Purpose:
Client refers friend and/or family member to the program.

Policy:
- Referee contacts CLG to advise that they have referred a family member/friend to the program
- Earn up to $500 towards clients next obtained settlement(s) per referred client (no limitations on referral)
  - First $250 gets paid out once referred friend/family member 1st program draft cleared in their Global account
  - Second $250 gets paid out once referred friend/family member received and approved their 1st settlement

Procedure:
Step 1: Access Client Information

1. Pull up the **referred client's account**.
2. Go to the **Calculator** tab.

If the Referee is Asking About the First $250 Bonus

✅ ***If the referred client's first draft has cleared:***

A. Referee is **currently enrolled:

Open the **referee's Client Page**.

Go to the **Request** tab.

Click **Add Request**.

Fill in the following:
- *a.* **Request Type**: *Client Referral*
- *b.* **Responder**: *Your name*
- *c.* **Internal Status**: *Waiting on Accounting*
- *d.* **Next Global Occurrence**: *Today's date*
- e. **Request Notes**:
  "Client referred [Client ID – Client Name] and 1st draft has cleared successfully in Global. Please apply first $250 bonus."

Click **Save & Close**.

Add a **Comment** on the referee's account noting this step has been completed.

B. Referee is **no longer enrolled (graduated):

Email your **Team Lead or Manager** with:

i. The referee's name and details.
ii. A note that the referee is no longer enrolled but qualifies for the **first $250 bonus**.

The Team Lead/Manager will contact **Accounting** to process the payment manually.

❌ ***If the referred client's first draft has NOT cleared:***

Inform the referee:
"Once the referred client's first draft clears, the $250 bonus will be deposited into your Global account or personal bank account, depending on your current program status."
Add a **Comment** on the referee's account with this update.

If the Referee is Asking About the Second $250 Bonus

✅ ***If the referred client's first settlement has been obtained and authorized:***

Open the **referee's Client Page**.
Go to the **Request** tab.
Click **Add Request**.
Fill in the following:

f. **Request Type**: *Client Referral*
g. **Responder**: *Your name*
h. **Internal Status**: *Waiting on Accounting*
i. **Next Global Occurrence**: *Today's date*
j. **Request Notes**:

"Client referred [Client ID – Client Name] and 1st settlement has been obtained and authorized. Please apply second $250 bonus."
Click **Save & Close**.
Add a **Comment** on the referee's account noting this step has been completed.

❌ ***If the first settlement has NOT been obtained and authorized:***

Inform the referee:

"Once the referred client's first settlement is completed and authorized, the $250 bonus will be deposited into your Global account or personal bank account, depending on your current program status."

Add a **Comment** on the referee's account with this update.

✅ **Final Reminder**

Always **document each step** of the referral bonus process in the **Comment section** of the referee's account.

Handling Requests for Purged Clients

Since requests cannot be submitted directly for purged clients, the following process must be followed:

- The manager must email the Accounting team directly.
- The email should include:
  - The purged client's linked or referred client information
  - A brief explanation of the request or issue
  - Any relevant supporting documentation or context

This ensures Accounting has the necessary information to process the request appropriately.

Exceptions:

- If the referee is no longer enrolled into the program, referral bonus funds will be sent to the bank account that was associated with the program when enrolled
  - If referee is still enrolled, funds will be deposited into GCS account to use toward next settlement. **Funds cannot be transferred from the referees Global account to their personal account for personal spending.**
- If the client has advised an agent from a different department other than CLG, please send client referral information to CLGOps@ClearOneAdvantage.com to process the client referral request