



Purpose

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

Trigger

Perform this procedure when a Guardianship must be created.

Prerequisites

- A customer record for the person who will have a Guardian must be saved in Business Partner.
- The customer record for the person who will have a Guardian must include a birth date that reflects the individual is under 18 years of age.
- The customer record for the person who will be the Guardian must be in Business Partner.

Helpful Hints

- "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:

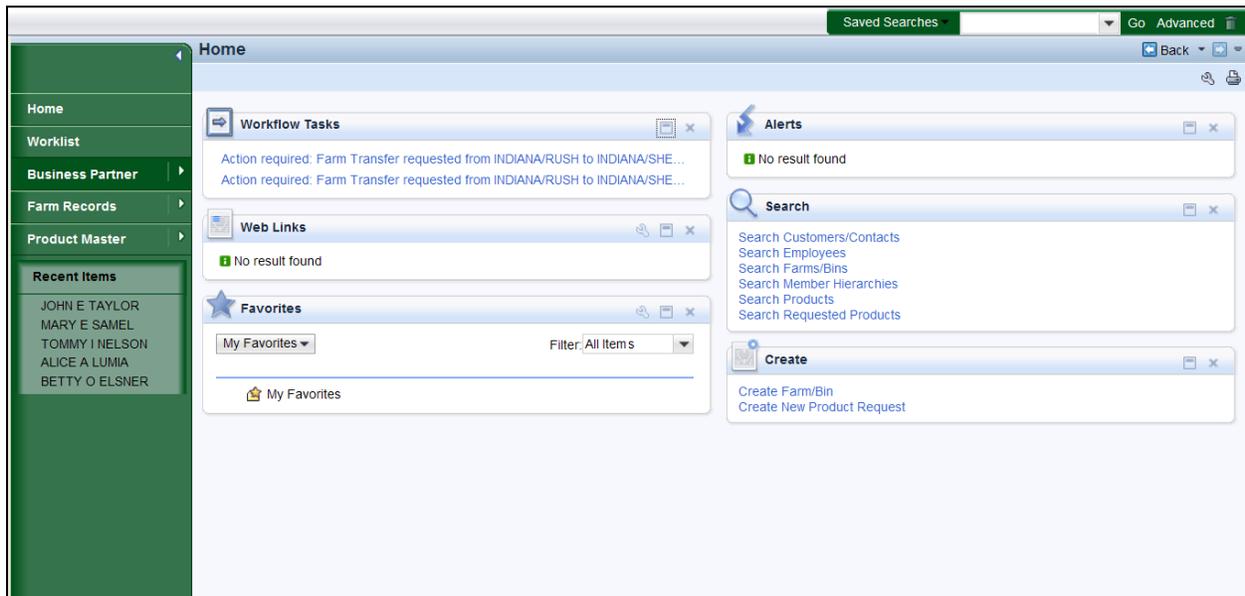
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the 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

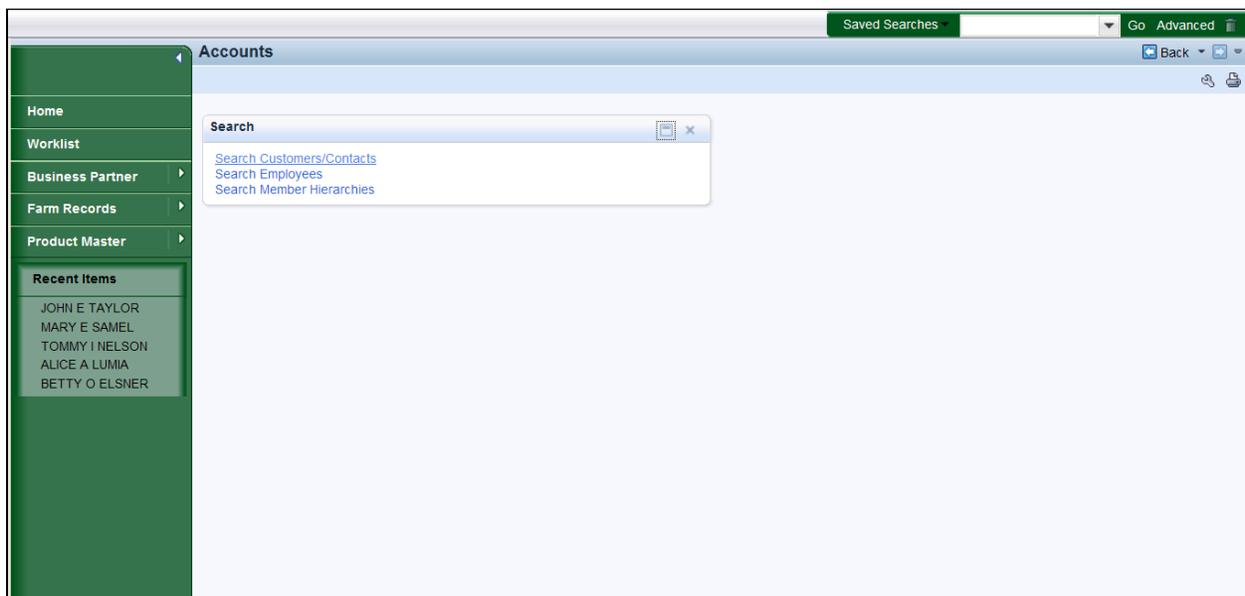
1. Start the transaction from the MIDAS CRM Home Page.

Home



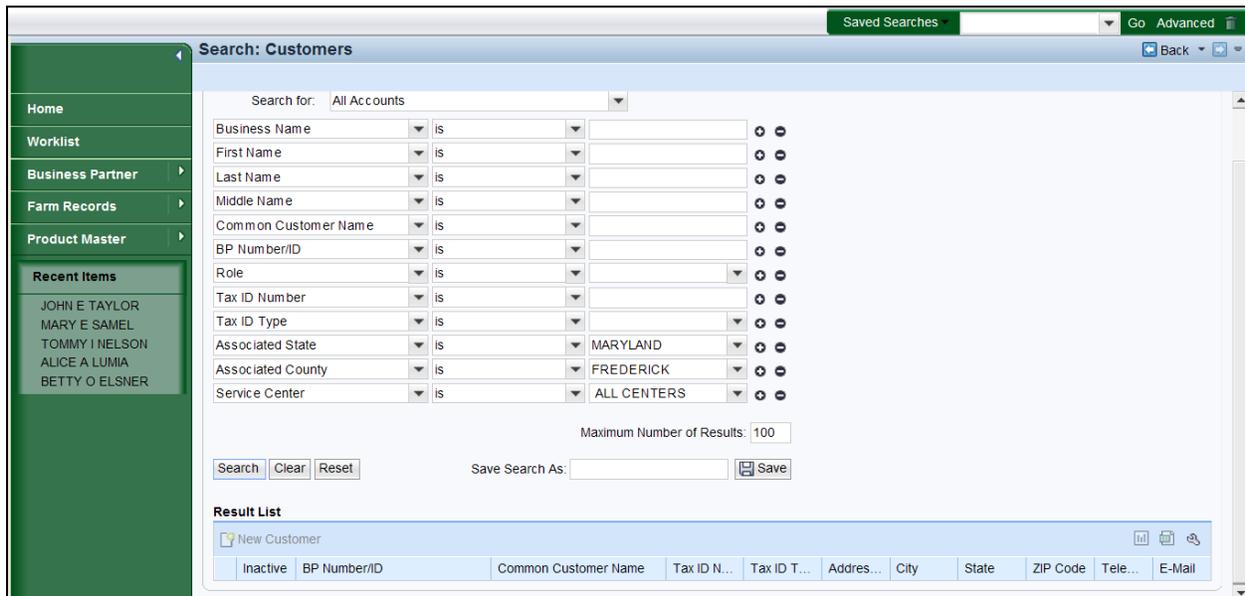
2. Click the **Business Partner** button  to go to the Accounts page.

Accounts



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

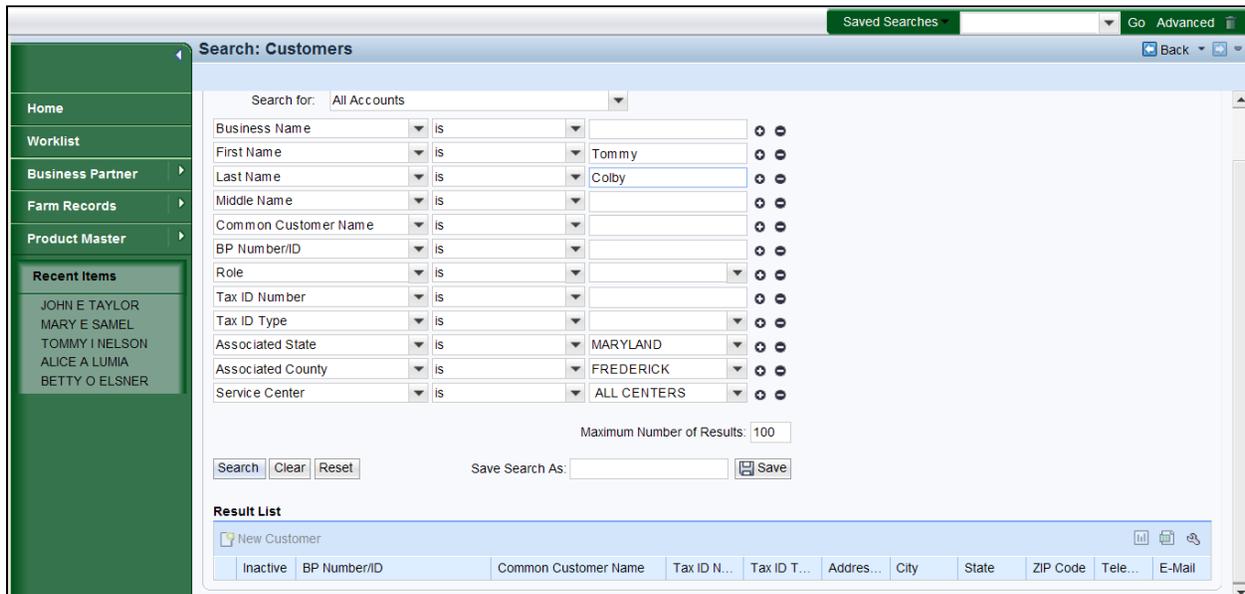
Search: Customers



- As required, complete/review the following fields:

Field	R/O/C	Description
First Name	R	Business Partner's First Name Example: Tommy
Last Name	R	Business Partner's Last Name Example: Colby

Search: Customers



Search: Customers

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

Associated County is

Service Center is

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

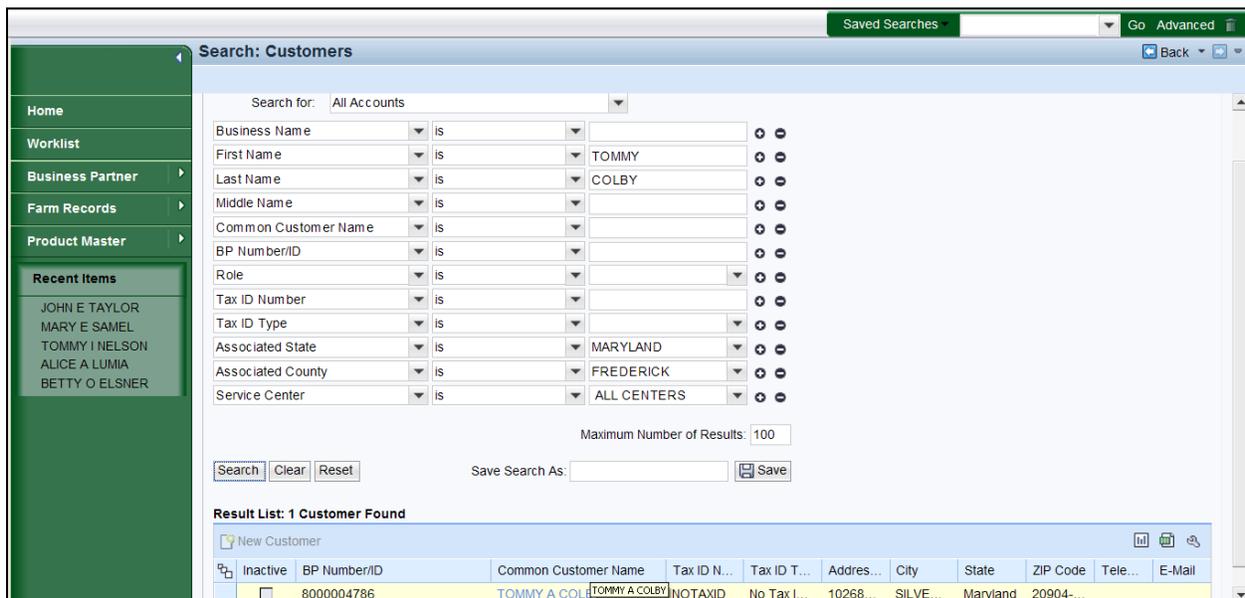
Result List

New Customer

Inactive	BP Number/ID	Common Customer Name	Tax ID N...	Tax ID T...	Address...	City	State	ZIP Code	Tele...	E-Mail
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- Click the **Search** button [Search](#) to display the Search Results for the First and Last Name entered.

Search: Customers



Search: Customers

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

Associated County is

Service Center is

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 1 Customer Found

New Customer

Inactive	BP Number/ID	Common Customer Name	Tax ID N...	Tax ID T...	Address...	City	State	ZIP Code	Tele...	E-Mail
<input type="checkbox"/>	8000004786	TOMMY A. COLBY	NOTAXID	No Tax I...	10268...	SILVE...	Maryland	20904...		

- Select the **Common Customer Name** from the Result List (Tommy Colby) [TOMMY A COLBY](#) to go to the Customer page.



Customer: TOMMY A COLBY

Customer: TOMMY A COLBY

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

Customer Details | Customer Profile | Roles | Identification Numbers

General Data

Current Role: Individual
 BP Number / ID: 8000004786
 Prefix:
 First Name: TOMMY
 Middle Name: A
 Last Name: COLBY
 Suffix:
 Last Name at Birth:
 Legal Name: No
 Common Customer Name: TOMMY A COLBY
 Language Preference: English
 Data Origin: SCIMS
 Employee Type: Not an employee
 Tax ID Type: No Tax ID Type
 Tax ID Number: No Tax ID Number

Main Address and Communication Data

Information Line:
 Address Line: 10268 MAIN ST.
 PO Box:
 City: SILVER SPRING
 State: MD Maryland
 ZIP Code: 20904-2920
 Country: US USA
 Telephone Number:
 E-Mail Address:
 Communication Method: Post (letter)

Notes

7. Click the **Customer Profile** tab **Customer Profile** to display the date of birth.
8. Note the Date of Birth to determine the date upon which the Customer turns 18 and the Guardianship should be revoked. Click the **Customer Details** tab **Customer Details**.

Customer: TOMMY A COLBY

Customer: TOMMY A COLBY

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

Customer Details | Customer Profile | Roles | Identification Numbers

General Data

Current Role: Individual
 BP Number / ID: 8000004786
 Prefix:
 First Name: TOMMY
 Middle Name: A
 Last Name: COLBY
 Suffix:
 Last Name at Birth:
 Legal Name: No
 Common Customer Name: TOMMY A COLBY
 Language Preference: English
 Data Origin: SCIMS
 Employee Type: Not an employee
 Tax ID Type: No Tax ID Type
 Tax ID Number: No Tax ID Number

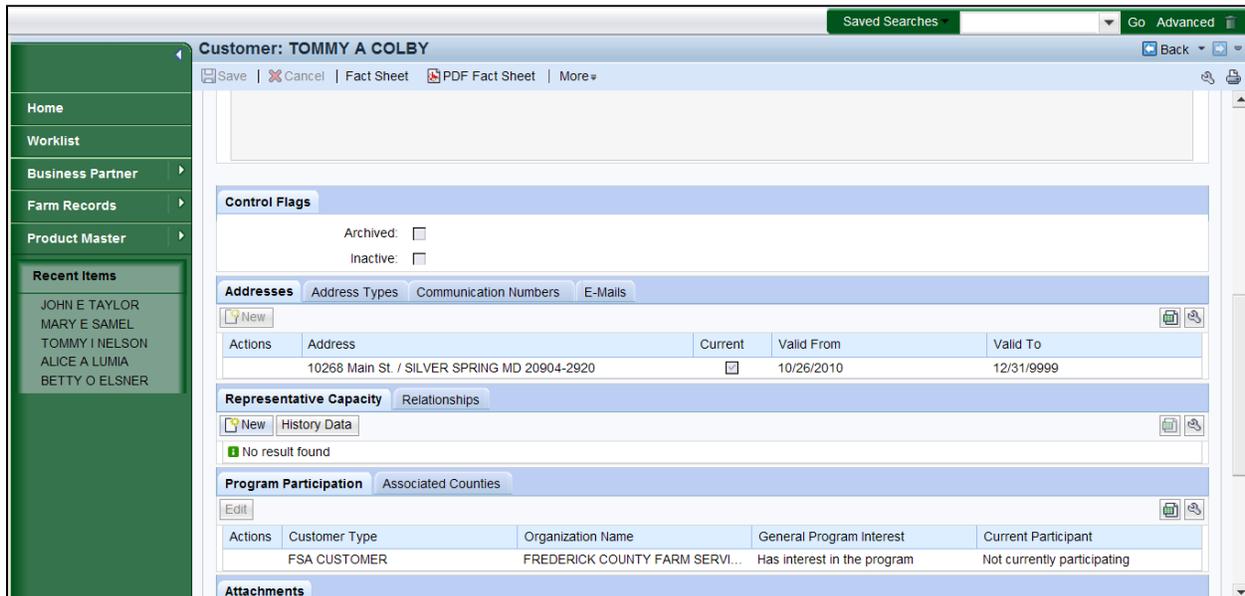
Main Address and Communication Data

Information Line:
 Address Line: 10268 MAIN ST.
 PO Box:
 City: SILVER SPRING
 State: MD Maryland
 ZIP Code: 20904-2920
 Country: US USA
 Telephone Number:
 E-Mail Address:
 Communication Method: Post (letter)

Notes

9. Scroll to display the Representative Capacity tab.

Customer: TOMMY A COLBY

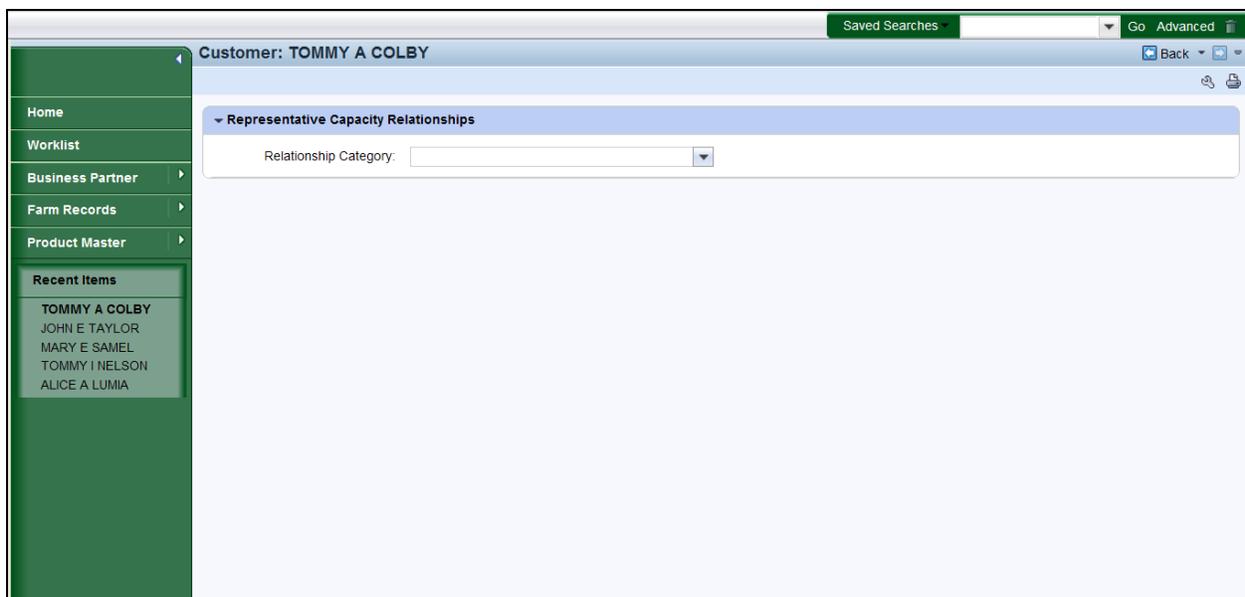


The screenshot shows the customer profile for Tommy A Colby. The left sidebar contains navigation options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items (listing John E Taylor, Mary E Samel, Tommy I Nelson, Alice A Lumia, and Betty O Elnser). The main content area has tabs for Control Flags, Addresses, Representative Capacity, Program Participation, and Attachments. The Representative Capacity tab is active, showing a 'New' button and a message 'No result found'.

10. Click the **New** button  in the **Representative Capacity** tab.

 Scrolling may be required to display the **Representative Capacity** tab.

Customer: TOMMY A COLBY

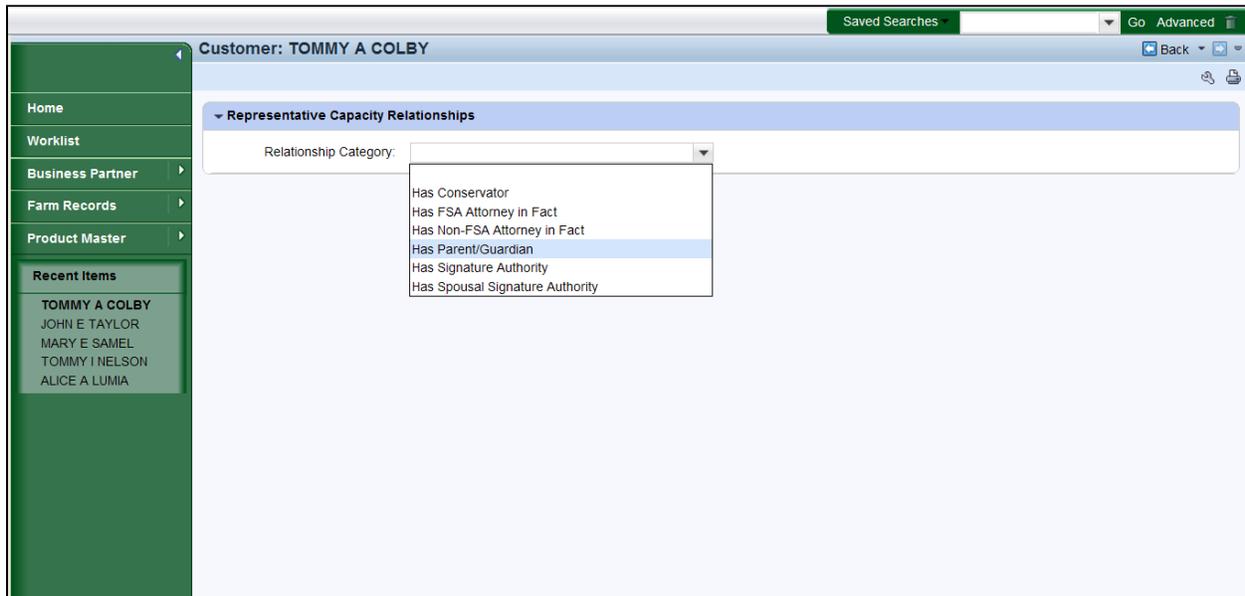


The screenshot shows the customer profile for Tommy A Colby with the Representative Capacity Relationships tab selected. The left sidebar is the same as in the previous screenshot, but the Recent Items list now includes Tommy A Colby. The main content area shows a 'Relationship Category' dropdown menu.

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

Relationship Categories.

Customer: TOMMY A COLBY



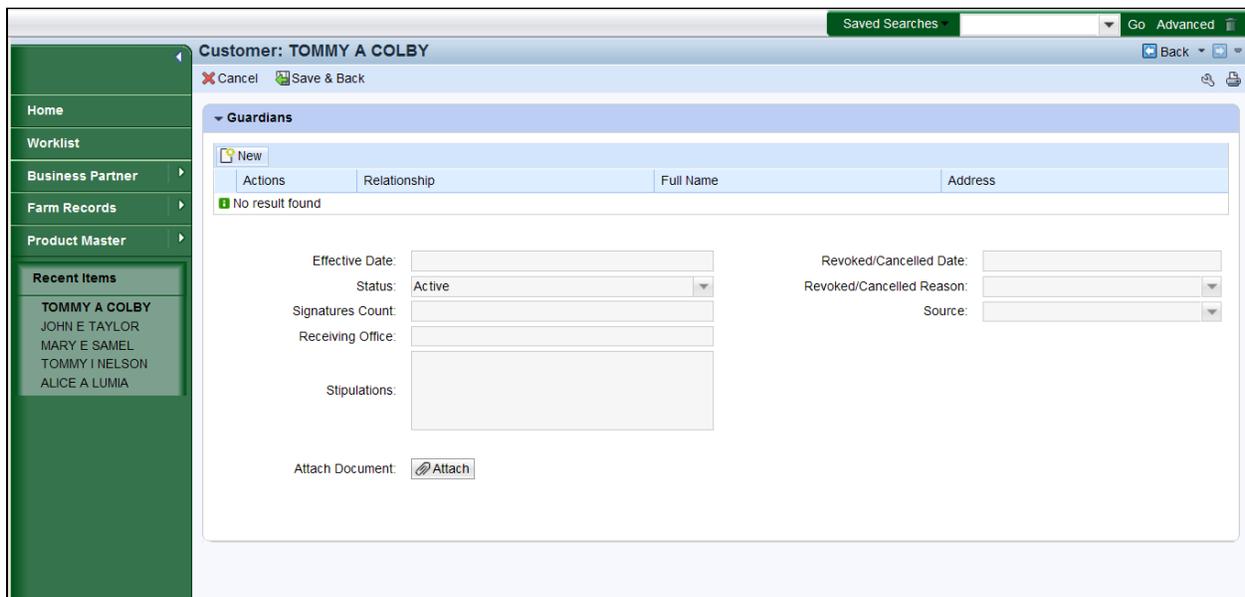
Customer: TOMMY A COLBY

Relationship Category:

- Has Conservator
- Has FSA Attorney in Fact
- Has Non-FSA Attorney in Fact
- Has Parent/Guardian
- Has Signature Authority
- Has Spousal Signature Authority

12. Select **Has Parent/Guardian** from the dropdown list in the Relationship Category.

Customer: TOMMY A COLBY



Customer: TOMMY A COLBY

Cancel Save & Back

New

Actions	Relationship	Full Name	Address
No result found			

Effective Date:

Status: Active

Signatures Count:

Receiving Office:

Stipulations:

Attach Document:

Revoked/Cancelled Date:

Revoked/Cancelled Reason:

Source:

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



Customer: TOMMY A COLBY

Customer: TOMMY A COLBY

Cancel Save & Back

Guardians

Actions	Relationship	Full Name	Address
	Has Parent/Guardian		

Open Input Help

Effective Date:

Status: Active

Signatures Count:

Receiving Office:

Stipulations:

Attach Document:

Revoked/Cancelled Date:

Revoked/Cancelled Reason:

Source:

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

Search Criteria

Search Criteria [Hide Search Fields](#)

Search for:

Business Name	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Name	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middle Name	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Common Customer Name	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
BP Number/ID	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax ID Type	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax ID Number	is	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legacy State	is	<input type="text" value="MARYLAND"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legacy County	is	<input type="text" value="FREDERICK"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Center	is	<input type="text" value="ALL CENTERS"/>	<input type="checkbox"/>	<input type="checkbox"/>

Maximum Number of Results:

Result List: 0 Customers Found

[New Customer](#)

Inac...	BP Numb...	Common Customer Name	Tax ID...	Tax ID...	Addre...	City	State	ZIP Co...	Telep...	E-Mail
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15. As required, complete/review the following fields:

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



Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for:

Business Name	▼	is	▼	<input type="text"/>	⊗ ⊖
First Name	▼	is	▼	John	⊗ ⊖
Last Name	▼	is	▼	Taylor	⊗ ⊖
Middle Name	▼	is	▼	<input type="text"/>	⊗ ⊖
Common Customer Name	▼	is	▼	<input type="text"/>	⊗ ⊖
BP Number/ID	▼	is	▼	<input type="text"/>	⊗ ⊖
Role	▼	is	▼	<input type="text"/>	⊗ ⊖
Tax ID Type	▼	is	▼	<input type="text"/>	⊗ ⊖
Tax ID Number	▼	is	▼	<input type="text"/>	⊗ ⊖
Legacy State	▼	is	▼	MARYLAND	⊗ ⊖
Legacy County	▼	is	▼	FREDERICK	⊗ ⊖
Service Center	▼	is	▼	ALL CENTERS	⊗ ⊖

Maximum Number of Results:

Result List: 0 Customers Found

New Customer

Inac...	BP Numb...	Common Customer Name	Tax ID...	Tax ID...	Addre...	City	State	ZIP Co...	Telep...	E-Mail
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16. Click the **Search** button to list the Customers meeting the search criteria.



Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for: Customer

Business Name	is			
First Name	is	JOHN		
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		
Service Center	is	ALL CENTERS		

Maximum Number of Results:

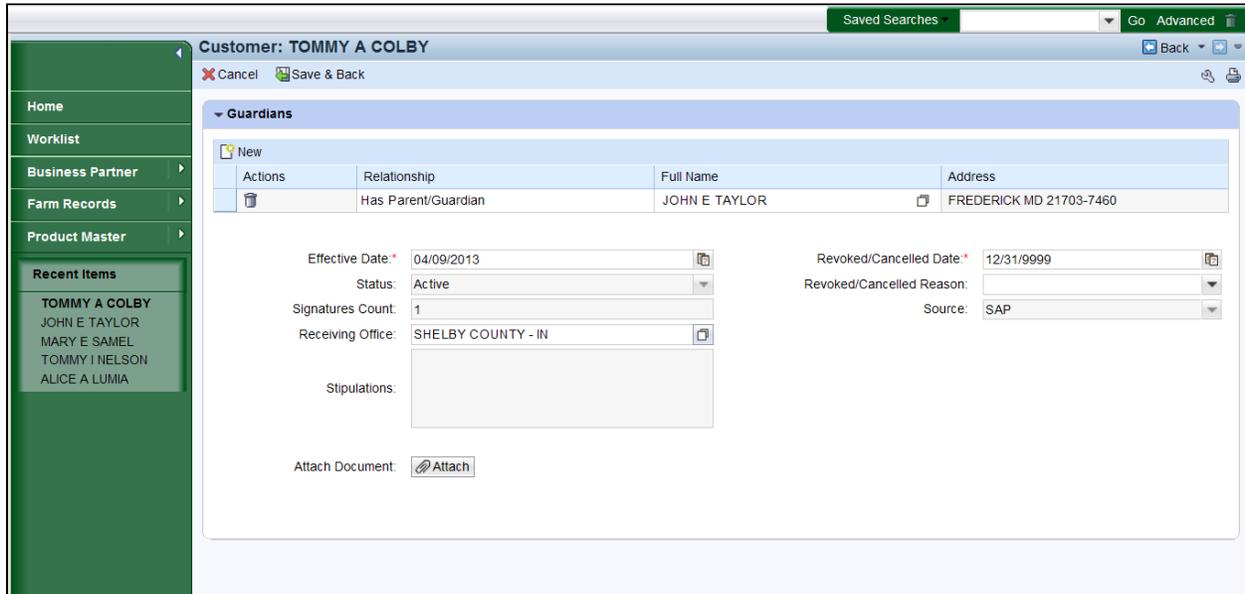
Result List: 1 Customer Found

New Customer

Inac...	BP Numb...	Common Customer Name	Tax ID...	Tax ID...	Addre...	City	State	ZIP Co...	Telep...	E-Mail
<input type="checkbox"/>	8000008...	JOHN E TAYLOR	NOTA...	No Tax...	5878...	FRED...	Maryland	21703...	+1 (80...	

17. Select the **Common Customer Name** from the Result List (JOHN E TAYLOR) [JOHN E TAYLOR](#) to go to the Customer page.

Customer: TOMMY A COLBY



Customer: TOMMY A COLBY

Cancel Save & Back

Go Advanced

Back

Guardians

New

Actions	Relationship	Full Name	Address
	Has Parent/Guardian	JOHN E TAYLOR	FREDERICK MD 21703-7460

Effective Date: 04/09/2013

Status: Active

Signatures Count: 1

Receiving Office: SHELBY COUNTY - IN

Stipulations:

Revoked/Cancelled Date: 12/31/9999

Revoked/Cancelled Reason:

Source: SAP

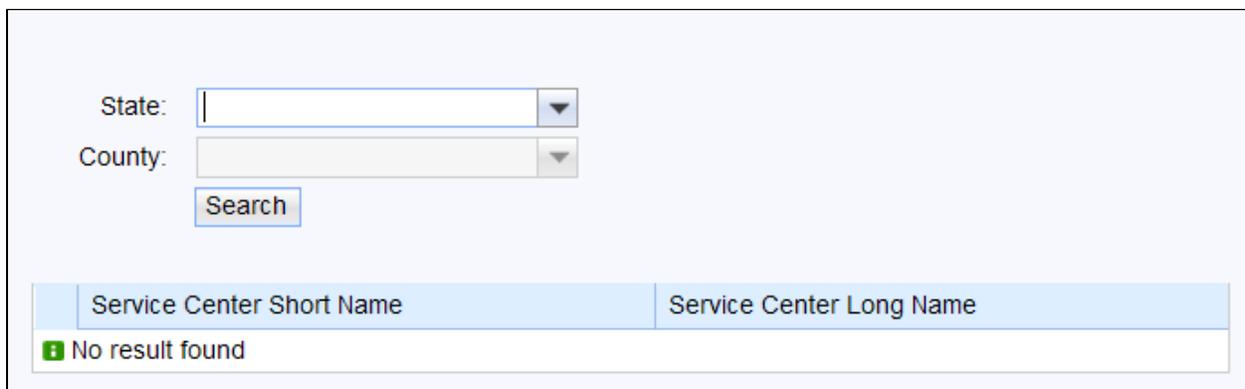
Attach Document: Attach

18. Click the **Receiving Office** field Open Input Help button  to go to the Search Criteria window.

 The system will default and populate the County Office of the user into the Receiving Office field. If the correct value is reflected, you can skip 6 steps.

 The **Effective Date** defaults to the current date but can be changed.

Service Center Search



State:

County:

Search

Service Center Short Name	Service Center Long Name
 No result found	

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

Service Center Search

State:

County:

Service Center Short Name

Service Center Long Name

No result found

20. Click the **Receiving Office State** (Maryland) **MARYLAND**.

Service Center Search

State:

County:

Service Center Short Name

Service Center Long Name

No result found

21. Click the **County** dropdown icon to display the list of County Offices.

Service Center Search

State:

County:

Service Center Short Name

Service Center Long Name

No result found

22. Click the County Office (Frederick) **FREDERICK**



Service Center Search

State:

County:

Service Center Short Name	Service Center Long Name
No result found	

23. Click the **Search** button to display the Service Center.

Service Center Search

State:

County:

Service Center Short Name	Service Center Long Name
FREDERICK COUNTY - MD	FREDERICK COUNTY FARM SERVICE AGE...

24. Click the **Box** in front of the Service Center field to populate the County Office Name in the **Receiving Office** field.



Customer: TOMMY A COLBY

Customer: TOMMY A COLBY

Cancel Save & Back

Go Advanced Back

Guardians

Actions	Relationship	Full Name	Address
	Has Parent/Guardian	JOHN E TAYLOR	FREDERICK MD 21703-7460

Effective Date: 04/18/2013
 Status: Active
 Signatures Count: 1
 Receiving Office: FREDERICK COUNTY FARM SERVICE AGENC
 Stipulations:
 Attach Document: Attach

Revoked/Cancelled Date: 12/31/9999
 Revoked/Cancelled Reason:
 Source: SAP

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

Field	R/O/C	Description
Revoked / Cancelled Date	R	Date the Representative Capacity was revoked / cancelled Example: 04/18/2015



Customer: TOMMY A COLBY

Customer: TOMMY A COLBY

Cancel Save & Back

Go Advanced

Back

1

Guardians

New

Actions	Relationship	Full Name	Address
	Has Parent/Guardian	JOHN E TAYLOR	FREDERICK MD 21703-7460

Effective Date: 04/18/2013

Status: Active

Revoked/Cancelled Date: 04/18/2015

Revoked/Cancelled Reason:

Signatures Count: 1

Receiving Office: FREDERICK COUNTY FARM SERVICE AGENC

Source: SAP

Stipulations:

Attach Document: Attach

26. Click the **Revoked/Cancelled Reason** dropdown icon .

Customer: TOMMY A COLBY

Customer: TOMMY A COLBY

Cancel Save & Back

Go Advanced

Back

1

Guardians

New

Actions	Relationship	Full Name	Address
	Has Parent/Guardian	JOHN E TAYLOR	FREDERICK MD 21703-7460

Effective Date: 04/18/2013

Status: Active

Revoked/Cancelled Date: 04/18/2015

Revoked/Cancelled Reason:

Source:

- Minor Child turns 18
- Revoked by Court Order
- Revoked by Court Order (Future Date)
- Service Center Error

Signatures Count: 1

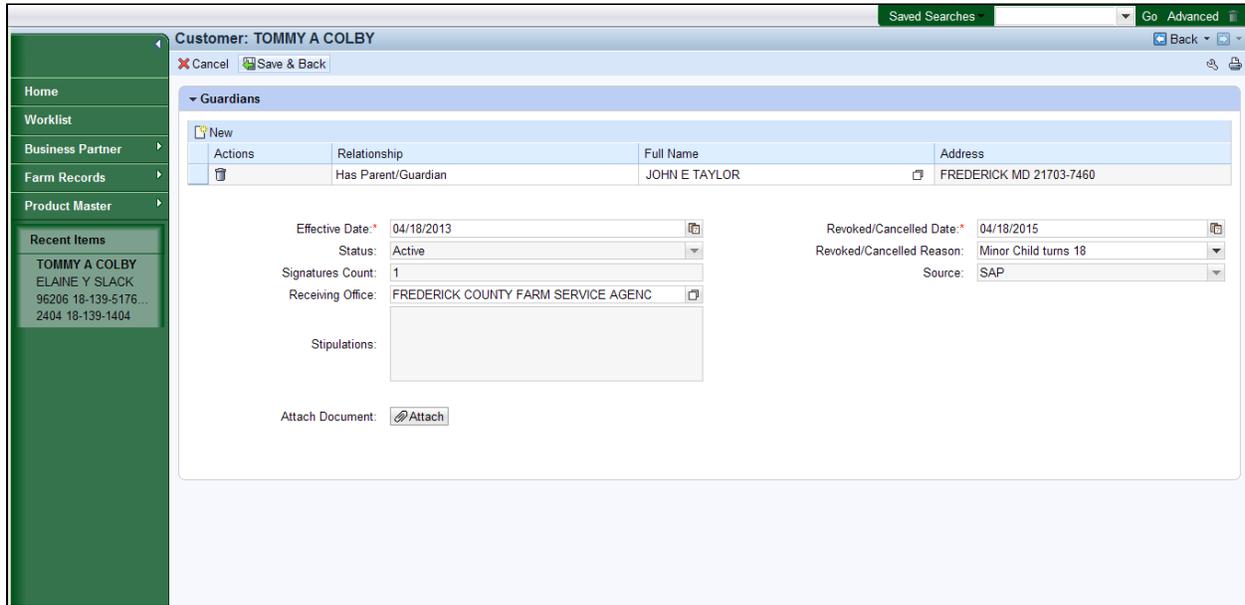
Receiving Office: FREDERICK COUNTY FARM SERVICE AGENC

Stipulations:

Attach Document: Attach

27. Click the **Minor Child turns 18** Minor Child turns 18 | .

Customer: TOMMY A COLBY



Customer: TOMMY A COLBY

Cancel Save & Back

Go Advanced Back

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

TOMMY A COLBY
ELAINE Y SLACK
96206 18-139-5176...
2404 18-139-1404

Guardians

New

Actions	Relationship	Full Name	Address
	Has Parent/Guardian	JOHN E TAYLOR	FREDERICK MD 21703-7460

Effective Date: 04/18/2013

Status: Active

Signatures Count: 1

Receiving Office: FREDERICK COUNTY FARM SERVICE AGENC

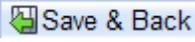
Stipulations:

Attach Document: Attach

Revoked/Cancelled Date: 04/18/2015

Revoked/Cancelled Reason: Minor Child turns 18

Source: SAP

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



Additional customers may be added to the guardianship by clicking the New button.

Submit Relationship

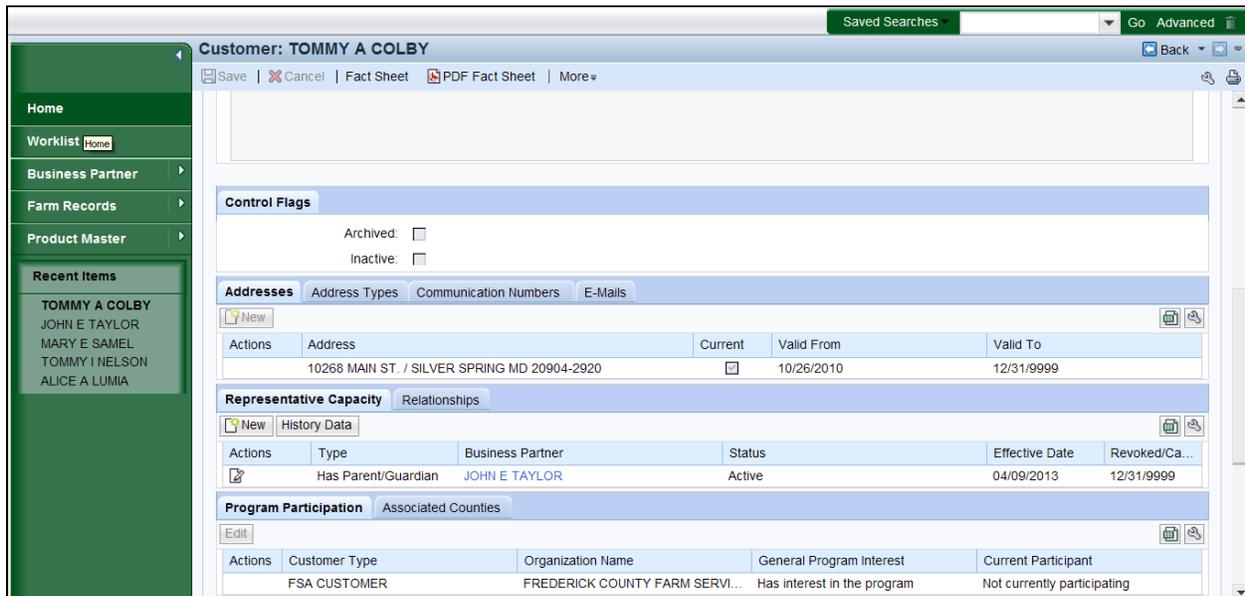
Is all the data displayed complete and accurate? Active representative capacity data cannot be modified after it is submitted. It can only be revoked. Are you sure you wish to continue?

29. Click the **Yes** button  to confirm saving the guardianship and go to the Customer page.



The Guardianship is now shown in the list of the Customer's Representative Capacities.

Customer: TOMMY A COLBY



Customer: TOMMY A COLBY

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

Control Flags

Archived:
Inactive:

Addresses | Address Types | Communication Numbers | E-Mails

New

Actions	Address	Current	Valid From	Valid To
	10268 MAIN ST. / SILVER SPRING MD 20904-2920	<input checked="" type="checkbox"/>	10/26/2010	12/31/9999

Representative Capacity | Relationships

New | History Data

Actions	Type	Business Partner	Status	Effective Date	Revoked/Ca...
	Has Parent/Guardian	JOHN E TAYLOR	Active	04/09/2013	12/31/9999

Program Participation | Associated Counties

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	FREDERICK COUNTY FARM SERVI...	Has interest in the program	Not currently participating

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

 A Guardianship Relationship has been completed.



Result

You have created a Guardianship. This Guardianship will automatically revoke on the minor's 18th birthday.



Next Steps

N/A