Subject: Purged Accounts	Product: Customer Loyalty Group	Approved on:

Purpose:
Clients who have completed or canceled the program contact CLG with questions about their account(s), but their file has been purged from QuickBase.

Policy:

- Client has graduated from program but is still receiving collection activity on their settled account(s).
- Client has graduated/canceled and has funds remaining in their Global Holdings account

Procedure:

1. Go to the *Home* tab on QuickBase
2. Click on *Purged Clients*
3. In the search bar enter one of the following:
    a. Client name
    b. Client phone number
    c. Client SSN
4. Click the *Search* button
5. Verify client's account by one of the following:
    a. Phone number
    b. SSN
6. Provide client with information that they are needing from documents in client files
7. If clients request/concern is due to continued collection activities or funds remaining in their Global Holdings account proceed to step 8
8. Reach out to Operations based on the request
    a. If client's request is creditor related
        i. Send email to CLG Operations "clgoperations@clearoneadvantage.com"
        ii. Subject: Purged Client {Client Name}
        iii. Body:
            1. Purged Link
            2. Creditor of collection/legal notice (**must** be uploaded to the client files to work the account. If the client doesn't have documentation, the client will need to contact their creditor to obtain the document prior to sending an email to Operations).
            3. Attach documents
        iv. Operations will review the purge client email and determine if we need to escalate to our complaints team for further review.

    b. If client's request is Global Holdings related:
        i. Send email to your direct leader (if your leader is out, send to their POC)

ii. Subject: Purged Client {Client Name}
iii. Body:
   1. Purged Link
   2. Client address
   3. Balance
   4. Reason for request
   5. Was client completed (graduated) or canceled
iv. Leadership - Send email to:
   1. If Client was Canceled: Client Transaction Distro

v. Reminder – Account will still confirm that no additional fees need to be pulled for services provided by ClearOne Advantage prior to sending remaining balance to client

Exceptions:

- If we did not settle the account(s) during the program, we will be unable to reach out to the creditor(s) on the client's behalf.