Subject: Authorizing Third Parties	Product: Customer Loyalty Group	Approved on:

Purpose:
Authorizing a third party to speak or obtain information about a client's program.

Policy:
- Client gives authorization to ClearOne Advantage to speak with a third-party authorizer.
- The "Authorization for Third-Party Communication" document must be signed and returned by the client before the third party can call to discuss his/her program.
- The COA third-party auth allows the user to contact COA regarding the client/co-client program progress, discuss accounts, and settlement offers (discuss breakdown, percent, terms)
- COA third party auth, should not allow the user to complete anything that is tied with Global Holdings, such as, drafts, SD's, NSF's, bank changes, global auths, add/remove accounts and cancels.

Procedure:
1. Determine if authorization is for this call or permanent authorization
    a. For this call only, client can provide verbal authorization
        i. While notating the client's account, state that authorization was a one-time authorization and the name of the 3rd party.
            1. E.g. *one-time authorization for John Smith*
    b. For permanent authorization, skip to step 2
2. Check the *Alerts* and *Client File* on the account to see if authorization has been obtained
    a. If authorization has been obtained, stop here
    b. If authorization has not been obtained, skip step 3
3. Open blank copy of the *Authorization for Third Party Communication* document in Microsoft Word
    a. ***Authorization for Third Party Communication***
4. Type the client and/or co-client name in the first field
5. Type the name of the authorized third party in the second field
6. Click the *File* button
7. Click the *Save As* button
8. Select a folder from the menu on the left that you use to save documents
9. Name the document
    a. *Client's Name* third party authorization
10. Click the *Save* button
    a. Send the authorization document to the client via DocuSign Reference ***Sending a DocuSign Document***
11. When the Completed DocuSign is received, attach the document to the *Client File*
12. Add *Alert* to Client Page
    a. *"Authorized person's name"* has been authorized to speak on account
13. Click the *Save & Close* button

Exceptions:
none