

#### Purpose

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

#### Trigger

Perform this procedure when requested by a customer.

#### Prerequisites

• The customer records for both spouses must be in Business Partner.

#### **Helpful Hints**

- Start from the customer record of the spouse who is granting spousal signature authority. That is, if the husband is granting signature authority to his wife, start with the husband's customer record.
- Creating a spousal signature for one spouse does not automatically create a spousal signature for the other spouse. That is if the husband grants his wife spousal signature authority it does not automatically grant him authority to sign for his wife.
- "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	(f)	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 <b>MUST</b> be completed or another trigger that should be started and is related to the



		procedure.
Acritical note	$\otimes$	Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
Contact someone	C	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 <b>reference</b> is available	$\mathbf{P}$	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

Home	Today's Appointments	Alerts
Worklist		
Calendar	No result found	No result found
Business Partner	Workflow Tasks	Q Search
Farm Records	Please Review DOD for BP 8000016382	Member Hierarchies Search Customers/Contac
Acreage/Inventory 🕨	Please Review DOD for BP 8000016382 Please Review DOD for BP 8000016256	Search Employees
Product Master	Please Review DOD for BP 8000016255	Search Farm/Bin(s) Search Products
Recent Items	Please Review DOD for BP 8000016253	Search Requested Produces Search Tract/Field(s)
NICHOLAS CHARL A JOY ARNESON	Web Links	Create
		Create Contact
2.	Business Parti	ner 🕨

Click the **Business Partner** button the Accounts page.

to go to



#### Accounts

Home	( <b>- · · · · · · · · · ·</b>	
Worklist	Search 🔳 🗙	Create
Calendar	Member Hierarchies <u>Search Customers/Contacts</u> Search Employees	Create Contact
Business Partner		
Farm Records		
Acreage/Inventory 🕨		
Product Master		
Recent Items		
NICHOLAS CHARL A JOY ARNESON		

# 3. Click the Search Customer/Contacts label <u>Search Customers/Contacts</u> to go to the Search: Customer page.

	Search Criteria				Hide Sea
st					
lar	Search for: All Accourt	nts			•
	Business Name	-	is	•	
ss Partner	First Name	-	is	•	Choose the value of this criterion
tecords	Last Name	-	is	•	Choose the value of this citerion
je/Inventory	Middle Name	-	is	•	
	Common Customer Name	-	is	-	
:t Master	BP Number/ID	-	is	•	
nt Items	Role	-	is	•	-
IOLAS CHARL IV ARNESON				Maxir	num Number of Results:
	Search Clear Reset		Save Search As:		G

### Search: Customers



4. Choose the value of this criterion Click in the First Name field to select it.

We will be searching for the spouse who is granting signature authority. In this example the husband is granting signature authority to his wife so we will be searching for the husband's customer record.

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

Field	R/O/C	Description
First Name	R	
		Example:
		Example: Nicholas

- 6.
  - Click in the Last Name field \_ to select it.

#### **Search: Customers**

	Search Criteria				Hide Sea
st					
lar	Search for: All Accourt	nts			•
	Business Name	-	is	-	
ss Partner	First Name	-	is	-	Nicholas
Records	Last Name	-	is	-	
je/Inventory 🕨	Middle Name	-	is	-	
	Common Customer Name	-	is	-	
:t Master	BP Number/ID	•	is	•	
nt Items	Role	•	is	•	-
IOLAS CHARL Y ARNESON				Ma	ximum Number of Results:
	Search Clear Reset		Save	Search As:	E.

As required, complete/review the following fields: 7.

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

#### Search: Customers

	Search Criteria					Hide Sea
st						
lar	Search for: All Acc	ounts			•	
	Business Name	-	is	-		
ss Partner	First Name	•	is	•	Nicholas	
tecords	Last Name	•	is	•	Charles	
je/Inventory 🕨	Middle Name	•	is	•		
	Common Customer Name	-	is	-		
:t Master	BP Number/ID	•	is	•		
nt Items	Role	•	is	•		-
IOLAS CHARL IY ARNESON				Ma	aximum Number o	of Results:
	Search Clear Reset		Save	Search As:		Ľ

8. Click the Search button Search to display the search results for the criteria used.



#### **Search: Customers**

	Middle Name		is	-		
st	Common Customer	Name 🔻	is	•		
	BP Number/ID	-	is	•		
lar	Role	-	is	•		-
ess Partner	Search Clear Res	set	Save Search As:		mum Number of F	Results:
t Master	Result List					
1t Items	Sew Customer					ы
	铅 BP Number/ID	Common Name	Street/House Numb	ber	City	State
IOLAS CHARL Y ARNESON	8000002228 ◀	NICHOLAS NICHOLAS	5678 MARTINI CO	URT	FREDERICK	Maryla

9. Select the Common Customer Name from the Result List (Nicholas

Charles) **NICHOLAS** to go to the Customer: XXXX page.

# Customer: XXXX

10	ave   🔏 Cancer		eo ao	cres   More∓		Ø 74	\$ <i>G</i>
	Customer Detail	s Customer Profile Ro	oles	Identification N	umbers		
	🖉 Edit						
	General Data			Main Address	and Con	nmunication I	Data
	Current Role:	Individual		Information.			
	BP Number /	80000		Street/Hous.	5678 N	IARTINI C	
	Prefix:			PO Box:			
	First Name:	NICHOLAS		City:	FREDE	RICK	
	Middle Name:			State:	MD	Maryland	
	Last Name:	CHARLES		ZIP Code:	21701		
	Suffix:			Country:	US	USA	
	Last Name a			Telephone N			
	Legal Name:	Y		E-Mail Addr	NickCh	arlesPI@gmai	l.com



#### 10. Scroll down to the Representative Capacity tab.

#### **Customer: XXXX (Representative Capacity)**

	Customer: NICHOLAS CHARLES	🖸 Back 👻 🗔 📼
	I Save │ 💥 Cancel │ 🛯 New ││ 🖺 Determined acres │ More <del>-</del>	õ 🎭 🖉 🖨 📀
	Control Flags	
	Archive:  Inactive:	
	Addresses Address Types Address Independent Communication Numbers	
	PNew History Data	<b>1</b>
	A Address Telephone/Ext. Mobile E-Mai	I
	5678 MARTINI COUR	
	Representative Capacity Relationships Member Signatures	
	Rew History Data	
	No result found	
	Program Participation Associated Counties FLP Customer	
	Edit	
11.	[ <sup>™</sup> New	

Click the New button For the Representative Capcity tab to go to the Customer: XXXX (Fiduciary Relationships) page.



#### **Customer: XXXX (Fiduciary Relationhips)**

Customer: NICHOLAS CHAR	LES029	
- Representative Capacity Relati	ionships	
_ Relationship Category:	<b>.</b>	
	Has Conservator Has FSA Attorney in Fact Has Parent/Guardian Has Non-FSA Attorney in Fact Has Signature Authority Has Spousal Signature Authority	

- 12. Click the **Relationship** dropdown list icon 🔽 to display a list of Relationships.
- **13.** Select Has Spousal Signature Has Spousal Signature from the dropdown list for Relationship.

### **Customer: XXXX (Spousal Signature)**

Custom	ner: NICHOLAS CHARL	LES029		C	Back 👻 💟 👻
🖋 Back	Save & Back				ی چې 😂
- Spor	usal Signature				
	Spousal ID:*	0	Revoked/Cancelled Date:*	12-31-9999	6
	Effective Date:*	6	Revoked Reason:		-
	Signature Authority:*	<b>~</b>			
	Receiving Office:	Ø			
	Status:	Active 👻			
	Attach Document:	@Attach			

14. Click the Spousal ID field Open Input Help icon<sup>12</sup> to go to the Search Criteria window.



Search for: All Accou	nts			•	
Business Name	-	is	-		0 0
First Name	-	is	•	Choose the value of this criterion	0 0
Last Name	-	is	•	choose the value of this triterion	0 0
Middle Name	-	is	•		0 0
Common Customer Name	-	is	-		00
BP Number/ID	-	is	-		00
Role	-	is	-	•	00
City	-	is	-		00
Search Clear Reset			Max	ximum Number of Result	s: 100

15.

Click in the First Name field Choose the value of this criterion to select it.

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

Field	R/O/C	Description
First name	R	
		Example:
		Nora

17. Click in the Last Name field to select it.



Search Criter	ia								Hic	le Sea	arch F	ield
Search	for:	All Accounts	•				•					
Business Nan	ne		•	is		•				0 0	•	
First Name			•	is		•	Nora			0 0	>	
Last Name			•	is		•				0 0	>	
Middle Name			•	is		•				0 0	>	
Common Cus	tomer	Name	•	is		•				0 0	•	
BP Number/II	D		•	is		•				0 0	•	
Role			•	is		•			•	0 0	•	
City			-	is		•				0 0	>	
Search Clea	ar Re	eset				Ma	aximum Nun	nber of Resu	ults:	100		
Sew Custo	omer										Ы	Ľ

**18.** As required, complete/review the following fields:

Field	R/O/C	Description
	R	
		Example: Charles



Search for: All Accou	ints			•		
Business Name	-	is	•			0 0
First Name	-	is	-	Nora		0 0
ast Name	-	is	-	Charles		0 0
/liddle Name	-	is	-			0 0
Common Customer Name	•	is	-			0 0
3P Number/ID	-	is	-			0 0
Role	-	is	-		•	0 0
Dity	-	is	-			0 0
Search Clear Reset			Μ	aximum Number of Re	sults:	100

**19.** Click the **Search** button **Search** to list the Customers meeting the search criteria.



Search Criteria						Hide S	earch Field			
Search for: All Ac	counts			-						
Business Name	💌 is		•			0	•			
First Name	🔻 is		-	Nora		0	•			
Last Name	💌 is		-	Charles		0	•			
Middle Name	💌 is		-			0	•			
Common Customer Nam	e 🔻 is		•			0	•			
BP Number/ID	💌 is		-			0	•			
Role	💌 is		-		•	• 0	•			
City	▼ is		-			0	•			
Maximum Number of Results: 100 Search Clear Reset Result List										
Sew Customer							II &			
I BP N Com	nmon Custo	Street/	City	State	ZIP C	Telep	. E-Mail			
8000 NOF	A CHARLES	5678	FDFD	Mandana	21701					
	a contraction of the second seco	0070	FRED	Maryland	21/01		Nora			

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



#### **Customer: XXXX (Spousal Signature)**

Customer: NICHOLAS CHAR	LES029			🖸 Back	• 🖸 •
✓ Back Save & Back				<b>Q</b> (2) 🛸	ه 🖨
✓ Spousal Signature					
Spousal ID: Effective Date:* Signature Authority:* Receiving Office: Status:	NORA CHARLES 11-20-2012  Active	Revoked/Cancelled Date:* Revoked Reason:	12-31-9999		I <sup>™</sup>
Attach Document:	@Attach				

**21.** Click the **Signature Authority** dropdown list icon **I** to display the options.

# Customer: XXXX (Spousal Signature)

Customer: NICHOLAS CHAR	LES029			🖸 Ba	ck 👻 🖸 👻
✓ Back				<b>0</b> (2) 1	ی کی 😂
- Spousal Signature					
Spousal ID: Effective Date:* Signature Authority:* Receiving Office: Status:	NORA CHARLES 11-20-2012   Yes	Revoked/Cancelled Date:* Revoked Reason:	12-31-9999		•
Attach Document:	No ØAttach				

**22.** Select Yes from the Signature Authority dropdown.



#### **Customer: XXXX (Spousal Signature)**

Custom	ner: NICHOLAS CHARI	_E\$029				🖸 Back 👻 💽 👻
🖋 Back	Save & Back					sk & 🖨
- Spor	usal Signature					
	Spousal ID:	NORA CHARLES		Revoked/Cancelled Date:*	12-31-9999	<b>F</b> 2
	Effective Date:*	11-20-2012	6	Revoked Reason:		•
	Signature Authority:*	Yes	-			
	Receiving Office:		ð			
	Status:	Active	Ψ.			
	Attach Document:	@Attach				

**23.** Click the **Receiving Office** field Open Input Help icon 🗖 to go to the Search Criteria window.

#### Service Center Search

	State:			-
	County:			•
		Search		
	Service	Center	Name	
8	No result	found		

**24.** Click the State dropdown list icon  $\frown$  to display the list of states



#### **Service Center Search**

	State:		•	-
	County:		-	•
		Alabama		
		Alaska		
		Arizona		
	Service (	Arkansas		
8	No result f	California		
		Colorado		r

25. Scroll down to the Receiving Office State.

#### **Service Center Search**

	State:		•
	County:	Kentucky	
		Louisiana	
		Maine	
		Maryland	
	Service (	Massachusetts	
B	No result fo	Michigan Minnesota	
	NO ICOULT	Minnesota	-

26.

Select the Receiving Office State (Maryland) Maryland

#### **Service Center Search**

County: Search Service Center Name	State:	Maryland		-		
Service Center Name	oounty.	Search		-		
		Center	Name			

#### 27.

Click the **County** dropdown list icon **I** to display the list of County



Offices.

**28.** Scroll down to the County Office.

#### **Service Center Search**

State:	Maryland	•		
County:		•		
	Carroll			
	Cecil			
Service	Charles			
No result	Dorchester			
INO result		•		

- **29.** Select the County Office (Frederick) Frederick
- **30.** Click the **Search** button **Search** to display the County Office Service Center number.

#### Service Center Search

State:	Maryland	<b>•</b>
County:	Frederick	•
	Search	
Service Center 62641		Name
		FREDRICK COUNTY, MD
62641		

31.

Select the Service Center (Frederick County, MD) 62641 to populate the County Office Name in the **Receiving Office** field.

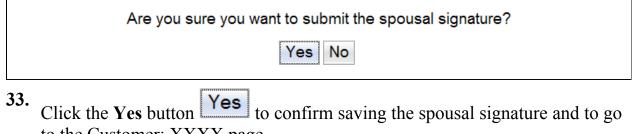


#### **Customer: XXXX (Spousal Signature)**

Customer: NICHOLAS CHAR	LES029				🖸 Back 👻 💟 👻
✓ Back Save & Back					🍫 A 🖨
Spousal ID:	NORA CHARLES		Revoked/Cancelled Date:*	12-31-9999	6
Effective Date:*	11-20-2012		Revoked Reason:		•
Signature Authority:*	Yes	•			
Receiving Office:	62641	٥			
Status:	Active	Ŧ			
Attach Document:	@Attach				

32. Click the Save & Back button to display the Save Confirmation window.

#### Submit Spousal Signature



to the Customer: XXXX page.



	_										
Archiv			Control Flags								
Archive:											
Inactive:											
Addresses Address Types Address Independent Communication Numbers											
New Histo	ry Data								<b>1</b>	>	
A Address	;		Telephone/E	Ext.	Mobile		E-Ma	il			
🎽 5678 M/	ARTINI CO	OUR									
epresentativ	ve Capaci	ty Re	lationships N	lember	Signatures						
New Histo	ry Data								<b>1</b>	>	
cti Relat	ions A	Authorize	ed Signatory	Statu	s		Effect	i F	Rev		
🎖 Has S	Spou 🛉		HARLES F				08.10.	3	31.1		
rogram Part	icipation	Assoc	iated Counties	FLP	Customer						
	ddresses New Histo Address 5678 MA epresentativ New Histo acti Relat Has S	ddresses       Address         New       History Data         Methods       Address         5678       MARTINI Construction         epresentative Capacit       New         New       History Data         Acti       Relations         Has Spou       March	ddresses       Address Types         New       History Data         Address       5678 MARTINI COUR         epresentative Capacity       Re         New       History Data         Acti       Relations         Authorize       Has Spou	ddresses       Address Types       Address Indep         New       History Data          Address       Telephone/E         5678       MARTINI COUR         epresentative Capacity       Relationships       M         New       History Data          Relationships       M         New       History Data          Relations       Authorized Signatory         Has Spou       NORA CHARLES F	ddresses       Address Types       Address Independent         New       History Data          Address       Telephone/Ext.         5678       MARTINI COUR         epresentative Capacity       Relationships       Member         New       History Data         acti       Relations       Authorized Signatory       Statu         Has Spou       NORA CHARLES F	ddresses       Address Types       Address Independent Communication         New       History Data          Address       Telephone/Ext.       Mobile         5678       MARTINI COUR         epresentative Capacity         Relationships       Member Signatures         New       History Data         acti       Relations       Authorized Signatory         Status       Has Spou       NORA CHARLES F	ddresses       Address Types       Address Independent Communication Num         New       History Data          Address       Telephone/Ext.       Mobile         5678       MARTINI COUR         epresentative Capacity         Relationships       Member Signatures         New       History Data         acti       Relations       Authorized Signatory         Status       Has Spou       NORA CHARLES F	ddresses       Address Types       Address Independent Communication Numbers         New       History Data       Telephone/Ext.       Mobile       E-Ma         3       5678 MARTINI COUR       5678 MARTINI COUR       E         epresentative Capacity       Relationships       Member Signatures       Effection         New       History Data       Effection       Effection         Acti       Relations       Authorized Signatory       Status       Effection         Has Spou       NORA CHARLES F       08.10.       08.10.	ddresses       Address Types       Address Independent Communication Numbers         New       History Data          Address       Telephone/Ext.       Mobile       E-Mail         5678       MARTINI COUR         epresentative Capacity       Relationships       Member Signatures         New       History Data         Acti       Relations       Authorized Signatory       Status       Effecti       F         Has Spou       NORA CHARLES F       08.10       3	ddresses       Address Types       Address Independent Communication Numbers       Image: Communication Numbers         New       History Data       Image: Communication Numbers       Image: Communication Numbers         Address       Telephone/Ext.       Mobile       E-Mail         5678       MARTINI COUR       Image: Communication Numbers       Image: Communication Numbers         epresentative Capacity       Relationships       Member Signatures       Image: Communication Numbers         New       History Data       Image: Communication Numbers       Image: Communication Numbers       Image: Communication Numbers         New       History Data       Image: Communication Numbers       Image: Communication Numbers       Image: Communication Numbers         New       History Data       Image: Communication Number Signatures       Image: Communication Number Signatures       Image: Communication Number Signatures         New       History Data       Image: Communication Number Signatory       Status       Effecti       Rev         Mas Spou       NORA CHARLES F       08.10       31.1	

#### Customer: XXXX (Representative Capacity)

**34.** Click the Authorized Signatory (Nora Charles)

NORA CHARLES F ...

to go to her Customer page.

#### Customer: XXXX (Representative Capacity)

Home	Control Flags	
Worklist	Archive:	
Calendar	Inactive:	
Business Partner	Addresses Address Types Address Independent Communication Nu	mł
Farm Records	SNew History Data	
	A Address Telephone/Ext. Mobile	
Acreage/Inventory	5678 MARTINI COUR	
Product Master	Representative Capacity Relationships Member Signatures	
Recent Items	New History Data	
	Acti Relations Authorized Signatory Status	E
NICHOLAS CHARL A JOY ARNESON	Is Spous NICHOLAS CHARLE	0
	Program Participation Associated Counties FLP Customer	



#### 35.

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



On the wife's, Nora's, customer record we see her listed as being spousal signator for her husband Nicholas but he is not shown as having spousal signature for her. To grant him spousal signature we would need to repeat the same process starting with the wife's customer record.



# Result

You have created a spousal signature.



# **Next Steps**

If you wish to create a spousal signature of the other spouse, you must start with the other spouse's customer record and follow the same process.