

<b>Subject:</b> <b>Draft Increase</b>	<b>Product:</b> <b>Customer Loyalty Group</b>	<b>Approved On:</b>
--	--	---------------------

**Purpose:**

Increasing a client's scheduled program drafts.

**Policy:**

- Client authorizes an increase to their scheduled program drafts.

**Procedure:**

1. Click on client's *Calculator*.
2. In the Client Profile section of the Calculator, check to see if drafts will process.
  - a. If yes, continue to step 3.
  - b. If not, check client's Global notes to see why drafts are not processing successfully and obtain a new SPAA.
3. Scroll to *Draft Changes*, open toolbar to extend tab.
4. From *Draft Type* dropdown, select *Program Drafts*
5. Click *Refresh*
6. Click *All* to display all scheduled program drafts.
7. Select draft client is requesting to increase.
  - a. If client is requesting to increase all drafts, click *Select All*
8. Scroll to the bottom of *Draft Changes* section.
9. Using the *Debit Amount* field, type in the new draft amount
10. From the *Change Reason* dropdown, select *Draft Increase*
  - a. Request should be entered as a draft increase as opposed to creating completely new drafts (special draft)
11. Click *Update*
12. Obtain confirmation recording of draft increase:
  - a. "In order for us to accept verbal authorization, we need to record this call. Do I have permission to record your authorization for account number **Global Account ID** on **today's date**?"  
Now that this call is being recorded, can you please state your first and last name, date of birth, and last 4 digits of your Social Security number?  
Today, you are authorizing ClearOne Advantage to increase your scheduled draft(s) of **\$XXX** on **original draft date(s)** to **\$XXX**. (list each Draft Increase in this format) Do you authorize the increased drafts from your bank account for the amount and on the date mentioned?"
13. Scroll to the top of *Draft Changes* section.
14. Re-select drafts that are pending change.
15. Click *Finalize*
16. Scroll to *Client Balance Schedule*, open toolbar to extend tab.
17. Click *DL Global Data & Recalculate* to show increase made to drafts.
18. Scroll to *Historical Balance Saved or Save this*, open toolbar to extend tab.
19. Click *Save Balance*
20. Upload conformation recording to *Client Files* on client's home page.

**Exceptions:**

None

<b>Last Reviewed Date:</b> <b>8/14/2024</b>	<b>Page 1 of 1</b>	<b>Author of Latest Revision:</b> <b>Samantha Shumaker</b>
--	--------------------	---