



# Debt Manager FitPortal™

What you'll find...

- ✓ Links to video training
- ✓ Portal URL
- ✓ Debt Manager concept introductions
- ✓ Step-by-step guides for tasks

## Video Demos

A number of topics covered in this written manual have also been made into videos, featuring explanations and system demonstrations.

Topic	Link
Logging into the Portal for the First Time	<a href="https://youtu.be/CCKfjoKZe8Q">https://youtu.be/CCKfjoKZe8Q</a>
Adding the FitPortal to Your Favorites	<a href="https://youtu.be/bVozFBnlhgzg">https://youtu.be/bVozFBnlhgzg</a>
Clearing Your Cache	<a href="https://youtu.be/xqbMv7BJRHQ">https://youtu.be/xqbMv7BJRHQ</a>
Running and Viewing Reports	<a href="https://youtu.be/s1hbNiFudnc">https://youtu.be/s1hbNiFudnc</a>
Search and Search Results	<a href="https://youtu.be/d7q7qaD_jlw">https://youtu.be/d7q7qaD_jlw</a>
Agent Console Overview	<a href="https://youtu.be/JzJbwGaFu28">https://youtu.be/JzJbwGaFu28</a>
Documents	<a href="https://youtu.be/7DFNN7vmGZg">https://youtu.be/7DFNN7vmGZg</a>
Editing Debtor Contact Information	<a href="https://youtu.be/NQPEzV5Ko58">https://youtu.be/NQPEzV5Ko58</a>
Balance Calculation Tool	<a href="https://youtu.be/oePYASKNGGQ">https://youtu.be/oePYASKNGGQ</a>
Adding Notes and Tags	<a href="https://youtu.be/jWJ9NQWLJOI">https://youtu.be/jWJ9NQWLJOI</a>
Financial Center Overview	<a href="https://youtu.be/3FYFxFKHQmP0">https://youtu.be/3FYFxFKHQmP0</a>
Debtor Profile Overview	<a href="https://youtu.be/41GjGIRGTN8">https://youtu.be/41GjGIRGTN8</a>
Related Persons Overview	<a href="https://youtu.be/EmcLynU1Er0">https://youtu.be/EmcLynU1Er0</a>
User Defined Pages Overview	<a href="https://youtu.be/NttIQsVAXNI">https://youtu.be/NttIQsVAXNI</a>
Adding and Editing UDPs	<a href="https://youtu.be/XCEUazOwlm4">https://youtu.be/XCEUazOwlm4</a>
Deceased Debtor Information	<a href="https://youtu.be/18nrFhxnuCs">https://youtu.be/18nrFhxnuCs</a>

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# Logging In


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Microsoft Edge is the recommended browser to access the portal

<https://debtmanager.ohioattorneygeneral.gov/debtmanager>

Enter your portal login credentials and click **Sign in**.

 **DAVE YOST**  
OHIO ATTORNEY GENERAL

Sign in with your email address

Email Address

Password

[Forgot your password?](#)

**Sign in**

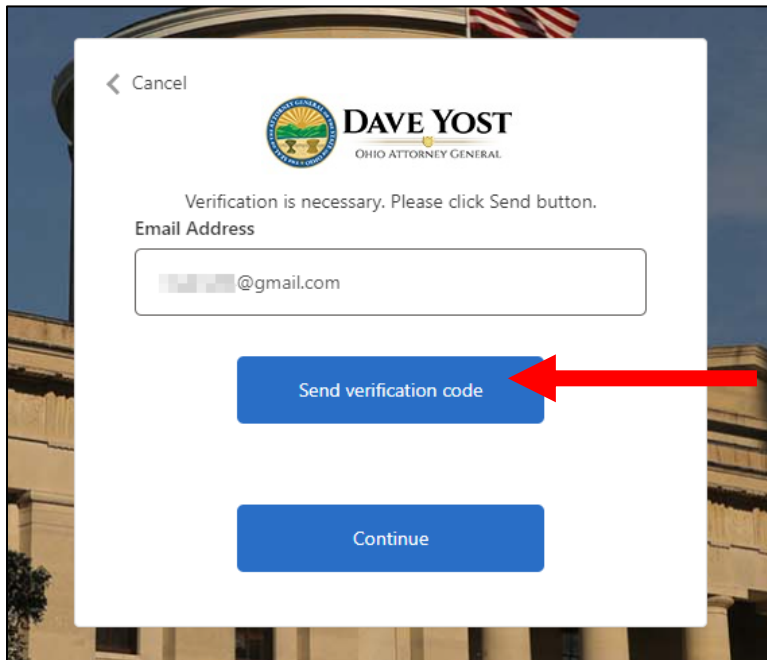
[Don't have an account? Sign up now](#)

Sign in with your OAG account

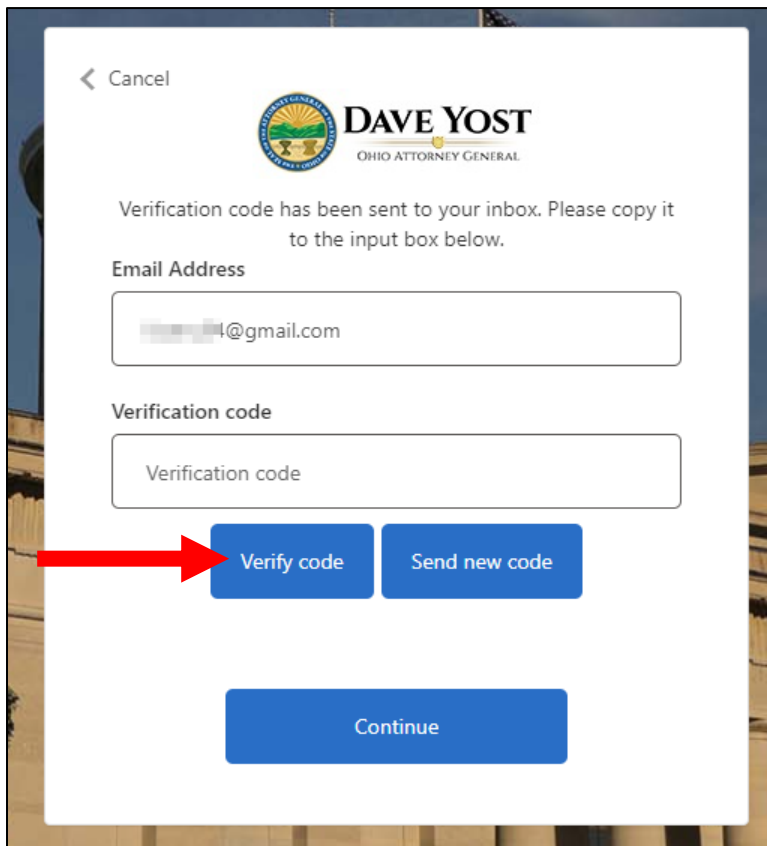
OAG Employee

WARNING! THIS SYSTEM CONTAINS U.S. GOVERNMENT INFORMATION. BY ACCESSING AND USING THIS COMPUTER SYSTEM YOU ARE CONSENTING TO SYSTEM MONITORING FOR LAW ENFORCEMENT AND OTHER PURPOSES. UNAUTHORIZED USE OF, OR ACCESS TO, THIS COMPUTER MAY SUBJECT YOU TO STATE AND FEDERAL CRIMINAL PROSECUTION AND PENALTIES, AS WELL AS CIVIL PENALTIES.

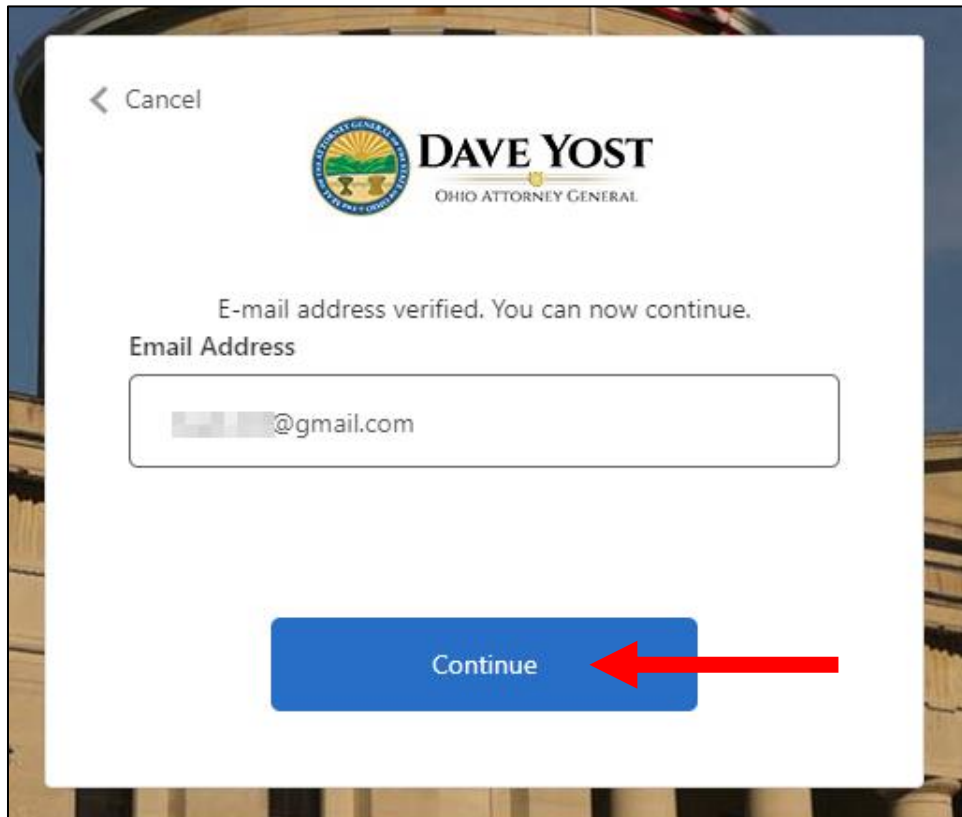
Click **Send verification code** and retrieve the code from your email.



Enter code and select **Verify code**.

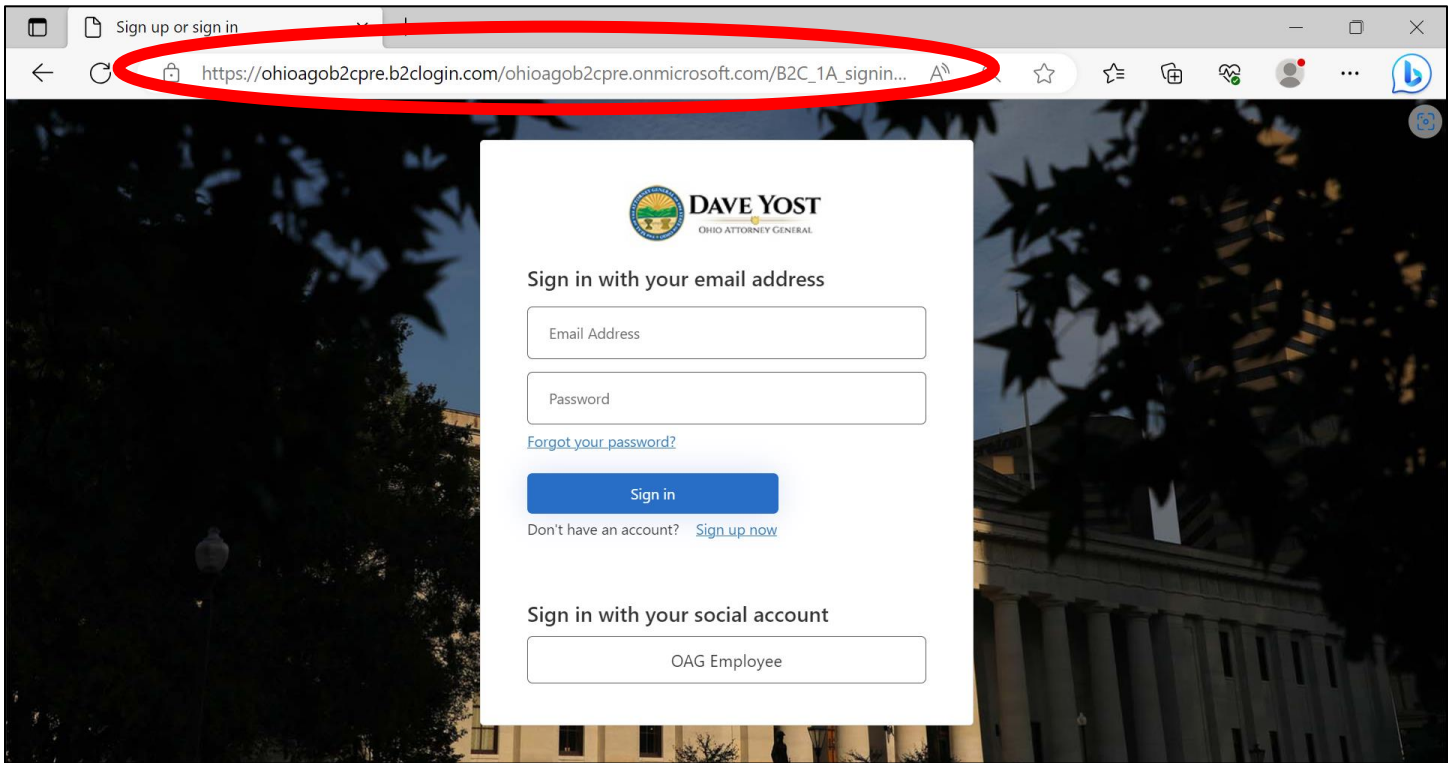



Click **Continue**.

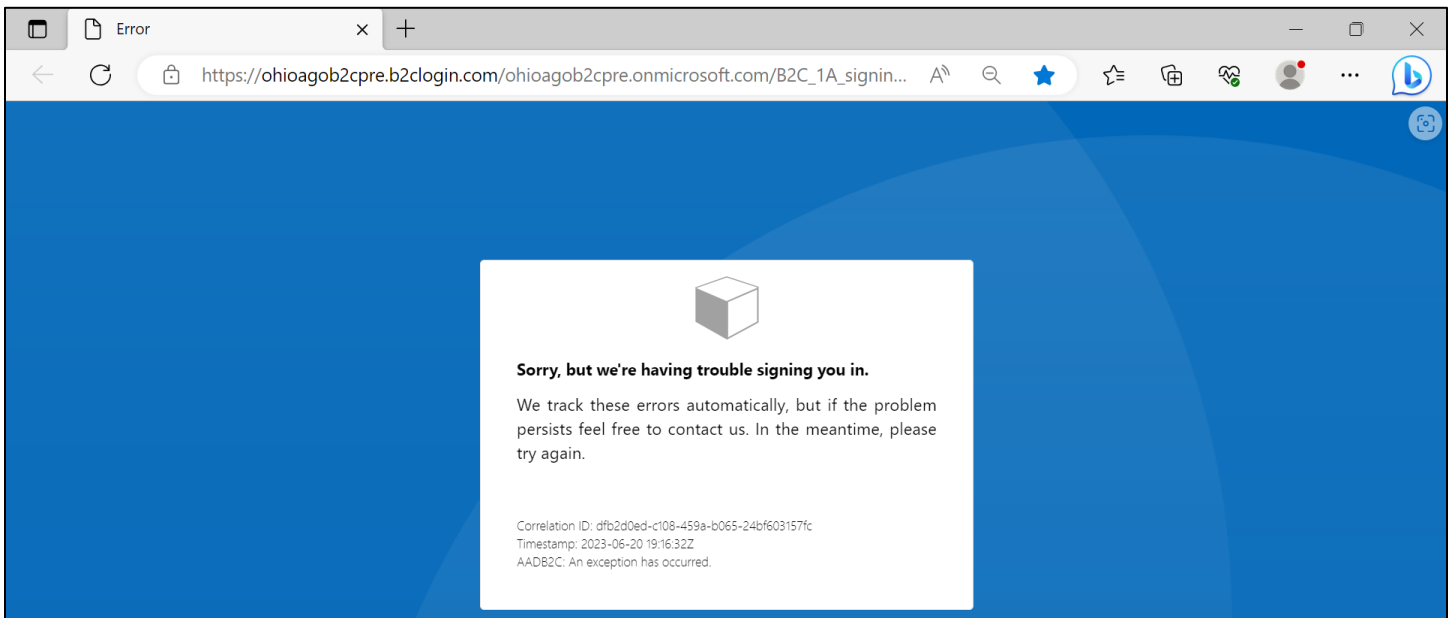


## How to Favorite the Portal URL

The portal URL redirects to our authentication login.



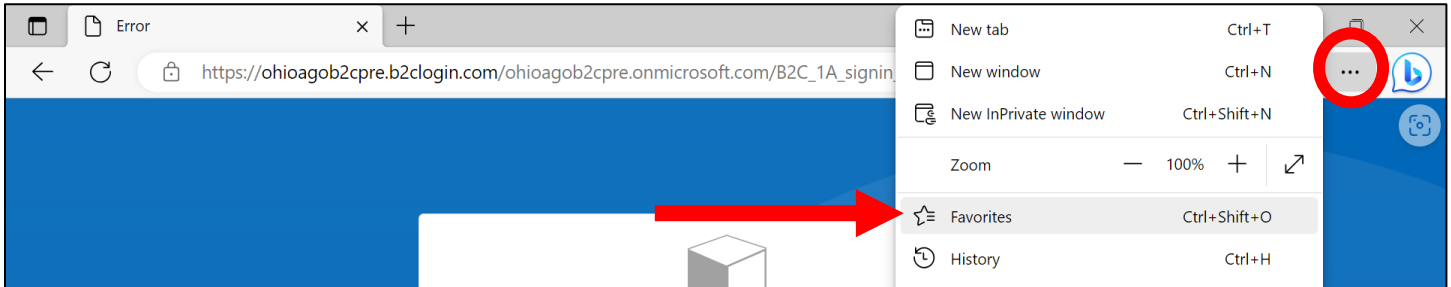
If you add this link to your favorites using the star icon , you may be redirected to an error page when accessing later on.



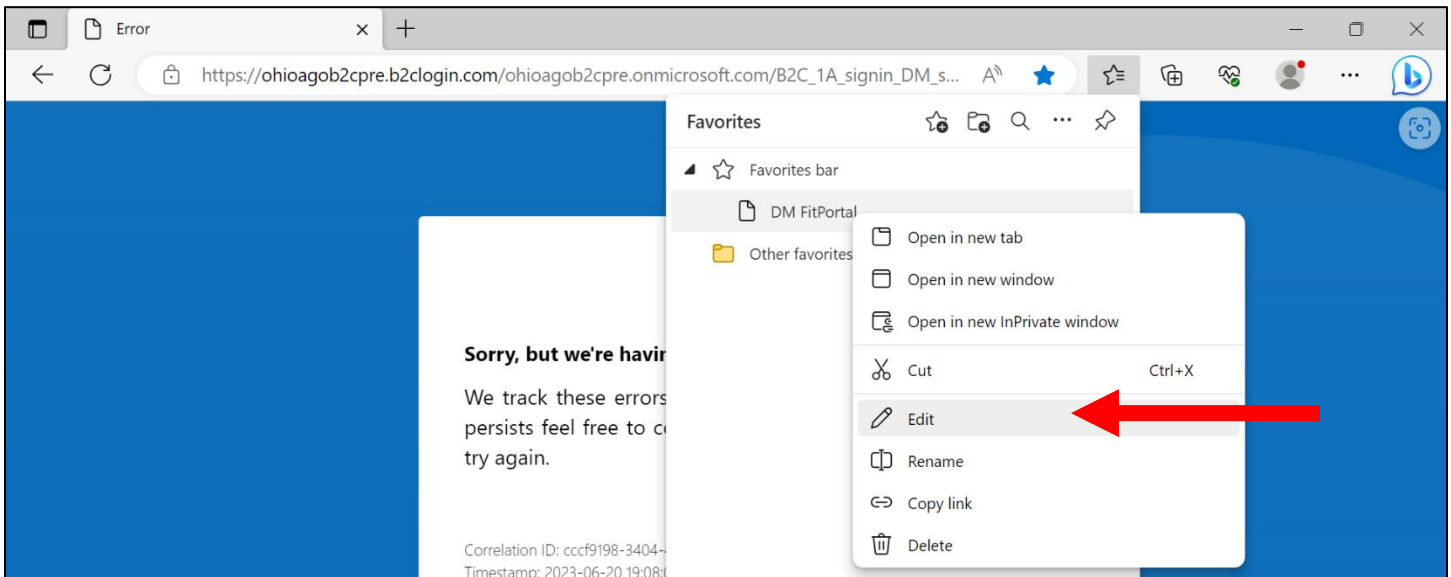


Follow the steps below to add the correct URL to your **Microsoft Edge** Favorites.

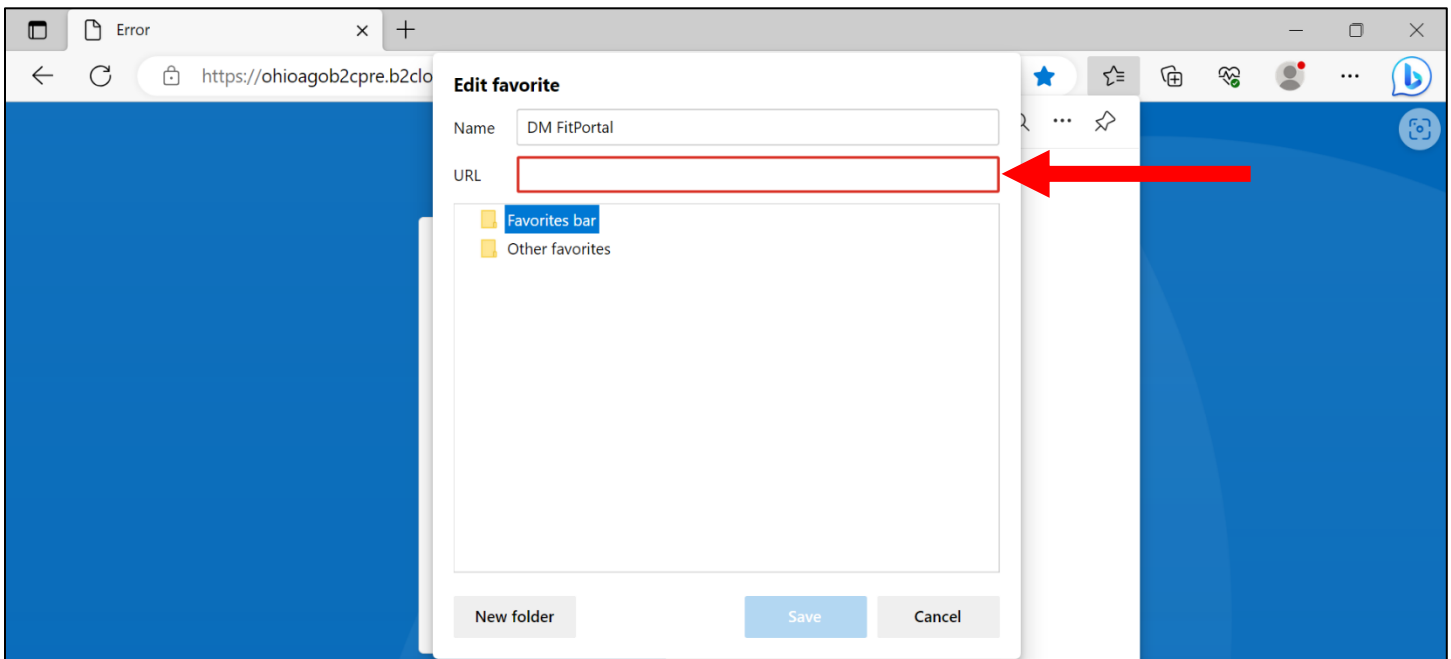
1. Use the ellipses **...** in the toolbar to open the browser menu. Select **Favorites**.



2. Right-click on the saved URL and select **Edit**.

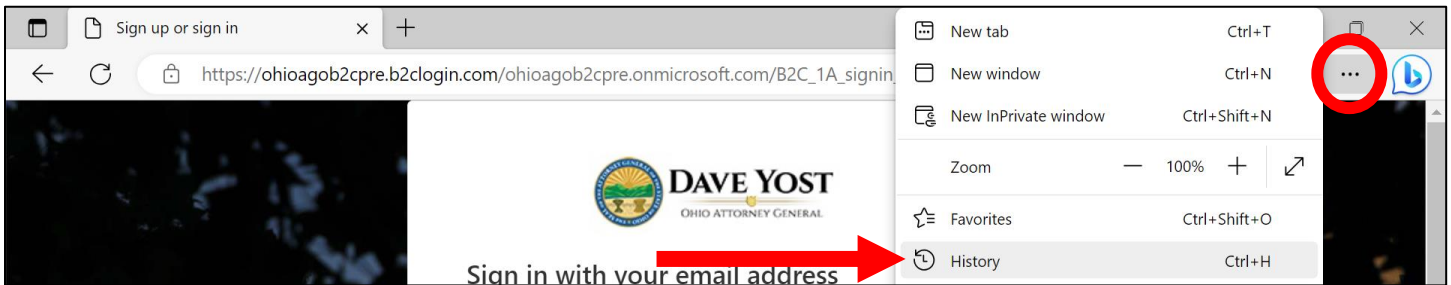


3. Delete the authentication login URL and paste the correct portal link in the field. Click **Save**.

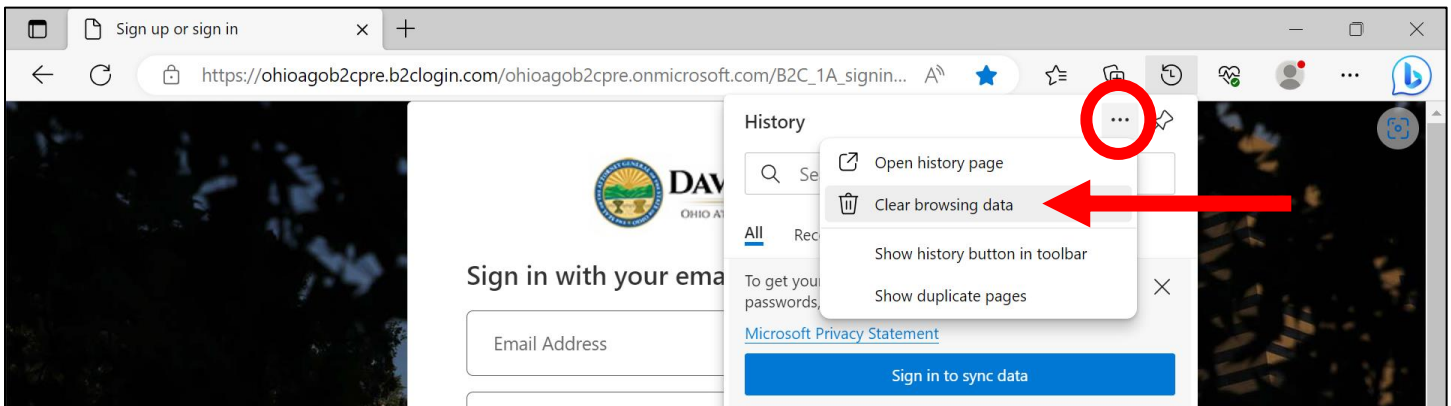


## How to Clear History/Cache in Microsoft Edge

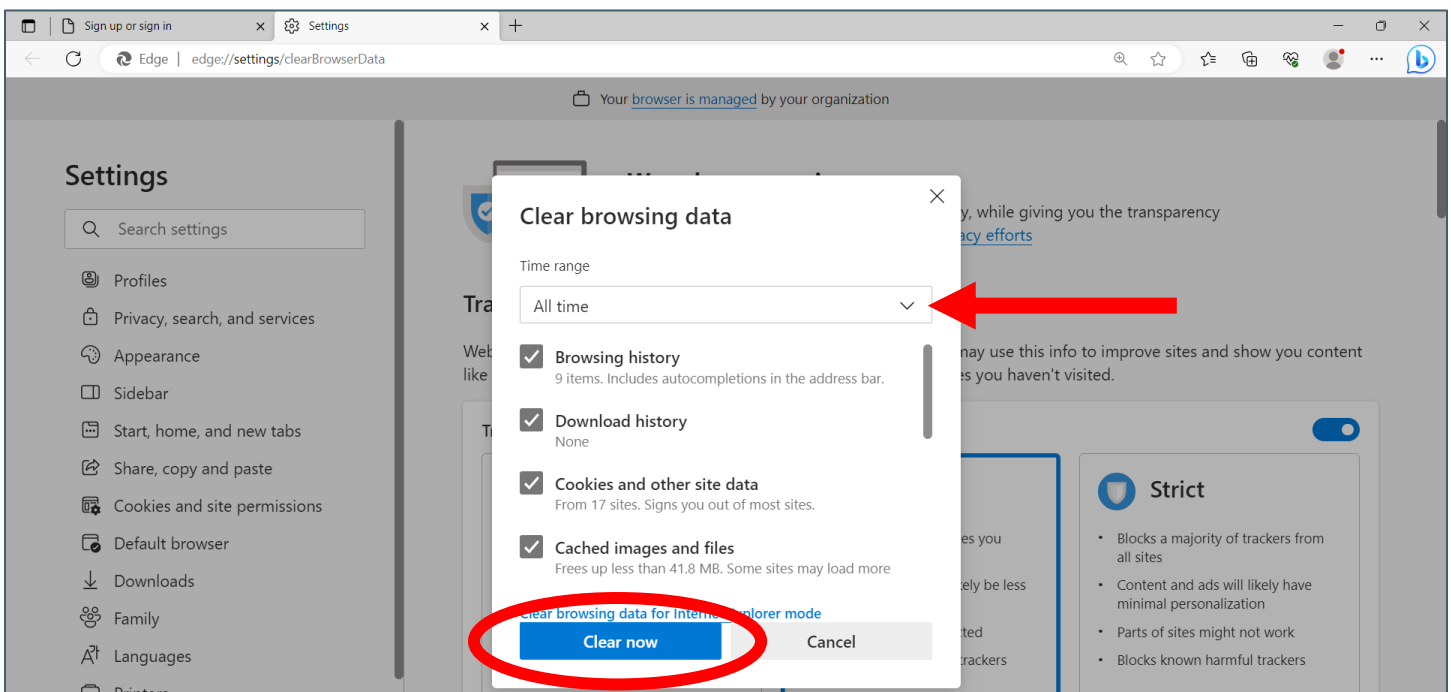
1. Use the ellipses **...** in the browser toolbar to open the browser menu. Select **History**.



2. Select the ellipses on the History menu and select **Clear browsing data**.



3. Confirm the Time range is **All time**. Select **Clear now**.



# Landing Page – Reports

Access reports that are set up on scheduled delivery and reports that have been manually generated by expanding the **Reports** drop-down.

The screenshot displays the 'Debt Manager FitPort' interface. On the left, a navigation menu includes 'Messages', 'View Reports', 'Reports', and 'Financials'. The 'Reports' section is expanded, showing a dropdown menu with 'ALL' selected. The main content area features the 'Generate Reports' section, which includes a dropdown menu for 'Creditor\_Receiver\_Inventory\_Report'. Below this, there are four date input fields: 'Account Placement Date >=' and 'Account Placement Date <=' (both with 'mm/dd/yyyy' format and calendar icons), and 'Forward Date >=' and 'Forward Placement Date <=' (both with 'mm/dd/yyyy' format and calendar icons). A 'Generate Report' button is located at the bottom right of the form. The interface also includes logos for 'DAVE YOST OHIO ATTORNEY GENERAL' and 'CARES Collections Account Resolution & Enforcement System'.

Payment reports that correspond with invoicing periods are delivered in the Financials drop-down. These cannot be generated on-demand.

Run reports ad-hoc with custom parameters at any time. Reports will be delivered to the **View Reports** section in about 5 minutes.

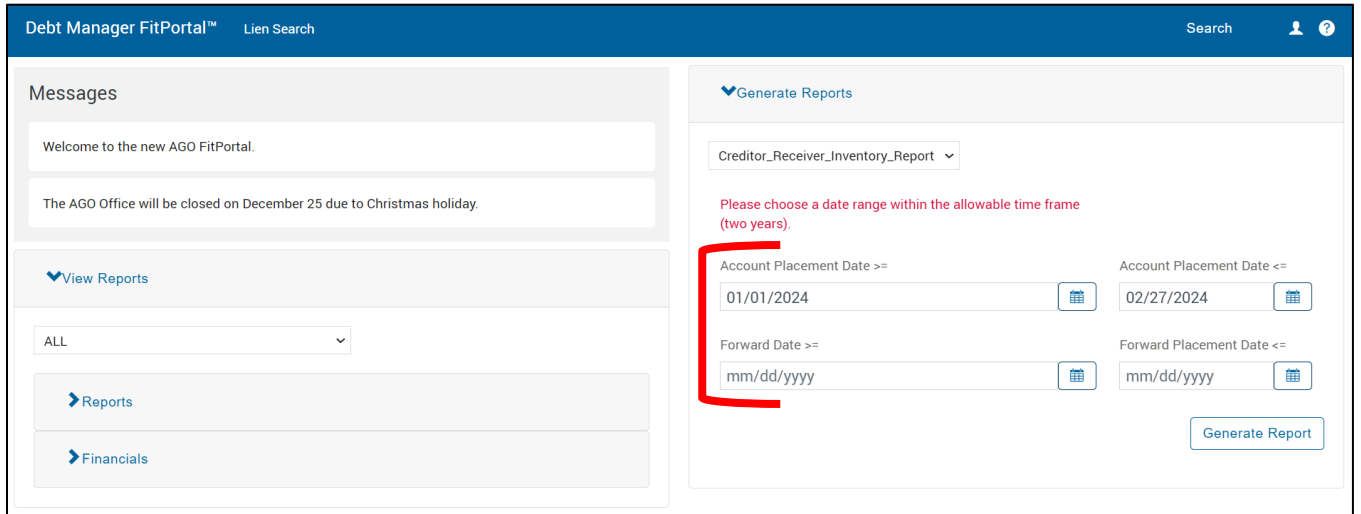
## Available Creditor Reports

For Manager role only

Report Name	Description
Inventory	Details for each account for all client IDs you have access to, including tags, forwarding information, original balance, current balance, amounts collected, and last payment date
Yearly Spindown	Shows the amount collected on accounts each year, based on the age of placement
Account Status	A list of accounts by placement date, showing tags amount collected, current and original balance
Account Tag Summary	For each tag, the number of accounts belonging to a client ID that are associated to the tag, account original balance, current balance, and amount collected are provided
History Analysis	Summary view of new business certified, collections and commissions on those accounts, and number of returned accounts
Monthly Spindown	Shows the amount collected on accounts each month, based on the age of placement
Paid in Full	Accounts in PIF status, provides placement date, original balance, and PIF date
<b>Financials</b>	
Only available once invoices are generated by AGO Accounting	
Invoices	An itemization of the amount being remitted to your office for each invoicing period; account information for payments received and details about how the payment was allocated are provided

## Running Reports

1. For reports that can be generated ad-hoc, select the report parameters in the **Generate Reports** section.



Debt Manager FitPortal™ Lien Search Search

Messages

Welcome to the new AGO FitPortal.

The AGO Office will be closed on December 25 due to Christmas holiday.

View Reports

ALL

Reports

Financials

Generate Reports

Creditor\_Receiver\_Inventory\_Report

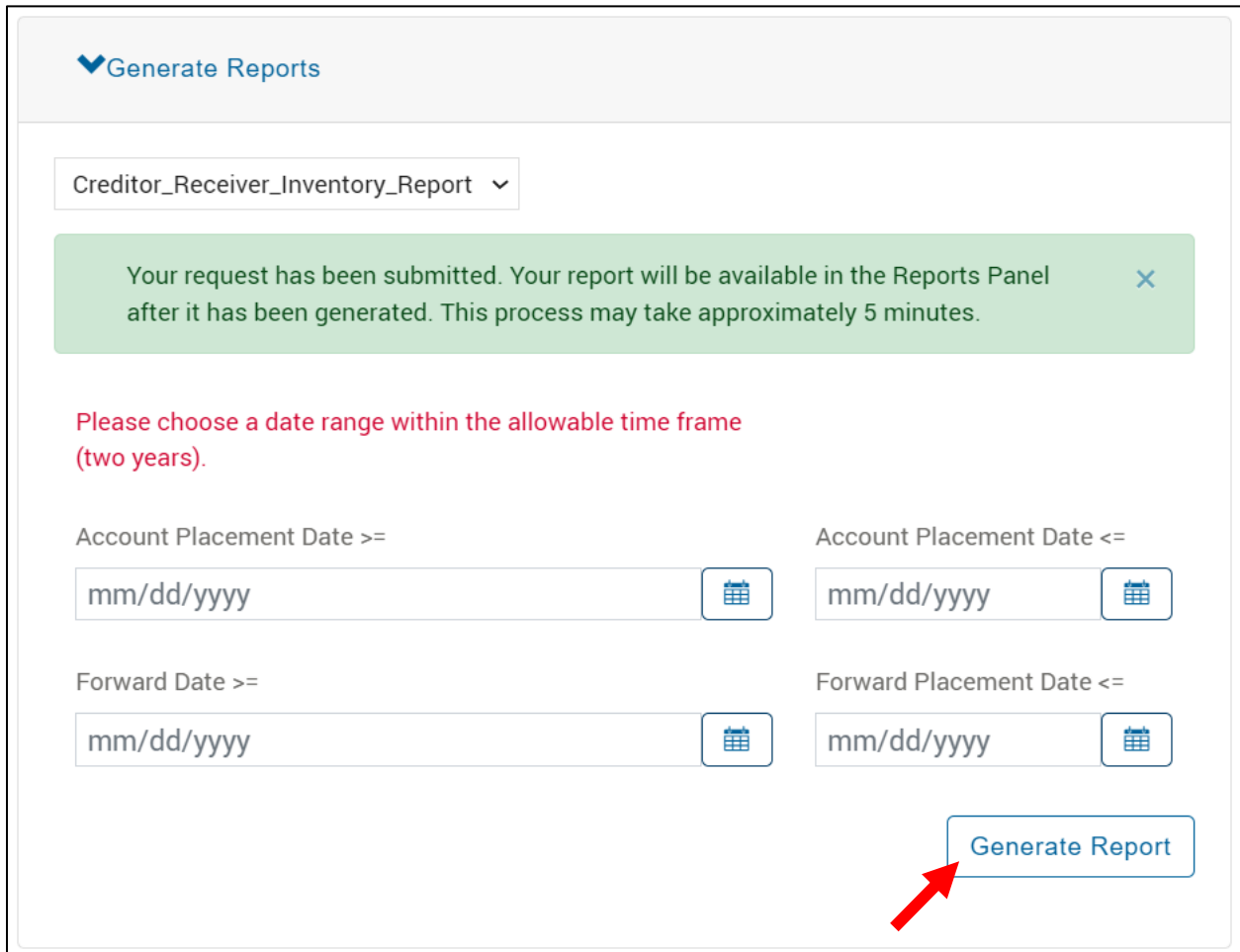
Please choose a date range within the allowable time frame (two years).

Account Placement Date >= 01/01/2024 Account Placement Date <= 02/27/2024

Forward Date >= mm/dd/yyyy Forward Placement Date <= mm/dd/yyyy

Generate Report

2. Click **Generate Report**. A notice will indicate the successful request of the report and direct you to retrieve it in the Reports panel.



Generate Reports

Creditor\_Receiver\_Inventory\_Report

Your request has been submitted. Your report will be available in the Reports Panel after it has been generated. This process may take approximately 5 minutes.



Please choose a date range within the allowable time frame (two years).

Account Placement Date >= mm/dd/yyyy Account Placement Date <= mm/dd/yyyy

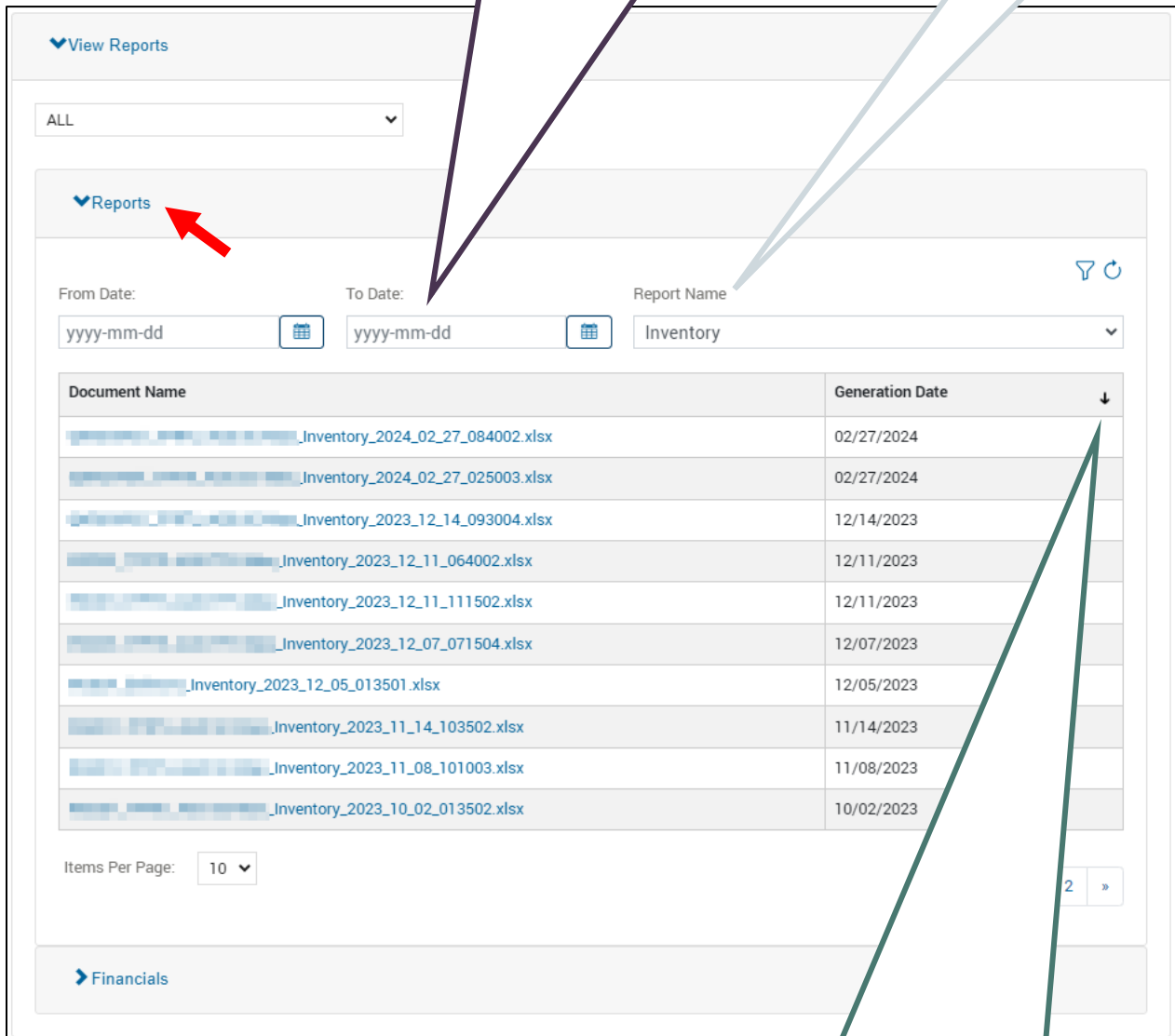
Forward Date >= mm/dd/yyyy Forward Placement Date <= mm/dd/yyyy

Generate Report

3. Check the **View Reports** section and expand the **Reports**. Utilize the refresh and filter/sort options to view the most recently added reports.

To use the Date filter, first enter the From Date field using the calendar icon. Next, enter the To Date field. Then click the filter icon  to apply the filter. To remove the date filter, use the refresh icon .

If using the Report Name filter, the drop-down will have to be set to blank to remove the filter.




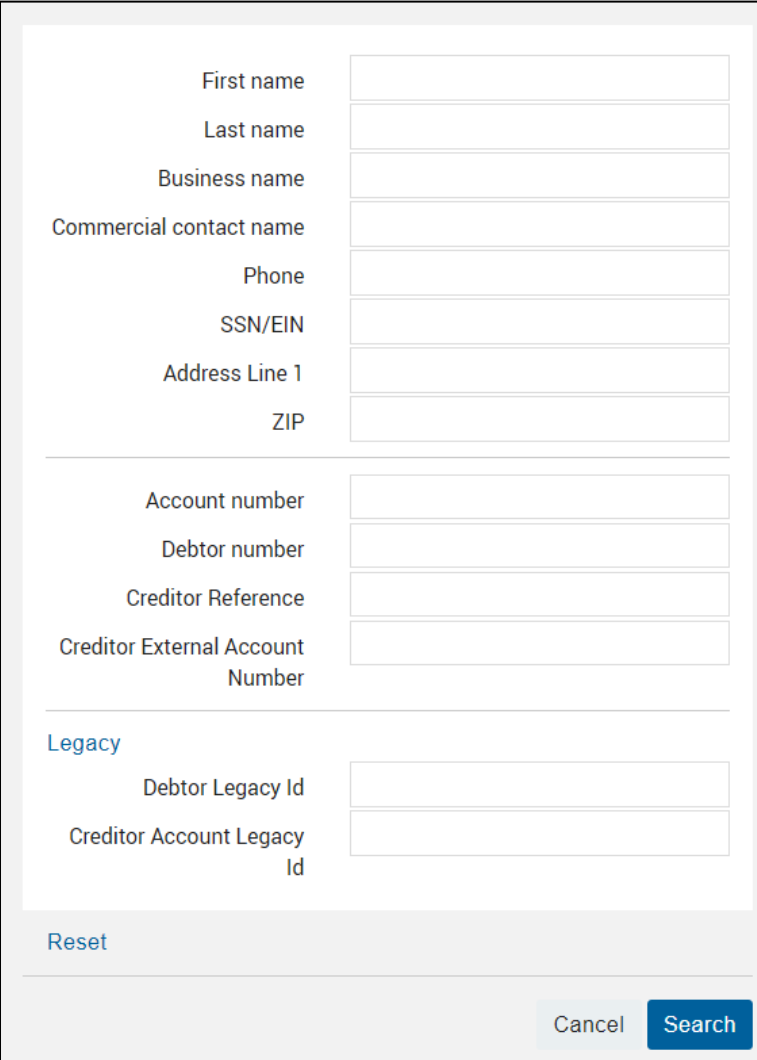
The screenshot shows the 'View Reports' section of a software interface. At the top, there is a 'View Reports' header with a dropdown menu set to 'ALL'. Below this is a 'Reports' section, indicated by a red arrow. The 'Reports' section contains filters for 'From Date' and 'To Date' (both with calendar icons) and a 'Report Name' dropdown menu set to 'Inventory'. To the right of these filters are icons for a filter (funnel) and a refresh (circular arrow). Below the filters is a table with two columns: 'Document Name' and 'Generation Date'. The table lists several reports with their respective generation dates, sorted from most recent to oldest. A green arrow points to the sort arrow icon in the 'Generation Date' column header. At the bottom of the table, there is a pagination control showing 'Items Per Page: 10' and a page number '2' with a right arrow.

Document Name	Generation Date
Inventory_2024_02_27_084002.xlsx	02/27/2024
Inventory_2024_02_27_025003.xlsx	02/27/2024
Inventory_2023_12_14_093004.xlsx	12/14/2023
Inventory_2023_12_11_064002.xlsx	12/11/2023
Inventory_2023_12_11_111502.xlsx	12/11/2023
Inventory_2023_12_07_071504.xlsx	12/07/2023
Inventory_2023_12_05_013501.xlsx	12/05/2023
Inventory_2023_11_14_103502.xlsx	11/14/2023
Inventory_2023_11_08_101003.xlsx	11/08/2023
Inventory_2023_10_02_013502.xlsx	10/02/2023

Click the sort arrow on the Generation Date column so the most recently requested report is at the top of the list.

# Search

Click on the search button  from the top banner to display all search options.



Search form fields:

- First name
- Last name
- Business name
- Commercial contact name
- Phone
- SSN/EIN
- Address Line 1
- ZIP
- Account number
- Debtor number
- Creditor Reference
- Creditor External Account Number
- Legacy
  - Debtor Legacy Id
  - Creditor Account Legacy Id

Buttons: [Reset](#), [Cancel](#), [Search](#)

## Search Field Descriptions

Field	Description or CUBS Equivalent
Account Number	Debt Manager-assigned number for each account
Debtor Number	Debt Manager-assigned number for each debtor
Creditor Reference	CRN – assigned by Creditor
Creditor External Account Number	DRL – assigned by Creditor
Debtor Legacy ID	CUBS lead packet number
Creditor Account Legacy ID	CUBS account number

## Wildcard Search

For alpha or alphanumeric fields, an **\*** or **%** can be used in place of unknown information.


For example, the search below will provide back all debtors your user role has permission to see:

Last name	*
-----------	---

A wildcard symbol can also stand in to fill for incomplete information. The search below will provide any debtors your user role has permission to view whose address includes “Main”. This would help in instances where the street number is unknown or there is a need to eliminate inconsistent abbreviation issues.

Address Line 1	*Main*
----------------	--------

Wildcard searches cannot be performed on numeric fields, like SSN, Account Number, or Debtor Number.

 <b>Error.</b> The Account number is not valid.	
Account number	*



## Search Results

If only one account meets the search criteria, the Agent Console for the debtor will display.

If more than one account meets the search criteria, the Search Results screen will allow you to view all results and select an account to open.

Click the account number hyperlink to select the account to view.

Showing results for Last name: GOODALL, JANE (100364322) 6 items found Page 1 of 2

GOODALL, JANE (100364322) Workgroup Training Workgroup  
SSN XXX-XX-0000 DOB Phone 614-555-4444 Address COLUMBUS, OH

Account	Ownership	Creditor	Creditor External Account #	Balance
<a href="#">300216016</a>	Primary	TRAINING CREDITOR	DRL105	\$4,474.38

GOODALL, JANE (100364322) Workgroup Training Workgroup  
SSN XXX-XX-0006 DOB Phone 614-555-4444 Address COLUMBUS, OH

Account	Ownership	Creditor	Creditor External Account #	Balance
<a href="#">300216033</a>	Primary	TRAINING CREDITOR	DRL100	\$2,800.89










GOODALL, JANE (100364322) Workgroup Training Workgroup  
SSN XXX-XX-0006 DOB Phone 614-555-4444 Address COLUMBUS, OH

Account	Ownership	Creditor	Creditor External Account #	Balance
<a href="#">300216036</a>	Primary	TRAINING CREDITOR	DRL101	\$9,924.41

Page 1 of 2

# General Navigation

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		Expand/collapse the navigation panel
	Agent Console	Debtor contact information & tags Account identifiers & balance information Adding & viewing notes
	Documents	View associated documents Upload new documents
	Communication Center	View & print AGO-sent notices, including lien releases
	Financial Center	View bucket balances, payments, adjustments, charges and payment plan or settlement details
	Debtor Profile	Additional debtor demographic information
	Related Persons	Additional points of contact for the debtor, such as Attorneys, Authorized Representatives, and alternate addresses
	User Defined Pages	(UDPs) AGO-designed forms to provide or exchange information, such as certification reasons and bankruptcy case information
	Custom Cards	Deceased debtor information

# Agent Console

## Overview

Debtor contact information, tags, and total amount paid remain the same, regardless of which of the debtor's accounts is being viewed.

The screenshot displays the Agent Console interface for a debtor. At the top, it shows the debtor's name and account number: "Debtor 100364322 : JANE GOODALL ... Account : 300216016". Below this, a banner contains creditor information: "Creditor Reference: CRN0985 | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$937.10". The main content is divided into two sections: "Account and Payment Arrangement" and "Historical Events".

**Account and Payment Arrangement**

Account 300216016 \*\*\*

TRAINING CREDITOR  
Creditor External Account #  
DRL105

Payoff Balance \$4,476.21  
Last payment of \$100.00 on 12/15/2023

Interest simple 5.0000%  
Interest paid to date \$0.00

[Check Offers](#)

[View all Accounts \(6\)](#)

**Historical Events**  Display Action and Result code columns

Date and Time	Action Code	Result Code	Account	Notes	User
12/18/2023 01:25 PM	RcvdMesg	RcvdMesg		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear!}}	TPRTL.AGO.Cred_Man
12/18/2023 12:43 PM	RcvdMesg	RcvdMesg		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear!}}	TPRTL.AGO.Cred_Man
12/18/2023	AcSCEvt	RcSCEV		User retrieved Debtor:	TPRTL.AGO.Cred_Man

These sections only display information specific to the account currently being viewed.

Information in the banner includes Creditor-provided identifiers, CUBS number, and account placement date.

The Account and Payment Arrangement section will show the current payoff balance and existing settlement offers or payment plan details.

All account and debtor notes.

Details for adding notes can be found [here](#).


## Updating Debtor Contact Information



### Edit Address, Phone Numbers, or Email

1. On the Agent Console, select the Debtor ID Card icon  next to the debtor name.

Agent Console

 Debtor 100364322 : JANE GOODALL ...  
Account : 300216016

Funds ... Clear

Creditor Reference: CRN0985 | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$937.10

**Account and Payment Arrangement** [View all Accounts \(6\)](#)

Account 300216016 ...

TRAINING CREDITOR  
Creditor External Account #  
DRL105

Payoff Balance \$4,476.21  
Last payment of \$100.00 on  
12/15/2023

Interest simple 5.0000%  
Interest paid to date \$0.00

[Check Offers](#)

**Historical Events**  Display Action and Result code columns

Date and Time	Account	Notes	User
12/18/2023 12:02 PM		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear!}}	TPRTL.AGO.Cred_Man
12/18/2023 09:59 AM		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear!}}	TPRTL.AGO.Cred_Man
12/18/2023 09:59 AM	300216016	User retrieved Account: 300216016	TPRTL.AGO.Cred_Man
12/18/2023 09:59 AM		User retrieved Debtor: 100364322	TPRTL.AGO.Cred_Man

2. Select the ellipses  next to an existing piece of information to Edit or Remove.

Identification And Verification ✕

**JANE GOODALL** ...

Middle name

DOB

SSN XXX-XX-0006

**Address** ...

200 GORILLA BLVD  
COLUMBUS, OH 42222  
United States

[Confirm](#)

**Email**

[Add](#)

**Home** ...

614-555-4444

[Add phone number](#)

[Confirm](#)

[Close](#)

New information can be added by selecting the **Add** button.

The **Confirm** button will timestamp the last time the information was validated.

### Identification And Verification

**JANE GOODALL**

Middle name

DOB

SSN XXX-XX-0006

Address

200 GORILLA BLVD  
COLUMBUS, OH 42222  
United States

Email

?

Confirm Add

Home

614-555-4444

?

Confirm

+  
Add phone number

Close

Note: Only the Creditor Manager role has permission to update the debtor name and date of birth.

Updates made to this card will be logged in the Historical Events.

### Agent Console

**Debtor 100364322 : JANE GOODALL**  
Account : 300216016

Funds Waiting to Clear

Creditor Reference: CRN0985 | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$937.10

#### Account and Payment Arrangement

Account 300216016

TRAINING CREDITOR  
Creditor External Account #  
DRL105

Payoff Balance **\$4,476.21**  
Last payment of \$100.00 on  
12/15/2023

Interest simple 5.0000%  
Interest paid to date \$0.00

Check Offers

#### Historical Events

Display Action and Result code columns

Date and Time	Account	Notes	User
12/18/2023 12:19 PM		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear}}	TPRTL.AGO.Cred_Man
12/18/2023 12:16 PM		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear}}	TPRTL.AGO.Cred_Man
12/18/2023 12:16 PM		Confirmed Debtor email. Details: {Last Name=GOODALL, First Name=JANE, SSN=0006, Email=jgood@email.com, Debtor Language={UNKNOWN}, Behavioral Score=0, Debtor Marital Status={UNKNOWN}}	TPRTL.AGO.Cred_Man
12/18/2023 12:16 PM		Saved Debtor. Details: {Last Name=GOODALL, First Name=JANE, SSN=0006, Email=jgood@email.com, Debtor Language=	TPRTL.AGO.Cred_Man

Payment/Promise - Rapid Understanding Zone

## Historical Events

Notes are recorded by selecting an action code and a result code, resulting in an 'AR event'.

A table of available action and result code (AR) combinations are provided on [page 25](#).

Notes where an account number does not display are debtor-level events – anyone with access to any account belonging to this debtor can view them. Account-level notes are only viewable to those with access to the account.

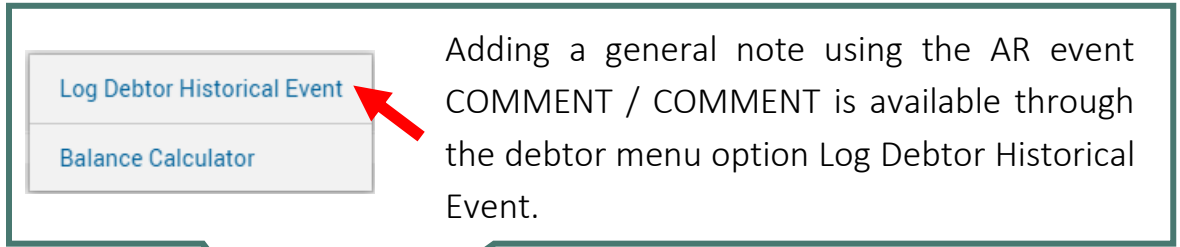
Date and Time	Account	Notes	User
12/20/2023 01:17 PM		Placing notice request. Template: LTPYSMAC, Document Template Short Name: LTPYSMAC, Regarding Debtor number: 100364322, Requester name: LTrujillo, Request Date: 12/20/23, Print Type: Internal, Recipient Id: 100364322, Recipient Type: CONSUMER, Delivery Channel: PRINT	LTrujillo
12/20/2023 01:16 PM		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear!}}	TPRTL.AGO.Cred_Man
12/20/2023 01:16 PM		Placing notice request. Template: LTTR21, Document Template Short Name: LTTR21, Regarding Debtor number: 100364322, Requester name: LTrujillo, Request Date: 12/20/23, Print Type: Internal, Recipient Id: 100364322, Recipient Type: CONSUMER, Delivery Channel: PRINT	LTrujillo
12/20/2023 01:14 PM		User retrieved Debtor: 100364322	TPRTL.AGO.Cred_Man
12/20/2023 01:14 PM	300216016	User retrieved Account: 300216016	TPRTL.AGO.Cred_Man
12/20/2023 01:14 PM		CONTACTED JANE FOR PAYMENT PLAN INFORMATION	LTrujillo
12/20/2023 01:13 PM		{614-555-4444 - Home} SPOKE WITH JANE, WOULD LIKE TO BE CONTACTED AT END OF MONTH TO SET UP PAYMENT PLAN	LTrujillo
12/20/2023 01:12 PM		Debtor lock overridden.	LTrujillo
12/20/2023 01:12 PM		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear!}}	LTrujillo
12/20/2023 01:12 PM		User retrieved Debtor: 100364322 through search operation.	LTrujillo

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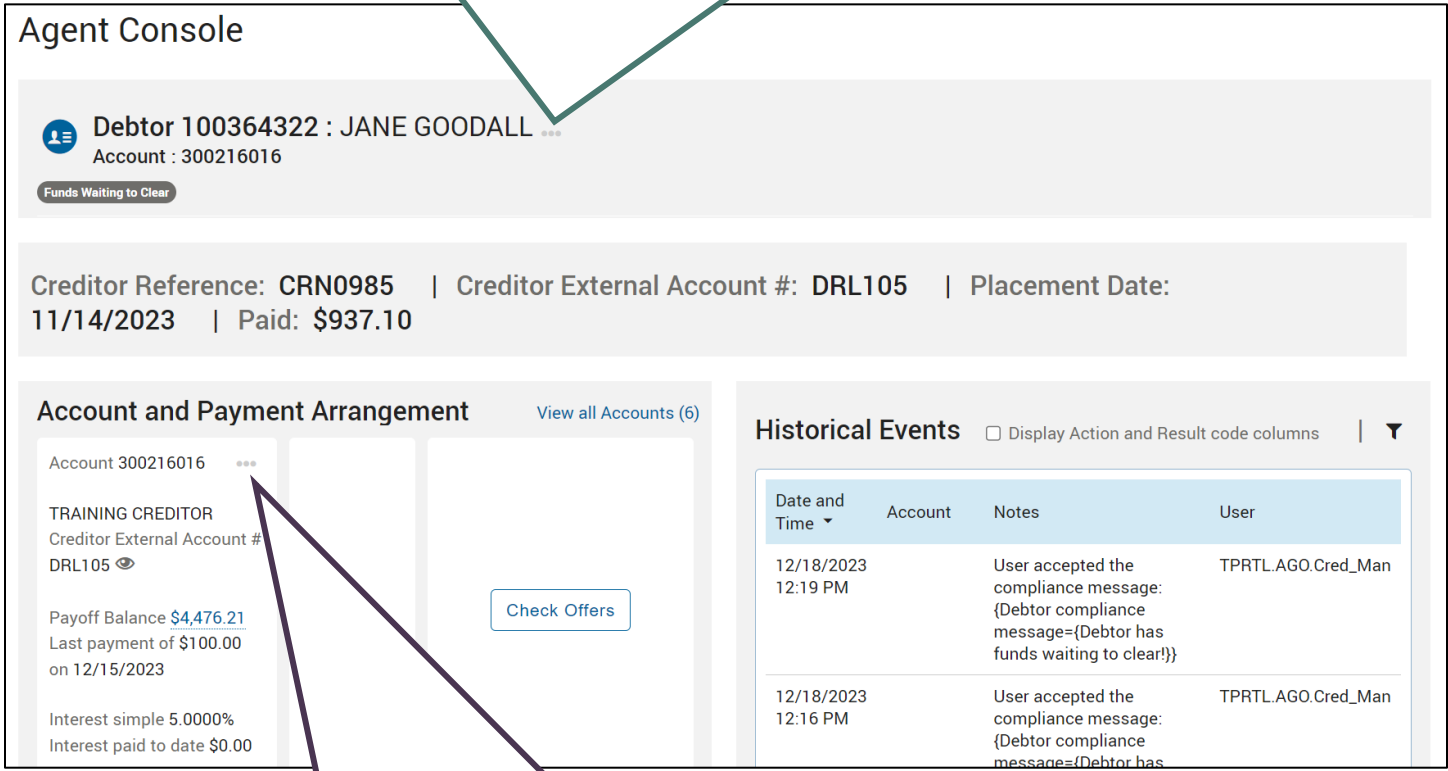
Ten rows of notes will display at a time. Use the filter to look for a specific date range or use the arrows to page through.

## Adding a Note

From the Agent Console, there are two menus that allow notes to be added to the Historical Events.



Adding a general note using the AR event COMMENT / COMMENT is available through the debtor menu option Log Debtor Historical Event.



**Agent Console**

Debtor 100364322 : JANE GOODALL ...  
Account : 300216016  
Funds Waiting to Clear

Creditor Reference: CRN0985 | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$937.10

**Account and Payment Arrangement** [View all Accounts \(6\)](#)

Account 300216016 ...

TRAINING CREDITOR  
Creditor External Account # DRL105

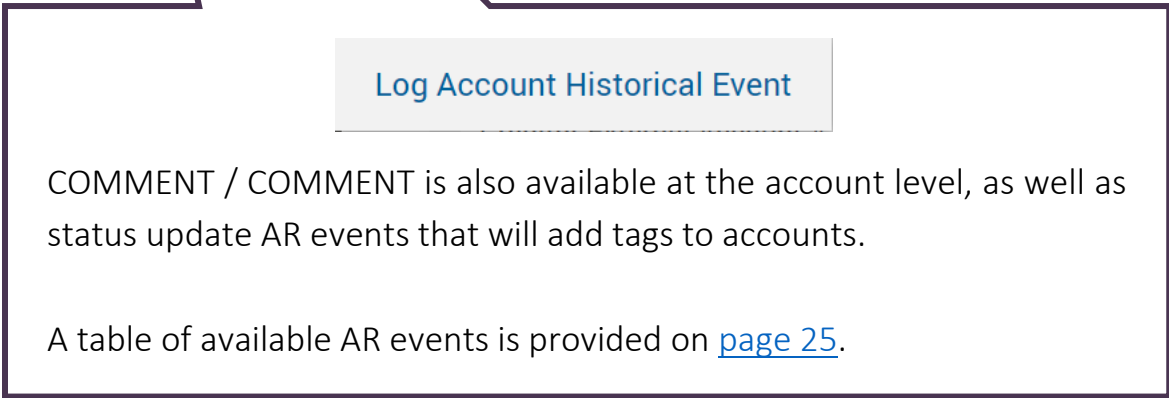
Payoff Balance [\\$4,476.21](#)  
Last payment of \$100.00 on 12/15/2023

Interest simple 5.0000%  
Interest paid to date \$0.00

[Check Offers](#)

**Historical Events**  Display Action and Result code columns

Date and Time	Account	Notes	User
12/18/2023 12:19 PM		User accepted the compliance message: {Debtor compliance message={Debtor has funds waiting to clear!}}	TPRTL.AGO.Cred_Man
12/18/2023 12:16 PM		User accepted the compliance message: {Debtor compliance message={Debtor has	TPRTL.AGO.Cred_Man



[Log Account Historical Event](#)

COMMENT / COMMENT is also available at the account level, as well as status update AR events that will add tags to accounts.

A table of available AR events is provided on [page 25](#).

1. Open either the debtor menu or account menu option and select **Log Historical Event**.
2. Select **Search** (or choose a previously favorited combination).

New Debtor Historical Event

Select Action & Result Code or [Search](#)

Please search for an AR Event to enable comment box

Cancel Log Event

3. Select an Action Code to narrow the available Result Codes to select. Click **Done**.

Action & Result Code Search

Action Codes

Short name Description

COMMENT Comment

Result Codes

Short name Description

COMMENT Comment


Cancel Done

4. Enter the note into the text field and click **Log Event**.

Note: Favorite an AR event by selecting the star icon  to pin it to the event selection list for future notes.

New Debtor Historical Event

Select Action & Result Code or [Search](#)

COMMENT - COMMENT 

Enter comment

Log event for linked duplicate records of this Debtor

Cancel Log Event



## Creditor AR Events

Debtor-level AR Events	
COMMENT / COMMENT	Add general notes to all the debtor's accounts

Account-level AR Events	
COMMENT / COMMENT	Add general notes to the account
CRDUPDT / ACTDUTY	Adds Active Duty <b>debtor</b> tag
CRDUPDT / ACTDUTY	Adds Returned <b>account</b> tag
CRDUPDT / DECEASED	Adds Deceased <b>debtor</b> tag
CRDUPDT / DISPUTE	Adds Dispute <b>account</b> tag
CRDUPDT / FRAUDHLD	Adds Fraud Hold <b>account</b> tag
CRDUPDT / INCARCTD	Adds Incarcerated <b>debtor</b> tag

## Viewing Settlements or Payment Plans

If the account currently being viewed has a settlement offer or payment plan, details of the plan will display next to the account details.

Pending settlement offers, including any counter offers will display.

### Account and Payment Arrangement

[View all Accounts \(13\)](#)

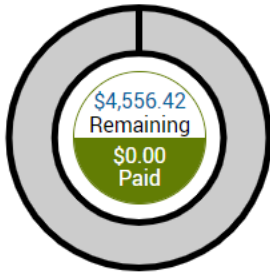
Forward

<p>Account 300216035 <span style="float: right;">...</span></p> <p>TRAINING CREDITOR Creditor External Account # DRL-XYZ <span style="font-size: 0.8em;">👁</span></p> <p>Payoff Balance <span style="color: blue;">\$1,110.75</span> No payments to date</p> <p>Interest simple 8.0000% Interest paid to date \$0.00</p>		<div style="background-color: #f8d7da; padding: 5px; border: 1px solid #f5c6cb; display: flex; align-items: center;"> <span style="color: #dc3545; font-weight: bold; margin-right: 5px;">!</span> Pending approval         </div> <p>Settlement offer Sent 04/26</p> <p>Amount \$888.60 (80%) Discount \$222.15 (from \$1,110.75)</p> <p>1 instance of \$888.60 on 04/30 Promise to pay Payment due 04/30</p>
--	--	--

Payment plans and approved settlement offers will display expected payment details.

### Account and Payment Arrangement

[View all Accounts \(6\)](#)

<p>Account 300216016 <span style="float: right;">...</span></p> <p>TRAINING CREDITOR Creditor External Account # DRL105 <span style="font-size: 0.8em;">👁</span></p> <p>Payoff Balance <span style="color: blue;">\$4,395.99</span> Last payment of \$100.00 on 12/15/2023</p> <p>Interest simple 8.0000% Interest paid to date \$0.00</p>	<p><b>\$250.00</b> Due 04/26/2024</p>	<p>Promise Schedule 74 Paying monthly Total installments 13 for \$4,556.42</p> <div style="display: flex; align-items: center; justify-content: center;">  <table style="margin-left: 20px; border-collapse: collapse;"> <tr><td>Paid</td><td>0</td></tr> <tr><td>Broken</td><td>0</td></tr> <tr><td>Canceled</td><td>0</td></tr> <tr><td>Future</td><td>13</td></tr> </table> </div>	Paid	0	Broken	0	Canceled	0	Future	13
Paid	0									
Broken	0									
Canceled	0									
Future	13									

## Viewing Additional Accounts Owed by Debtor

If the debtor has other accounts, they can be viewed by clicking the **View all Accounts** hyperlink.

Agent Console

Debtor 100364322 : JANE GOODALL ...  
Account : 300216016  
Attorney

Creditor Reference: CRN0985 | Creditor Legacy ID | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$937.10

Account and Payment Arrangement View all Accounts (6)

Account 300216016  
TRAINING CREDITOR  
Creditor External Account #  
DRL105  
Payoff Balance \$4,504.90  
Last payment of \$100.00 on 12/15/2023  
Interest simple 8.0000%  
Interest paid to date \$0.00  
[Check Offers](#)

Historical Events  Display Action and Result code columns

Date and Time	Account	Notes	User
01/22/2024 10:52 AM		User accepted the compliance message: (Debtor compliance message=(Debtor has an Attorney))	TPRTL.AGO.Cred_Man
01/19/2024 03:57 PM	300216016	Yearly Int Rate Update Script Changed Rate From 5.000 to 8.000.	root
01/19/2024 03:41 PM		Saved Debtor Tag. Details: {Tag Assign Date=1/19/24, Tag={name=Attorney, short name=ATTORNEY, type={description=Debtor Status}}	NRaymond
01/19/2024 11:31 AM	300216016	User retrieved Account: 300216016	TPRTL.AGO.Cred_Man

The debtor-level balance (total of all accounts).

Agent Console

Debtor 100364322 : JANE GOODALL ...  
Account : 300216016  
Attorney

Creditor Reference: CRN0985 | Creditor Legacy ID | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$937.10

Account and Payment Arrangement Hide all Accounts (6)

6 Accounts for \$18,590.18 Tags

Account	Payoff balance
Account 300216041	Payoff balance \$0.00 <i>Not part of Debtor balance</i>
Account 300216043	Payoff balance <u>\$400.40</u>
Account 300216039	Payoff balance <u>\$2,825.00</u>
Account 300216033	Payoff balance <u>\$2,825.00</u>

Historical Events  Display Action and Result code columns

Date and Time	Account	Notes	User
01/22/2024 10:52 AM		User accepted the compliance message: (Debtor compliance message=(Debtor has an Attorney))	TPRTL.AGO.Cred_Man
01/19/2024 03:57 PM	300216016	Yearly Int Rate Update Script Changed Rate From 5.000 to 8.000.	root
01/19/2024 03:41 PM		Saved Debtor Tag. Details: {Tag Assign Date=1/19/24, Tag={name=Attorney, short name=ATTORNEY, type={description=Debtor Status}}	NRaymond
01/19/2024 11:31 AM	300216016	User retrieved Account: 300216016	TPRTL.AGO.Cred_Man

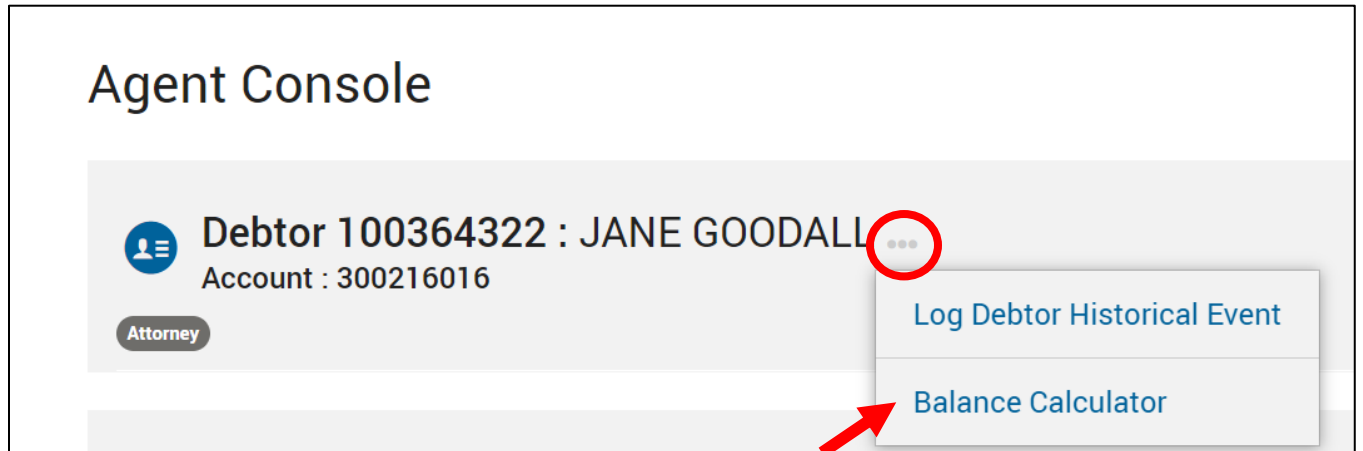
Navigate to another account by clicking the account number hyperlink.

## Balance Calculation Tool

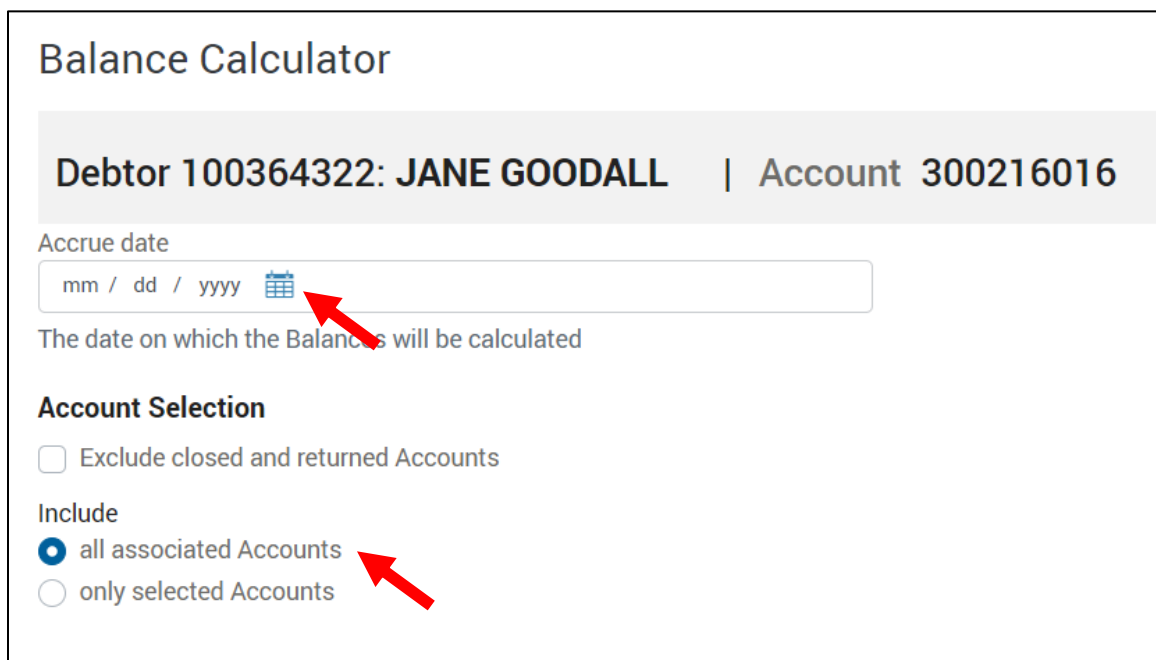


### Project collection balance for account(s)

1. From the debtor menu on the Agent Console, select **Balance Calculator**.



2. Select a date and determine which accounts to be included in the projection.




3. Once a date is selected, the projection will populate below.

Total daily interest across all selected accounts.

### Aggregate of Accounts

Calculated Balance	\$18,663.68
Daily interest	\$3.62



- PrincipalCertified \$16,534.09
- AGInterest \$432.90
- CourtCostCertified \$0.00
- AGFee \$1,696.69
- CreditorInterestCertified \$0.00
- PenaltyCertified \$0.00
- RestitutionCertified \$0.00
- FwdFee \$0.00
- NSFFee \$0.00

### Account Balances

Account	Creditor	Creditor External Account #	Calculated Balance	
300216016	TRAINING CREDITOR	DRL105	\$4,370.78	>
300216033	TRAINING CREDITOR	DRL100	\$2,866.64	>
300216036	TRAINING CREDITOR	DRL101	\$10,157.40	>
300216039	TRAINING CREDITOR	DRL102	\$862.50	>
300216041	TRAINING CREDITOR	DRL103		>

1 - 5 of 6 items

Page 1 of 2

Individual account balance projections and daily interest are viewable by clicking the arrow in each row.

## Accessing Account Joint Owner

A joint owner is another debtor who can also be held responsible for the account balance owed. If a joint owner exists for an account, it will be indicated by an icon next to the account number.

**Account and Payment Arrangement** Hide all Accounts (6)

6 Accounts for \$17,875.89 Tags

Account 300216018	Account 300216024	Account 300216030	Account 300216042
TRAINING CREDITOR Creditor External Account # DRL-00-125	TRAINING CREDITOR Creditor External Account # DRL-00-126	TRAINING CREDITOR Creditor External Account # DRL-00-128	TRAINING CREDITOR Creditor External Account # DRL-00-124
Payoff balance <a href="#">\$1,053.96</a>	Payoff balance <a href="#">\$1,178.80</a>	Payoff balance <a href="#">\$1,220.39</a>	Payoff balance <a href="#">\$2,634.92</a>
<a href="#">Forward</a> <a href="#">New Certification</a>	<a href="#">Forward</a> <a href="#">New Certification</a>	<a href="#">Forward</a> <a href="#">New Certification</a>	<a href="#">Forward</a> <a href="#">New Certification</a>



The **primary** owner of the account is currently displayed on the Agent Console.



The **secondary** owner of the account is currently displayed on the Agent Console.

1. Click on the joint owner icon to display the co-debtor's name. Open the co-debtor of the account on the Agent Console by clicking the hyperlinked name.

Account 300216030 Co-owner(s)

[WENDY BIRD](#)  
Comaker

Account 300216030

# Documents

## Viewing Documents

1. Navigate to the Documents page.
2. Available documents are displayed. The link in the Document Name column can be clicked to download the document.

Documents




Debtor 100364322: JANE GOODALL | Account 300216016 | Creditor Reference: CRN0985 | Creditor External Account #: DRL105

▼ Documents

Select Document Class: All | From Date: yyyy-mm-dd | To Date: yyyy-mm-dd

	Document Name ↑	Document Class ↑	UserName ↑	Generation Date ↑
	<a href="#">Document.pdf</a>	CE Client Incoming	TPRTL.AGO.Cred_Man	12/20/2023
	<a href="#">Document.pdf</a>	CE Client Incoming	TPRTL.AGO.Cred_Man	12/20/2023
	<a href="#">Document.pdf</a>	CE Client Incoming	TPRTL.AGO.Cred_Man	12/20/2023

Items Per Page: 10

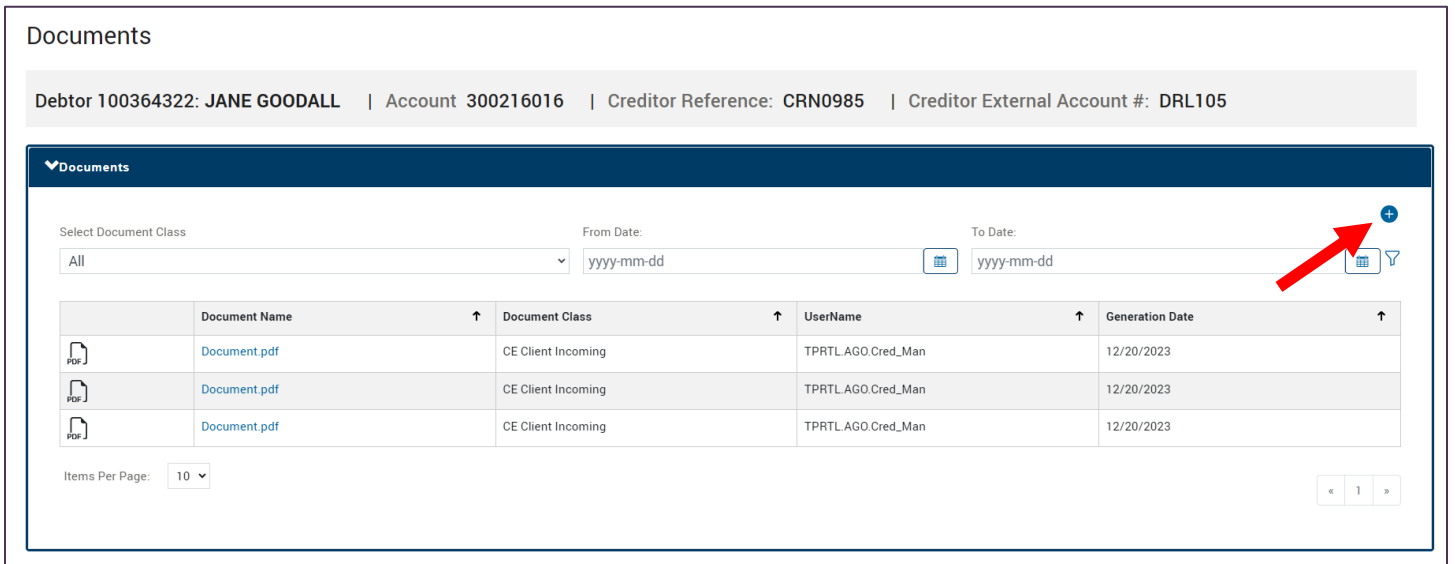
Similar to reports, a date range can be chosen by selecting the **From Date:** calendar icon , selecting the range, and clicking the filter icon  to apply the filter. The refresh icon  that appears can be used to remove the filter.

▼ Documents

Select Document Class: All | From Date: 2023-05-18 | To Date: 2023-05-26

## Uploading Documents

1. Select the plus icon  from the Documents page.






Documents

Debtor 100364322: JANE GOODALL | Account 300216016 | Creditor Reference: CRN0985 | Creditor External Account #: DRL105

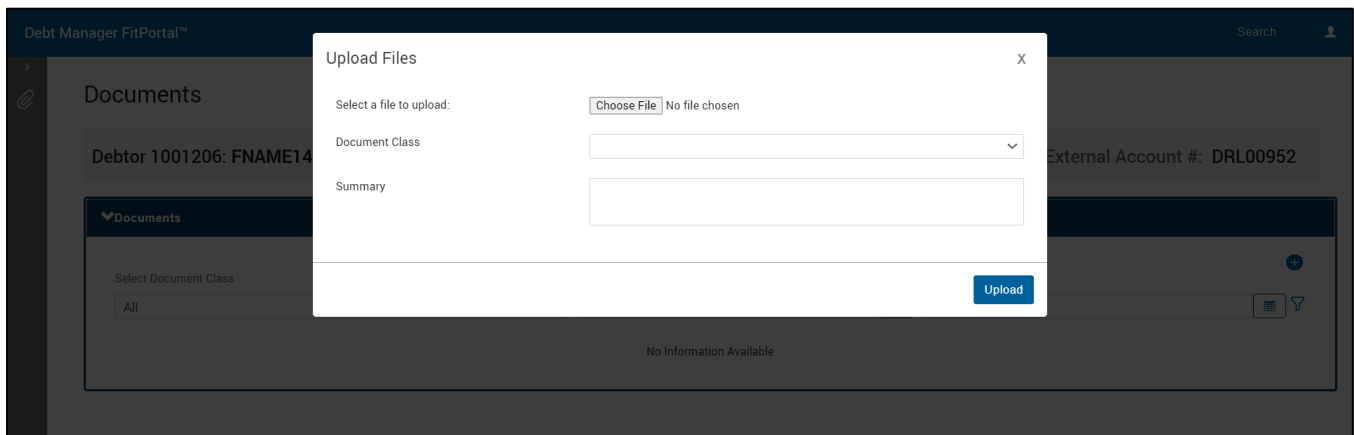
▼ Documents

Select Document Class: All | From Date: yyyy-mm-dd | To Date: yyyy-mm-dd

	Document Name ↑	Document Class ↑	UserName ↑	Generation Date ↑
	Document.pdf	CE Client Incoming	TPRTL AGO.Cred_Man	12/20/2023
	Document.pdf	CE Client Incoming	TPRTL AGO.Cred_Man	12/20/2023
	Document.pdf	CE Client Incoming	TPRTL AGO.Cred_Man	12/20/2023

Items Per Page: 10

2. Choose the file, select a document class, and provide a summary of the document being uploaded. Click **Upload**.



Debt Manager FitPortal™

Search

Documents

Debtor 1001206: FNAME14 | External Account #: DRL00952

Upload Files

Select a file to upload:  No file chosen

Document Class:

Summary:

No Information Available

Note: See [appendix](#) for acceptable file types and names to upload.



# Communication Center

A three-month timeline visual of system events that qualify will display in the Communication Heartbeat.

The screenshot displays the 'Communication Center' interface. At the top, it shows account information: 'Debtor 100287100: DEBTOR-0721 | Account Number: 294 | Creditor Reference: CR-0721-7987 | Creditor External Account #: DRL-0721-7987'. Below this is the 'Communication Heartbeat (Last 3 months)' section, which features a timeline from October to December. A yellow location pin icon is placed on the timeline for November. To the right of the timeline is a 'TODAY' marker and a 'Dates' toggle switch. Below the heartbeat are two panels: 'Verbal Communication' and 'Written Communication'. The 'Verbal Communication' panel shows a message from '(555-867-5309 - Home) left message test' dated '11/1 at 04:48 PM' and '1 month ago'. The 'Written Communication' panel is divided into 'Sent' and 'Pending' sections. The 'Sent' section contains two entries, both dated '9/20 at 04:09 PM' and '3 months ago'. Each entry includes a subject line: 'Printed notice request. Template: LTTR22, User: system' and a 'Print Da (...)' link. The 'Pending' section shows one entry dated '7/26 at 04:03 PM' and '4 months ago' with a similar subject line. A 'View all Historical Events' link is located at the top right of the communication logs.

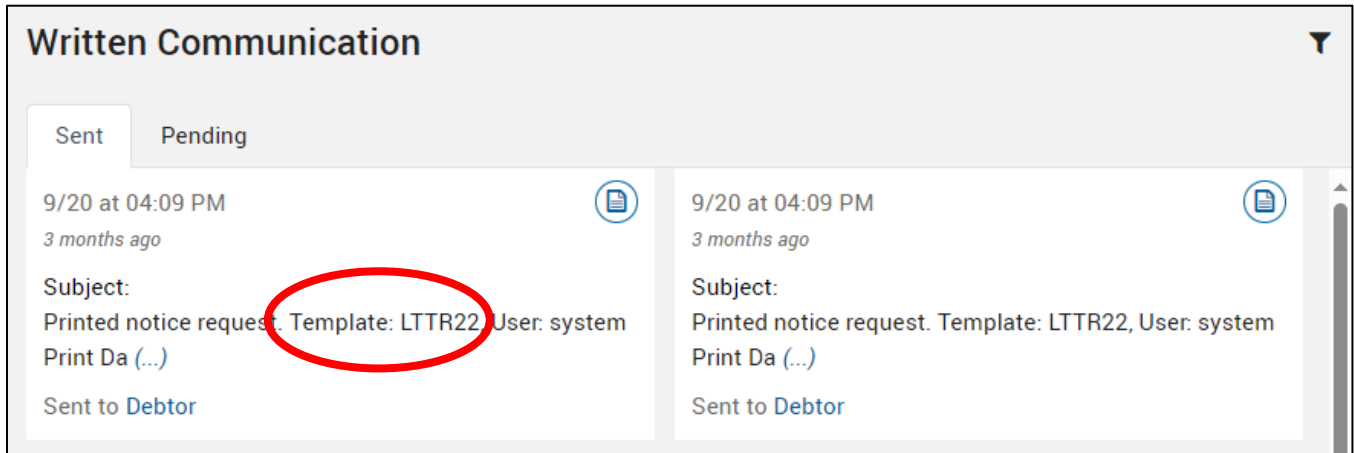
AR events that indicate verbal communication with the debtor will display here. Note: Not all AR events are configured to appear here.


Notices sent through Debt Manager will be viewable in the Written Communication section. Copies of the letter can be viewed or reprinted locally.

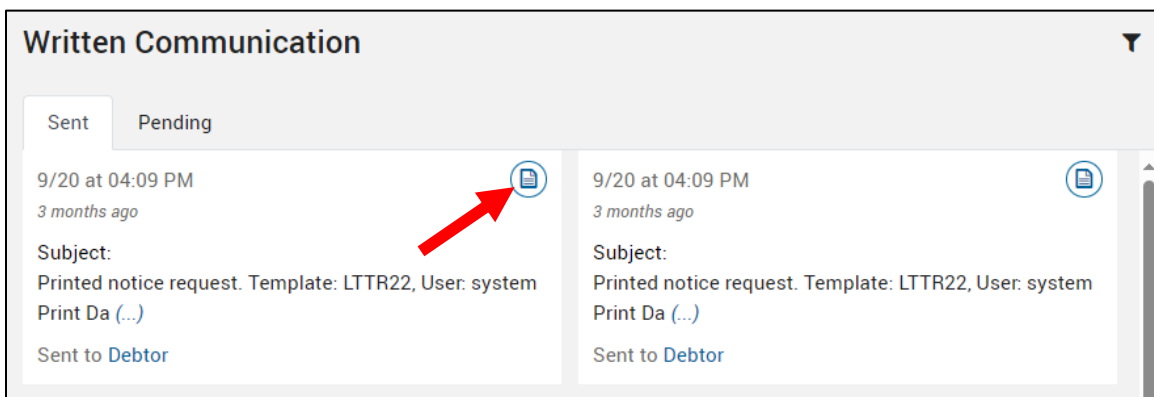
Use the **View all Historical Events** hyperlink as an alternate location to the Agent Console where notes can be read.

## Viewing Sent Notices

The letter template shortname indicates the content of the notice. Refer to the reference table in the [appendix](#) for a description of each notice.



1. From the Written Communication section, click the  icon to view a copy of the notice.



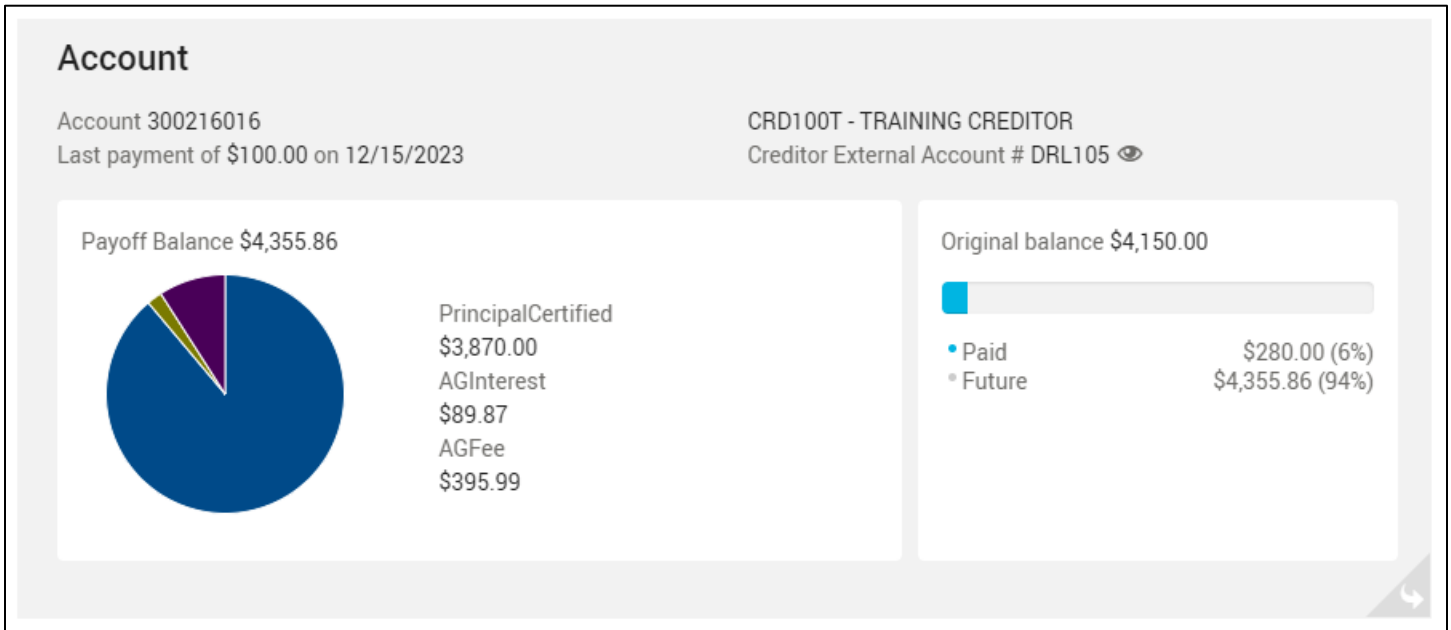
2. To locally print or save the document, select the printer icon.





## Account Balance Breakdown

A bucket-level breakdown of the account balance, as well as a view of payments made towards the account.



Using the corner icon to view the flip side of this card shows the current interest rate.

Note: the Current Balance seen here could be slightly different than the Payoff Balance seen on the other side of the card – the difference is the unposted daily interest and fee accrual. The Payoff Balance should be used as the most accurate balance.

### MORE ACCOUNT DETAILS

Account 300216016

Last payment of \$100.00 on 12/15/2023  
No next payment

Interest Simple 8.0000%  
Interest paid to date \$0.00

#### Other Balances

OriginalBalance	\$4,150.00
CurrentBalance	\$4,344.66
CreditBureauReportBalance	\$4,344.66
TotalPayment	-\$280.00
Overpayment	\$0.00

## Financial Transactions

All financial transactions, including payments and adjustments, for the debtor are viewable in this area. Use the drop-down arrow to view more details for the transaction.

To narrow down to a specific transaction when making inquiries to the AGO Accounting team, utilize this unique transaction ID.

Financial Transactions

8 items found ⌵

Id	Entered	Amount	Type	Status	Tendered	Created	Memo Code
> 629	02/01/2024	\$180.00	Payment	🕒	02/01/2024	02/06/2024	OFFSET
> 630	02/01/2024	\$0.00	ReApp	✅	02/01/2024	02/06/2024	
> 483	12/15/2023	\$100.00	Payment	✅	12/15/2023	12/15/2023	OFFSET
> 871	11/29/2023	-\$100.00	Suspended Payment	✅	11/29/2023	03/14/2024	PC
> 488	11/29/2023	\$100.00	Payment	🔄	11/29/2023	12/15/2023	PC
> 489	11/29/2023	\$0.00	ReApp	✅	11/29/2023	12/15/2023	
> 872	11/28/2023	\$0.00	ReApp	✅	11/28/2023	03/14/2024	
> 435	11/15/2023	\$737.10	Payment	✅	11/15/2023	11/15/2023	PAY

Show  Ext. Ref. Id  Addl. Ext. Ref. Id

Page 1 of 1 ⏪ ⏩

Some of the more common statuses a transaction might have:

- ✅ Posted – money has been applied to the account
- 🕒 Batched – transaction has entered into the system, but has not been reconciled by the Accounting team yet
- 🔄 Reversed – the payment was removed from the account

If the payment was attributed to the debtor, but not the current account you are viewing, you'll see the amount allocated to "Other Accounts".

### Financial Transactions

4 items found

Id	Entered	Amount	Type	Status	Tendered	Created	Memo Code	
483	12/15/2023	\$100.00	Payment	✓	12/15/2023	12/15/2023	OFFSET	
Other Accounts							\$100.00	OFFSET
488	11/29/2023	\$100.00	Payment	✓	11/29/2023	12/15/2023	PC	
Account Number 300216039							\$100.00	PC
PrincipalCertified							\$90.91	AGFee
Other Accounts							\$9.09	
Payment Schedule 16 instance523							\$100.00	
Payment Comment Person								
489	11/29/2023	\$0.00	ReApp	✓	11/29/2023	12/15/2023		
435	11/15/2023	\$737.10	Payment	✓	11/15/2023	11/15/2023	PAY	

Showing 1 - 1 of 1 items. Page 1 of 1.

Bucket breakdown of how the payment posted is also available in the drop-down details.

Page through to see additional transactions.

## Charges

Increases to an account balance due to the accrual of interest or fees are logged into this area.

The bucket impacted by the balance change is listed.

▼ Account Charges

Id	Type	Amount	Financial Bucket	Primary Owner	Status	Entered Date	Posted Date	Invoice Number	Washed
67119	CHARGE	-\$0.40	AGInterest	100289597 - RCVR-RECON01, TESTCASE	✓	12/2/23, 12:00 AM	12/2/23, 5:08 PM		✗
46366	CHARGE	-\$0.04	AGFee	100289597 - RCVR-RECON01, TESTCASE	✓	11/2/23, 12:00 AM	11/2/23, 6:09 PM		✗
46361	CHARGE	-\$0.42	AGInterest	100289597 - RCVR-RECON01, TESTCASE	✓	11/2/23, 12:00 AM	11/2/23, 6:09 PM		✗
18410	CHARGE	-\$0.04	AGFee	100289597 - RCVR-RECON01, TESTCASE	✓	10/2/23, 12:00 AM	10/2/23, 6:01 PM		✗
18405	CHARGE	-\$0.40	AGInterest	100289597 - RCVR-RECON01, TESTCASE	✓	10/2/23, 12:00 AM	10/2/23, 6:01 PM		✗
15072	CHARGE	-\$0.04	AGFee	100289597 - RCVR-RECON01, TESTCASE	✓	9/2/23, 12:00 AM	9/2/23, 6:00 PM		✗
15069	CHARGE	-\$0.42	AGInterest	100289597 - RCVR-RECON01, TESTCASE	✓	9/2/23, 12:00 AM	9/2/23, 6:00 PM		✗
11946	CHARGE	-\$0.02	AGFee	100289597 - RCVR-RECON01, TESTCASE	✓	8/2/23, 12:00 AM	8/2/23, 6:00 PM		✗
11940	CHARGE	-\$0.16	AGInterest	100289597 - RCVR-RECON01, TESTCASE	✓	8/2/23, 12:00 AM	8/2/23, 6:00 PM		✗
461	PLACEMENT	-\$98.00	PrincipalCertified	100289597 - RCVR-RECON01, TESTCASE	✓	7/21/23, 12:00 AM	7/21/23, 5:52 PM		✗

Items Per Page: 10

« 1 2 3 »

Placement charges are listed at the time of account certification.

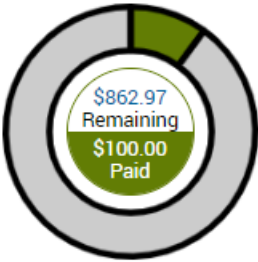
## Payment Arrangements

For accounts not forwarded to a Receiver, details of any payment arrangement that is set up will display.

Note: Payment arrangement details for accounts forwarded out to Receivers are stored in User-Defined Pages.

### Payment Arrangement

Paying \$100.00 Monthly  
Total installments **10** for **\$962.97**



\$862.97  
Remaining  
\$100.00  
Paid

Paid  
1  
Broken  
0  
Canceled  
0  
Future  
9

9 Future installments	\$862.97
0 Broken payments	\$0.00
Remaining to pay <span style="float: right;">\$862.97</span>	

### Installments

	Id	Due	Amount	Status
>	523	12/30/2023	\$100.00	✔
>	524	01/30/2024	\$100.00	○
>	525	02/29/2024	\$100.00	○
>	526	03/30/2024	\$100.00	○
>	527	04/30/2024	\$100.00	○
>	528	05/30/2024	\$100.00	○
>	529	06/30/2024	\$100.00	○
>	530	07/30/2024	\$100.00	○
>	531	08/30/2024	\$100.00	○
>	532	09/30/2024	\$62.97	○

Displaying 1 - 10 of 10 Page 1 of 1 ▾

<
>



# Debtor Profile

The Debtor Profile page is an alternate location to edit contact information, like address and phone numbers. There are fields available to enter information known about the debtor's financials and employment.

Debtor Profile

Debtor 100364325: CARL F. GAUSS | Account 300216019 | Creditor Legacy ID | Creditor Reference: CRN-XYZ7 | Creditor External Account #: DRL-XYZ

Profile Do Not Use

**Identity**

Debtor 100364325

*Personal Information* ...

Name CARL F. GAUSS  
DOB  
SSN \*\*\*-\*\*-0003  
Email

*Address* ...

Current 123 MATHEMATICS WAY  
COLUMBUS OH 43123  
United States  
Delaware

*Identifiers*  
Legacy Id

**Financials**

Disposable \$0.00

*Monthly Finances*

Incoming	Outgoing	Disposable
\$0.00	\$0.00	\$0.00

*Liabilities* ...

Housing payment  
Utilities

**Employments**

Unknown  
No current employments

Add

No employment available

Edit

Remove

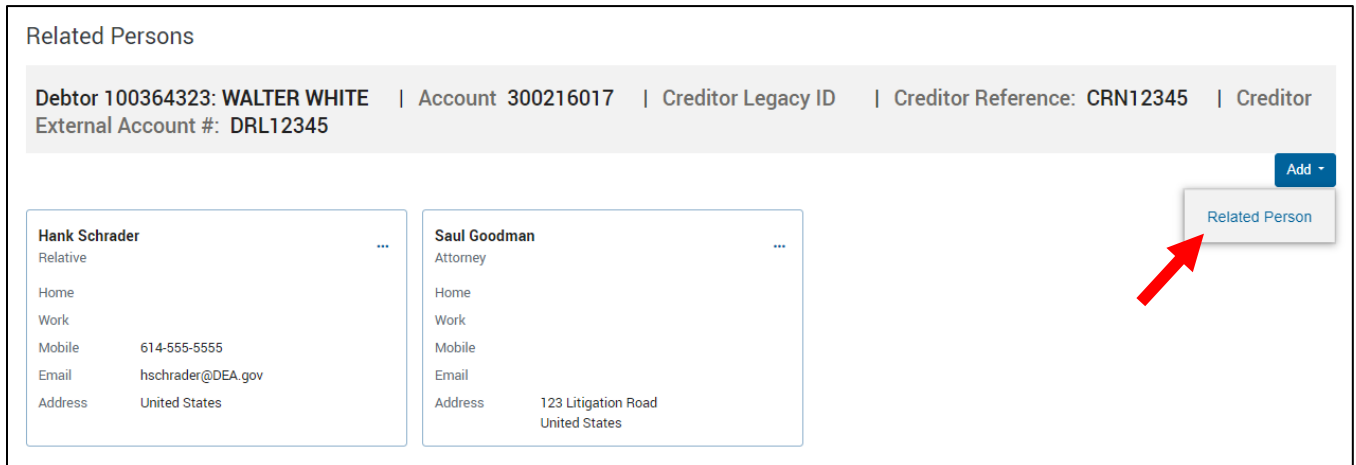
Use the ellipses menu options to edit information as needed.

# Related Persons

## Adding Related Persons Contacts

Additional contacts for the debtor, such as attorneys, alternate addresses, or authorized representatives can be added here.

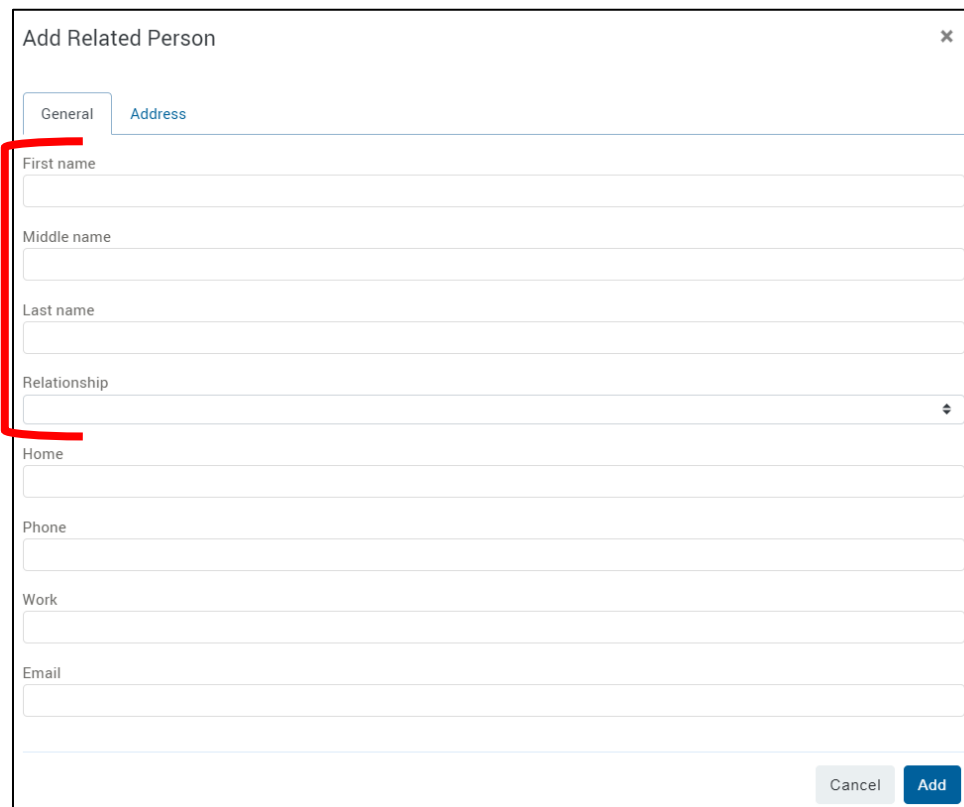
1. On the Related Persons page, select **Add** and select **Related Person**.



The screenshot shows the 'Related Persons' page for Debtor 100364323: WALTER WHITE. The page includes account and creditor information. There are two existing related persons listed: Hank Schrader (Relative) and Saul Goodman (Attorney). A red arrow points to the 'Add' button, which has a dropdown menu open showing 'Related Person' as an option.

2. Enter the name, select the relationship type.

Note: selecting the relationship type Attorney will add an Attorney tag to the debtor.



The screenshot shows the 'Add Related Person' form. The 'General' tab is selected. A red bracket highlights the 'First name', 'Middle name', 'Last name', and 'Relationship' fields. The 'Relationship' field is a dropdown menu. At the bottom right, there are 'Cancel' and 'Add' buttons.

3. Select the **Address** tab to enter a mailing address. When finished, click **Add**.

Add Related Person ✕

**General** **Address**

Country  
United States

ZIP

Address

City

State

County

Cancel **Add**

# User-Defined Pages

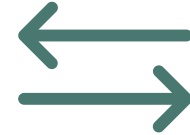
User-Defined Pages (UDP) are a multi-use feature of Debt Manager. They have been customized to meet various needs throughout the business process.



Fillable forms for requests and updates

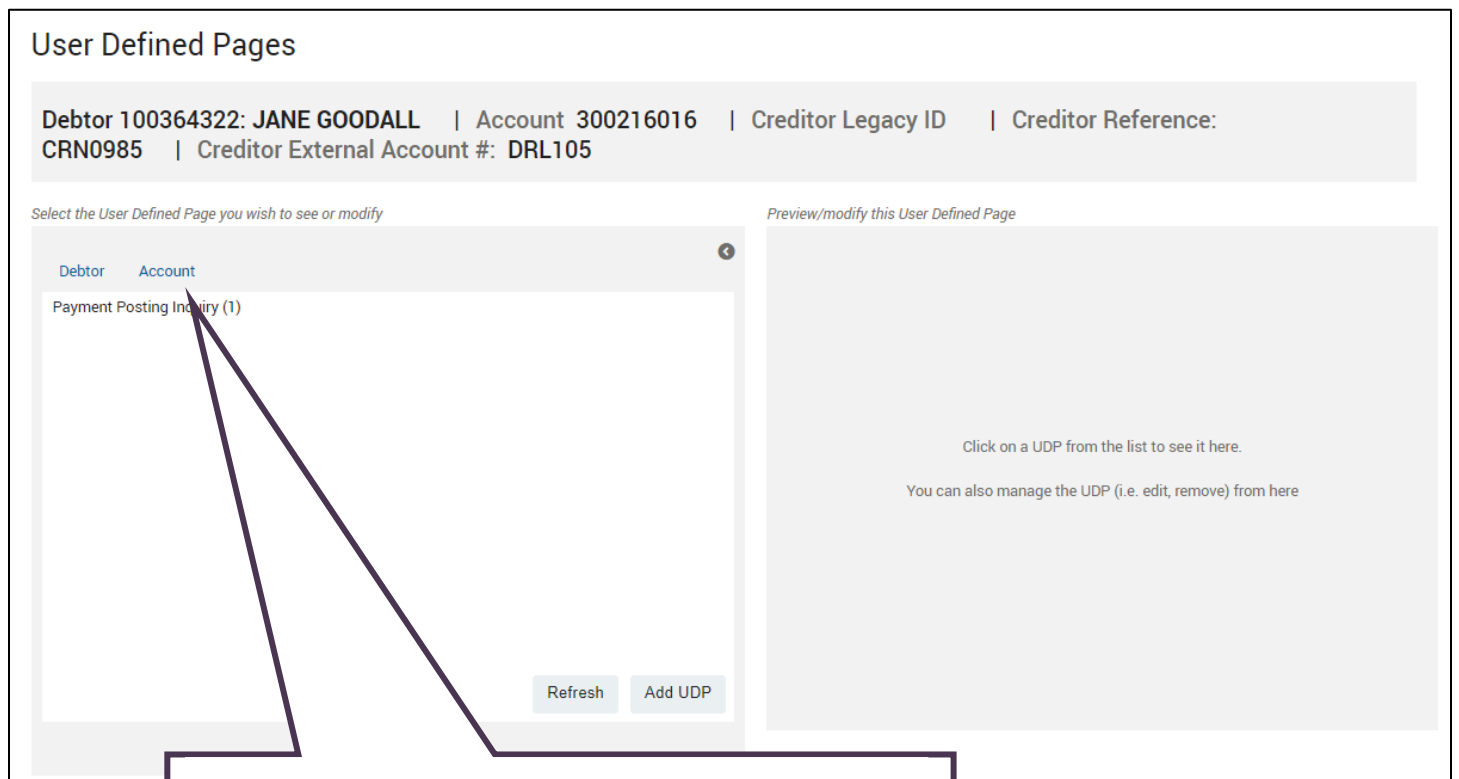


Provide information about a debtor or account, such as account certification reasons



Places for incoming and outgoing data exchange with outside systems

UDPs are associated with both the debtor and account level. Use the tabs labeled **Debtor** or **Account** to switch between the two.



Certification reasons, lien information, and other account-specific UDPs can be viewed on the **Account** tab.

## Creditor UDP Access

Debtor-level UDPs		
BANKRUPTCY	Read Only	Court case information related to a debtor's bankruptcy proceedings
BUSINESSINFO	Read Only	Additional business demographic information, if available
DEBTORFTI	Read Only	If FTI exists at the debtor level, information in this UDP is configured to create compliance messages
LIQUORHEARINGHISTORY	Read Only	Notes and results from liquor hearings
LQRPRTCD	Read Only	Liquor permit information is stored here
LOTTERYINTERCEPT	Read Only	Stores debtor and transaction information if funds from the Ohio Lottery Commission are intercepted
OFFSETHOLD	Read Only	Stores wrong party offset information
PROBATE	Read & Write	Record-keeping for probate cases
PYMTPSTINQ	Read & Write	A form to be reviewed by AGO Accounting when there are questions about how or where a payment posted – <a href="#">see instructions for this form</a>
RSTRCTENDRSMN	Read Only	If a check needed to be returned to the debtor because of restricted endorsement, related information is stored here

Account-level UDPs		
ACCOUNT FTI	Read Only	If an account contains FTI, information in this UDP will be configured to create compliance messages
ADDTNLINFO	Read & Write	Information provided in the Creditor certification file
BKYDCDRSN	Read Only	Bankruptcy Discharge Denial Reason – if an account is not included in the discharged debts of a bankruptcy, the reason the discharge was denied is recorded here
BMVHOLDRELEASE	Read Only	For BMV accounts only – used to provide BMV with payment confirmation information
BWCADDTNLINFO	Read & Write	BWC policy information
BWCPAYROLLRPT	Read & Write	BWC payroll report information
CERTREASON	Read & Write	Information provided in the Creditor certification file
CREDITORINQACCT	Read & Write	A fillable form to provide information for AGO’s Accounting department to address questions about balances/payments on an account – <a href="#">see instructions for this form</a>
JUDGMNTLIEN	Read Only	Records for judgments and liens filed by Special Counsel
LIEN	Read Only	Status, county, and issued/filed information about liens
LIENDEMO	Read Only	Stores address information at the time of lien issuance
PATIENT INFO	Read & Write	Information provided in the Creditor certification file
RCVRCCNTINF	Read Only	If the account is forwarded out to a Receiver, the contact information of their office displays here
RCVRPAYSCHDINFO	Read Only	If the account is forwarded out to a Receiver and on a payment plan, the details of the plan display here
STATUTEOFLIMITATIONS	Read Only	SOL or Extended SOL date, if available

## Payment Posting Inquiries

An inquiry about how or where a payment posted, this form can be filled out for the AGO Accounting team to review.

1. Navigate to the UDP page, click Debtor. Select **Add UDP**.

User Defined Pages

Debtor 100364323: WALTER WHITE | Account 300216017 | Creditor Legacy ID | Creditor Reference: CRN12345 | Creditor External Account #: DRL12345

Select the User Defined Page you wish to see or modify

Debtor Account

No User Defined Pages added yet for this Debtor.

Refresh Add UDP

Preview/modify this User Defined Page

Click on a UDP from the list to see it here.

You can also manage the UDP (i.e. edit, remove) from here

2. Select **Payment Posting Inquiry** from the left panel to populate the UDP fields on the right. Use **Request Status: New**. Complete all known fields, including notes about what Accounting should be looking for. Click **Save**, then **Done**.

Debtor UDP Templates

Debtor: 100364322

Select the user defined template you wish to use for this Account

Liquor Permit for Custom View

Payment Posting Inquiry

Probate

Page 1 of 1

Create User Defined Page

Payment Posting Inquiry

Request Status

Request Date mm/dd/yyyy

Request By

Receiver Short Name

Receiver Name

Payment Type

Suspense ID

Suspense Date mm/dd/yyyy

Payment Amount

Notes

Accounting Findings

Completed By

Completed Date mm/dd/yyyy

Cancel Save

Note: See the [Financial Transactions](#) for where to find a Financial Transaction ID.

## Creditor Inquiry UDP

This is an additional form available to send questions to the AGO Accounting team about a specific account.

1. Navigate to the UDP page, click Account. Select **Add UDP**.

User Defined Pages

Debtor 100364350: SKYLAR WHITE | Account 300216017 | Creditor Legacy ID | Creditor Reference: CRN12345 | Creditor External Account #: DRL12345

Select the User Defined Page you wish to see or modify

Preview/modify this User Defined Page

Click on a UDP from the list to see it here.  
You can also manage the UDP (i.e. edit, remove) from here

Refresh Add UDP

2. Select **Creditor Inquiry – Account** from the left panel to populate the UDP fields on the right. Use **Request Status: New**. Complete all known fields, including notes about what Accounting should be looking for. Click **Save**, then **Done**.

Account UDP Templates

Account: 300216017

Select the user defined template you wish to use for this Account

Create User Defined Page

Creditor Inquiry - Account

Request Status

Request Date mm/dd/yyyy

Request By

Creditor Short Name

Creditor Name

Financial Transaction ID

Posted Date mm/dd/yyyy

Payment Amount

Fee Amount

Creditor Notes

AGO Findings

Completed By

Completed Date mm/dd/yyyy

Cancel Save

Page 1 of 1 < >

Done

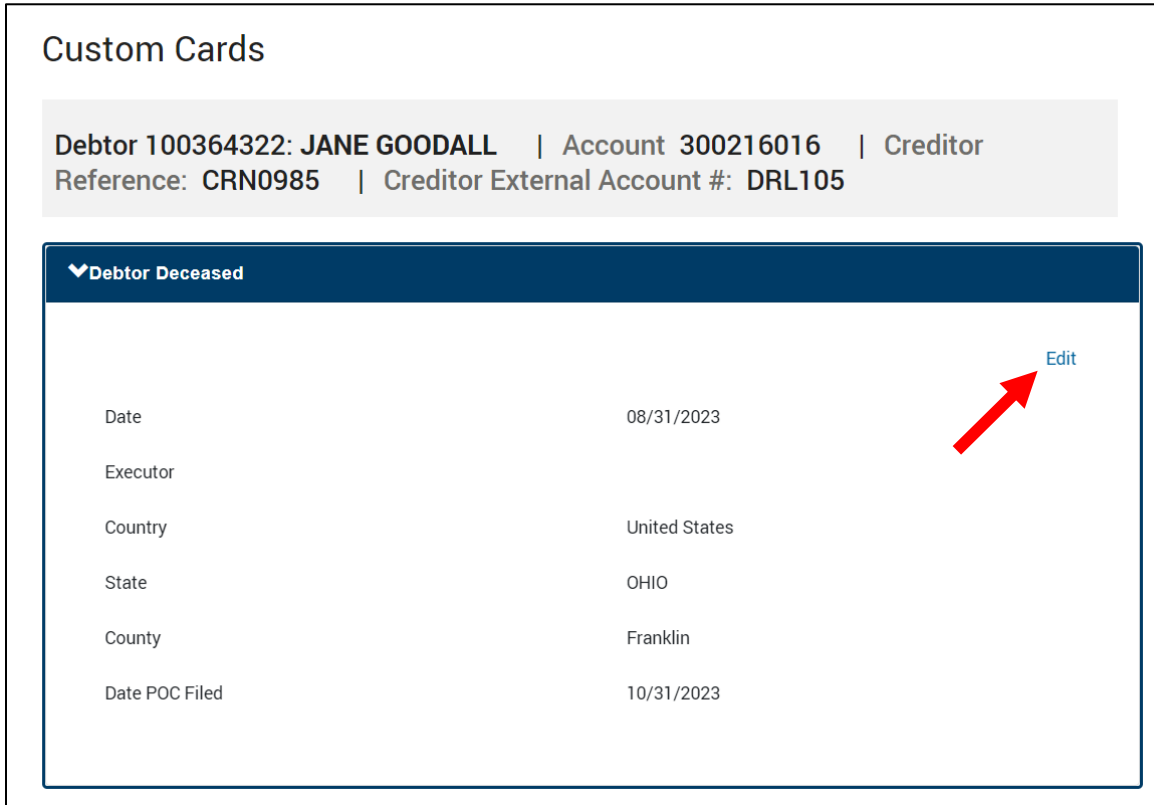
Note: See the [Financial Transactions](#) for where to find a Financial Transaction ID.



# Custom Cards

## Deceased Debtor Information

1. Select **Edit** to enter any known fields.



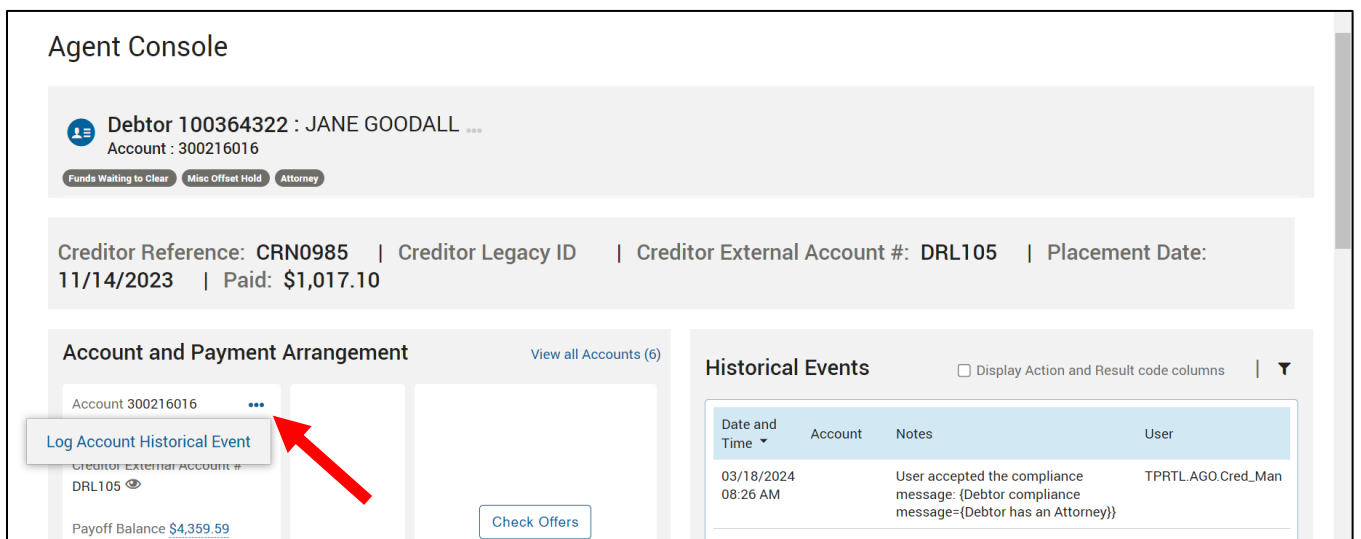
**Custom Cards**

Debtor 100364322: JANE GOODALL | Account 300216016 | Creditor Reference: CRN0985 | Creditor External Account #: DRL105

**▼ Debtor Deceased**

Date	08/31/2023	<a href="#">Edit</a>
Executor		
Country	United States	
State	OHIO	
County	Franklin	
Date POC Filed	10/31/2023	

2. Navigate to the Agent Console page and use the account menu option to **Log Account Historical Event**.



**Agent Console**

Debtor 100364322 : JANE GOODALL ...  
Account : 300216016

Funds Waiting to Clear Misc Offset Hold Attorney

Creditor Reference: CRN0985 | Creditor Legacy ID | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$1,017.10

**Account and Payment Arrangement** [View all Accounts \(6\)](#)

Account 300216016 ...

**Log Account Historical Event**

Creditor External Account # DRL105

Payoff Balance \$4,359.59 [Check Offers](#)

**Historical Events**  Display Action and Result code columns

Date and Time	Account	Notes	User
03/18/2024 08:26 AM		User accepted the compliance message: (Debtor compliance message={Debtor has an Attorney})	TPRTL.AGO.Cred_Man

3. Select the AR pair **CRDUPDT / DECEASED**.

### Action & Result Code Search ✕

#### Action Codes

Short name 🔍

Short name	Description
BMVRLS	BMV Hold Release
COMMENT	Comment
DWNLDDOC	DwnldDoc
<b>RCVRUPDT</b>	<b>Receiver Update</b>
UPLDDOC	UpldDoc

#### Result Codes

Short name 🔍

Short name	Description
ACTDUTY	Active Duty
<b>DECEASED</b>	<b>Deceased</b>
DISPUTE	Dispute
FRAUDHLD	Fraud
INCARCTD	Incarcerated
SCBKYNW	Special Counsel Bankruptcy New
SCBKYUPD	Special Counsel Bankruptcy Update

Cancel
Done

Note: if probate information needs to be kept, there is a debtor-level UDP available in the User-Defined Pages section.

### User Defined Pages

Debtor 100364325: **CARL F. GAUSS** | Account 300216019 | Creditor Legacy ID | Creditor Reference: **CRN-XYZ7** | Creditor External Account #: **DRL-XYZ**

Select the User Defined Page you wish to see or modify

Debtor
Account

Probate

Refresh
Add UDP

Preview/modify this User Defined Page

📄
Probate
⋮

**Case Information**

Date of Death 02/26/2024

Case Number

Court

Court Designation

County

State

**Executor Information**

Executor Type: Person

Executor Work Phone

Executor Mobile Number

Executor Email

**Notes**

Notes

**Proof of Claim**

Date of Proof of Claim

Amount of Proof of Claim

# Appendix

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## Acceptable File Types to Upload

PDF, JPG, TIFF, PNG, and CSV

## Acceptable File Names to Upload

The following special characters are allowed in file names: hyphens, underscores, and periods


When uploading files, remove any other special characters. Characters in the table below should **not** be included in the file name.

# pound	% percent	& ampersand	{ left curly bracket	} right curly bracket
\ back slash	< left angle bracket	> right angle bracket	* asterisk	? question mark
/ forward slash	 blank spaces	\$ dollar sign	! exclamation point	' single quotes
" double quotes	: colon	@ at sign	+ plus sign	` back tick
 pipe	= equal sign			

## Notices

Short Name	Description
<b>Internal – Certification Notices</b>	
LTTR21	UNV SCS First Notice
DAG100	Department of Aging Bed Inspection Fees
DAG100A	Department of Aging Consumer Guide Fees
DAG100P	Department of Aging Passport Program
LT101MH	MH SCS First Notice
LT201MH	MH SCS Second Notice
LT202	LT202 Smoking Ban Notice
LT203MH	MH SCS Final Notice
<b>Internal – General Collections</b>	
LT915	Paid in Full
LT920U	Phone Call Request
LT927	Financial Form (Personal)
LTDBLREF	Double Refund
LTDSCDTR	BKY Discharge Determination
LTEXPTPL	Extended Payment Plan
LTFNLDUE	Final Payment Plan Payment Due
LTNCLDBT	AGO Non-Client Debt
LTPYRCPT	Payment Receipt
LTPYSMAC	Payment Summary Account
LTPYSMDB	Payment Summary Debtor
LTRSTRCT	Restrictively Endorsed
LTTR21	UNV SCS First Notice
LT215	Cancellation Notice
LT311	Payment Plan
LT313	Missed Payment
LT427	Financial Form (Business)
LT208	Forwarding Notice
CFDUPFLG	CO Fault Duplicate Filing
<b>BWC Lien Notice</b>	
LT210	BWC Due Process Notice
LT210CAN	BWC Due Process Notice - Canada ONLY
LT210REC	BWC Lien Notice
<b>Lien Filing</b>	
LT801F	BWC Clerk Lien - Filed FTP/FitPortal/Manual
LT801I	BWC Clerk Lien - Issued FTP/FitPortal
LT801M	BWC Clerk Lien - Issued Manual
LT805F	BWC Clerk Lien Renewal - Filed - FTP/FitPortal/Manual
LT805I	BWC Clerk Lien Renewal - Issued - FTP/FitPortal/Manual
LT805M	BWC Clerk Lien Renewal - Issued Manual
LT802F	BWC Recorder Lien - Filed
LT802I	BWC Recorder Lien - Issued

LT806FR	BWC Recorder Lien Praecipe Renewal - Filed
LT806IR	BWC Recorder Lien Praecipe Renewal - Issued
LT807FR	BWC Recorder Lien Renewal on IC Claim - Filed
LT807IR	BWC Recorder Lien Renewal on IC Claim - Issued
LT112F	BWC Notice of Filing Lien IC Claim (LT112) (Recorder Lien IC Claim (LT803 - Affidavit) - Filed)
LT112I	BWC Notice of Filing Lien IC Claim (LT112) (Recorder Lien IC Claim (LT803 - Affidavit) - Issued)
LNNMREMV	Name Removal
<b>Lien Releases</b>	
BWCSAT	BWC Lien Satisfaction Notice
LT811	BWC Clerk Lien Release – Manual
LT812	BWC Recorder Lien Release Cover Letter and Notice
LT821	BWC Recorder Lien Release – Manual
LT822	BWC Recorder Lien Release – Manual
<b>Liquor Permit</b>	
LT480B	BWC Balance Due
LT483B	BWC Liquor Permit Request for Citation
LT484B	BWC Liquor Permit Citation
LT486A	BWC Request for Release of Suspension (Taxpayer)
LT486B	BWC Request for Release of Suspension (LCC)
LT488B	BWC Nonrenewal
LT494B	BWC Dismissal Without Prejudice
LQMOD	Liquor Modification Order
LQBWCAAG	BWC AAG Dismissal Letter
<b>Null &amp; Void Liens</b>	
NVBCOSTC	BCNV Bankruptcy Null and Void Cost Letter to Clerk
NVBCOSTR	BRNV Bankruptcy Null and Void Cost Letter to Recorder
NVBCUC1	BCNV Bankruptcy Clerk Null and Void to TransUnion
NVBCUC2	BCNV Bankruptcy Clerk Null and Void to Experian
NVBCUC3	BCNV Bankruptcy Clerk Null and Void to Equifax
NVBCUR1	BRNV Bankruptcy Recorder Null and Void to TransUnion
NVBCUR2	BRNV Bankruptcy Recorder Null and Void to Experian
NVBCUR3	BRNV Bankruptcy Recorder Null and Void to Equifax
NVBWC	SCNV Null and Void Lien Release to Clerk
NVBWCR	SRNV Null and Void Lien Release to Recorder
NVCOSTC	SCNV Null and Void Cost Letter to Clerk
NVCOSTR	SRNV Null and Void Cost Letter to Recorder
NVCUC1	SCNV Clerk Null and Void to Experian
NVCUC2	SCNV Clerk Null and Void to TransUnion
NVCUC3	SCNV clerk Null and Void to Equifax
NVCUR1	SRNV Recorder Null and Void to Equifax
NVCUR2	SRNV Recorder Null and Void to Experian
NVCUR3	SRNV Recorder Null and Void to TransUnion
BKR13CLK	BCNV Bankruptcy Null and Void Lien Release to Clerk
BKR13REC	BRNV Bankruptcy Null and Void Lien Release to Recorder

 County Clerks & Recorders require BWC lien releases to be sealed by our office. You must still contact our staff to obtain a sealed copy of a BWC lien release.