CARES
Collections Account Resolution & Enforcement System

Debt Manager FitPortal™

What you'll find…

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

Receiver Reference Guide

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	https://youtu.be/CCKfjoKZe8Q
Adding the FitPortal to Your Favorites	https://youtu.be/bVozFBnIhzg
Clearing Your Cache	https://youtu.be/xqbMv7BJRHQ
Running and Viewing Reports	https://youtu.be/s1hbNiFudnc
Search and Search Results	https://youtu.be/d7q7qaD_jlw
Agent Console Overview	https://youtu.be/JzJbwGaFu28
Documents	https://youtu.be/7DFNN7vmGZg
Editing Debtor Contact Information	https://youtu.be/NQPEzV5Ko58
Balance Calculation Tool	https://youtu.be/oePYASKNGGQ
Adding Notes and Tags	https://youtu.be/jWJ9NQWLJ0I
Financial Center Overview	https://youtu.be/3FYFxKHQmP0
Debtor Profile Overview	https://youtu.be/41GjGlRGTN8
Related Persons Overview	https://youtu.be/EmcLynU1Er0
User Defined Pages Overview	https://youtu.be/NttIQsVAXNI
Adding Court Name to BKY UDP	https://youtu.be/v-bm36DCIU4
Adding and Editing UDPs	https://youtu.be/XCEUazOwlm4
Reporting BMV PIF Payments	https://youtu.be/3j7fZzAQrss
Deceased Debtor Information	https://youtu.be/18nrFhxnucs

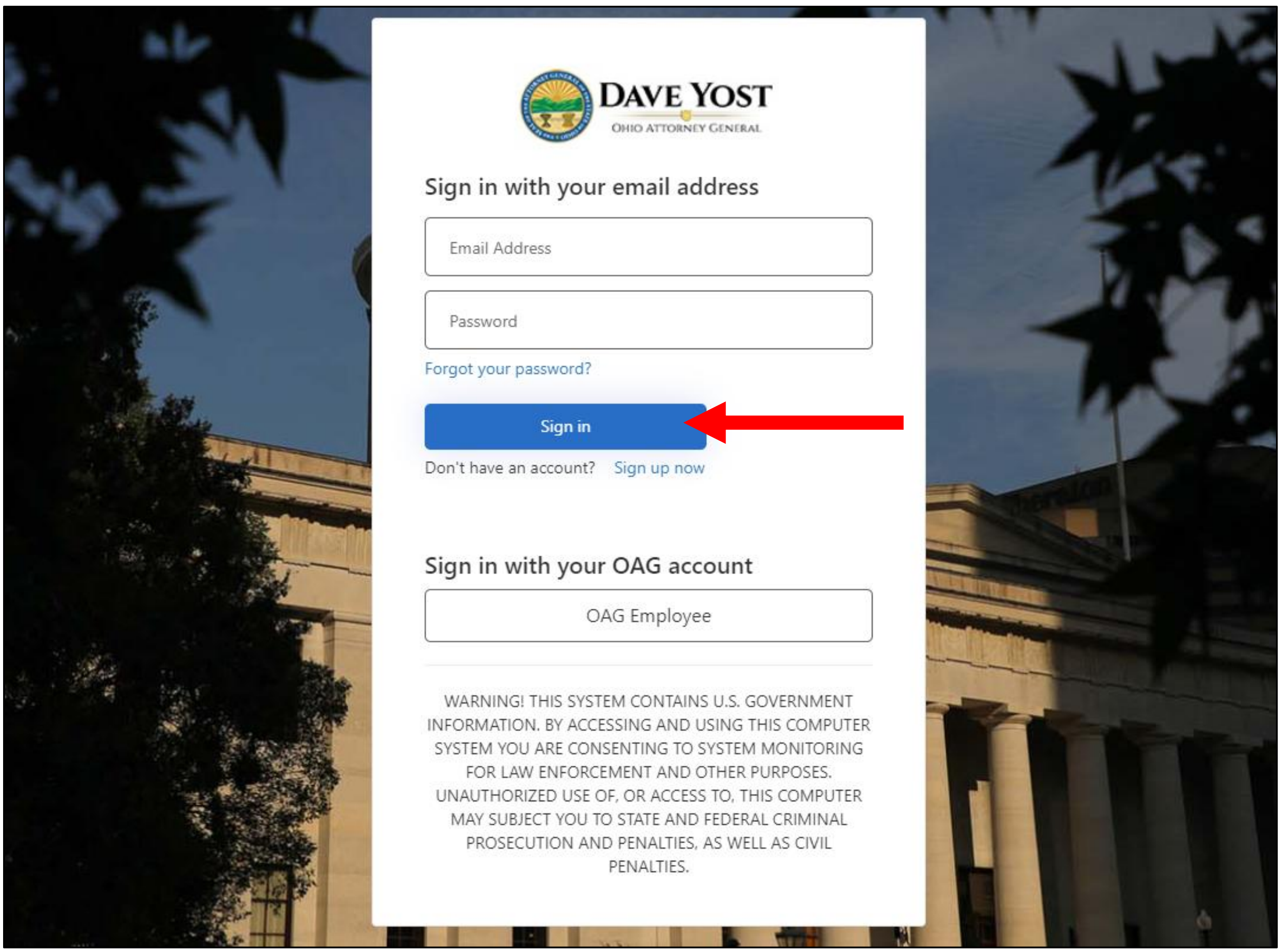
Contents

Logging In

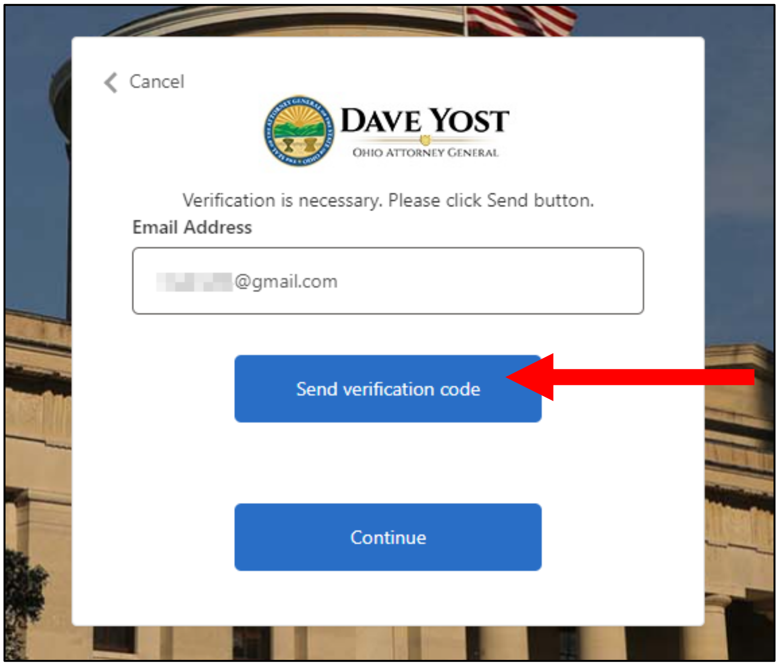
Microsoft Edge is the recommended browser to access the portal

https://debtmanager.ohioattorneygeneral.gov/debtmanager

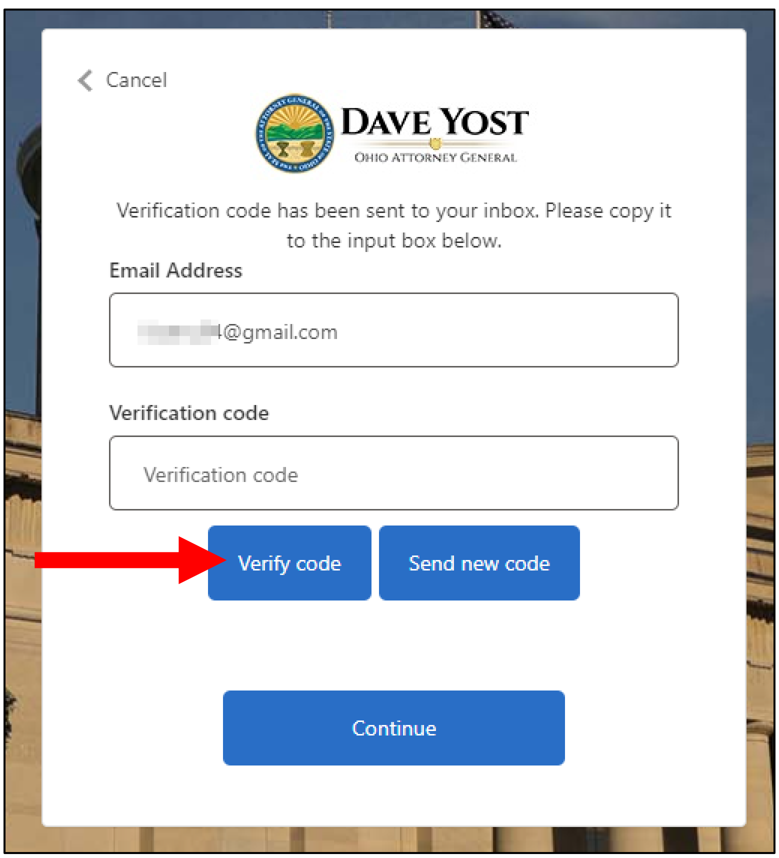
Enter your portal login credentials and click **Sign in**.



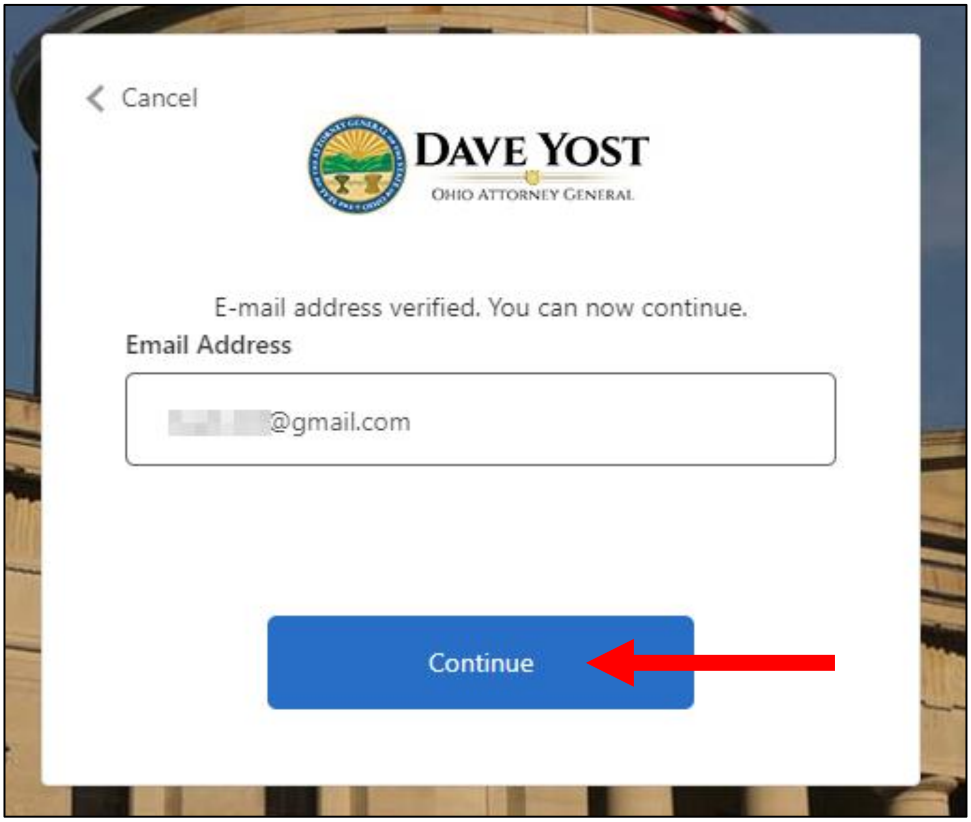
Click **Send verification code** and retrieve the code from your email.



Enter code and select **Verify code**.

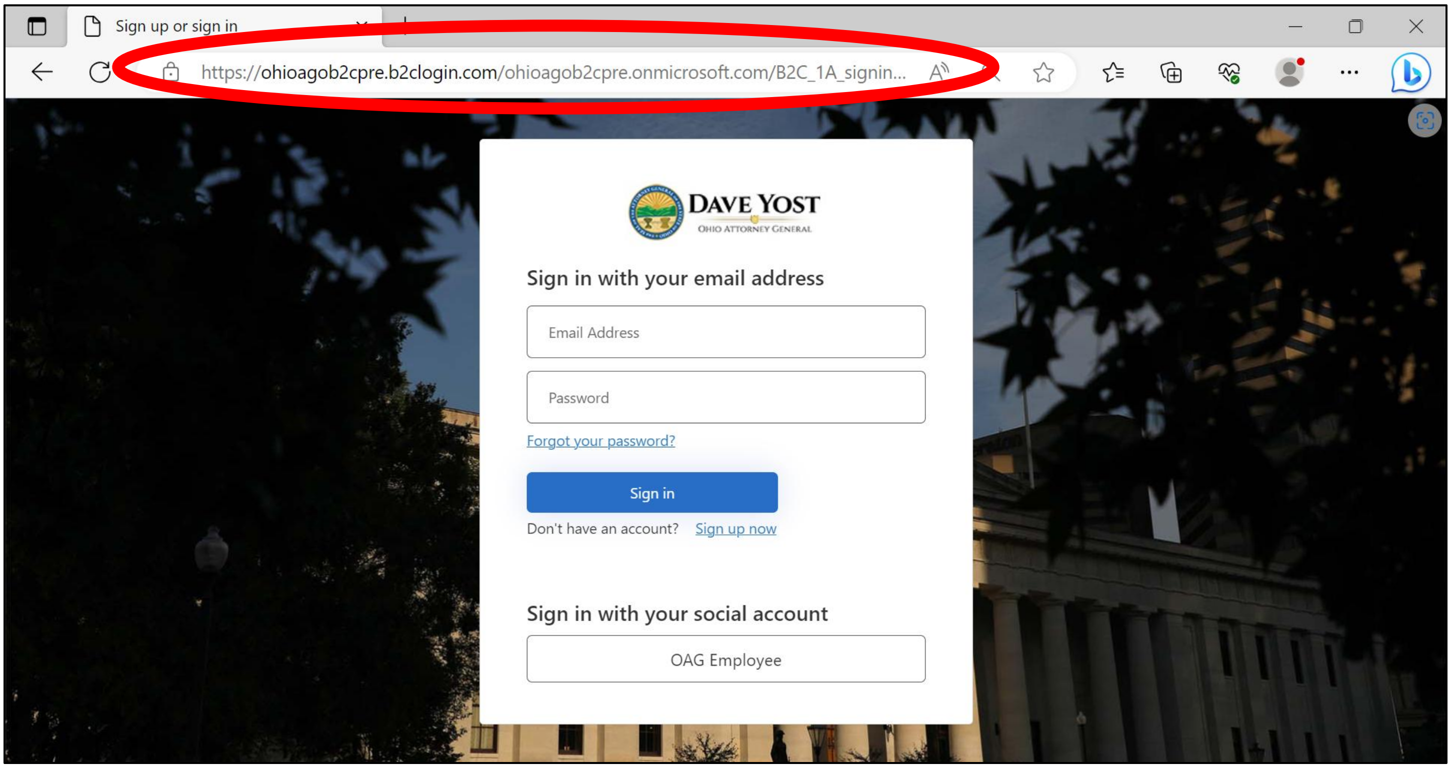


Click **Continue**.

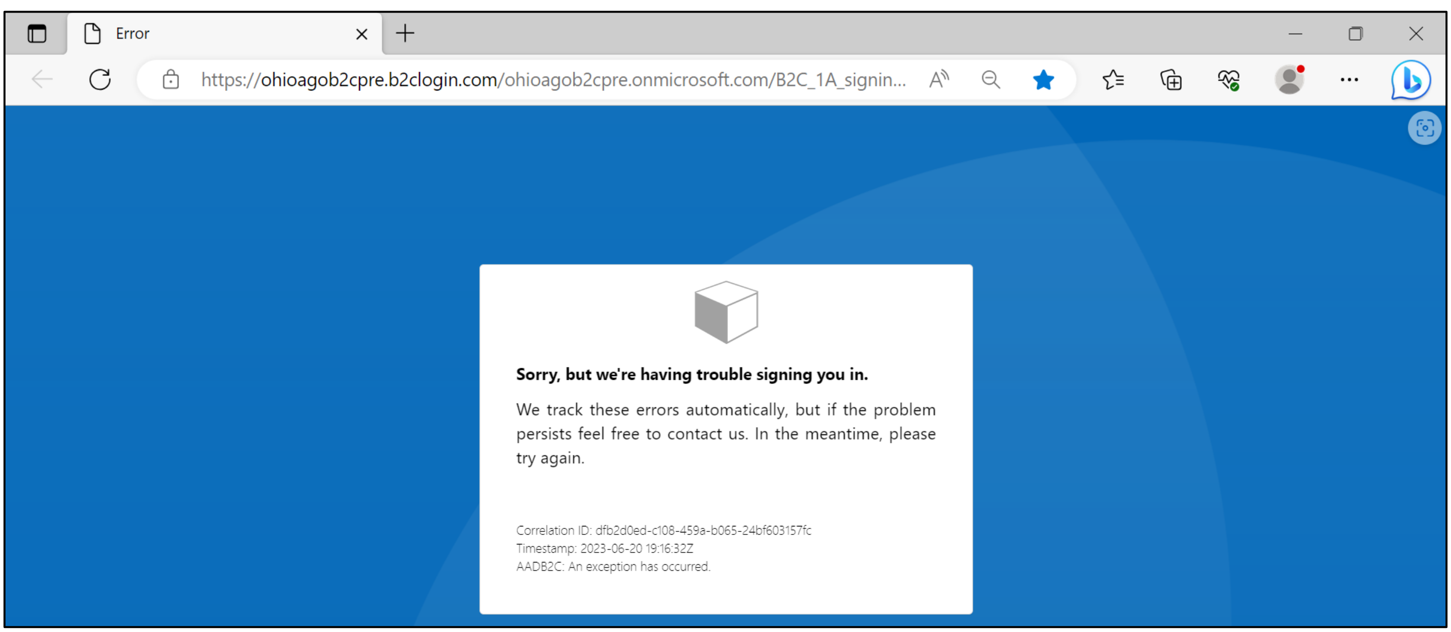


How to Favorite the Portal URL

The portal URL redirects to our authentication login.

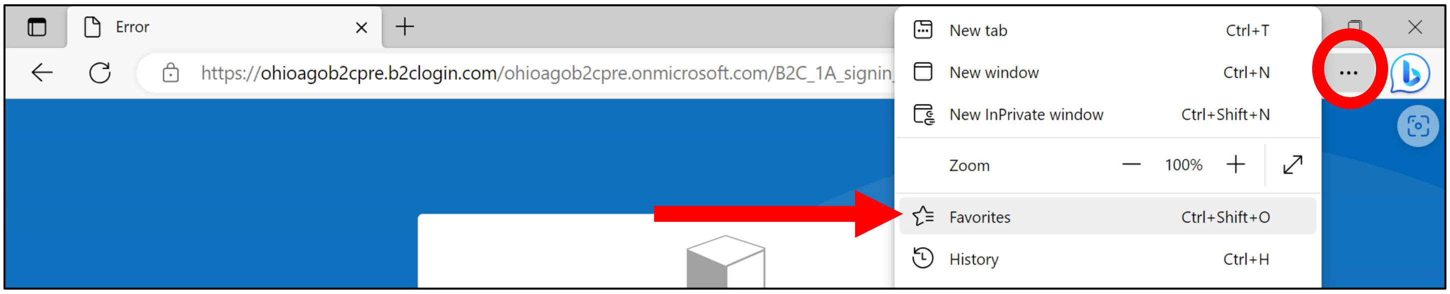


If you add this link to your favorites using the star icon ☆, you may be redirected to an error page when accessing later on.

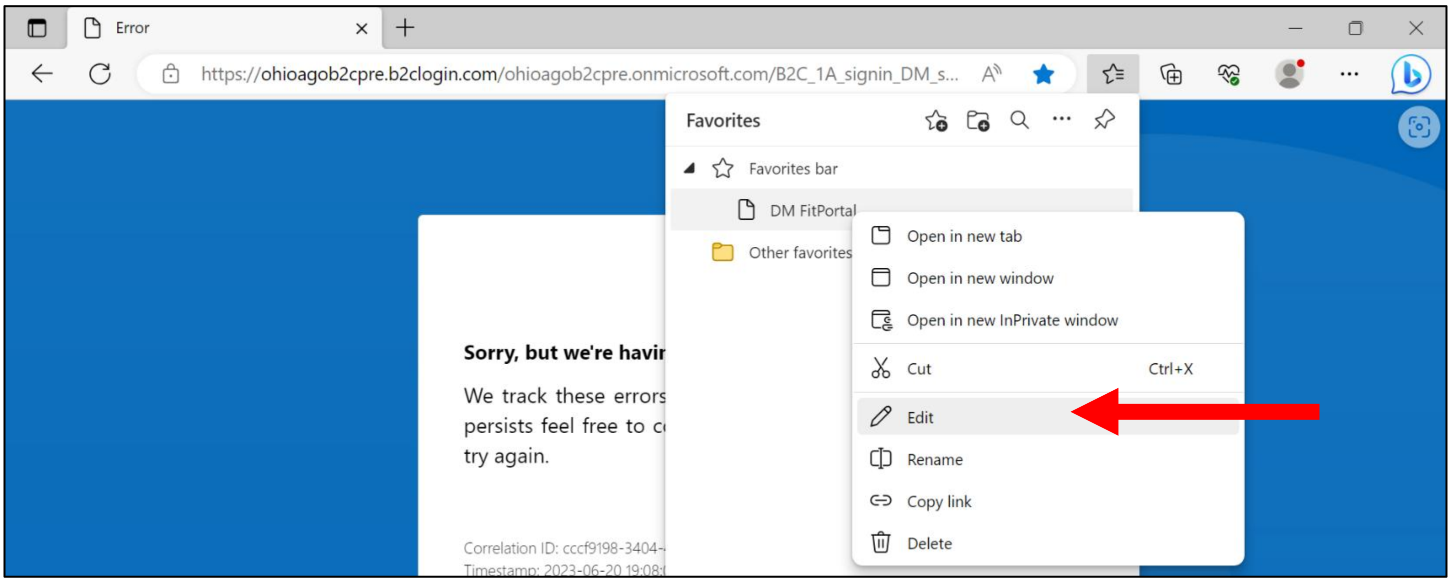


Follow the steps below to add the correct URL to your **Microsoft Edge** Favorites.

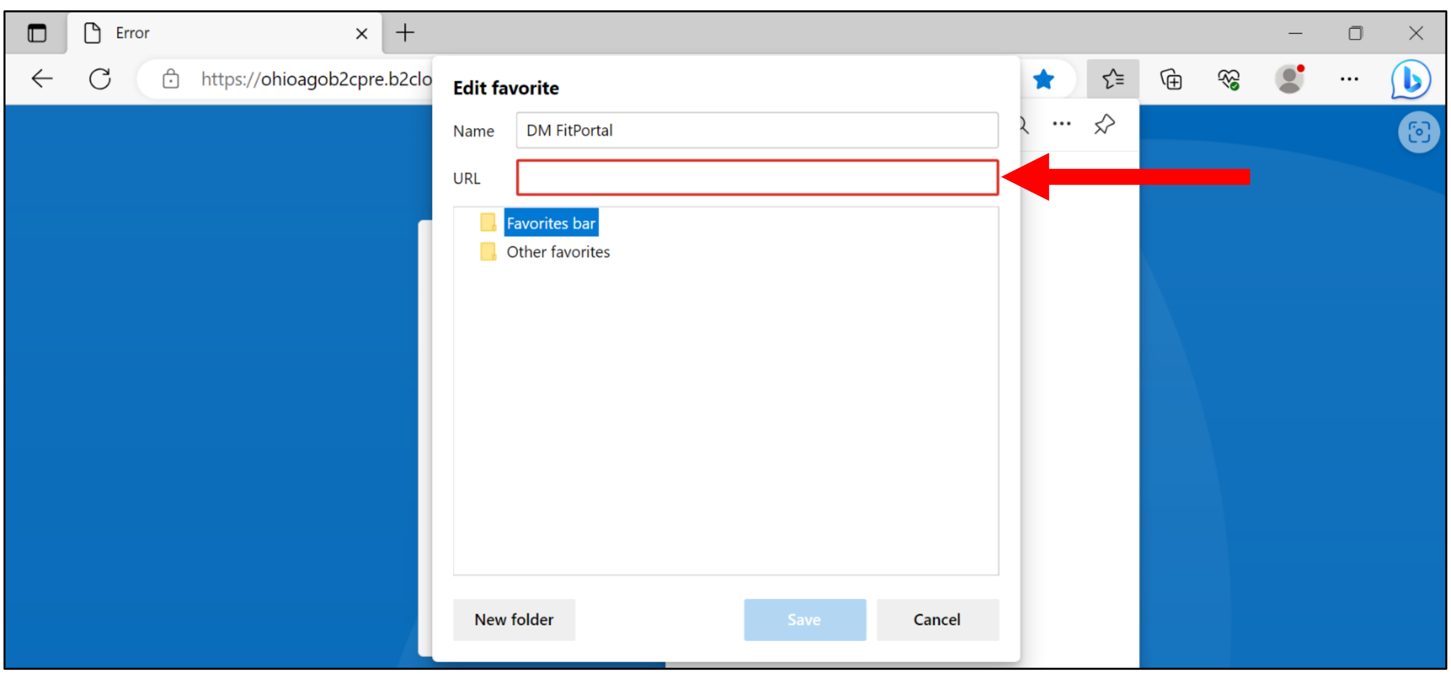
1. Use the ellipses ••• in the toolbar to open the browser menu. Select **Favorites**.



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



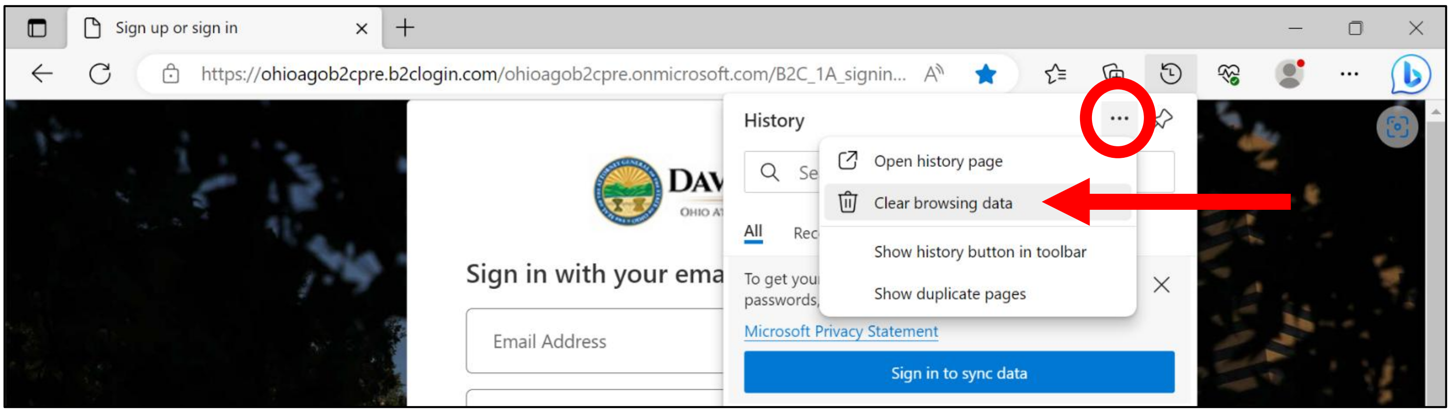
3. Delete the authentication login URL and paste the correct portal link in the field. Click **Save**.



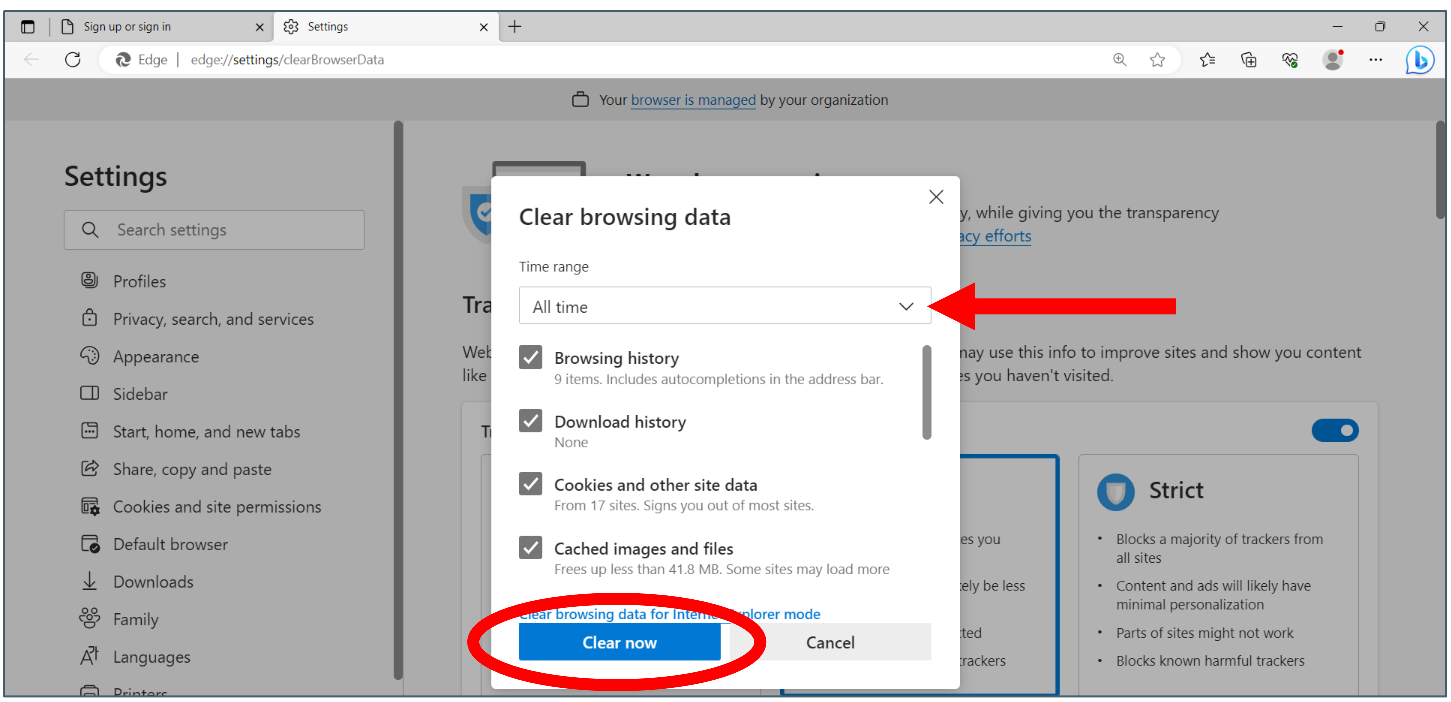
How to Clear History/Cache in Microsoft Edge

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**.

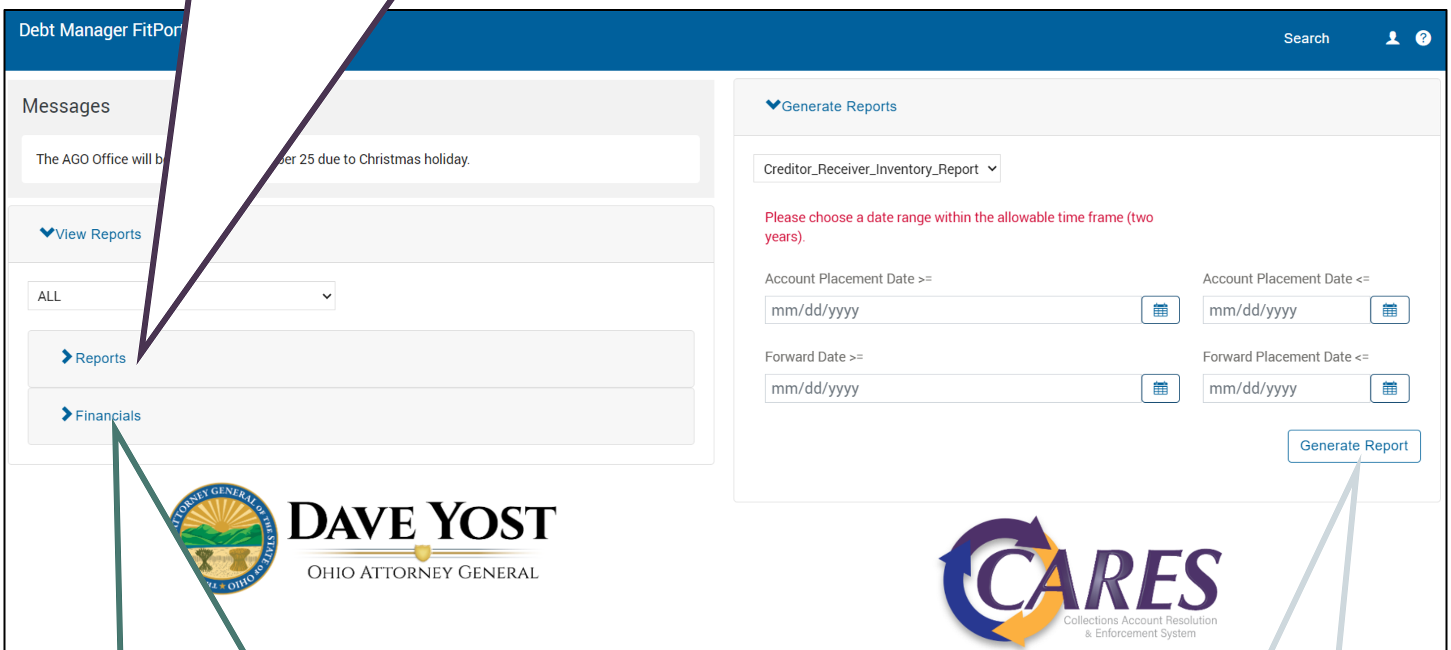


3. Confirm the Time range is **All time**. Select **Clear now**.



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.



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.

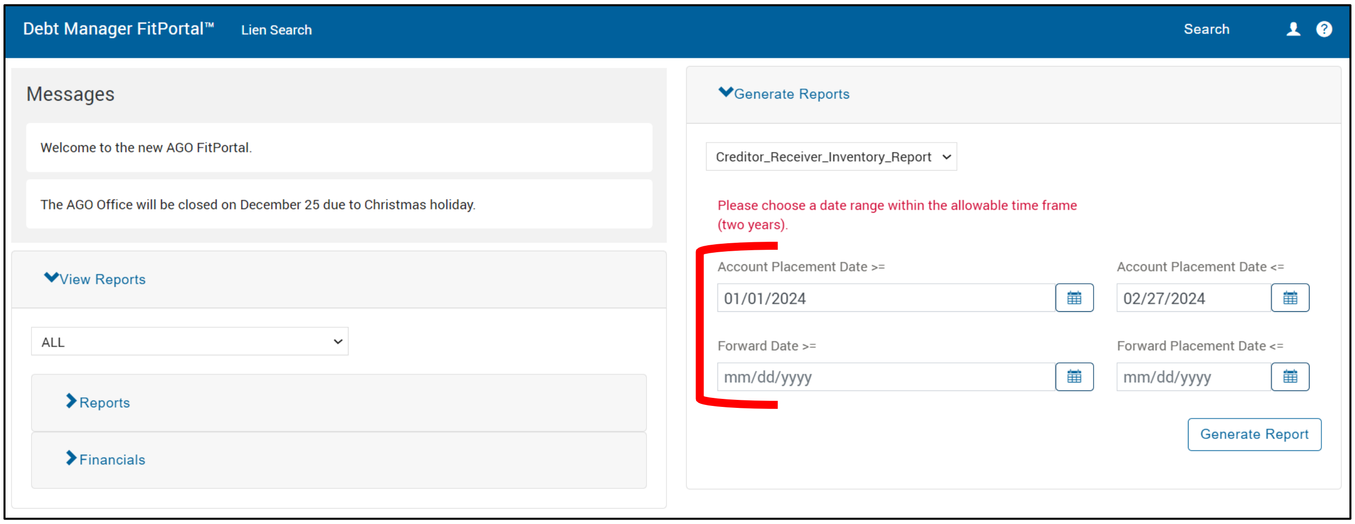
Available Receiver Reports

For Manager roles only

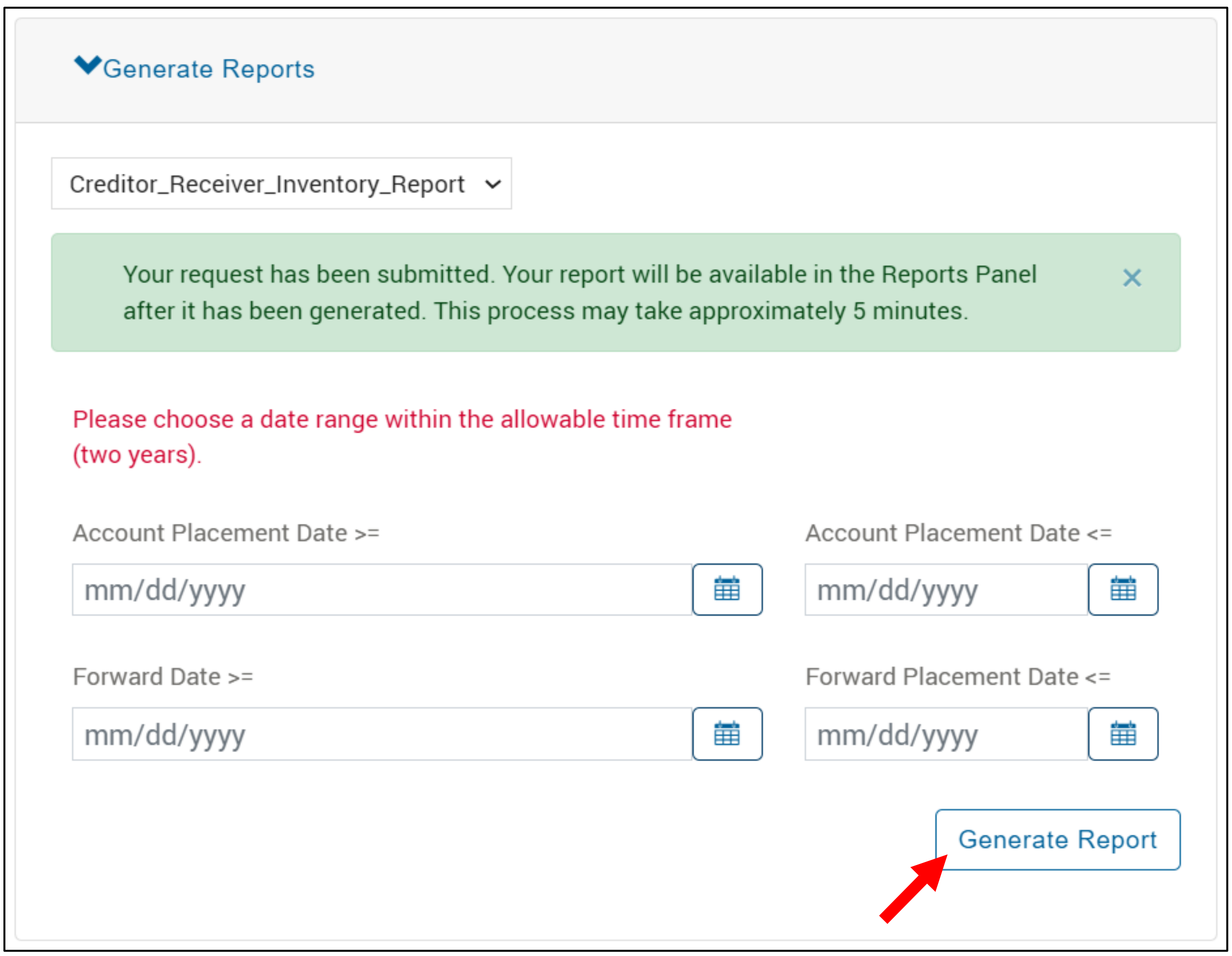
Report Name	Description
Financial Breakdown	A complete financial history for each account, including charges, payments, and adjustments
Inventory	Details for each account currently out to your office, including tags, forwarding information, original balance, current balance, amounts collected, and last payment date
Receiver Spindown	Shows the amount collected on accounts each month, based on the age of placement
Financials Only available once statements are generated by AGO Accounting	
Statements	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.



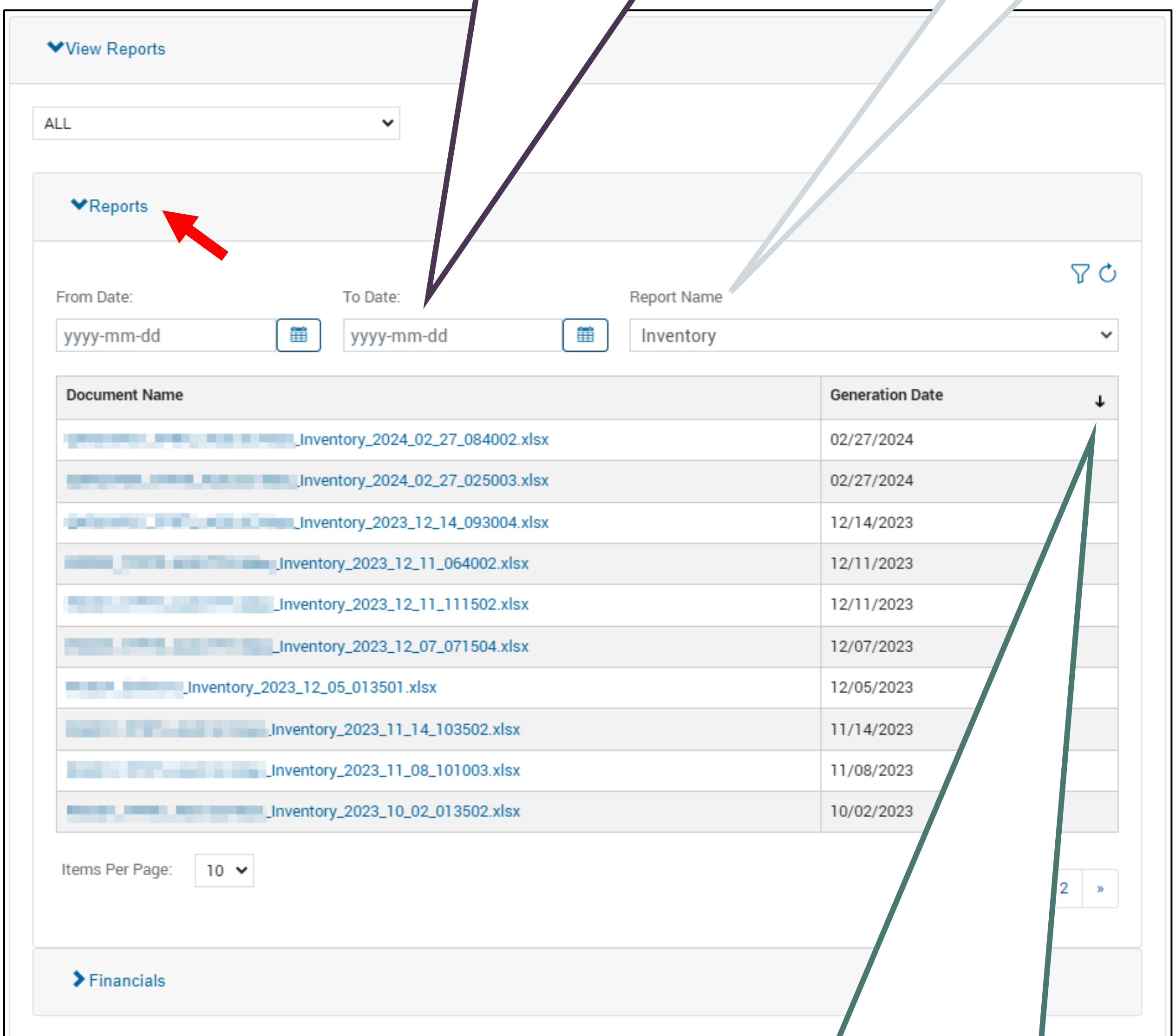
2. Click **Generate Report**. A notice will indicate the successful request of the report and direct you to retrieve it in the Reports panel.



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 .

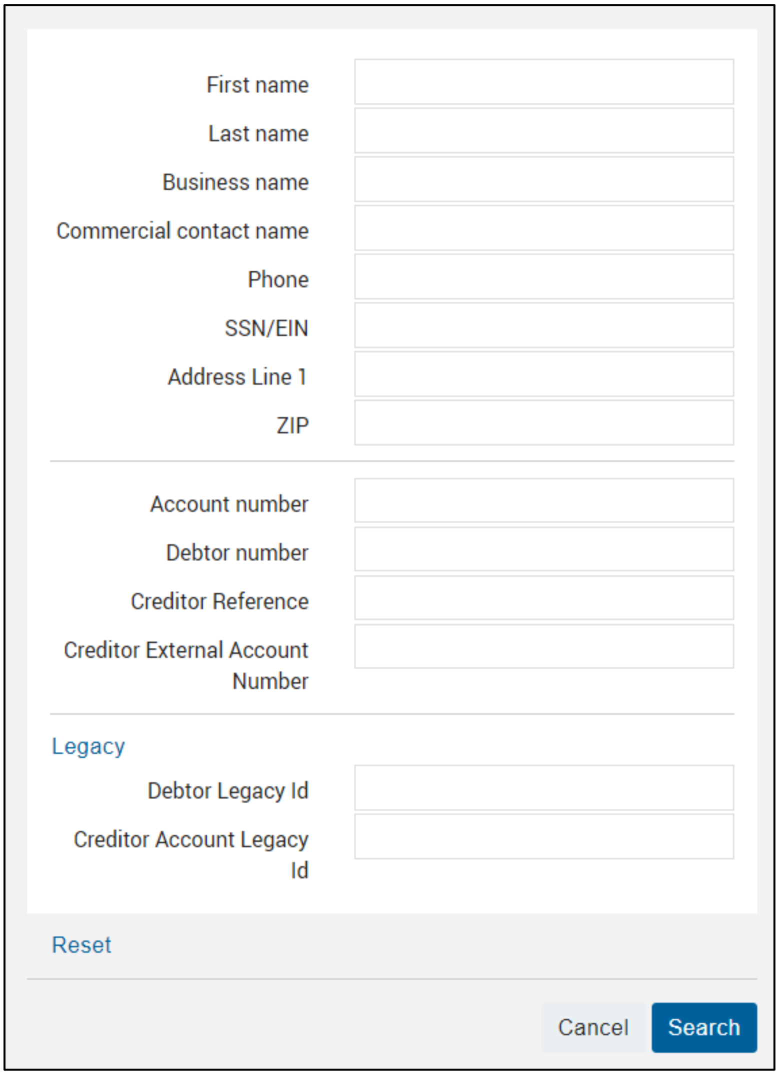
If using the Report Name filter, the drop-down will have to be set to blank to remove the filter.



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 Search from the top banner to display all search options.



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

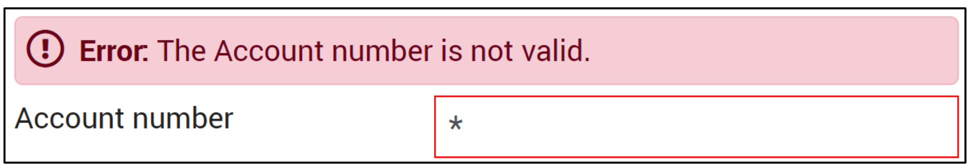
Wildcard Search

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:

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.

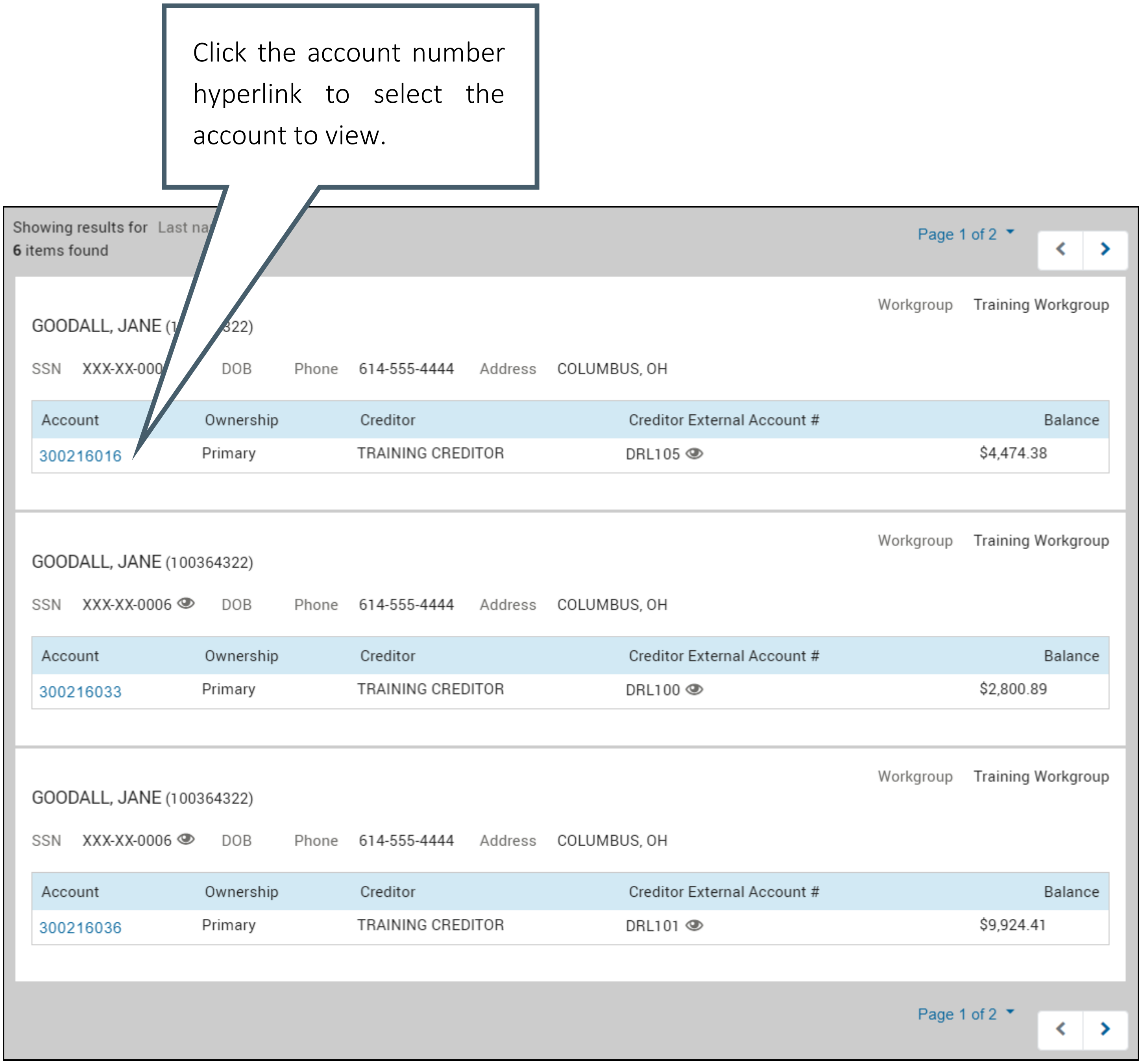
Wildcard searches cannot be performed on numeric fields, like SSN, Account Number, or Debtor Number.



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.



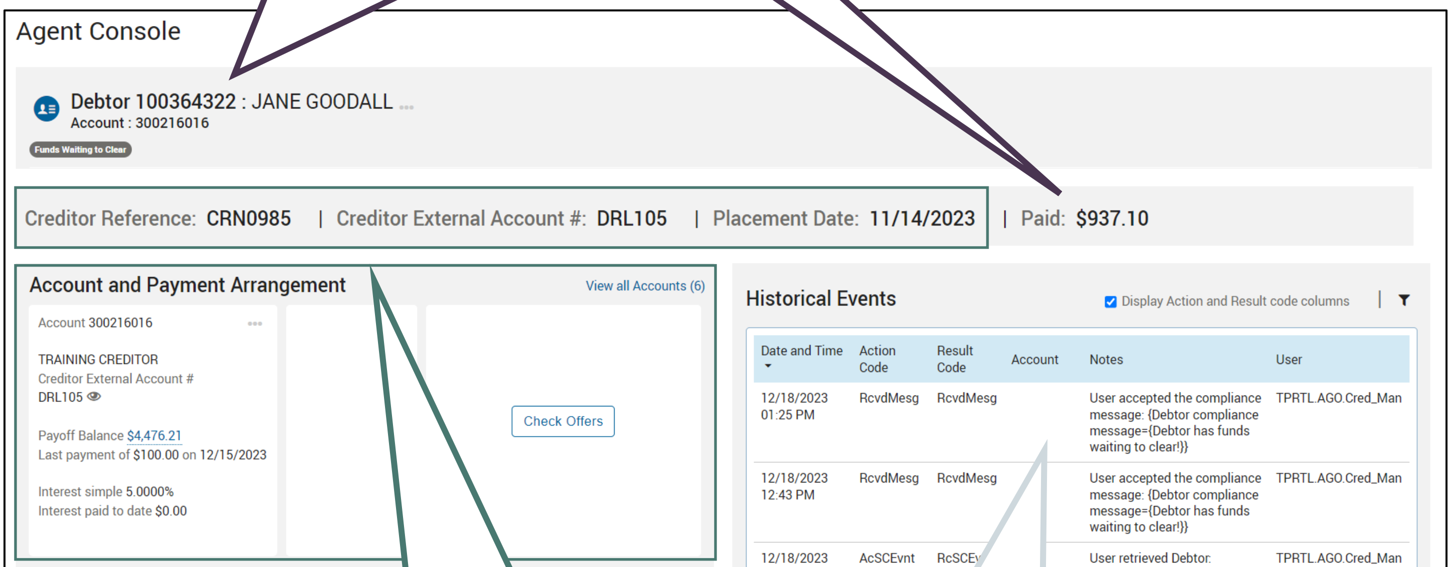
General Navigation

<	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.



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.

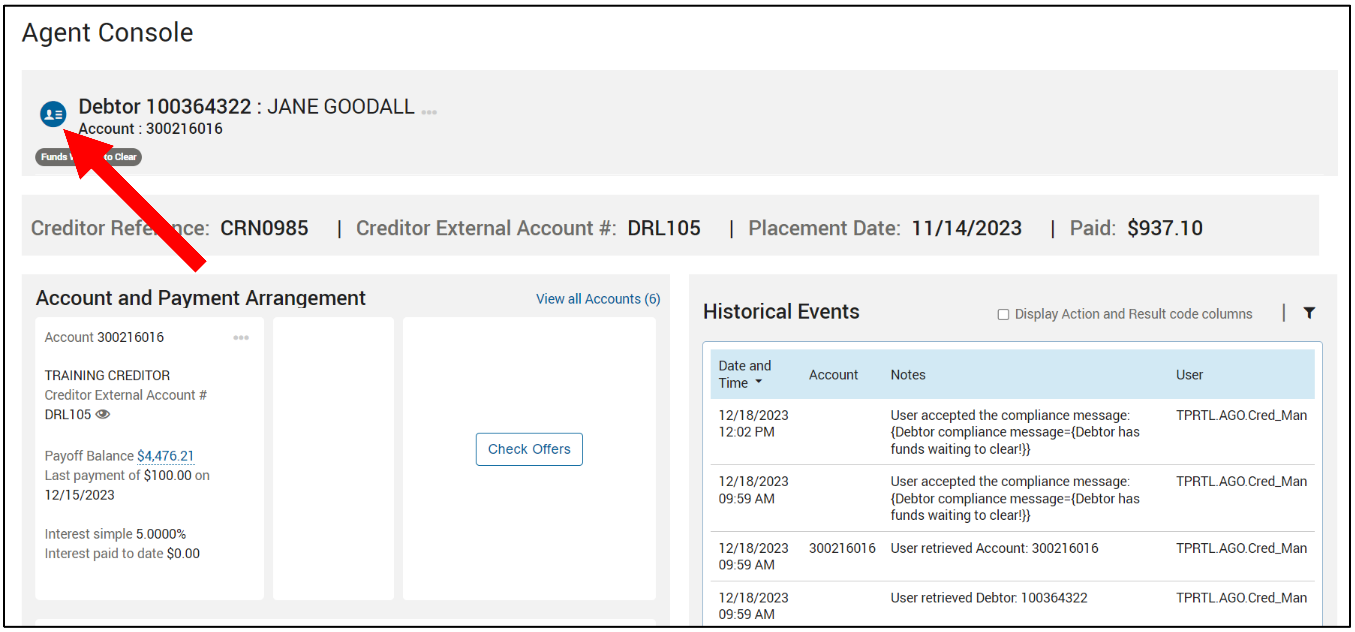
All account and debtor notes.

Details for adding notes can be found here.

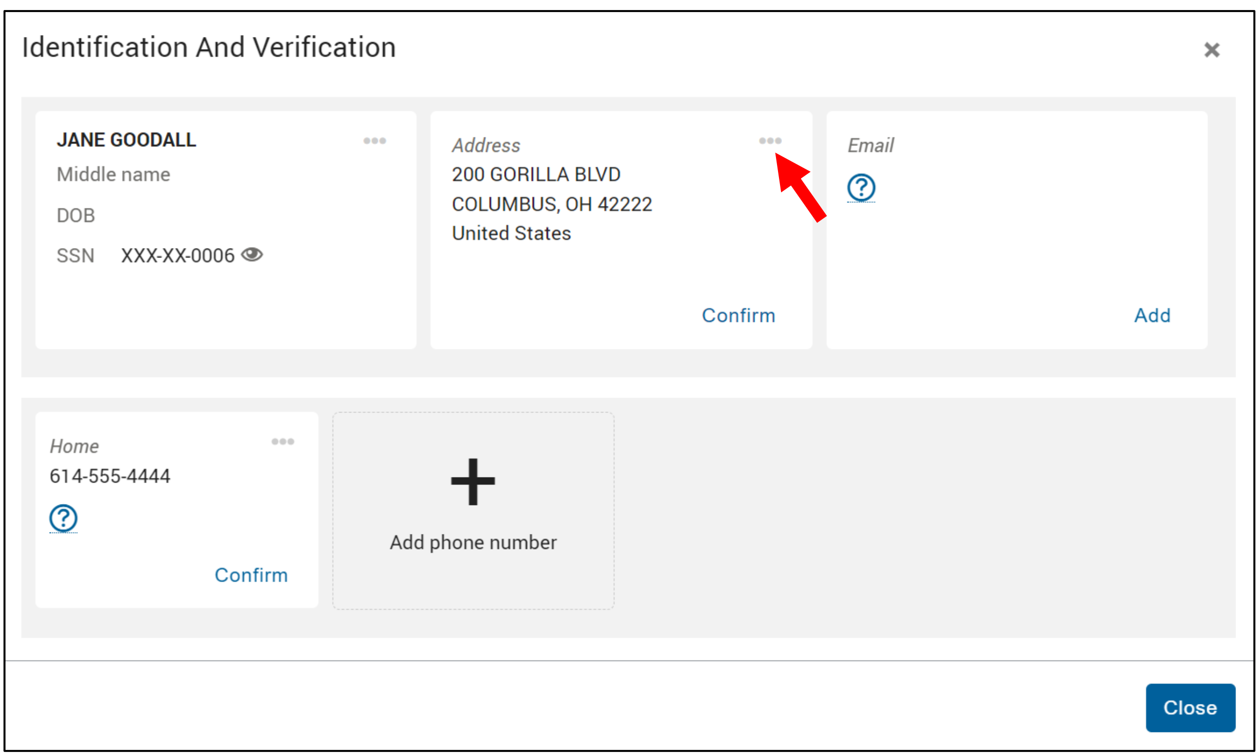
Updating Debtor Contact Information

Edit Address, Phone Numbers, or Email

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

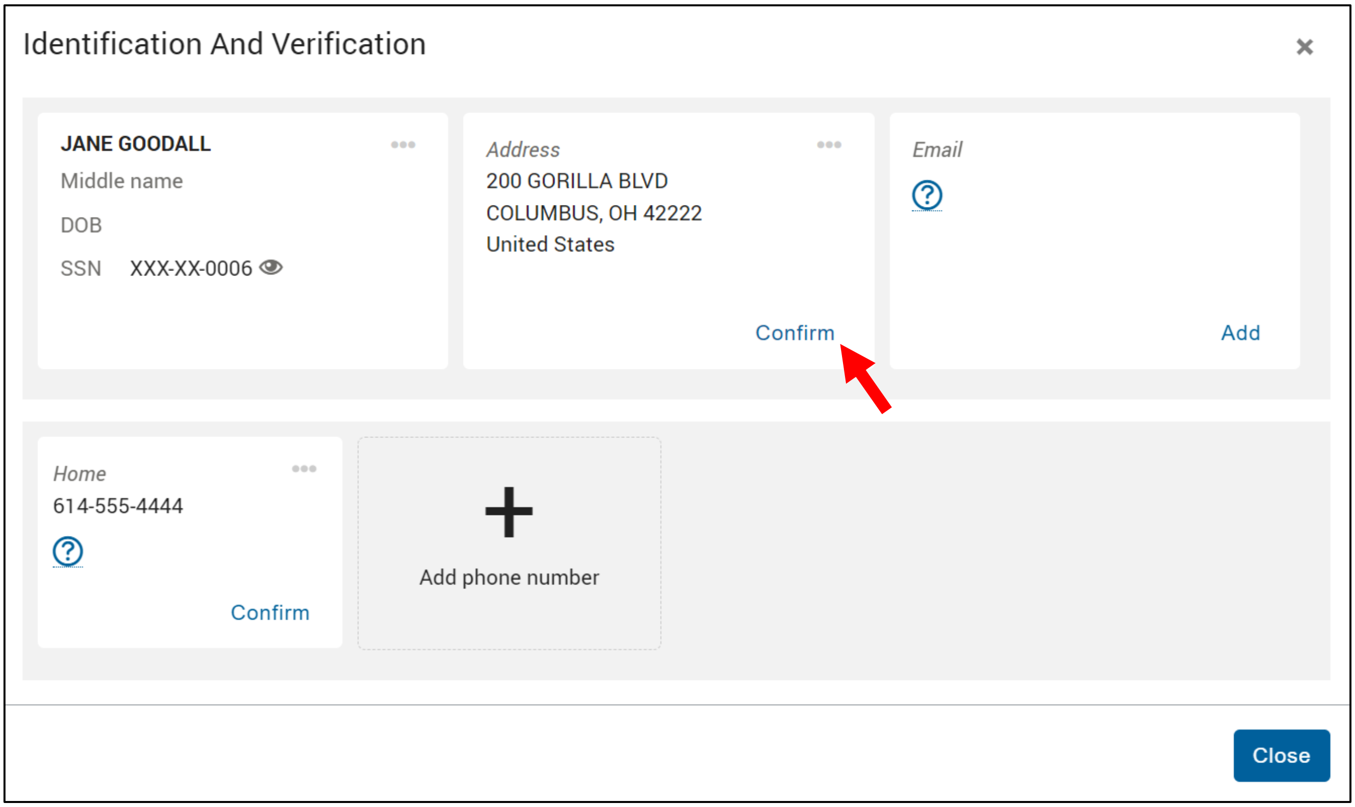


2. Select the ellipses next to an existing piece of information to Edit or Remove.



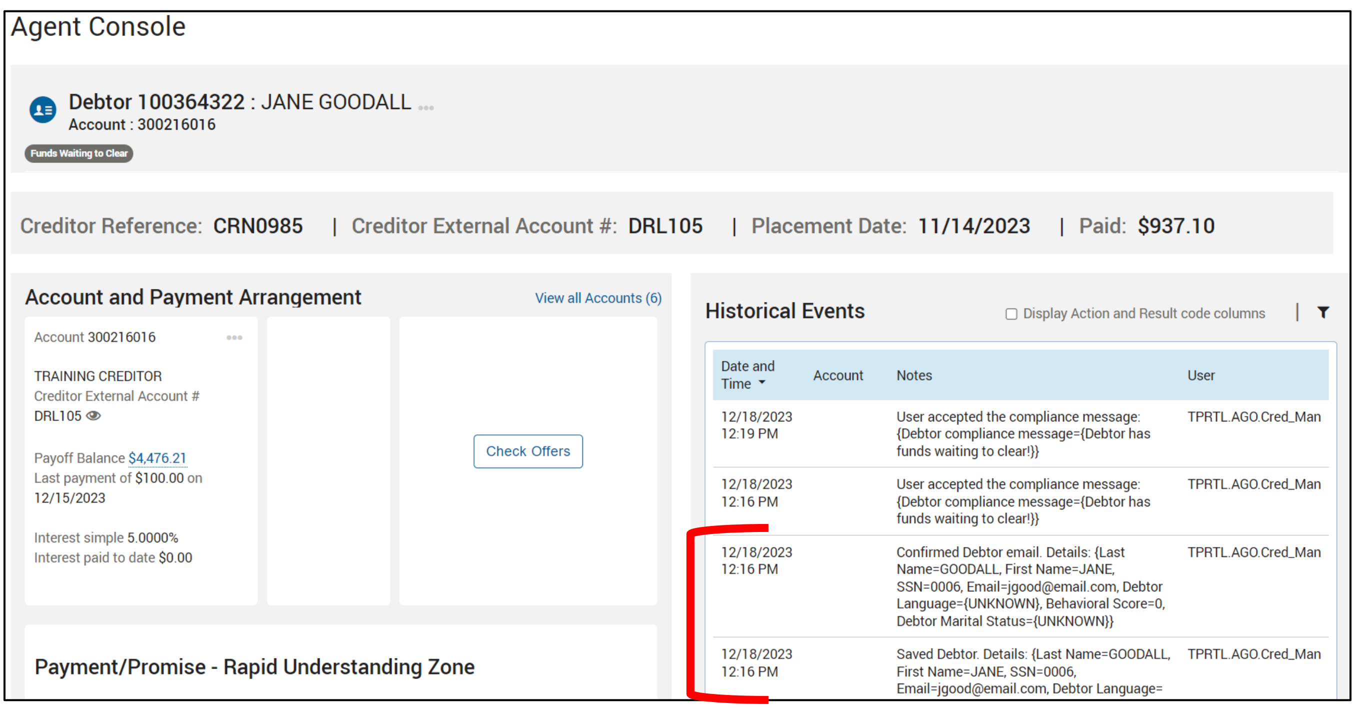
New information can be added by selecting the **Add** button.

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



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

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



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.

Historical Events

Display Action and Result code columns

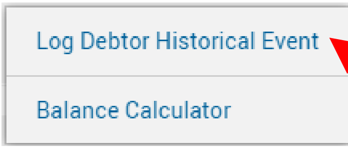
Date and Time	Account	Notes	User
12/20/2023 01:17 PM		Placing notice request. Template: LTPYSMAC, Document Template Short Name: LTPYSMAC, Regarding Debtor number: 100364322, Requester name: LTrujillo, Request Date: 12/20/23, Print Type: Internal, Recipient Id: 100364322, Recipient Type: CONSUMER, Delivery 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

Page 1 of 23

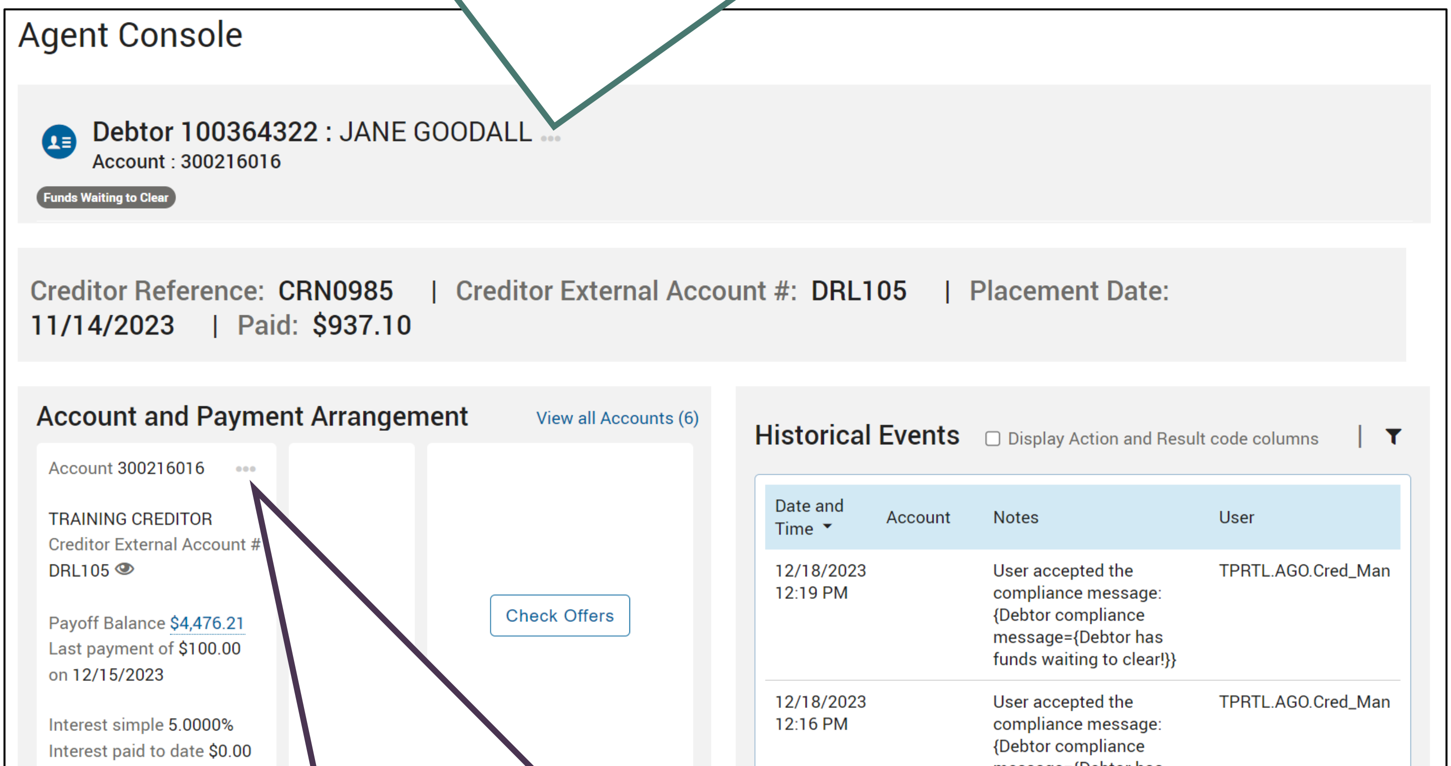
Ten rows of notes will display at a time. Use the filter to look for a specific date range or use the arrows to page through.

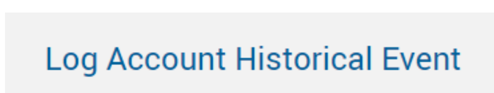
Adding a Note

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.

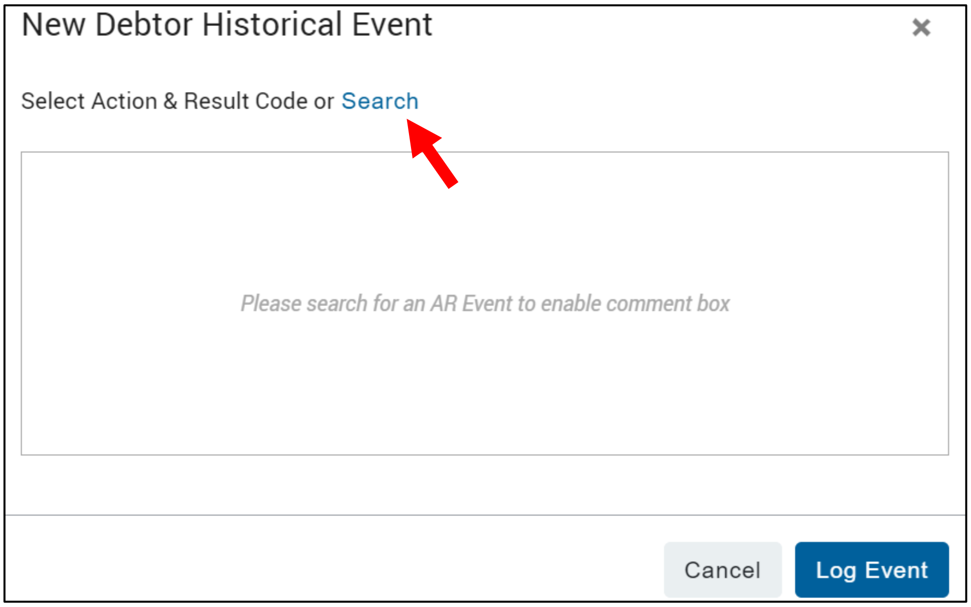




COMMENT / COMMENT is also available at the account level, as well as status update AR events that will add tags to accounts.

A table of available AR events is provided on page 25.

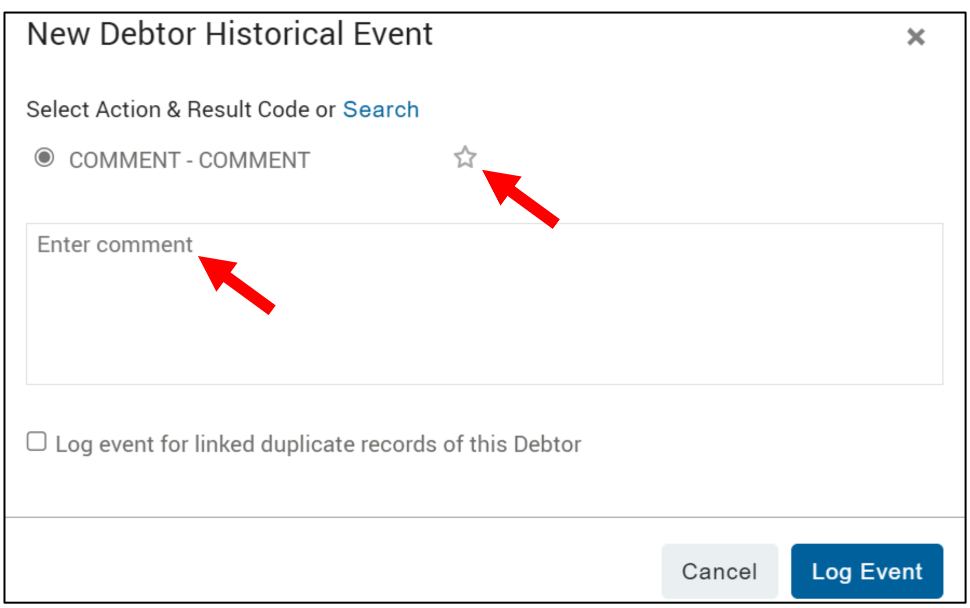
1. Open either the debtor menu or account menu option and select **Log Historical Event**.
2. Select **Search** (or choose a previously favorited combination).



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



Receiver AR Events

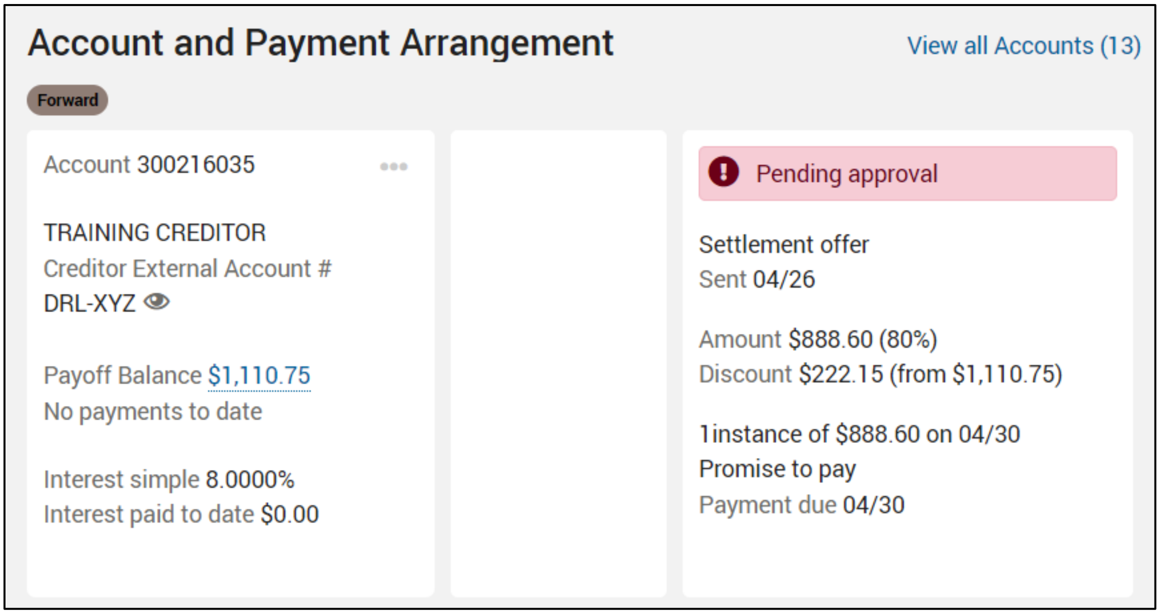
Debtor-level AR Events	
COMMENT / COMMENT	Add general notes to all the debtor's accounts

Account-level AR Events	
COMMENT / COMMENT	Add general notes to the account
RCVRUPDT / ACTDUTY	Adds Active Duty **debtor** tag
RCVRUPDT / DECEASED	Adds Deceased **debtor** tag
RCVRUPDT / DISPUTE	Adds Dispute **account** tag
RCVRUPDT / FRAUDHLD	Adds Fraud Hold **account** tag
RCVRUPDT / INCARCTD	Adds Incarcerated **debtor** tag
RCVRUPDT / SCBKYNEW	(SC only) Adds SC BKYNEW **debtor** tag
RCVRUPDT / SCBKYUPD	(SC only) Adds SC BKY Update **debtor** tag & removes SC BKYNEW tag Can be utilized to add notes about updates made to the Bankruptcy UDP
BMVRLS / BMVRLS	(Available only on BMV accounts after the BMVHOLDRELEASE UDP has been completed) Adds a BMVRLS account tag to notify the BMV of a PIF payment in near-real-time

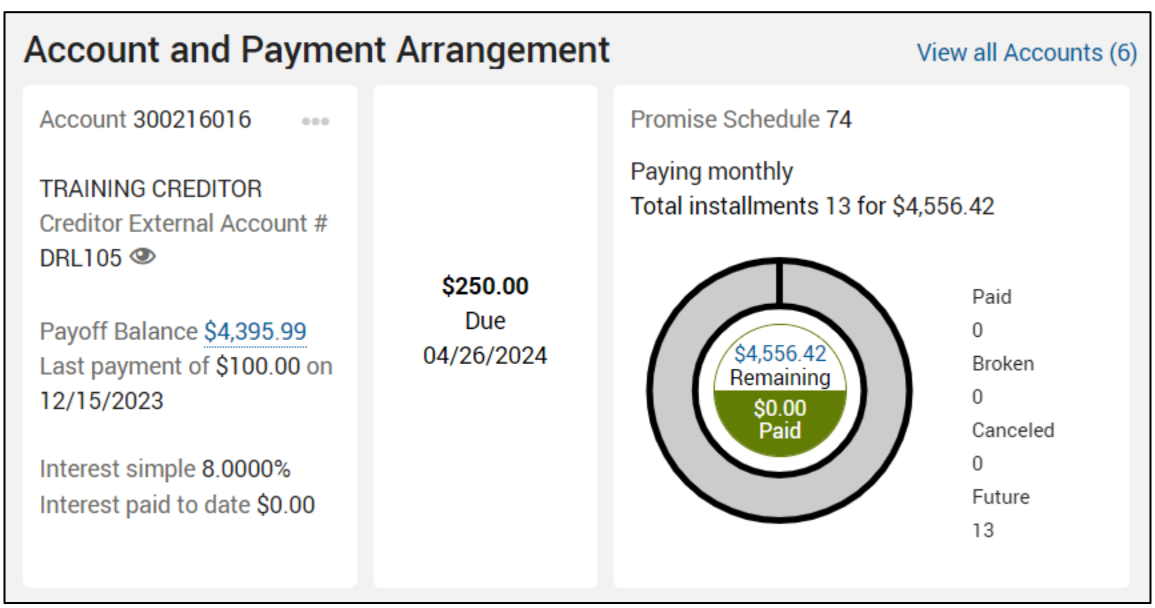
Viewing Settlements or Payment Plans

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.

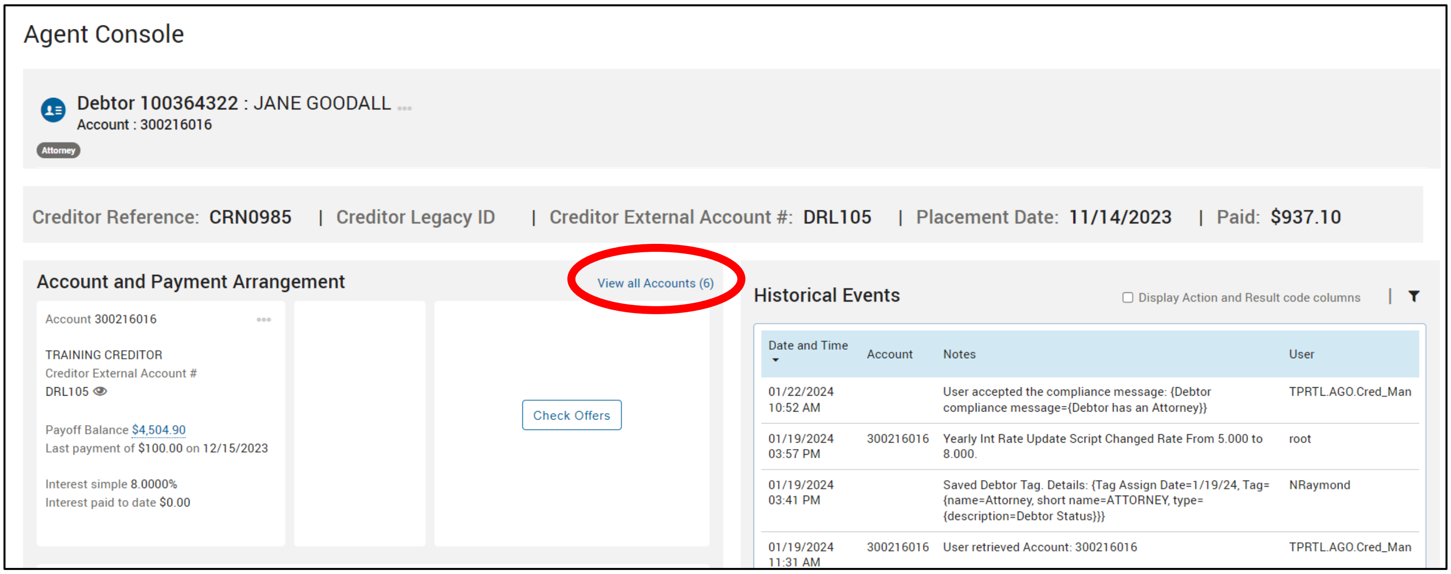


Payment plans and approved settlement offers will display expected payment details.

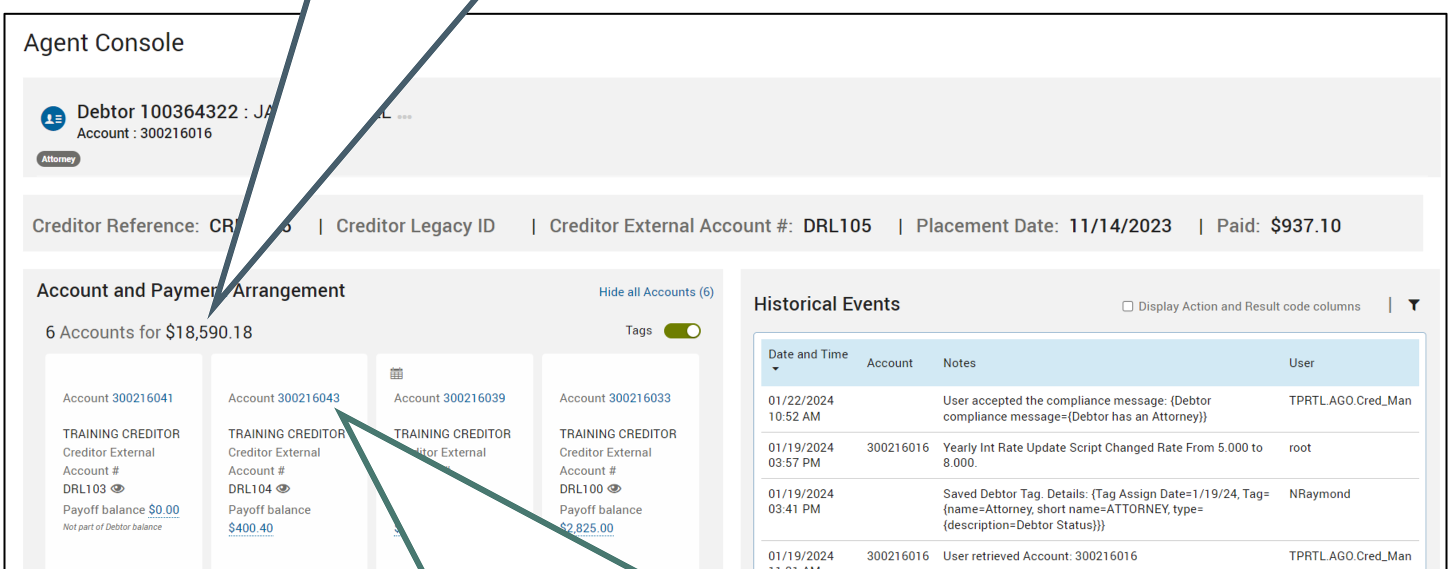


Viewing Additional Accounts Owed by Debtor

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



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

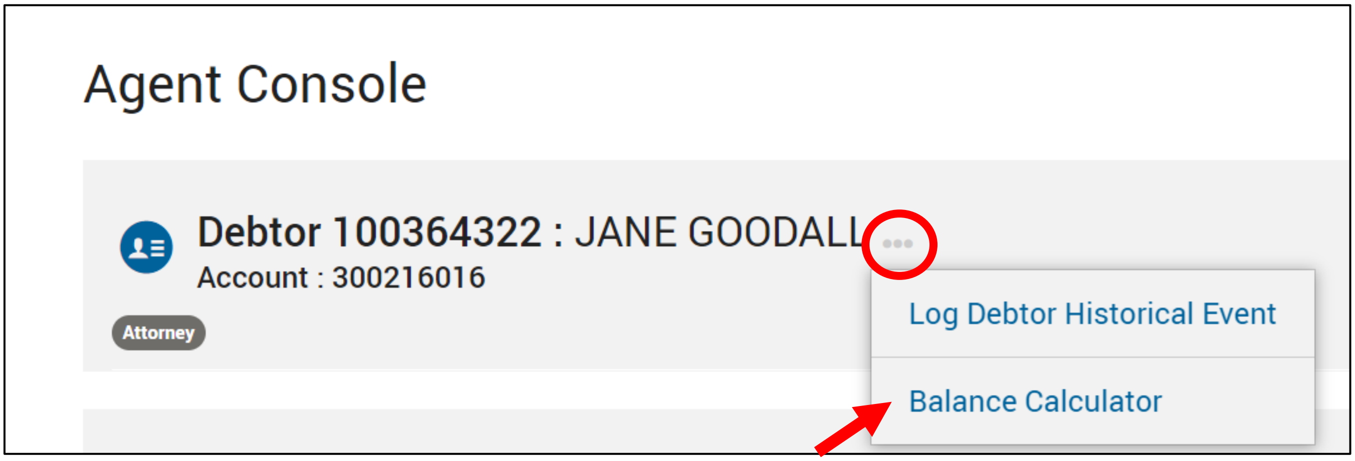


Navigate to another account by clicking the account number hyperlink.

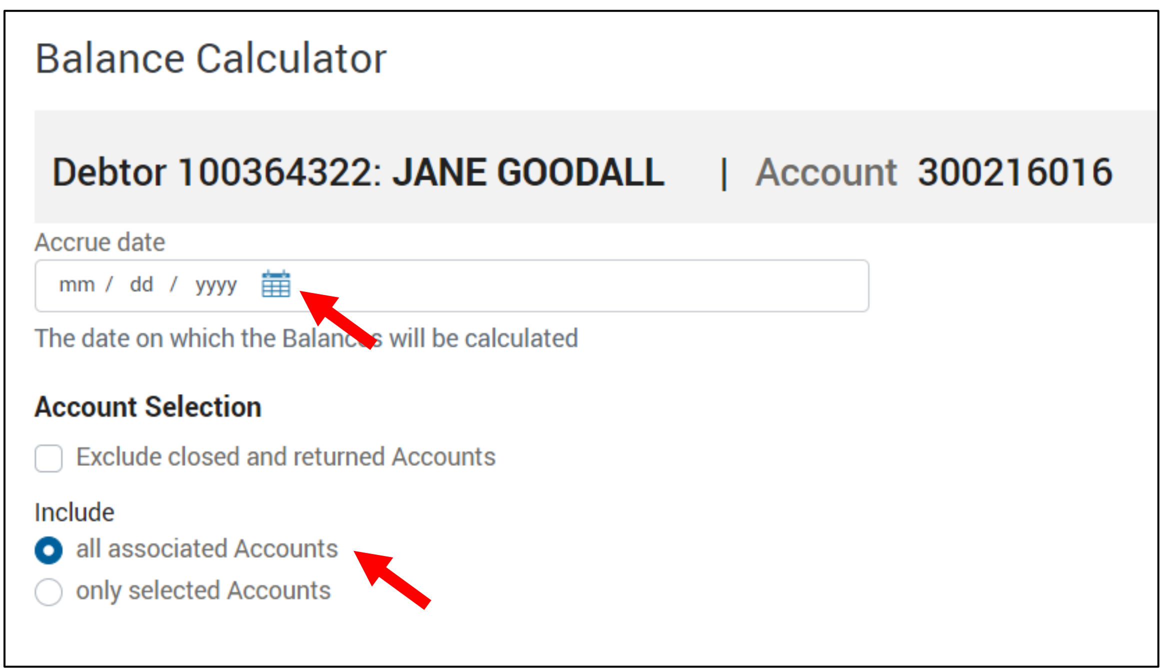
Balance Calculation Tool

Project collection balance for account(s)

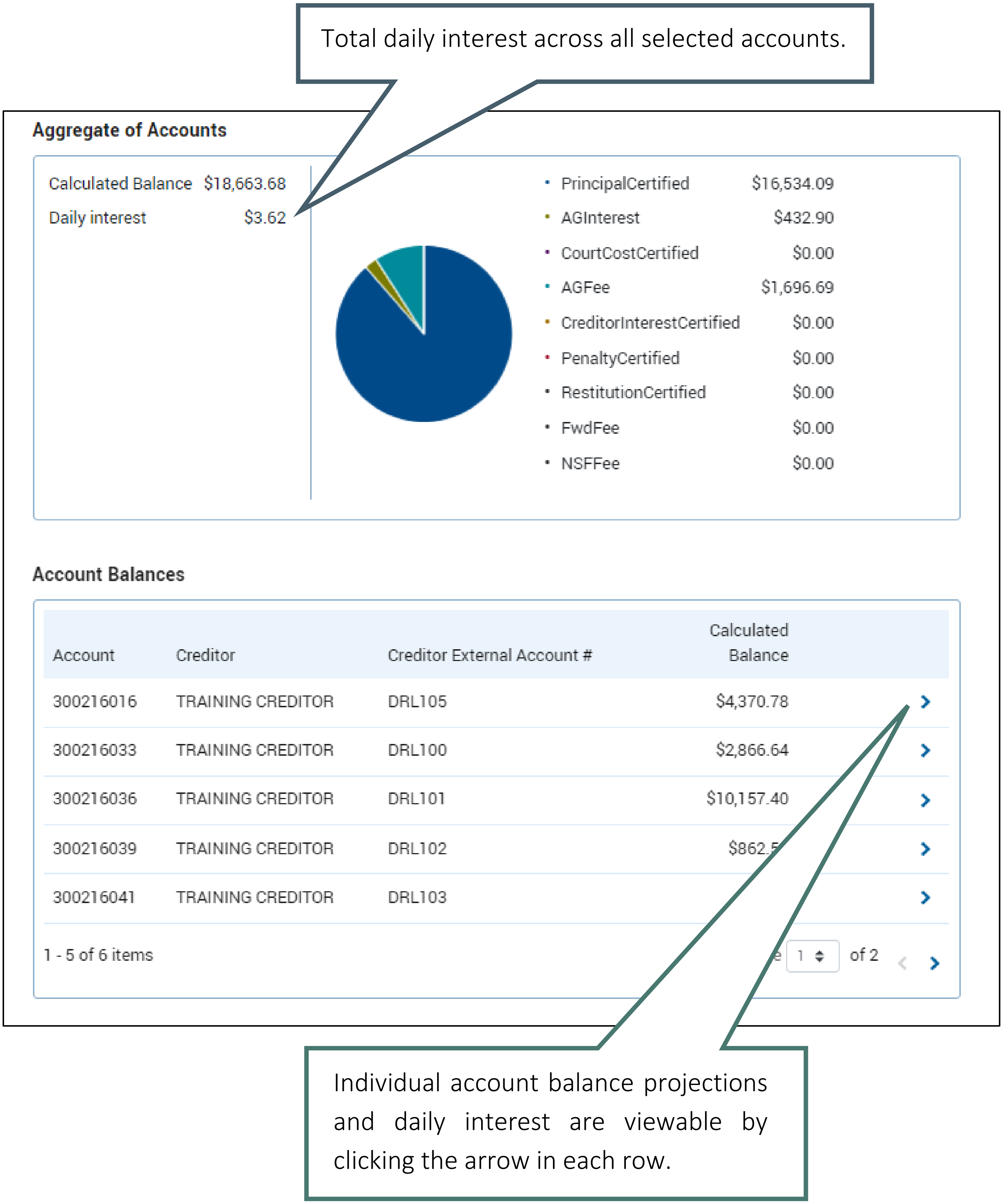
1. From the debtor menu on the Agent Console, select **Balance Calculator**.



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

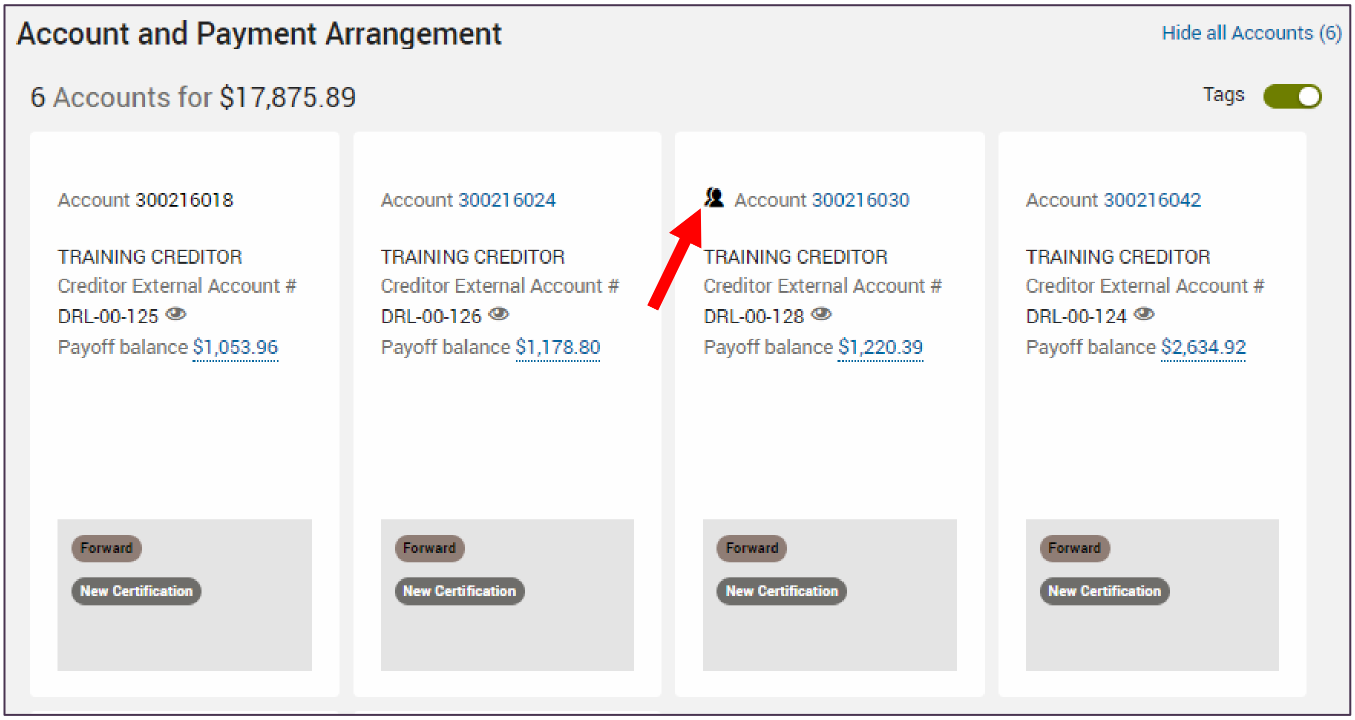


3. Once a date is selected, the projection will populate below.



Accessing Account Joint Owner

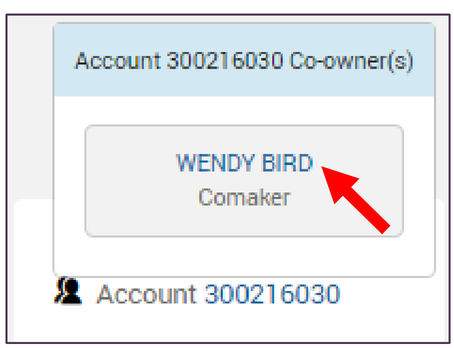
A joint owner is another debtor who can also be held responsible for the account balance owed. If a joint owner exists for an account, it will be indicated by an icon next to the account number.



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.

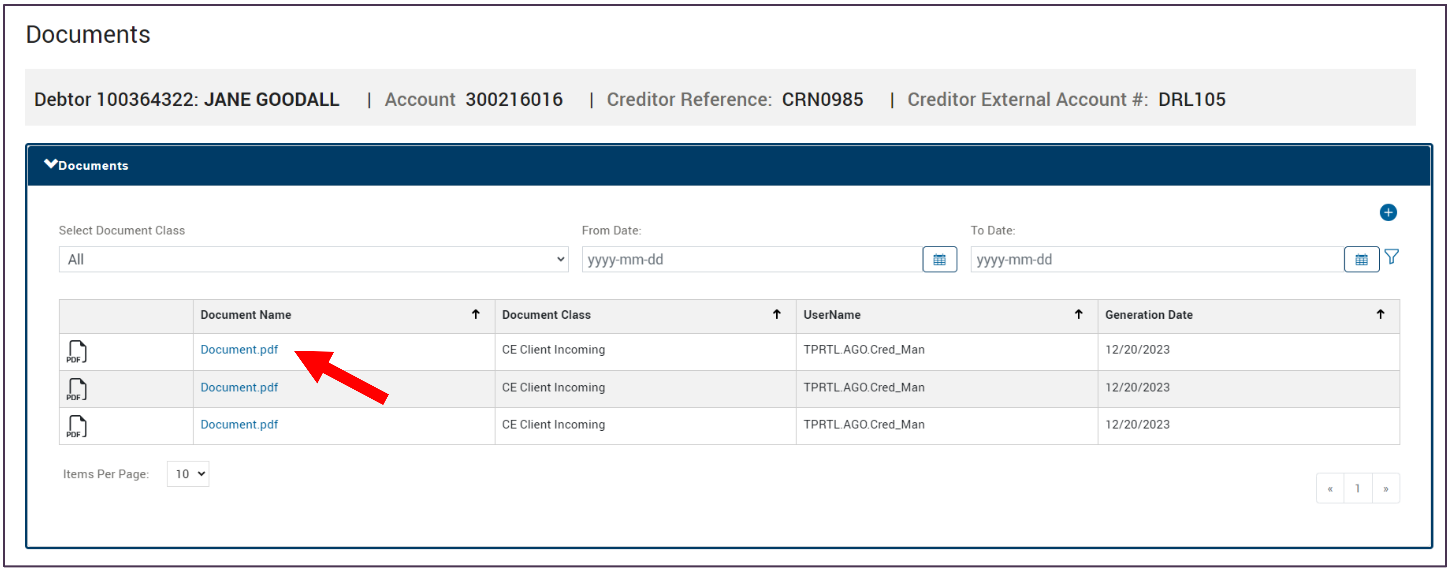
1. Click on the joint owner icon to display the co-debtor's name. Open the co-debtor of the account on the Agent Console by clicking the hyperlinked name.



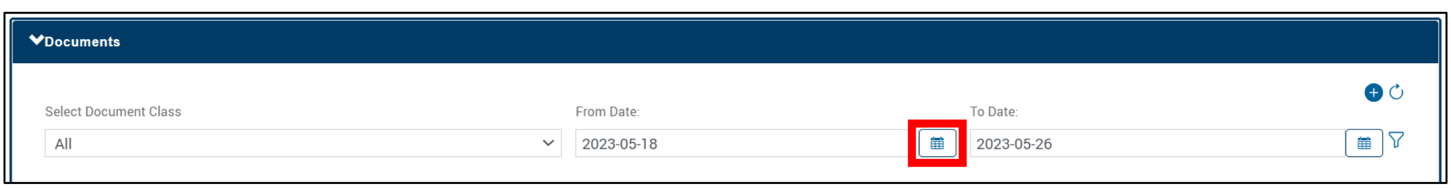
Documents

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.



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.



Note:

To see ALL available documents, set the date range as follows:

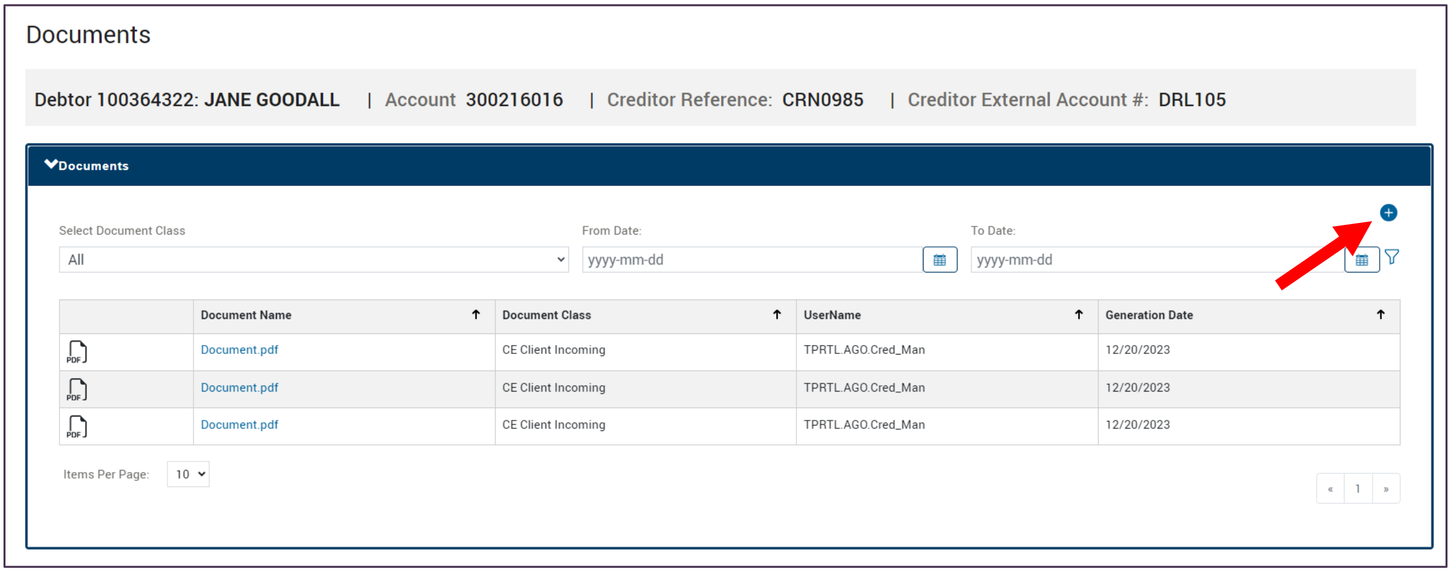
From Date: [set to date account was certified]

To Date: [set to the current date]

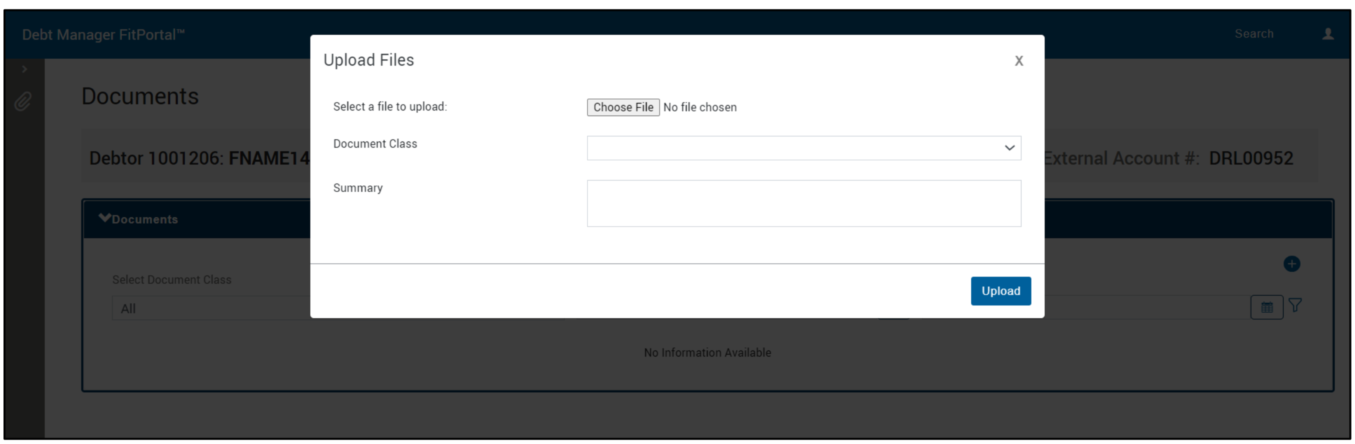
There is NO 2-year date range limit for documents like there is for reports.

Uploading Documents

1. Select the plus icon from the Documents page.



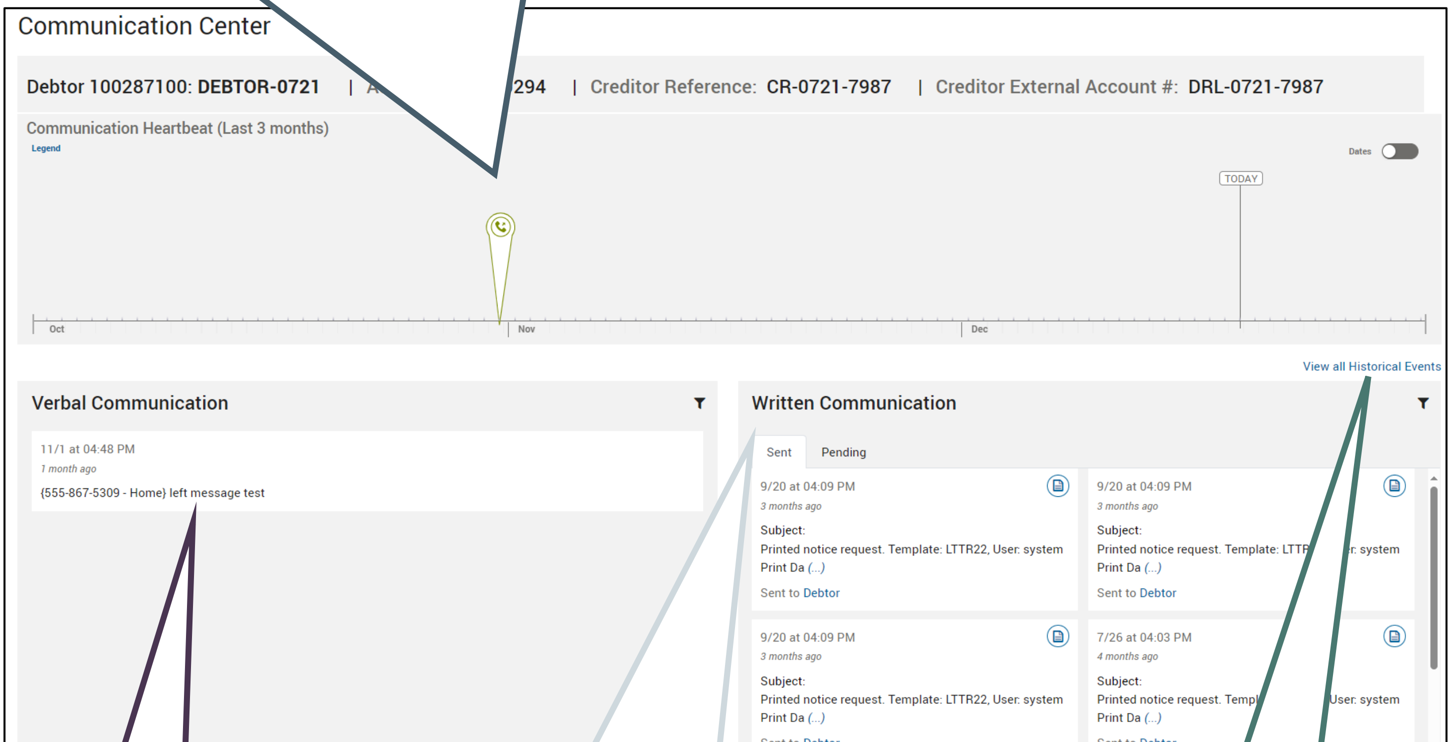
2. Choose the file, select a document class, and provide a summary of the document being uploaded. Click **Upload**.



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.



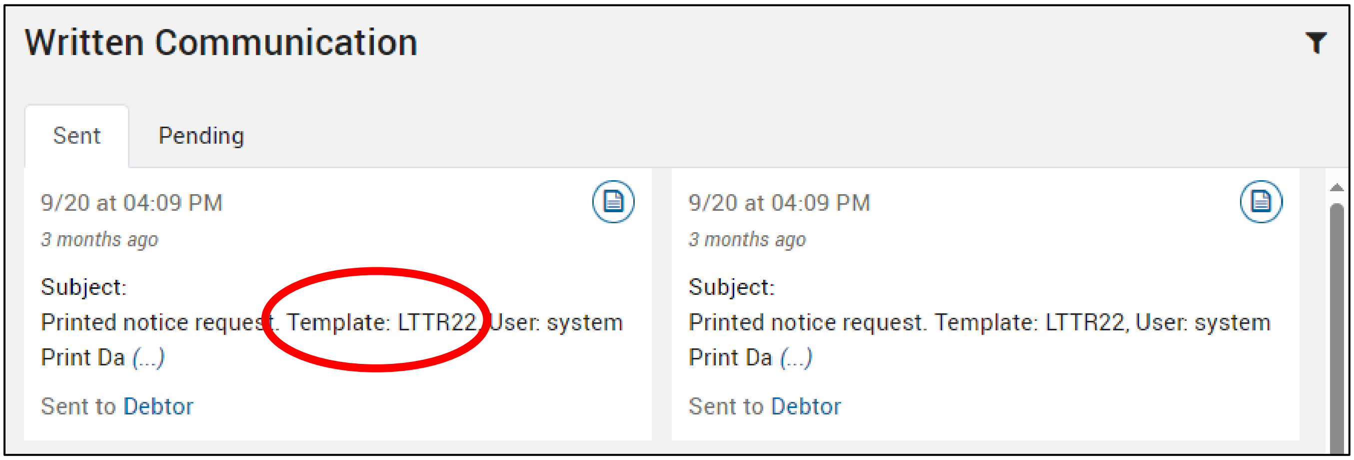
AR events that indicate verbal communication with the debtor will display here. Note: Not all AR events are configured to appear here.

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

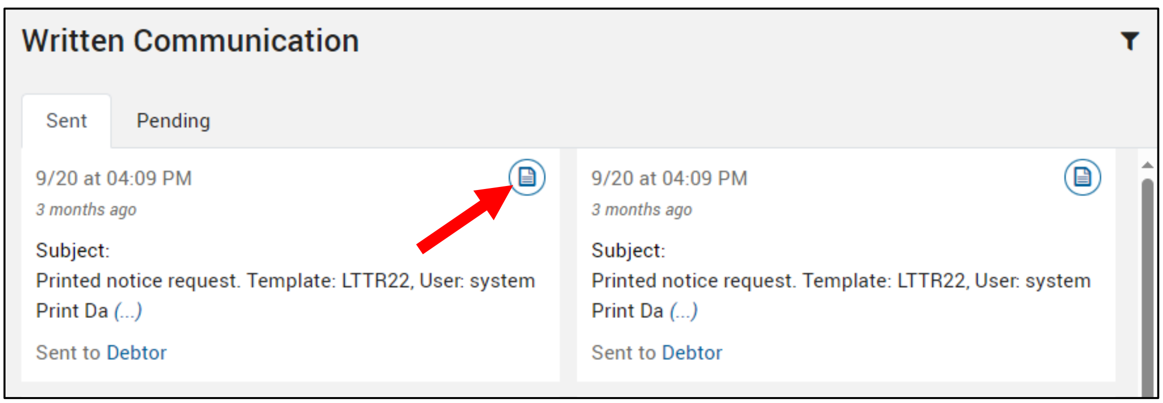
Use the **View all Historical Events** hyperlink as an alternate location to the Agent Console where notes can be read.

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.



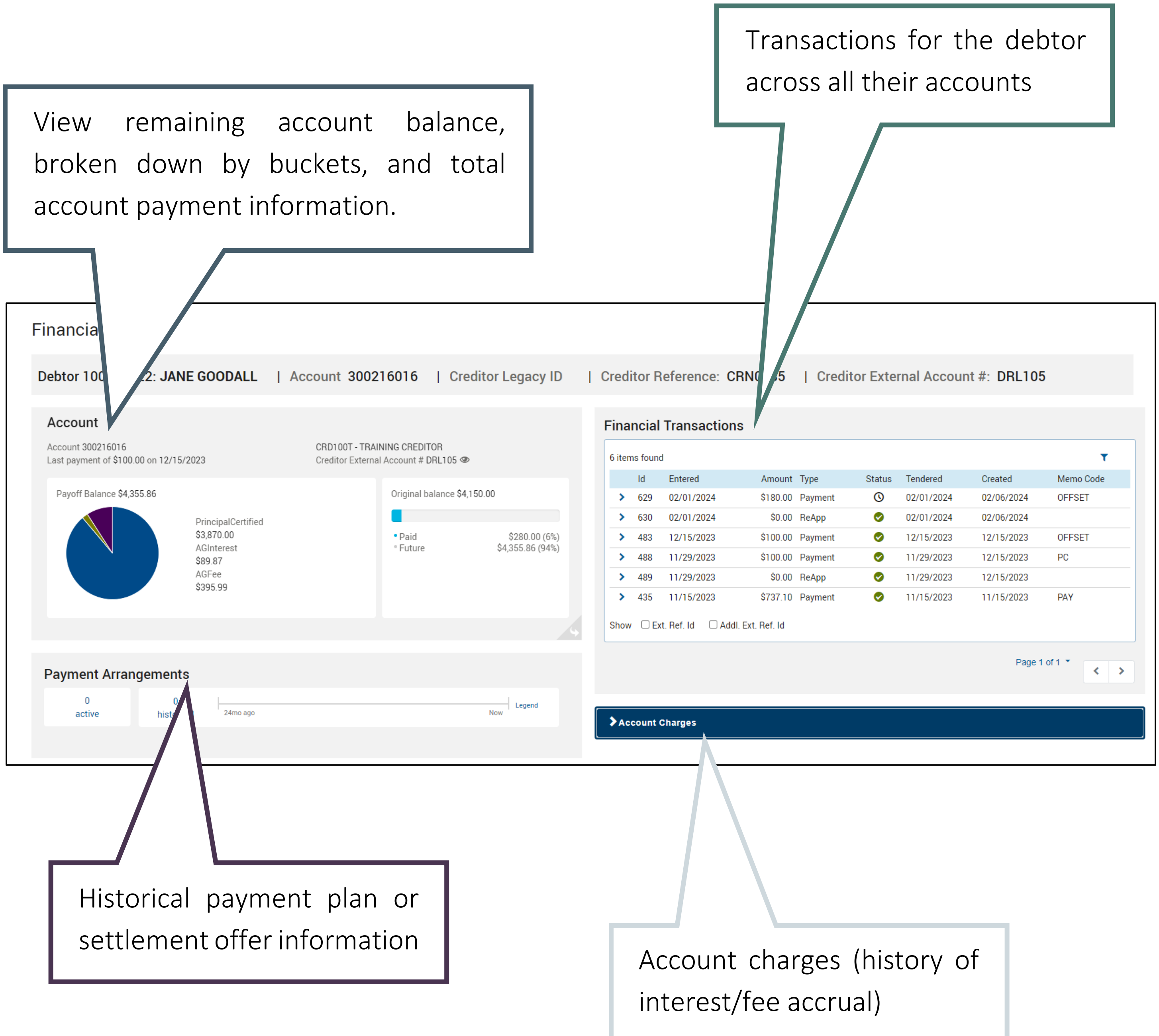
1. From the Written Communication section, click the icon to view a copy of the notice.



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

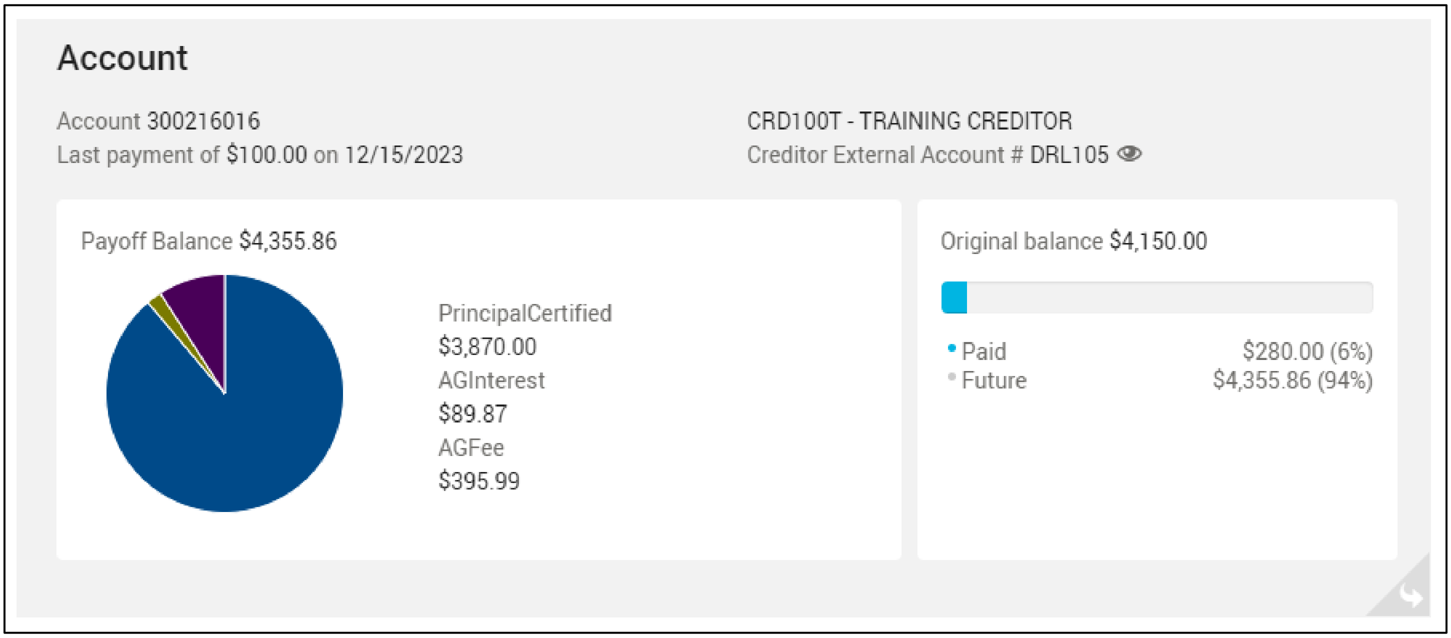
Financial Center

Current account balance, payments, adjustments, and charges can be viewed in detail across different areas of the Financial Center.



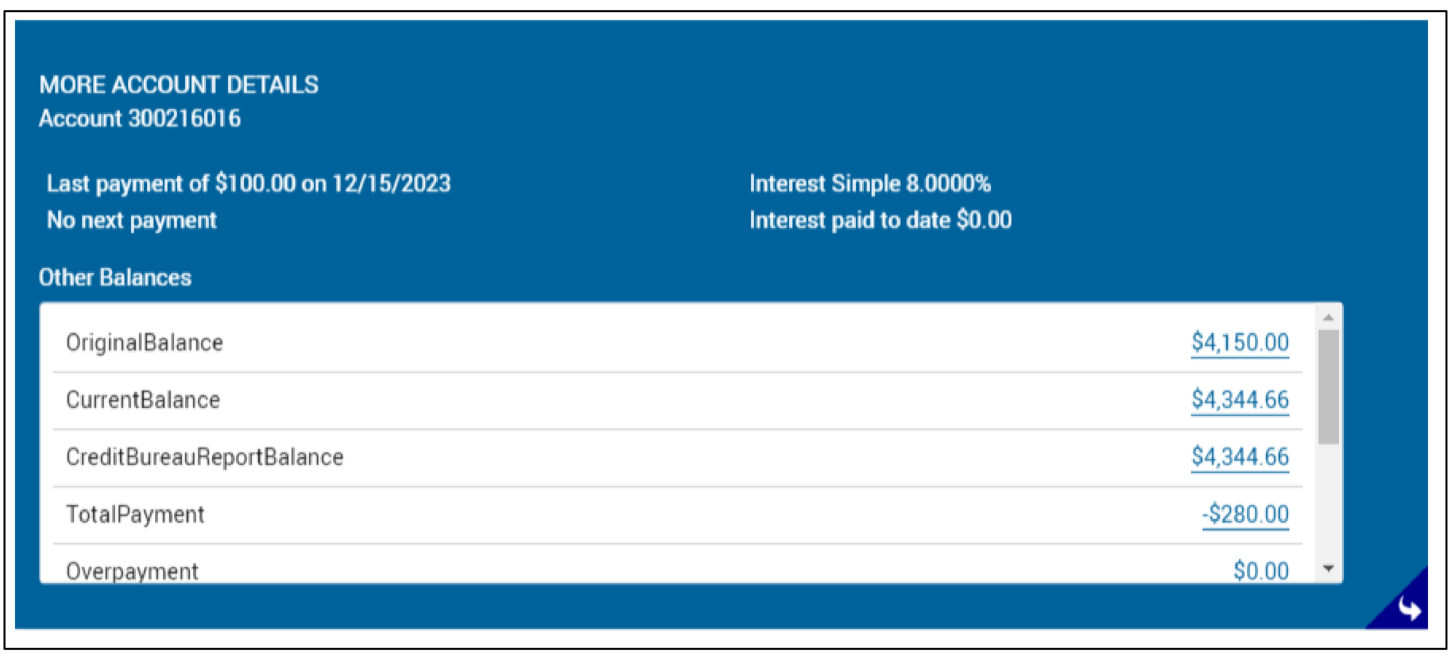
Account Balance Breakdown

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.

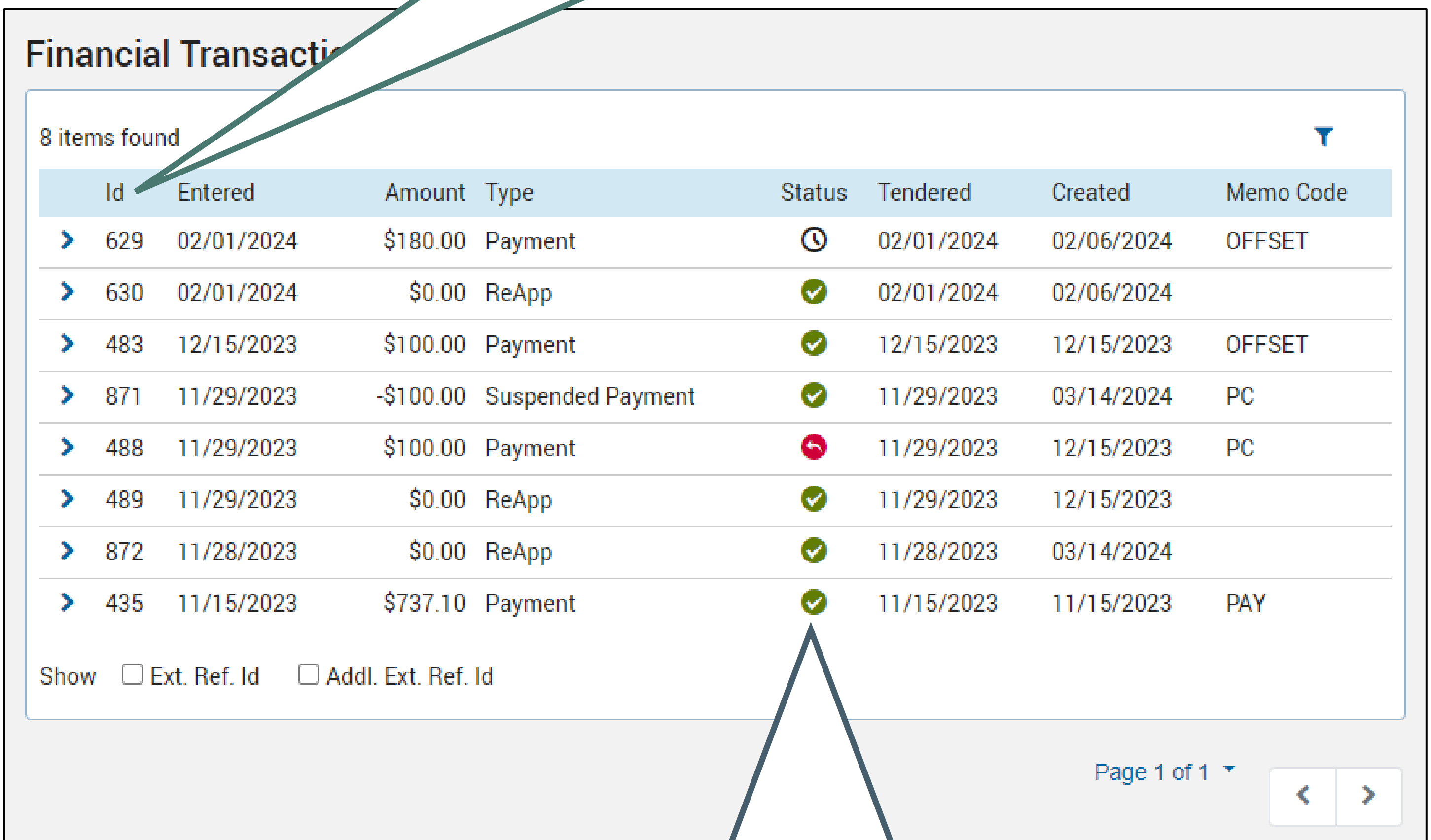
Note: the Current Balance seen here could be slightly different than the Payoff Balance seen on the other side of the card – the difference is the unposted daily interest and fee accrual. The Payoff Balance should be used as the most accurate balance.



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

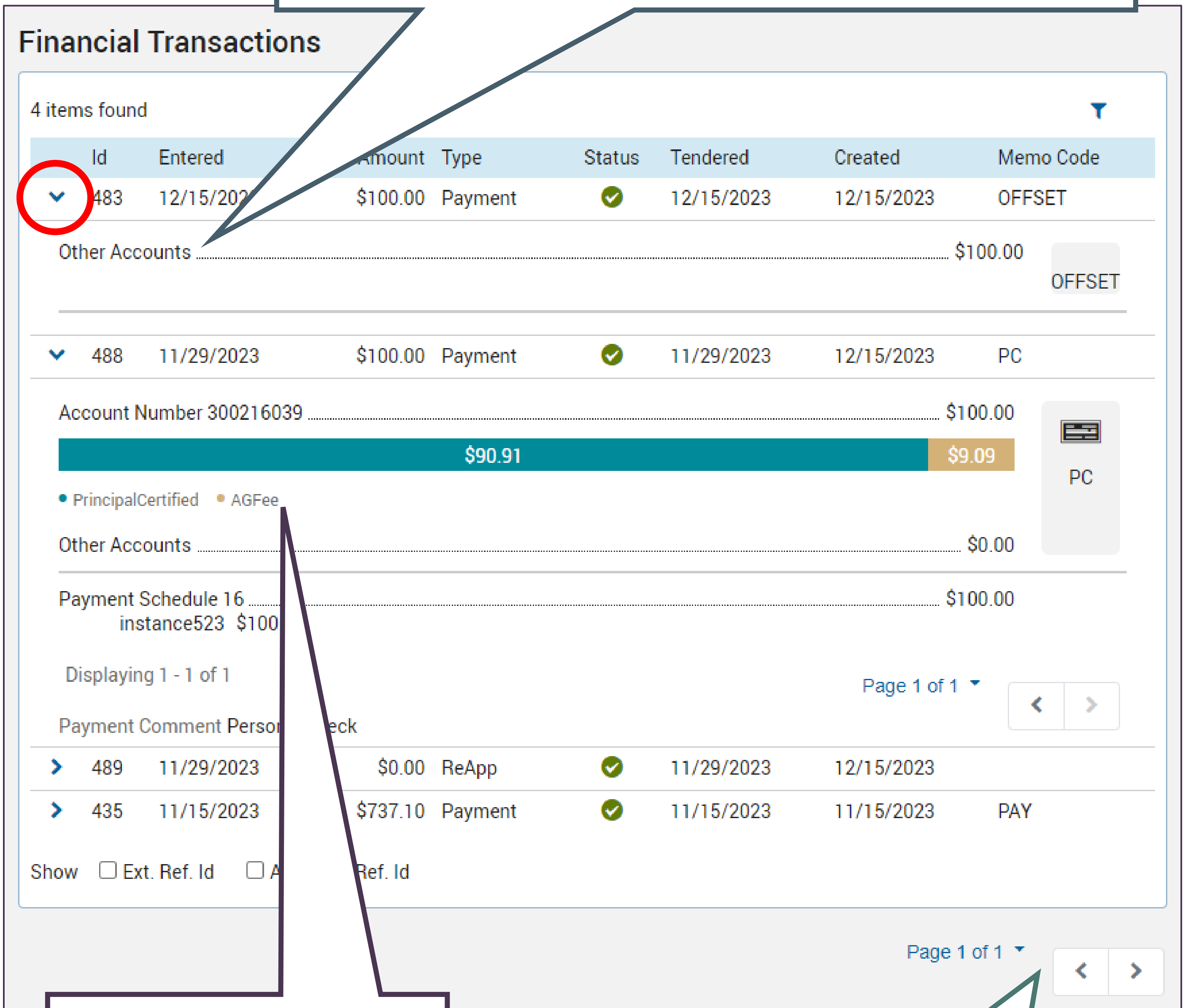
Some of the more common statuses a transaction might have:

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".



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.

For Receivers, this information is also captured in the **Financial Breakdown Report**.

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		

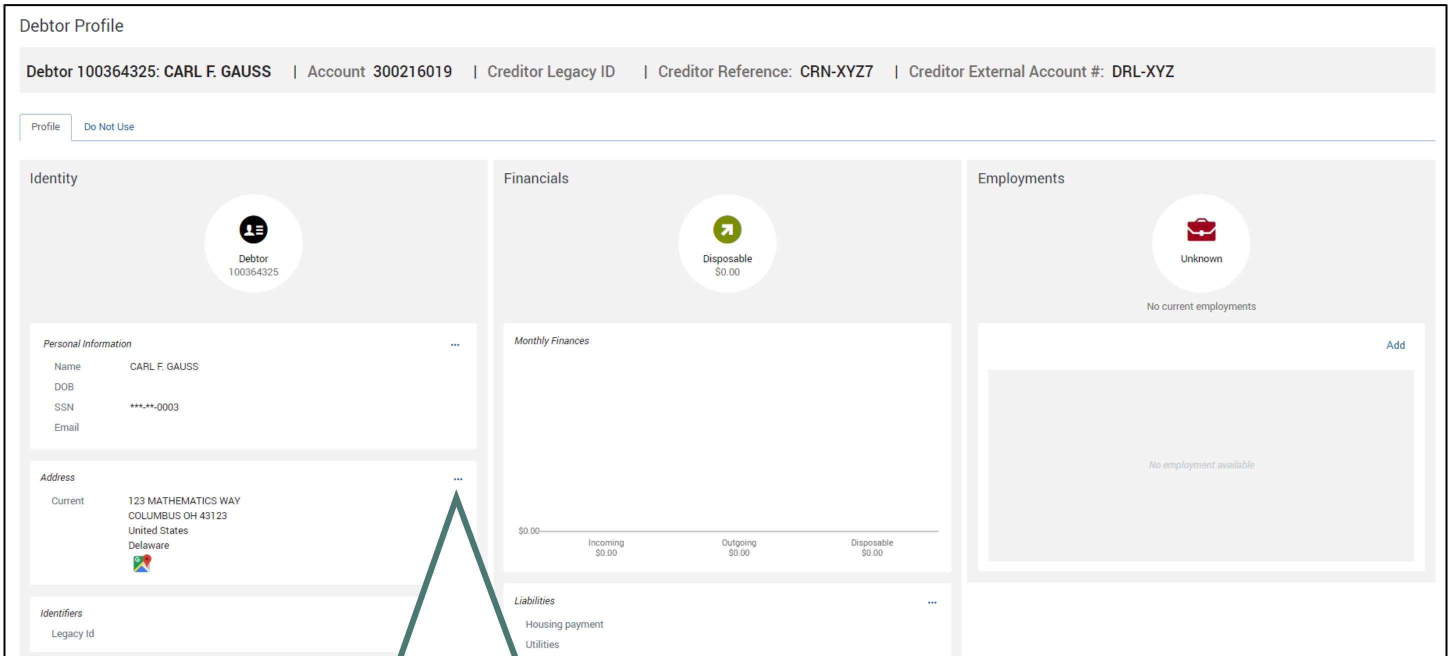
Items Per Page: 10

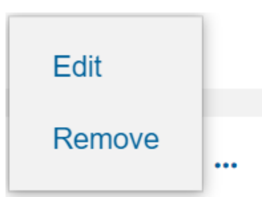
« 1 2 3 »

Placement charges are listed at the time of account certification.

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.





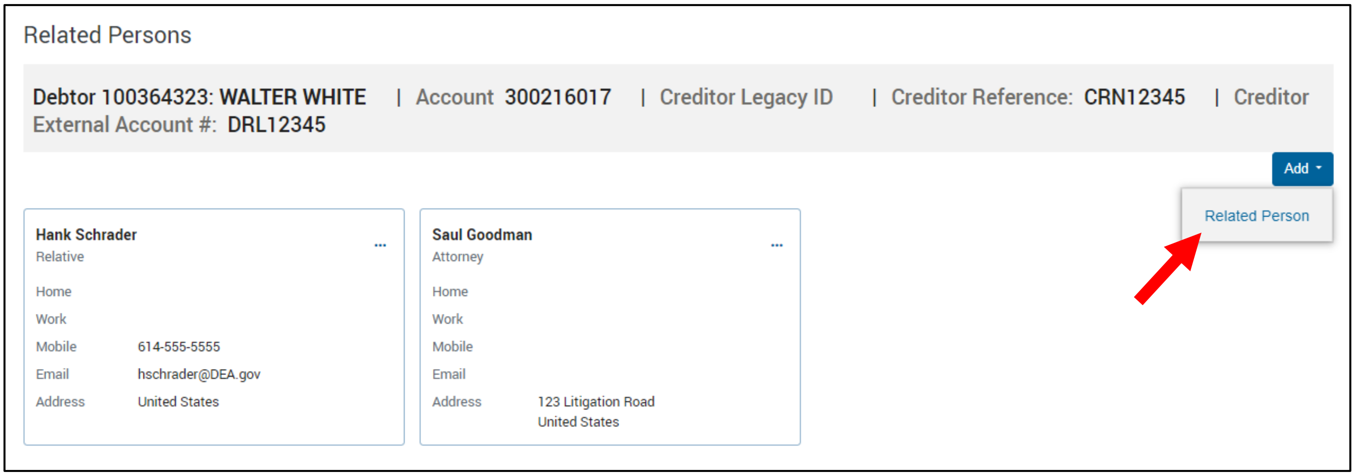
Use the ellipses menu options to edit information as needed.

Related Persons

Adding Related Persons Contacts

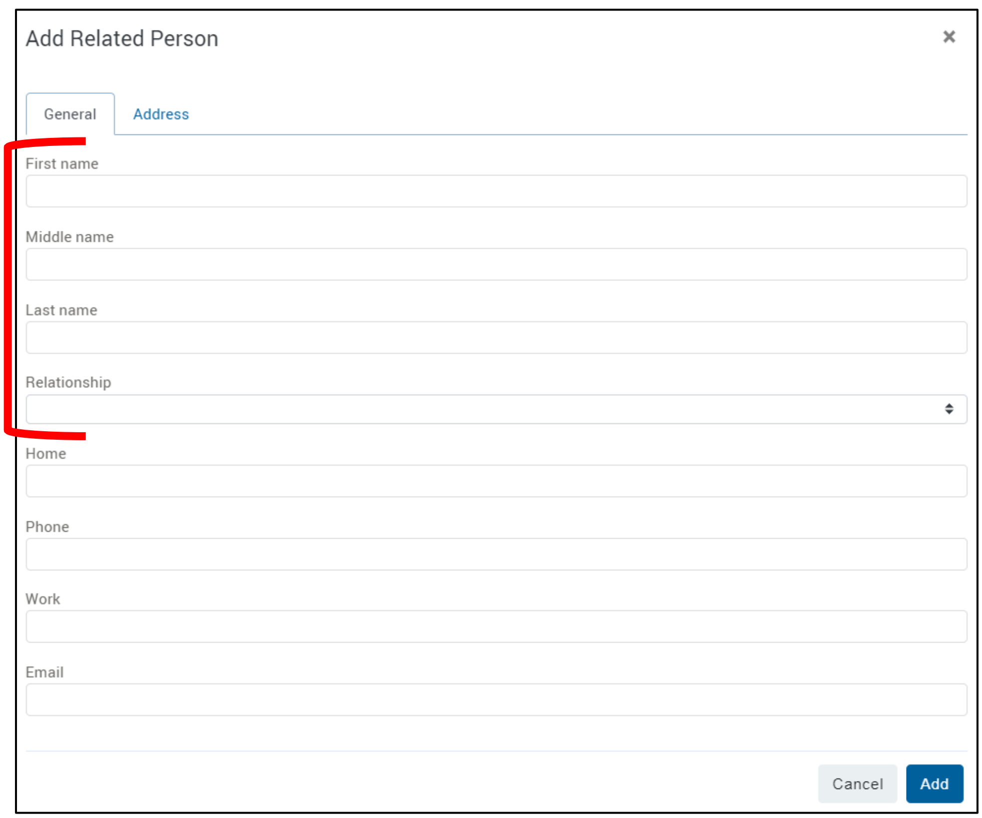
Additional contacts for the debtor, such as attorneys, alternate addresses, or authorized representatives can be added here.

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

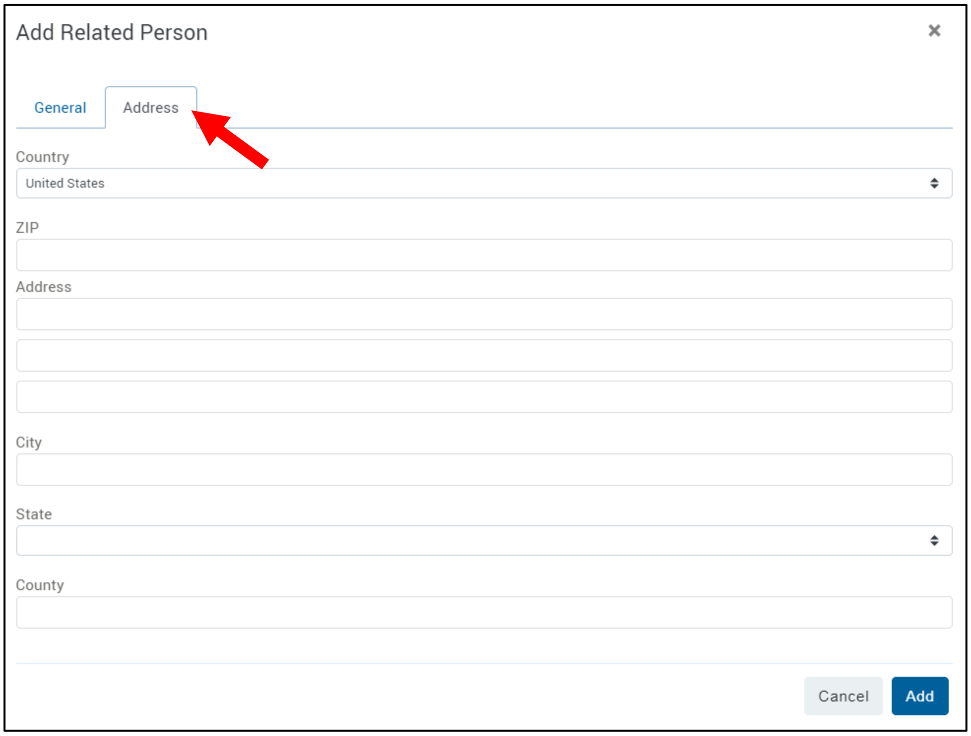


2. Enter the name, select the relationship type.

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



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

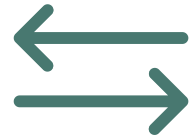


User-Defined Pages

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

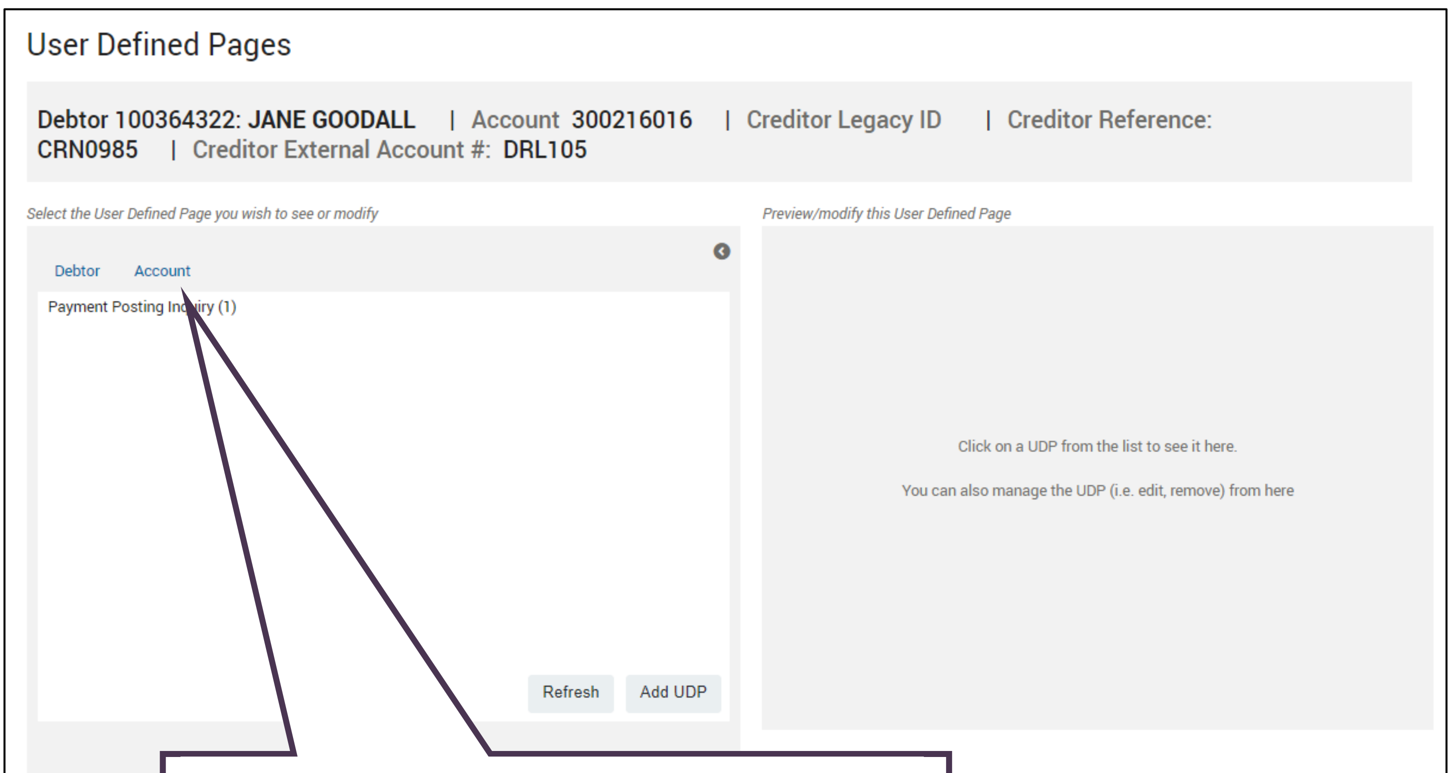
Fillable forms for requests and updates

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.

Receiver UDP Access

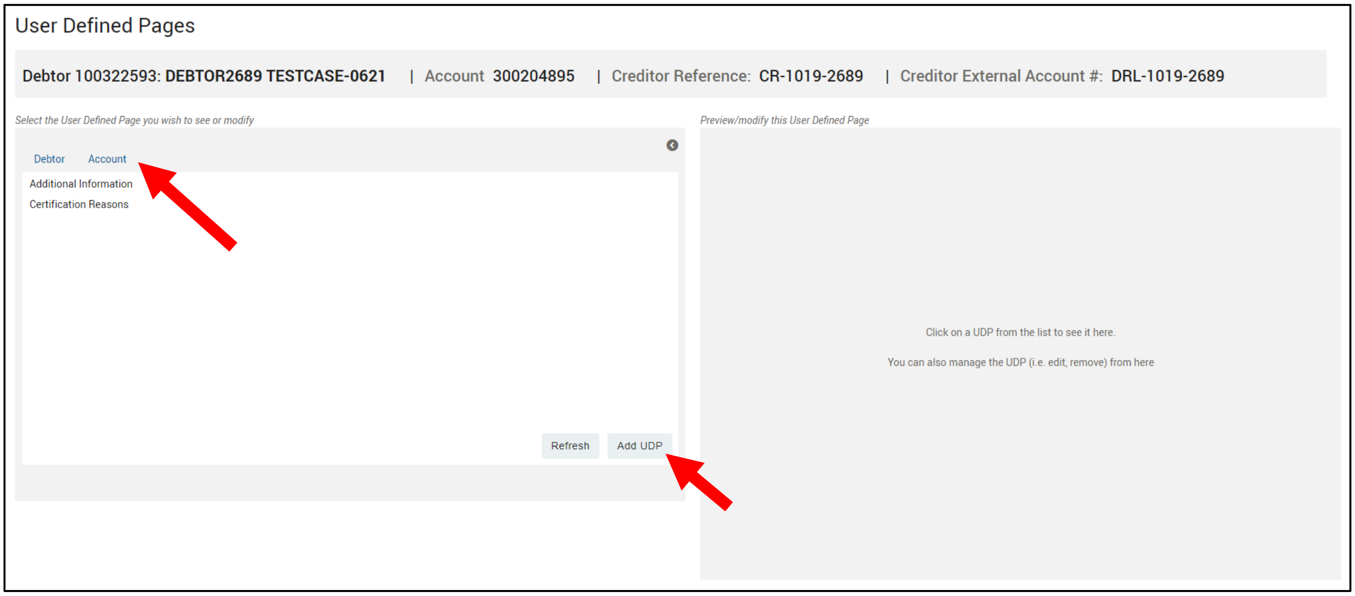
Debtor-level UDPs		
BANKRUPTCY	SC: Write TPV: Read Only	Court case information related to a debtor's bankruptcy proceedings
BUSINESSINFO	Read Only	Additional business demographic information, if available
DEBTORFTI	Read Only	If FTI exists at the debtor level, information in this UDP is configured to 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	SC: Write TPV: Read Only	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 – see instructions for this form
RSTRCTENDRSMN	Read Only	If a check needed to be returned to the debtor because of restricted endorsement, related information is stored here
STOPCANCELSTALEREQ	Read Only	If a check needed to be stopped/marked as stale and reissued, related information is stored here
VOIDREQUEST	Read & Write	Information about a debtor's payment that needs to be voided. An email to the AGO Accounting team should also be sent for a timely response.
WIREINFO	Read & Write	AGO wiring instructions are provided at the bottom of this UDP and details about the payment being wired can be provided so AGO Accounting can post the payment correctly

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 Only	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 & Write	For BMV accounts only – used to provide BMV with payment confirmation information – see instructions for this form
BWCADDTNLINFO	Read Only	BWC policy information
BWCPAYROLLRPT	Read Only	BWC payroll report information
CERTREASON	Read Only	Information provided in the Creditor certification file
JUDGMNTLIEN	SC: Write TPV: 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 Only	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 & Write	If the account is forwarded out to a Receiver and on a payment plan, the details of the plan display here
RECEIVERINQACCT	Read & Write	A fillable form to provide information for AGO's Accounting department to address questions about balances/payments on an account – see instructions for this form
STATUTEOFLIMITATIONS	Manager: Write Agent: Read Only	SOL or Extended SOL date, if available

Reporting BMV PIF Payments

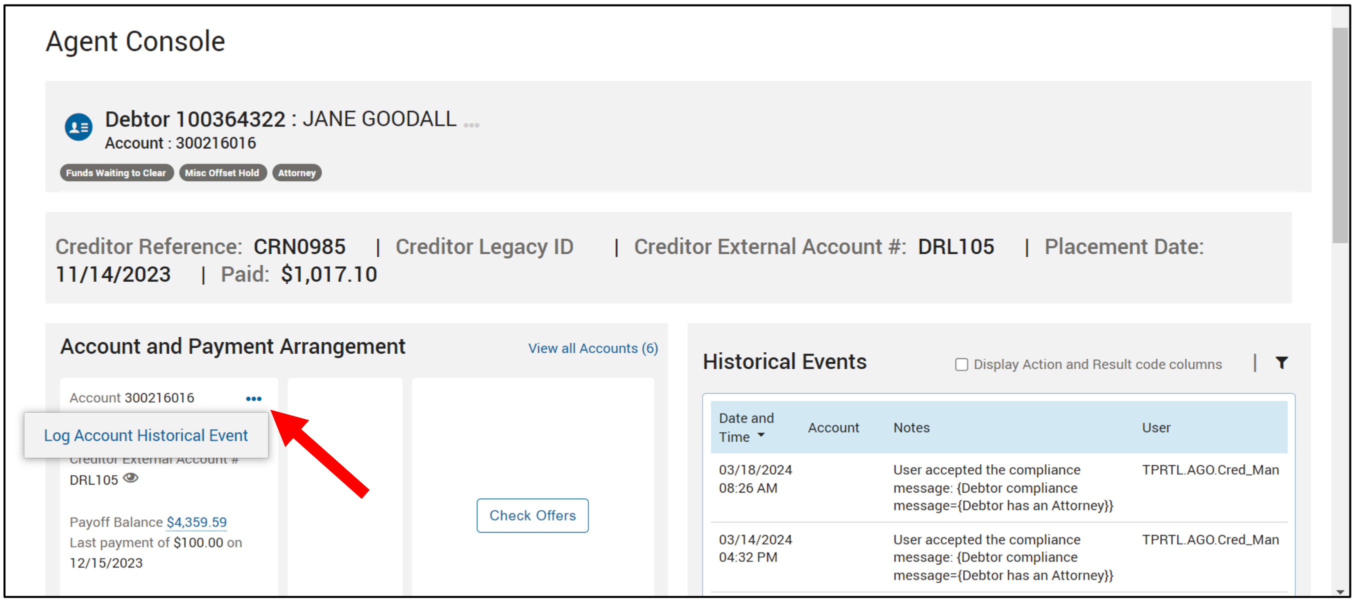
An interface with the BMV allows us to report accounts as paid in full in near real time, a process previously completed via email. To report an account as paid-in-full using good funds, fill out the **BMV Hold Release UDP** and add the **BMV Release tag** to the account.

1. From the BMV account, navigate to the UDP page. Click **Account**. Select **Add UDP**.

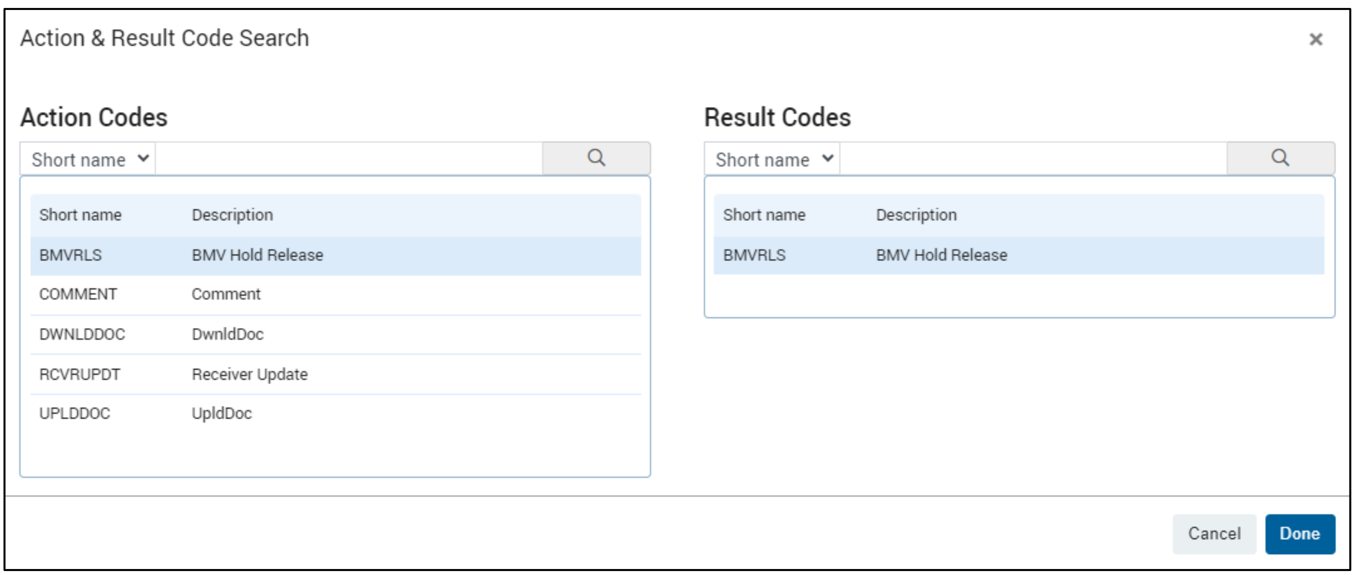


2. Select BMV Hold Release from the left panel to populate the UDP fields on the right. Complete both fields, click **Save**, then **Done**.

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



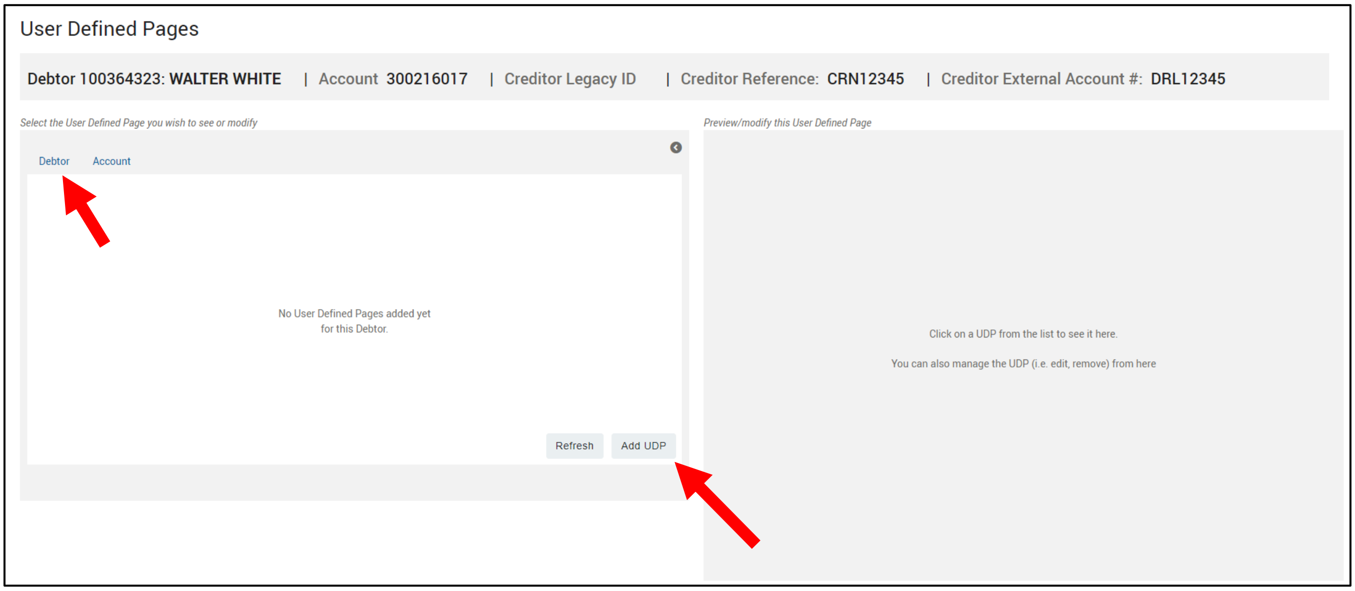
4. Select the AR pair **BMVRLS / BMVRLS** to add the account tag.



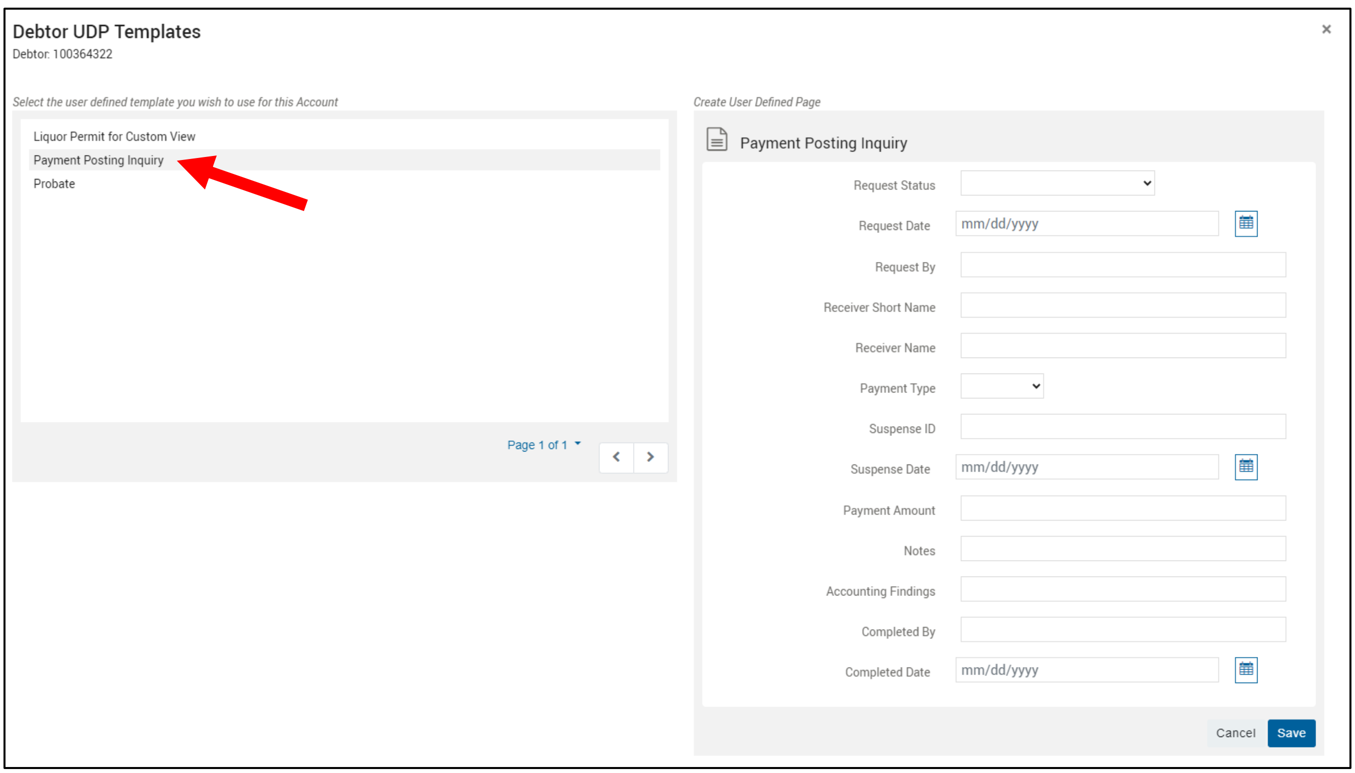
Payment Posting Inquiries

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**.



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.**

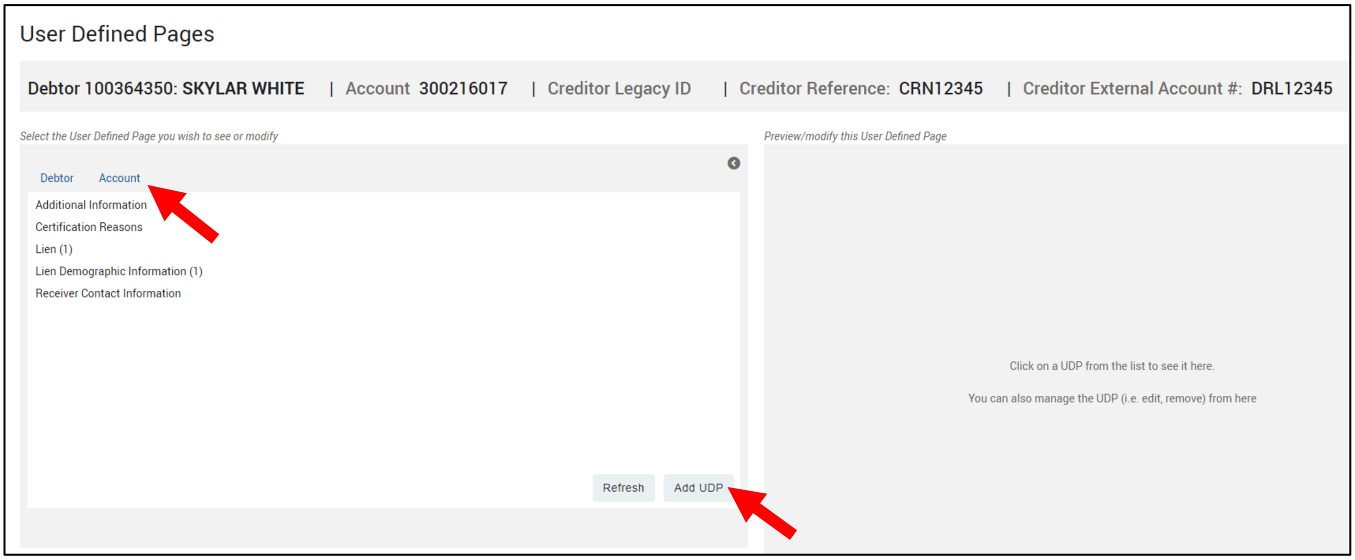


Note: See the [Financial Transactions] for where to find a Financial Transaction ID.

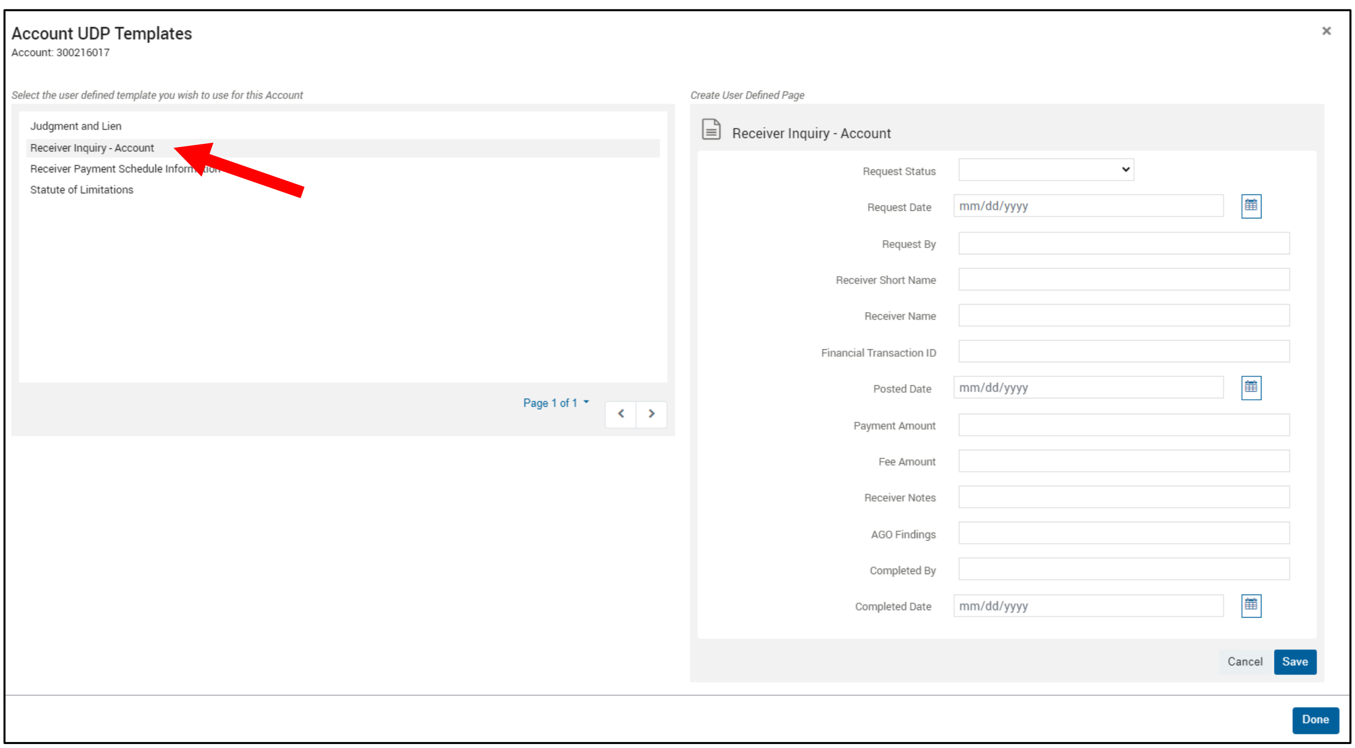
Receiver Inquiry UDP

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**.



2. Select **Receiver 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**.

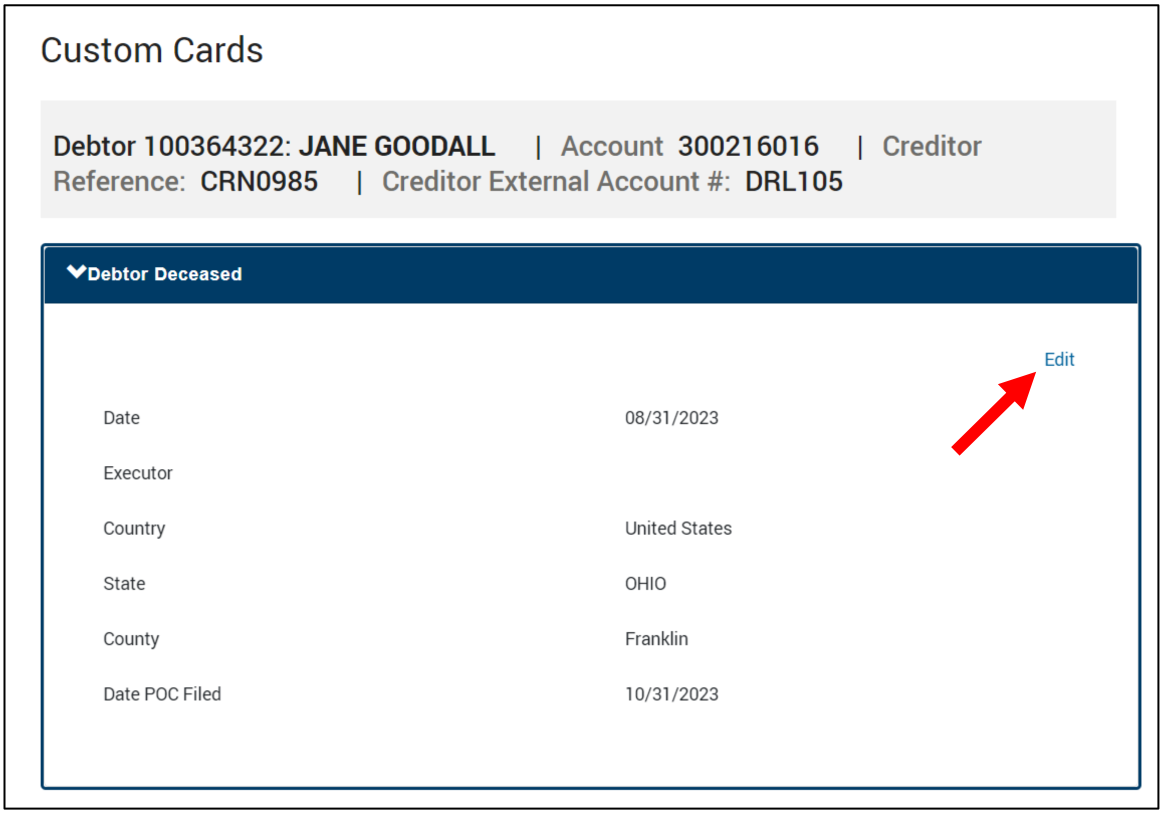


Note: See the Financial Transactions for where to find a Financial Transaction ID.

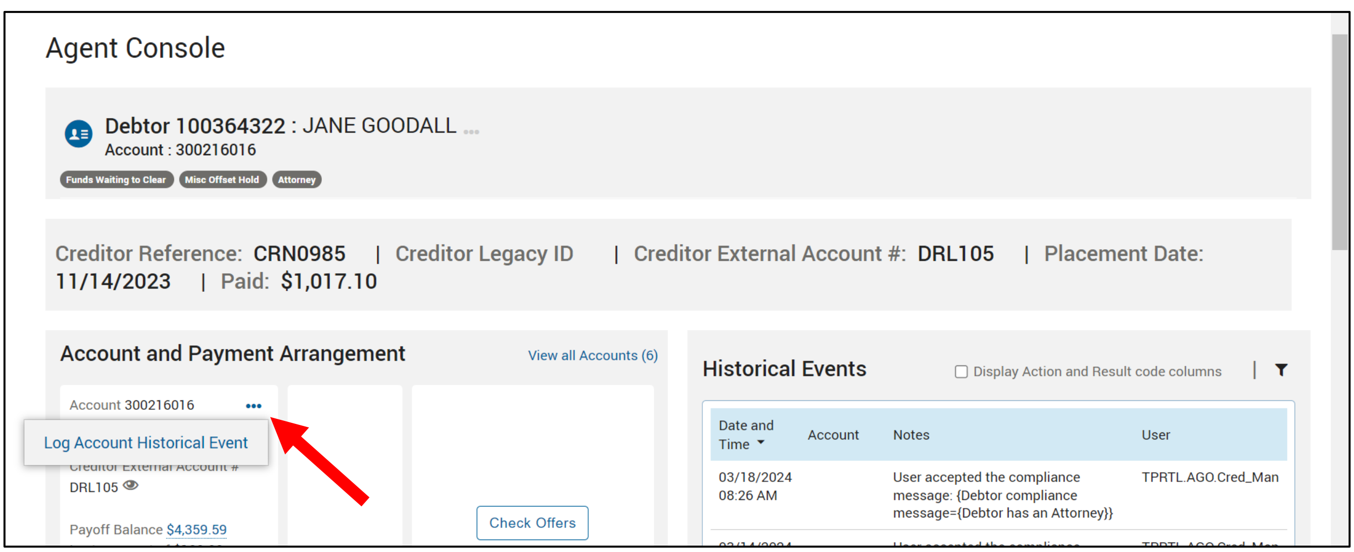
Custom Cards

Deceased Debtor Information

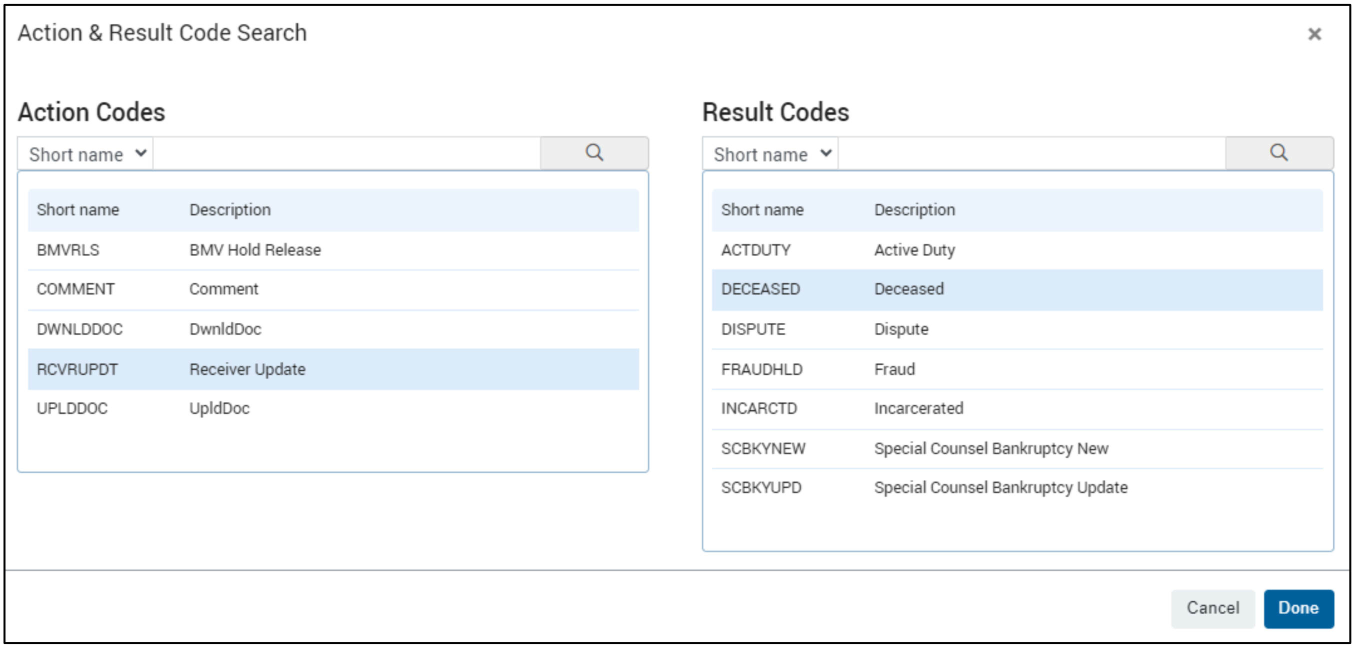
1. Select **Edit** to enter any known fields.



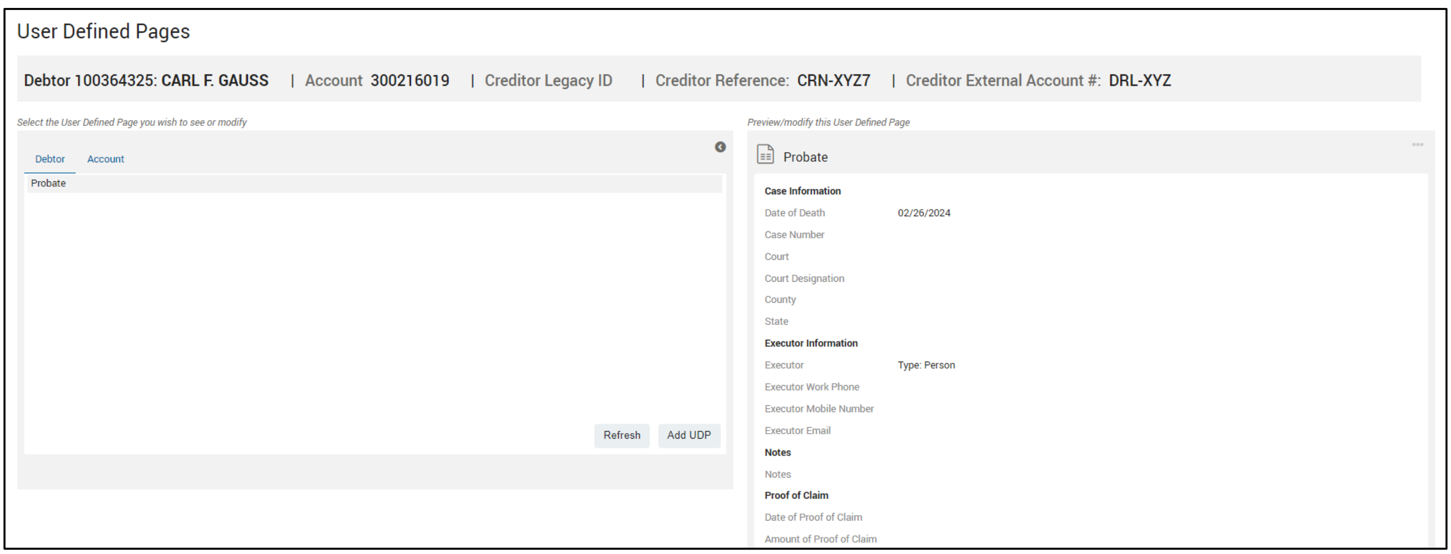
2. Navigate to the Agent Console page and use the account menu option to **Log Account Historical Event**.



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



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



Appendix

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
	Internal – Certification Notices
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
	Internal – General Collections
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
	BWC Lien Notice
LT210	BWC Due Process Notice
LT210CAN	BWC Due Process Notice - Canada ONLY
LT210REC	BWC Lien Notice
	Lien Filing
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
Lien Releases	
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
Liquor Permit	
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
Null & Void Liens	
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.