



Purpose

The purpose of this work instruction is to show how to enter a signature and attach a signed FSA-211 to an FSA Power of Attorney within Business Partner.

Trigger

Perform this procedure when a completed and signed FSA-211 is presented by the customer.

Prerequisites

- A FSA- Power of Attorney must be "In Creation" status within Business Partner Representative Capacity.
- A signed FSA-211 is required before saving the FSA Power of Attorney with the status Active.
- In the case where the Customer granting the Power of Attorney is an organization, the individuals who can sign for the organization must be documented in the organization's customer record in the Member Signatures assignment block.

Helpful Hints

- Attaching the signed FSA-211 to the FSA Power of Attorney record is not required however, the functionality is available in Business Partner.
- "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.



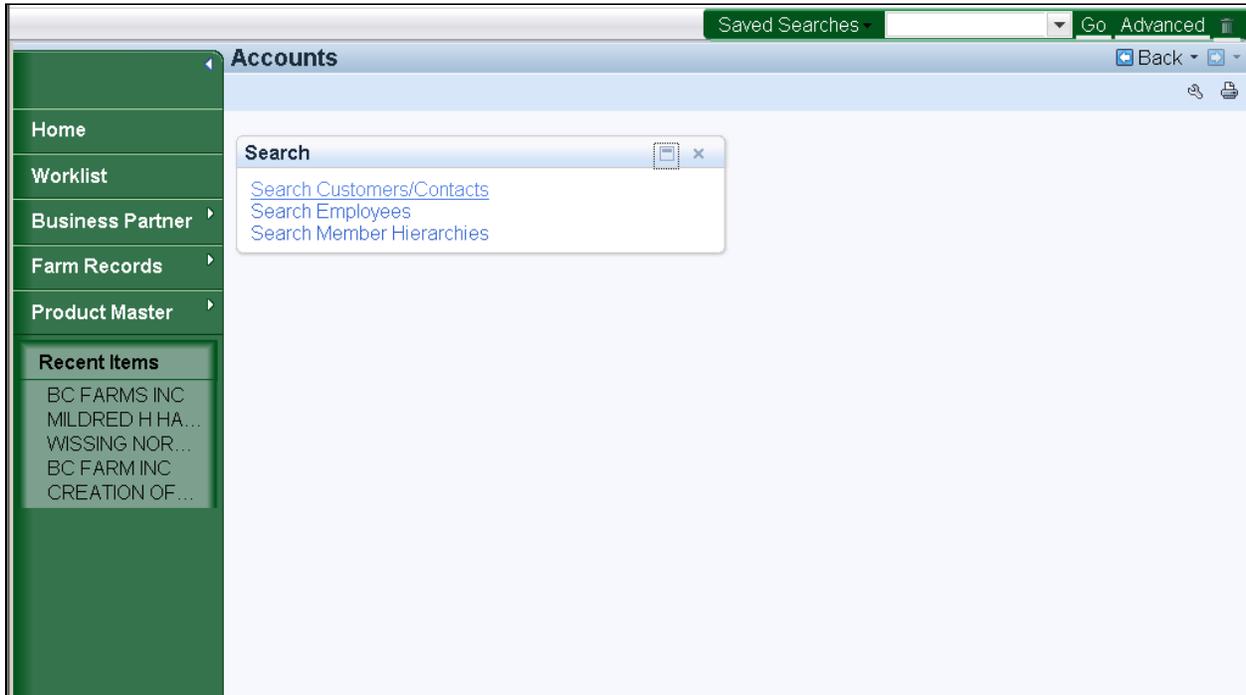
Procedure

Home

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



Accounts



2. Click the **Search Customers/Contacts** label [Search Customers/Contacts](#) to go to the Search Customer page.



Search: Customers

Saved Searches ▾
Go Advanced

Search: Customers
Back

Search for: All Accounts ▾

Business Name	is		⊕ ⊖
First Name	is		⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
Tax ID Number	is		⊕ ⊖
Tax ID Type	is		⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖

Maximum Number of Results: 100

Save Search As:

Result List

New Customer Print Copy Search

In...	BP...	Common Custom...	Tax ID...	Tax ID...	Add...	City	State	ZIP...	Tel...	E-...
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3. As required, complete/review the following fields:

Field	R/O/C	Description
Business Name	R	Business Partner name for corporation, LLC, general partnership, etc. Example: BC*



We are using the Wild Card * as part of our search criteria.



Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is	BC*	+	-
First Name	is		+	-
Last Name	is		+	-
Middle Name	is		+	-
Common Customer Name	is		+	-
BP Number/ID	is		+	-
Role	is		+	-
Tax ID Number	is		+	-
Tax ID Type	is		+	-
Associated State	is	ALL STATES	+	-

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

In...	BP...	Common Custom...	Tax ID...	Tax ID...	Add...	City	State	ZIP...	Tel...	E-...
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- Click the Search button **Search** to display the search results of the Business Name.



Search: Customers

Search: Customers

Search for: All Accounts

Business Name is BC*

First Name is

Last Name is

Middle Name is

Common Customer Name is

BP Number/ID is

Role is

Tax ID Number is

Tax ID Type is

Associated State is ALL STATES

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 2 Customers Found

New Customer

In...	BP...	Common Custom...	Tax ID...	Tax ID...	Add...	City	State	ZIP...	Tel...	E-...
<input type="checkbox"/>	800	BC FARMS INC	NOTA	No Ta	391	RU	Indi	461	+1	er1

- Click the **Common Customer Name** from the Result List **BC FARMS INC** [BC FARMS INC](#) to go to the Customer page.



Customer: BC FARMS INC

Customer: BC FARMS INC

Control Flags

Archived:
Inactive:

Addresses

Acti...	Address	Curr...	Valid From	Valid To
	391 S 350 E / RUSHVILLE IN 46173-7...	<input checked="" type="checkbox"/>	05.10.2012	31.12.9999

Representative Capacity

A...	Type	Business Partner	Status	Effective Date	Revoked/Canc...
	Has FSA Attorn...	MILDRED H HA...	In Creation	11.04.2013	31.12.9999

Program Participation

Associated Counties

- Click **Edit** button related to the Power of Attorney for MILDRED H HARRIS that is "In Creation" in the Representative Capacity assignment block, to go to the FSA Power of Attorney page.



You may have to Scroll to view the Representative Capacity assignment block.



Customer: BC FARMS INC FSA Power of Attorney

Customer: BC FARMS INC

Cancel Save & Back Print

FSA Power of Attorney

Attorney in Fact General Data

Attorney-In-Fact:	8000015875	Effective Date:*	11.04.2013
Full Name:	MILDRED H HARRIS	Status:	In Creation
State:	IN	Revoked/Cancelled Da...:	31.12.9999
County:	RUSH	Revoked/Cancelled Re...:	
Address:	1445 W 650 N	Source:	SAP
Receiving Office:	SHELBY - IN COUNTY OFFICE		

Attach Document: [Attach](#)

FSA, NRCS and CCC Programs New

Actions	Program
	All current and all future programs

Program Transactions New

7. Scroll to the **Signatures** assignment block.

Customer: BC FARMS INC FSA Power of Attorney

Customer: BC FARMS INC

Cancel Save & Back Print

All Farms Farm

No result found

Insured Crops New

All Crops Crop

No result found

Crop Insurance Transactions New

Actions	Transaction
	No result found

Signatures New

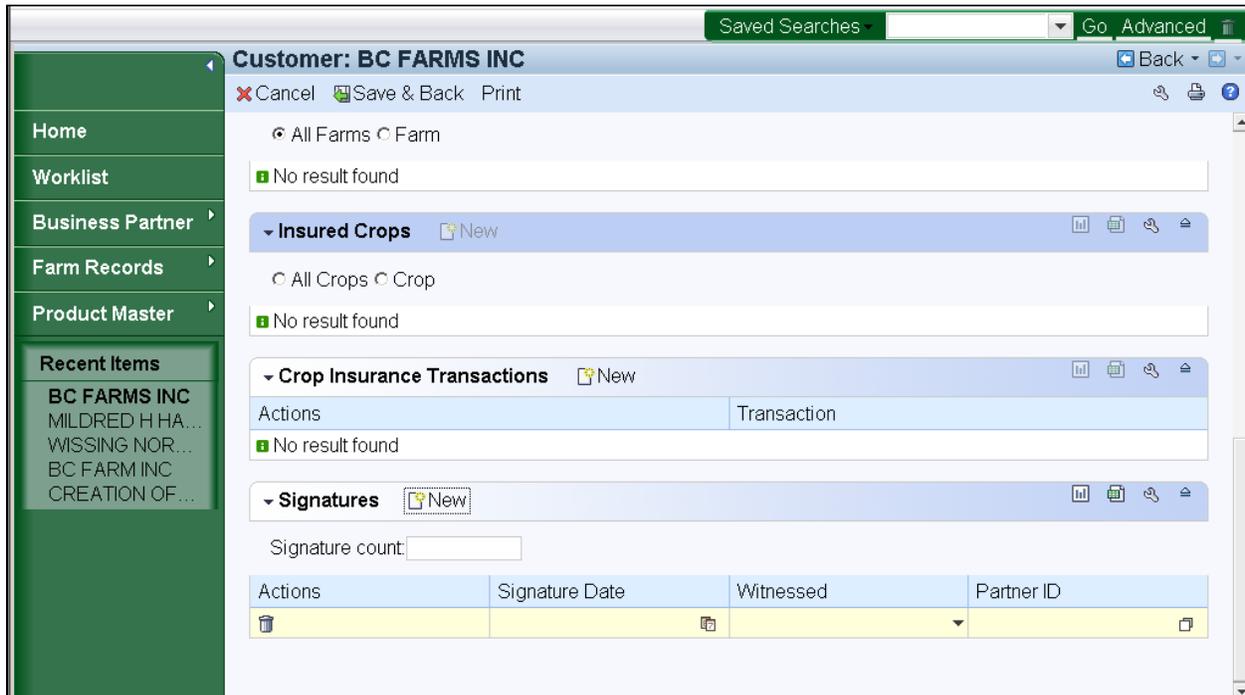
Signature count:

Actions	Signature Date	Witnessed	Partner ID
	No result found		



- Click **New** button  in the Signatures assignment block to open the signature fields, to record the authorized signature details.

Customer: BC FARMS INC



Customer: BC FARMS INC

Cancel Save & Back Print

All Farms Farm

No result found

Insured Crops New

All Crops Crop

No result found

Crop Insurance Transactions New

Actions	Signature Date	Witnessed	Partner ID

Signature count:

- Click the **Partner ID** Open Input Help icon  to go to the Search Criteria window.



Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for: Customer ▼

Business Name	▼	is	▼		⊕ ⊖
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	▼		⊕ ⊖
Legacy State	▼	is	▼	MARYLAND	⊕ ⊖
Legacy County	▼	is	▼	FREDERICK	⊕ ⊖

Maximum Number of Results:

Result List

New Customer 📄 🔍

Ina...	BP Num...	Common Customer N...	Tax I...	Tax I...	Addre...	City	State	ZIP C...	Telep...	E-Mail
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10. As required, complete/review the following fields:

Field	R/O/C	Description
First Name	R	Business Partner's First Name Example: J*
Last Name	R	Business Partner's Last Name Example: Taylor



Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for: Customer ▼

Business Name	▼	is	▼		⊕ ⊖
First Name	▼	is	▼	J	⊕ ⊖
Last Name	▼	is	▼	Taylor	⊕ ⊖
Middle Name	▼	is	▼		⊕ ⊖
Common Customer Name	▼	is	▼		⊕ ⊖
BP Number/ID	▼	is	▼		⊕ ⊖
Role	▼	is	▼		⊕ ⊖
Tax ID Type	▼	is	▼		⊕ ⊖
Tax ID Number	▼	is	▼		⊕ ⊖
Legacy State	▼	is	▼	MARYLAND	⊕ ⊖
Legacy County	▼	is	▼	FREDERICK	⊕ ⊖

Maximum Number of Results:

Result List

🔍 New Customer 📄 🔍

Ina...	BP Num...	Common Customer N...	Tax I...	Tax I...	Addre...	City	State	ZIP C...	Telep...	E-Mail
--------	-----------	----------------------	----------	----------	----------	------	-------	----------	----------	--------

11. Click the **Search** button to display the search results.



Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for: Customer ▼

Business Name	▼	is	▼		⊕	⊖
First Name	▼	is	▼	J*	⊕	⊖
Last Name	▼	is	▼	TAYLOR	⊕	⊖
Middle Name	▼	is	▼		⊕	⊖
Common Customer Name	▼	is	▼		⊕	⊖
BP Number/ID	▼	is	▼		⊕	⊖
Role	▼	is	▼		⊕	⊖
Tax ID Type	▼	is	▼		⊕	⊖
Tax ID Number	▼	is	▼		⊕	⊖
Legacy State	▼	is	▼	MARYLAND	⊕	⊖
Legacy County	▼	is	▼	FREDERICK	⊕	⊖

Maximum Number of Results:

Result List: 1 Customer Found

New Customer

	Ina...	BP Num...	Common Customer N...	Tax I...	Tax I...	Addre...	City	State	ZIP C...	Telep...	E-Mail
<input type="checkbox"/>		8000001...	JOHN E TAYLOR	55588...	Social...	5678...	FRED...	Maryl...	21701	+1 (70...	JTaylo...

12. Click the **Common Customer Name** from the Result List **JOHN E TAYLOR** [JOHN E TAYLOR](#) to select the customer.

John E Taylor is a member of BC Farms Inc and has signature authority for the organization.



Customer: BC FARMS INC FSA Power of Attorney

Customer: BC FARMS INC

Cancel Save & Back Print

All Farms Farm

No result found

Insured Crops New

All Crops Crop

No result found

Crop Insurance Transactions New

Actions	Transaction
No result found	

Signatures New

Signature count:

Actions	Signature Date	Witnessed	Partner ID
			JOHN E TAYLOR

Select Date

13. Click the **Select Date** button in the Signature Date column to go to the date selection calendar.



Customer: BC FARMS INC FSA Power of Attorney

Customer: BC FARMS INC

Cancel Save & Back Print

All Farms Farm

No result found

Insured Crops New

All Crops Crop

No result found

Crop Insurance Transactions New

Actions Transaction

No result found

April 2013

Mo	Tu	We	Th	Fr	Sa	Su
13	25	26	27	28	29	30
14	1	2	3	4	5	6
15	8	9	10	11	12	13
16	15	16	17	18	19	20
17	22	23	24	25	26	27
18	29	30	1	2	3	4

Signature count:

Actions Signature Date Witnessed Partner ID

JOHN E TAYLOR

14. Click the date (April 11, 2013 11) the FSA 211 was signed.

Customer: BC FARMS INC FSA Power of Attorney

Customer: BC FARMS INC

Cancel Save & Back Print

All Farms Farm

No result found

Insured Crops New

All Crops Crop

No result found

Crop Insurance Transactions New

Actions Transaction

No result found

Signatures New

Signature count:

Actions Signature Date Witnessed Partner ID

11.04.2013 JOHN E TAYLOR



15. Click **Witnessed** dropdown icon  to display the list of options.

Customer: BC FARMS INC FSA Power of Attorney

The screenshot shows the MIDAS software interface for 'Customer: BC FARMS INC'. The left sidebar contains navigation options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area is divided into sections: 'All Farms', 'Insured Crops', 'All Crops', 'Crop Insurance Transactions', and 'Signatures'. The 'Signatures' section is currently active, displaying a table with the following data:

Actions	Signature Date	FSA Witnessed/Notarized	Partner ID
	11.04.2013	Witnessed/Notarized (dropdown)	JOHN E TAYLOR

16. Click the appropriate **Witnessed** option for the FSA 211 Notarized
Notarized.



Customer: BC FARMS INC FSA Power of Attorney

Customer: BC FARMS INC

Cancel Save & Back Print

All Farms Farm

No result found

Insured Crops New

All Crops Crop

No result found

Crop Insurance Transactions New

Actions	Transaction
No result found	

Signatures New

Signature count:

Actions	Signature Date	Witnessed	Partner ID
	11.04.2013	Notarized	JOHN E TAYLOR

17. Scroll to the Attorney in Fact General Data assignment block.

Customer: BC FARMS INC

Customer: BC FARMS INC

Cancel Save & Back Print

Attorney in Fact General Data

Attorney-In-Fact: 8000015875 Effective Date: 04-11-2013

Full Name: MILDRED H HARRIS Status: In Creation

State: IN Revoked/Cancelled Date: 12-31-9999

County: RUSH Revoked/Cancelled Reason:

Address: 1445 W 650 N Source: SAP

Receiving Office: SHELBY - IN COUNTY OFFICE

Attach Document: Attach

FSA, NRCS and CCC Programs New

Actions	Program
	All current and all future programs

Program Transactions New

Actions	Transaction

18. Click Status dropdown icon to display Status options.



Customer: BC FARMS INC

Customer: BC FARMS INC

Attorney in Fact General Data

Attorney-In-Fact: 8000015875 Effective Date: 04-11-2013

Full Name: MILDRED H HARRIS Status: In Creation

State: IN Revoked/Cancelled Date: In Creation

County: RUSH Revoked/Cancelled Reason: Active

Address: 1445 W 650 N Source: SAP

Receiving Office: SHELBY - IN COUNTY OFFICE

Attach Document: [Attach](#)

FSA, NRCS and CCC Programs [New](#)

Actions	Program
	All current and all future programs

Program Transactions [New](#)

Actions	Transaction

19. Click **Active** | **Active** from the selection list.

Customer: BC FARMS INC

Customer: BC FARMS INC

Attorney in Fact General Data

Attorney-In-Fact: 8000015875 Effective Date:

Full Name: MILDRED H HARRIS Status: Active

State: IN Revoked/Cancelled Date: 12-31-9999

County: RUSH Cancelled/Revoked Reason:

Address: 1445 W 650 N Source: SAP

Receiving Office: SHELBY - IN COUNTY OFFICE

Attach Document: [Attach](#)

FSA, NRCS and CCC Programs [New](#)

Actions	Program
	All current and all future programs

Program Transactions [New](#)

Actions	Transaction

Expand message area (1)

20. Click the **Expand message area** button (1) to display notifications.



Customer: BC FARMS INC

Customer: BC FARMS INC

Attorney in Fact General Data

Attorney-In-Fact: 8000015875 Effective Date: *

Full Name: MILDRED H HARRIS Status: Active

State: IN Revoked/Cancelled Date: * 12-31-9999

County: RUSH Cancelled/Revoked Reason:

Address: 1445 W 650 N Source: SAP

Receiving Office: SHELBY - IN COUNTY OFFICE

Attach Document: [Attach](#)

FSA, NRCS and CCC Programs [New](#)

Actions Program

Program All current and all future programs

Program Transactions [New](#)

Transaction

21. Click the **Select Date** button  in the Effective Date field.

Customer: BC FARMS INC

Customer: BC FARMS INC

Attorney in Fact General Data

Attorney-In-Fact: 8000015875 Effective Date: *

Full Name: MILDRED H HARRIS Status: Active

State: IN Revoked/Cancelled Date: * 12-31-9999

County: RUSH Cancelled/Revoked Reason:

Address: 1445 W 650 N Source: SAP

Receiving Office: SHELBY - IN COUNTY OFFICE

Attach Document: [Attach](#)

FSA, NRCS and CCC Programs [New](#)

Actions Program

Program All current and all future programs

Program Transactions [New](#)

Transaction

22. Click the **Effective Date** from the Calendar.



You must re-enter the effective date when you change the Status from "In Creation" to "Active".



Customer: BC FARMS INC

Customer: BC FARMS INC

Attorney in Fact General Data

Attorney-In-Fact: 8000015875 Effective Date: 04-16-2013

Full Name: MILDRED H HARRIS Status: Active

State: IN Revoked/Cancelled Date: 12-31-9999

County: RUSH Cancelled/Revoked Reason:

Address: 1445 W 650 N Source: SAP

Receiving Office: SHELBY - IN COUNTY OFFICE

Attach Document: [Attach](#)

FSA, NRCS and CCC Programs [New](#)

Program: All current and all future programs

Program Transactions [New](#)

Transaction

23. Click **Collapse message area** button to close notifications.

Customer: BC FARMS INC

Customer: BC FARMS INC

Attorney in Fact General Data

Attorney-In-Fact: 8000015875 Effective Date: 04-16-2013

Full Name: MILDRED H HARRIS Status: Active

State: IN Revoked/Cancelled Date: 12-31-9999

County: RUSH Cancelled/Revoked Reason:

Address: 1445 W 650 N Source: SAP

Receiving Office: SHELBY - IN COUNTY OFFICE

Attach Document: [Attach](#)

FSA, NRCS and CCC Programs [New](#)

Program: All current and all future programs

Program Transactions [New](#)

Transaction

24. Click **Attach Document** button to go to the Attachment window.



Attachment of the signed FSA-211 to the FSA Power of Attorney record is optional. Whether the document is attached in Business Partner or not, a signed FSA-211 is required before the power of attorney will be active.



Attachment

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you choose to enter a name, this name is displayed in the attachment list. If you do not enter a name, the file name is displayed.

Search Document

Document from Content Management:

Attach as Link:

Upload Document From Local Hard Disk

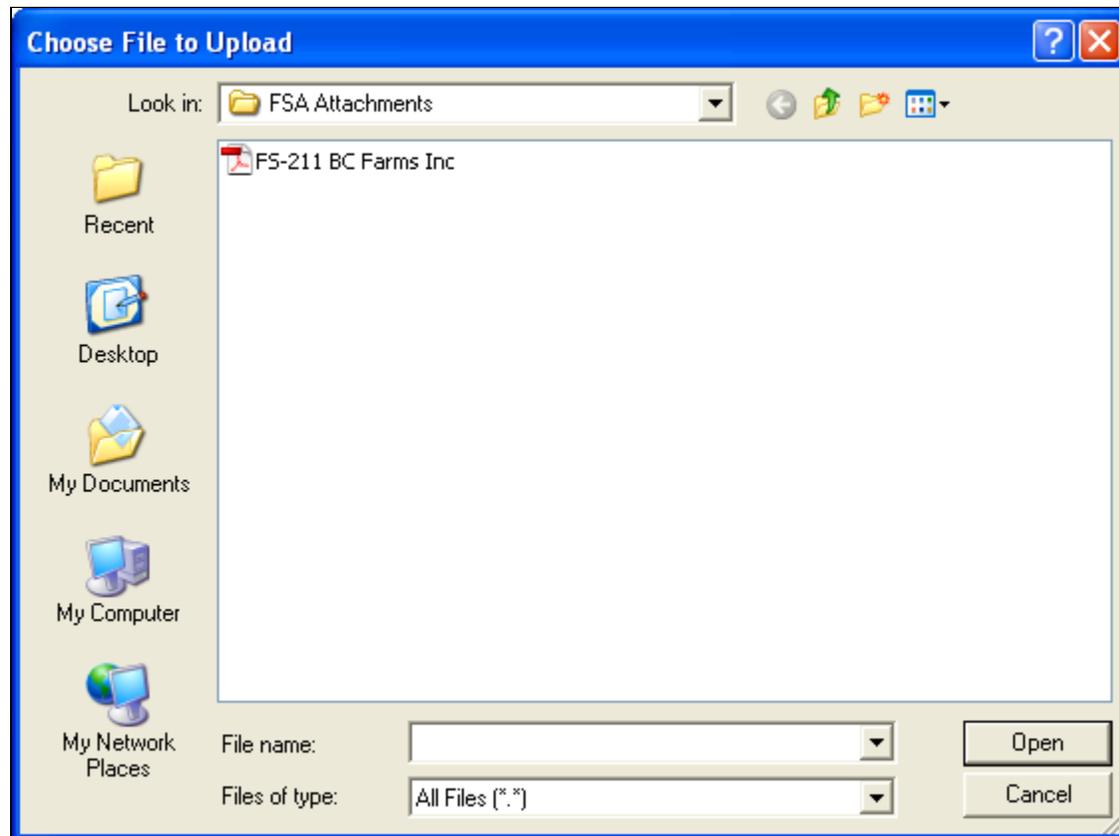
Name:

Description:

Upload Document From Local Hard Disk:

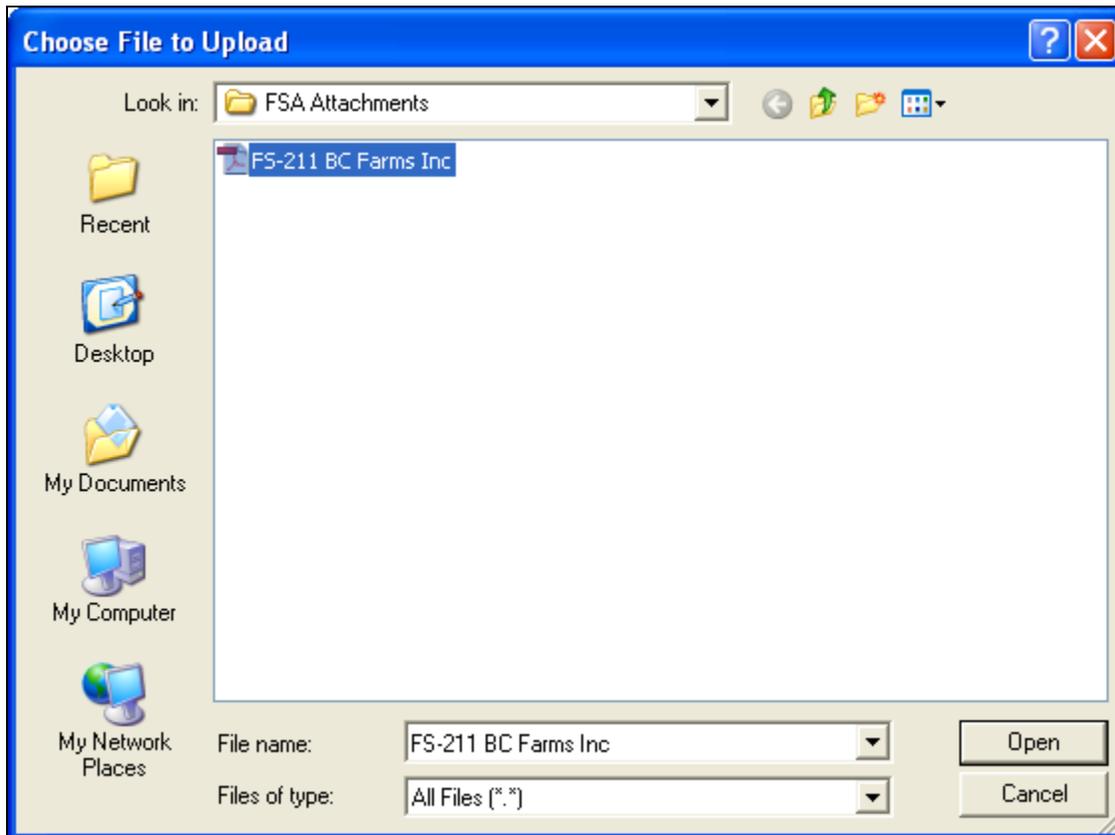
25. Click the **Browse** button to go to the Choose File to Upload window.

Choose File to Upload



26. Click the customer's signed **FSA-211 Signed FSA POA for BC FarmInc.pdf**  FS-211 BC Farms Inc that was scanned and signed.

Choose File to Upload



27. Click **Open** button  to go to the Attachment window.



Attachment

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you choose to enter a name, this name is displayed in the attachment list. If you do not enter a name, the file name is displayed.

Search Document

Document from Content Management:

Attach as Link:

Upload Document From Local Hard Disk

Name:

Description:

Upload Document From Local Hard Disk:

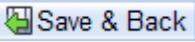
28. Click **Attach** button to complete the Attachment of the FSA-211 to the FSA Power of Attorney record in Business Partner.

Customer: BC FARMS INC

29. Click Expand message area button to display notifications.



Customer: BC FARMS INC

30. Click the **Save & Back** button  to go to the Submit Power of Attorney window.

Submit Relationship

Is all the data displayed complete and accurate? Active representative capacity data cannot be modified after it is submitted. It can only be revoked. Are you sure you wish to continue?

31. Click the **Yes** button  to save the FSA Power of Attorney after it is verified complete and accurate, and to go to the Customer Representative Capacity page.



Customer: BC FARMS INC

Customer: BC FARMS INC

Save | Cancel | Fact Sheet | PDF Fact Sheet | More

Inactive:

Addresses | Address Types | Communication Numbers | E-Mails

New

Actions	Address	Current	Valid From	Valid To
	391 S 350 E / RUSHVILLE IN 46173-7847	<input checked="" type="checkbox"/>	10/05/2012	12/31/9999

Representative Capacity | Relationships | Member Signatures

New | History Data

Actions	Type	Business Partner	Status	Effective Date	Revoked/Cancelled Date
	Has FSA Attorney in Fact	MILDRED H HARRIS	Active	04/16/2013	12/31/9999

Program Participation | Associated Countries

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	SHELBY - IN COUNTY OFFICE	Has interest in the program	Application made

Member Share Percentage

Member Share History

Hierarchy Node	Description	Valid From	Valid To	Share Percentage	Account share Sta...	Determination Date	Position Title Name
No result found							

32. Click **MILDRED H HARRIS** link [MILDRED H HARRIS](#) to go to the Customer page.



The FSA Power of Attorney Status now reflects active.

Customer: MILDRED H HARRIS

Customer: MILDRED H HARRIS

Save | Cancel | Fact Sheet | PDF Fact Sheet | More

Archived:
Inactive:

Addresses | Address Types | Communication Numbers | E-Mails

New

Actions	Address	Current	Valid From	Valid To
	1445 W 650 N / RUSHVILLE IN 46173-9352	<input checked="" type="checkbox"/>	10/05/2012	12/31/9999

Representative Capacity | Relationships

New | History Data

Actions	Type	Business Partner	Status	Effective Date	Revoked/Canc...
	Is FSA Attorney in Fact	BC FARMS INC	Active	04/16/2013	12/31/9999

Program Participation | Associated Countries

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant

33. Click **Home** button [Home](#) to return to the Home Screen.



Here you can review that Mildred H Harris is the Attorney in Fact for BC Farms. This relationship cannot be edited from this record.



Result

You have activated an FSA Power of Attorney and attached the signed document in the system.



Next Steps

You have %s.