

For Phone or Fax number change:

- TAG will check Account opened status as account should be open. If closed, then case needs to be rejected.
- TAG will check client letter with signature verification. It should be only Fax with call back or Original Letter/Docusign.
- Tag will check client signature with repository from DB Force.
- Case will pop up all the numbers listed on DB Force to Front officer so TAG needs to verify all numbers from DB Force contact page or Metavante along with new number. All numbers should be same except the one requested to change by client.

For Email change:

- TAG will check Account opened status as account should be open. If closed, then case needs to be rejected.
- TAG will check client letter with signature verification. It should be only Fax with call back or Original Letter/Docusign.
- Tag will check client signature with repository on DB Force.
- Case will pop up all the email address listed on DB Force to Front officer so TAG needs to verify all numbers from DB Force contact page or Metavante along with new email address. All email should be same except the one requested to change by client.

Check Points:

- a. TAG verifies that client # on the case is matching up with the client # for Global plus accounts and ensures that the case specifies which address needs to be changed, i.e. primary, remittance, statement.
- b. TAG will verify that the client # and client name provided is valid and is affiliated to the account.
- c. TAG will accept instructions for a third party address change when is signed by Individual authorized signer on this account.
- d. TAG verifies the signature in the attachment with Specimen in repository.
- e. If the case is created for address change and is check marked on "Is this a legal address change" field, then the address should be mentioned in appropriate "address details" field and only in case description.

Exception: For Global plus accounts, Call back stamp is required in case of original letter.

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