

Purpose

The purpose of this transaction is to manage the members of an SSN Family. All Business Partner (BP) records using the same Social Security Number (SSN) are automatically linked in a family. The link ensures that the user can display any BP record sharing the same SSN and see all related BP records. However, in certain cases, the BP record needs to be de-linked from the SSN Family.

Note: Currently, the DPE must be assigned to the same entity that previously held the SSN in SCIMS and received payment. Additional guidance will be issued when users can edit the DPE.

Trigger

Perform this procedure when the user needs to de-link a Non-Anchor BP record from the Individual (Anchor) BP record.

Prerequisites

- SSN Family only applies to the following entity types / roles: Limited Liability Company (LLC) with SSN as a TIN Type, Revocable Trust (RT) with an SSN as a TIN Type, and an Individual.
- An "Anchor" is the BP record belonging to an SSN Family with the role of "Individual".
- A "Non-Anchor" BP record belongs to an SSN Family and includes the roles of RT or LLC.
- An "Orphan" is an existing Non-Anchor record (LLC or RT) that is not part of an SSN Family.
- The DPE checkbox is a new field on the Individual, LLC and RT BP records. When the Designated Paying Entity (DPE) field is checked it signifies which customer record in SCIMS holds the SSN for payment purposes and Program Participation.

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	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 MUST 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 MUST NOT 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 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: JED CLAMPETT



- 1. Scroll down to display the SSN Family tab.
 - In this scenario, a national search has been performed by the user to locate the BP record. The next step is to de-link a Non-Anchor BP record from the Individual (Anchor) BP record. For more information on the Search process, see the *BP Search Customer Business Partner Record* work instruction.



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2. Click the SSN Family SSN Family tab.



Reasons to de-link an SSN Family member:

- The member gets an EIN.
- Incorrect SSN included for a member.



The user cannot create or delete lines on the SSN Family tab. To de-link a BP record means to remove it from the SSN Family. The user must submit a Key Field Change Request (KFC) in order for the SSO/State Office Specialist to change or remove the TIN (SSN) which will cause the record to be removed from the SSN Family.



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- **3.** Click the **8000028453**⁸⁰⁰⁰⁰²⁸⁴⁵³ link to view the Customer page and begin the process of de-linking the BP (Non-Anchor) record from the SSN Family.
 - Currently, the DPE must be assigned to the same entity that previously held the SSN in SCIMS and received payment. Additional guidance will be issued when users can edit the DPE.



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4. Click the Key Field Change Key Field Change button.

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Be sure the record is NOT in edit mode.



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Customer: CLAMPETT TRUST

- 5. Click the **New Tax Type:** dropdown list icon button to view the available options.
 - In this example, the user is requesting the removal of the Tax Number from the BP record. Once, the action is processed by the SSO/State Office Specialist, the Non-Anchor BP record is removed from the SSN Family.



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6. Select No Tax ID Type No Tax ID Type from the New Tax Type list.



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

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		Example:
		Remove SSN, as the Trust has been dissolved.



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Customer: CLAMPETT TRUST

8. Click the **Submit** Submit button to initiate the workflow message to the SSO/State Office Specialist for review and approval of the KFC.

Key Field Change

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

9. Click the **Ok**^{Ok} button to create the workflow request.

A Workflow Task has been triggered and the KFC is sent to the SSO/State Office Specialist. In addition to the workflow, an alert is provided to the State Office with further information / instructions on the SSN Family.



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10. Select **JED CLAMPETT JED CLAMPETT** from the **Recent Items** to view the BP record.

We will now check to see if the customer has been removed from the SSN Family.



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11. Click the SSN Family SSN Family tab.



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12. Click the **Home** page.

button to return to the MIDAS CRM

The SSN Family tab still indicates that Business Partner 8000028453 (Non-Anchor) belongs to the SSN Family. The reason for the linkage is because the Workflow task hasn't been processed by the SSO/State Specialist. Once the SSO/State Office Specialist processes the Workflow Task, the Business Partner 8000028453 (Non-Anchor) will be removed from the SSN Family.



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13. Worklist Click the Worklist that is shown in the Alerts block.

button to review the Alert message

Alerts are sent to all employees in the County Office(s) where the customer is associated. Alerts require immediate review and may require action. Review the Alert details by clicking the hyperlink from the Worklist Inbox.



Worklist

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14. Click the Alert for Key Field Change Accepted (The triggering application determined you as a

recipient)<u>Alert for Key Field Change Accepted (The triggering applica</u> link to view the specific Alert details.



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15. Click the **Reject** Button to remove the Alert from your Worklist after reviewing.

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The **Description** field indicates if the the KFC has been approved by the SSO/State Office Specialist.

Alerts stay active on all Worklist Tasks until an action has been selected. The recommended action is to select the **Reject** button to clear Alerts from your Worklist. This will not remove the alert from any additional user's worklist. The **Complete** button removes the alert from all recipients worklist and should only be used when the Alert has been resolved. For more information on the alerts process, see the *FN Worklist Process Alerts* work instruction.



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17. Select **JED CLAMPETT** from the **Recent Items** to open the BP record to verify that the KFC has de-linked the BP record from the SSN Family.





18. Scroll down to the SSN Family assignment block.



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19.

Home Click the Home have completed the transaction.

button to return to the CRM page. You

The workflow action has been accepted by the SSO/State Office Specialist and Business Partner 8000028453 (Non-Anchor) has been updated with the removal of the BP record from the SSN Family.



Result

You have de-link a Non-Anchor BP record from the Individual (Anchor) BP record.