

## Purpose

The purpose of this work instruction is to describe how to rescind a Spousal Signature Authority to sign documents now or in the future.

## Trigger



Perform this procedure when a customer request request to revoke signature authority.




## Prerequisites

- Signature Authority can be revoked between spouses based on a specific period of time.
- A Representative Capacity Marriage relationship must be established before you can rescind spousal signature authority.

## 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:

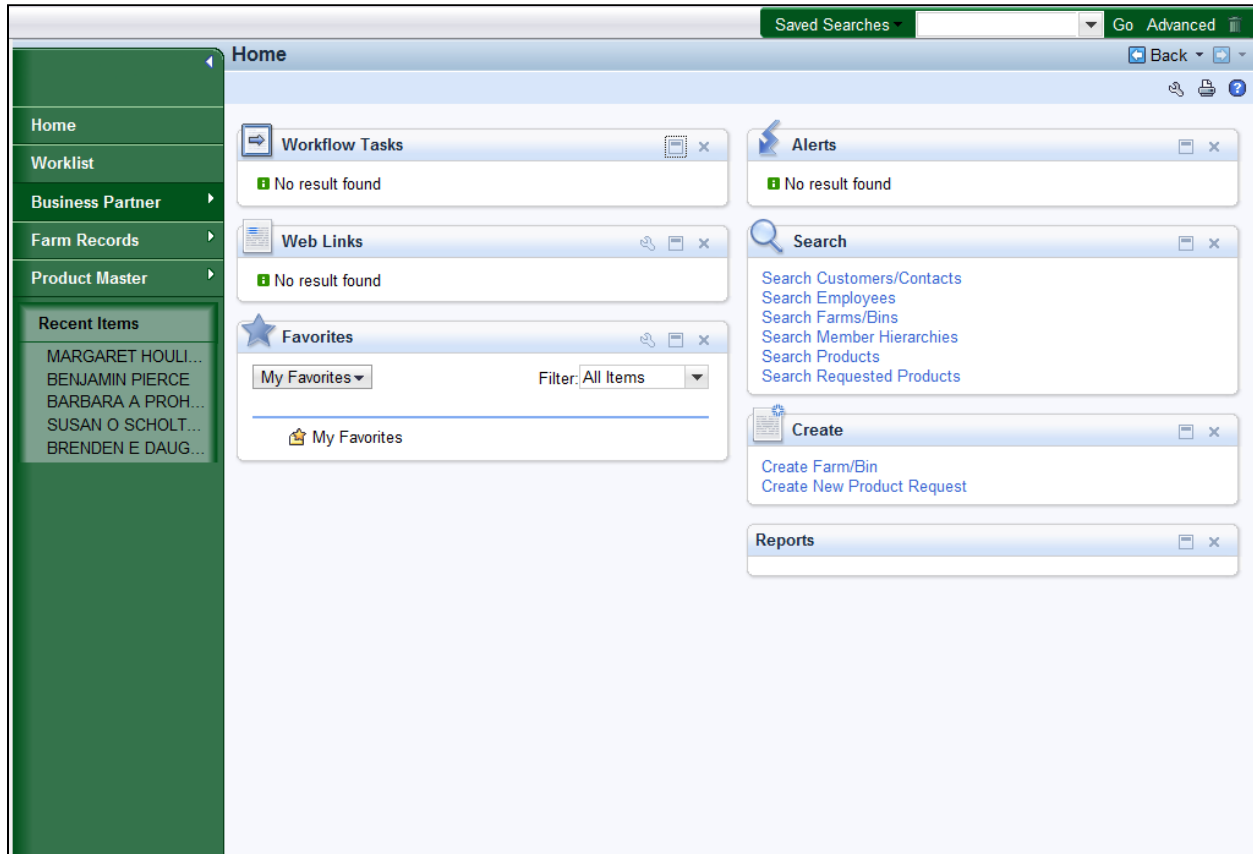
Note type	Icon	Description
A <b>general</b> note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A <b>cautionary</b> note		Use this note to communicate 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 **Business Partner**  button go to the Accounts page.



## Accounts

A screenshot of a web application interface titled "Accounts". The interface has a dark green sidebar on the left with navigation links: Home, Worklist, Business Partner, Farm Records, Product Master, and a Recent Items section listing names like MARGARET HOULI... and BENJAMIN PIERCE. The main content area is light blue and contains a "Search" window with links for "Search Customers/Contacts", "Search Employees", and "Search Member Hierarchies". There is also a "Reports" window. At the top right, there are "Saved Searches" and "Go Advanced" options, and a "Back" button.


3. Click the **Search Customers/Contacts** [Search Customers/Contacts](#) link to go to the Search: Customer page.



### Search: Customers

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

Field	R/O/C	Description
First Name	O	Business Partner's First Name <b>Example:</b> Benj*

 Wildcard placed before and after the search term displays results that contain the search term anywhere. A wildcard before the search term displays results where the term is NOT the first word. A wildcard after the search term displays results where the word IS the first word. For further instruction please review the *BP Search Customer Business Partner Record* work instruction.

## Search: Customers

Saved Searches
Go Advanced

Search: Customers
Back

Home

Worklist

Business Partner

Farm Records

Product Master

**Recent Items**

BENJAMIN PIERCE

MARGARET HOULI...

ALAN A SMITH

BENJIMAN H PIER...

JED CLAMPETT

**Search Criteria** hide Search Fields

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is	Benj*	⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
Tax ID Number	is		⊕ ⊖
Tax ID Type	is		⊕ ⊖
Archived Flag	is		⊕ ⊖
Inactive Flag	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Attempts	equals		⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖
Associated County	is	ALL COUNTIES	⊕ ⊖
Service Center	is	ALL CENTERS	⊕ ⊖

Maximum Number of Results: 100

Search Clear Reset      Save Search As:  Save

**Result List**

✚ New Customer Print Copy Refresh

Inact...	BP Number/ID	Common Customer Name	Ta...	Pa...	Ta...	Ho...	S...	C...	S...	Z...	T...	E...	IRS Resp...	I...
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- Click the **Search**  button to retrieve the list of customers that meet the search criteria.



## Search: Customers

Saved Searches
Go Advanced

Search: Customers
Back

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
  - BENJAMIN PIERCE
  - MARGARET HOULI...
  - ALAN A SMITH
  - BENJIMAN H PIER...
  - JED CLAMPETT

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is	BENJ*	⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
Tax ID Number	is		⊕ ⊖
Tax ID Type	is		⊕ ⊖
Archived Flag	is		⊕ ⊖
Inactive Flag	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Attempts	equals		⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖
Associated County	is	ALL COUNTIES	⊕ ⊖
Service Center	is	ALL CENTERS	⊕ ⊖

Maximum Number of Results:

Save Search As:

**Result List: 19 Customers Found**

New Customer

Inact...	BP Number/ID	Common Customer Name	Ta...	Pa...	Ta...	Ho...	S...	C...	S...	Z...	T...	E...	IRS Resp...	I...
<input type="checkbox"/>	8000017333	BENJAMIN MONACO	NO...	<input type="checkbox"/>	No...		1..	M.	M.	2..			IRS not v...	0

6. Scroll to display the **Result List** to select your customer.



## Search: Customers

Search: Customers

Archived Flag is  
 Inactive Flag is  
 IRS Response Code is  
 IRS Attempts equals  
 Associated State is ALL STATES  
 Associated County is ALL COUNTIES  
 Service Center is ALL CENTERS

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 19 Customers Found

Inact...	BP Number/ID	Common Customer Name	Ta...	Pa...	Ta...	Ho...	S...	C...	S...	Z...	T...	E...	IRS Resp...	I...
<input type="checkbox"/>	8000017333	BENJAMIN MONACO	NO...	<input type="checkbox"/>	No...	1...	M...	M...	2...				IRS not v...	0
<input type="checkbox"/>	8000028399	BENJAMIN PIERCE	12...	<input checked="" type="checkbox"/>	So...	1...	O...	M...	2...	+			Waiting fo...	0
<input type="checkbox"/>	8000015409	BENJAMIN A OR BENJAMIN PIERCE	NO...	<input type="checkbox"/>	No...	1...	S...	M...	2...				IRS not v...	0
<input type="checkbox"/>	8000019924	BENJAMIN A CURLISS	NO...	<input type="checkbox"/>	No...	1...	F...	M...	2...				IRS not v...	0
<input type="checkbox"/>	8000025472	BENJAMIN A MOSE	NO...	<input type="checkbox"/>	No...	8...	R...	M...	2...	+	t...		IRS not v...	0
<input type="checkbox"/>	8000024196	BENJAMIN A STEPHENS	NO...	<input type="checkbox"/>	No...	2...	G...	I...	4...				IRS not v...	0
<input type="checkbox"/>	8000014894	BENJAMIN E MILLER	NO...	<input type="checkbox"/>	No...	1...	F...	T...	7...				IRS not v...	0
<input type="checkbox"/>	8000015704	BENJAMIN E COCHRANE	NO...	<input type="checkbox"/>	No...	1...	S...	M...	2...	+			IRS not v...	0
<input type="checkbox"/>	8000015521	BENJAMIN H HULL	NO...	<input type="checkbox"/>	No...	1...	F...	M...	2...				IRS not v...	0
<input type="checkbox"/>	8000015900	BENJAMIN L MC GINLEY	NO...	<input type="checkbox"/>	No...	1...	C...	I...	4...				IRS not v...	0

◀Back 1 2 Forward▶

- Select the **Common Customer Name** from the Results List (BENJAMIN PIERCE) label **BENJAMIN PIERCE** to go to the Customer page.





**Customer: BENJAMIN PIERCE**

Customer: BENJAMIN PIERCE

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

Tax ID Number: 129430199

IRS Response Code: Waiting for IRS response  
 IRS Attempts: 0  
 Date of Death:  
 Death Confirmed:

**Notes**

**Control Flags** | Financial Service | Common Eligibility

Archived:   
 Inactive:   
 Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	08/14/2014	12/31/9999

**Representative Capacity** | Relationships | SSN Family

New | History Data

Act...	Type	Business Partner	Status	Effective Date	Revoked/Cancelled...
	Is Married To	MARGARET HOULI...	Active	08/14/2014	12/31/9999

**Program Participation\*** | Associated Counties

Edit


8. Scroll to display the **Representative Capacity** assignment block.

## Customer: BENJAMIN PIERCE

Customer: BENJAMIN PIERCE


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

Control Flags | Financial Service | Common Eligibility

Archived:   
 Inactive:    
 Restricted:


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

New

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	08/14/2014	12/31/9999


Representative Capacity | Relationships | SSN Family

New | History Data

Act...	Type	Business Partner	Status	Effective Date	Revoked/Cancelled...
	Is Married To	MARGARET HOULI...	Active	08/14/2014	12/31/9999

Program Participation\* | Associated Counties

Edit



Act...	Customer Type	Servicing Organization	General Program Interest	Current Participant
	FSA CUSTOMER	62623	Unknown	Not currently participating

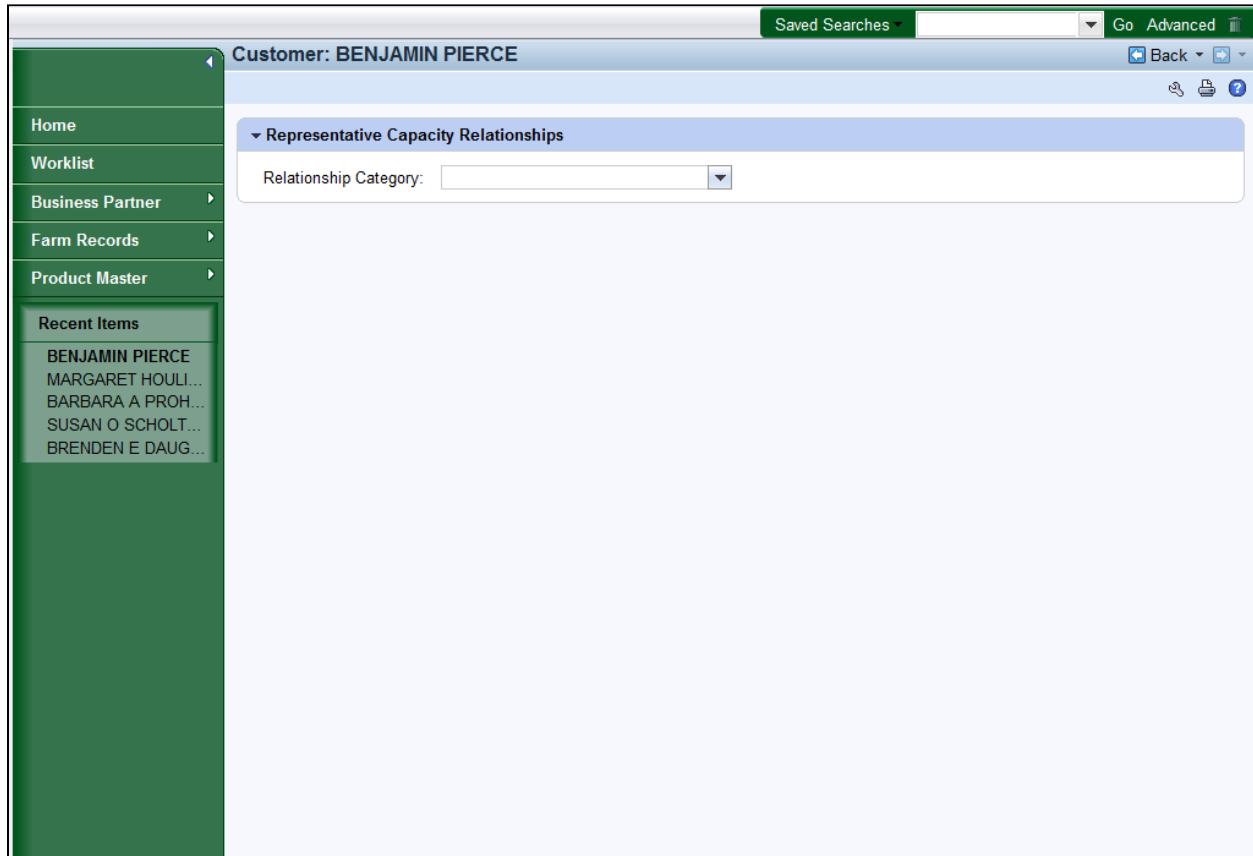
Attachments

Folder | Attachment | URL | With Template | More


Name	Type	Created By	Created On
------	------	------------	------------

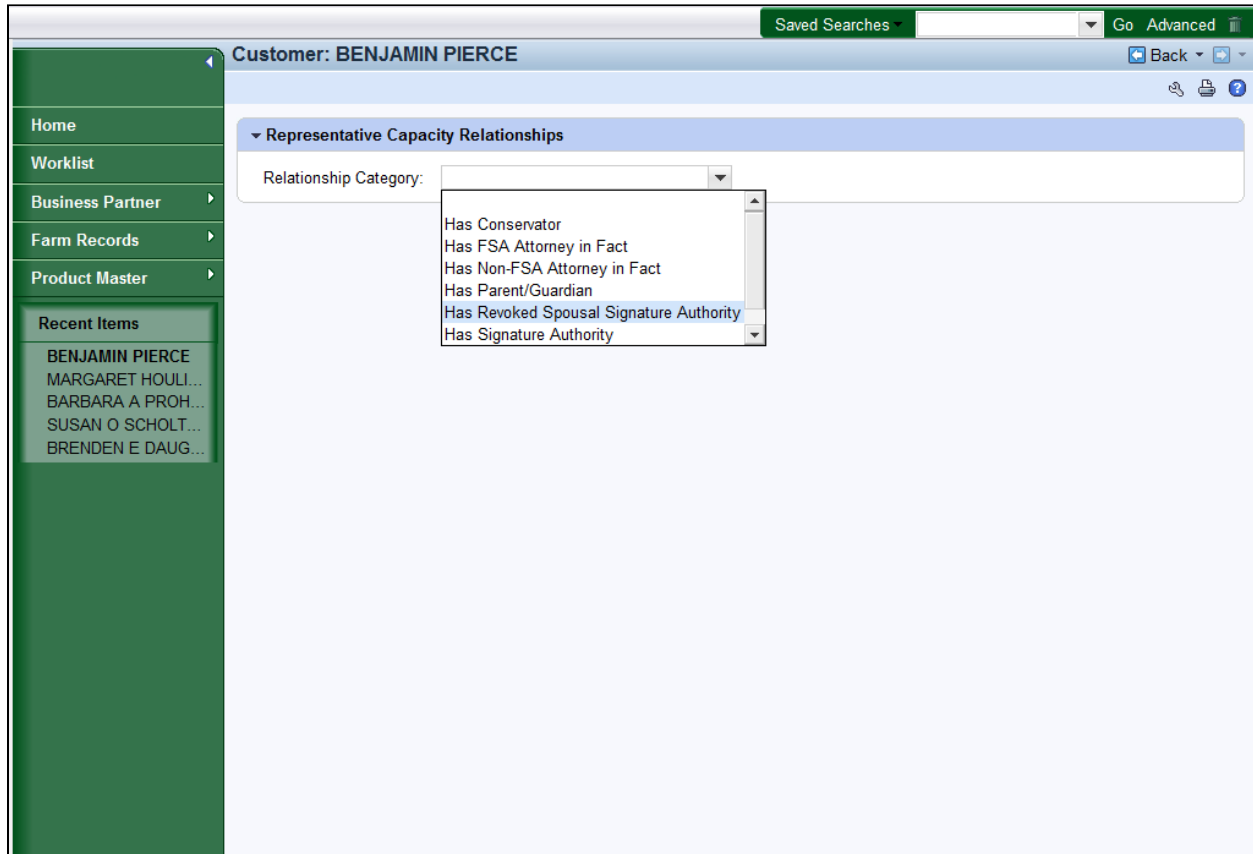
9. Click the **New**  button in the **Representative Capacity** assignment block.

 The **New**  button triggers a new page that allows the user to select a representative capacity relationship.


**Customer: BENJAMIN PIERCE**

The screenshot displays the MIDAS web application interface for the customer BENJAMIN PIERCE. The interface includes a navigation menu on the left with options: Home, Worklist, Business Partner, Farm Records, and Product Master. Below these is a 'Recent Items' section listing: BENJAMIN PIERCE, MARGARET HOULI..., BARBARA A PROH..., SUSAN O SCHOLT..., and BRENDEN E DAUG... The main content area is titled 'Representative Capacity Relationships' and features a 'Relationship Category:' dropdown menu.

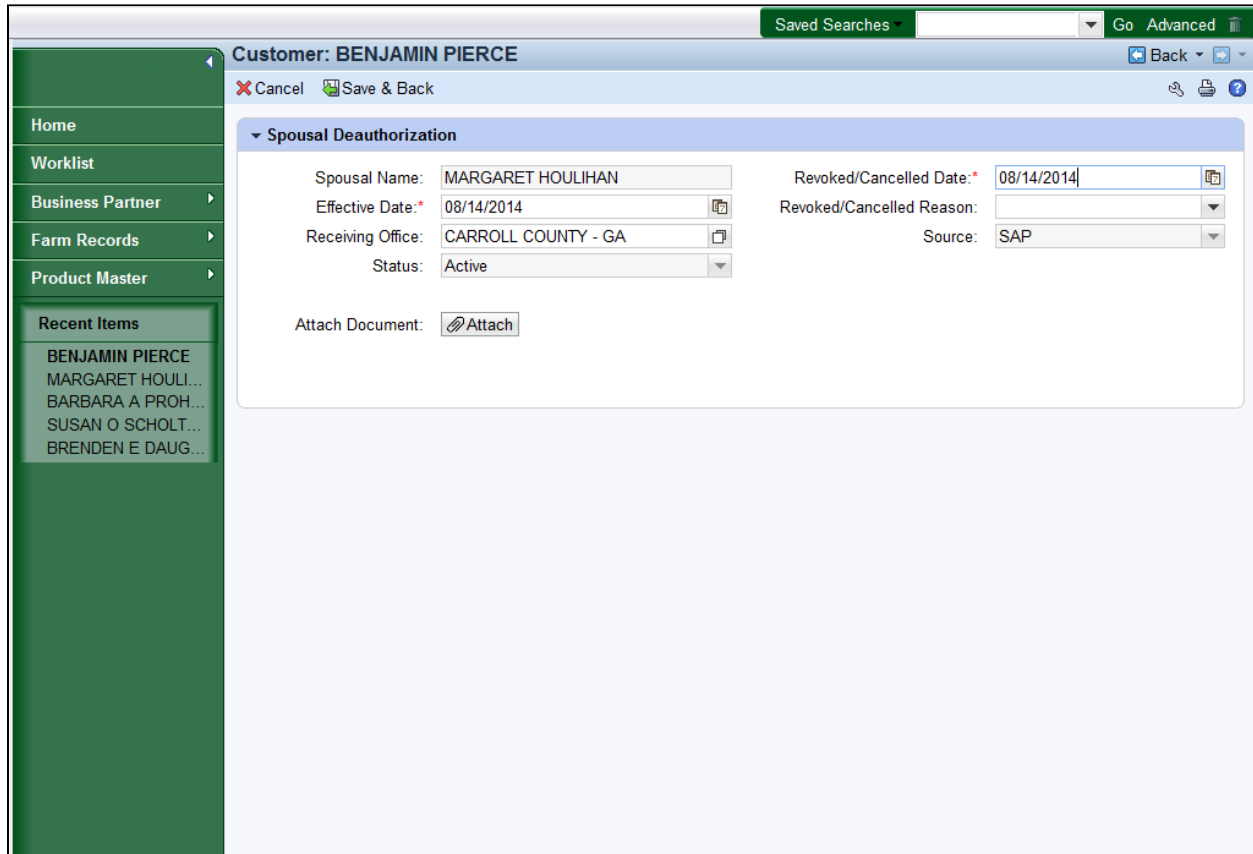
10. Click the **Relationship Category:**  dropdown list icon to display the list of Representative Capacity relationship categories.

**Customer: BENJAMIN PIERCE****11. Select Has Revoked Spousal Signature**

**Authority** **Has Revoked Spousal Signature Authority** from the **Relationship Category** list.

 If you select the **Revoked Spousal Signature Authority** relationship before the Marriage relationship has been created, an error message will display.

## Customer: BENJAMIN PIERCE



Customer: BENJAMIN PIERCE

Spousal Deauthorization

Spousal Name: MARGARET HOULIHAN

Effective Date: 08/14/2014

Receiving Office: CARROLL COUNTY - GA

Status: Active

Revoked/Cancelled Date: 08/14/2014

Revoked/Cancelled Reason:

Source: SAP

Attach Document: Attach

12. Click the **Revoked/Cancelled Reason:**  dropdown list icon button to select a Revoke / Cancelled reason.

 The **Revoked/Cancelled Reason:** field is a required field.



## Customer: BENJAMIN PIERCE

Customer: BENJAMIN PIERCE

Spousal Deauthorization

Spousal Name: MARGARET HOULIHAN

Effective Date: 08/14/2014

Receiving Office: CARROLL COUNTY - GA

Status: Active

Revoked/Cancelled Date: 08/14/2014


Revoked/Cancelled Reason:

Source:

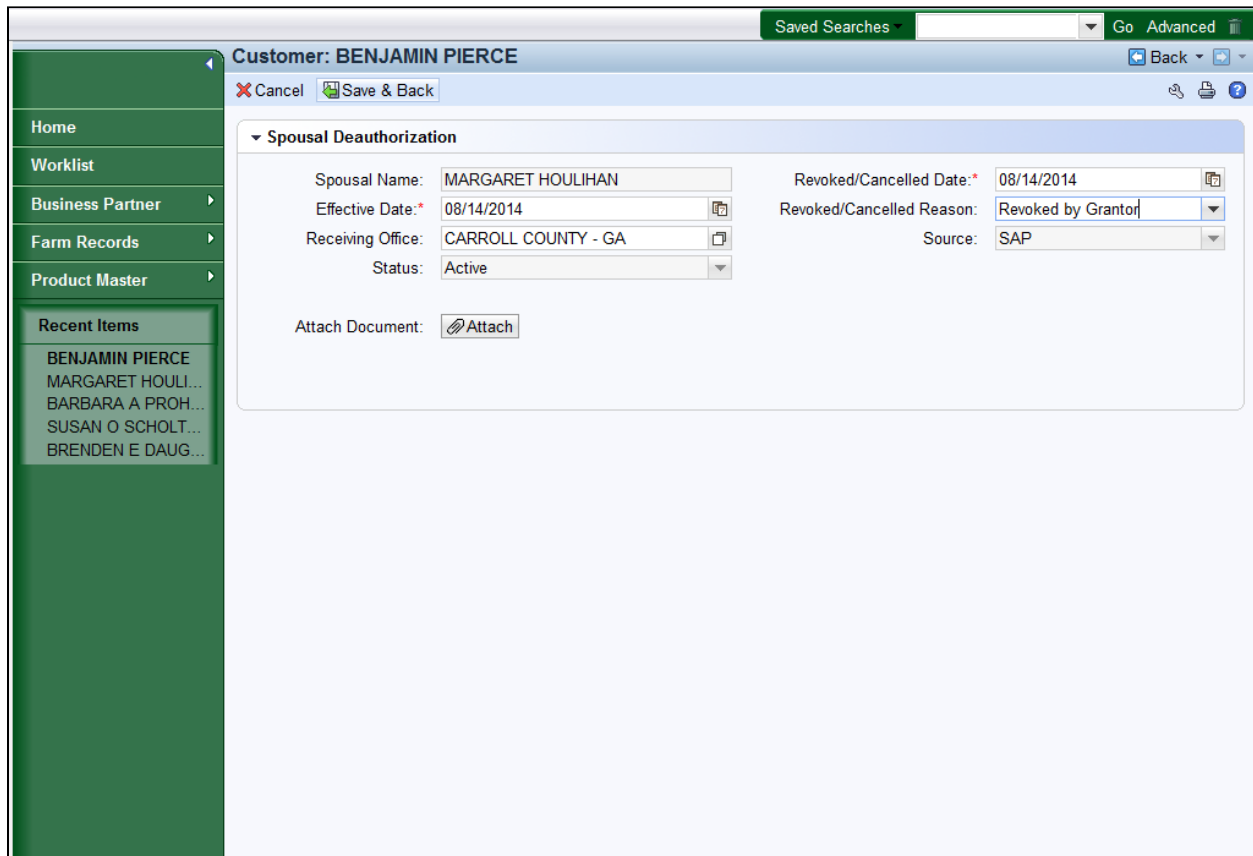
- Revoked By County Office
- Revoked by Grantor
- Revoked by Grantor (Future Date)
- Service Center Error

Attach Document: Attach

13. Select **Revoked by Grantor** from the **Revoked / Cancelled Reason** list.

 Indicates who granted to rescind the spousal authority.

## Customer: BENJAMIN PIERCE



Customer: BENJAMIN PIERCE

Spousal Deauthorization

Spousal Name: MARGARET HOULIHAN

Effective Date: 08/14/2014

Receiving Office: CARROLL COUNTY - GA

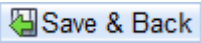
Status: Active

Revoked/Cancelled Date: 08/14/2014

Revoked/Cancelled Reason: Revoked by Grantor


Source: SAP


Attach Document: [Attach](#)

14. Click the **Save & Back**  button to record the changes to the BP record and return to the Customer page.

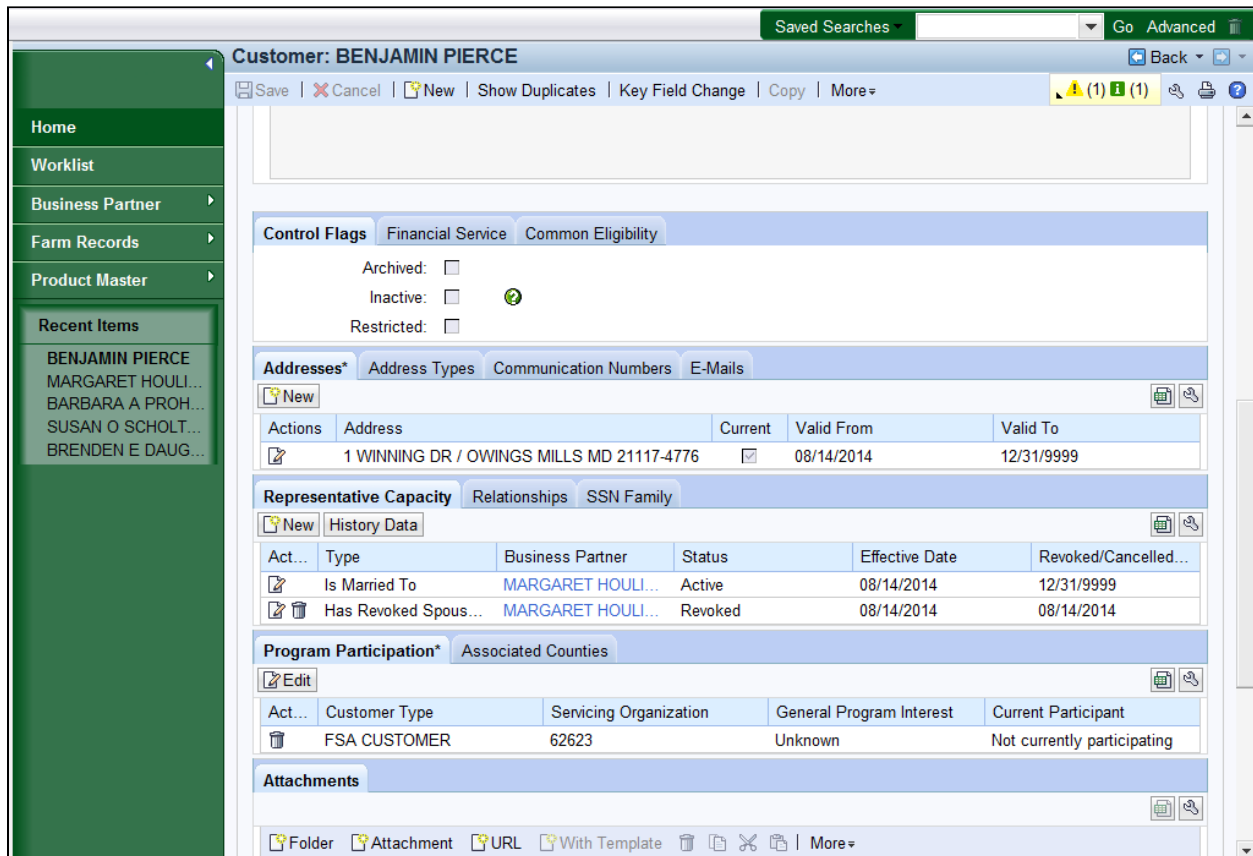
### Submit Relationship

Is all the data displayed complete and accurate? Active representative capacity data cannot be modified after it is submitted. It can only be revoked. Are you sure you wish to continue?

15. Click the **Yes**  button to acknowledge the action performed.


 After the **Yes** button is selected, you are returned to the Customer record and the line item is added to the **Representative Capacity** assignment block. In this example, the customer has a revoked Spousal Signature Authority effective August 14, 2014.

## Customer: BENJAMIN PIERCE





Customer: BENJAMIN PIERCE

Control Flags: Financial Service, Common Eligibility


Archived:   
 Inactive:    
 Restricted:



Addresses\* Address Types Communication Numbers E-Mails

 New


Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	08/14/2014	12/31/9999


Representative Capacity Relationships SSN Family

 New History Data





Act...	Type	Business Partner	Status	Effective Date	Revoked/Cancelled...
	Is Married To	MARGARET HOULI...	Active	08/14/2014	12/31/9999
	Has Revoked Spous...	MARGARET HOULI...	Revoked	08/14/2014	08/14/2014

Program Participation\* Associated Counties


 Edit

Act...	Customer Type	Servicing Organization	General Program Interest	Current Participant
	FSA CUSTOMER	62623	Unknown	Not currently participating

Attachments

Folder Attachment URL With Template     More

16. Click the **Home**  button to return to the CRM page. You have completed the transaction.

 In the **Representative Capacity** assignment block, the customer record that has elected to rescind Spousal Signature Authority will list the revoked spouse in the **Representative Capacity** assignment block with a Status of Revoked and the **Edit** icon visible. The customer record whose spousal signature authority was revoked, will include the text Is Revoked in the Status field of the Representative Capacity assignment block and no **Edit** icon visible.





## Result

You have revoked spousal signature authority.