Client Training HQ

Processing Credit Requests

Credit Requests are accepted for the following reasons:

- A process was created within the last 90 days and deleted.
    - Fees are not charged for processes that were created and deleted on the same day.

      Note: Anything over 90 days is generally not credited.

- A process was created based on a recent migration (e.g., the process not being imported as expected).

Processes are billed as part of a nightly batch that runs at midnight. Credit Requests must be processed if the Request is on the following day.

If a case falls under one of these reasons, you may submit a Credit Request.

The Credit Request must include the following information:

- Date the process was created
- Process type (e.g., Consultation, L-1A/B, etc.)
- Foreign National (FN) name
- Reference number (if available)

To submit a Credit Request:

1. Create a case, marking it as the following:
    - Type: **Billing**
    - Case Reason: **Credit Request**

2. Enter the required Credit Request information (date created, process type, FN name, Reference number) in the **Description** field.
    - If needed, you can use one of the following email templates from the **Customer Support Current** folder to obtain the information from the customer:
        - Credit Request Information needed-deleted processes
        - Credit Request Information needed-migrated processes

3. Within the case click **New Credit Request**.

4. Enter information in the following fields:
    - Process Created Date
    - Process Type
    - FN Name
    - Reference Number

5. Select the reason for the Request (Process Deleted, Migration Related, Other); if "Process Deleted" is selected, review the database and confirm deletion prior to processing.
6. Click **Save**.
7. If needed, you can email the requestor using the template ****Credit Request Processed** in the **Customer Support Current** folder.
8. Close the Salesforce case.

More Training Available!

Check out additional training resources available on our site, Connections.

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.