



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 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



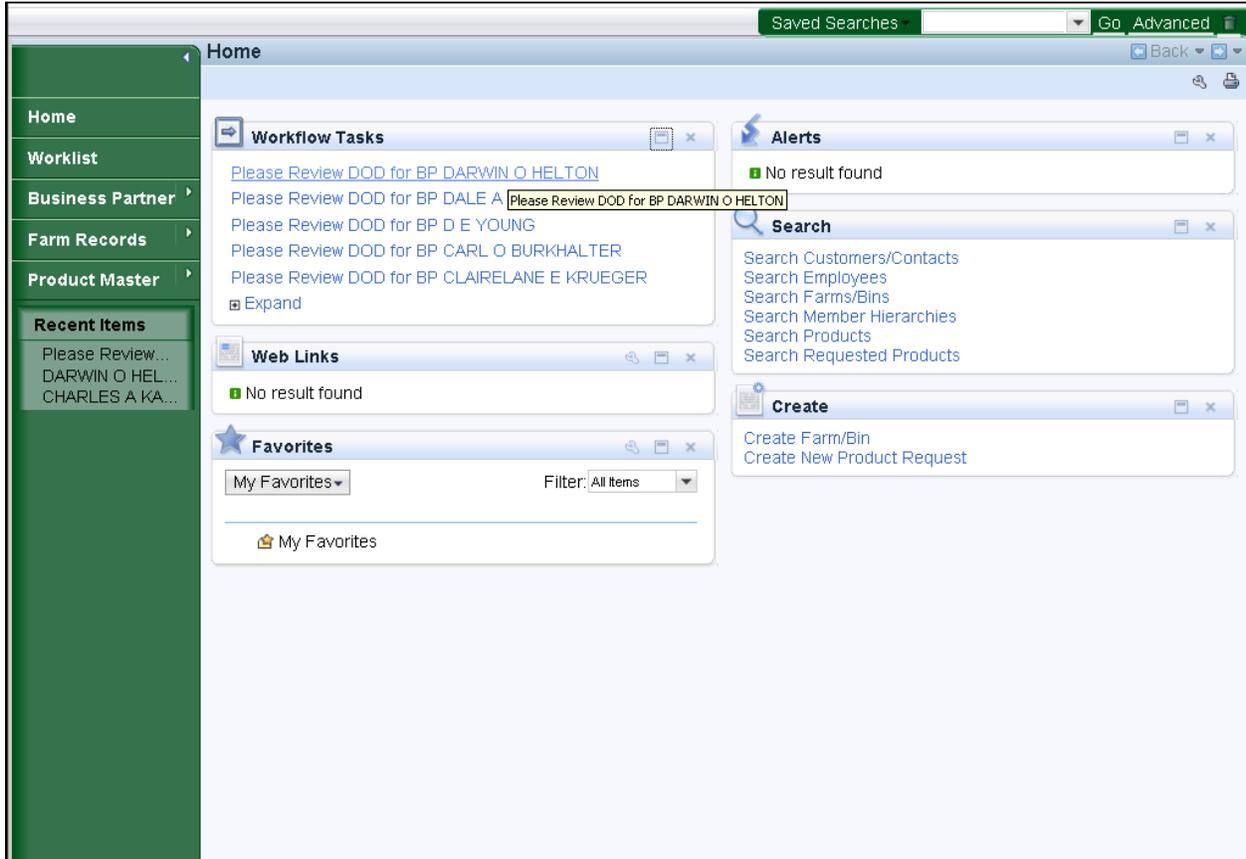
		should be started and is related to the procedure.
A critical note		Use this note to specify something that MUST NOT be done during the procedure.
Contact someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A 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 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

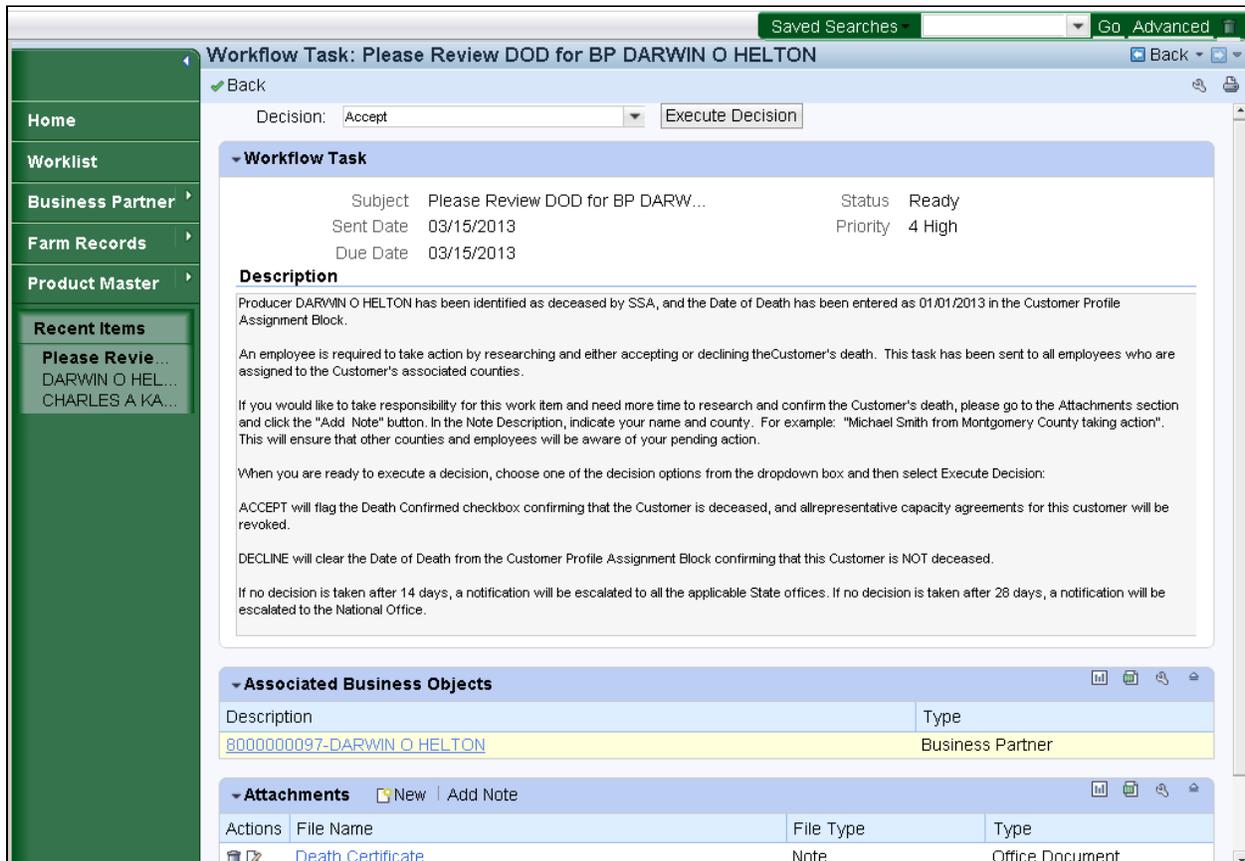
Worklist interface showing a list of workflow tasks. The interface includes a sidebar with navigation options (Home, Worklist, Business Partner, Farm Records, Product Master, Recent Items) and a main content area with tabs for Alerts and Workflow Tasks. The Workflow Tasks tab is active, displaying a table of tasks.

Due	Subject	Sent...	Due...	Priority	Associated...	Proc...	Sub Pr...
	Please Review DOD for BP BRENT O MUELLER	03/...	03/...	4 High	800000002...	Bus...	Date o...
	Please Review DOD for BP BRENDA I HILL	03/...	03/...	4 High	800000042...	Bus...	Date o...
	Please Review DOD for BP CARL O BURKHALTER	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BRETT T MEYER	03/...	03/...	4 High	800000003...	Bus...	Date o...
	Please Review DOD for BP BRUCE A BLUM	03/...	03/...	4 High	800000018...	Bus...	Date o...
	Please Review DOD for BP DARWIN O HELTON	03/...	03/...	4 High	800000009...	Bus...	Date o...
	Please Review DOD for BP DALE A THULINE	03/...	03/...	4 High	800000001...	Bus...	Date o...
	Please Review DOD for BP D E YOUNG	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BEVERLY O PUSCH	03/...	03/...	4 High	800000014...	Bus...	Date o...
	Please Review DOD for BP DAN E LIESENER	03/...	03/...	4 High	800000009...	Bus...	Date o...

Navigation: Expand | ◀ Back 1 2 Forward ▶

- Click the **Workflow Task** [Please Review DOD for BP DARWIN O HELTON](#) link to go to the Home Workflow Task page.

Workflow Task: Please Review DOD for BP DARWIN O HELTON



The screenshot shows a web application interface for a workflow task. The title bar reads "Workflow Task: Please Review DOD for BP DARWIN O HELTON". On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The "Recent Items" section lists "Please Review DOD for BP DARWIN O HELTON" and "CHARLES A. KA...".

The main content area includes a "Decision" dropdown set to "Accept" and an "Execute Decision" button. Below this is a "Workflow Task" section with the following details:

Subject	Please Review DOD for BP DARW...	Status	Ready
Sent Date	03/15/2013	Priority	4 High
Due Date	03/15/2013		

The "Description" section contains the following text:

Producer DARWIN O HELTON has been identified as deceased by SSA, and the Date of Death has been entered as 01/01/2013 in the Customer Profile Assignment Block.

An employee is required to take action by researching and either accepting or declining the Customer's death. This task has been sent to all employees who are assigned to the Customer's associated counties.

If you would like to take responsibility for this work item and need more time to research and confirm the Customer's death, please go to the Attachments section and click the "Add Note" button. In the Note Description, indicate your name and county. For example: "Michael Smith from Montgomery County taking action". This will ensure that other counties and employees will be aware of your pending action.

When you are ready to execute a decision, choose one of the decision options from the dropdown box and then select Execute Decision:

ACCEPT will flag the Death Confirmed checkbox confirming that the Customer is deceased, and all representative capacity agreements for this customer will be revoked.

DECLINE will clear the Date of Death from the Customer Profile Assignment Block confirming that this Customer is NOT deceased.

If no decision is taken after 14 days, a notification will be escalated to all the applicable State offices. If no decision is taken after 28 days, a notification will be escalated to the National Office.

Below the description is the "Associated Business Objects" section, which contains a table:

Description	Type
8000000097-DARWIN O HELTON	Business Partner

The "Attachments" section is currently empty, with options for "New" and "Add Note".

- Click the **Business Partner** link [8000000097-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

Customer: DARWIN O HELTON

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

Customer Details | Customer Profile | Roles | Identification Numbers

Edit

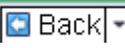
General Data	Main Address and Communication Data
Current Role: Individual	Information Line:
BP Number / ID: 8000000097	Address Line: 1562 Main St.
Prefix:	PO Box:
First Name: DARWIN	City: CARTHAGE
Middle Name: O	State: IN Indiana
Last Name: HELTON	ZIP Code: 46115-9454
Suffix:	Country: US USA
Last Name at Birth:	Telephone Number: 800-000-0000
Legal Name: No	E-Mail Address: test@training.com
Common Customer...: DARWIN O HELTON	Communication Me...: E-Mail
Language Prefere...: English	
Data Origin: SCIMS	
Employee Type: Not an employee	
Tax ID Type: Social Security Number	
Tax ID Number: 888990016	

Notes

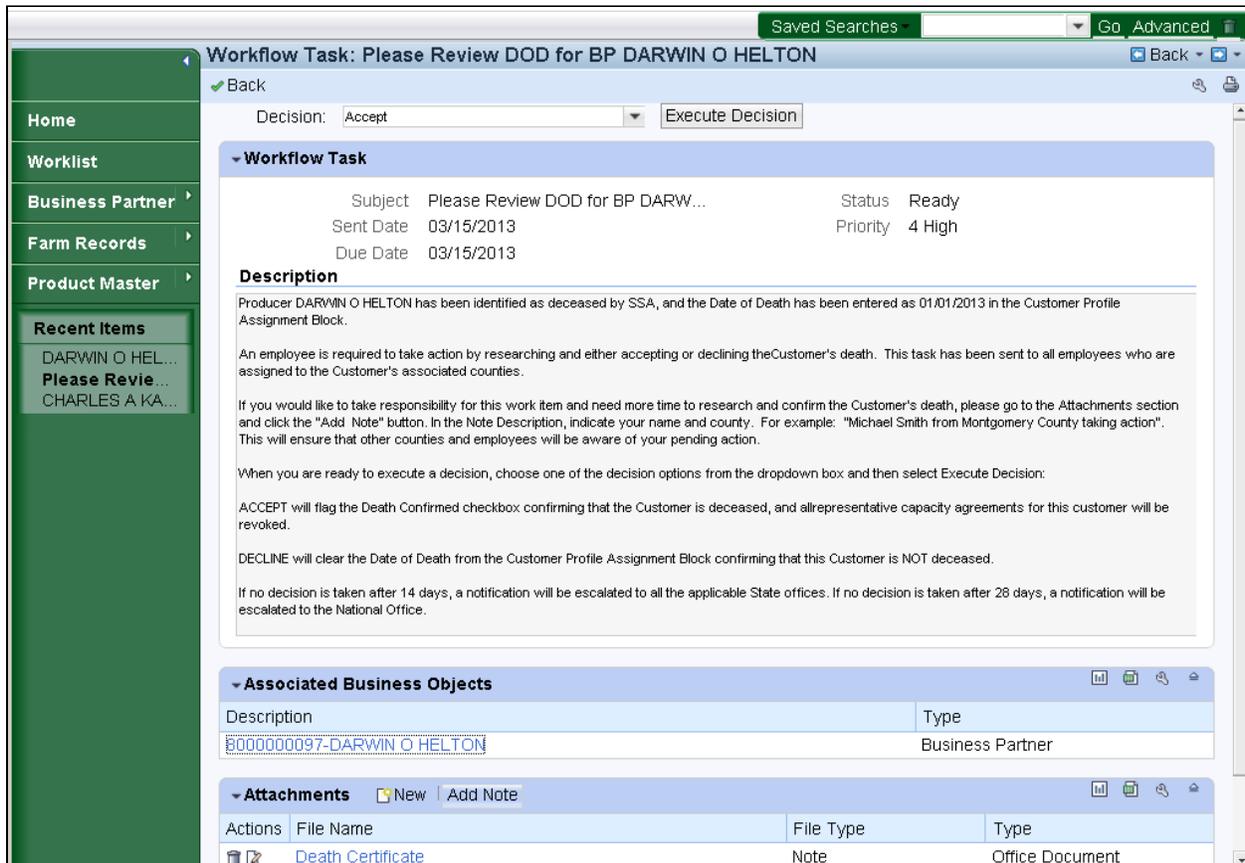
Control Flags

Archived:

Inactive:

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

Workflow Task: Please Review DOD for BP DARWIN O HELTON



The screenshot shows a web application interface for a workflow task. The title bar reads "Workflow Task: Please Review DOD for BP DARWIN O HELTON". On the left is a green sidebar with navigation options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area includes a "Decision" dropdown set to "Accept" and an "Execute Decision" button. Below this is a "Workflow Task" section with a table showing task details:

Subject	Please Review DOD for BP DARW...	Status	Ready
Sent Date	03/15/2013	Priority	4 High
Due Date	03/15/2013		

The "Description" section contains the following text:

Producer DARWIN O HELTON has been identified as deceased by SSA, and the Date of Death has been entered as 01/01/2013 in the Customer Profile Assignment Block.

An employee is required to take action by researching and either accepting or declining the Customer's death. This task has been sent to all employees who are assigned to the Customer's associated counties.

If you would like to take responsibility for this work item and need more time to research and confirm the Customer's death, please go to the Attachments section and click the "Add Note" button. In the Note Description, indicate your name and county. For example: "Michael Smith from Montgomery County taking action". This will ensure that other counties and employees will be aware of your pending action.

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If no decision is taken after 14 days, a notification will be escalated to all the applicable State offices. If no decision is taken after 28 days, a notification will be escalated to the National Office.

Below the description is the "Associated Business Objects" section, which contains a table:

Description	Type
8000000097-DARWIN O HELTON	Business Partner

The "Attachments" section has a "New" button and an "Add Note" button. It contains a table with the following data:

Actions	File Name	File Type	Type
	Death Certificate	Note	Office Document

6. Click the **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

Description:

Text

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 Example: Death Certificate
Text	R	Example: Family will deliver today

8. Click the **Save** button .



Workflow Task: Please Review DOD for BP DARWIN O HELTON

The screenshot shows a web application interface for a workflow task. On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area is titled 'Workflow Task: Please Review DOD for BP DARWIN O HELTON'. At the top right of this area is a 'Saved Searches' dropdown and a 'Go Advanced' button. Below the title is a 'Back' button and a 'Decision' dropdown menu currently set to 'Accept', with an 'Execute Decision' button next to it. The task details section shows: Subject: Please Review DOD for BP DARW..., Status: Ready, Sent Date: 03/15/2013, Priority: 4 High, and Due Date: 03/15/2013. The description section contains detailed instructions for the user, including a note about the customer's death and the required actions for 'ACCEPT' and 'DECLINE' decisions. Below the description is the 'Associated Business Objects' section, which shows a table with one entry: Description: 8000000097-DARWIN O HELTON, Type: Business Partner. At the bottom is the 'Attachments' section, which includes a 'New' button, an 'Add Note' button, and a table with one entry: Actions: [trash icon], File Name: Death Certificate, File Type: Note, Type: Office Document.

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



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



Workflow Task: Please Review DOD for BP DARWIN O HELTON

Workflow Task: Please Review DOD for BP DARWIN O HELTON

Decision:

Subject: Please Review DOD for BP DARW... Status: Ready
 Sent Date: 03/15/2013 Priority: 4 High
 Due Date: 03/15/2013

Description

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If no decision is taken after 14 days, a notification will be escalated to all the applicable State offices. If no decision is taken after 28 days, a notification will be escalated to the National Office.

Associated Business Objects

Description	Type
8000000097-DARWIN O HELTON	Business Partner

Attachments

Actions	File Name	File Type	Type
	Death Certificate	Note	Office Document

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

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



Workflow Task: Please Review DOD for BP DARWIN O HELTON

Workflow Task: Please Review DOD for BP DARWIN O HELTON

Decision:

Workflow Task

Subject	Please Review DOD for BP DARW...	Status	Ready
Sent Date	03/15/2013	Priority	4 High
Due Date	03/15/2013		

Description

Producer DARWIN O HELTON has been identified as deceased by SSA, and the Date of Death has been entered as 01/01/2013 in the Customer Profile Assignment Block.

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Associated Business Objects

Description	Type
8000000097-DARWIN O HELTON	Business Partner

Attachments

Actions	File Name	File Type	Type
	Death Certificate	Note	Office Document

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



Worklist

Worklist

Alerts | Personalize Alerts

No result found

Workflow Tasks | Personalize Workflow Tasks

Due	Subject	Sent...	Due...	Priority	Associated...	Proc...	Sub Pr...
	Please Review DOD for BP BRENT O MUELLER	03/...	03/...	4 High	800000002...	Bus...	Date o...
	Please Review DOD for BP BRENDA I HILL	03/...	03/...	4 High	800000042...	Bus...	Date o...
	Please Review DOD for BP CARL O BURKHALTER	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BRETT T MEYER	03/...	03/...	4 High	800000003...	Bus...	Date o...
	Please Review DOD for BP BRUCE A BLUM	03/...	03/...	4 High	800000018...	Bus...	Date o...
	Please Review DOD for BP DALE A THULINE	03/...	03/...	4 High	800000001...	Bus...	Date o...
	Please Review DOD for BP D E YOUNG	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BEVERLY O PUSCH	03/...	03/...	4 High	800000014...	Bus...	Date o...
	Please Review DOD for BP DAN E LIESENER	03/...	03/...	4 High	800000009...	Bus...	Date o...
	Please Review DOD for BP DAVID A EASON	03/...	03/...	4 High	800000001...	Bus...	Date o...

Expand ◀ Back 1 2 Forward ▶

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



Worklist

The screenshot shows the 'Worklist' application interface. On the left is a navigation menu with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items (listing DARWIN O HEL... and CHARLES A KA...). The main area is titled 'Worklist' and contains two sections: 'Alerts' (showing 'No result found') and 'Workflow Tasks' (showing a table of tasks). A yellow system message at the top right states: 'Decision successfully executed and work item completed'. Below the table is a pagination control: 'Expand', 'Back 1 2 Forward'.

Due	Subject	Sent...	Due...	Priority	Associated...	Proc...	Sub Pr...
	Please Review DOD for BP BRENT O MUELLER	03/...	03/...	4 High	800000002...	Bus...	Date o ...
	Please Review DOD for BP BRENDA I HILL	03/...	03/...	4 High	800000042...	Bus...	Date o ...
	Please Review DOD for BP CARL O BURKHALTER	03/...	03/...	4 High	800000006...	Bus...	Date o ...
	Please Review DOD for BP BRETT T MEYER	03/...	03/...	4 High	800000003...	Bus...	Date o ...
	Please Review DOD for BP BRUCE A BLUM	03/...	03/...	4 High	800000018...	Bus...	Date o ...
	Please Review DOD for BP DALE A THULINE	03/...	03/...	4 High	800000001...	Bus...	Date o ...
	Please Review DOD for BP D E YOUNG	03/...	03/...	4 High	800000006...	Bus...	Date o ...
	Please Review DOD for BP BEVERLY O PUSCH	03/...	03/...	4 High	800000014...	Bus...	Date o ...
	Please Review DOD for BP DAN E LIESENER	03/...	03/...	4 High	800000009...	Bus...	Date o ...
	Please Review DOD for BP DAVID A EASON	03/...	03/...	4 High	800000001...	Bus...	Date o ...

13. Click **Collapse Notifications** button .

 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