

Subject: EMT RFSS Request	Product: Customer Loyalty Group	Approved on:
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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. 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.

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