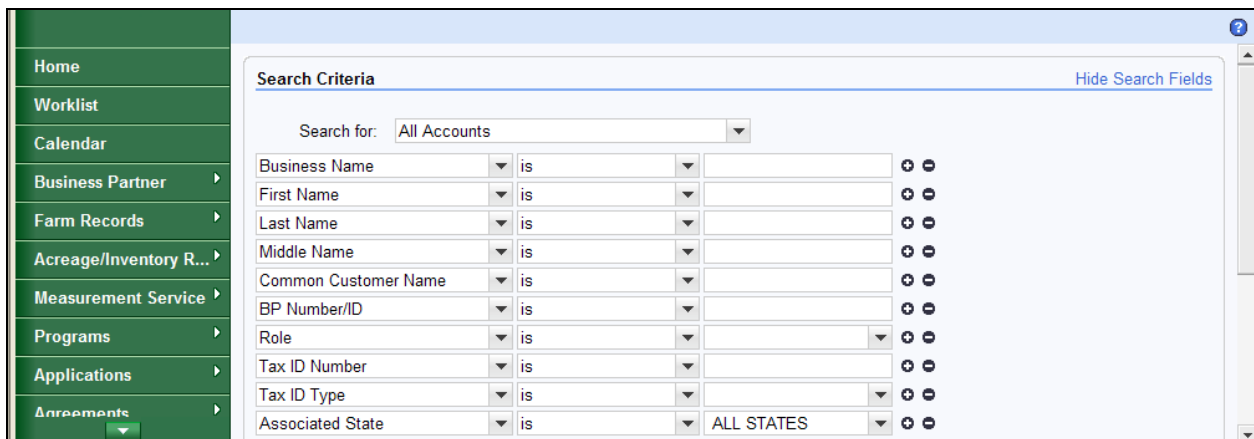



## Accounts



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
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Field	R/O/C	Description
	R	<b>Example:</b> Katherine

### Search: Customers

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

Field	R/O/C	Description
Last Name	R	<b>Example:</b> Loyd



## Search: Customers

Search: Customers

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

Inac...	BP Nu...	Common Customer N...	Tax ID Nu...	Tax ID Type	Street/...	City	State	ZIP Code	Telep...	E

7. Click Search button **Search**.

## Search: Customers

Search: Customers

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 1 Customer Found

Inac...	BP Nu...	Common Customer N...	Tax ID Nu...	Tax ID Type	Street/...	City	State	ZIP Code	Telep...	E-Mail
<input type="checkbox"/>	800001...	<a href="#">KATHERINE LOYD</a>	556084357	Social Se...	5678 M...	FREDE...	Maryland	21701		AKLo...

[KATHERINE LOYD]

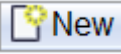
8. Select the Common Customer Name from the Result List (Katherine) [KATHERINE LOYD](#) to go to the Customer: XXXX



**Customer: XXXX**

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

**Customer: XXXX (Representative Capacity)**


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



the Customer: XXXX (Fiduciary Relationships) page.

### Customer: XXXX (Fiduciary Relationships)

A screenshot of a web application interface. At the top, there is a blue header bar with a downward-pointing arrow and the text "Representative Capacity Relationships". Below this, there is a white box containing the text "Relationship Category:" followed by a dropdown menu. The dropdown menu is open, showing a list of six options: "Has Conservator", "Has FSA Attorney in Fact", "Has Parent/Guardian", "Has Non-FSA Attorney in Fact", "Has Signature Authority", and "Has Spousal Signature Authority".

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

### Customer: XXXX (Fiduciary Relationships)

A screenshot of the same web application interface as above. The dropdown menu is open, and the first option, "Has Conservator", is highlighted with a blue background. The other options remain visible below it.

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





**Customer: XXXX (Conservator)**

▼ Conservator

New

Actions	Full Name	Relationship	Address
No result found			

Effective Date:  Revoked/Cancelled D...


Status: **Active** Revoked/Cancelled R...

Signature Count:

Receiving Office:

Stipulations:

Other Reason:

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

**Customer: XXX (Conservator)**

▼ Conservator

New

Actions	Full Name	Relationship	Address
		Has Conservator	

Effective Date:  Revoked/Cancelled ...


Status: **Active** Revoked/Cancelled ...

Signature Count:

Recording Office:

Stipulations:

Other Reason:

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



## Search: Customers

Home	Hide Search Fields		
Worklist	Search Criteria		
Calendar	Search for: All Accounts		
Business Partner	Business Name	is	
Farm Records	First Name	is	
Acreage/Inventory R...	Last Name	is	
Measurement Service	Middle Name	is	
Programs	Common Customer Name	is	
Applications	BP Number/ID	is	
Agreements	Role	is	
	Tax ID Number	is	
	Tax ID Type	is	
	Associated State	is	ALL STATES

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	<b>Example:</b> Nora
	R	<b>Example:</b> Charles



## Search: Customers

Saved Searches
Go Ad

- Home
- Worklist
- Calendar
- Business Partner
- Farm Records
- Acreege/Inventory R...
- Measurement Service
- Programs
- Applications
- Agreements
- Product Master
- Organizational Model

**Search: Customers**
✖ B

First Name	is		⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
Tax ID Type	is		⊕ ⊖
Tax ID Number	is		⊕ ⊖
Service Center	is		⊕ ⊖

Maximum Number of Results:

Save Search As:

**Result List**

New Customer

Inac...	BP Nu...	Common Customer N...	Tax ID Nu...	Tax ID Type	Street/...	City	State	ZIP Code	Telep...	E
<input type="checkbox"/>	800000...	<a href="#">NORA CHARLES</a>	5678 MA...	FREDER...	Maryland	21701				NoraLoy...

17. Click Search button Search

## Search Criteria

Search Criteria
Hide Search Fields

Search for:

Business Name	is		⊕ ⊖
First Name	is		⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
City	is		⊕ ⊖

Maximum Number of Results:

**Result List**

New Customer

Ina...	BP Num...	Common Customer...	Street/Ho...	City	State	ZIP Code	Telephone	E-Mail
<input type="checkbox"/>	800000...	<a href="#">NORA CHARLES</a>	5678 MA...	FREDER...	Maryland	21701		NoraLoy...



- 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:  ▼

Service Center	Name
<span style="color: green;">■</span> No result found	

- 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:

Status:  ▼

Signature Count:

Recording Office:

Stipulations:

Revoked/Cancelled ...

Revoked/Cancelled ...

Other Reason:

- Click Input Help button .



## Service Center Search

State:

County:

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado

Service Center

**No result found**

21. Scroll down to the Receiving Office State.
22. Select the Receiving Office State (Maryland) **Maryland**.

## Service Center Search

State:

County:

Service Center	Name
<b>No result found</b>	

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  to display the County Office Service Center number.



## Service Center Search

State:

County:

Service Center	Name
62641	FREDERICK COUNTY - MD

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

## Customer: XXXX (Conservator)

Customer: KATHERINE LOYD

Save & Back Cancel

**Conservator**

Actions	Full Name	Relationship
	NORA CHARLES FREDERICK MD...	Has Conservatorship

Effective Date:  Revoked/Can..:

Status:  Revoked/Can..:

Stipulations:  Other Reason:

Signature Co.:

Recording Off..:

Attach Docum...

28. Click the **Save & Back** button  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?

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

## Customer: XXXX (Representative Capacity)

Customer: KATHERINE LOYD

Save | Cancel | New | Determined acres | More

Addresses | Address Types | Address Independent Communication Numbers

New | History Data

A...	Address	Telephone/Ext.	Mobile	E-Mail
<input type="checkbox"/>	5678 MARTINI COURT...			

Representative Capacity | Relationships | Member Signatures

New | History Data

Acti...	Relationship	Authorized Signatory	Status	Effecti...	Revo...
<input type="checkbox"/>	Has Cons...	NORA CHARLES FR...	Active(Approved)	08.10....	31.1...

Program Participation | Associated Counties | FLP Customer

Edit

No result found

Member Share Percentage

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



## Result

You have created a Conservatorship.





## Next Steps

Not applicable.