

Purpose

The purpose of this work instruction is to show the worklist approval process.

Trigger

Perform this procedure when approving Business Partner death verification tasks.

Prerequisites

- A Business Partner date of death workflow tasks must be on your worklist.

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-

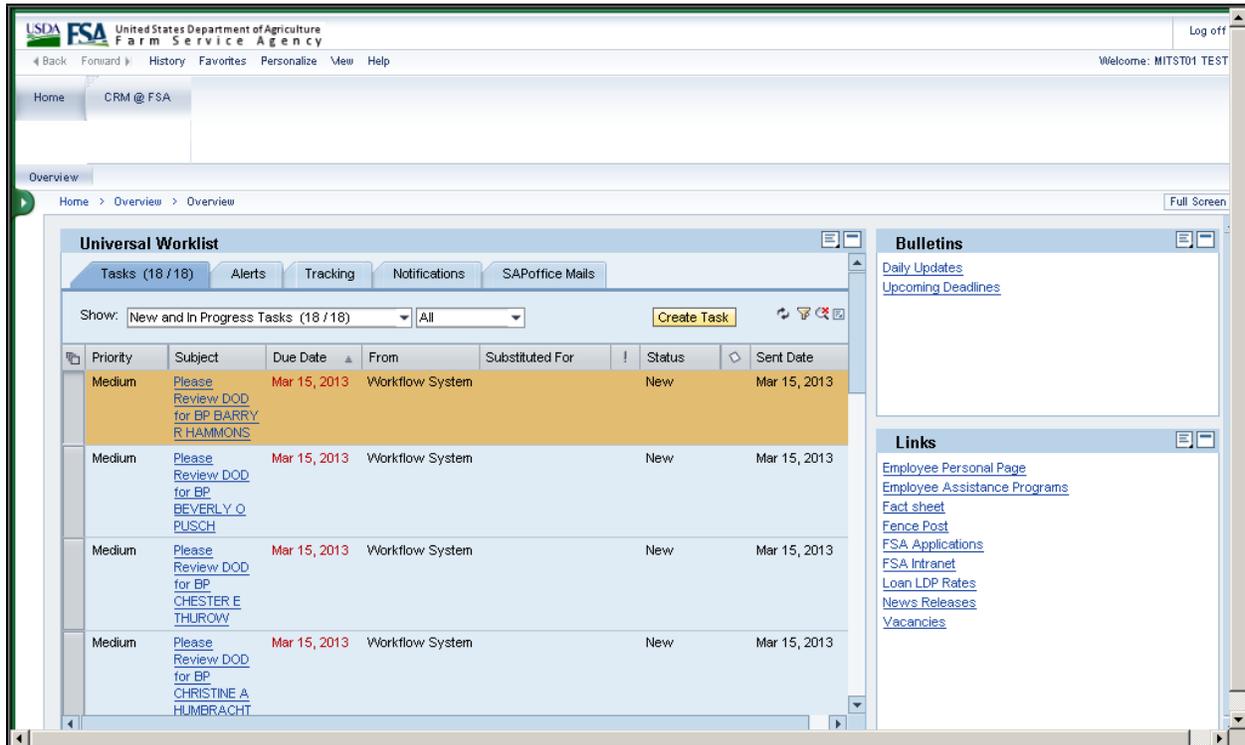


		<p>user the need to initiate a communication within the organization due to an event in the procedure.</p>
<p>A reference is available</p>		<p>Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.</p>

Procedure

1. {Start the transaction from the MIDAS Portal Home Page.}

Overview - Farm Service Agency - Windows Internet Explorer



The screenshot shows the 'Universal Worklist' interface. The table below represents the data shown in the worklist:

Priority	Subject	Due Date	From	Substituted For	Status	Sent Date
Medium	Please Review DOD for BP BARRY R HAMMONS	Mar 15, 2013	Workflow System		New	Mar 15, 2013
Medium	Please Review DOD for BP BEVERLY Q PUSCH	Mar 15, 2013	Workflow System		New	Mar 15, 2013
Medium	Please Review DOD for BP CHESTER E THUROW	Mar 15, 2013	Workflow System		New	Mar 15, 2013
Medium	Please Review DOD for BP CHRISTINE A HUMBRACHT	Mar 15, 2013	Workflow System		New	Mar 15, 2013

2. Click the [CRM@FSA](#) button 

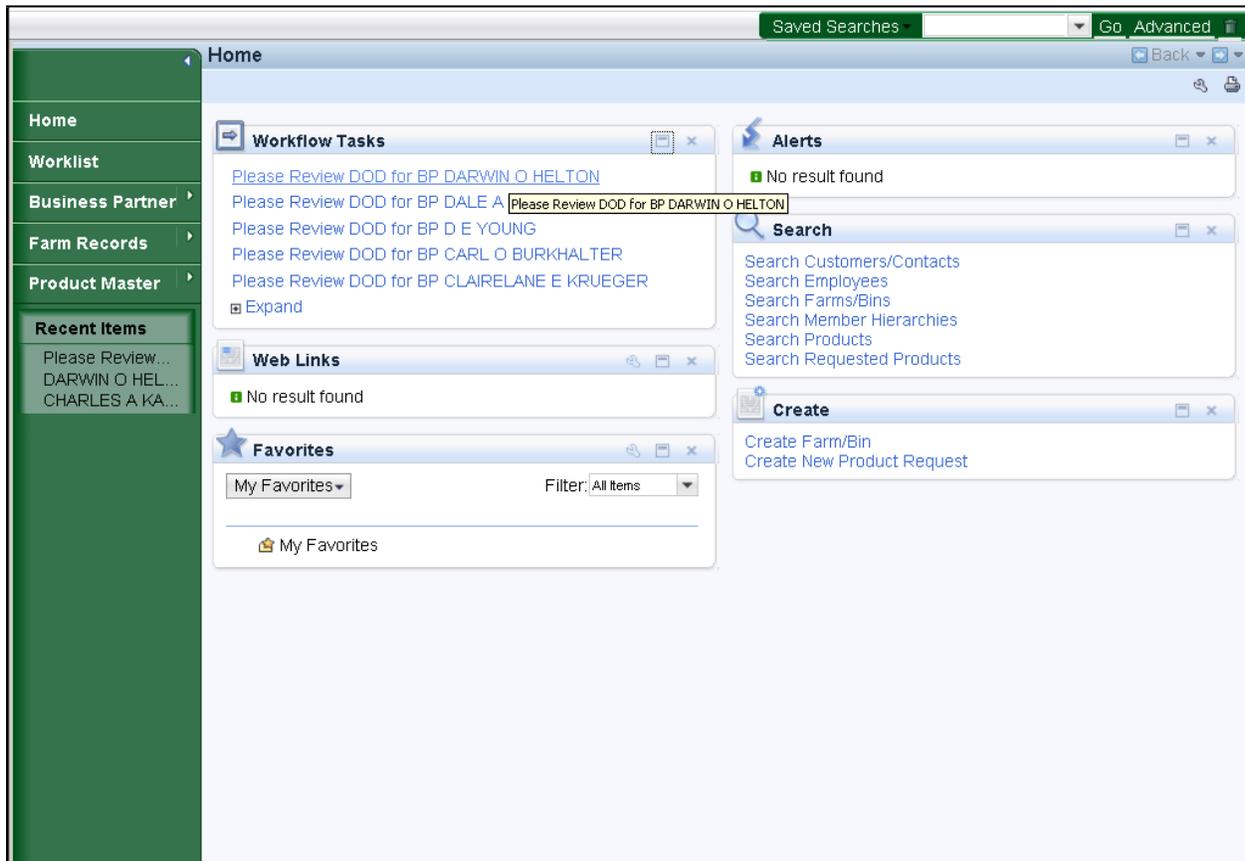
 Workflow tasks are available for review in the Portal UWL, but you must access CRM Worklist to review and complete them.



SAP - [Home] - Windows Internet Explorer

3. Click the Maximize button .

Home



The screenshot shows the CRM Home page with a sidebar on the left and a main content area. The sidebar includes links for Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area is divided into several sections:

- Workflow Tasks:** A list of tasks with links to review DOD for various business partners (BP DARWIN O HELTON, BP DALE A, BP D E YOUNG, BP CARL O BURKHALTER, BP CLAIRELANE E KRUEGER). An "Expand" button is visible.
- Alerts:** A section indicating "No result found".
- Search:** A search bar with a magnifying glass icon and a list of search options: Search Customers/Contacts, Search Employees, Search Farms/Bins, Search Member Hierarchies, Search Products, and Search Requested Products.
- Web Links:** A section indicating "No result found".
- Favorites:** A section with a "My Favorites" dropdown menu and a "Filter: All Items" dropdown menu. A "My Favorites" link is visible below.
- Create:** A section with two links: "Create Farm/Bin" and "Create New Product Request".

- Click Please Review DOD for BP DARWIN O HELTON link label

[Please Review DOD for BP DARWIN O HELTON](#)



Tasks can be processed from the CRM Homepage Workflow Tasks assignment block or the Worklist.



Home

The screenshot shows the MIDAS Home page. On the left is a green navigation sidebar with buttons for Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area is titled 'Home' and contains a 'Workflow Task' section. The task details are as follows:

Subject	Please Review DOD for BP DARWIN O HELTON	Status	Ready
Sent Date	03/15/2013	Priority	4 High
Due Date	03/15/2013		

Description

Producer DARWIN O HELTON has been identified as deceased by SSA, and the Date of Death has been entered as 01/01/2013 in the Customer Profile Assignment Block.

An employee is required to take action by researching and either accepting or declining the Customer's death. This task has been sent to all employees who are assigned to the Customer's associated counties.

If you would like to take responsibility for this work item and need more time to research and confirm the Customer's death, please go to the Attachments section and click the "Add Note" button. In the Note Description, indicate your name and county. For example: "Michael Smith from Montgomery County taking action". This will ensure that other counties and employees will be aware of your pending action.

When you are ready to execute a decision, choose one of the decision options from the dropdown box and then select Execute Decision:

ACCEPT will flag the Death Confirmed checkbox confirming that the Customer is deceased, and all representative capacity agreements for this customer will be revoked.

DECLINE will clear the Date of Death from the Customer Profile Assignment Block confirming that this Customer is NOT deceased.

If no decision is taken after 14 days, a notification will be escalated to all the applicable State offices. If no decision is taken after 28 days, a notification will be escalated to the National Office.

Associated Business Objects

Description	Type
8000000097-DARWIN O HELTON	Business Partner

Attachments New | Add Note

Actions	File Name	File Type	Type
	Death Certificate	Note	Office Document

5. Click the Back button to return to the Workflow Task list.
6. Click the Worklist button .



Worklist

Worklist

Alerts | Personalize Alerts

No result found

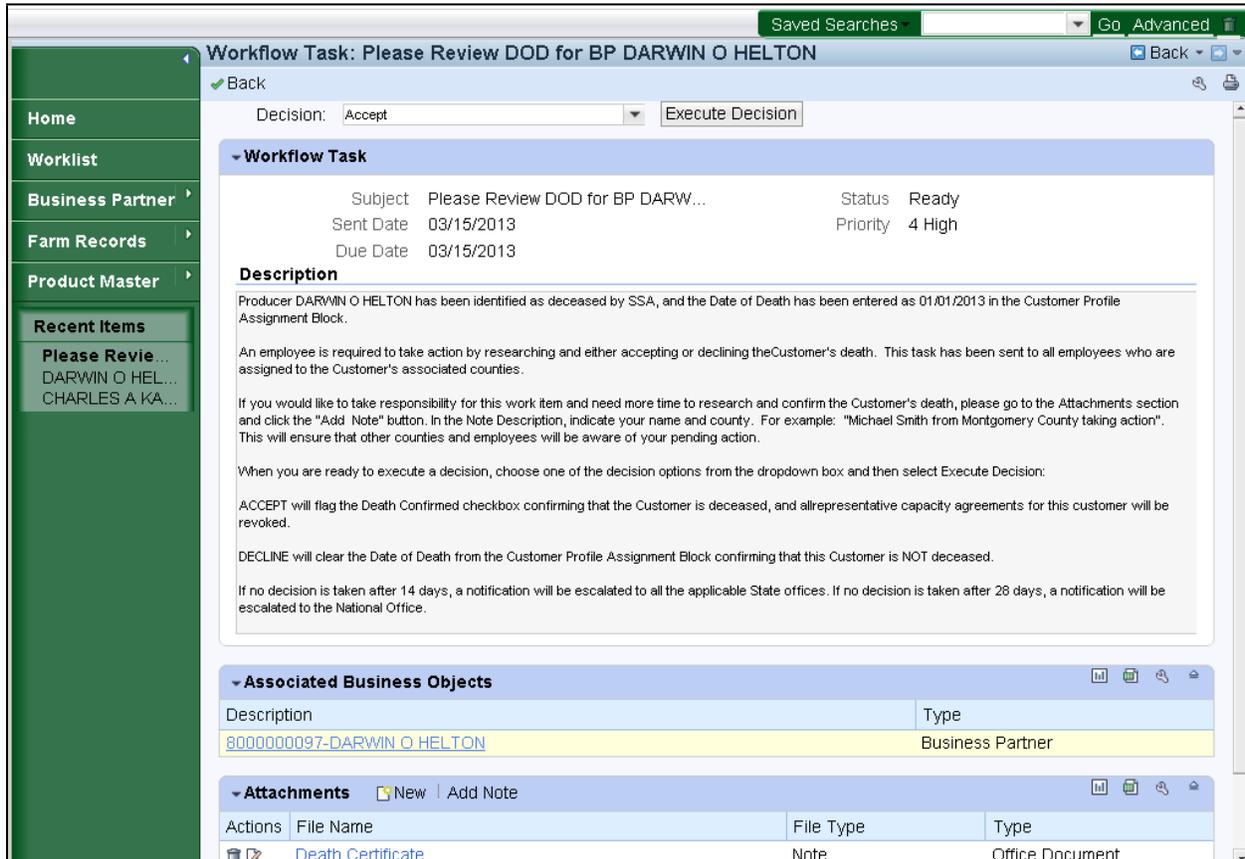
Workflow Tasks | Personalize Workflow Tasks

Due	Subject	Sent...	Due...	Priority	Associated...	Proc...	Sub Pr...
	Please Review DOD for BP BRENT O MUELLER	03/...	03/...	4 High	800000002...	Bus...	Date o...
	Please Review DOD for BP BRENDA I HILL	03/...	03/...	4 High	800000042...	Bus...	Date o...
	Please Review DOD for BP CARL O BURKHALTER	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BRETT T MEYER	03/...	03/...	4 High	800000003...	Bus...	Date o...
	Please Review DOD for BP BRUCE A BLUM	03/...	03/...	4 High	800000018...	Bus...	Date o...
	Please Review DOD for BP DARWIN O HELTON	03/...	03/...	4 High	800000009...	Bus...	Date o...
	Please Review DOD for BP DALE A THULINE	03/...	03/...	4 High	800000001...	Bus...	Date o...
	Please Review DOD for BP D E YOUNG	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BEVERLY O PUSCH	03/...	03/...	4 High	800000014...	Bus...	Date o...
	Please Review DOD for BP DAN E LIESENER	03/...	03/...	4 High	800000009...	Bus...	Date o...

Expand ◀ Back 1 2 Forward ▶

- Click the [Please Review DOD for BP DARWIN O HELTON](#) link

Workflow Task: Please Review DOD for BP DARWIN O HELTON



The screenshot shows a web application interface for a workflow task. The title bar reads 'Workflow Task: Please Review DOD for BP DARWIN O HELTON'. On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The 'Recent Items' section lists 'Please Review DOD for BP DARWIN O HELTON' and 'CHARLES A. KA...'. The main content area has a 'Decision: Accept' dropdown and an 'Execute Decision' button. Below this is a 'Workflow Task' section with a table showing task details:

Subject	Please Review DOD for BP DARWIN O HELTON	Status	Ready
Sent Date	03/15/2013	Priority	4 High
Due Date	03/15/2013		

The 'Description' section contains the following text:

Producer DARWIN O HELTON has been identified as deceased by SSA, and the Date of Death has been entered as 01/01/2013 in the Customer Profile Assignment Block.

An employee is required to take action by researching and either accepting or declining the Customer's death. This task has been sent to all employees who are assigned to the Customer's associated counties.

If you would like to take responsibility for this work item and need more time to research and confirm the Customer's death, please go to the Attachments section and click the "Add Note" button. In the Note Description, indicate your name and county. For example: "Michael Smith from Montgomery County taking action". This will ensure that other counties and employees will be aware of your pending action.

When you are ready to execute a decision, choose one of the decision options from the dropdown box and then select Execute Decision:

ACCEPT will flag the Death Confirmed checkbox confirming that the Customer is deceased, and all representative capacity agreements for this customer will be revoked.

DECLINE will clear the Date of Death from the Customer Profile Assignment Block confirming that this Customer is NOT deceased.

If no decision is taken after 14 days, a notification will be escalated to all the applicable State offices. If no decision is taken after 28 days, a notification will be escalated to the National Office.

The 'Associated Business Objects' section shows a table with one entry:

Description	Type
8000000097-DARWIN O HELTON	Business Partner

The 'Attachments' section shows a table with one entry:

Actions	File Name	File Type	Type
	Death Certificate	Note	Office Document

8. Click 8000000097-DARWIN O HELTON link label

[8000000097-DARWIN O HELTON](#)



The Description includes producer information and details for completing the task.

You can access and view the Business Partner record by selecting the link in Associated Business Objects.



Customer: DARWIN O HELTON

Customer: DARWIN O HELTON
Go Advanced

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

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

Please Review...

DARWIN O HEL...

CHARLES A. KA...

Customer Details
Customer Profile
Roles
Identification Numbers

Edit

General Data	Main Address and Communication Data
Current Role: Individual	Information Line:
BP Number / ID: 8000000097	Address Line: 1562 Main St.
Prefix:	PO Box:
First Name: DARWIN	City: CARTHAGE
Middle Name: O	State: IN Indiana
Last Name: HELTON	ZIP Code: 46115-9454
Suffix:	Country: US USA
Last Name at Birth:	Telephone Number: 800-000-0000
Legal Name: No	E-Mail Address: test@training.com
Common Customer...: DARWIN O HELTON	Communication Me...: E-Mail
Language Prefere...: English	
Data Origin: SCIMS	
Employee Type: Not an employee	
Tax ID Type: Social Security Number	
Tax ID Number: 888990016	

Notes

Control Flags

Archived:

Inactive:

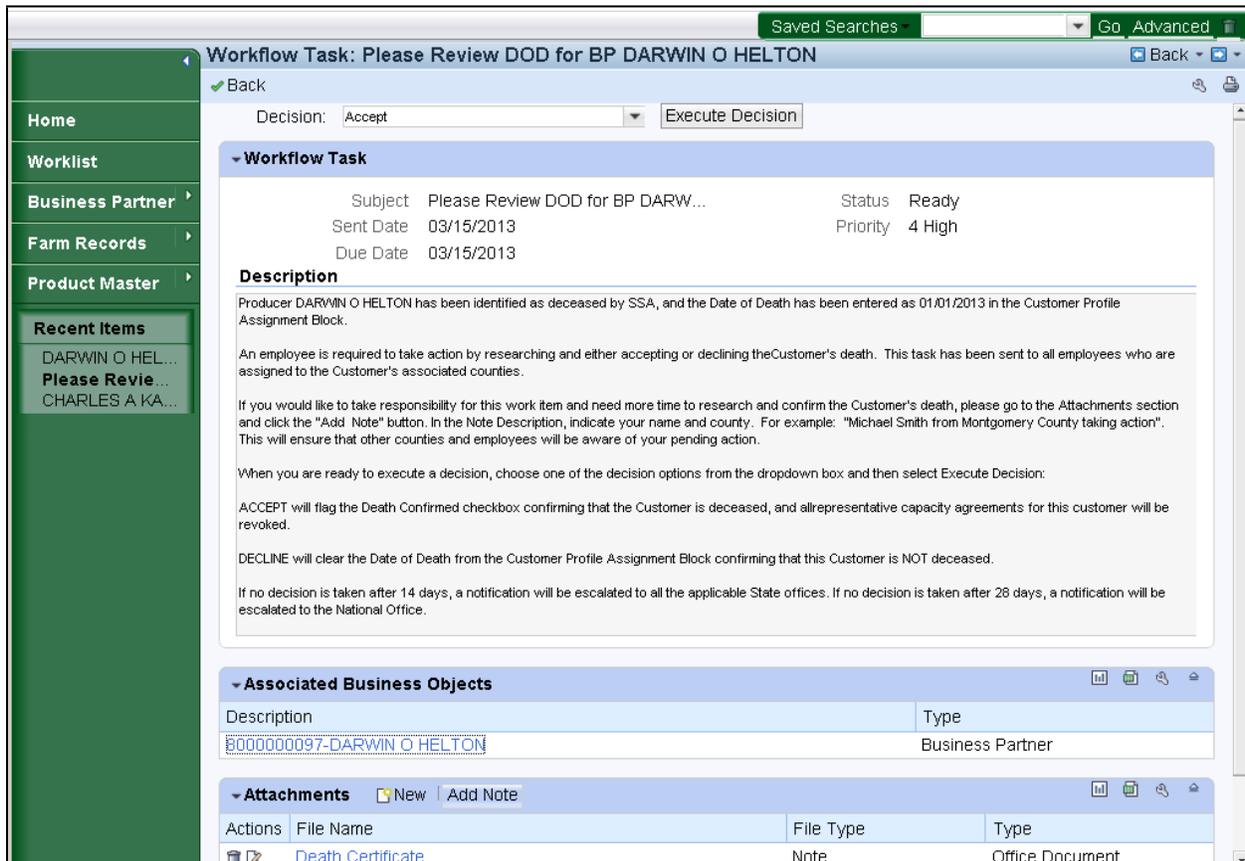
9. Click the Back button Back.

Tuesday, March 26, 2013

FN_Worklist_BP_Date_of_Death_en-US_en-US_en-US.udc

9/15

Workflow Task: Please Review DOD for BP DARWIN O HELTON



The screenshot shows a web application interface for a workflow task. The title bar reads "Workflow Task: Please Review DOD for BP DARWIN O HELTON". On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The "Recent Items" section lists "DARWIN O HEL..." and "Please Revie... CHARLES A KA...".

The main content area has a "Decision: Accept" dropdown and an "Execute Decision" button. Below this is a "Workflow Task" section with the following details:

Subject	Please Review DOD for BP DARW...	Status	Ready
Sent Date	03/15/2013	Priority	4 High
Due Date	03/15/2013		

The "Description" section contains the following text:

Producer DARWIN O HELTON has been identified as deceased by SSA, and the Date of Death has been entered as 01/01/2013 in the Customer Profile Assignment Block.

An employee is required to take action by researching and either accepting or declining the Customer's death. This task has been sent to all employees who are assigned to the Customer's associated counties.

If you would like to take responsibility for this work item and need more time to research and confirm the Customer's death, please go to the Attachments section and click the "Add Note" button. In the Note Description, indicate your name and county. For example: "Michael Smith from Montgomery County taking action". This will ensure that other counties and employees will be aware of your pending action.

When you are ready to execute a decision, choose one of the decision options from the dropdown box and then select Execute Decision:

ACCEPT will flag the Death Confirmed checkbox confirming that the Customer is deceased, and all representative capacity agreements for this customer will be revoked.

DECLINE will clear the Date of Death from the Customer Profile Assignment Block confirming that this Customer is NOT deceased.

If no decision is taken after 14 days, a notification will be escalated to all the applicable State offices. If no decision is taken after 28 days, a notification will be escalated to the National Office.

Below the description is the "Associated Business Objects" section, which contains a table:

Description	Type
B000000097-DARWIN O HELTON	Business Partner

The "Attachments" section has a "New" button and an "Add Note" button. It contains a table with the following data:

Actions	File Name	File Type	Type
	Death Certificate	Note	Office Document

10. Click the Add Note **Add Note** button.



Include a note or attachment in the Attachment assignment block to document important information or updates to the task. (e.g., "Left a message" or "Producer will deliver death certificate").



Note - Workflow Task

Description:

Text

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

Field	R/O/C	Description
Description:	R	Example: Death Certificate
Text	R	Example: Family will deliver today

12. Click the Save button .



Workflow Task: Please Review DOD for BP DARWIN O HELTON

Workflow Task: Please Review DOD for BP DARWIN O HELTON

Decision:

Subject: Please Review DOD for BP DARW... Status: Ready
 Sent Date: 03/15/2013 Priority: 4 High
 Due Date: 03/15/2013

Description

Producer DARWIN O HELTON has been identified as deceased by SSA, and the Date of Death has been entered as 01/01/2013 in the Customer Profile Assignment Block.

An employee is required to take action by researching and either accepting or declining the Customer's death. This task has been sent to all employees who are assigned to the Customer's associated counties.

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When you are ready to execute a decision, choose one of the decision options from the dropdown box and then select Execute Decision:

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Associated Business Objects

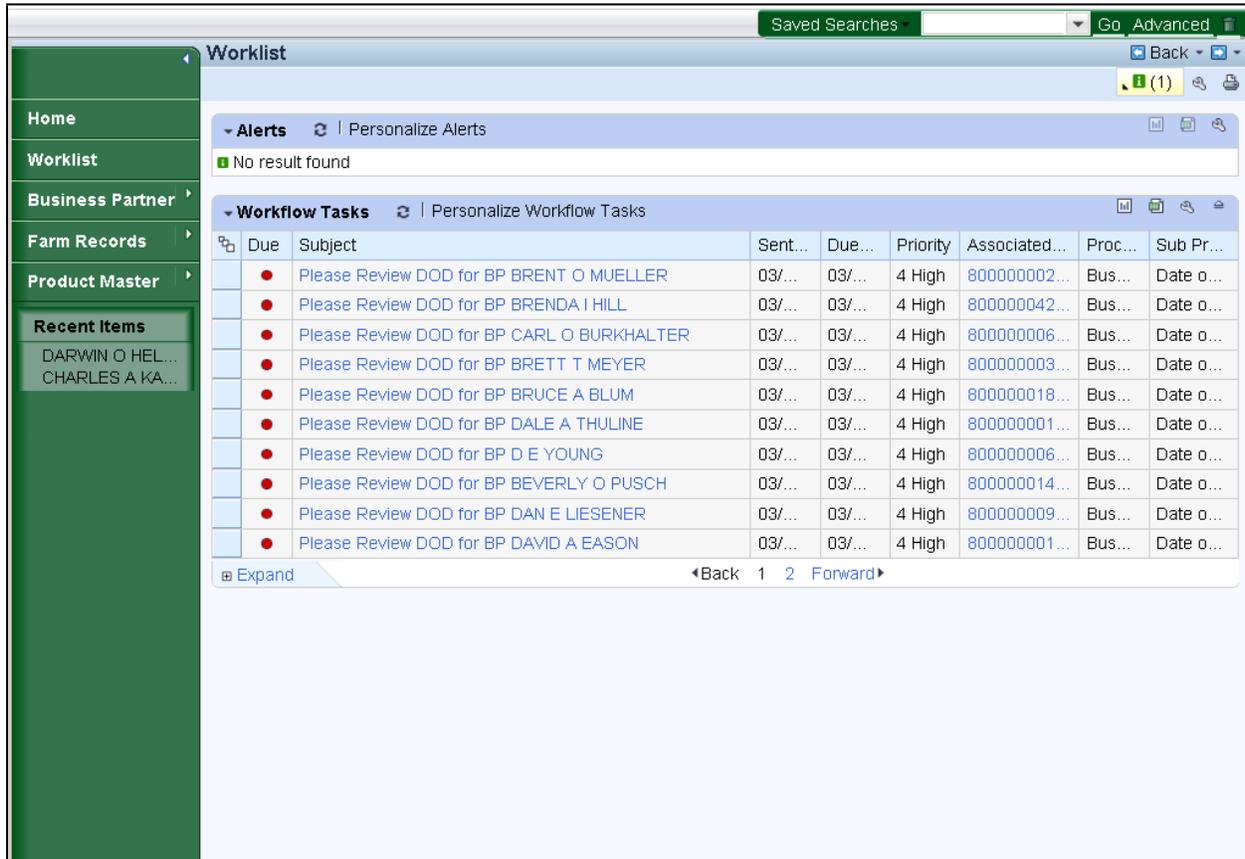
Description	Type
8000000097-DARWIN O HELTON	Business Partner

Attachments

Actions	File Name	File Type	Type
	Death Certificate	Note	Office Document

13. Click the Decision: drop down menu icon
14. Click the Accept item
15. Click the Execute Decision button

Worklist



Worklist

Alerts | Personalize Alerts

No result found

Workflow Tasks | Personalize Workflow Tasks

Due	Subject	Sent...	Due...	Priority	Associated...	Proc...	Sub Pr...
	Please Review DOD for BP BRENT O MUELLER	03/...	03/...	4 High	800000002...	Bus...	Date o...
	Please Review DOD for BP BRENDA I HILL	03/...	03/...	4 High	800000042...	Bus...	Date o...
	Please Review DOD for BP CARL O BURKHALTER	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BRETT T MEYER	03/...	03/...	4 High	800000003...	Bus...	Date o...
	Please Review DOD for BP BRUCE A BLUM	03/...	03/...	4 High	800000018...	Bus...	Date o...
	Please Review DOD for BP DALE A THULINE	03/...	03/...	4 High	800000001...	Bus...	Date o...
	Please Review DOD for BP D E YOUNG	03/...	03/...	4 High	800000006...	Bus...	Date o...
	Please Review DOD for BP BEVERLY O PUSCH	03/...	03/...	4 High	800000014...	Bus...	Date o...
	Please Review DOD for BP DAN E LIESENER	03/...	03/...	4 High	800000009...	Bus...	Date o...
	Please Review DOD for BP DAVID A EASON	03/...	03/...	4 High	800000001...	Bus...	Date o...

Expand | Back 1 2 Forward

16. Click the Expand message area link  (1) to review system message(s).

17. Click Collapse message area link .



Review the system message confirming the decision was executed and the work item was completed.



Result

You have successfully reviewed and approved a workflow task.



Next Steps