

## Purpose

The purpose of this work instruction is to show how to create a Conservatorship.

## Trigger

Perform this procedure when requested by a customer.

## Prerequisites

- The customer records for both the individual having the conservatorship and the person(s) who will be the conservator must be in Business Partner.

## 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 .

### Accounts

3. Click **Search Customers/Contacts** label [Search Customers/Contacts](#) to go to the



Search:Customers page.

### Search: Customers

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

| Field      | R/O/C | Description   |
|------------|-------|---|
| First Name | R     | Business Partner's First Name<br><b>Example:</b><br>Betty |
| Last Name  | R     | Business Partner's Last Name<br><b>Example:</b><br>Elsner |





## Customer: BETTY O ELSNER

Customer: BETTY O ELSNER

Save | Cancel | Fact Sheet | PDF Fact Sheet | More

Customer Details | Customer Profile | Roles | Identification Numbers

General Data | Main Address and Communication Data

|                       |                  |                       |               |
|-----------------------|------------------|-----------------------|---------------|
| Current Role:         | Individual       | Information Line:     |               |
| BP Number / ID:       | 800001922        | Address Line:         | 6205 Main St. |
| Prefix:               |                  | PO Box:               |               |
| First Name:           | BETTY            | City:                 | UNION BRIDGE  |
| Middle Name:          | O                | State:                | MD Maryland   |
| Last Name:            | ELSNER           | ZIP Code:             | 21791-7900    |
| Suffix:               |                  | Country:              | US USA        |
| Last Name at Birth:   |                  | Telephone Number:     |               |
| Legal Name:           | No               | E-Mail Address:       |               |
| Common Customer Name: | BETTY O ELSNER   | Communication Method: | Post (letter) |
| Language Preference:  | English          |                       |               |
| Data Origin:          | SCIMS            |                       |               |
| Employee Type:        | Not an employee  |                       |               |
| Tax ID Type:          | No Tax ID Type   |                       |               |
| Tax ID Number:        | No Tax ID Number |                       |               |

Notes

7. Scroll to the **Representative Capacity** tab.

## Customer: BETTY O ELSNER

Customer: BETTY O ELSNER

Save | Cancel | Fact Sheet | PDF Fact Sheet | More

Addresses | Address Types | Communication Numbers | E-Mails

Actions | Address | Current | Valid From | Valid To

|  |  |                                     |            |            |
|--|--|-------------------------------------|------------|------------|
|  | 6205 Main St. / UNION BRIDGE MD 21791-7900 | <input checked="" type="checkbox"/> | 09/19/2002 | 12/31/9999 |
|--|--|-------------------------------------|------------|------------|

Representative Capacity | Relationships

No result found

Program Participation | Associated Counties

Actions | Customer Type | Organization Name | General Program Interest | Current Participant

|  |              |                               |         |                             |
|--|--------------|-------------------------------|---------|-----------------------------|
|  | FSA CUSTOMER | FREDERICK COUNTY FARM SERV... | Unknown | Not currently participating |
|--|--------------|-------------------------------|---------|-----------------------------|

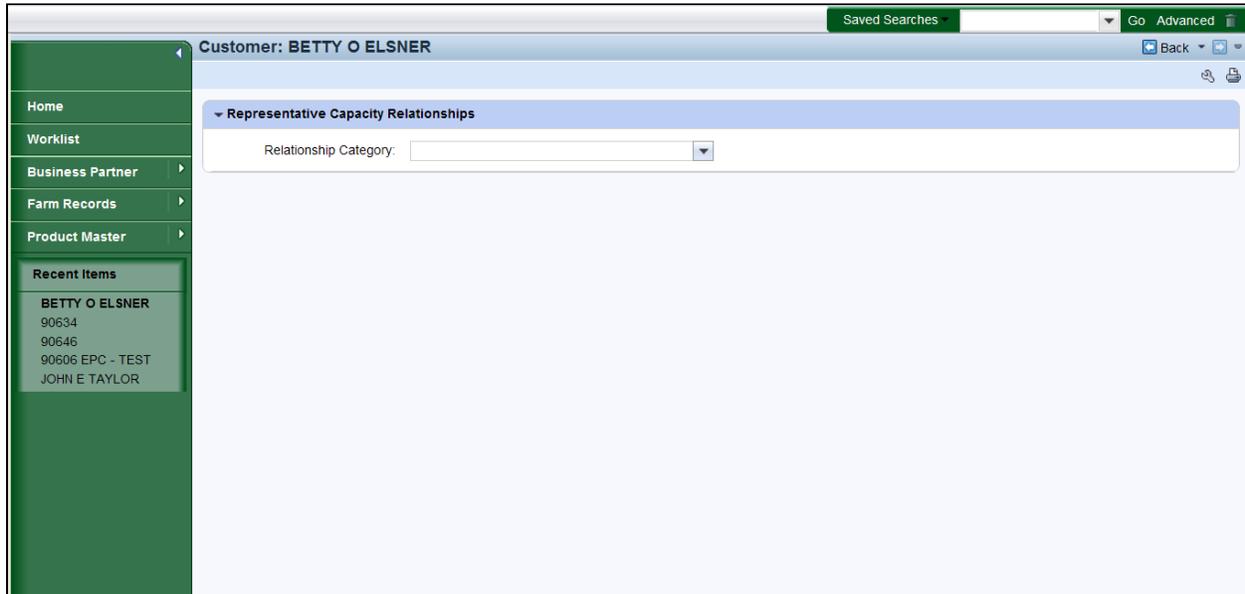
Attachments

No result found

Change History

8. Click the **New** button  for the **Representative Capacity** tab to go to the Customer Representative Capacity page.

## Customer: BETTY O ELSNER

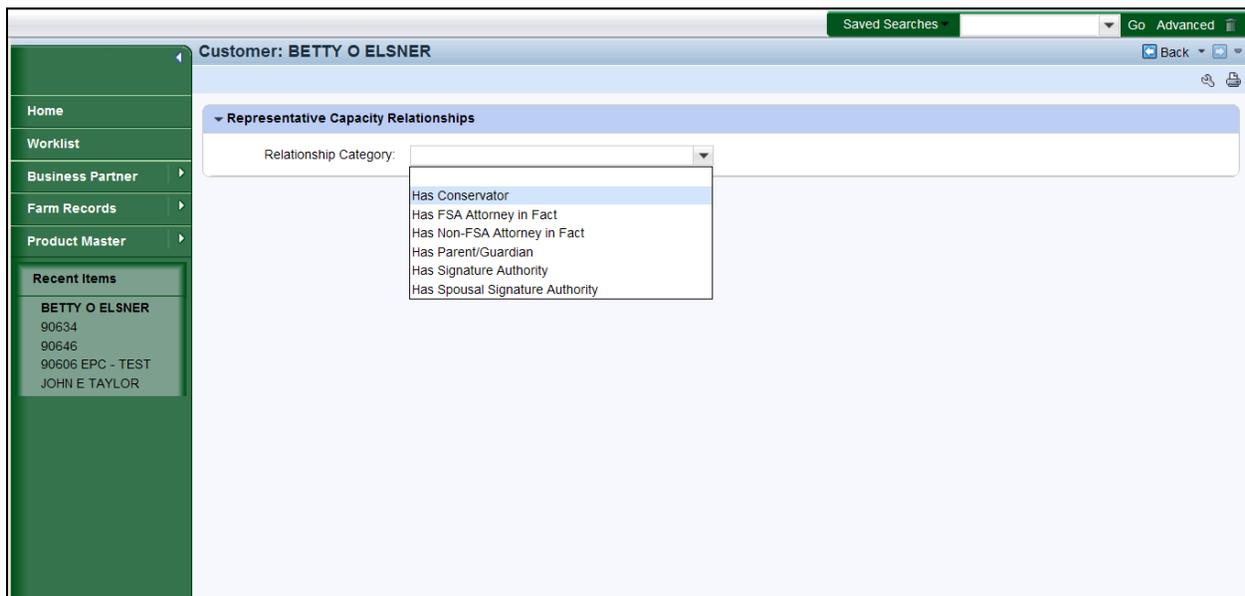


Customer: BETTY O ELSNER

Relationship Category:

- Click the **Relationship Category** dropdown icon  to display the list of Relationship Categories.

## Customer: BETTY O ELSNER



Customer: BETTY O ELSNER

Relationship Category:

- Has Conservator
- Has FSA Attorney in Fact
- Has Non-FSA Attorney in Fact
- Has Parent/Guardian
- Has Signature Authority
- Has Spousal Signature Authority

- Select **Has Conservator**  from the dropdown list for the Relationship Category.



## Customer: BETTY O ELSNER

11. Click the **New** button  to open the **Full Name** entry field.

## Customer: BETTY O ELSNER

12. Click the **Full Name** field Open Input Help button  to go to the Search Criteria window.



## Search Criteria

**Search Criteria**
[Hide Search Fields](#)

Search for:

|                      |   |    |   |                      |     |
|----------------------|---|----|---|----------------------|-----|
| Business Name        | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| First Name           | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| Last Name            | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| Middle Name          | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| Common Customer Name | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| BP Number/ID         | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| Role                 | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| Tax ID Type          | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| Tax ID Number        | ▼ | is | ▼ | <input type="text"/> | ⊗ ⊙ |
| Legacy State         | ▼ | is | ▼ | MARYLAND             | ⊗ ⊙ |
| Legacy County        | ▼ | is | ▼ | FREDERICK            | ⊗ ⊙ |
| Service Center       | ▼ | is | ▼ | ALL CENTERS          | ⊗ ⊙ |

Maximum Number of Results:

**Result List**

[New Customer](#) ⌂ 🔍

|         |            |                      |           |           |          |      |       |           |          |        |
|---------|------------|----------------------|-----------|-----------|----------|------|-------|-----------|----------|--------|
| Inac... | BP Numb... | Common Customer Name | Tax ID... | Tax ID... | Addre... | City | State | ZIP Co... | Telep... | E-Mail |
|---------|------------|----------------------|-----------|-----------|----------|------|-------|-----------|----------|--------|

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

| Field      | R/O/C | Description   |
|------------|-------|---|
| First Name | O     | Business Partner's First Name<br><b>Example:</b><br>Alice |
| Last Name  | O     | Business Partner's Last Name<br><b>Example:</b><br>Mason  |



## Search Criteria

**Search Criteria**
[Hide Search Fields](#)

Search for:

|                      |    |             |  |  |
|----------------------|----|-------------|--|--|
| Business Name        | is |             |  |  |
| First Name           | is | Alice       |  |  |
| Last Name            | is | Mason       |  |  |
| Middle Name          | is |             |  |  |
| Common Customer Name | is |             |  |  |
| BP Number/ID         | is |             |  |  |
| Role                 | is |             |  |  |
| Tax ID Type          | is |             |  |  |
| Tax ID Number        | is |             |  |  |
| Legacy State         | is | MARYLAND    |  |  |
| Legacy County        | is | FREDERICK   |  |  |
| Service Center       | is | ALL CENTERS |  |  |

Maximum Number of Results:

**Result List**

New Customer

| Inac... | BP Numb... | Common Customer Name | Tax ID... | Tax ID... | Addre... | City | State | ZIP Co... | Telep... | E-Mail |
|---------|------------|----------------------|-----------|-----------|----------|------|-------|-----------|----------|--------|
|---------|------------|----------------------|-----------|-----------|----------|------|-------|-----------|----------|--------|

14. Click the **Search** button .



## Search Criteria

**Search Criteria**
[Hide Search Fields](#)

Search for:

|                      |    |             |  |  |
|----------------------|----|-------------|--|--|
| Business Name        | is |             |  |  |
| First Name           | is | ALICE       |  |  |
| Last Name            | is | MASON       |  |  |
| Middle Name          | is |             |  |  |
| Common Customer Name | is |             |  |  |
| BP Number/ID         | is |             |  |  |
| Role                 | is |             |  |  |
| Tax ID Type          | is |             |  |  |
| Tax ID Number        | is |             |  |  |
| Legacy State         | is | MARYLAND    |  |  |
| Legacy County        | is | FREDERICK   |  |  |
| Service Center       | is | ALL CENTERS |  |  |

Maximum Number of Results:

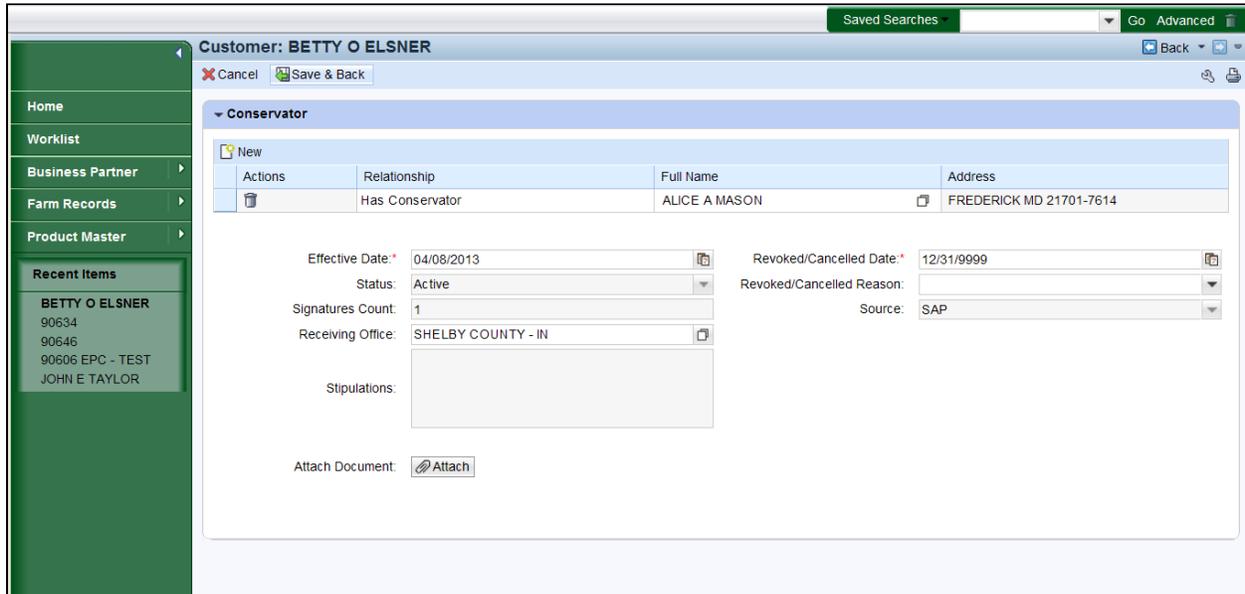
**Result List: 1 Customer Found**

[New Customer](#)

| Inac...                  | BP Numb... | Common Customer Name          | Tax ID... | Tax ID... | Addre... | City    | State    | ZIP Co... | Telep... | E-Mail |
|--------------------------|------------|-------------------------------|-----------|-----------|----------|---------|----------|-----------|----------|--------|
| <input type="checkbox"/> | 8000000... | <a href="#">ALICE A MASON</a> | NOTA...   | No Tax... | 2046...  | FRED... | Maryland | 21701...  |          |        |

- 15.** Select the **Common Customer Name** from the Result List (Alice A Mason) [ALICE A MASON](#) to go to the Customer Conservator page.

## Customer: BETTY O ELSNER



Customer: BETTY O ELSNER

Cancel Save & Back

Conservator

| Actions | Relationship    | Full Name     | Address                 |
|---------|-----------------|---------------|-------------------------|
|         | Has Conservator | ALICE A MASON | FREDERICK MD 21701-7614 |

Effective Date: 04/08/2013 Revoked/Cancelled Date: 12/31/9999

Status: Active Revoked/Cancelled Reason:

Signatures Count: 1 Source: SAP

Receiving Office: SHELBY COUNTY - IN

Stipulations:

Attach Document:

16. Click the **Save & Back** button .

 Additional customers may be added to the conservator by clicking the New button and repeating the previous search steps.

## Submit Conservatorship

Is all the data displayed complete and accurate? Active conservatorship data cannot be modified after it is submitted. It can only be revoked. In addition, all other representative capacity relationships for this incompetent individual will be automatically adjusted at this time; existing relationships with overlapping dates will be revoked and date delimited, and pending relationships with future dates will be completely deleted without history. Are you sure you wish to continue?

17. Click the **Yes** button  to accept the Conservatorship if all information is accurate and complete, and continue to the Customer Representative Capacity page .

 A Conservatorship will end all other Representative Capacity Relationships.



## Customer: BETTY O ELSNER

Customer: BETTY O ELSNER

Save | Cancel | Fact Sheet | PDF Fact Sheet | More »

Addresses | Address Types | Communication Numbers | E-Mails

| Actions | Address                                    | Current                             | Valid From | Valid To   |
|---------|--|-------------------------------------|------------|------------|
|         | 6205 MAIN ST. / UNION BRIDGE MD 21791-7900 | <input checked="" type="checkbox"/> | 09/19/2002 | 12/31/9999 |

Representative Capacity | Relationships

| Actions | Type            | Business Partner | Status | Effective Date | Revoked/Ca... |
|---------|-----------------|------------------|--------|----------------|---------------|
|         | Has Conservator | ALICE A MASON    | Active | 04/08/2013     | 12/31/9999    |

Program Participation | Associated Counties

| Actions | Customer Type | Organization Name              | General Program Interest | Current Participant         |
|---------|---------------|--------------------------------|--------------------------|-----------------------------|
|         | FSA CUSTOMER  | FREDERICK COUNTY FARM SERVI... | Unknown                  | Not currently participating |

Attachments

| Name            | Type | Created By | Created On |
|-----------------|------|------------|------------|
| No result found |      |            |            |

Change History

18. Click Home button  to go to the Home page.

 The Conservatorship is now Active. All other Representative Capacity Relationships have been ended.



## Result

You have created a Conservatorship.



## Next Steps