

Purpose

The purpose of this process is to inactivate a Business Partner record. The system restricts the access to this flag to State Specialists. Although only the State Security Specialist (SSO) is authorized to act on the KFC. The County Office User requests a BP record to be inactivated by submitting a Key Field Change (KFC) request and clicking on the 'Inactive' button. The workflow is routed to the STOs, but the record cannot be initiated directly from the workflow. Instead the SSO must execute several manual steps to check the Inactive Flag on the BP record.

If the SSO decides to disapprove the request, they need to "Reject" worklist item. This will trigger the alert to notify the County users of the decision and remove it from the SSO's worklist.

Trigger


Perform this procedure when a KFC request has been initiated by an authorized user and the workflow has been received by the SSO to set the Inactive flag for a BP record.





Prerequisites

- A Key Change Request (KFC) was submitted with the Inactive flag selected.
- Before inactivating a customer record, SSO's should follow 1CM Paragraph **177B** to ensure the customer can be inactivated.

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:

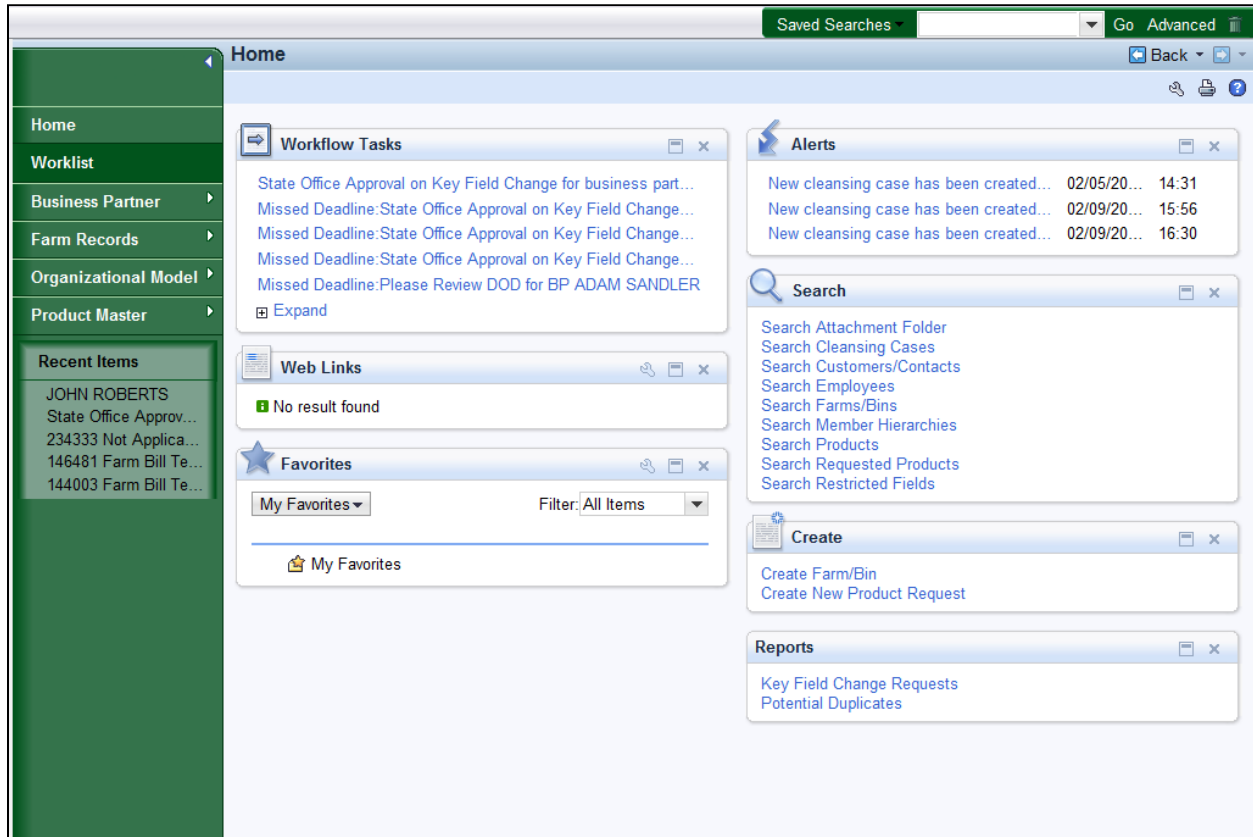
| Note type | Icon | Description |
|--------------------------------------|---|--|
| A general note of information |  | This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use |

| | | |
|---------------------------------|---|--|
| | | 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

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

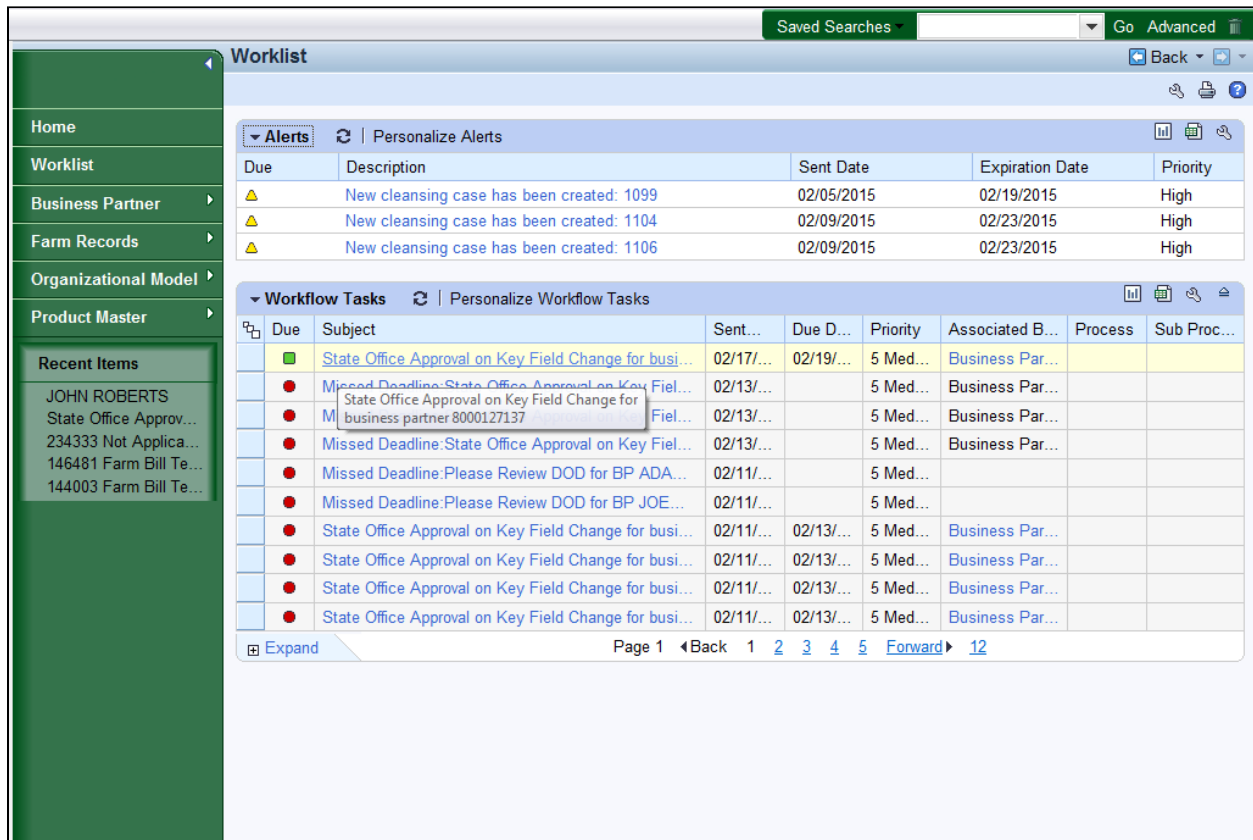
Home



2. Click the **Worklist** button to view the Workflow Task notification that the SSO received.

 The user has submitted a KFC to set the Inactive flag for a BP record. The SSO is notified by a workflow task notification which is listed in the Workflow Task assignment block located in the upper left of the CRM screen.

Worklist



The screenshot shows the Worklist application interface. On the left is a navigation menu with options: Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items. The main area is divided into two sections: Alerts and Workflow Tasks.

Alerts Section:

| Due | Description | Sent Date | Expiration Date | Priority |
|-----|---|------------|-----------------|----------|
| | New cleansing case has been created: 1099 | 02/05/2015 | 02/19/2015 | High |
| | New cleansing case has been created: 1104 | 02/09/2015 | 02/23/2015 | High |
| | New cleansing case has been created: 1106 | 02/09/2015 | 02/23/2015 | High |

Workflow Tasks Section:

| Due | Subject | Sent... | Due D... | Priority | Associated B... | Process | Sub Proc... |
|-----|---|-----------|-----------|----------|-----------------|---------|-------------|
| | State Office Approval on Key Field Change for busi... | 02/17/... | 02/19/... | 5 Med... | Business Par... | | |
| | Missed Deadline:State Office Approval on Key Fiel... | 02/13/... | | 5 Med... | Business Par... | | |
| | Missed Deadline:State Office Approval on Key Fiel... | 02/13/... | | 5 Med... | Business Par... | | |
| | Missed Deadline:Please Review DOD for BP ADA... | 02/11/... | | 5 Med... | | | |
| | Missed Deadline:Please Review DOD for BP JOE... | 02/11/... | | 5 Med... | | | |
| | State Office Approval on Key Field Change for busi... | 02/11/... | 02/13/... | 5 Med... | Business Par... | | |
| | State Office Approval on Key Field Change for busi... | 02/11/... | 02/13/... | 5 Med... | Business Par... | | |
| | State Office Approval on Key Field Change for busi... | 02/11/... | 02/13/... | 5 Med... | Business Par... | | |
| | State Office Approval on Key Field Change for busi... | 02/11/... | 02/13/... | 5 Med... | Business Par... | | |

Page 1 ◀ Back 1 2 3 4 5 Forward ▶ 12

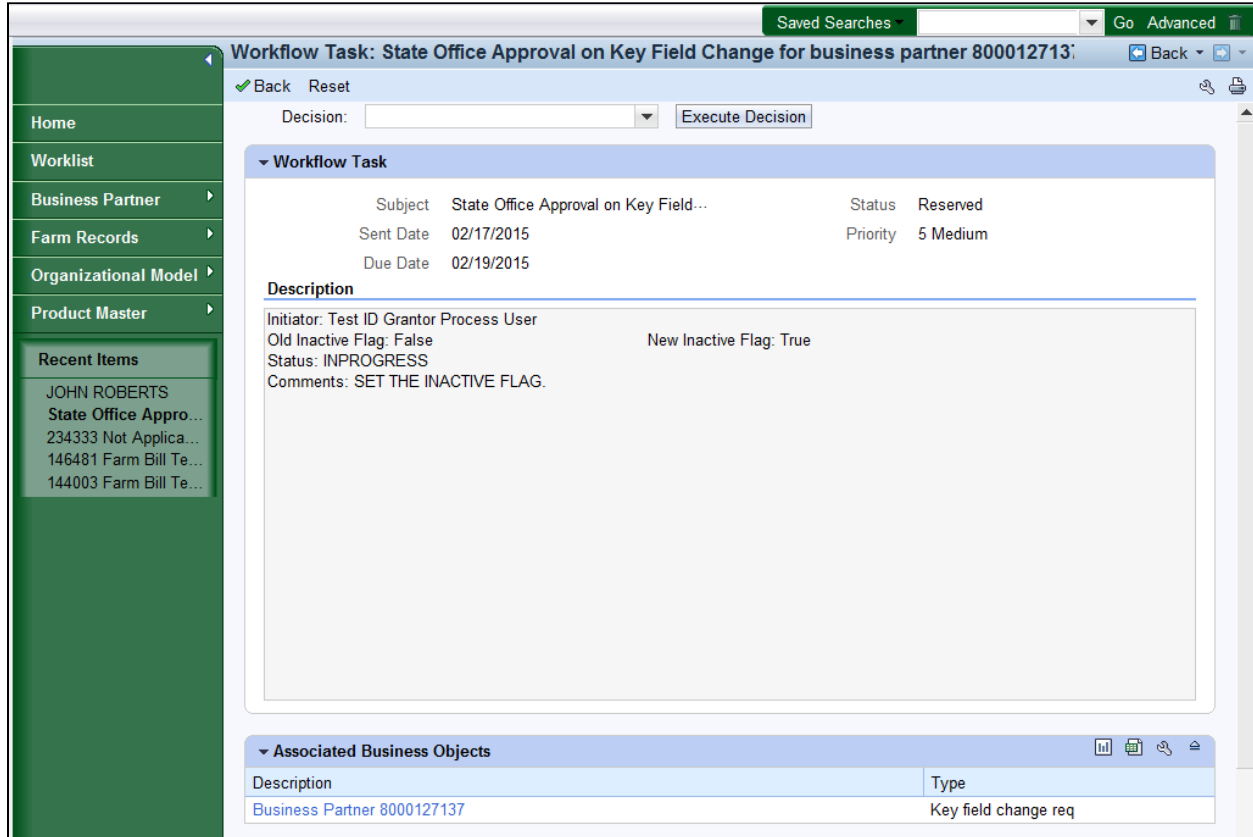
- Click the **State Office Approval on Key Field Change for business partner 8000127137** [State Office Approval on Key Field Change for busi](#) link to open the Workflow Task assignment.



When the "Inactive" indicator was selected on the KFC request, two system checks were performed:

- If the BP record has the DPE set to active and is part of an SSN Family, it will display an error message advising the user to move the DPE to another member of the SSN Family prior to setting the Inactive flag.
- When the Inactive flag was selected on the KFC, CRM checked to see if there are any existing workflows. If yes, then an error message is displayed advising that the outstanding workflows must be executed prior to to setting the Inactive flag.

Workflow Task: State Office Approval on Key Field Change for business partner 8000127137



Workflow Task: State Office Approval on Key Field Change for business partner 8000127137

Decision:

Workflow Task

| | | | |
|-----------|---------------------------------------|----------|----------|
| Subject | State Office Approval on Key Field... | Status | Reserved |
| Sent Date | 02/17/2015 | Priority | 5 Medium |
| Due Date | 02/19/2015 | | |

Description

Initiator: Test ID Grantor Process User
 Old Inactive Flag: False
 Status: INPROGRESS
 Comments: SET THE INACTIVE FLAG.

New Inactive Flag: True

Associated Business Objects

| Description | Type |
|-----------------------------|----------------------|
| Business Partner 8000127137 | Key field change req |

- Click the **Execute Decision** button to approve the KFC request.



Workflow Task: State Office Approval on Key Field Change for business partner 8000127137

The screenshot shows a web-based workflow task interface. On the left is a green navigation sidebar with menu items: Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items. The main content area has a title bar with 'Workflow Task: State Office Approval on Key Field Change for business partner 8000127137' and navigation buttons like 'Back' and 'Reset'. Below the title bar is a 'Decision' dropdown and an 'Execute Decision' button. The main task details are displayed in a light blue box with the following information:

| Workflow Task | | | |
|---------------|---------------------------------------|----------|----------|
| Subject | State Office Approval on Key Field... | Status | Reserved |
| Sent Date | 02/17/2015 | Priority | 5 Medium |
| Due Date | 02/19/2015 | | |

Below the task details is a 'Description' section with the following text:

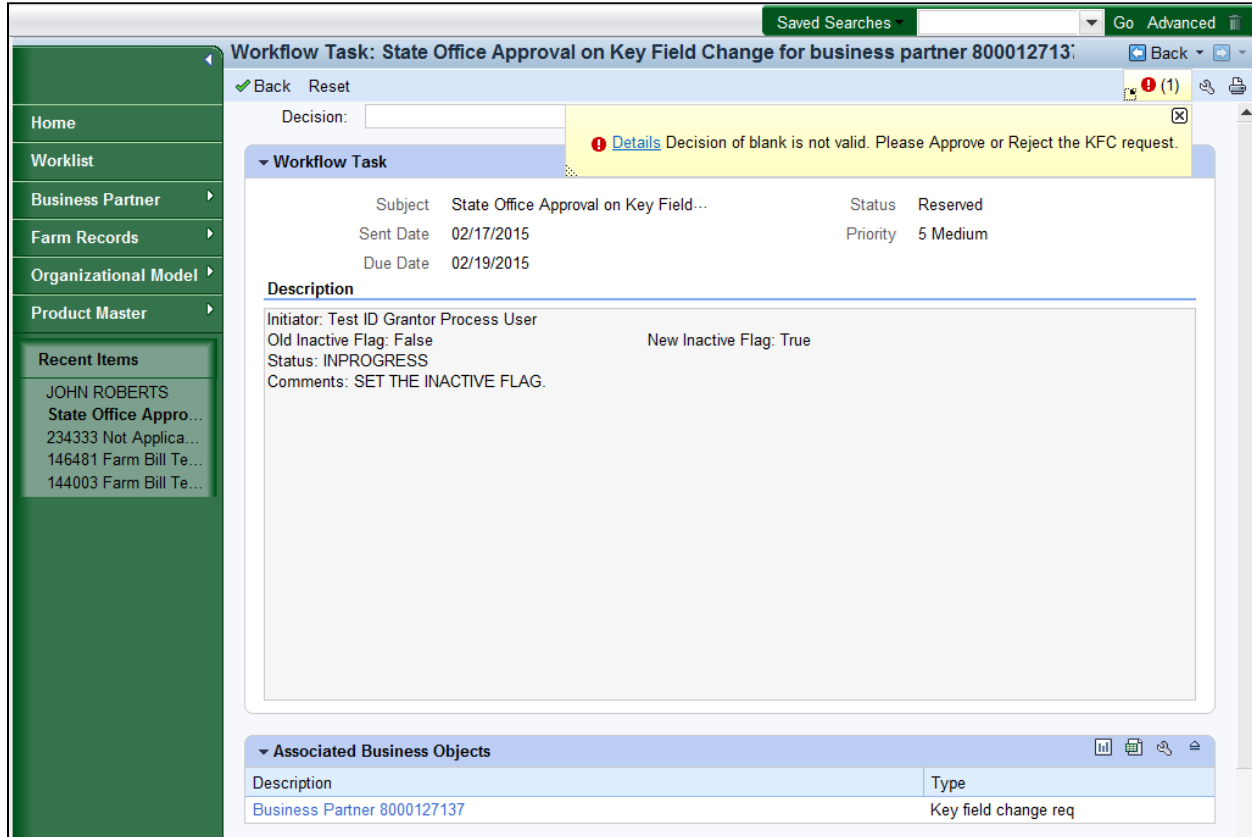
Initiator: Test ID Grantor Process User
 Old Inactive Flag: False
 Status: INPROGRESS
 Comments: SET THE INACTIVE FLAG.

At the bottom of the main content area is an 'Associated Business Objects' section with a table:

| Description | Type |
|-----------------------------|----------------------|
| Business Partner 8000127137 | Key field change req |

5. Click the **Expand message area**  label to expand the message window.

Workflow Task: State Office Approval on Key Field Change for business partner 8000127137



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 8000127137". A yellow error message box is displayed, stating: "Decision of blank is not valid. Please Approve or Reject the KFC request." Below the error message, the task details are shown:




| Workflow Task | | | |
|---------------|---------------------------------------|----------|----------|
| Subject | State Office Approval on Key Field... | Status | Reserved |
| Sent Date | 02/17/2015 | Priority | 5 Medium |
| Due Date | 02/19/2015 | | |

Description

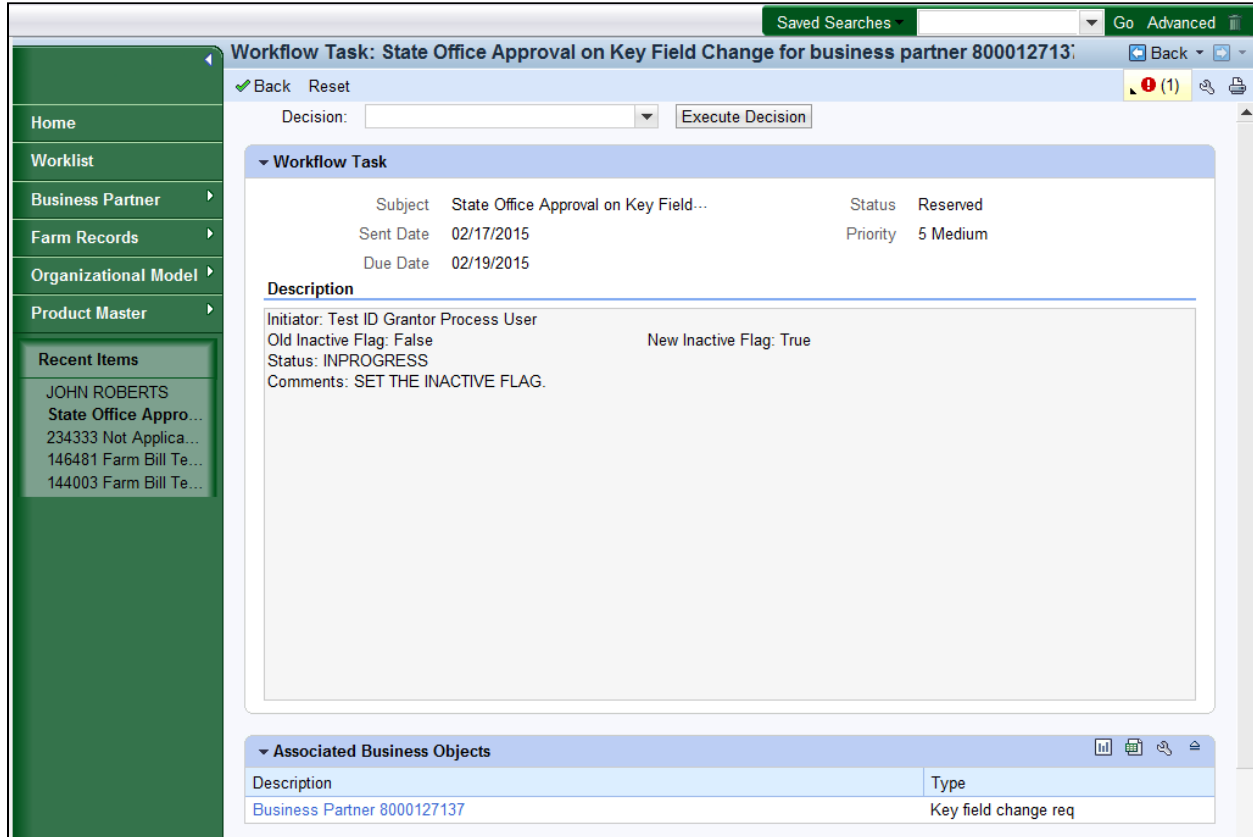
Initiator: Test ID Grantor Process User
 Old Inactive Flag: False
 Status: INPROGRESS
 Comments: SET THE INACTIVE FLAG.
 New Inactive Flag: True

Associated Business Objects

| Description | Type |
|-----------------------------|----------------------|
| Business Partner 8000127137 | Key field change req |

- Click the **Collapse message**  label to close the error message window.
 -  When the SSO selects the **Execute Decision** button when the **Decision:** value is blank, the user will receive a "Decision of blank is not valid." Please Approve or Reject the KFC request." error message.
 -  If the KFC request should be approved, please navigate to the **Associated Business Objects** tab to process the Inactivation.

Workflow Task: State Office Approval on Key Field Change for business partner 8000127137



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 8000127137'. On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items (listing JOHN ROBERTS and three other items). The main content area has a 'Decision:' dropdown and an 'Execute Decision' button. Below this is a 'Workflow Task' section with a table:

| Subject | Status |
|---------------------------------------|----------|
| State Office Approval on Key Field... | Reserved |

Additional details for the task:

- Sent Date: 02/17/2015
- Priority: 5 Medium
- Due Date: 02/19/2015



The 'Description' section contains the following text:

```
Initiator: Test ID Grantor Process User
Old Inactive Flag: False
Status: INPROGRESS
Comments: SET THE INACTIVE FLAG.
New Inactive Flag: True
```

At the bottom, the 'Associated Business Objects' section shows a table:

| Description | Type |
|-----------------------------|----------------------|
| Business Partner 8000127137 | Key field change req |

7. Scroll down to the **Associated Business Object** tab.

-  When a KFC request is received that request, to set the Inactive flag, the SSO must manually update the BP record.
-  If the request is not valid, then the SSO can reject the request by selecting the **Reject** value in the **Decision** field and then click the **Execute Decision** button. The **Execute Decision** will clear the workflow the the SSO's Worklist and the Associated Counties receive an alert which indicates that the KFC was rejected by the SSO.



Workflow Task: State Office Approval on Key Field Change for business partner 8000127137

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 displays the task details:

- Task Title:** Workflow Task: State Office Approval on Key Field Change for business partner 8000127137
- Buttons:** Back, Reset
- Metadata:** Sent Date: 02/17/2015, Due Date: 02/19/2015, Priority: 5 Medium
- Description:**
 - Initiator: Test ID Grantor Process User
 - Old Inactive Flag: False, New Inactive Flag: True
 - Status: INPROGRESS
 - Comments: SET THE INACTIVE FLAG.
- Associated Business Objects:**

| Description | Type |
|---|----------------------|
| Business Partner 8000127137 | Key field change req |
- Attachments:** No result found
- Recipients:** (Section header visible)

- Click the **Business Partner 8000127137** [Business Partner 8000127137](#) link to open the BP record.

Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet

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: 8000127137 | Address Lin... 1 WINNING DR |
| Prefix: | Example: Street address, PO BOX XXX, RR... |
| First Name: JOHN | Address Lin... |
| Middle Name: | Example: Apartment, Suite, Unit, Building, Fl... |
| Last Name: ROBERTS | City: OWINGS MILLS |
| Suffix: | State: MD MARYLAND |
| Common Customer.. JOHN ROBERTS | ZIP Code: 21117-4776 |
| Legal Name: No | Country: US USA |
| Language Preference: English | Telephone. |
| Data Origin: CRM | Mobile Num... |
| Employee Type: Not an employee | E-Mail Addr... |
| Tax ID Type: No Tax Iden... | Preferred C.. Post (letter) |
| Tax ID Number: No Tax ID... | Carrier Route: R002 |
| Date of Death: | Delivery Bar... 013 |
| Death Confirmed: <input type="checkbox"/> | Congressio.. MARYLAND 07 |

Notes

9. Click the **Edit**  button to edit the Customer Record.



Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet

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

General Data | Main Address and Communication Data

| | | | |
|----------------------|--------------------------|------------------|---|
| Current Role: | Individual | Information: | |
| BP Number / ID: | 8000127137 | Address Lin...: | 1 WINNING DR |
| Prefix: | | Example: | Street address, PO BOX XXX, RR... |
| First Name*: | JOHN | Address Lin...: | |
| Middle Name: | | Example: | Apartment, Suite, Unit, Building, Fl... |
| Last Name*: | ROBERTS | City*: | OWINGS MILLS |
| Suffix: | | State*: | MD MARYLAND |
| Common Customer..: | JOHN ROBERTS | ZIP Code*: | 21117-4776 |
| Legal Name*: | Ni | Country*: | US USA |
| Language Preference: | English | Telephone: | |
| Data Origin: | CRM | Mobile Num...: | |
| Employee Type: | Not an employee | E-Mail Addr...: | |
| Tax ID Type*: | No Tax Idé | Preferred C...: | Post (lette |
| Tax ID Number: | No Tax ID Nui | Carrier Route: | R002 |
| Date of Death: | | Delivery Bar...: | 013 |
| Death Confirmed: | <input type="checkbox"/> | Congressio...: | MARYLAND 07 |

Notes

10. Scroll down to the **Control Flags** tab to manually set the **Inactive** flag for the BP record.

Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet

Control Flags | Common Eligibility | Financial Service

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"/> | 02/17/2015 | 12/31/9999 |

Representative Capacity | Relationships

New | History Data

No result found

Program Participation* | Associated Counties

Edit


| Act... | Customer Type | Servicin... | Organization Description | General Program l... | Current Participant |
|--------|---------------|-------------|------------------------------|------------------------|-----------------------|
| | FSA CUSTOMER | 62623 | BALTIMORE COUNTY FARM SER... | Has interest in the... | Currently enrolled... |

Attachments | Change History

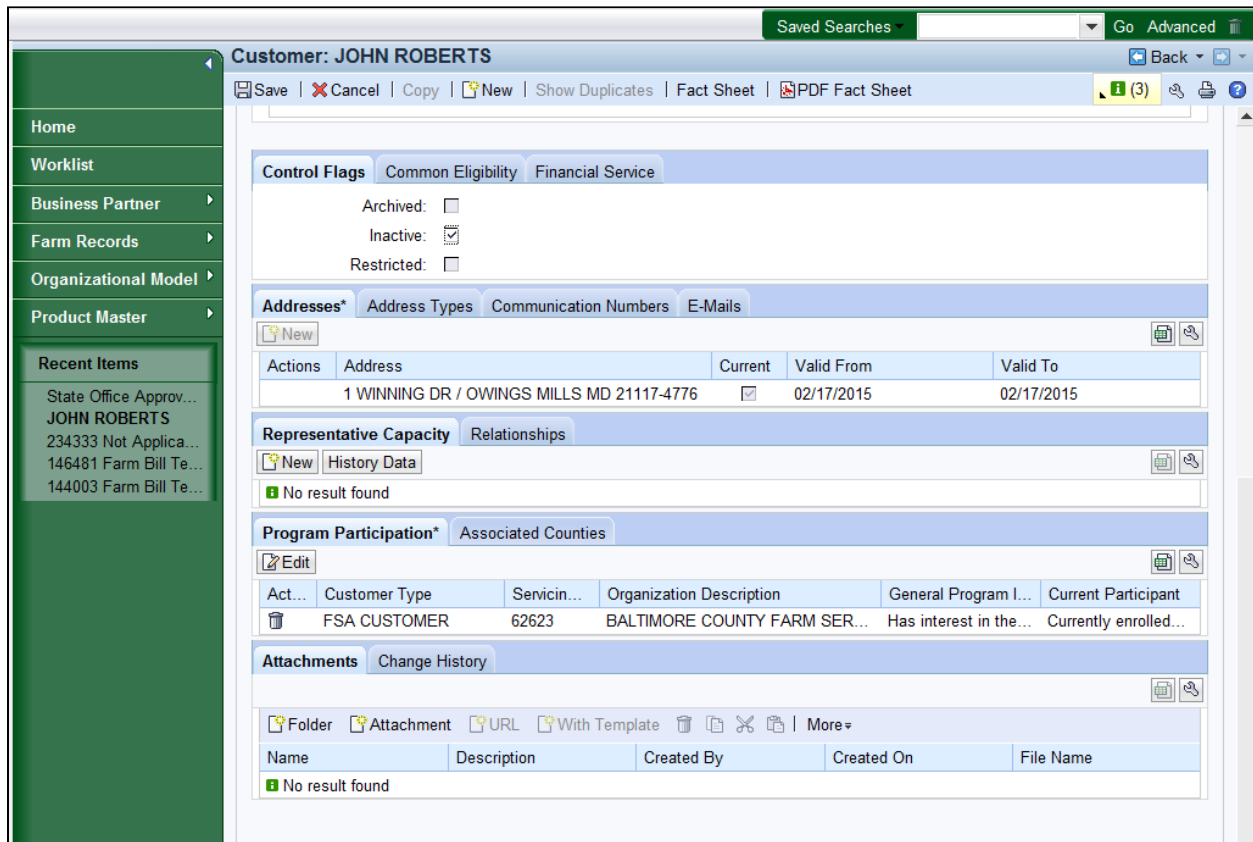
Folder | Attachment | URL | With Template | | | | More ▾

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

11. Select the **Inactive:** check box to activate the checkbox.

 The **Inactive** flag is an indicator used to determine if the status of the customer is active or inactive.

Customer: JOHN ROBERTS



Customer: JOHN ROBERTS

Control Flags Common Eligibility Financial Service

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"/> | 02/17/2015 | 02/17/2015 |

Representative Capacity Relationships

New History Data

No result found

Program Participation* Associated Counties

Edit

| Act... | Customer Type | Servic... | Organization Description | General Program l... | Current Participant |
|--------|---------------|-----------|------------------------------|------------------------|-----------------------|
| | FSA CUSTOMER | 62623 | BALTIMORE COUNTY FARM SER... | Has interest in the... | Currently enrolled... |

Attachments Change History

Folder Attachment URL With Template More ▾

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

12. Click the **Associated Counties** **Associated Counties** tab.



All active Associated Counties must be deleted from the BP record before it can be inactivated.

Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

Control Flags Common Eligibility Financial Service

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"/> | 02/17/2015 | 02/17/2015 |

Representative Capacity Relationships

[New](#) [History Data](#)

No result found

Program Participation* **Associated Counties**


[Edit](#)

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

At [Delete](#) [Change History](#)

[Folder](#) [Attachment](#) [URL](#) [With Template](#) [More](#)

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

13. Click the **Delete**  button to remove all Associated County(ies) from the BP record.

Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet

Control Flags | Common Eligibility | Financial Service

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"/> | 02/17/2015 | 02/17/2015 |

Representative Capacity | Relationships

New | History Data

No result found

Program Participation* | Associated Counties

Edit

Insert

| Ac... | Address | State | County |
|-----------------|---------|-------|--------|
| No result found | | | |

Attachments | Change History

Folder | Attachment | URL | With Template | More

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

14. Click the **Program Participation*** **Program Participation*** tab.

Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

Control Flags Common Eligibility Financial Service

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"/> | 02/17/2015 | 02/17/2015 |

Representative Capacity Relationships

[New](#) [History Data](#)

No result found

Program Participation* Associated Counties


[Edit](#)

| Act... | Customer Type | Servicin... | Organization Description | General Program I... | Current Participant |
|--------|---------------|-------------|------------------------------|------------------------|-----------------------|
| | FSA CUSTOMER | 62623 | BALTIMORE COUNTY FARM SER... | Has interest in the... | Currently enrolled... |

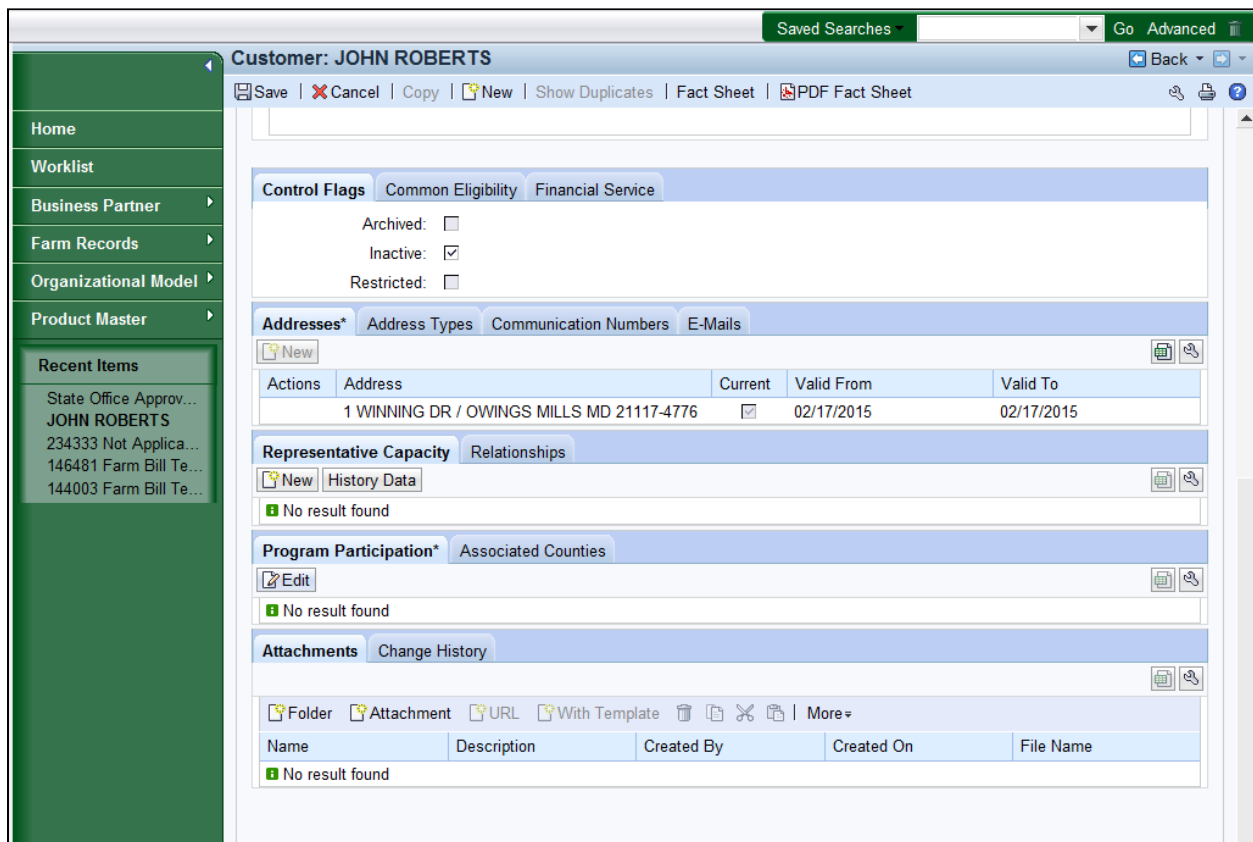
Attachments Change History

[Folder](#) [Attachment](#) [URL](#) [With Template](#) [More](#)

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

15. Click the **Delete**  button to delete the Program Participation and to remove the current FSA Customer type participation from the BP record.

Customer: JOHN ROBERTS



Customer: JOHN ROBERTS

Control Flags Common Eligibility Financial Service

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"/> | 02/17/2015 | 02/17/2015 |

Representative Capacity Relationships

New History Data

No result found

Program Participation* Associated Counties

Edit


No result found

Attachments Change History

Folder Attachment URL With Template More

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

16. Click the **Edit**  to edit the Program Participation assignment block.

 Once all Program Participation has been removed from the Program Participation block then the SSO needs to verify that the FSA Inactive program type was set. Since, the **Inactive Flag** was selected, the Program Participation should default to **Inactive Customer**.

Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet

Control Flags | Common Eligibility | Financial Service

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"/> | 02/17/2015 | 02/17/2015 |

Representative Capacity | Relationships

New | History Data

No result found

Program Participation* | Associated Counties


Edit


| Ac... | Customer Type | Servic... | Organization Description | General Program... | Current Participant |
|--------------------------|-------------------|--------------------------|--------------------------|-----------------------|------------------------|
| <input type="checkbox"/> | INACTIVE CUSTOMEI | <input type="checkbox"/> | | Does not have inte... | Not currently parti... |

Attachments | Change History | Open Input Help

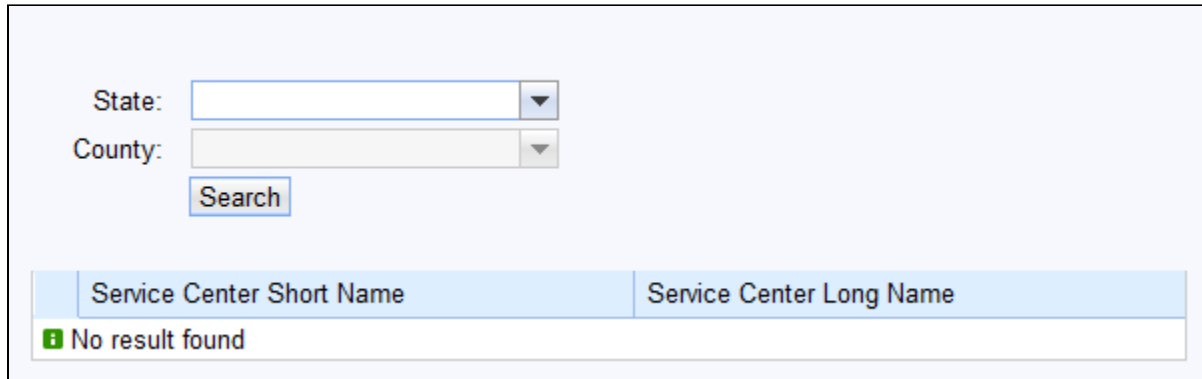
Folder | Attachment | URL | With Template | More

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

17. Click the **Servicing Organization** field  Open Input Help button to open the Service Center Search window.

 When the Inactive Customer value defaulted for Customer Type, the **General Program Interest** and **Current Participant** fields autopopulated but the Servicing Organization still needs to be assigned to this BP record.

Service Center Search



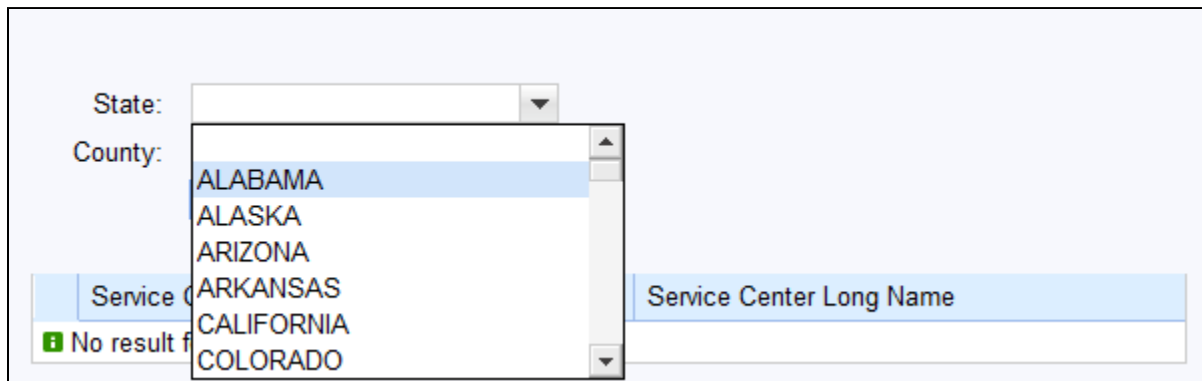
State:

County:

| Service Center Short Name | Service Center Long Name |
|---------------------------|--------------------------|
| No result found | |

18. Click the **State:** dropdown list icon to view the available options.

Service Center Search



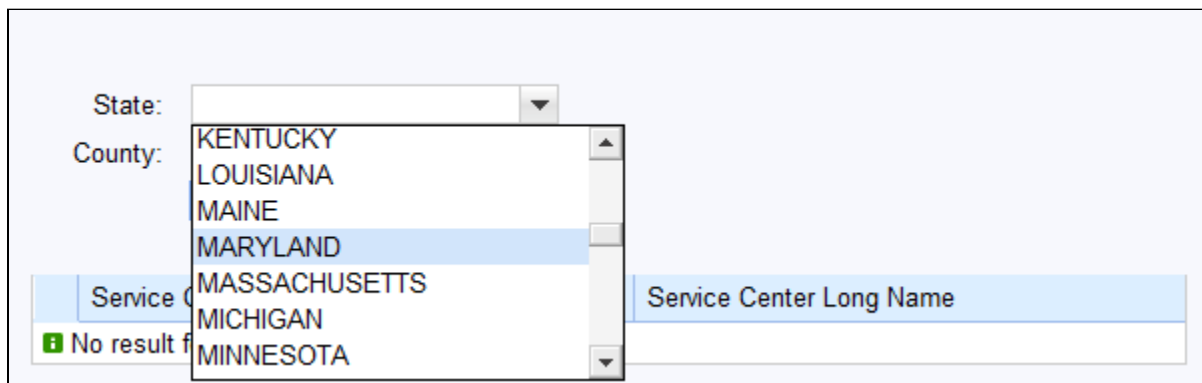
State:

County:

| Service Center Short Name | Service Center Long Name |
|---------------------------|--------------------------|
| No result found | |

19. Click the down-arrow to scroll through the list to locate your State selection.

Service Center Search



State:

County:

| Service Center Short Name | Service Center Long Name |
|---------------------------|--------------------------|
| No result found | |

20. Select **MARYLAND** from the State list.



Service Center Search

State: ▼

County: ▼

| Service Center Short Name | Service Center Long Name |
|---------------------------|--------------------------|
| No result found | |

21. Select **County:** ▼ dropdown list icon to view the available options.

Service Center Search

State: ▼

County: ▼

| Service Center Short Name | Service Center Long Name |
|---------------------------|--------------------------|
| No result found | |

ALLEGANY

BALTIMORE

BALTIMORE CITY

CALVERT

CAROLINE

22. Select **BALTIMORE** BALTIMORE from the County list.

Service Center Search

State: ▼

County: ▼

| Service Center Short Name | Service Center Long Name |
|---------------------------|------------------------------------|
| BALTIMORE CO, MD - FSA | BALTIMORE COUNTY FARM SERVICE A... |

23. Click **BALTIMORE CO, MD - FSA** BALTIMORE CO, MD - FSA to



select the value for the Servicing Organization.

Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

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 checked="" type="checkbox"/> | 02/17/2015 | 02/17/2015 |
|--|---|-------------------------------------|------------|------------|

Representative Capacity Relationships

Program Participation* Associated Counties

Insert

| Ac... | Customer Type | Servicin... | Organization Description | General Program... | Current Participant |
|--------------------------|-------------------|-------------|-----------------------------|-----------------------|------------------------|
| <input type="checkbox"/> | INACTIVE CUSTOMER | 62623 | BALTIMORE COUNTY FARM SE... | Does not have inte... | Not currently parti... |

Attachments Change History

| Name | Description | Created By | Created On | File Name |
|-----------------|-------------|------------|------------|-----------|
| No result found | | | | |

24. Scroll to the top of the Customer Details page.



Customer: JOHN ROBERTS

Customer: JOHN ROBERTS

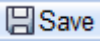
Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet

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

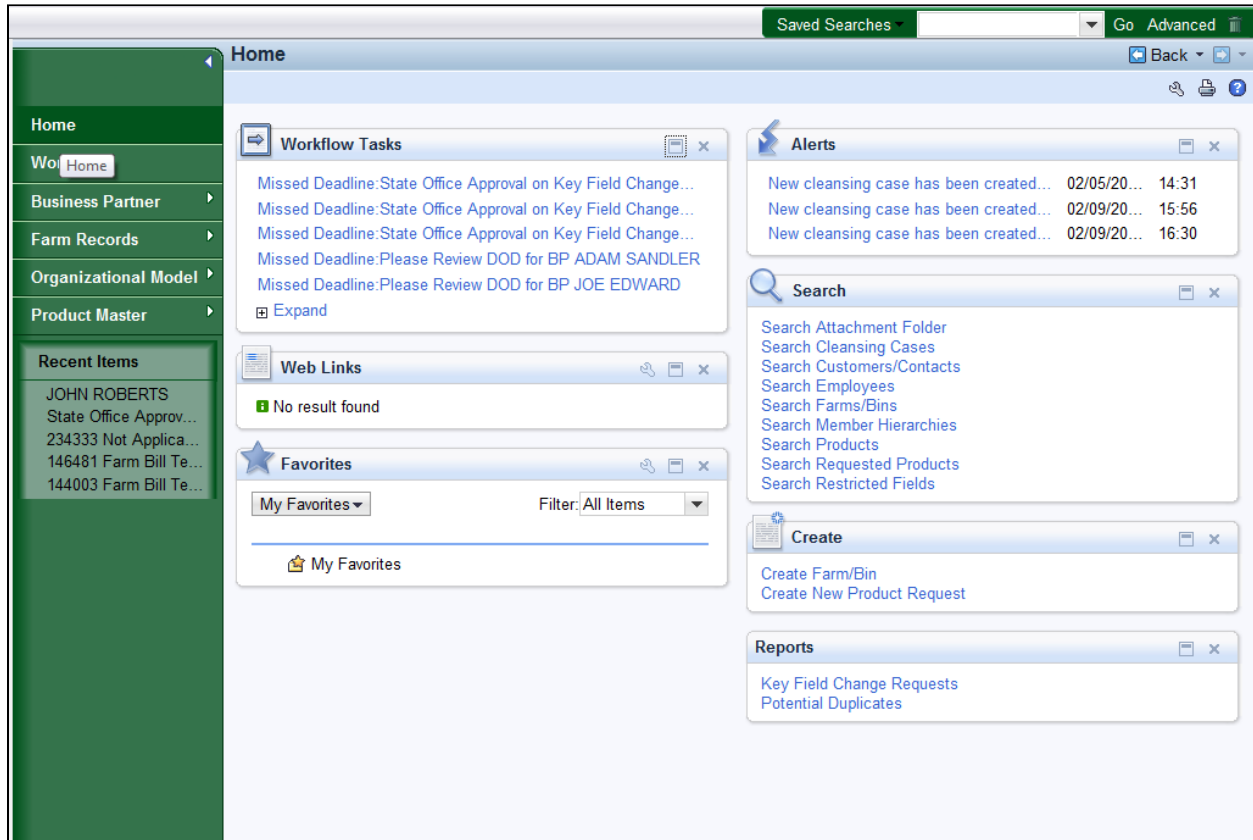
General Data | Main Address and Communication Data

| | | | |
|----------------------|--------------------------|-----------------|--|
| Current Role: | Individual | Information.. | |
| BP Number / ID: | 8000127137 | Address Lin... | 1 WINNING DR |
| Prefix: | | | Example: Street address, PO BOX XXX, RR... |
| First Name:* | JOHN | Address Lin... | |
| Middle Name: | | | Example: Apartment, Suite, Unit, Building, Fl... |
| Last Name:* | ROBERTS | City: | OWINGS MILLS |
| Suffix: | | State: | MD MARYLAND |
| Common Customer.. | JOHN ROBERTS | ZIP Code: | 21117-4776 |
| Legal Name:* | None | Country: | US USA |
| Language Preference: | English | Telephone. | |
| Data Origin: | CRM | Mobile Num... | |
| Employee Type: | Not an employee | E-Mail Addr... | |
| Tax ID Type:* | No Tax Id | Preferred C.. | Post (letter) |
| Tax ID Number: | No Tax ID Num | Carrier Route: | R002 |
| Date of Death: | | Delivery Bar... | 013 |
| Death Confirmed: | <input type="checkbox"/> | Congressio.. | MARYLAND 07 |

Notes

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


Home




The screenshot shows the MIDAS Home dashboard. On the left is a green sidebar with navigation links: Home, Workflow, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items. The main area is titled 'Home' and contains several widgets:

- Workflow Tasks:** A list of missed deadlines, including 'Missed Deadline: State Office Approval on Key Field Change...' and 'Missed Deadline: Please Review DOD for BP ADAM SANDLER'.
- Web Links:** A section with 'No result found'.
- Favorites:** A section with a 'My Favorites' button and a filter set to 'All Items'.
- Alerts:** A table showing new cleansing cases with dates and times.
- Search:** A search bar with various search filters like 'Search Attachment Folder', 'Search Cleansing Cases', etc.
- Create:** A section with buttons for 'Create Farm/Bin' and 'Create New Product Request'.
- Reports:** A section with links for 'Key Field Change Requests' and 'Potential Duplicates'.

26. Click the **Home**  button to return to the Main page.

 If the SSO had rejected the KFC request, then the work item would have been discharged and removed from all State Specialists worklists and an alert message would have been sent to all Associated Counties.

 The SSO has manually changed the BP record by setting the Inactive flag. The work items have been discharged and removed from all of the State Specialist's worklists and alerts are not sent to the Associated Counties. The SSO should send an email to at least the user that initiated the inactivation.



Result

You have manually set the Inactive Flag from the KFC Request form.