

<b>Subject:</b> EMT RFSS Request	<b>Product:</b> Customer Loyalty Group	<b>Approved on:</b>
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**Purpose:**

To submit a request to remove an account from settled status due to:

- The client wants to remove the account from their program.
- The client is unhappy with the settlement.
- The client wants funds to be used towards another settlement opportunity.

**Procedure:**

1. Advise clients of the benefits of keeping the account in settlement.
2. If the first payment was already made, advise the client that the remaining fees will still be owed and will need to be cleared before the next settlement is made.
3. Complete an [RFSS](#) recording.
4. Put in an RFSS request for that settlement they are going to lose.
  - a. On the Client Page, click *Request Section*.
  - b. Click the *Add Request* button.
  - c. From the *Request Type* dropdown, select *EMT-RFSS*
  - d. In the *Related Creditor* dropdown, select any of the client's creditor(s) that are affected.
  - e. From the *Responder* Dropdown, select EMT Queue
  - f. From the *Processor* dropdown, select your name.
  - g. From the *Internal Status* drop down, select Waiting on Responder
  - h. Type a note in the *Request* field. Briefly explain the reason we need to RFSS the account. Include all settlements that need to be RFSS'd.
  - i. In the *Next Global Occurrence* field, select today's date.
  - j. Click the *Save & Close* button.
5. Leave notes in the Comment Section of the Client Page.

**Exception:**

If the client has a shortfall within 30 days or the client is escalated, send an email to [EMT@clearoneadvantage.com](mailto:EMT@clearoneadvantage.com). Explain why the request is urgent. There will be a dedicated team that will prioritize those requests and respond back to your email with support.

<b>Last Revision Date:</b> 8/29/2025	<b>Page 1 of 1</b>	<b>Author of Latest Revision:</b> Samantha Shumaker
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