

#### Purpose

The purpose of this work instruction is to show how to perform Death Master File Verification.

### Trigger

Perform this procedure when you receive a Worklist notification requesting you to review a Date of Death (DOD) for a Customer.

### Prerequisites

- The customer record must be in Business Partner.
- Processing of the Death Master File with the Social Security Administration has identified a customer as having died and Date of Death has been extended in their Customer Record.
- You have received a Workflow Task to review a Date of Death for a customer.

### **Helpful Hints**

- For best results, carefully review ALL notes before taking action.
- "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	<b>f</b>	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.
A critical note	$\bigotimes$	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		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 Worklist Business Partner Farm Records Please Review DOD for BP DALE A Bease Review DOD for BP DALWIN O HELTON Please Review DOD for BP DALE A Bease Review DOD for BP DALE A Bease Review DOD for BP DE YOUND Please Review DOD for BP DE CARLO BURHALTER Please Review DOD for BP CLAIRELANE E KRUEGER B Depand Web Links Web Links No result found My Favorites Web Links No result found My Favorites My Favorites No result found No result Request No result Re			Saved Searches	🔽 Go_Advanced 📋
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<sup>2.</sup> Click on the **Worklist** button Worklist to review Workflow Tasks.

Workflow Tasks can also be reviewed and processed from the **Workflow Task** assignment block on the CRM Homepage.



#### Worklist

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3. Click the **Workflow Task** Please Review DOD for BP DARWIN O HELTON link Please Review DOD for BP DARWIN O HELTON to go to the Home Workflow Task page.



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4. Click the **Business Partner** link 800000097-DARWIN O HELTON label 800000097-DARWIN O HELTON to view the Business Partner record.



The Description includes producer information and details for completing the task.

You can access and view the Business Partner record by selecting the link in Associated Business Objects.



## **Customer: DARWIN O HELTON**



5. Click the **Back** button Back to return to the workflow task.



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6. Click the Add Note Add Note button.

Include a note or attachment in the Attachment assignment block to document important information or updates to the task. (e.g., "Left a message" or "Family will deliver death certificate").



### Note - Workflow Task

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

Field	R/O/C	Description
Description:	R	A title that depicts or gives an account of the text attached
		<b>Example:</b> Death Certificate
Text	R	
		<b>Example:</b> Family will deliver today

8. Click the Save button Save.



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9. Click the **Decision** dropdown icon **•**.



Before you select a **Decision** option, you must verify the death of the Customer.



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**10.** Click the **Decision** option **Accept** Accept if you have verified the Customer is deceased.



Select **Decline** if you have confirmed that the Customer is not deceased.



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11. Click the **Execute Decision** button Execute Decision to complete the verification of the Customer's death.



#### Worklist

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**12.** Click the **Expand Notifications** button **1**(1) to review system message.



#### Worklist

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- **13.** Click **Collapse Notifications** button **X**.
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Review the system message confirming that the decision was executed and the work item was completed.

The **Deceased Flag** has now been set in the Customer's Business Partner record and all Representative Capacity Relationships involving the customer have been terminated.



# Result

You have verified the death of a Customer.



**Next Steps**