

**Purpose:** To gain a recording from client if they're in a settlement and making payments to a creditor that is enrolled outside of the program.

**Policy:**

- Confirm if the client has made a payment to a creditor outside of the program so that EMT can update any settlement payments scheduled in global.
- Ask client to confirm:
  - a. Date of first payment sent to the creditor
  - b. Amount of payment

**Procedure:**

- Call into the *Record Authorization* line in *InContact*
- Press Option 2 for *Authorizations*
- Conference in the client
- Proceed with the script below:

"This call is being recorded or monitored for quality or training purposes. "Are you in agreement to have this call recorded?" Client Response: YES

This recording is to confirm that a payment was pulled from your personal banking account on or about [Date of first payment] in the amount of [amount of payment] for the [Creditor Name] settlement that Clear One Advantage negotiated on your behalf.

Do you agree that this is accurate? Client Response: YES

Please state your name, date of birth, last 4 digits of your Social Security Number, and today's date for the recording. Client: [Name, DOB, Last 4 of SSN, and today's date]"

**CLO Email/Chat Script**

CLO can use the Email Version of this script –

- Change the second word to either *email* or *chat*
- Copy and paste the first paragraph below
  - a. Only copy and paste the paragraphs separately if in your in a chat. If not, copy and paste the script below and form the script together in an email format

"This email/chat is being sent for the sole purpose of a payment confirmation. Please confirm that a payment was pulled from your personal banking account on or about [Date of first payment] in the amount of [amount of payment] for the [Creditor Name] settlement that Clear One Advantage negotiated on your behalf. Do you agree that this is accurate? Client Response: YES

- Proceed with sending the following into the chat (Follow letter a above if sending script via email)

Please state your name, date of birth, last 4 digits of your Social Security Number, and today's date for the recording. Client: [Name, DOB, Last 4 of SSN, and today's date]"