Subject: **Adding/Removing Co-Clients**	**Product:** **Customer Loyalty Group**	**Approved on:**

Purpose:
Adding a co-client to a client's program.

Policy:
- Client spouse and/or additional authorizer wasn't added during enrollment.
- Adding additional accounts to program which are not in the client's name.

Procedure:
1. On QuickBase, click the *Add Request* button from the *Request Section*
2. From the *Request Type* dropdown, select *info change request*
3. From the *Responder* dropdown, select your name
4. From the *Internal Status* dropdown, select waiting on responder
5. For the *Next Global Occurrence*, select Today
6. In the *Request* note add detail of the status and updates
7. Click the *Save & Close* button
8. Create a new SPAA with Co-Client info added **Follow "Creating SPAA -Updating Banking SOP".**
    a. Reference Creating Special Purpose Account Application SOP
    b. Upload signed SPAA to client file and Crush FTP(Follow updating client info process)
9. From the Client Page, click on "Processing information" tab
10. Fill out the *Co-Client Name*, *CoClient SS#* and *CoClient DOB* field
11. Notate all changes that were made in the Comment section on the Client Page
12. Click the *Save & Close* button
13. If co-client debt is being added: (If debt not being added, skip this step)
    a. At the top of the Client Page, click the *Pull Client Credit Report* button
    b. Obtain clients authorization to pull Transunion credit report
        i. Reference ***Credit Pull SOP*** and ***Credit Pull Script.doc***
    c. Click the *Pull Co-Client Data* button
    d. Save co-client credit report to the Client File
14. Mark your request as ***complete once confirmed*** that SPAA has been processed and co-client has been added to Global.

Exceptions:
- If the co-client is **requesting to be removed** from the program: **(Please follow step 1-9)**
    - Submit Program Change to remove all accounts belonging to the co-client
    - Remove co-client information from the *Info Section* on the Client Page
        - *Co-Client Name*, *Co-Client SS#* and *Co-Client DOB* field
    - Inform Co-Client they must re-enroll with an Account Executive if they wish to start their own program