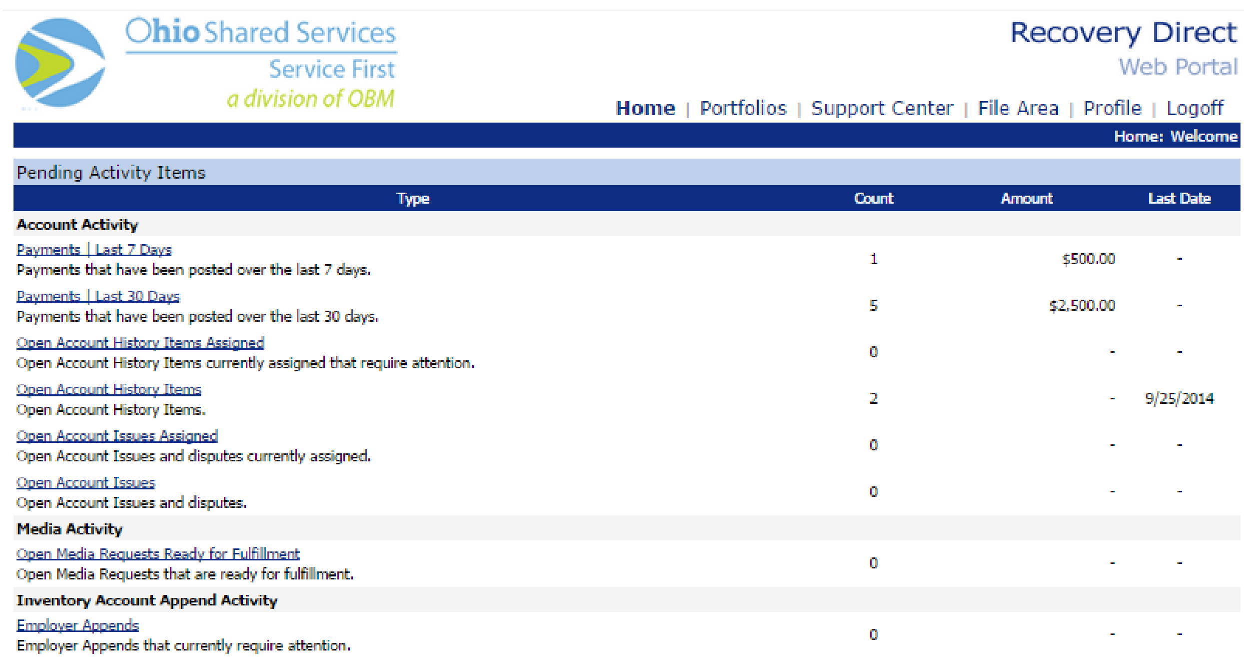
Process:	Account Lookup
Description:	The Contact has the ability to lookup Cases that are currently with OSS through the OSS Web Portal

Process Detail: This document details the process for Account/Case Lookup in the OSS Web Portal

Steps

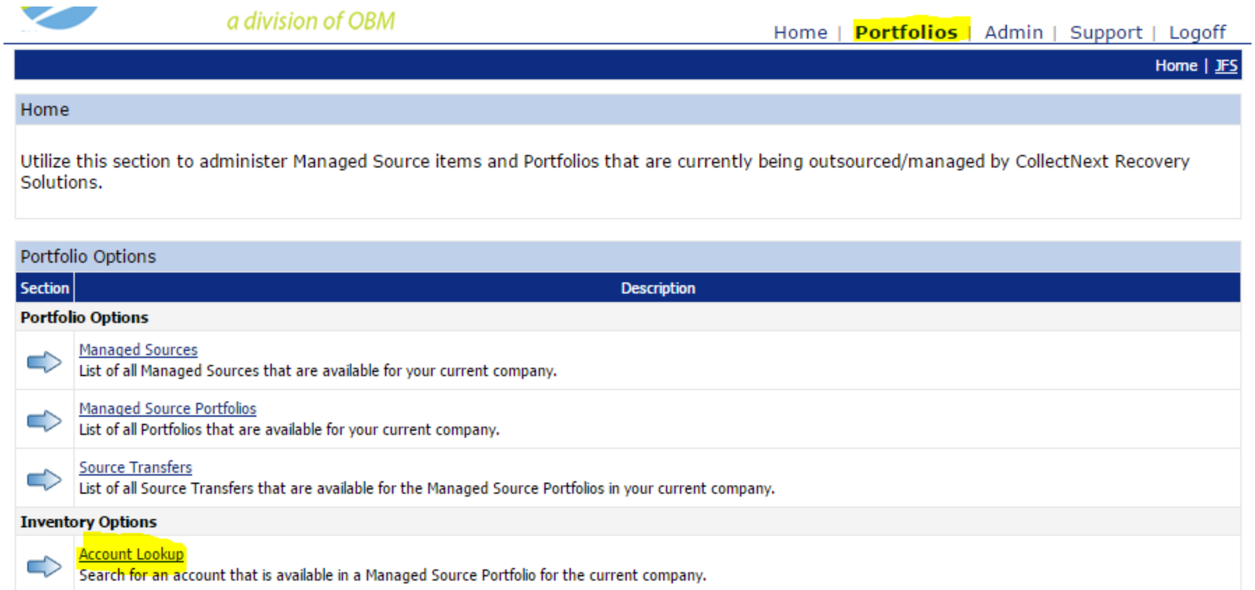
1. The Contact will need to navigate to the OSS Web Portal Login Site. The Contact will need to enter in the Account Logon information that they previously designated during the initial Sign Up for the OSS Web Portal.
2. The Contact should enter their User Name and Password into the Account Logon information

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.

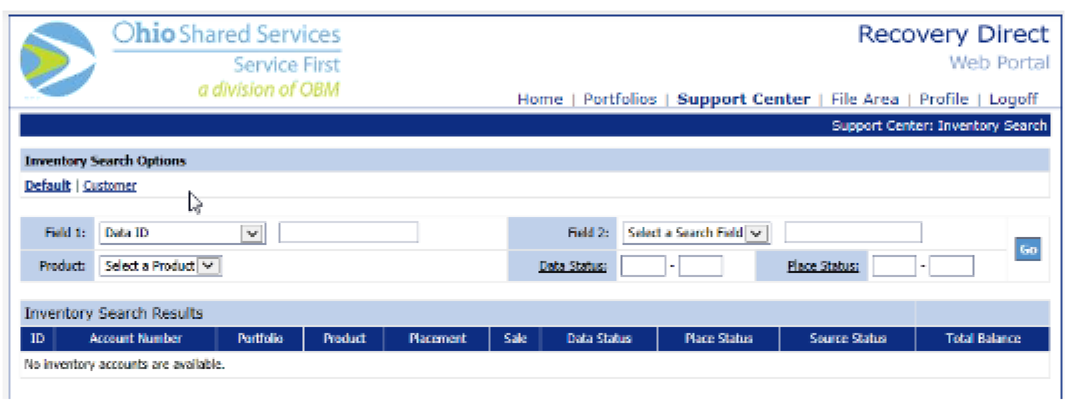


5. The Contact should click on the Portfolio Tab at the top of the page.

6. The Contact will be taken to the Portfolio page. The Contact should click on the Account Lookup Hyperlink. The Account Lookup allows the Contact to search for the Case number that they are attempting to view



7. The Contact then may utilize the following search options in order to locate the Case that the Contact is looking for using the Field 1 drop down selection. The table below describes the Fields available for selection for searching based upon



Field 1 Drop Down Selections

Field	**Description**
Data Id	Internal ID of the case Number, unique to the OSS Recovery Direct System
Primary Account Number	The Case Number
Secondary Number	The Number Code of the Case

8. The Contact may also click on the Customer Hyperlink to search for cases based upon Obligor level details. Clicking on the hyperlink will update the page to display with additional search options. The Contact may search for a Case based upon the following Obligor details by selecting the drop down option for searching.

Field	Description
SSN	The SSN of the Obligor
Last Name	The Last Name of the Obligor
Tax ID	The Tax ID of the Obligor
Home Phone	The Home Phone of the Obligor
Work Phone	The Work Phone of the Obligor

9. Once the Contact has selected the field that they would like to search on, and entered in the corresponding data, they will click on the Go Button to perform the Inventory Search
10. The page will update and display with the results that match the search information that was entered. The table below describes the results from the search. The Default and Customer search both have separate results from their use. The below table lists the Default Search Results. These results may be exported by clicking on the Green Excel icon in the upper right hand corner of the page. This will download the results as an Excel File that will be saved locally

Field	Description
ID	The internal ID of the Case
Account Number	The Case Number
Portfolio	The internal Portfolio ID associated with the account
Product	The Account Product Name
Placement	The Collection Vendor Number within the OSS System
Sale	The Sale number Associated with the Account (Not Applicable with JFS Accounts)
Data Status	The Inventory Account Status associated with the account. This is a 6 digit code. The first 3 numbers represent the current status. 100 and

	300 level are active accounts, 900 are closed accounts.
Place Status	The Placement (Collection Vendor Status) if populated designates that collection activity is currently occurring.
Source Status	Will display with Written Off for all Cases
Total Balance	The Total Current Arrears balance of the Case

11. The below table describes the Customer Search results

Inventory Search Results

ID	Last Name	First Name	SSN	State	Placement	Sale	Data Status	Total Balance
200 total accounts(s) matched your search. Records 1 to 100. Use the Next and Previous links below to view additional accounts.								
664P000000001	Doe	John	-	OH	139	-	302-000	$4,500.00
664P000000002	Doe	John	-	OH	139	-	301-000	$5,000.00

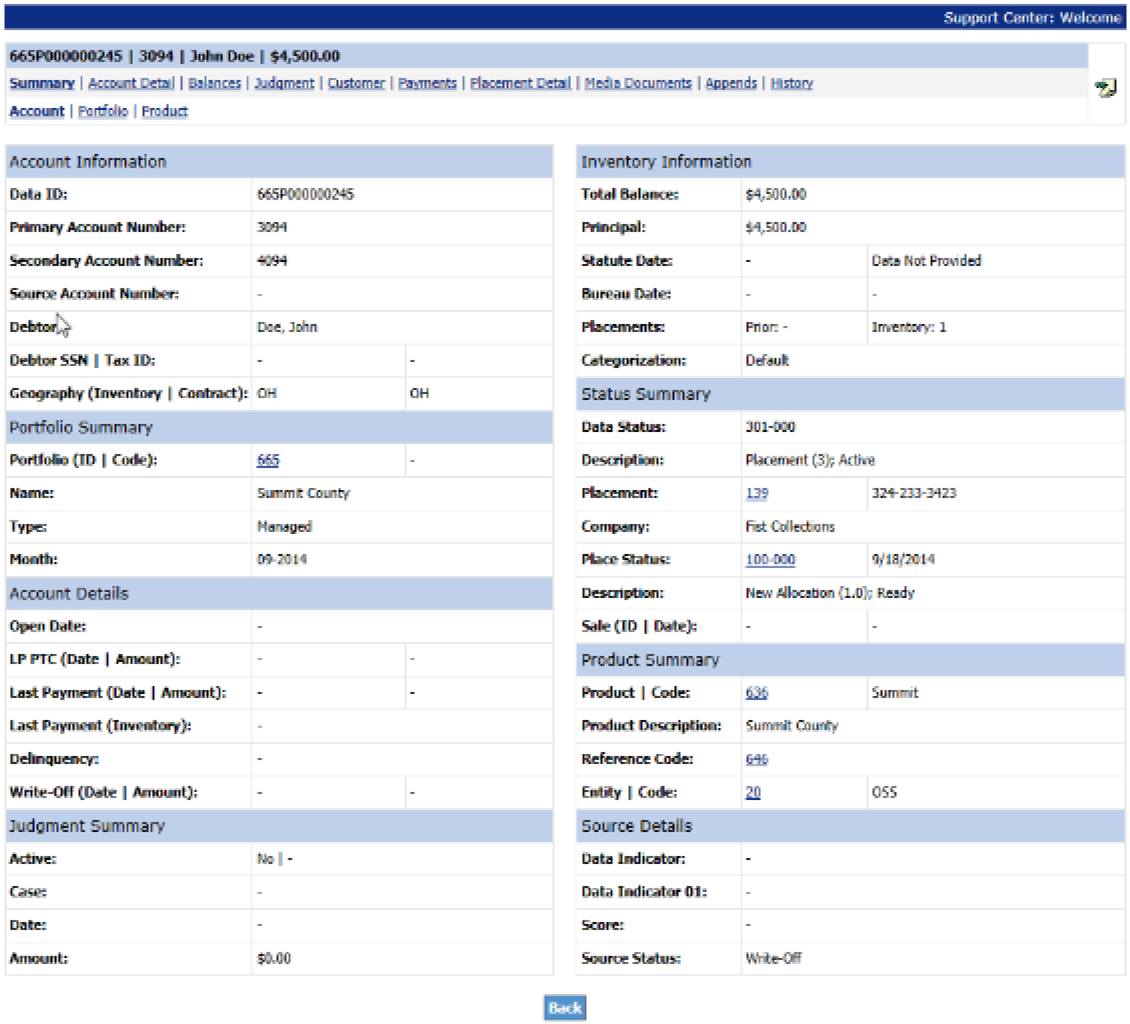
Field	**Description**
Id	The internal ID of the Case
Last Name	The Obligors Last Name
First Name	The Obligors First Name
SSN	The Obligors SSN
State	The State of the Obligor
Placement	The Collection Vendor Number within the OSS System
Sale	The Sale number Associated with the Account (Not Applicable with JFS Accounts)
Data Status	The Inventory Account Status associated with the account. This is a 6 digit code. The first 3 numbers represent the current status. 100 and 300 level are active accounts, 900 are closed accounts.
Total Balance	The Total Current Arrears balance of the Case

12. Once the Contact has located the Case that they would like to view the details for, they will click on the ID Hyperlink.

Inventory Search Results

ID	Last Name	First Name	SSN	State	Placement	Sale	Data Status	Total Balance
200 total accounts(s) matched your search. Records 1 to 100. Use the Next and Previous links below to view additional accounts.								
664P000000001	Doe	John	-	OH	139	-	302-000	$4,500.00
664P000000002	Doe	John	-	OH	139	-	301-000	$5,000.00

13. The page will update to display the Case Details for the ID that was selected. The Contact will first arrive at the Summary Page. This page will display with high level information regarding the Case, including the Arrears Balance, the Case and Number Code.



Support Center: Welcome

665P000000245 | 3094 | John Doe | $4,500.00

Summary | Account Detail | Balances | Judgment | Customer | Payments | Placement Detail | Media Documents | Appends | History

Account | Portfolio | Product

Account Information		
Data ID:	665P000000245	
Primary Account Number:	3094	
Secondary Account Number:	4094	
Source Account Number:	-	
Debtor:	Doe, John	
Debtor SSN | Tax ID:	-	-
Geography (Inventory | Contract):	OH	OH
Portfolio Summary		
Portfolio (ID | Code):	665	-
Name:	Summit County	
Type:	Managed	
Month:	09-2014	
Account Details		
Open Date:	-	
LP PTC (Date | Amount):	-	-
Last Payment (Date | Amount):	-	-
Last Payment (Inventory):	-	
Delinquency:	-	
Write-Off (Date | Amount):	-	-
Judgment Summary		
Active:	No | -	
Case:	-	
Date:	-	
Amount:	$0.00	

Inventory Information		
Total Balance:	$4,500.00	
Principal:	$4,500.00	
Statute Date:	-	Data Not Provided
Bureau Date:	-	-
Placements:	Prior: -	Inventory: 1
Categorization:	Default	
Status Summary		
Data Status:	301-000	
Description:	Placement (3); Active	
Placement:	139	324-233-3423
Company:	Fist Collections	
Place Status:	100-000	9/18/2014
Description:	New Allocation (1.0); Ready	
Sale (ID | Date):	-	-
Product Summary		
Product | Code:	636	Summit
Product Description:	Summit County	
Reference Code:	646	
Entity | Code:	20	055
Source Details		
Data Indicator:	-	
Data Indicator 01:	-	
Score:	-	
Source Status:	Write-Off	

Back

14. The Contact will utilize the tabs at the top of the page to view additional information regarding the Case. The following describe the pertinent tabs to be utilized when attempting to view information regarding the case
15. The contact should click on the Customer Tab to see additional Obligor Details, such as address specific information

664P000000001 | 1000 | John Doe | $5,000.00

Summary | Account Detail | Balances | Judgment | Customer | Transactions | Placements | Sales | Documents | Appends | History

Detail | Additional Information

View | Edit

Primary Customer Information		Secondary Customer Information	
Primary SSN:	-	Secondary SSN:	-
Primary Tax ID:	-	Secondary Tax ID:	-
Primary First:	John	Secondary First:	-
Primary Middle:	-	Secondary Middle:	-
Primary Last:	Doe	Secondary Last:	-
Primary Name:	Doe, John	Secondary Name:	-
Primary Suffix:	-	Secondary Suffix:	-
Primary Company:	-	Secondary Company:	-

16. The Contact should click on the Transactions tab to view all transactions that have occurred on the account within the OSS system

665P000000229 | 3078 | John Doe | $4,500.00

Summary | Account Detail | Balances | Judgment | Customer | Transactions | Placements | Sales | Documents | Appends | History

Transaction History (new transaction)

ID	Placement	Created	Pay Date	Amount	Type	Source
1 total items.						
12704	-	9/23/2014 9:17:48 AM	9/23/2014	$500.00	1000	Inventory

Historical Transactions

ID	Placement	Created	Pay Date	Amount	Type	Source
There are no historical transactions for this account.						

17. The Contact should click on the Placement tab to view all placement details of the account with collection vendors

665P000000229 | 3078 | John Doe | $4,500.00

Summary | Account Detail | Balances | Judgment | Customer | Transactions | Placements | Sales | Documents | Appends | History

Placement History

ID	Placement	Pool	Status	Placed	Recalled
1134692	139 Fist Collections	11589	100-000 New Allocation (1.0); Ready	9/18/2014	-

18. The Contact should click on the Document tab to view and download any documents that have been appended to the account

665P000000228 | 3077 | John Doe | $5,000.00

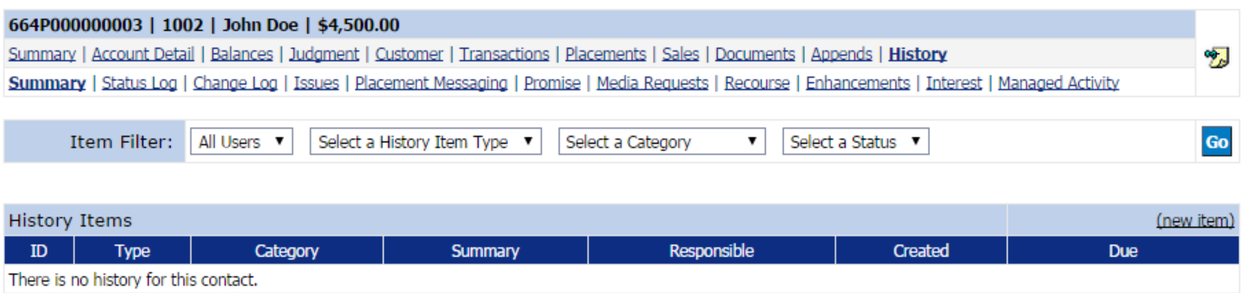
Summary | Account Detail | Balances | Judgment | Customer | Transactions | Placements | Sales | Documents | Appends | History

Available Media Documents (new document)

ID	Type	Document Date	Created	Created By	Available	Attachments
906507	Proof Of Debt	-	9/23/2014	Steven Hloros	Yes	• Proof Of Debt.pdf

19. The user should click on the Appends tab to view any of the following append types
    - **Activity**
    - **Contact**
    - **Asset**
    - **Employer**
    - **Bankruptcy**
    - **Deceased**
    - **Receivership**

20. The Contact should click on the History tab in order to see historical information and changes on the account. Once the History tab is selected, the page will update to display additional options within history. The following lists the additional details that may be selected



- **Summary** – This will display with all history items on the account, both open and closed
- **Change Log** – A listing of account level changes that have occurred, showing both the previous and new value, along with the user that made the change, when the change was made, and how the change was made
- **Issues** – A listing of all issues on the case
- **Placement Messaging** – Any messages created by the collection vendor regarding the account
- **Promise** – A listing of all promise to pays on the case
- **Media Requests** – A listing of all media requests created for the case, both open and fulfilled