

Back Office: ACH		
Block 1		
Modules		Duration
QFD System Intro *Skip if learners are already familiar	<p>What is QFD?</p> <p>Why are we moving to this system?</p> <p>What changes can dispute experts expect?</p> <p>What is staying the same?</p>	30 min
Back Office Portal *Skip if learners are already familiar	<p>Tour the homepage</p> <ul style="list-style-type: none"> • Get Next Work • Recents • My Work • Search <p>Case Roll-up</p> <ul style="list-style-type: none"> • Overview of the case stages: Collect, Enhance, Analyze, Execute, Resolve • Iconography <p>Case Assets</p> <ul style="list-style-type: none"> • Claim type, dispute reason, regulation deadline where applicable • Accountholder's contact info • Editing the accountholder's contact info in QFD • Account details <p>Attachments</p> <ul style="list-style-type: none"> • Files submitted by the accountholder • Files attached by a claim intake specialist • Files from the Association • Attaching files as a back office analyst <p>Case Tools</p> <ul style="list-style-type: none"> • Accounting • Follow • Investigation • Related Cases • Transactions • Communication • Fraud Info • Notes • Tags <p>Case Tabs</p> <ul style="list-style-type: none"> • Assignment tab • Overview tab <ul style="list-style-type: none"> ◦ Customize Overview tab view ◦ Dispute-level accounting and audit ◦ Additional data • Audit tab • Questionnaire tab • External Case Status tab 	120 min

QFD FULFILLMENT TRAINING AGENDA



	Case lock Alarm bell Actions button <ul style="list-style-type: none"> • Add transactions • Contact date override *where enabled • Reclassify case • Refresh 	
Enhance Assignments	Process Enrichment Manually Review Documents	20 min
Practice	Learners to use the staging (test) environment to practice Enhance assignments	30 min
Block 2		
Modules		Duration
Analyze Assignments	Provisional Credit Review Review Fee Disposition Case Process Liability	60 min
Practice	Learners to use the staging (test) environment to practice Analyze assignments	60 min
Block 3		
Modules		Duration
Execute Assignments	Process Chargeback Execute Accounting Refund Fee	30 min
Practice	Learners to use the staging (test) environment to practice Execute assignments	30 min