

New Benefits System Training



Facilitator Guide

- Customer Accounts

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Course Code:	XXXXXX
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Table of Contents

Before You Begin	1
Facilitator Overview	1
Prerequisite	1
Preparation.....	1
Materials/Equipment	1
Agenda	2
Heading 1	3

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Before You Begin

Facilitator Overview



This module teaches participants how to use the Customer Accounts functions in the New Benefits System. The instruction is facilitator-led training and virtual instructor-led training (VILT). Participants will be engaged in classroom-based discussion and activities, as well as individual activities, using the *New Benefits System* Training participant guide (PG).

Facilitator Note for VILT

- This material is designed to be delivered virtually using Live Meeting.
- If you are conducting this training in a classroom environment, please adapt all virtual activities using flip charts, live poll, etc.
- Prerequisite
- Prerequisite

Prerequisites

- Access and Navigate the New Benefits System
- Search for a Benefit Record
- Establish a New Benefit Record

Preparation

- Select the live accounts for testing in Activities

Materials/Equipment

- *New Benefits System* Training participant guide
- Facilitator PC connected to intranet for VILT
- Facilitator PC projector with access to PowerPoint for ILT
- PCs with Intranet for participants
- Prepared flipcharts and markers for ILT
- Pens and pencils for participants
- Notepads for participants

Agenda

Topic	Estimated Time
1 Introduction	10 mins
2 View Customer Account Information	20 mins
3 Update Customer Information	20 mins
4 Stop Flags	20 mins
5 Create an Attachment	15 mins
6 Conclusion	5 mins
Total:	1.5 hrs

Introduction



10 mins

Time to complete this section: 10 mins



Facilitator Note

- Introduce yourself and welcome participants to the training session.



Facilitator Note for VILT

- Review Live Meeting features to be used during this session.
 - Sending a private question using Question Manager
 - Using the polling feature to record class responses

Overview

This training provides you with the skills you need to access and view customer benefits information. You will know how to update that information and add notes. In addition, you will learn how to tell when a customer account has been flagged. Finally, you will know how to attach information to a customer account.



Say

- During this training you will learn how to search for and find customer benefit information.
- You will also learn how to update customer information, and become aware of the procedures you must follow to make sure all departments have the updated information.
- Additionally, you will learn how to add notes to a customer account.
- You will learn how to tell if a customer account has been flagged.
- You will become familiar with the process for adding attachments to a customer account, in addition to learning what kinds of attachments you will add.

Introduction – continued

Objectives



By the end of the module, you should be able to:

- Locate customer benefits information.
- Update customer benefits information
- Add notes to a customer's case.
- Determine if the customer's account has been flagged.
- Add attachments to a customer's account.

View Customer Account Information



29 mins

Time to complete this section: 29 mins

Introduction

You will need to access customer benefit information so that you can review a customer's account to explain what benefits the customer currently has, and look for any changes you need to make. To do this, you must know how to use the New Benefits search screen, as well as the tabs and sub-tabs.



Slide # 2

Display

- Display PPT slide 2



Say

- Let's look at your new search screen.
- You can see that you have several ways to search for a customer, including searching by benefit number, customer name, address, and so on.
- For now, let's focus on two of the most common ways to find a customer: the benefit number and the customer name.

Entering the Benefit Number

If the you know the benefit number, you can enter it in the **Benefit #** field.

Enter the complete number then click **Search**.

Result: you can view the customer's information for that benefit number.

View Customer Account Information -

continued



Slide # 3



Display

- Display PPT slide 3

Say

- You can see the circled area on this slide.
- That is the benefit number field. Simply type in the benefit number.
- Click **Search** and you will see the screen containing the customer information for that benefit number.



Slide # 4



Display

- Display PPT slide 4

Say

- When you enter the benefit number and click **Search**, you will see a screen like this.
- For now, pay attention to the **Benefit File** section, where you can see items such as the number of payments made, the reported date and the loan number.
- Examine the **Benefit File** section so you can see the other types of information you can see for the customer.
- Do not worry about the lower sections at this time.

View Customer Account Information -

continued

Viewing the Customer's Benefit File

After you enter the benefit number in the **Benefit #** field and click **Search**, you can view the customer's information in the new screen that appears..

Note that you can see an array in the **Benefit File** section, including the number of payments made, reported date and the loan number.



Slide # 5

Display

- Display PPT slide 5



Say

- If you don't have the benefit number, you can search by using the customer name.
- Having the first and last name works best.
- Let's look at how to enter both names on the Benefits Search page.
- Notice that the first name has its own field, and the last name has a separate field. This is because you can actually search with either name, though your search results will be stronger if you enter both names.

View Customer Account Information -

continued

Searching by Customer Name

You can search for customer benefit information by entering the customer's name on the Benefit Search page.

Look for the **Borrower's Last Name** field and enter the customer's last name there.. If you know the first name, you can enter it in the **Borrower's First Name** field.

Click **Search** after you have entered the name.



Slide # 6

Display

- Display PPT slide 6



Say

- Notice that searching by name takes you to the Benefit File for the customer whose name you entered.

NOTE: End the FG with a blank "PG Body (outline)" format style to avoid problems when you use the Create PG button. See the Word Template and Style Guide for Training for more information.