

Back Office: ATM		
Block 1		
Modules		Duration
QFD System Intro *Skip if learners are already familiar	What is QFD? Why are we moving to this system? What changes can dispute experts expect? What is staying the same?	30 min
Back Office Portal *Skip if learners are already familiar	Tour the homepage <ul style="list-style-type: none"> • Get Next Work • Recents • My Work • Search Case Roll-up <ul style="list-style-type: none"> • Overview of the case stages: Collect, Enhance, Analyze, Execute, Resolve • Iconography Case Assets <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 Attachments <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 Case Tools <ul style="list-style-type: none"> • Accounting • Follow • Investigation • Related Cases • Transactions • Communication • Fraud Info • Notes • Tags Case Tabs <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 Provide Reference Key Provide Required Enrichment Data Review Documents	30 min
Block 2		
Modules		Duration
Analyze Assignments	Provisional Credit Review Fee Interest Calculation Disposition Case Pending Response (ATM Claims) Process Liability Responses	60 min
Practice	Learners to use the staging (test) environment to practice Analyze assignments	60 min
Block 3		
Modules		Duration
Execute Assignments	Execute Chargeback (ATM Claims) Execute Accounting Block Reissue Card Fraud Reporting Refund Fee	60 min
Practice	Learners to use the staging (test) environment to practice Execute assignments	60 min
Resolve Assignments	Accounting Exception	10 min