QFD INTAKE TRAINING AGENDA

Claim Intake		
Block 1		
Modules		**Duration**
QFD System Intro	What is QFD? Why are we moving to this system? What changes can intake specialists expect? What is staying the same?	30 min
Claim Intake Portal	Tour the homepage • Recents • My Work • Search • New	20 min

Claim Intake: Card	Account
	• Accountholder Search
	• Identify the Accountholder
	• Select the Account
	
	Reason
	• Which would you like to report? (Claim type)
	    o Non-fraud
	    o Fraud
	• Which best describes the reason? (Dispute reason)
	
	Detail
	• Transaction(s) select
	    o Pending transactions *where enabled
	    o Transaction already on an existing claim
	    o Manually adding a transaction that is not present *where enabled
	• Dispute-specific questionnaire
	• Required documents *where applicable
	    o How the accountholder can return the needed document
	    o How to obtain and upload the needed document as an intake specialist
	
	Summary
	• Disputed transaction summary
	• Confirmation screen
	• Withdrawing the claim properly
		60 min

Claim Intake: ATM *Where enabled	Account • Accountholder Search • Identify the Accountholder • Select the Account Reason • Which would you like to report? (Claim type) o ATM • Which best describes the reason? (Dispute reason)	30 min

	Detail
	• Transaction(s) select
	    o Transaction already on an existing claim
	    o Manually adding a transaction that is not present *where enabled
	• ATM questionnaire
	
	Summary
	• Disputed transaction summary
	• Confirmation screen
	• Withdrawing the claim properly	

Claim Intake:
ACH, Wire, P2P
*Where enabled
	Account
	• Accountholder Search
	• Identify the Accountholder
	• Select the Account
	
	Reason
	• Which would you like to report? (Claim type)
	    o Unauthorized
	    o Revoked
	    o Incorrect
	
	Detail
	• Transaction(s) select
	    o Transaction already on an existing claim
	    o Manually adding a transaction that is not present *where enabled
	• ACH, Wire, P2P questionnaire
	• WSUD document requirement for ACH debits
	
	Summary
	• Disputed transaction summary
	• Confirmation screen
	• Withdrawing the claim properly
		30 min

Claim Intake: Following-up on Existing Claims	Searching for claims in QFD using the claim ID, dispute ID, accountholder name, and other integrated searchable data points External Case Status • Case status bullet points Other Actions • Add a note • Request case is withdrawn • Upload a new file • View Communication	30 min
Practice	Learners to use the staging (test) environment to practice creating claims	60 min
Self Service *Where enabled		