Performance Improvement
Card Solutions Training
ClientLink/TBS Course Schedule
for CSCU

April						2014	May						2014	June						2014
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
30	31	1	2	3	4	5	27	28	29	30	1	2	3	1	2	3	4	5	6	7
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
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27	28	29	30	1	2	3	25	26	27	28	29	30	31	29	30	1	2	3	4	5

April, 2014

COMPROMISE MANAGER™ web	4/1
ClientLink Classroom	4/2-4
CL: New Accounts web	4/8
CL: Authorizations web	4/9
CL: Maintenance web	4/10
CL: Monetary web	4/16
TBS: Issuer Reports web	4/17
eZCardInfo/MyCardStatement web	4/22

May, 2014

ClientLink Business Card web	5/7
Lost/Stolen/Fraud & Disputes web	5/8
eZBusiness Card Management web	5/15
ClientLink Classroom	5/19-21
eZBusiness for FIs web	5/21

June, 2014

CB: Managing Fraud/Dispute Process	6/5
CL: Full Service Accounting	6/10
eZDisclosure	6/11
CL: Business Card	6/12

New This Quarter!

Did you know?	Did you know that if your financial institution participates in more than three webinars in a calendar year, you receive a discount of 50% on the additional scheduled webinars attended?

Registration and Contact Information

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Classroom
ClientLink

This classroom session is for users recently upgraded to the ClientLink interface or for a new staff person responsible for the day-to-day operation of the credit card program. Attendees will learn the basics of credit card processing in a hands-on environment. Practice sessions and materials are provided.

Topics include:

- Card Processing Overview
- Statements and Authorizations
- Account Inquiry and Maintenance
- Adding New Accounts
- Monetary Data Entry
- Recommended Reports

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Webinars
Authorizations, Statements, and Billing

Discover how authorizations work and what factors can affect authorization approvals or declines. Learn how to adjust items from the statement screen and what screens have an impact to cardholder billing

Topics Include:

- Impacts to Authorizations
- File Maintenance that Affects Authorizations
- Authorizations Screens
- Statement Screens
- Adjust Statement Items
- Bill Day/Bill Code changes
- Waive Fees/Finance Charges

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New Accounts, ICS, and Account Transfers

Now that you've got an approved credit card application, what's next? Learn the basics of establishing and auditing new and transferred accounts, and the process for reporting declined credit card applicants to the Issuers' Clearinghouse Service (ICS).

Topics Include:

- New Account Considerations
- Adding Consumer Cardholders Using the New Account Add Screen
- Reporting Declined Applicants to ICS
- Transferring Consumer Accounts Due to an Account Upgrade
- Recommended Reports

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Account and Delinquency Maintenance

Learn the process ClientLink users follow to add, delete, and/or modify account information. Included are demographic, plastics, and other changes or requests, as well as steps to maintain bankrupt accounts and perform chargeoffs. You will also learn to audit your maintenance using reports.

Topics Include:

- Demographic Changes
- Closing Accounts
- Plastic Orders and Card Activation
- Reissue/No Reissue
- Credit Limit Changes
- Delinquency and Bankruptcy Maintenance
- Charge-offs
- Payment Plan Options

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Card Program Features

Have you ever wondered how you can update your card program? Are you looking for ways to grow your card program AND make your job easier? Attend this webinar for ideas on all of this, and more!

Topics Include:

- FIS Resources
- System Program Parameters
- Processing Subsystems
- FIS Extras
- FIS Enhancements

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Process Visa Disputes in TBS Using DMS

This Visa-only webinar is for institutions that process their own chargebacks. Included are procedures for processing your own institution and cardholder-initiated chargebacks using the FIS Dispute Management Subsystem (DMS).

📌 For Visa chargeback reason code training, please refer to the Visa Business School at www.us.visaonline.com.

Topics Include:

- Keying Visa Draft Requests, Chargebacks, Pre-arbitration, Pre-compliance, and Representments
- Entering and Researching Items in DMS
- Monitoring DMS Reports

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Monetary Input

Attend this course for an overview of Transaction/Reason Codes and procedures on how to create and modify monetary batches. Learn the basics of how to key and trouble-shoot payments, adjustments and cash advances.

Topics Include:

- Understanding Monetary Transaction/Reason Codes
- Creating New Monetary Batches
- Troubleshooting Unbalanced Batches
- Reviewing Daily Monetary Batches
- Using the Spreadsheet Import Feature
- Keying Cash Advances

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Issuer Reports

What do you do with all of the reports you receive, and what should you be looking for?   Attend this webinar to learn more about the information available through reports and how to leverage the data for your institution.

Topics Include:

- New Accounts and ICS
- Account Maintenance
- Plastics and Reissue
- Risk Management
- Collections and Aging Reports
- Management Reports

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ClientLink Business Card

This session is designed for those responsible for day-to-day operations of your institution's Business Credit Card program. Learn how to operate your Business Credit Card program using the ClientLink interface.

Topics Include:

- ✦ Overview of the Business Card Product
- ✦ Setting up Companies, Divisions and Departments
- ✦ Establishing Master and Individual User Accounts
- ✦ Reports

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CollectorLink

CollectorLink is an online queuing system for collection accounts that allows for better management of collection activities. This session is designed for those responsible for day-to-day operations of your credit card collections using the CollectorLink system.

Topics Include:

- Differences Between ClientLink and CollectorLink
- System Structure in Queuing
- Working Individual Accounts
- Collector and Supervisor Screens
- Managing Collectors and Statistical Reporting
- Reports

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Full-Service Accounting

Learn how transactions post, where to find the numbers, how to make daily entries, and which reports can be used for research. Staff responsible for making entries and balancing the credit card loan portfolio will find this webinar helpful.

Topics Include:

- General Ledger Setup
- Transaction Life Cycle
- In-process Accounting
- Sample Daily Entries
- Reports

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eZCardInfo/MyCardStatement

This webinar is designed to help you understand how your cardholders will use eZCardInfo/MyCardStatement, the online application that offers cardholders a real-time interactive environment to access current account information. Cardholders can access copies of their statements, make payments, set bill reminders, view pending transactions, and even dispute a transaction.

Topics Include:

- Assisting Cardholders with eZCardInfo/MyCardStatement Questions
- Navigating the eZCardInfo/MyCardStatement Application
- Resolving Cardholder Log-in Questions
- Completing a Dispute Form in eZCardInfo/MyCardStatement
- Locating Payments, Transactions, and Statements
- Completing Key Tasks in eZCardInfo/MyCardStatement

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Self-Administered Accounting

Learn how transactions post, where to find the numbers, how to make daily entries, and which reports can be used for research.

Staff responsible for making entries and balancing the credit card loan portfolio will find this webinar helpful.

Topics Include:

- General Ledger Setup
- Transaction Life Cycle
- In-process Accounting
- Sample Daily Entries
- Reports

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eZBusiness for Financial Institutions

eZBusiness for Financial Institutions is available to all current TBS platform clients that use eZCardInfo/MyCardStatement for online cardholder access. Learn to access cardholder information to provide customer service. Access cardholder statements (PDFs), troubleshoot and maintain cardholder account information. Reset passwords, change e-mail addresses, and lock/unlock cardholder accounts.

Topics Include:

- ➤ Navigating the eZBusiness for Financial Institutions Application
- ➤ Performing Cardholder Searches
- ➤ Locating Statements in eZBusiness for Financial Institutions
- ➤ Retrieving Cardholder and Admin Reports
- ➤ Providing Login and Password support for Cardholders

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eZBusiness Card Management Web

Learn how institutions and their company administrators use eZBusiness Card Management to view all accounts associated with a company, make payments on behalf of their cardholders or billing accounts, generate reports, and more. The application not only helps institutions better market their resources and tools, but allows companies to better manage their credit card portfolios.

Topics include:

- Navigation and Cardholder Searches
- Locating Commercial Card Companies, Payments and Recent Transactions
- Retrieving Cardholder and Admin Reports
- Completing Service Requests and Online Messages
- Viewing Payments to the Central Billing Account or Individual Cardholder Accounts
- Creating a New Administrative User in eZBusiness Card Management
- Enabling Company Access to eZBusiness Card Management

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eZBusiness Expense Management Web

The eZBusiness Card Management Expense Management module allows a Company Administrator to add credit card accounts to cost centers and assign general ledger allocations to cost centers, credit card accounts, and expense categories. his module also allows a cardholder to submit an expense report, including credit card transactions, out-of-pocket expenses, and mileage expenses, to an administrative approver. This course will provide the information needed to configure and maintain Expense Management features.

Topics include:

- Navigation
- Cardholder Procedures to Create and Submit an Expense Report in eZCardInfo/MyCardStatement
- Company Admin Procedures to Establish Expense Report Settings and Configurations.
- Company Admin Procedures to Review, Approve, or Deny Expense Reports
- Company Admin Procedures to Add Various Transaction Types to Specific Expense Categories

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eZDisclosure

Want easy access to create and mail disclosures and agreements to help you comply with Federal regulations? Attend this webinar to learn to:

- Use the eZDisclosure system to create account disclosures and card agreements.
- Assign disclosures and agreements to new and/or reissuing accounts.

Topics include:

- Accessing the eZDisclosure Web Site
- Creating, Reviewing, and Approving New and Existing Disclosures/Cardholder Agreements
- How eZDisclosure interfaces with ClientLink

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Lost/Stolen, Fraud, and Disputes

What do I need to do to keep up with quickly-evolving fraud trends? How can I keep up with my cardholders? What do FIS and Visa and MasterCard do to help? This webinar discusses the roles, responsibilities and resources institutions have to keep up with lost/stolen accounts, fraud and other disputes.

Topics Include:

- ➤ Institution Roles and Responsibilities
- ➤ Following Up on Lost/Stolen and Fraud Accounts
- ➤ Dispute Process
- ➤ Monitoring Reports

📌   For detailed information on FIS procedures in setting up and working fraud and dispute cases, please refer to the **Chargeback Services – How to Manage Fraud/Dispute Process** webinar.

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Chargeback Services: Managing the Fraud/Dispute Process

Curious about how fraud and dispute cases are established and worked by FIS, and how to answer cardholder questions? This webinar highlights FIS Chargeback Services and details FIS, institution, and cardholder responsibilities to resolve fraud and dispute cases. The course offers a demonstration of the FIS Chargeback Portal to get you started using this resource to research your fraud and dispute cases.

Topics Include:

- Setting Up and Working Fraud and Dispute Cases
- Chargeback and Federal Regulation Z Timeframes for Processing Fraud and Dispute Cases
- Institution Best Practices
- The FIS Chargeback Portal

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COMPROMISE MANAGER™

COMPROMISE MANAGER is a secure, web-based tool used to help financial institutions effectively and efficiently manage compromised credit and debit card for both Visa and MasterCard fraud alerts. Learn how to use this tool to evaluate cardholder risk, facilitate selective account blocking, reissue plastics, and enable targeted fraud monitoring.

Topics Include:

➤ Considering Current Compromise Procedures
➤ COMPROMISE MANAGER™ System Navigation, Maintenance, and Action options
➤ Downloading and Uploading Steps for Risk Evaluation
➤ Review of TBS Screens
➤ Related Reports

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eLearning Courses

ClientLink eLearning

This multi-part course will help you learn how to log into ClientLink, the main screens used to navigate the system, and how to perform key tasks. In addition, you will examine the resources available to fully utilize ClientLink and all of its features.

Topics Include:

- Introduction to ClientLink
- New Accounts, ICS and Account Transfers
- Authorization Impacts I
- Authorization Impacts II
- Statements
- Billing
- Cardholder Demographics

- Memos
- Plastics
- Delinquency
- Monetary
- LetterChecks and Statement Checks
- ILSTQ Workflow Steps

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PI Express eLearning

PI *Express* is an account-level version of our more robust Portfolio Intelligence offering. This eLearning course will help you gain a better understanding of how to use PI *Express* to help you manage your credit card accounts.

Topics Include:

- Defining PI *Express*
- Features of PI *Express*
- Key Sections of the Query Screen
- Features of Starter Reports
- Report Options
- Creating a New Query
- Editing a Saved Query

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eZDisclosure eLearning

The eZDisclosure eLearning module provides a comprehensive overview of the key features and tasks in the eZDisclosure interface and demonstrates how eZDisclosure and ClientLink work together.

Topics Include:

- ◆ eZDisclosure Terminology
- ◆ Accessing and Navigating eZDisclosure
- ◆ Creating, Approving, and Applying a Terms ID
- ◆ Sorting, Editing, and Deleting a Terms ID
- ◆ How eZDisclosure Works with Other FIS Applications

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Consumer Card 101 eLearning

This eLearning course covers fundamental concepts of the Consumer Card product, including:

- How it emerged into an industry.
- Its authorization and security features.
- Transaction processes.
- Who's who in the industry?

The course is ideal for anyone who is new to the industry, or anyone who is growing in the industry and could benefit from refreshing their knowledge of the basics. There are five interactive learning checks throughout the module that are designed to reinforce knowledge and help apply new concepts.

Topics Include:

- Emergence of the Credit Card Industry
- Authorization and Security Features of a Credit Card
- Roles in the Credit Card Industry
- Credit Card Transaction Processes

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Developing a Plan to Grow Your Consumer Card Portfolio (for CSCU members) eLearning

This eLearning course will show you how to analyze and devise a plan for your portfolio. FIS will describe options you might consider, and leave the choice to you!

Topics Include:

- Portfolio Analysis
- Portfolio Plan
- Setting Goals
- Resources

To register for classes, please log onto the Learning Management System (LMS) https://training.fisglobal.com. Courses can be found in the Card Solutions folder within the Course Catalog. If you have questions or need assistance contact FIS at ask.education@fisglobal.com or call 800-215-6280 ext. 72104.