

## Purpose

The purpose of this transaction is to approve a Key Field Change (KFC) request. The KFC request form contains important fields that must be controlled. Central control is necessary because often a Business Partner does business with several counties and a change made by one county employee may cause issues in another county. To control key field changes, a KFC request form is required to capture the change and automatically route it (via workflow) to the State Office Specialist(s) (STO) for approval (or rejection). The system determines the STOs by using the Associated Counties on the applicable BP record. An important component of this process is that once a KFC request is approved or rejected, a notification (alert) is automatically disseminated to all office employees on the BP record's associated counties, and the workflow item is discharged from all STO's work lists.

## Trigger

Perform this procedure when a KFC workflow item is received.

## Prerequisites

- A KFC request form has been received via a workflow notification.

## 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:

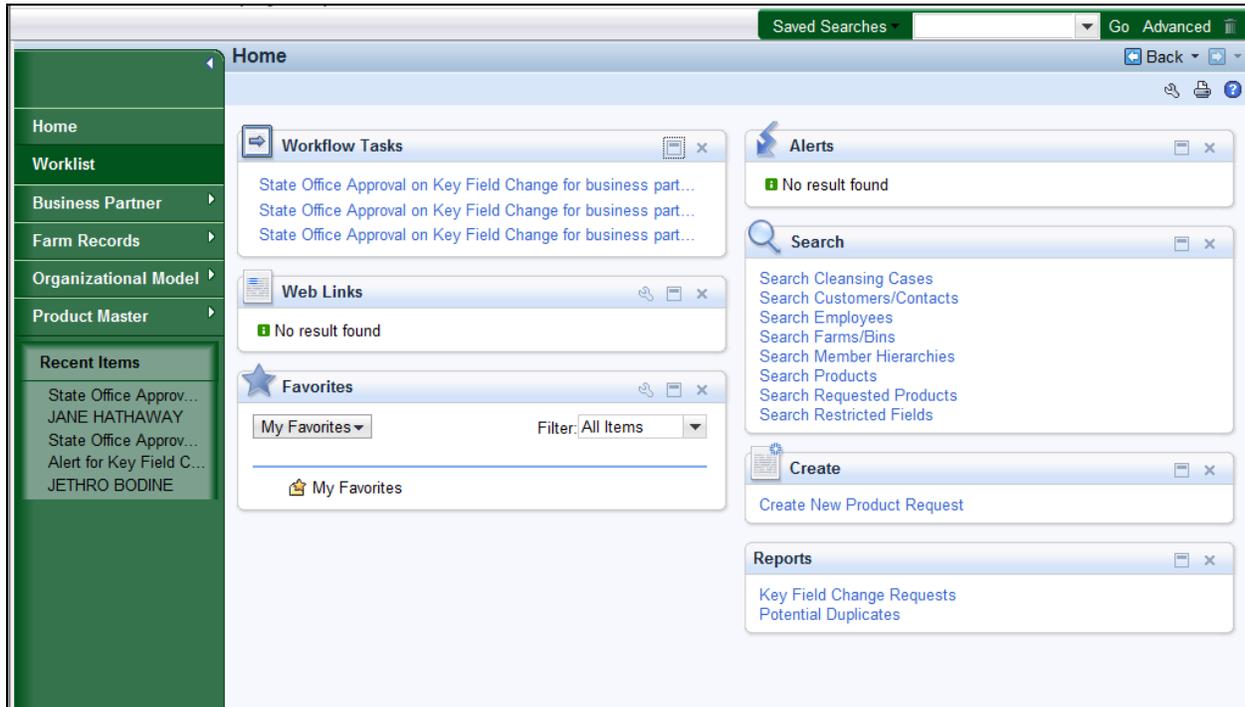
Note type	Icon	Description
A <b>general</b> note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A <b>cautionary</b> note		Use this note to communicate 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 <b>critical</b> note		Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
<b>Contact</b> 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 <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

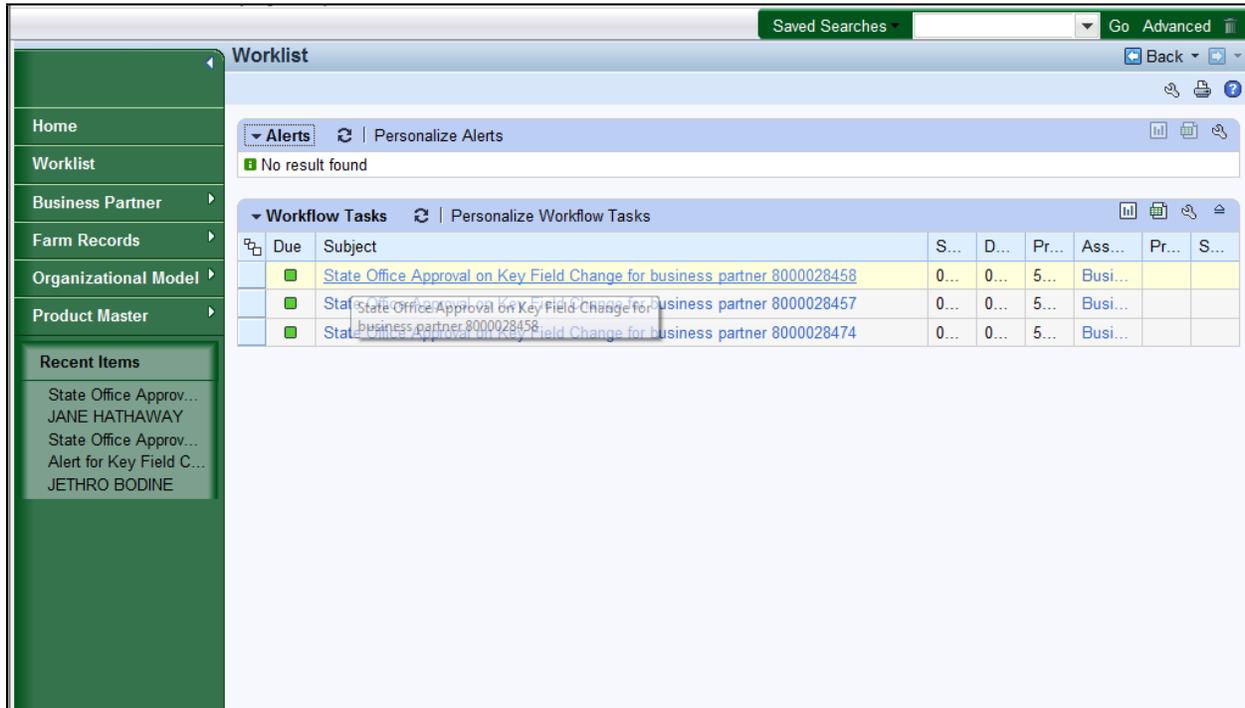


2. Click the **Worklist**  button to view the open workflow tasks that have been assigned to the State Office (STO).

 To control Key Field changes, a Key Field Change (KFC) Request Form is required to capture the change and automatically route it (via workflow) to the STO for approval or rejection.

 In the **Workflow Tasks** assignment block in the upper left, the STO has three (3) workflow items that require STO approval. STO users may see the workflow, but one of the two State Security Officers (SSOs) must take action on the workflow items.

## Worklist



Workflow Tasks

Due	Subject	S...	D...	Pr...	Ass...	Pr...	S...
	State Office Approval on Key Field Change for business partner 8000028458	0...	0...	5...	Busi...		
	State Office Approval on Key Field Change for business partner 8000028457	0...	0...	5...	Busi...		
	State Office Approval on Key Field Change for business partner 8000028474	0...	0...	5...	Busi...		

Recent Items

- State Office Approv...
- JANE HATHAWAY
- State Office Approv...
- Alert for Key Field C...
- JETHRO BODINE

3. Select **State Office Approval on Key Field Change for business partner 8000028458** [State Office Approval on Key Field Change for business partner 8000028458](#) to accept the Key Field Change.



The SSO can either approve or reject the workflow request. If the workflow request contains members of an SSN Family, the members of the family will be listed in the body of the workflow. Selecting **Approved** doesn't automatically update the other members of the SSN Family. It is the responsibility of the SSO to manually change the other SSN Family BP records.



## Workflow Task: State Office Approval on Key Field Change for business partner 8000028458

Workflow Task: State Office Approval on Key Field Change for business partner 8000028458

Decision:

**Workflow Task**

Subject	State Office Approval on Key Field...	Status	Ready
Sent Date	08/28/2014	Priority	5 Medium
Due Date	08/30/2014		

**Description**

Initiator: MITEST15 TRAIN15  
 Old Inactive Flag: False  
 Old TIN Type: No Tax ID Type  
 Old TIN Number: NOTAXID  
 New TIN Type: Social Security Number  
 New TIN Number: 918273650  
 Status: INPROGRESS  
 Comments: WRONG SSN

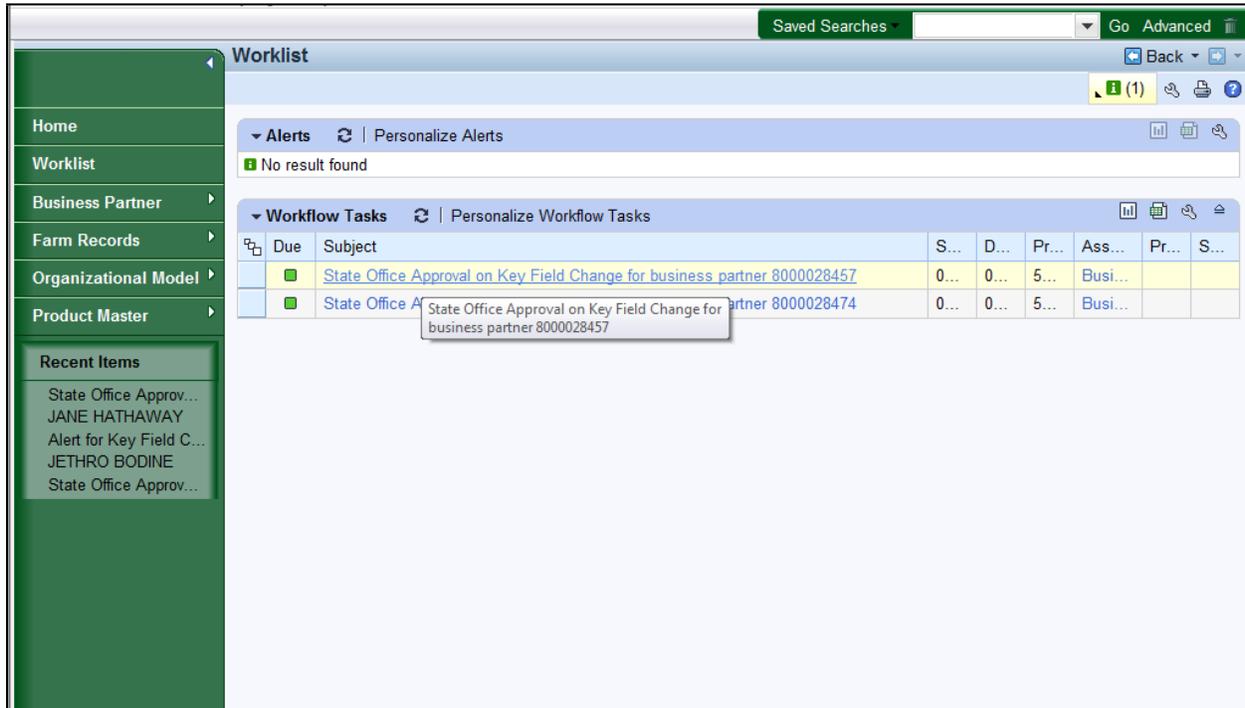
4. Click the **Execute Decision**  button to accept the changes listed on the KFC Request Form.



If the workflow is accepted then the following happens:

- The Workflow item is discharged from all STO users' worklists.
- If the change combination is the Tax Type / TIN the IRS Response Code is changed to "9" which is "Waiting for IRS Response".
- Once the workflow has been approved an alert is sent to all employees in the customers' associated counties.
- The KFC request form reflects the new BP record values and key fields are released and open for change.

## Worklist



Due	Subject	S...	D...	Pr...	Ass...	Pr...	S...
	<a href="#">State Office Approval on Key Field Change for business partner 8000028457</a>	0...	0...	5...	Busi...		
	<a href="#">State Office Approval on Key Field Change for business partner 8000028474</a>	0...	0...	5...	Busi...		

5. Select **State Office Approval on Key Field Change for business partner 8000028457** [State Office Approval on Key Field Change for business partner 8000028457](#) to reject the KFC.



Since the SSO approved the Workflow item, it was discharged from **all** STO users' worklists. Notice that business partner 8000028458 workflow item is no longer listed in the Workflow Task assignment block. An alert was sent to the Associated Counties notifying them of the change to the BP records.



## Workflow Task: State Office Approval on Key Field Change for business partner 8000028457

The screenshot shows a web application interface for a workflow task. The title bar reads "Workflow Task: State Office Approval on Key Field Change for business partner 800002845". Below the title bar, there is a "Decision:" dropdown menu currently set to "Accepted" and an "Execute Decision" button. The main content area is titled "Workflow Task" and displays the following information:

Subject	State Office Approval on Key Field...	Status	Ready
Sent Date	08/27/2014	Priority	5 Medium
Due Date	08/29/2014		

**Description**

Initiator: MITEST15 TRAIN15  
Old Inactive Flag: False  
Old TIN Type: Social Security Number  
Old TIN Number: 345679876  
New TIN Type: Social Security Number  
New TIN Number: 704568761  
Status: INPROGRESS  
Comments: WRONG SSN

6. Click the **Decision:**  dropdown list icon button to view the available options.



## Workflow Task: State Office Approval on Key Field Change for business partner 8000028457

The screenshot shows a web application interface for a workflow task. The title bar reads "Workflow Task: State Office Approval on Key Field Change for business partner 800002845". On the left is a green navigation sidebar with items like Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items. The main content area has a "Decision:" dropdown menu currently set to "Accepted", with a list of options including "Accepted" and "Rejected". An "Execute Decision" button is next to it. Below the dropdown, a table displays task details:

Subject	State Office Approval on Key Field...	Status	Ready
Sent Date	08/27/2014	Priority	5 Medium
Due Date	08/29/2014		

Below the table is a "Description" section with the following text:

```

Initiator: MITEST15 TRAIN15
Old Inactive Flag: False
Old TIN Type: Social Security Number
Old TIN Number: 345679876
New TIN Type: Social Security Number
New TIN Number: 704568761
Status: INPROGRESS
Comments: WRONG SSN
    
```

7. Select **Rejected** from the list.



## Workflow Task: State Office Approval on Key Field Change for business partner 8000028457

The screenshot shows a web application interface for a workflow task. The title bar reads "Workflow Task: State Office Approval on Key Field Change for business partner 800002845". Below the title bar, there is a "Decision:" dropdown menu set to "Rejected" and an "Execute Decision" button. The main content area is titled "Workflow Task" and displays the following information:

Subject	State Office Approval on Key Field...	Status	Ready
Sent Date	08/27/2014	Priority	5 Medium
Due Date	08/29/2014		

Below this table is a "Description" section with the following text:

```

Initiator: MITEST15 TRAIN15
Old Inactive Flag: False
Old TIN Type: Social Security Number
Old TIN Number: 345679876
New TIN Type: Social Security Number
New TIN Number: 704568761
Status: INPROGRESS
Comments: WRONG SSN
  
```

The left sidebar contains navigation options: Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items. The Recent Items list includes "State Office Approv...", "JANE HATHAWAY", "Alert for Key Field C...", "JETHRO BODINE", and "State Office Approv...".

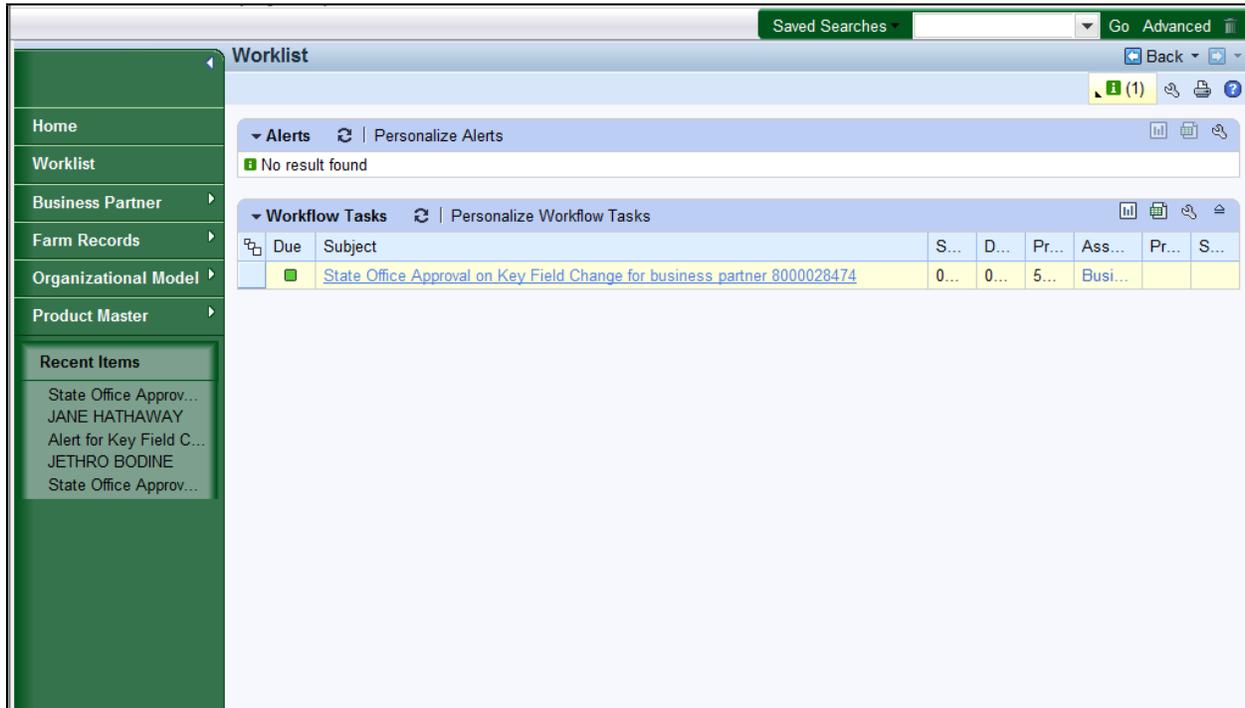
8. Click the **Execute Decision**  button to reject the KFC request form.



The SSO may reject a KFC request. A valid reason for rejection could be a change that negatively impacts an Associated County attached to the BP record. If the workflow is rejected, the following occurs:

- The BP record is not updated with new values.
- The workflow items are discharged from all STO users' worklists.
- If the change combination is tax type and tax number, the KFC request form shows blank in the "change to" fields.

## Worklist



Due	Subject	S...	D...	Pr...	Ass...	Pr...	S...
	State Office Approval on Key Field Change for business partner 8000028474	0...	0...	5...	Busi...		

9. Select **State Office Approval on Key Field Change for business partner 8000028474** [State Office Approval on Key Field Change for business partner 8000028474](#) to have the SSO manually correct the Social Security Number (SSN) data element.



If necessary, the SSO can manually update the BP record.



Notice that business partner 8000028457 workflow item no longer listed in the Workflow Task assignment block. An alert was sent to the Associated Counties notifying them to the change to the BP records.



## Workflow Task: State Office Approval on Key Field Change for business partner 8000028474

The screenshot shows a web-based workflow task interface. On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items. The main content area is titled 'Workflow Task: State Office Approval on Key Field Change for business partner 8000028474'. It includes a 'Decision' dropdown set to 'Accepted' and an 'Execute Decision' button. Below this is a 'Workflow Task' section with a table of task details:

Subject	Status
State Office Approval on Key Field...	Ready
Sent Date	Priority
08/27/2014	5 Medium
Due Date	
08/29/2014	

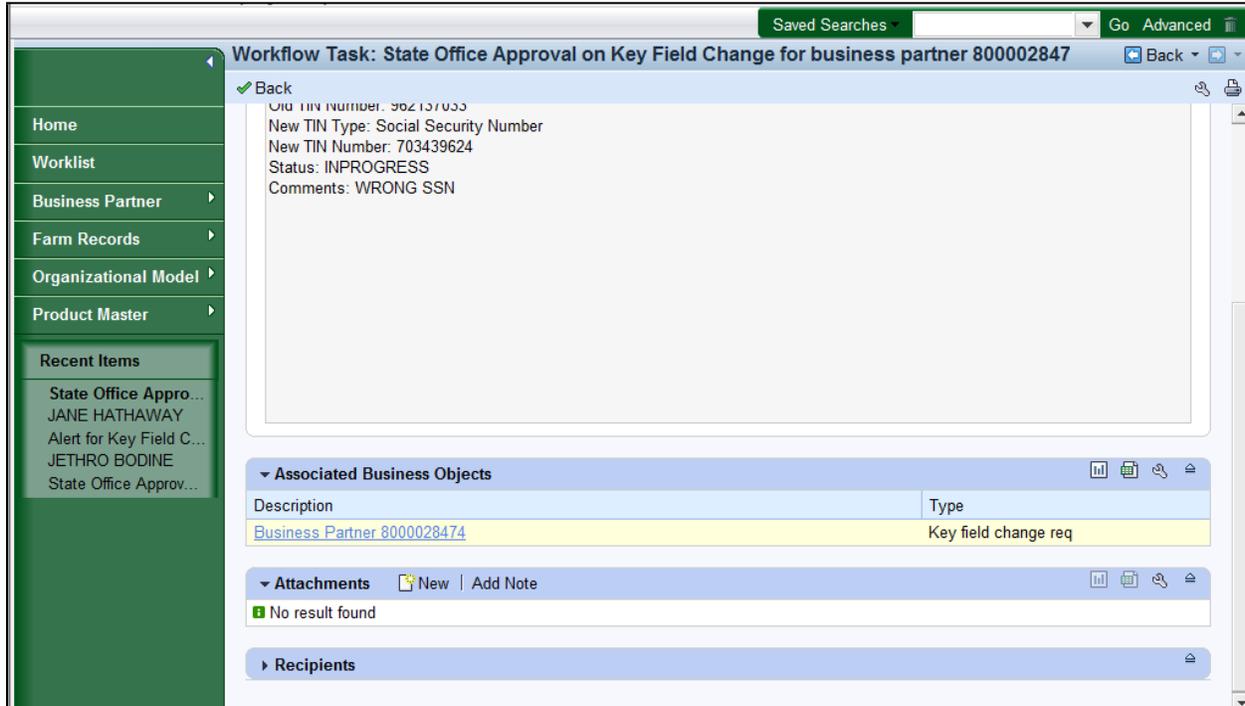
Below the table is a 'Description' section containing the following text:

```

Initiator: MITEST15 TRAIN15
Old Inactive Flag: False
Old TIN Type: Social Security Number
Old TIN Number: 962137033
New TIN Type: Social Security Number
New TIN Number: 703439624
Status: INPROGRESS
Comments: WRONG SSN
    
```

10. Scroll to the **Associated Business Objects** assignment block.

## Workflow Task: State Office Approval on Key Field Change for business partner 8000028474



Workflow Task: State Office Approval on Key Field Change for business partner 8000028474

Back

Old TIN Number: 992137033  
 New TIN Type: Social Security Number  
 New TIN Number: 703439624  
 Status: INPROGRESS  
 Comments: WRONG SSN

Description	Type
<a href="#">Business Partner 8000028474</a>	Key field change req

Attachments  | Add Note

No result found

Recipients

11. Select **Business Partner 8000028474** [Business Partner 8000028474](#) to open the Customer: page.



Rather than accepting the requested TIN modification, the SSO can also manually edit the BP's TIN.



## Customer: MAX BODINE

Customer: MAX BODINE

Save | Cancel | New | Show Duplicates | Key Field Change | Copy | 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: 8000028474	Address Li. 1900 E HIGHWAY 175
Prefix:	Street #, Street Name
First Name: MAX	Address Li.
Middle Name:	Apartment, Suite, Unit, Building, Floor
Last Name: BODINE	City: KAUFMAN
Suffix:	State: TX TEXAS
Common Customer: MAX BODINE	ZIP Code: 75142-8859
Legal Name: No	Country: US USA
Language Preference: English	Communic. Post (letter)
Data Origin: CRM	Carrier Route:
Employee Type: Not an employee	Delivery Ba..
Tax ID Type: Social Sec...	Congressio..
Tax ID Number: 962137033	
IRS Response Code: Waiting for IRS response	
IRS Attempts: 0	

12. Click the **Edit**  button to edit the BP customer record.



**Customer: MAX BODINE**

Customer: MAX BODINE

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

Last Name:  City:   
 Suffix:  State:  TEXAS  
 Common Customer:  ZIP Code:   
 Legal Name:  Country:  USA  
 Language Preference:  Communic.   
 Data Origin:  Carrier Route:   
 Employee Type:  Delivery Ba.:   
 Tax ID Type:  Congressio.:   
 Tax ID Number:   
 IRS Response Code:   
 IRS Attempts:   
 Date of Death:   
 Death Confirmed:

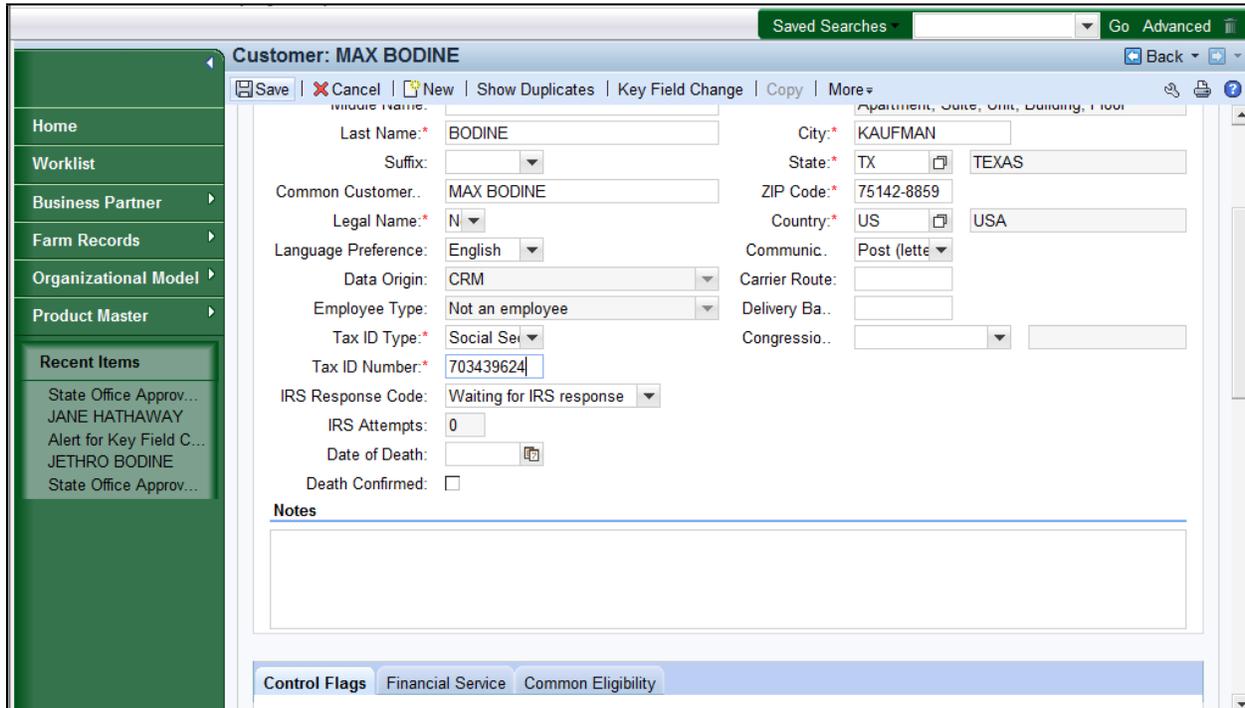
Notes

Control Flags | Financial Service | Common Eligibility

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

Field	R/O/C	Description
Tax ID Number:	R	<b>Example:</b> 703439624

## Customer: MAX BODINE



Customer: MAX BODINE

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

Last Name:  City:   
 Suffix:  State:  TEXAS  
 Common Customer:  ZIP Code:   
 Legal Name:  Country:  USA  
 Language Preference:  Communic.   
 Data Origin:  Carrier Route:   
 Employee Type:  Delivery Ba.:   
 Tax ID Type:  Congressio.:   
 Tax ID Number:   
 IRS Response Code:   
 IRS Attempts:   
 Date of Death:   
 Death Confirmed:

Notes

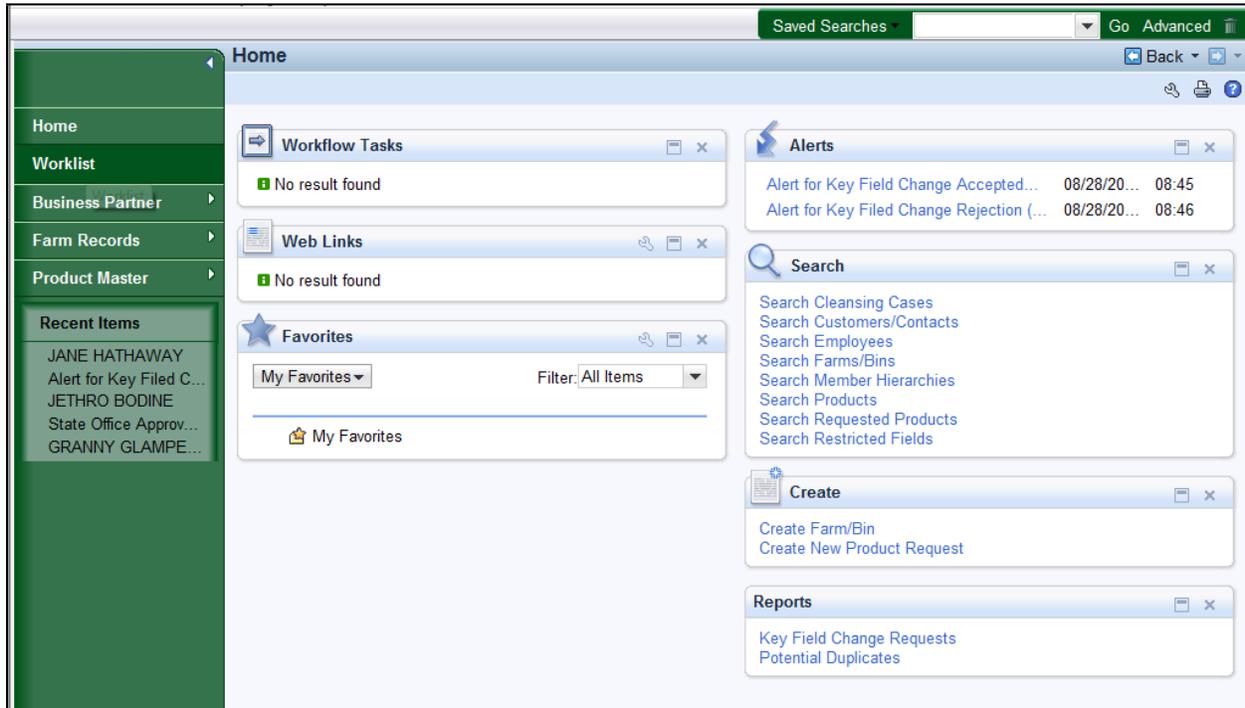
Control Flags Financial Service Common Eligibility

14. Click the **Save**  button to record the changes to the BP record.



If the SSO manually changes the BP record's change combination values, the work item is discharged and removed from all STO users' work lists but the Associated Counties **are not** alerted to the change.

## Home



15. Click the **Worklist**  button to review the Alerts and the Work list items.

 Each time the workflow is updated, the change details are sent to the underlying BP master record and added to the KFC history log.



## Worklist

Worklist

Alerts | Personalize Alerts

Due	Description	Sent Date	Expiration Date	Priority
	Alert for Key Field Change Accepted (The triggering applica...	08/28/2014	08/29/2014	High
	Alert for Key Filed Change Rejection (The triggering applica...	08/28/2014	08/29/2014	High

Workflow Tasks | Personalize Workflow Tasks

Due	Subject	Sent Date	Due Date	Priority	Associated Bus...	Process	Sub Pro...
No result found							

Recent Items

- JANE HATHAWAY
- Alert for Key Filed C...
- JETHRO BODINE
- State Office Approv...
- GRANNY GLAMPE...

16. Click the **Home**  button to return CRM page. You have completed the transaction.
-  Once a SSO discharges the work list item, it is removed from the other STO users' work lists. The Accepted and Reject work items created alerts to notify the Associated Counties of the changes that have been made to the BP record. The manually updated record didn't alert the Associated Counties.



## Result

You have Approved, Rejected, and manually updated a KFC record.