DEMO List for IAG/Rescission Training(s) 2017:

1. Who initiates an Inadvertent? What takes place on Front End to identify IAG? What searches can take place via MT/MIS portal before a MT IAG is submitted? (Also part of best practices)
2. Are there different steps in submitting MarkeTrak if Losing submits or Gaining submits?
3. Communication between Gaining/Losing via the MarkeTrak issue once submitted?
4. Pointing out key data points on the MT – issue available date, Gaining CR Start Date, status, state change history, Active Owner, etc.
5. How to mark ‘closed’ if you’re not the Responsible MP or Submitter?
6. Example of DOL +1 or forward date looks like in the MT issue?
7. IAG Submitted by Gaining CR: Is it assumed Gaining agrees to whatever proposed regain date Losing submits? Once Losing CR is Responsible MP for IAG, do they have to send MT back to Gaining as Agreement? No but show what happens when the ‘MarkeTrak’ workflow allows them to send back to Submitter=Gaining CR in this scenario. Back and Forth steps? Is this date populated via the comments or actual field in the MT workflow? CReedys thoughts: best to place date in both places if allowed …
8. Specialized MarkeTrak Home Reports:
   1. 1st window: Inadvertents (IAGs) where CompanyXXX Owner is the ‘Responsible MP’
   2. 2nd window: IAGs where Company DUNS is the ‘Submitter’
   3. 3rd window: All MTs with status of ‘Ready to Receive’ indicating BDMVIs are ready to be sent
   4. 4th window: All ‘Failed, Pending Complete, Unexectuable’ MTs where Company DUNS is involved party
9. What’s the difference in Rescission Submit Workflow (Losing/Gaining) vs. Inadvertent Workflow?