

Back Office: Card		
Block 1		
Modules		Duration
QFD System Intro	<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	<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	Authorizations node Enrichment node Documentation node	60 min
Practice	Learners to use the staging (test) environment to practice Enhance assignments	60 min
Block 2		
Modules		Duration
Analyze Assignments	Collaboration node Provisional Credit node Fees node Interest node Disposition node Note: There are 17 assignments in this node, but many may not be relevant to your portal. Responses node	120 min
Practice	Learners to use the staging (test) environment to practice Analyze assignments	60 min
Block 3		
Modules		Duration
Execute Assignments	Recovery node Accounting node Account Maintenance node Fraud Reporting node Stop Payment node	120 min
Practice	Learners to use the staging (test) environment to practice Execute assignments	60 min
Resolve Assignments	Paid/Denied node	