



Purpose

Perform this procedure when requesting a change to a restricted fields (Inactive Indicator, Tax Type, Tax Number, FSA and FLP Program Participation and Associated Counties) in the BP record that requires State Security Officer (SSO)/State Specialist approval.

The KFC request is used to make a change to a restricted field. When the user creates a KFC for TIN Type change, upon 'Submit', ALL roles (current and prior) on the BP record are locked until the workflow is either Accepted or Rejected by the SSO/State Specialist.






If a change to a TIN Type and Role is needed concurrently, the user must contact the State Security Officer to make the edits. A KFC is not used in this situation.

Prerequisites

- Business Partner Customer Record must exist in CRM.
- A change is needed to a restricted field that requires SSO/State Specialist approval.

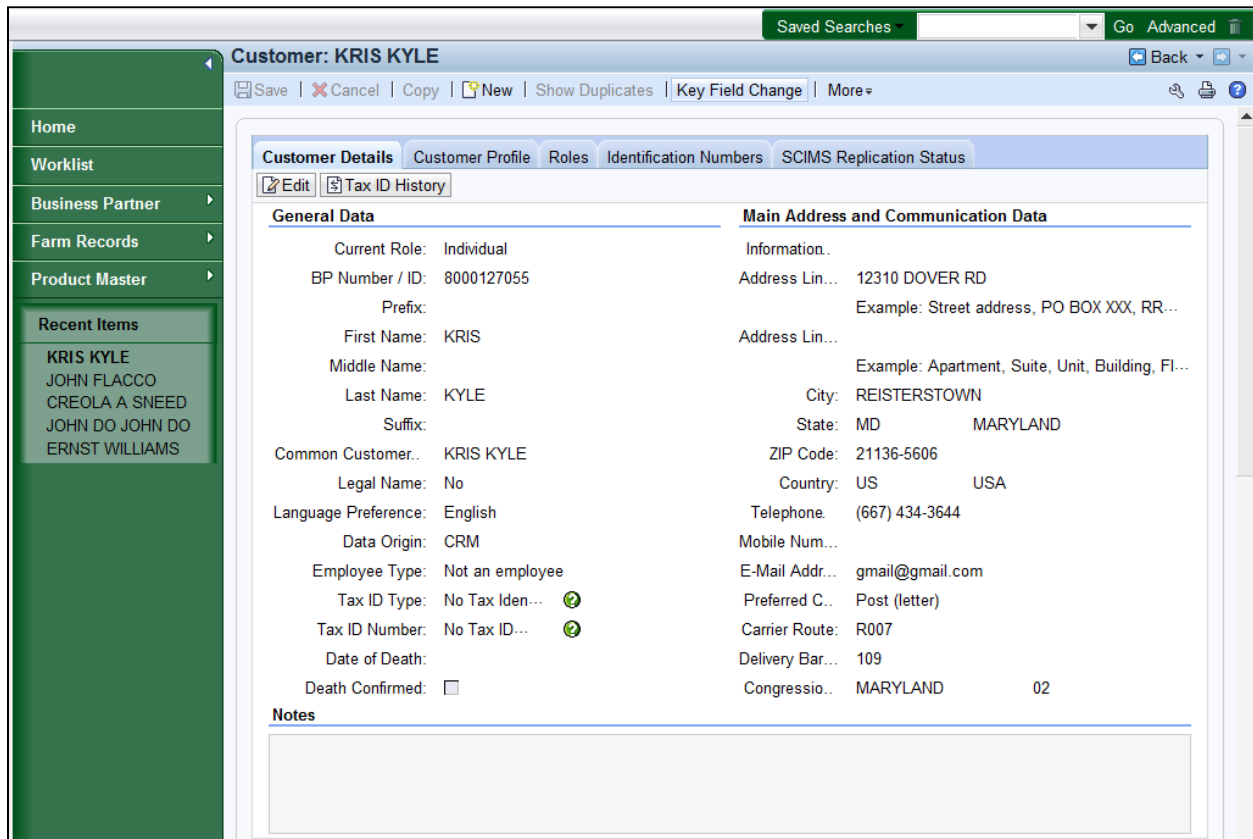
Helpful Hints



- The Key Field Change (KFC) screen has three (3) segments: (1) Inactive Indicator, (2) Tax Type/Number, (3) Program Participation / Associated Counties.
- Only one data segment can be edited per KFC request.
- The "Inactive flag" cannot be set if an outstanding workflow task exists.
- If there is a pending KFC, another KFC for the same segment cannot be submitted until the first KFC has been accepted or rejected.
- When Business Partner Tax ID Type has a value of "No Tax ID Type", users will have the ability to change both Tax ID Type and Tax ID Number on the BP General Data screen and KFC is not required.
- "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:

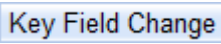
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the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



Customer: KRIS KYLE



General Data	Main Address and Communication Data
Current Role: Individual	Information..
BP Number / ID: 8000127055	Address Lin... 12310 DOVER RD
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: KRIS	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: KYLE	City: REISTERSTOWN
Suffix:	State: MD MARYLAND
Common Customer.. KRIS KYLE	ZIP Code: 21136-5606
Legal Name: No	Country: US USA
Language Preference: English	Telephone (667) 434-3644
Data Origin: CRM	Mobile Num...
Employee Type: Not an employee	E-Mail Addr... gmail@gmail.com
Tax ID Type: No Tax Iden... 	Preferred C.. Post (letter)
Tax ID Number: No Tax ID... 	Carrier Route: R007
Date of Death:	Delivery Bar... 109
Death Confirmed: <input type="checkbox"/>	Congressio.. MARYLAND 02

1. Click the **Key Field Change**  button to open and complete the request.

 In this example, a search was performed to locate Kris Kyle's BP record so a KFC request can be submitted to remove Associated County.

 The restricted fields in the BP record are marked with a green question mark  and include the following fields:

- TIN
- TIN Type
- Active control flag
- Program Participation (PP)
- Associated Counties (AC)

The **Program Participation** and **Associated Counties** are tabs and not



fields, they will not be identified with the green question mark icon. A KFC Request is required to delete FSA and FLP, PP and AC. All other PP and AC changes can be made by the user.

Customer: KRIS KYLE

Customer: KRIS KYLE

Submit

Customer Details

Inactive: New Inactive:
 Tax Type: No Tax Identification New Tax Type:
 Tax Number: NOTAXID New Tax Number:

Associated Counties

Act...	Address	State	County
	1 WINNING DR / OWINGS MILLS MD 21117-4776	MARYLAND	BALTIMORE
	12310 DOVER RD / REISTERSTOWN MD 21136-5606	MARYLAND	BALTIMORE CITY

Program Participation

Act...	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	BALTIMORE COUNTY FAR...	Has interest in the program	Currently enrolled and parti...

Comments

Comments:

Key Field Change History

- Click the Delete button next to the Associated County to request removal of that Associated County.



For fields "Inactive", "Tax Type" and "Tax Number" in the KFC Request in the Customer Details assignment block, the left reflects current status or values; the right reflects the requested new values.

There must be at least one Program Participation on a BP record. So the KFC screen may not show the trash can if the displayed Program Participation is the only one on the BP record.



Customer: KRIS KYLE

Customer: KRIS KYLE

Submit

Customer Details

Inactive: New Inactive:
 Tax Type: No Tax Identification New Tax Type:
 Tax Number: NOTAXID New Tax Number:

Associated Counties

Act...	Address	State	County
	1 WINNING DR / OWINGS MILLS MD 21117-4776	MARYLAND	BALTIMORE

Program Participation

Act...	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	BALTIMORE COUNTY FAR...	Has interest in the program	Currently enrolled and parti...

Comments

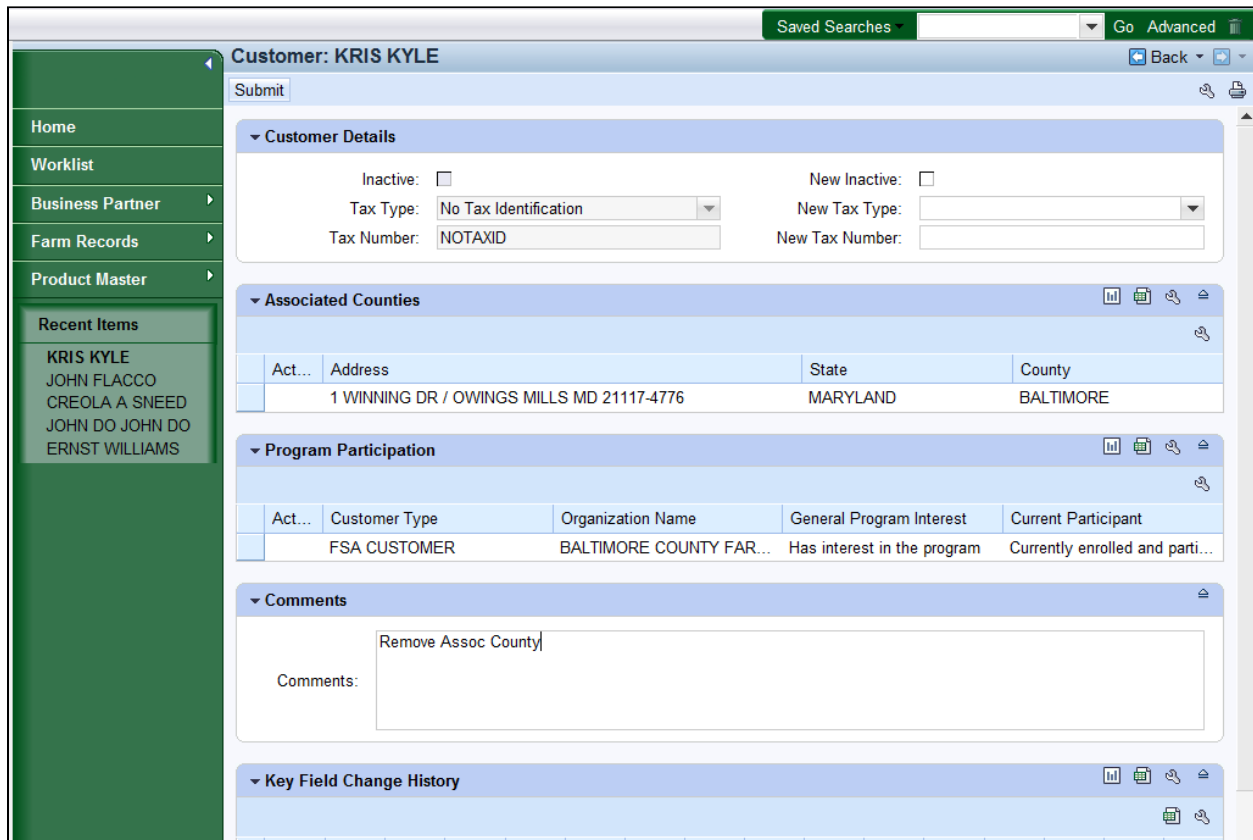
Comments:

Key Field Change History

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

Field	R/O/C	Description
Comments	R	Comments provide a vehicle for submitting, storing, and retrieving text commentary associated with report data cells. This allows you to annotate data so other users can view supporting information associated with a particular piece of data. Example: Remove Assoc County

Customer: KRIS KYLE



Customer: KRIS KYLE

Submit

Customer Details

Inactive: New Inactive:

Tax Type: No Tax Identification New Tax Type:

Tax Number: NOTAXID New Tax Number:

Associated Counties

Act...	Address	State	County
	1 WINNING DR / OWINGS MILLS MD 21117-4776	MARYLAND	BALTIMORE

Program Participation

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	FSA CUSTOMER	BALTIMORE COUNTY FAR...	Has interest in the program	Currently enrolled and parti...


Comments

Remove Assoc County

Comments:


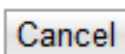
Key Field Change History


4. Click the **Submit**  button.

 Only one Program Participation (and its Associated County) can be included per KFC Request. If a second Program Participation must be deleted, a second KFC Request must be created.

Key Field Change

A workflow request will be created with the changes. Do you want to continue?.

5. Click the **Ok**  button to trigger the workflow message to the SSO/State Office Specialist.



Customer: KRIS KYLE

Customer: KRIS KYLE

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | More


Customer Details | Customer Profile | Roles | Identification Numbers | SCIMS Replication Status

Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number / ID: 8000127055	Address Lin... 12310 DOVER RD
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: KRIS	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: KYLE	City: REISTERSTOWN
Suffix:	State: MD MARYLAND
Common Customer.. KRIS KYLE	ZIP Code: 21136-5606
Legal Name: No	Country: US USA
Language Preference: English	Telephone. (667) 434-3644
Data Origin: CRM	Mobile Num...
Employee Type: Not an employee	E-Mail Addr... gmail@gmail.com
Tax ID Type: No Tax Iden...	Preferred C.. Post (letter)
Tax ID Number: No Tax ID...	Carrier Route: R007
Date of Death:	Delivery Bar... 109
Death Confirmed: <input type="checkbox"/>	Congressio.. MARYLAND 02

Notes

6. Click the **Home**  button.

 After the SSO/State Office Specialist has discharged the Workflow Task, an Alert is sent to all employees of the counties where the BP record is associated.



Home

- Click the **KRIS KYLE** **KRIS KYLE** link in the Recent Items to re-open the BP Record to confirm the change has been completed.

 Alerts can be viewed from the Home Page or the CRM Worklist.



Customer: KRIS KYLE

Customer: KRIS KYLE

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | More

Customer Details | Customer Profile | Roles | Identification Numbers | SCIMS Replication Status

Edit | Tax ID History

General Data	Main Address and Communication Data
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Common Customer.. KRIS KYLE	ZIP Code: 21136-5606
Legal Name: No	Country: US USA
Language Preference: English	Telephone: (667) 434-3644
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Tax ID Type: No Tax Iden...	Preferred C.. Post (letter)
Tax ID Number: No Tax ID...	Carrier Route: R007
Date of Death:	Delivery Bar... 109
Death Confirmed: <input type="checkbox"/>	Congressio.. MARYLAND 02

Notes

8. Scroll down to the **Program Participation** assignment block to verify that the Associated County has been removed.



Customer: KRIS KYLE

The screenshot shows the MIDAS software interface for Customer: KRIS KYLE. The interface includes a left-hand navigation menu with options like Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area displays several sections: Control Flags (with checkboxes for Archived, Inactive, and Restricted), Addresses (with a table of address records), Representative Capacity (with a 'No result found' message), Program Participation (with an 'Associated Counties' table), and Attachments (with a 'No result found' message). The 'Change History' tab under 'Associated Counties' is highlighted in blue.

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	01/19/2015	12/31/9999
	12310 DOVER RD / REISTERSTOWN MD 2113...	<input checked="" type="checkbox"/>	01/19/2015	12/31/9999

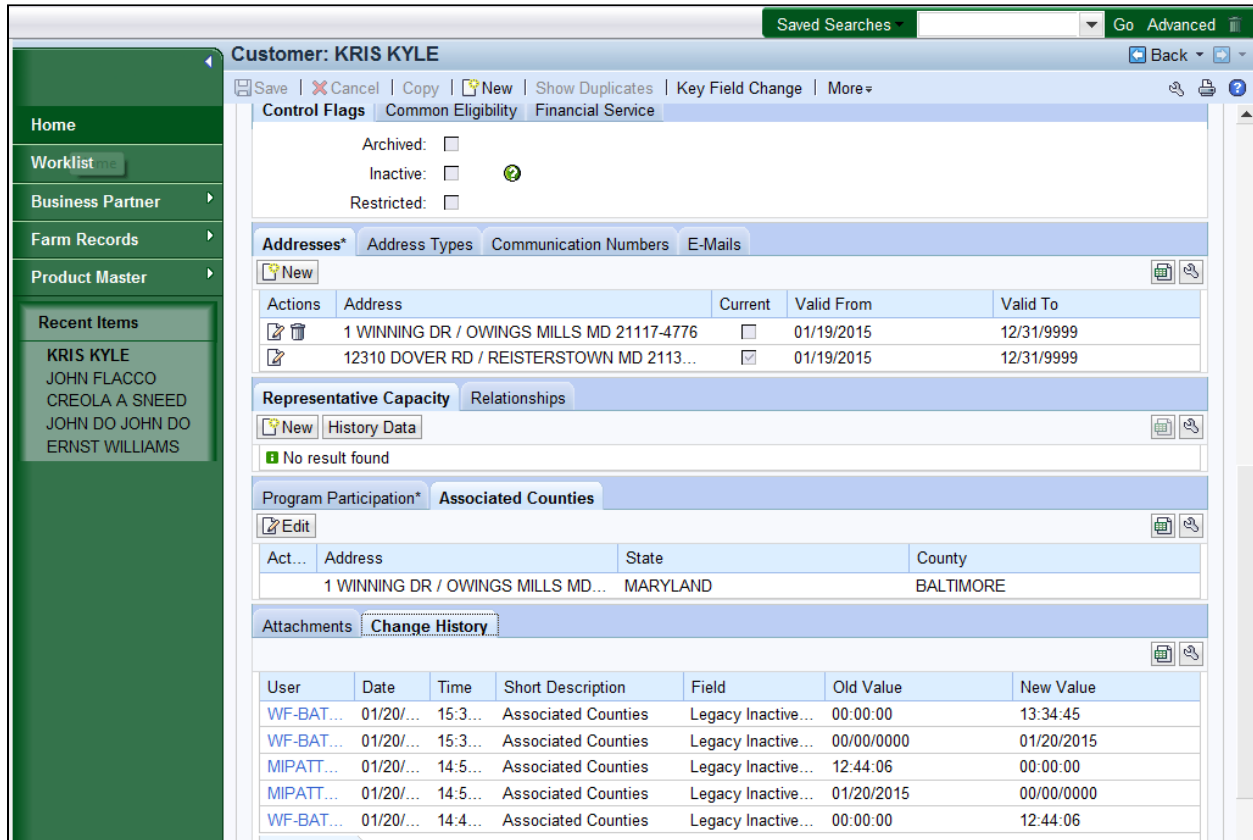
Act...	Address	State	County
	1 WINNING DR / OWINGS MILLS MD...	MARYLAND	BALTIMORE

9. Click the **Change History** **Change History** tab.



The requested Associated County have been deleted.

Customer: KRIS KYLE



Customer: KRIS KYLE

Control Flags | Common Eligibility | Financial Service

Archived: Inactive: Restricted:

Addresses* | Address Types | Communication Numbers | E-Mails

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	01/19/2015	12/31/9999
	12310 DOVER RD / REISTERSTOWN MD 2113...	<input checked="" type="checkbox"/>	01/19/2015	12/31/9999

Representative Capacity | Relationships


Program Participation* | Associated Counties

Act...	Address	State	County
	1 WINNING DR / OWINGS MILLS MD...	MARYLAND	BALTIMORE

Attachments | **Change History**

User	Date	Time	Short Description	Field	Old Value	New Value
WF-BAT...	01/20/...	15:3...	Associated Counties	Legacy Inactive...	00:00:00	13:34:45
WF-BAT...	01/20/...	15:3...	Associated Counties	Legacy Inactive...	00/00/0000	01/20/2015
MIPATT...	01/20/...	14:5...	Associated Counties	Legacy Inactive...	12:44:06	00:00:00
MIPATT...	01/20/...	14:5...	Associated Counties	Legacy Inactive...	01/20/2015	00/00/0000
WF-BAT...	01/20/...	14:4...	Associated Counties	Legacy Inactive...	00:00:00	12:44:06

10. Click the **Home**  button to return to the CRM Home screen. You have completed the transaction.

 The **Change History** tab provides a history of the actions that have been taken against the BP record.



Result

You have successfully submitted a Key Field Change (KFC) Request.