

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 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

1. Start the transaction from the MIDAS CRM Home Page.

Home

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2. Click the **Business Partner** Business Partner button go to the Accounts page.



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Saved Searches -🕶 Go Advanced 🗂 Accounts 🖸 Back 🝷 🖸 👻 Home **—** × Search Reports Worklist Search Customers/Contacts Search Employees Search Member Hierarchies **Business Partner** Farm Records Product Master **Recent Items** MARGARET HOULI ... **BENJAMIN PIERCE** BARBARA A PROH. SUSAN O SCHOLT. BRENDEN E DAUG.

3. Click the Search Customers/ContactsSearch Customers/Contacts link to go to the Search: Customer page.

Accounts



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

Field	R/O/C	Description
First Name	0	Business Partner's First Name
		Example: 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.



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5. Click the **Search** button to retrieve the list of customers that meet the search criteria.



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



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



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



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- 9. Click the New SNew button in the Representative Capacity assignment block.
 - The **New** button triggers a new page that allows the user to select a representative capacity relationship.



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



Saved Searches -▼ Go Advanced iii Customer: BENJAMIN PIERCE 🖸 Back 💌 💟 👻 ی 🖨 📀 Home - Representative Capacity Relationships Worklist Relationship Category: -**Business Partner** Has Conservator Farm Records Has FSA Attorney in Fact Has Non-FSA Attorney in Fact Product Master Has Parent/Guardian Has Revoked Spousal Signature Authority **Recent Items** Has Signature Authority **BENJAMIN PIERCE** MARGARET HOULI ... BARBARA A PROH. SUSAN O SCHOLT. BRENDEN E DAUG.

Customer: BENJAMIN PIERCE

11. Select Has Revoked Spousal Signature Authority Has Revoked Spousal Signature Authority from the Relationship Category list.

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



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





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



Indicates who granted to rescind the spousal authority.



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

Submit Relationship



- 15. Click the Yes 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.



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16. Home Click the Home

have completed the transaction.

button to return to the CRM page. You

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.