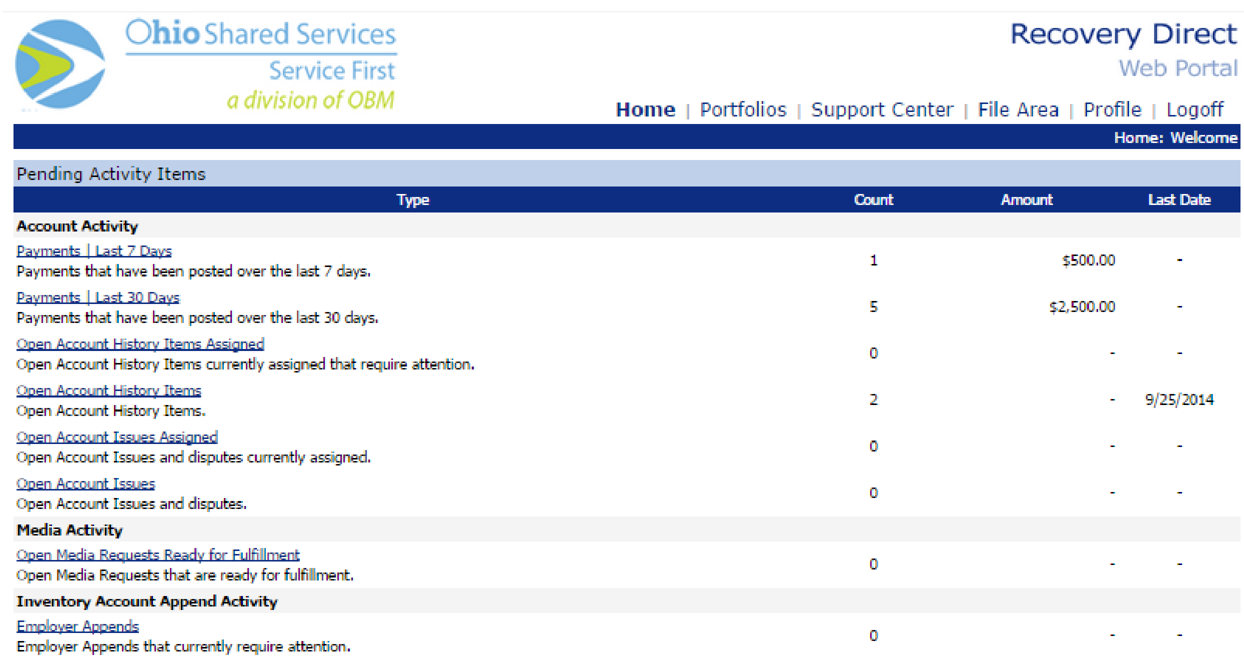
Process:	History Items
Description:	The Contact will utilize the OSS Web Portal to receive information from the Collection Vendors regarding a Case currently with OSS

Process Detail: This document outlines the steps for receipt of new History Items (Case Level Details) inside the OSS Web Portal Application and the steps to update the History Items on the Case

Steps

1. The Contact will need to navigate to the OSS Web Portal Login Site. The Contact will need to enter in the Account Logon information that they previously designated during the initial Sign Up for the OSS Web Portal.
2. The Contact should enter their User Name and Password into the Account Logon information

3. Once entered, the Contact should click on the Submit button at the bottom of the page
4. The page will update to display the Home Page associated with the contact.



5. When a Collection Vendor or OSS needs to make a note or has a question on an account, a history item will be created on the Case. When this occurs, if there is action needed by the

Contact, the History Item will be marked with the Responsible as the Contact and the History Item will be marked as open. When this occurs, the History Item will appear as an item on the home page as an Open Account History Item Assigned. The Contact should click on the Open Account History Item Assigned hyperlink to be brought into the Open Account History Item search

Home: Welcome

Pending Activity Items

Type	Count	Amount	Last Date
Account Activity			
Payments | Last 7 Days Payments that have been posted over the last 7 days.	4	$2,000.00	-
Payments | Last 30 Days Payments that have been posted over the last 30 days.	4	$2,000.00	-
Open Account History Items Assigned Open Account History Items currently assigned that require attention.	1	-	9/25/2014
Open Account History Items Open Account History Items.	1	-	9/25/2014
Open Account Issues Assigned Open Account Issues and disputes currently assigned.	1	-	9/24/2014
Open Account Issues Open Account Issues and disputes.	1	-	9/24/2014
Media Activity			
Open Media Requests Ready for Fulfillment Open Media Requests that are ready for fulfillment.	1	-	9/24/2014
Inventory Account Append Activity			
Employer Appends Employer Appends that currently require attention.	0	-	-

6. Once selected, the page will update to display the Inventory History Item Detail page. This page will display with all Open History Items currently Assigned to the Contact by the Collection Vendor/OSS that are currently open also. Assigned designates that the History Item currently requires action by the County, and if the Contact is associated with the County, they will have access to the Inventory History Item. The table below describes the fields that will be displayed for each case that has an Open Account History Item Assigned to the current Contact's County.

Inventory History Item Detail

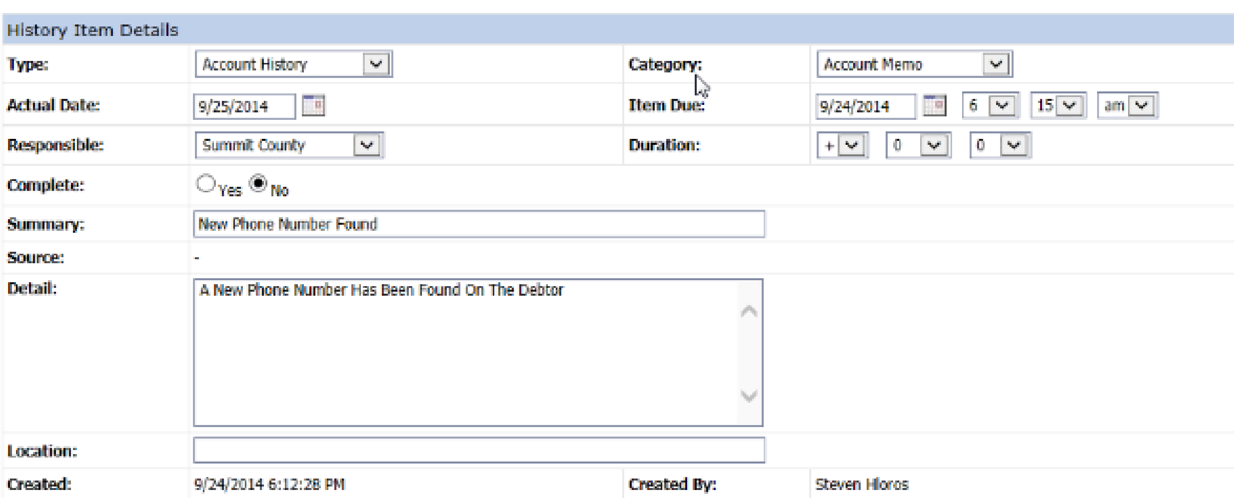
History ID	Data ID	Type	Category	Responsible	Created	Due	Status
1 total history items were found.							
3726324	665P000000242	Account History	Account Memo	System User	9/24/2014	9/24/2014	Open

Back

Field	Description
History ID	The Unique ID of the History Item
Data ID	The Internal OSS Account Number for the Case
Type	The Type of History Item. This will display as one of the following items - Account History – This designates a note on the history of the Case, such as questions on the Obligor or Case

	- Debtor Correspondence – This designates any information regarding the contact of the Obligor - Comment – This designates a general comment on the Case
Category	The Category of the History Item Type. This allows for further categorization of the Account History Item. This will display as one of the following - Account Issue – This designates that the history item is an Issue on the account, such as a Dispute - Account Memo – This designates that the History Item is a note on the Case - Blank – This designates a General Type
Responsible	This will display with the current responsible party for the Open History Item and whom should take the next step in investigation/follow up with regards to the history item
Created	This is the Created Date of the History Item
Due	This is the Due Date of the History Item
Status	This designates the current status of the History Item. This will display with Open for Open History Items

7. The Contact should click on the History ID of the History Item that they would like to view/update.
8. This will bring the Contact to the Open Account History Item Detail for the specific case. This will display with all of the details of the History Item. This is broken into the following sections. The first section is the History Item Details. The following table describes the fields contained in the History Item Details


History Item Details

Type:	Account History	Category:	Account Memo
Actual Date:	9/25/2014	Item Due:	9/24/2014 6 15 am
Responsible:	Summit County	Duration:	+ 0 0
Complete:	Yes No		
Summary:	New Phone Number Found		
Source:	-		
Detail:	A New Phone Number Has Been Found On The Debtor		
Location:			
Created:	9/24/2014 6:12:28 PM	Created By:	Steven Hloros

Field	Description
Type	This displays with the Type of History Item. This is a drop down, and may be updated if the History Item was marked incorrectly with the Type
Category	This displays with the Category of the History Item. This is a drop down, and may be updated if the History Item was marked incorrectly with the Category
Actual Date	This will display with the current date. This may be updated if the updates to the History Item occurred prior to the current date
Item Due	This will display with the Due Date of the History Item. This should be updated with an expected time that the History Item will be completed
Responsible	This will display with the Responsible Party for the next action on the Open Account History Item
Duration	This may be used to make the time it has taken to complete the History Item (This is not applicable to JFS and will not be used)
Complete	This is a radio button allowing for the designation of whether the History Item is completed or open. - If the History Item is currently open, this will display with No - If the History Item is currently closed, this will display with Yes The contact should update this to "Yes" when they have taken the necessary steps for completion of the History Item to close the History Item
Summary	This will display with a Summary of the History Item. This summary may be edited at any time
Source	This will display with the Source of Origin of the History Item
Detail	This will display with all details of the History Item. This may be updated/edited at any time
Location	This will display with a location for the history item (If applicable)
Created	This will display with the created date of the history item. This is not updatable by the contact
Created By	This will display with the User or Contact/Company that created the History Item

9. The second section is the Add New Comment History section. This allows for the addition of new comments on the History Item, along with the upload of a document (Such as a Word or PDF document). The add button will attach any information that is entered into the Comments field, or will upload any document that is attached using the Browse button on the Attachment field.

Add New Comment History

Comments	Attachment	
	Browse	Add

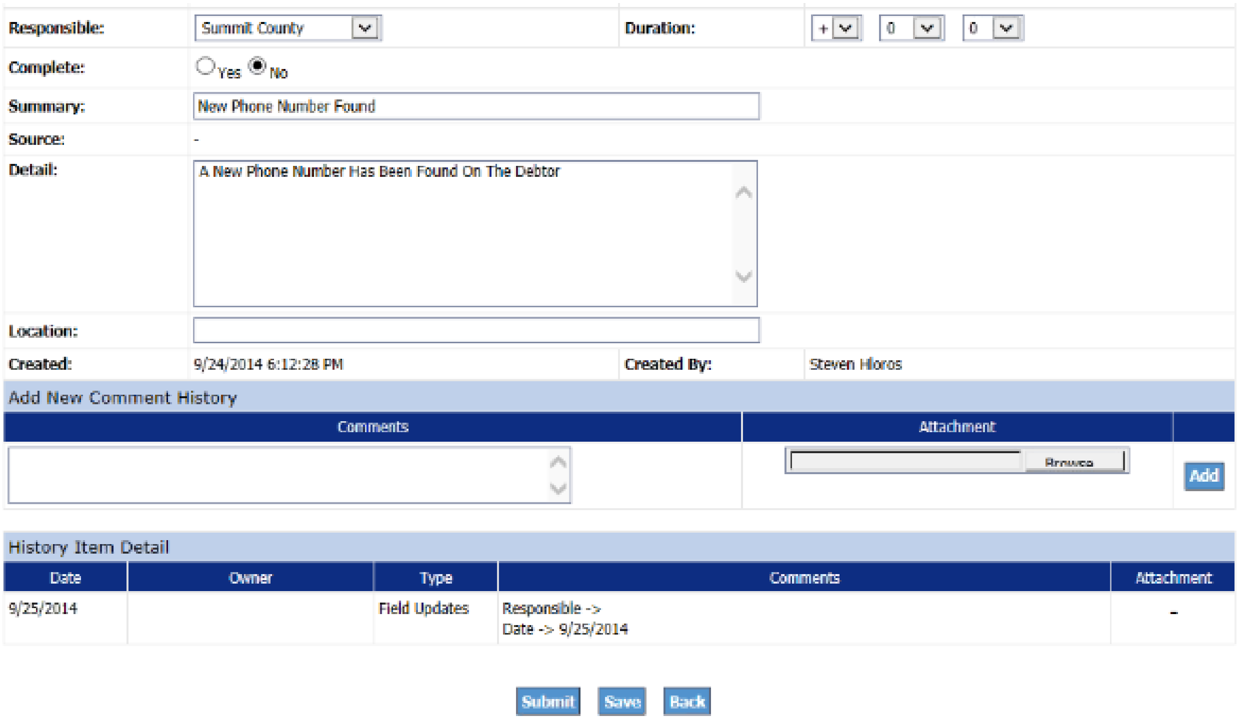
10. The last section is the History Item Detail. This section will show with all modifications to the History Item Detail, including any updates to the Dates and Responsible, so that updates may be tracked historically. This will automatically update and is not editable by the contact.

History Item Detail

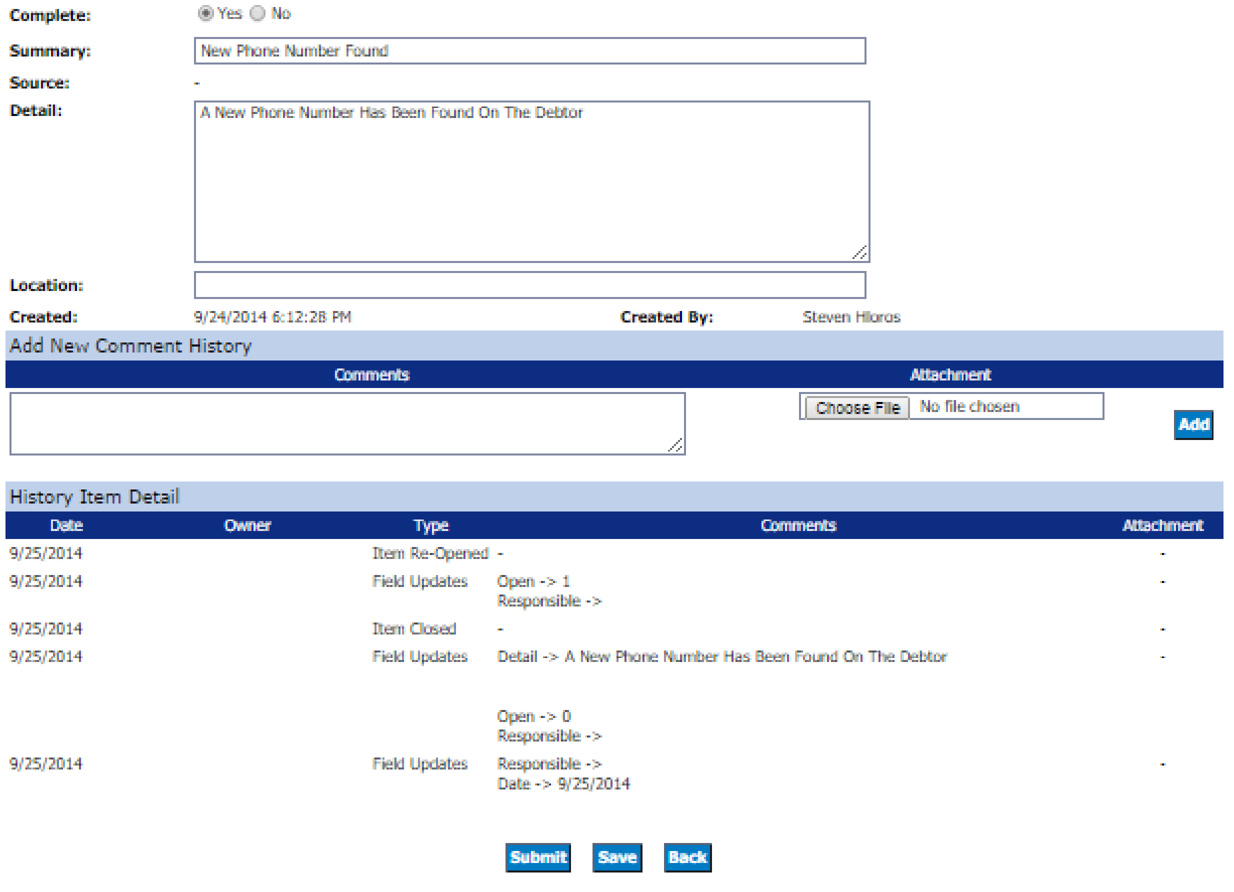
Date	Owner	Type	Comments	Attachment
9/25/2014		Field Updates	Responsible -> Date -> 9/25/2014	-

Submit Save Back

11. In the case that the History Item was a question from the Collection Vendor or OSS, the Contact should make updates to the History Item details, designating the response for the question in the Detail or with New Comment History items and update the Responsible to either OSS or the Collection Vendor by using the drop down. Once this is done, the Contact should click on the Submit button at the bottom of the page. This will notify the new Responsible Party that an update has occurred on the History Item and that they now should view the updates to the History Item.



12. If the History Items final action is to be done by the Contact, the Contact should update all of the information/action that has been done on the Case for the history item using the Detail/Comment History, and click the Save button at the bottom of the page. Once Saved, the Contact should click on the “Yes” radio button for the Complete field to update the History Item to a Complete Status, and click on the Save Button. This will update the history item to a completed status and will no longer appear on the Home Page as a History Item requiring action.



Complete: (•) Yes ( ) No

Summary: New Phone Number Found

Source: -

Detail: A New Phone Number Has Been Found On The Debtor

Location:

Created: 9/24/2014 6:12:28 PM **Created By:** Steven Hloros

Add New Comment History

Comments	Attachment
	Choose File No file chosen Add

History Item Detail

Date	Owner	Type	Comments	Attachment
9/25/2014		Item Re-Opened	-	-
9/25/2014		Field Updates	Open -> 1 Responsible ->	-
9/25/2014		Item Closed	-	-
9/25/2014		Field Updates	Detail -> A New Phone Number Has Been Found On The Debtor Open -> 0 Responsible ->	-
9/25/2014		Field Updates	Responsible -> Date -> 9/25/2014	-

Submit Save Back

13. This completes the actions needed for the Open History Items