



Process:	Closure Request
Description:	The Contact has the ability to create a Closure Request to OSS for stopping collection activity on an account that is currently placed with OSS

Process Detail: This document details the process for Closure Request 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

[\(password help\)](#)

Account Logon

User Name:

Password:

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.



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Recovery Direct
Web Portal

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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.	1	\$500.00	-
Payments Last 30 Days	Payments that have been posted over the last 30 days.	5	\$2,500.00	-
Open Account History Items Assigned	Open Account History Items currently assigned that require attention.	0	-	-
Open Account History Items	Open Account History Items.	2	-	9/25/2014
Open Account Issues Assigned	Open Account Issues and disputes currently assigned.	0	-	-
Open Account Issues	Open Account Issues and disputes.	0	-	-
Media Activity				
Open Media Requests Ready for Fulfillment	Open Media Requests that are ready for fulfillment.	0	-	-
Inventory Account Append Activity				
Employer Appends	Employer Appends that currently require attention.	0	-	-

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

Home | **Portfolios** | Admin | Support | Logoff

Home | JFS

Home

Utilize this section to administer Managed Source items and Portfolios that are currently being outsourced/managed by CollectNext Recovery Solutions.

Portfolio Options

Section	Description
Portfolio Options	
Managed Sources	List of all Managed Sources that are available for your current company.
Managed Source Portfolios	List of all Portfolios that are available for your current company.
Source Transfers	List of all Source Transfers that are available for the Managed Source Portfolios in your current company.
Inventory Options	
Account Lookup	Search for an account that is available in a Managed Source Portfolio for the current company.

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

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Support Center: Inventory Search

Inventory Search Options

Default | Customer

Field 1: Data ID [] Field 2: Select a Search Field []

Product: Select a Product [] Data Status: [] - [] Place Status: [] - []

Go

Inventory Search Results

ID	Account Number	Portfolio	Product	Placement	Sale	Data Status	Place Status	Source Status	Total Balance
No inventory accounts are available.									

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.

Inventory Search Options

Default | [Customer](#)

Search: Additional:

Inventory Search Results

ID	Last Name	First Name	SSN	State	Placement	Sale	Data Status	Total Balance
No accounts are available.								

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

Inventory Search Results 

ID	Account Number	Portfolio	Product	Placement	Sale	Data Status	Place Status	Source Status	Total Balance
1 total account(s) matched your search.									
665P000000245	3094	665	Summit	139	-	301-000 (+)	100-000	Write-Off	\$4,500.00

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. The Contact will click on the Notepad Icon in the Upper Right Hand Corner of the page.



664P000000051 | 1050 | John Doe | \$5,000.00

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

History Items | Status Log | Change Log | Issues | Promise | Media Requests | Interest

14. This will bring the contact to the History Item Creation page. From here, they will create a new History Item for a Closure Request. The Page will update as shown below

Account Lookup | JFS

664P000000051 | 1050 | John Doe | \$5,000.00

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

History Items | Status Log | Change Log | Issues | Promise | Media Requests | Interest

History Item Details

Type:	Select a Type	Category:	Select a Category
Actual Date:	10/29/2014	Item Due:	10/29/2014 4:45 pm
Responsible Party:	Select a Responsible Party	Duration:	+ 0 0
Complete:	<input type="radio"/> Yes <input type="radio"/> No		
Summary:	<input type="text"/>		
Source:	-		
Detail:	<input type="text"/>		
Location:	<input type="text"/>		

14. The Contact will first click on the "Select A Type" drop down option. They will select the "Closure Request" option from the Drop Down

History Item Details

Type: Closure Request

15. The contact will then click on the Responsible Party Drop Down. This allows for the Contact to select that Ohio Shared Services should close the account. Ohio Shared Services should always be selected as the responsible party

Responsible Party: Ohio Shared Services

16. The Contact then should click on the "No" Radio button for the Complete Field. This will allow Ohio Shared Services to be contacted for the request

Complete: Yes No

17. The Contact then will need to type a Summary into the Summary Field. This should be a statement of the Request for Closure from OSS Collections.



Summary: Please Close this Account from OSS Recovery

18. The Contact should then designate in the Detail section the reason why the closure request is being submitted

History Item Details			
Type:	Closure Request	Category:	Select a Category
Actual Date:	10/29/2014	Item Due:	10/29/2014 4:45 pm
Responsible Party:	Ohio Shared Services	Duration:	+ 0 0
Complete:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Summary:	Please Close this Account from OSS Recovery		
Source:	-		
Detail:	This account is no longer valid for collections		
Location:			

19. Once the Contact has completed these steps, the Closure Request should look as shown below (With variation on the Summary and Detail based upon why the Contact is submitting the Closure Request)

20. The Contact then will click on the Save button at the bottom of the page

History Item Details			
Type:	Closure Request	Category:	Select a Category
Actual Date:	10/29/2014	Item Due:	10/29/2014 4:45 pm
Responsible Party:	Ohio Shared Services	Duration:	+ 0 0
Complete:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Summary:	Please Close this Account from OSS Recovery		
Source:	-		
Detail:	This account is no longer valid for collections		
Location:			
Add New Comment History			
Comments		Attachment	
		Choose File No file chosen	

[Save](#) [Back](#)

21. This will create the Closure Request with Ohio Shared Services/DN being notified, wherein the account will be closed from collection activity. No further steps are needed from the Contact