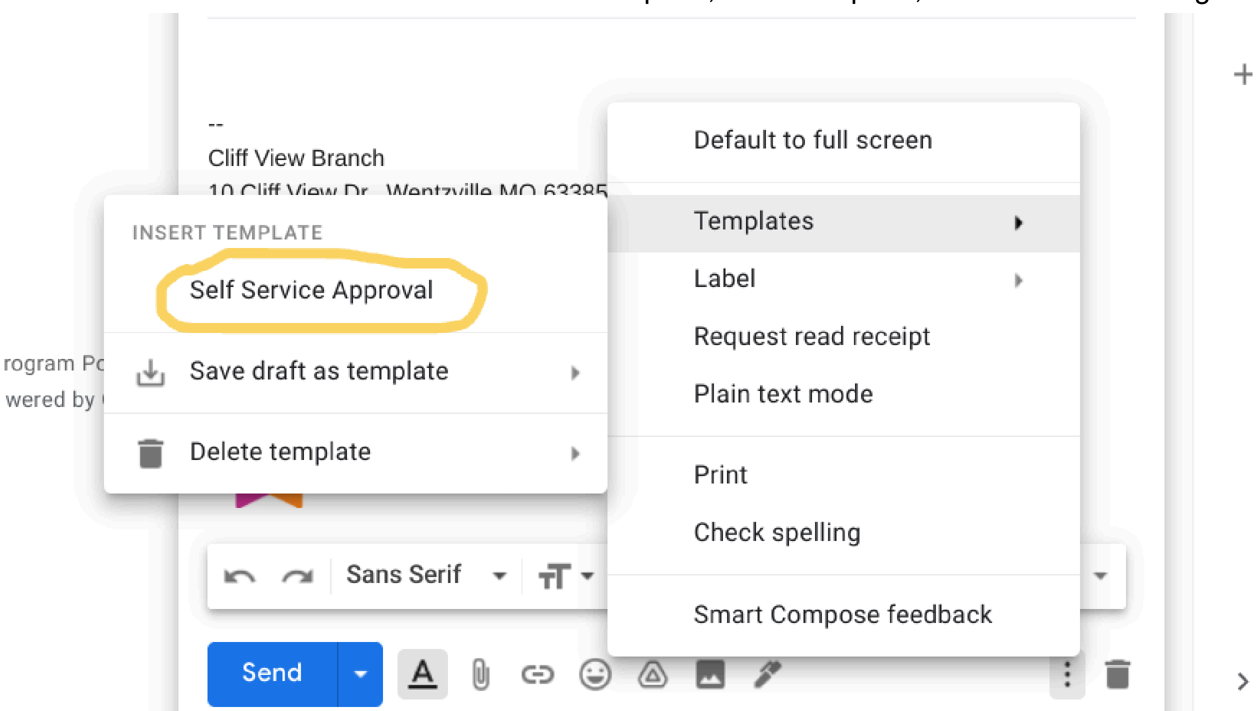
Processing Self Service Forms

In-branch

- If the customer comes to you at CV complete the form fully, verify ID and customer info
- Add LEAP access while the customer is there
- Place forms in folder and hold for 30 days
- You do not need to send them a confirmation email.

From Email

- Other branches will scan and email forms to us for processing. We will need to update customer LEAP accounts to grant Open+ CV access and contact the customer to let them know access is added.
- Look for ".Self Service Forms" folder on the left for new emails that need to be processed, as well as the general email inbox.
- Check customer info, update LEAP, then click "reply" to the email to create a draft. Put your name, date, and the format you contacted the customer in the draft but don't hit send ("MWhatley, completed 9/21, emailed customer"). Completed emails should all be left on read status, with a draft attached to it confirming it's been processed. We will hold these read emails in the folder for 30 days then delete them. You need to send them a confirmation email or call if they prefer.
- Contact customers by preferred method on form to let them know access is added. CV branch email has a template, click Compose, then "..." at bottom right:



- Click Self Service Approval to bring in the template and email it to the customer - no changes should be needed.
- If you need to call the customers just let them know you have updated their account, it's ready for use, and they'll need their PIN and card # to get in.