



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/bVozFBnlhgzg
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/jWJ9NQWLJOI
Financial Center Overview	https://youtu.be/3FYFxFKHQmP0
Debtor Profile Overview	https://youtu.be/41GjGIRGTN8
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

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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**.



Sign in with your email address

Email Address

Password

[Forgot your password?](#)

Sign in

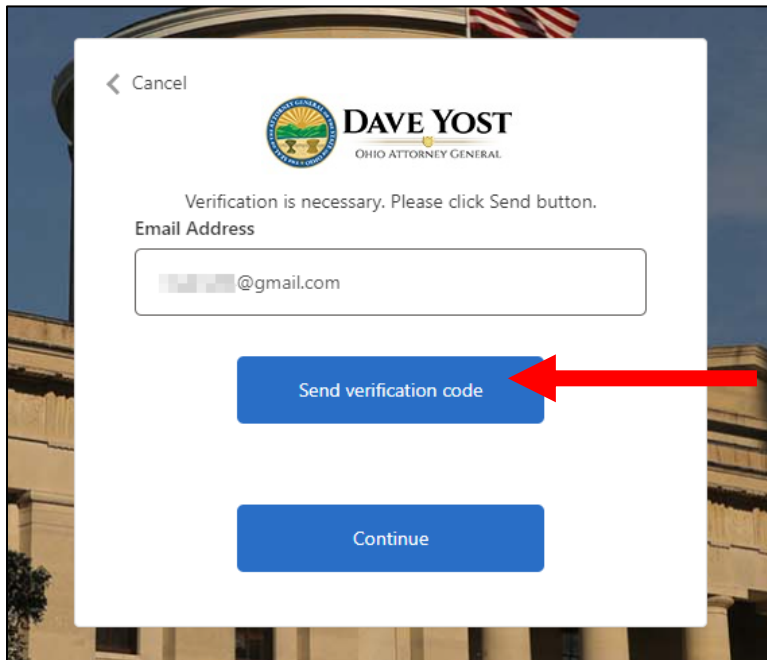
[Don't have an account? Sign up now](#)

Sign in with your OAG account

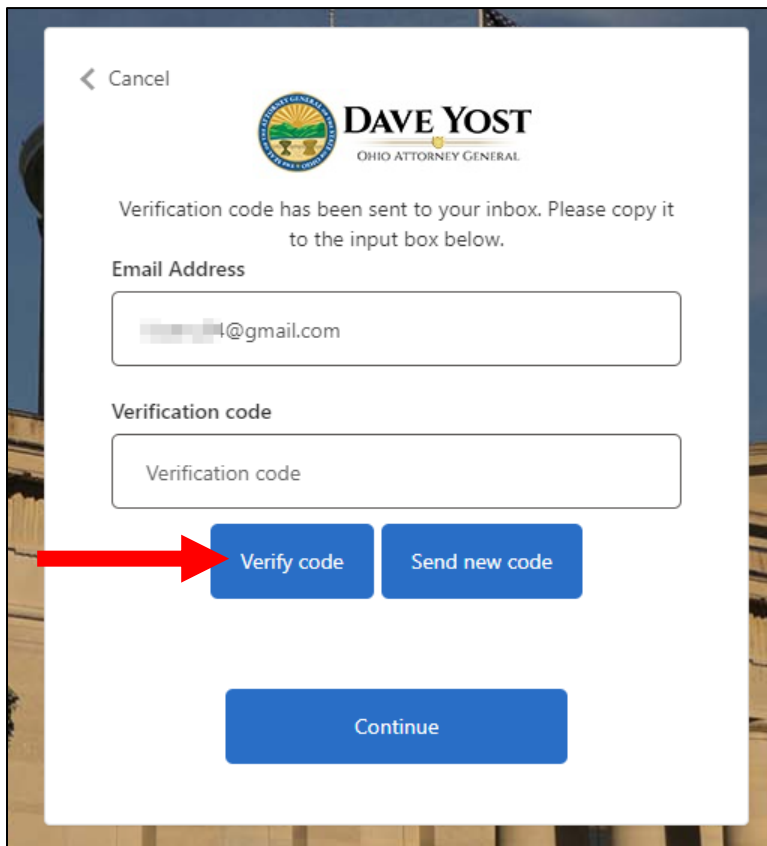
OAG Employee

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.

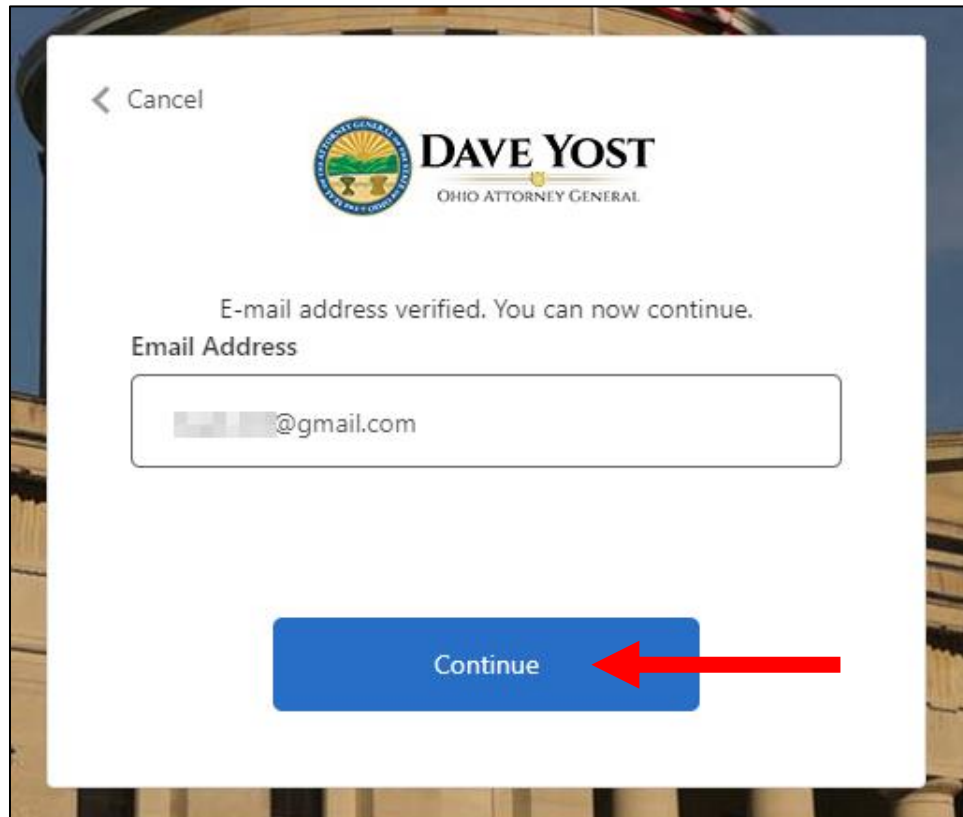
Click **Send verification code** and retrieve the code from your email.



Enter code and select **Verify code**.

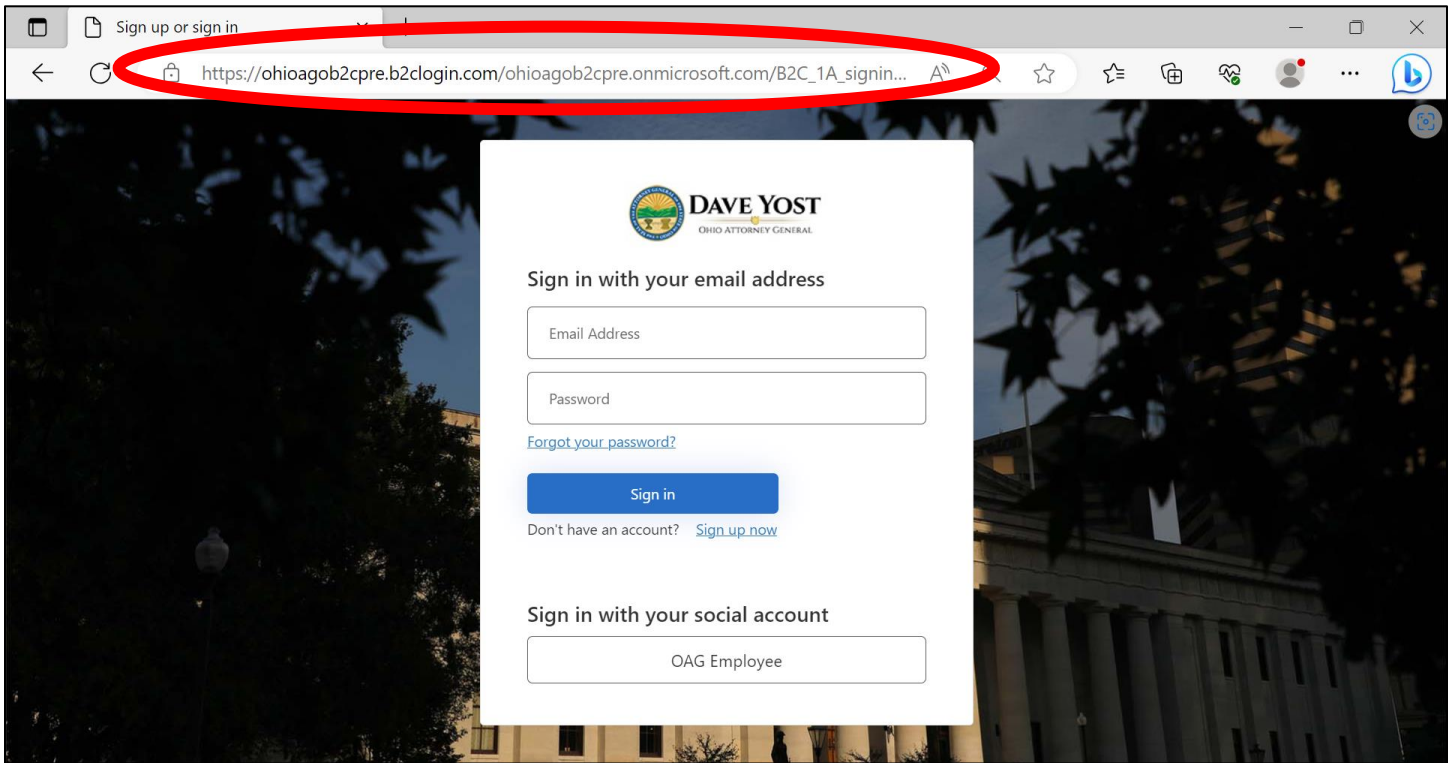



Click **Continue**.

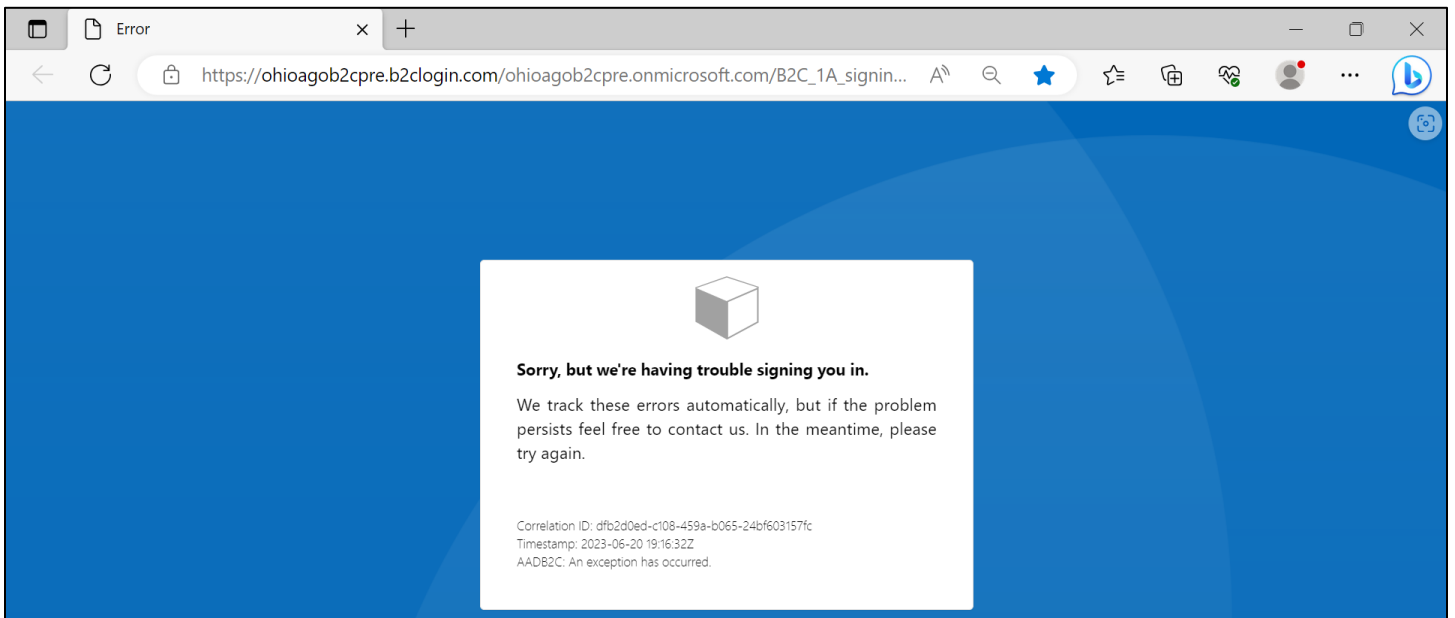


How to Favorite the Portal URL

The portal URL redirects to our authentication login.

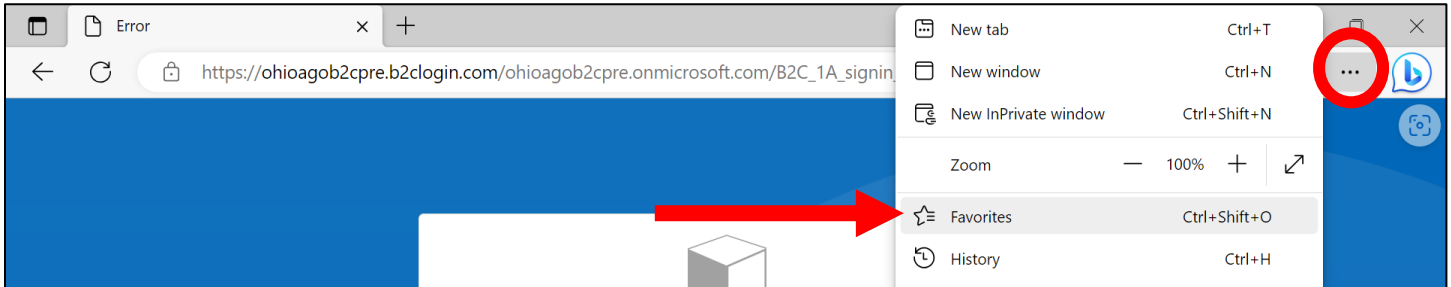


If you add this link to your favorites using the star icon , you may be redirected to an error page when accessing later on.

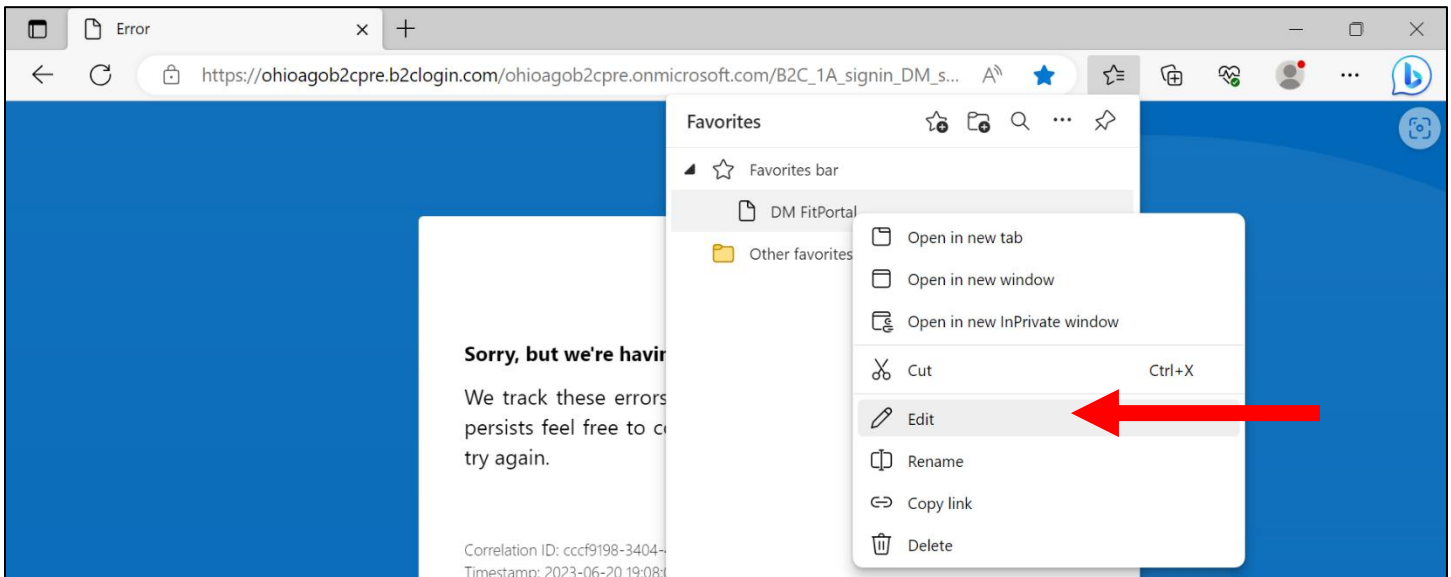


Follow the steps below to add the correct URL to your **Microsoft Edge** Favorites.

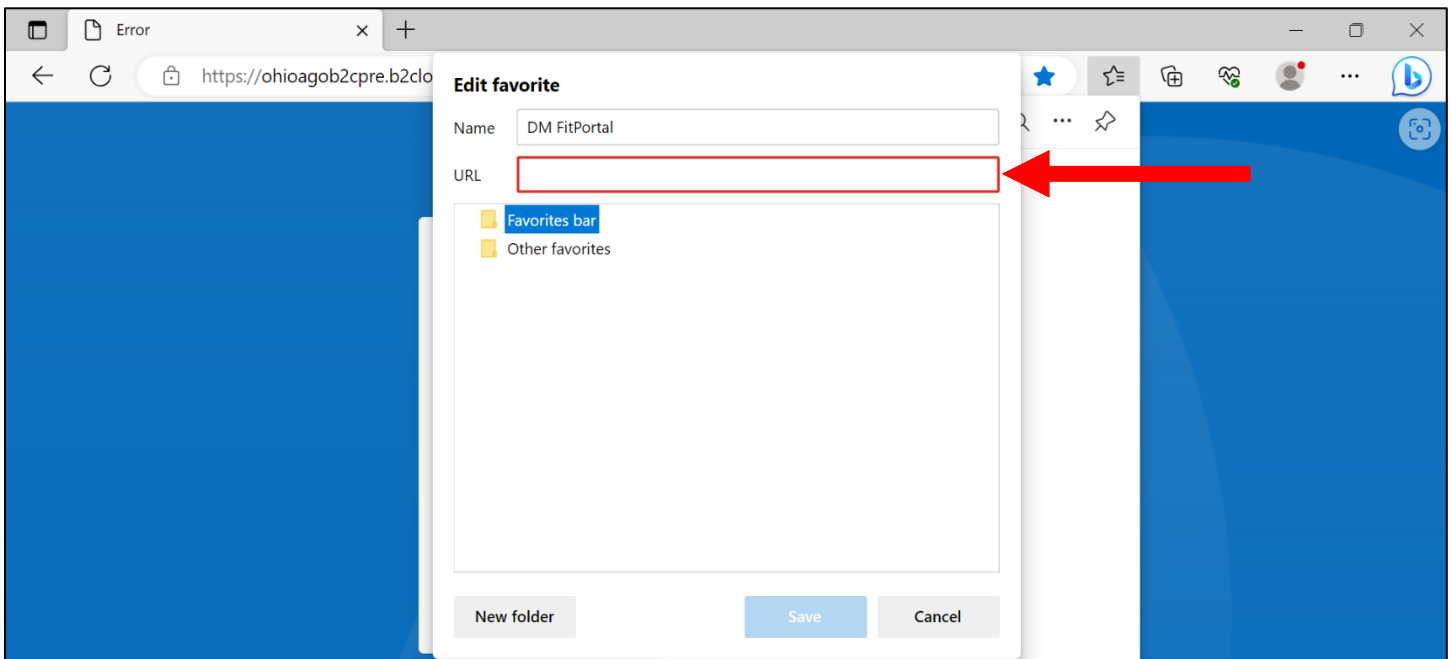
1. Use the ellipses **...** in the toolbar to open the browser menu. Select **Favorites**.



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

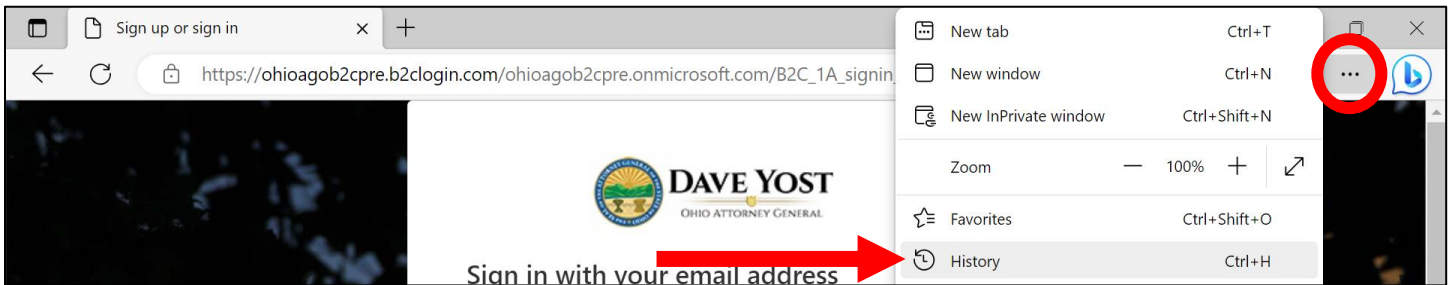


3. Delete the authentication login URL and paste the correct portal link in the field. Click **Save**.

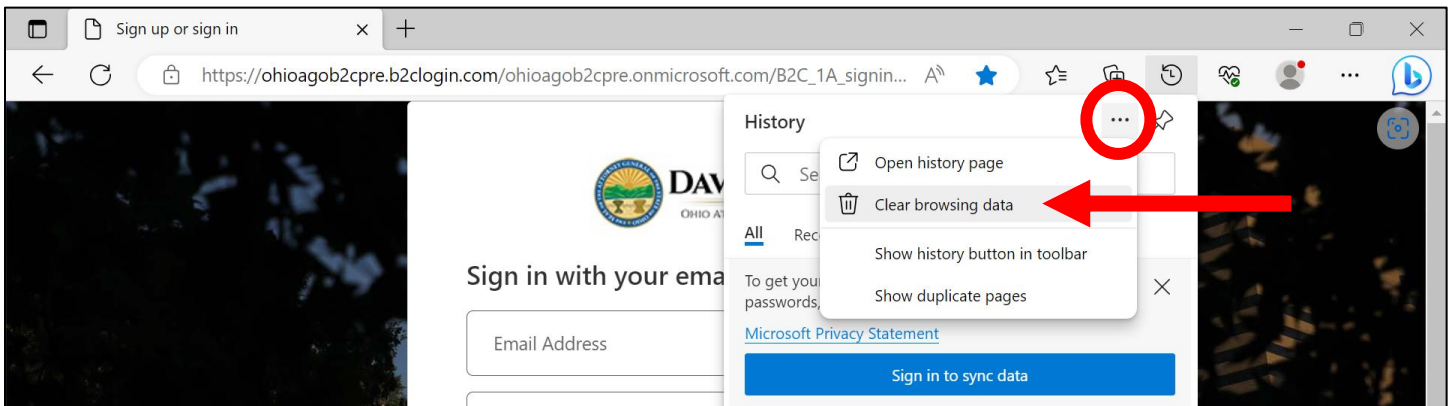


How to Clear History/Cache in Microsoft Edge

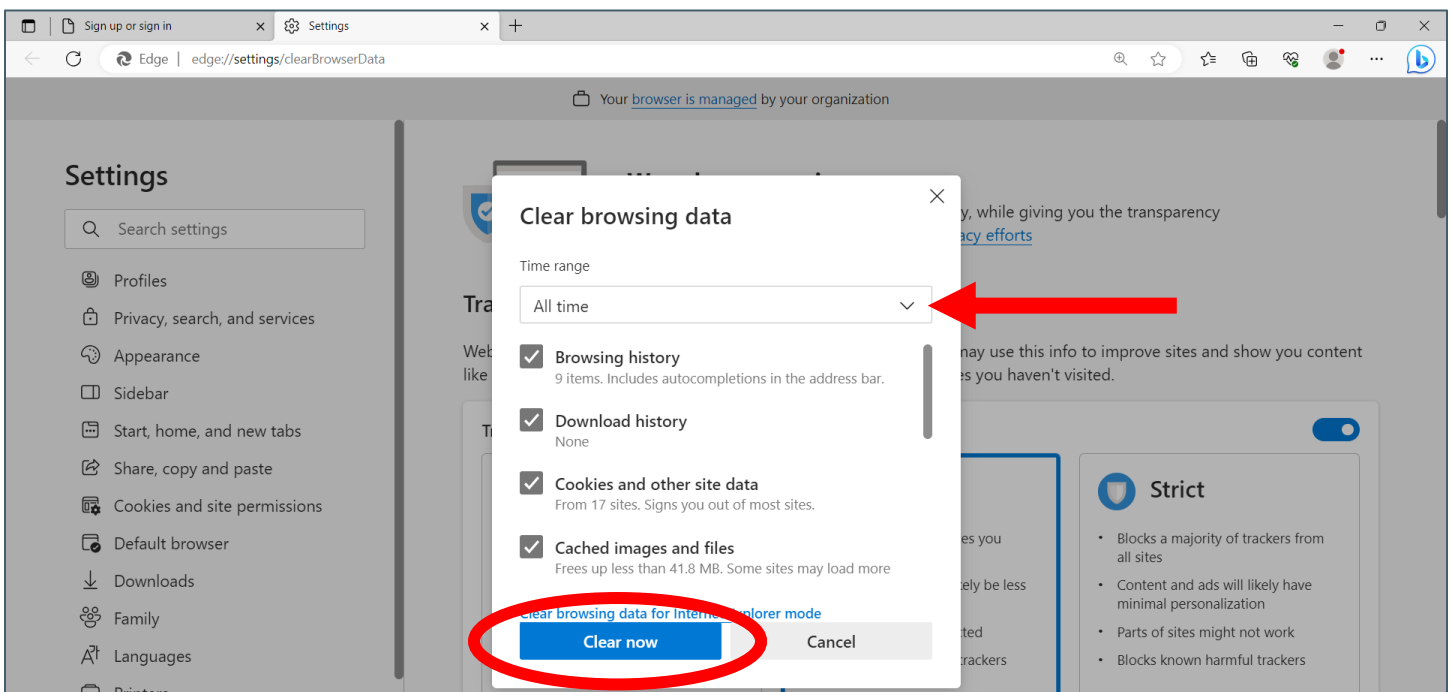
1. Use the ellipses **...** in the browser toolbar to open the browser menu. Select **History**.



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 a 'Generate Reports' section with a dropdown menu set to 'Creditor_Receiver_Inventory_Report'. Below this, there are date range selection fields for 'Account Placement Date' and 'Forward Date', each with 'mm/dd/yyyy' input and a calendar icon. A 'Generate Report' button is located at the bottom right. The footer contains the 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 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.

The screenshot shows the Debt Manager FitPortal interface. On the left, there is a Messages section with two messages: "Welcome to the new AGO FitPortal." and "The AGO Office will be closed on December 25 due to Christmas holiday." Below the messages is a View Reports section with a dropdown menu set to "ALL" and two buttons: "Reports" and "Financials". On the right, the Generate Reports section is active. It features a dropdown menu for "Creditor_Receiver_Inventory_Report". Below this, a red message states: "Please choose a date range within the allowable time frame (two years)." There are four date input fields: "Account Placement Date >=" (01/01/2024), "Account Placement Date <=" (02/27/2024), "Forward Date >=" (mm/dd/yyyy), and "Forward Placement Date <=" (mm/dd/yyyy). A "Generate Report" button is located at the bottom right of the section. A red box highlights the date input fields.

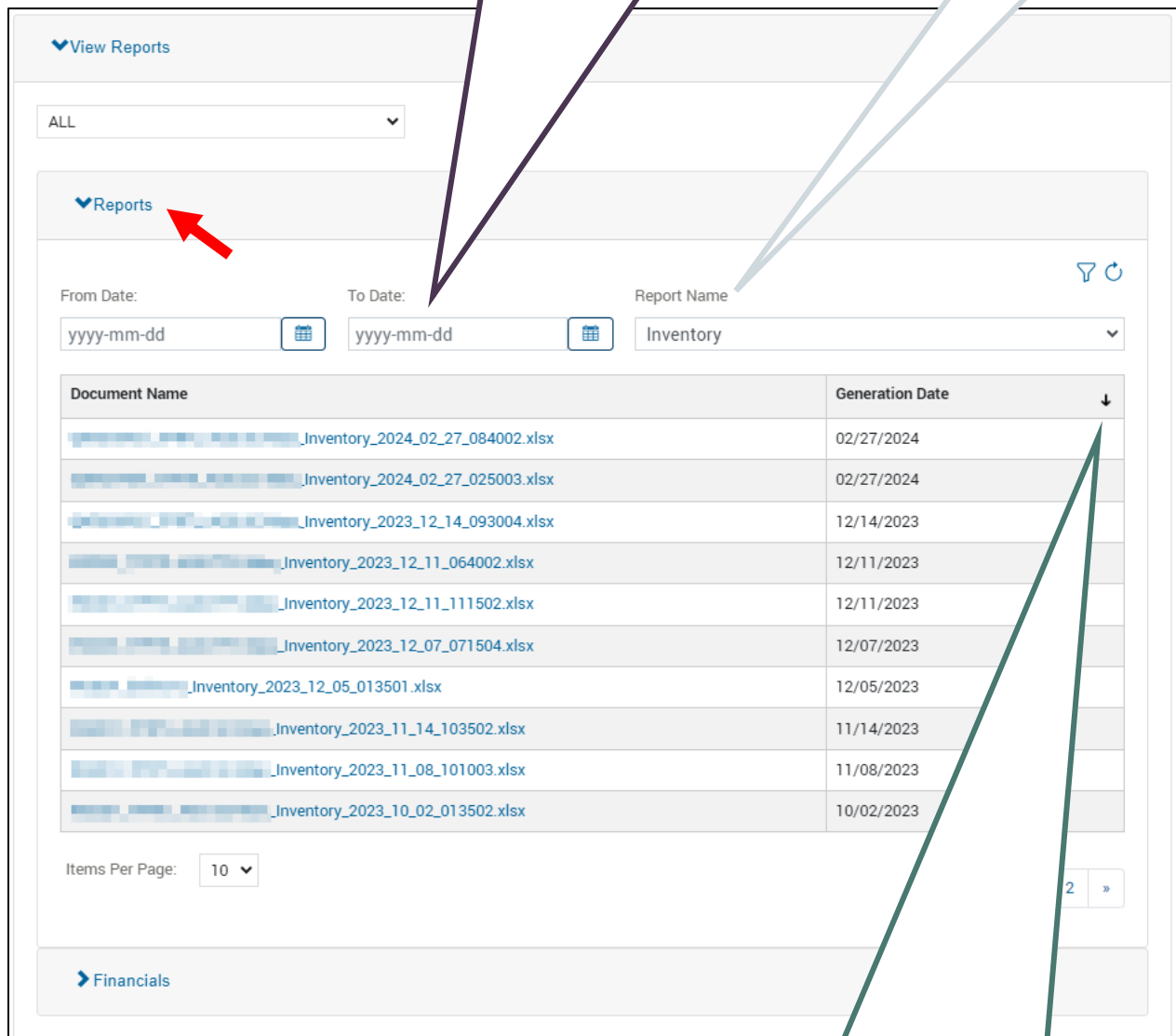
2. Click **Generate Report**. A notice will indicate the successful request of the report and direct you to retrieve it in the Reports panel.

The screenshot shows the Debt Manager FitPortal interface after a report request. The Generate Reports section is active. It features a dropdown menu for "Creditor_Receiver_Inventory_Report". Below this, a green notification box states: "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." Below the notification, a red message states: "Please choose a date range within the allowable time frame (two years)." There are four date input fields: "Account Placement Date >=" (mm/dd/yyyy), "Account Placement Date <=" (mm/dd/yyyy), "Forward Date >=" (mm/dd/yyyy), and "Forward Placement Date <=" (mm/dd/yyyy). A "Generate Report" button is located at the bottom right of the section. A red arrow points to the "Generate Report" button.

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.



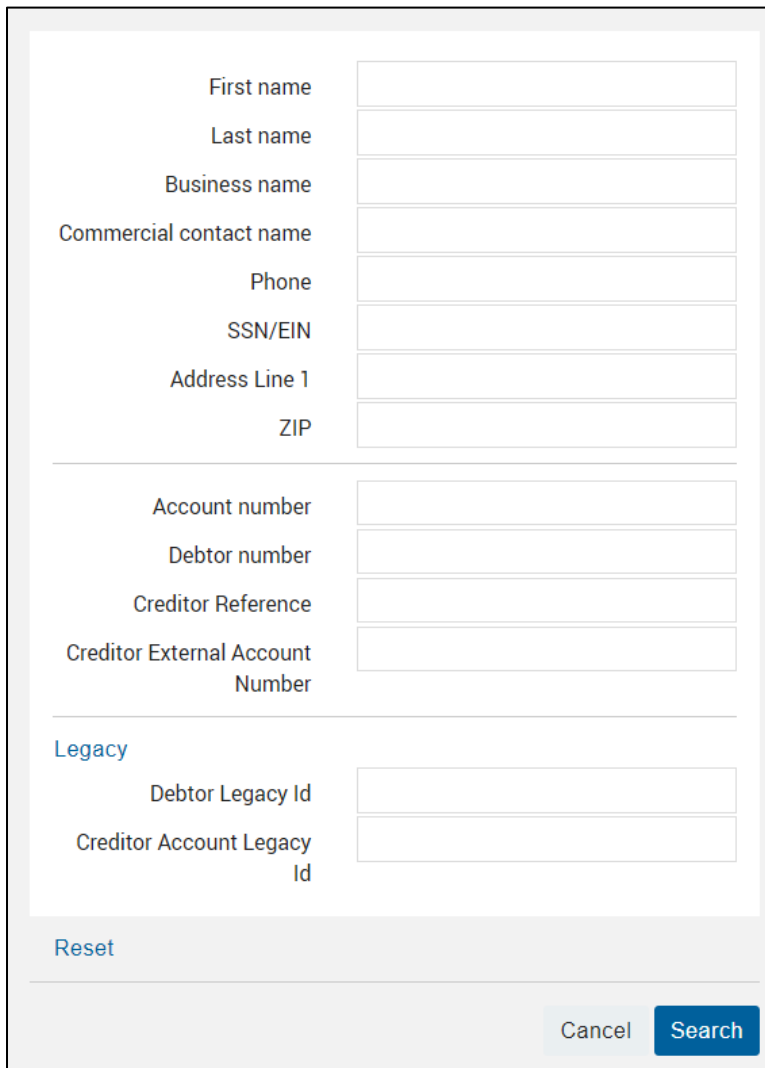
The screenshot shows the 'View Reports' section of a software interface. At the top, there is a 'View Reports' header with a dropdown menu set to 'ALL'. Below this is a 'Reports' section, indicated by a red arrow. The 'Reports' section contains filters for 'From Date' and 'To Date' (both with calendar 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 'Generation Date' column has a downward-pointing arrow icon, indicating it is sorted in descending order. The table lists several reports, with the most recent ones at the top. 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.



The search form contains the following fields and controls:

- 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 section:
 - 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.

 Error. 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
300216016	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
300216033	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
300216036	Primary	TRAINING CREDITOR	DRL101	\$9,924.41

Page 1 of 2

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.

The screenshot displays the Agent Console interface for a debtor. At the top, the debtor's name and account number are shown: "Debtor 100364322 : JANE GOODALL ... Account : 300216016". Below this, a banner contains creditor reference 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

[Confirm](#)

Add phone number

[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

Home
614-555-4444

Add phone number

Confirm Add

Close

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.

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

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.

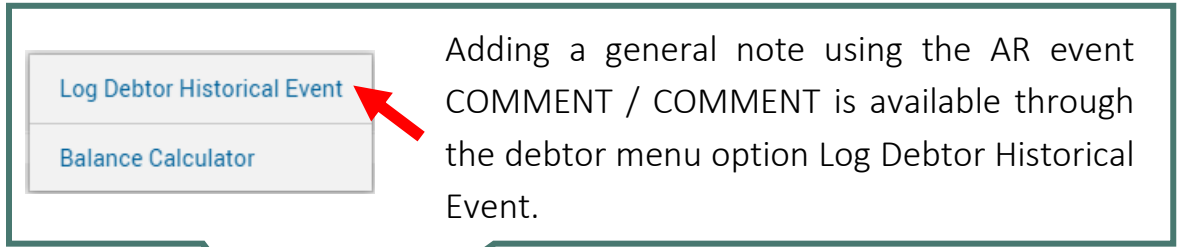
Date and Time	Account	Notes	User
12/20/2023 01:17 PM		Placing notice request. Template: LTPYSMAC, Document Template Short Name: LTPYSMAC, Regarding Debtor number: 100364322, Requester name: LTrujillo, Request Date: 12/20/23, Print Type: Internal, Recipient Id: 100364322, Recipient Type: CONSUMER, Delivery 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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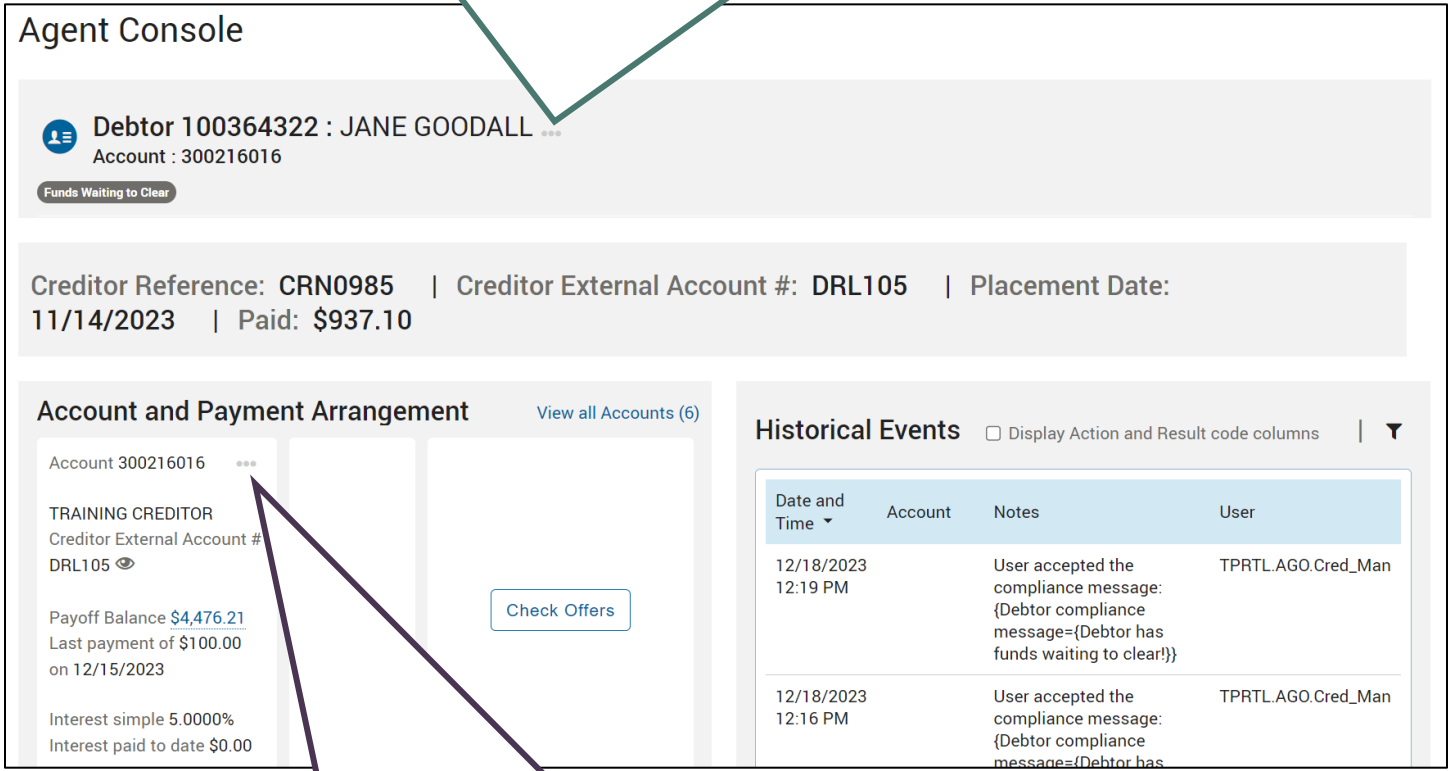
Ten rows of notes will display at a time. Use the filter to look for a specific date range or use the arrows to page through.

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

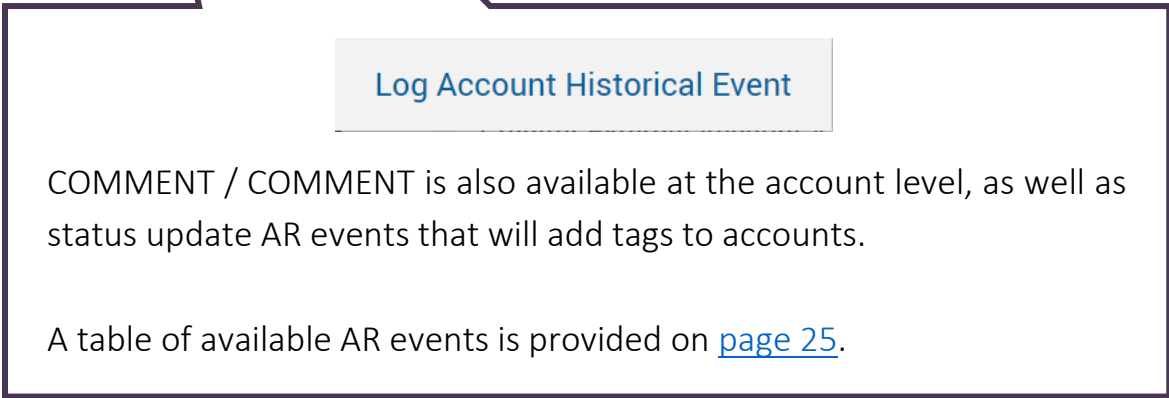
Payoff Balance [\\$4,476.21](#)
Last payment of \$100.00 on 12/15/2023

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).

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.

Account and Payment Arrangement

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

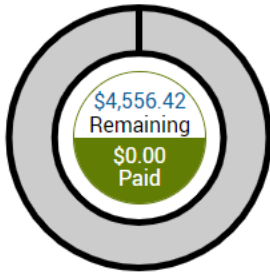
Forward

<p>Account 300216035 ...</p> <p>TRAINING CREDITOR Creditor External Account # DRL-XYZ 👁</p> <p>Payoff Balance \$1,110.75 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;"> ! 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 ...</p> <p>TRAINING CREDITOR Creditor External Account # DRL105 👁</p> <p>Payoff Balance \$4,395.99 Last payment of \$100.00 on 12/15/2023</p> <p>Interest simple 8.0000% Interest paid to date \$0.00</p>	<p>\$250.00 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

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

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

6 Accounts for **\$18,590.18**
Tags

Account	Payoff balance
Account 300216041 TRAINING CREDITOR Creditor External Account # DRL103 Payoff balance <u>\$0.00</u> <i>Not part of Debtor balance</i>	
Account 300216043 TRAINING CREDITOR Creditor External Account # DRL104 Payoff balance <u>\$400.40</u>	
Account 300216039 TRAINING CREDITOR Creditor External Account # DRL100 Payoff balance <u>\$2,825.00</u>	
Account 300216033 TRAINING CREDITOR Creditor External Account # DRL100 Payoff balance <u>\$2,825.00</u>	

Historical Events

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

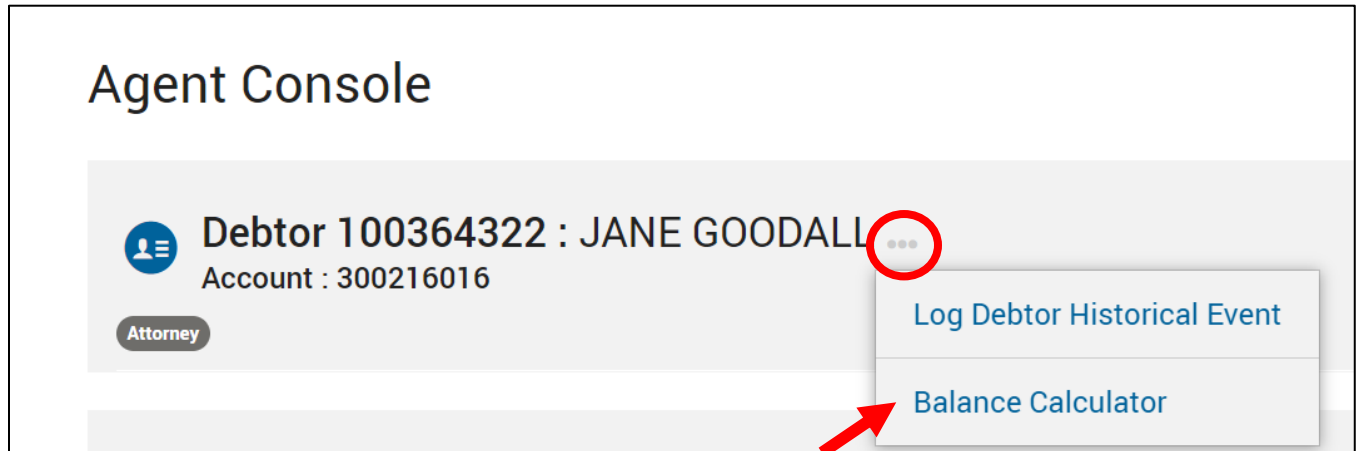
Navigate to another account by clicking the account number hyperlink.

Balance Calculation Tool

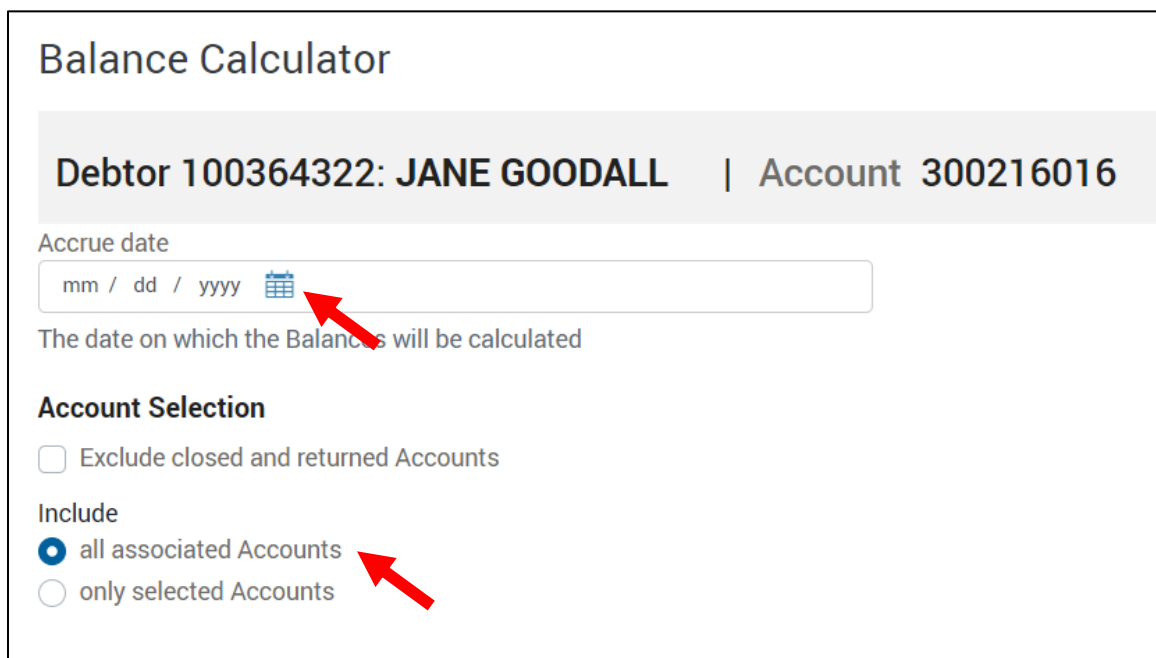


Project collection balance for account(s)

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 Number	Payoff Balance
Account 300216018	\$1,053.96
Account 300216024	\$1,178.80
Account 300216030	\$1,220.39
Account 300216042	\$2,634.92



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)

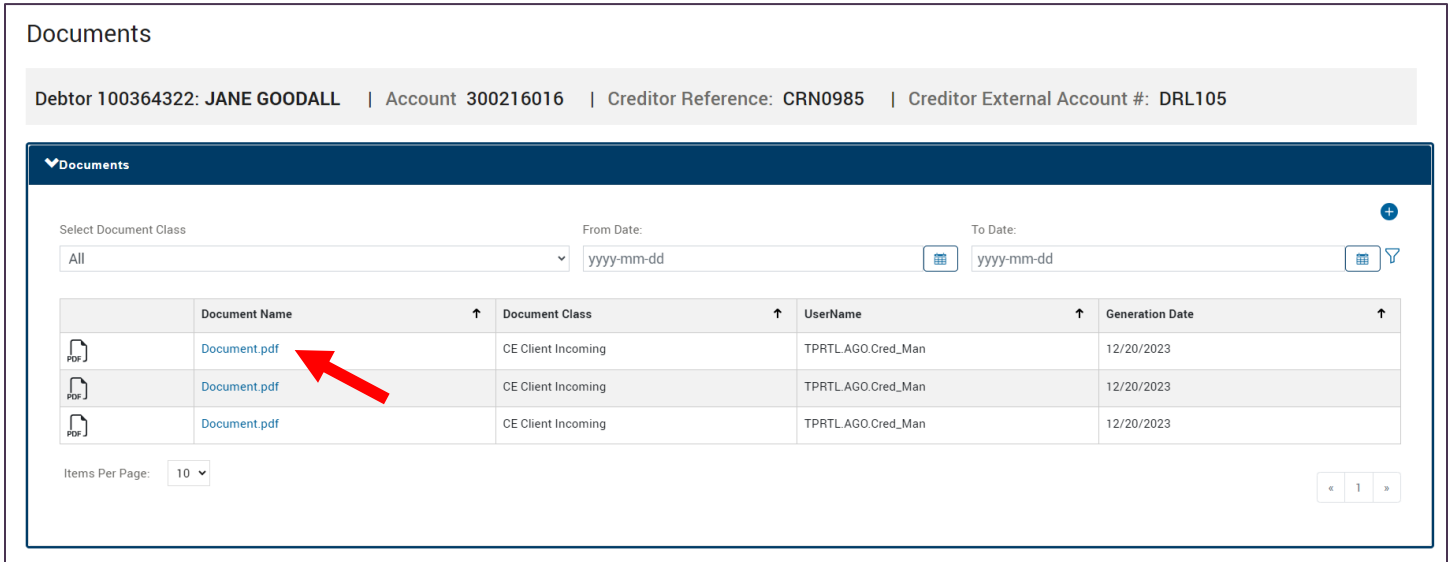
WENDY BIRD
Comaker

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

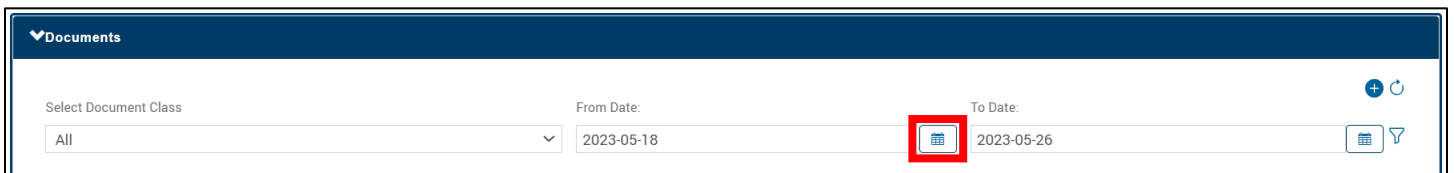
▼ Documents

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

	Document Name ↑	Document Class ↑	UserName ↑	Generation Date ↑
	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

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.

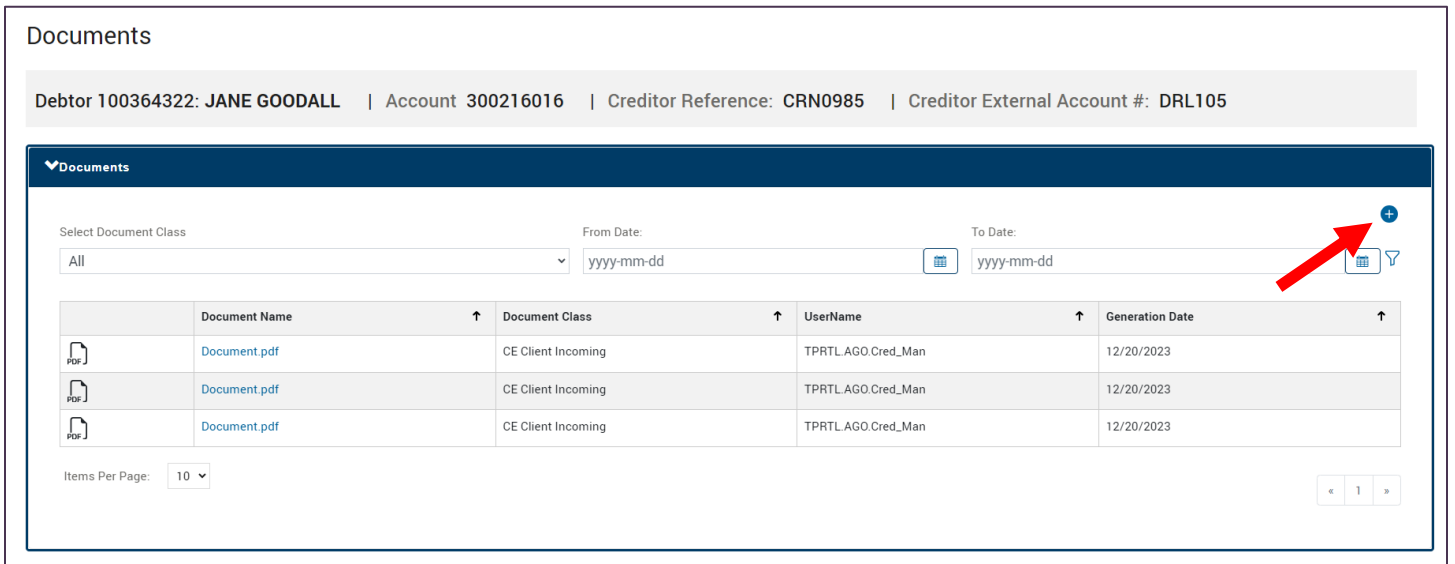


▼ Documents

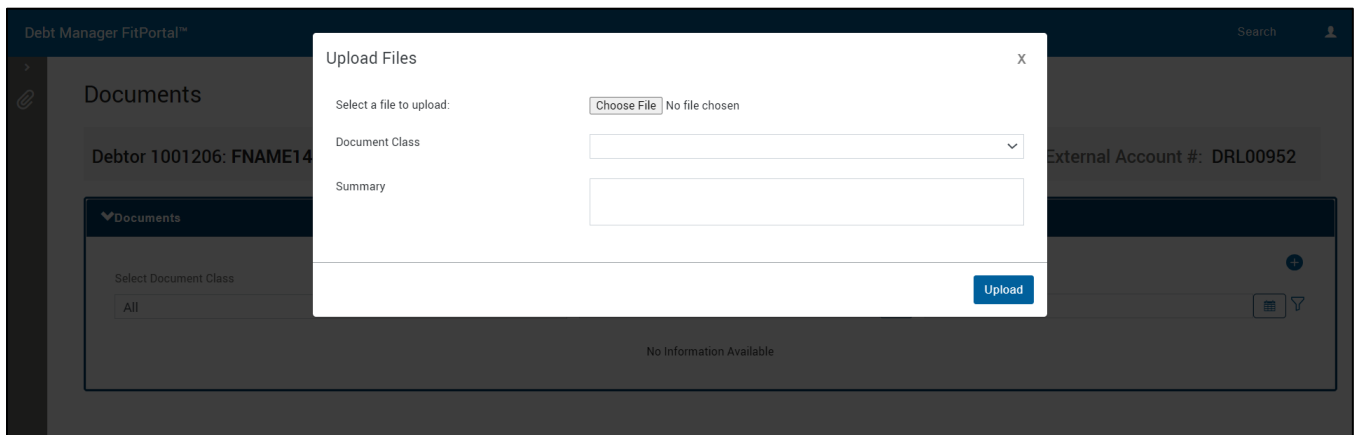
Select Document Class: All | From Date: 2023-05-18 | To Date: 2023-05-26

Uploading Documents

1. Select the plus icon  from the Documents page.



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.

The screenshot displays the 'Communication Center' interface. At the top, it shows account information: 'Debtor 100287100: DEBTOR-0721 | Account #: 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 'Dates' toggle switch and a 'TODAY' marker. 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 for 'Printed notice request. Template: LTTR22, User: system' dated '9/20 at 04:09 PM' and '7/26 at 04:03 PM', both '3 months ago' and '4 months ago' respectively. Each entry includes a 'Print Da (...)' link and 'Sent to Debtor' status. A 'View all Historical Events' link is located at the top right of the 'Written Communication' panel.

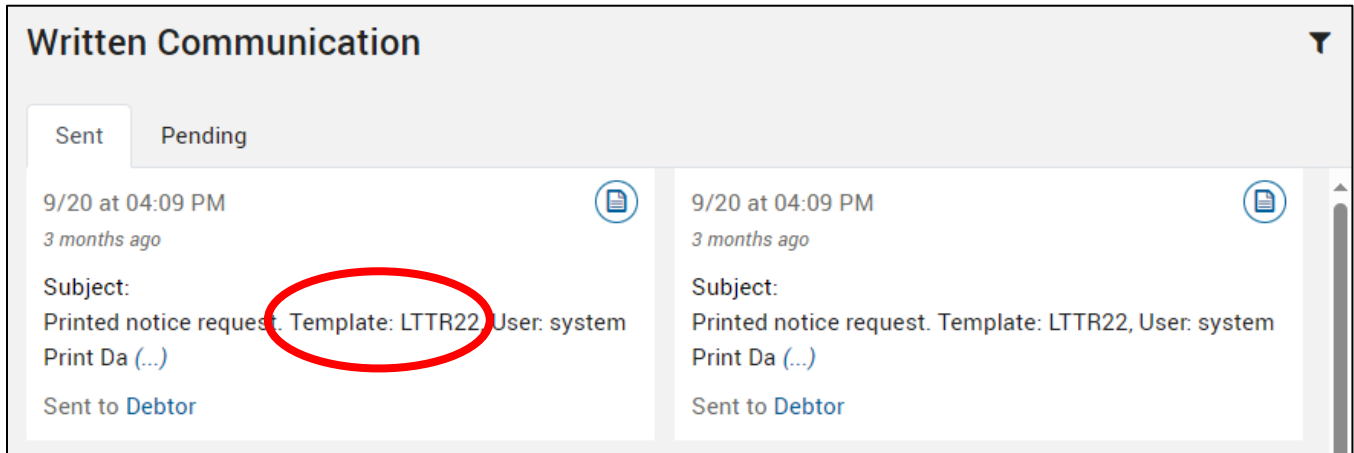
AR events that indicate verbal communication with the debtor will display here. Note: Not all AR events are configured to appear here.

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

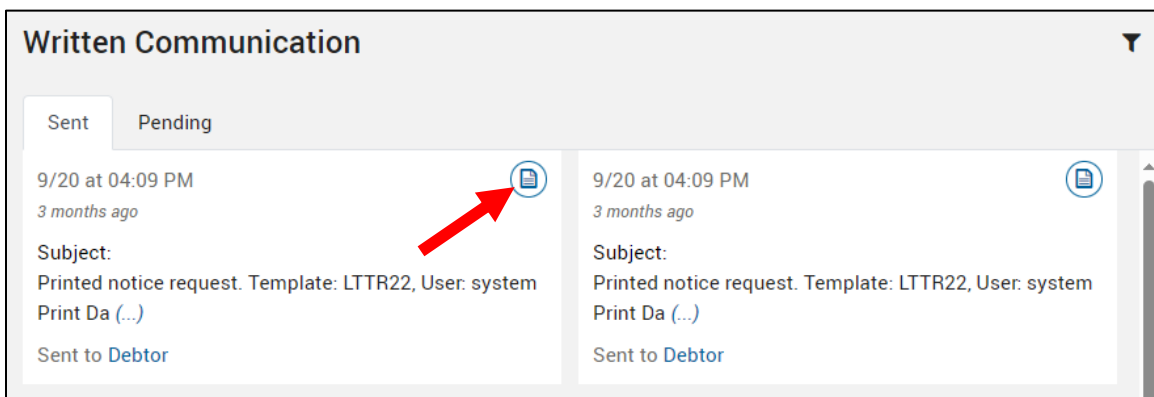
Use the **View all Historical Events** hyperlink as an alternate location to the Agent Console where notes can be read.

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.

The screenshot displays the Financial Center interface for a debtor. At the top, it shows the debtor's name (JANE GOODALL), account number (300216016), and creditor information (CRN0000000005, DRL105). The main content is divided into three primary sections:

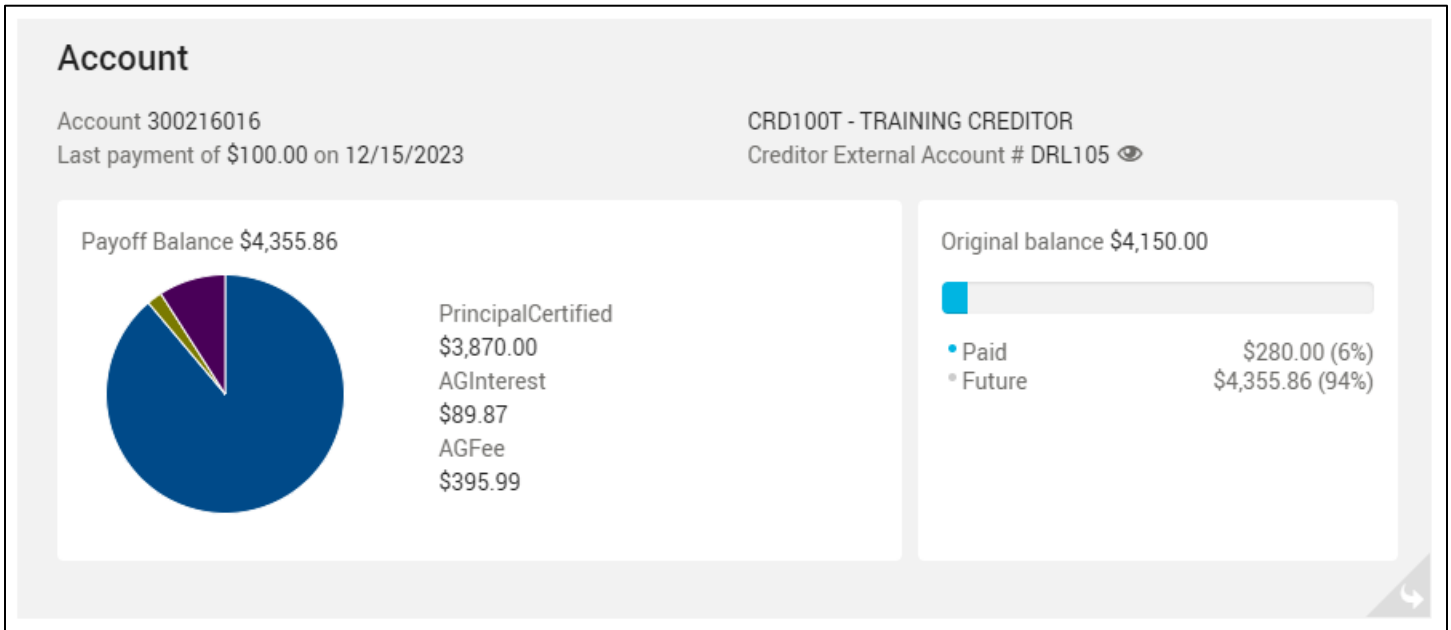
- Account Summary:** Shows the current payoff balance of \$4,355.86 and the original balance of \$4,150.00. A pie chart breaks down the payoff balance into Principal (\$3,870.00), Interest (\$89.87), and Fees (\$395.99). A progress bar indicates the balance breakdown: \$280.00 (6%) is paid, and \$4,355.86 (94%) is future.
- Financial Transactions:** A table listing 6 items found, including payments and reapplications with their respective dates, amounts, and statuses.
- Payment Arrangements:** A section for viewing active or historical payment plans, with a timeline from 24 months ago to now.


Callout boxes provide further details:

- Top Left:** View remaining account balance, broken down by buckets, and total account payment information.
- Top Right:** Transactions for the debtor across all their accounts.
- Bottom Left:** Historical payment plan or settlement offer information.
- Bottom Right:** Account charges (history of interest/fee accrual).

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	<u>\$4,150.00</u>
CurrentBalance	<u>\$4,344.66</u>
CreditBureauReportBalance	<u>\$4,344.66</u>
TotalPayment	<u>-\$280.00</u>
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
Bucket breakdown							\$90.91	\$9.09
Other Accounts							\$0.00	
Payment Schedule 16 instance523							\$100.00	
Displaying 1 - 1 of 1								
Page 1 of 1								
Payment Comment Person check								
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	
Show <input type="checkbox"/> Ext. Ref. Id <input type="checkbox"/> A Ref. Id								

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

Page: 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.

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

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

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

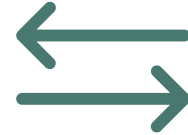
User-Defined Pages (UDP) are a multi-use feature of Debt Manager. They have been customized to meet various needs throughout the business process.



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.

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**.

The screenshot shows the 'User Defined Pages' interface. At the top, it displays account information: Debtor 100322593: DEBTOR2689 TESTCASE-0621 | Account 300204895 | Creditor Reference: CR-1019-2689 | Creditor External Account #: DRL-1019-2689. Below this, there are two main panels. The left panel, titled 'Select the User Defined Page you wish to see or modify', has a sub-panel 'Account' selected, indicated by a red arrow. The right panel, titled 'Preview/modify this User Defined Page', contains instructions: 'Click on a UDP from the list to see it here. You can also manage the UDP (i.e. edit, remove) from here'. At the bottom of the left panel, there are 'Refresh' and 'Add UDP' buttons, with a red arrow pointing to the 'Add UDP' button.

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

The screenshot shows the 'Account UDP Templates' interface for account 300204895. The left panel, titled 'Select the user defined template you wish to use for this Account', lists several templates: 'BMV Hold Release', 'Judgment and Lien', 'Lien Demographic Information', 'Receiver Inquiry - Account', 'Receiver Payment Schedule Information', and 'Statute of Limitations'. A red arrow points to 'BMV Hold Release'. The right panel, titled 'Create User Defined Page', shows the 'BMV Hold Release' form with two input fields: 'Confirmation Number' and 'Payment Amount' (with a value of 0.00). Below the fields are 'Cancel' and 'Save' buttons. At the bottom right of the entire interface is a 'Done' button.

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

The screenshot shows the 'Agent Console' for Debtor 100364322 (JANE GOODALL) with Account 300216016. It includes creditor reference CRN0985, creditor legacy ID, creditor external account # DRL105, and placement date 11/14/2023. The account status is 'Attorney'. A 'Log Account Historical Event' menu option is highlighted with a red arrow.

Account and Payment Arrangement

Account 300216016 [View all Accounts \(6\)](#)

Account 300216016 ⋮

- Log Account Historical Event

Creditor External Account # DRL105

Payoff Balance \$4,359.59
Last payment of \$100.00 on 12/15/2023

[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
03/14/2024 04:32 PM		User accepted the compliance message: {Debtor compliance message={Debtor has an Attorney}}	TPRTL.AGO.Cred_Man

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

The screenshot shows the 'Action & Result Code Search' dialog box. It has two sections: 'Action Codes' and 'Result Codes'. Both sections have a search bar and a list of codes. The 'Action Codes' list includes BMVRLS (BMV Hold Release), COMMENT (Comment), DWNLDDOC (DwnldDoc), RCVRUPDT (Receiver Update), and UPLDDOC (UpldDoc). The 'Result Codes' list includes BMVRLS (BMV Hold Release). The 'Done' button is highlighted in blue.

Action & Result Code Search

Action Codes

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

Result Codes

Short name	Description
BMVRLS	BMV Hold Release

[Cancel](#) [Done](#)

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

Request By

Receiver Short Name

Receiver Name

Payment Type

Suspense ID

Suspense Date

Payment Amount

Notes

Accounting Findings

Completed By

Completed Date

Cancel Save

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

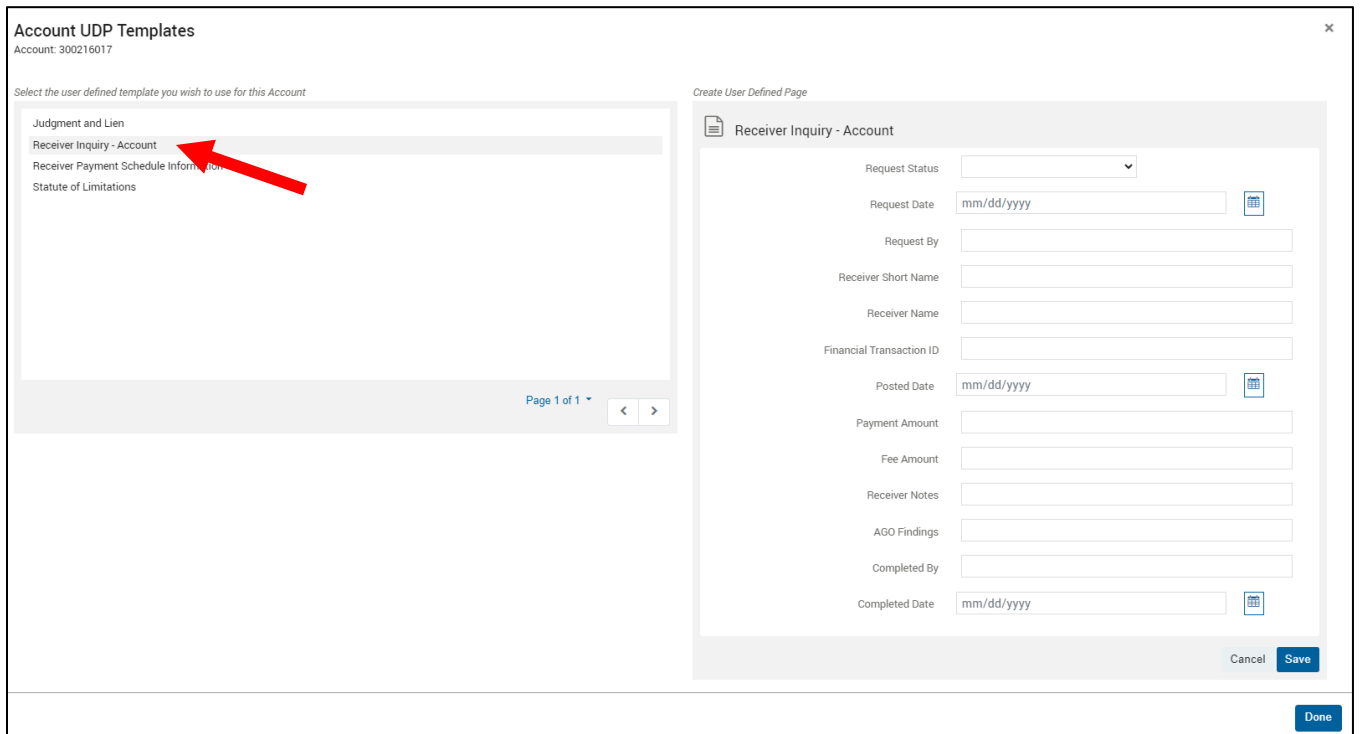
Receiver Inquiry UDP

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.

The screenshot shows the 'Custom Cards' interface. At the top, it displays 'Debtor 100364322: JANE GOODALL | Account 300216016 | Creditor Reference: CRN0985 | Creditor External Account #: DRL105'. Below this is a section titled '▼ Debtor Deceased' containing a table of information:

Date	08/31/2023
Executor	
Country	United States
State	OHIO
County	Franklin
Date POC Filed	10/31/2023

An 'Edit' link is located in the top right corner of the table, with a red arrow pointing to it.

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

The screenshot shows the 'Agent Console' interface. At the top, it displays 'Debtor 100364322 : JANE GOODALL ...' and 'Account : 300216016'. Below this are buttons for 'Funds Waiting to Clear', 'Misc Offset Hold', and 'Attorney'. The main section shows 'Creditor Reference: CRN0985 | Creditor Legacy ID | Creditor External Account #: DRL105 | Placement Date: 11/14/2023 | Paid: \$1,017.10'. The 'Account and Payment Arrangement' section shows 'Account 300216016' with a three-dot menu icon. A red arrow points to the 'Log Account Historical Event' option in the dropdown menu. The 'Historical Events' section shows a table with columns for 'Date and Time', 'Account', 'Notes', and 'User'.

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 RCVRUPDT / DECEASED.

Action & Result Code Search ✕

Action Codes

Short name 🔍

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

Result Codes

Short name 🔍

Short name	Description
ACTDUTY	Active Duty
DECEASED	Deceased
DISPUTE	Dispute
FRAUDHLD	Fraud
INCARCTD	Incarcerated
SCBKYNEW	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

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.