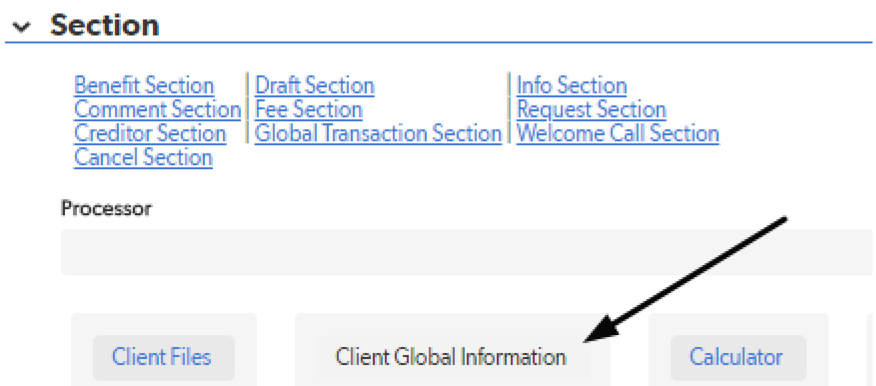
Purpose:
Accessing a client's Global account from QuickBase.

Policy:

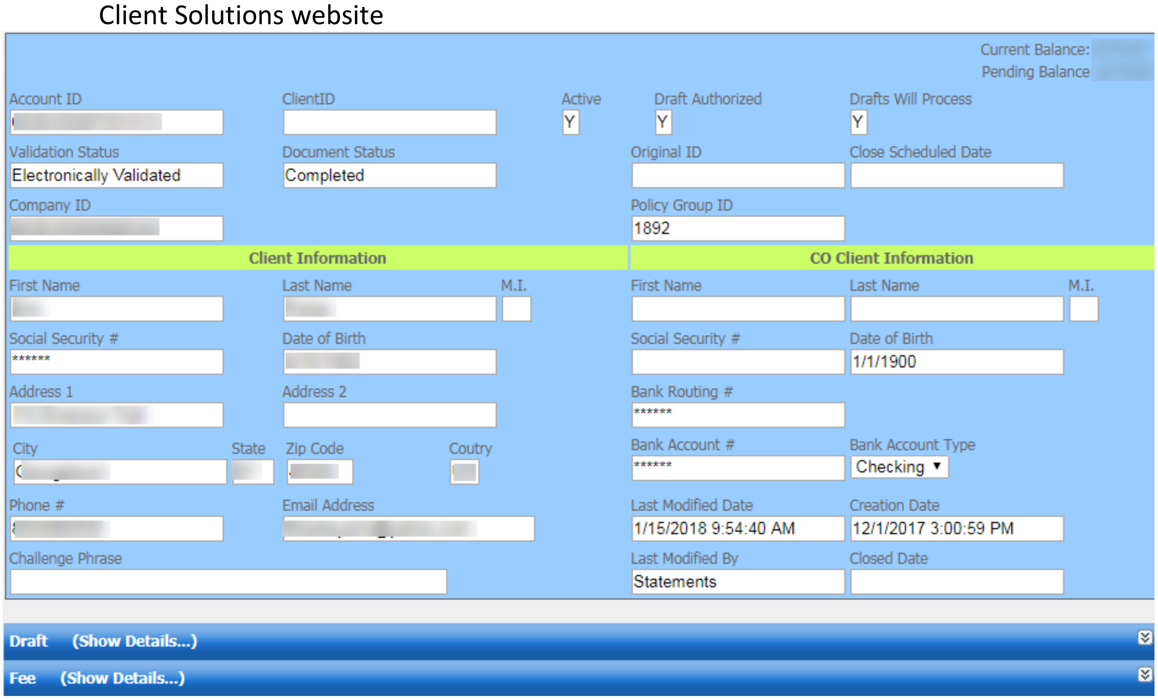
- Verify up-to-date status regarding client's Global account
- Client is waiting to receive a refund/withdrawal and would like to check the status
- Ensure scheduled drafts and/or payments have successfully processed and cleared

Procedure:

1. As pictured below, click on the *Client Global Information* button from the client's page



2. As pictured below, each section will contain the same information provided on Global Client Solutions website



Exceptions:

1. None