

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 <u>177B</u> 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 | À | 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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| | | Reports Key Field Change Requests Potential Duplicates | x |

2. Click the Worklist Worklist notification that the SSO received.

button to view the Workflow Task

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

| Worklist Back Home Image: Alerts Worklist Due Due Description Sent Date Expiration Date |
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| Home Image: Alerts Worklist Due Description Sent Date Expiration Date Priority |
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| Worklist Due Description Sent Date Expiration Date Priori |
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| Product Master Due Subject Sent Due D Priority Associated B Process Sub P |
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3. 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.



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| Farm Records | | Sent Date | 02/17/2015 | | | | Priority | 5 Medium | | | | |
| Organizational Model 🕨 | Description | Due Date | 02/19/2015 | | | | | | | | | |
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| Recent Items | Old Inactive Status: INPF | Flag: False | | Nev | v Inactive Flag | g: True | | | | | | |
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4. Click the **Execute Decision** Execute Decision button to approve the KFC request.



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



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6. 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.



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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.



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8. Click the **Business Partner 8000127137** Business Partner 8000127137 link to open the BP record.



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| Product Master | Prefix: | | | | Example: Stree | et address, PO BOX XXX, RR | |
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| Recent Items | Middle Name: | | | | Example: Apar | tment, Suite, Unit, Building, FI | |
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| JOHN ROBERTS | Suffix: | | | State: | MD | MARYLAND | |
| 146481 Farm Bill Te | Common Customer | JOHN ROBERTS | : | ZIP Code: | 21117-4776 | | |
| 144003 Farm Bill Te | Legal Name: | No | | Country: | US | USA | |
| | Language Preference: | English | Tel | ephone. | | | |
| | Data Origin: | CRM | Mobi | ile Num | | | |
| | Employee Type: | Not an employee | E-M | ail Addr | | | |
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9. Click the Edit Edit button to edit the Customer Record.



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| Product Master | Prefix: | • | | | Example: Stre | et address, PO B | OX XXX, RR | |
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| Recent Items | Middle Name: | | | | Example: Apa | rtment, Suite, Uni | it, Building, Fl… | |
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| JOHN ROBERTS | Suffix: | • | | State:* | MD 🗇 | MARYLAND | | |
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| 144003 Farm Bill Te | Legal Name:* | N 🖛 | | 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 Ide 🔻 | | Preferred C | Post (lette 🔻 | | | |
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10. Scroll down to the **Control Flags** tab to manually set the **Inactive** flag for the BP record.



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11. Select the **Inactive**: \Box 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.



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12. Click the Associated Counties Associated Counties tab.

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



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



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



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



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- **16.** Click the Edit redit 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**.



| | | | | Saved Sear | ches - | - G | o Advanced | Î |
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| C | ustomer: JOHN ROBE | RTS | | | | | 🖸 Back 🝷 | • |
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| | No result found | | | | | | | |

17. Click the Servicing Organization field <a>D 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: Search | • | | |
|-----------------------------|-----|--------------------------|--|
| Service Center Short Na | ime | Service Center Long Name | |
| No result found | | | |

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

Service Center Search

| | State: | | • | |
|---|-------------|------------------------|----------|--------------------------|
| C | County: | | ^ | |
| | | ALASKA ARIZONA | | |
| | Service (| ARKANSAS CALIFORNIA | | Service Center Long Name |
| | to result t | COLORADO | - | |

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

Service Center Search



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



Service Center Search

| State: County: | MARYLAND | • | | |
|-------------------|-------------------|---|--------------------------|--|
| 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 | : MARYLAND | - | | |
|-----------|-------------------|----------|--------------------------|--|
| County | r: | • | | |
| | | A | | |
| | ALLEGANY | | | |
| | BALTIMORE | | | |
| Servio | Ce BALTIMORE CITY | | Service Center Long Name | |
| B No resi | ult fCALVERT | | | |
| | CAROLINE | - | | |

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

Service Center Search

| State: | MARYLAND | - | |
|---------|-------------------|---|---------------------------------|
| County: | BALTIMORE | - | |
| | Search | | |
| Service | Center Short Name | | Service Center Long Name |
| | AORE CO. MD. ESA | | BALTIMODE COUNTY FADM SEDVICE A |

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



select the value for the Servicing Organization.

Customer: JOHN ROBERTS

| | | | | Saved Searches | - | Go Advanced 湔 |
|--|---|-------------------------|------------------------|-----------------|-----------------------|---------------|
| | Customer: JOHN ROBE | RTS | | | | 🖸 Back 👻 🖸 👻 |
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| Home | | | | | | |
| Worklist | | | | | | |
| Business Partner | Control Flags Common | Eligibility Financial S | ervice | | | |
| | Archived: | | | | | |
| Farm Records | Inactive: | \checkmark | | | | |
| Organizational Model 🕨 | Restricted: | | | | | |
| Product Master | Addresses* Address Ty | pes Communication N | lumbers E-Mails | | | |
| Pocont Itoms | New | | | | | a |
| State Office Arrest | Actions Address | | Current | Valid From | Valid To | |
| JOHN ROBERTS | 1 WINNING DR / OWINGS MILLS MD 21117-4776 🛛 02/17/2015 02/17/2015 | | | | | |
| 234333 Not Applica | Representative Capacity | Relationships | | | | |
| 146481 Farm Bill Te 144003 Farm Bill Te | PNew History Data | | | | | a |
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| | Program Participation* | Associated Counties | | | | |
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| | Insert | | | | | |
| | Ac Customer Typ | servicin | Organization Descripti | on General | Program Current F | Participant |
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| | Name | Description | Created By | Created On | File Name | |
| | No result found | | | | | |

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



| | | | | Saved Se | arches - | Go Advance | d 🗎 |
|------------------------|------------------------|---------------------|--------------------|----------------|-------------------|------------------------------------|--------------|
| | Customer: JOHN ROB | ERTS | | | | 🔄 Back 🔻 | • |
| | Save X Cancel Copy | 📴 New Show Du | plicates Fact Sh | neet 😹 PDF F | act Sheet | 1 E | } (?) |
| Home | | | | | | | |
| Worklist | Customer Details Cus | tomer Profile Roles | Identification Num | bers SCIMS F | Replication Statu | IS | |
| Ductors Destroy | Edit STax ID Histor | Y | | | | | |
| Business Partner | General Data | | | Main Addres | s and Commun | ication Data | |
| Farm Records | Current Role: | Individual | - | Information. | | | |
| Organizational Model 🕨 | BP Number / ID: | 8000127137 | | Address Lin | 1 WINNING D | R | |
| Product Master | Prefix: | • | | | Example: Stre | eet address, PO BOX XXX, RR | |
| | First Name:* | JOHN | | Address Lin | | | |
| Recent Items | Middle Name: | | | | Example: Apa | artment, Suite, Unit, Building, Fl | |
| State Office Approv | Last Name:* | ROBERTS | | City: | OWINGS MIL | LS | |
| JOHN ROBERTS | Suffix: | • | | State: | MD | MARYLAND | |
| 146481 Farm Bill Te | Common Customer | JOHN ROBERTS | | ZIP Code: | 21117-4776 | | |
| 144003 Farm Bill Te | Legal Name:* | N: 🔻 | | Country: | US | USA | |
| | Language Preference: | English 💌 | | Telephone. | | | |
| | Data Origin: | CRM | T | Mobile Num | | | |
| | Employee Type: | Not an employee | Ŧ | E-Mail Addr | | | |
| | Tax ID Type:* | No Tax Ide 💌 | | Preferred C | Post (letter) | | |
| | Tax ID Number: | No Tax ID Nu | | Carrier Route: | R002 | | |
| | Date of Death: | 62 | | Delivery Bar | 013 | | |
| | Death Confirmed: | | | Congressio | MARYLAND | 07 | |
| | Notes | | | | | | |
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25. Click the **Save** button to record the changes to the BP record.



Home

| Home Home Home WolfHome Business Partner Business Partner Farm Records Organizational Model Product Master Recent Items JOHN ROBERTS State Office Approv State Office Approv 234333 Not Aonlica |
|--|
| Home Wol Home Business Partner Business Partner Farm Records Organizational Model Product Master Recent Items JOHN ROBERTS State Office Approv State Office Approv 234333 Nit Applica |
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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.

Home

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.