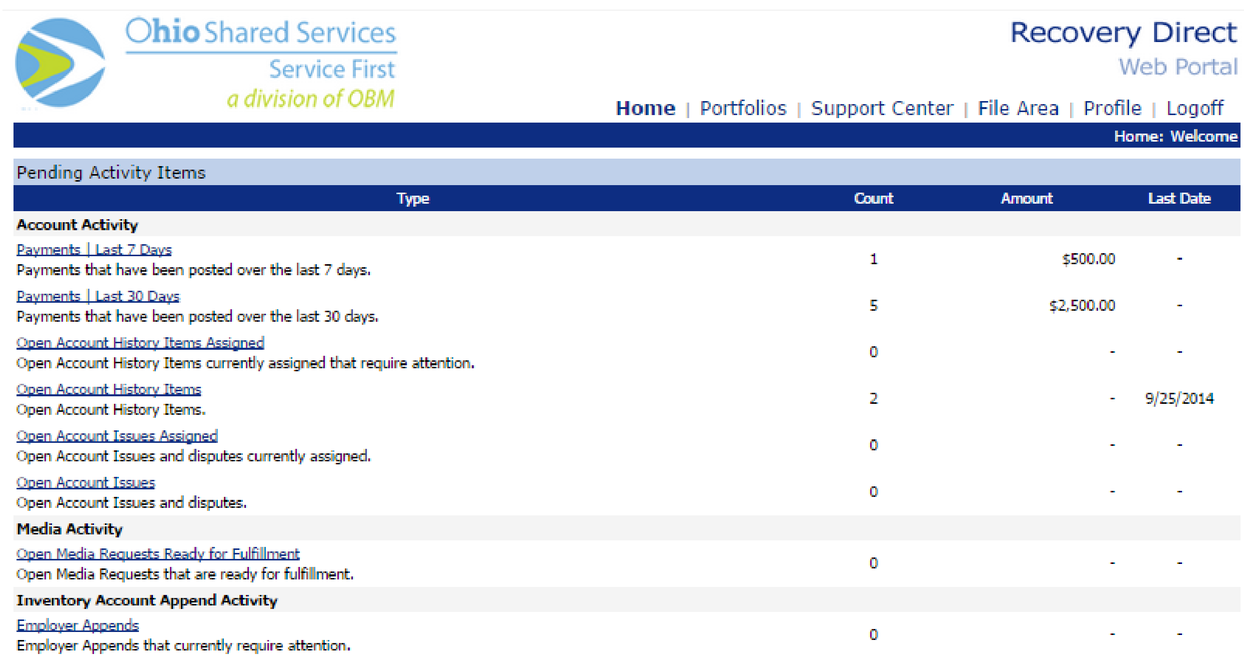
Process:	Closure Request
Description:	The Contact has the ability to create a Closure Request to OSS for stopping collection activity on an account that is currently placed with OSS

Process Detail: This document details the process for Closure Request in the OSS Web Portal

Steps

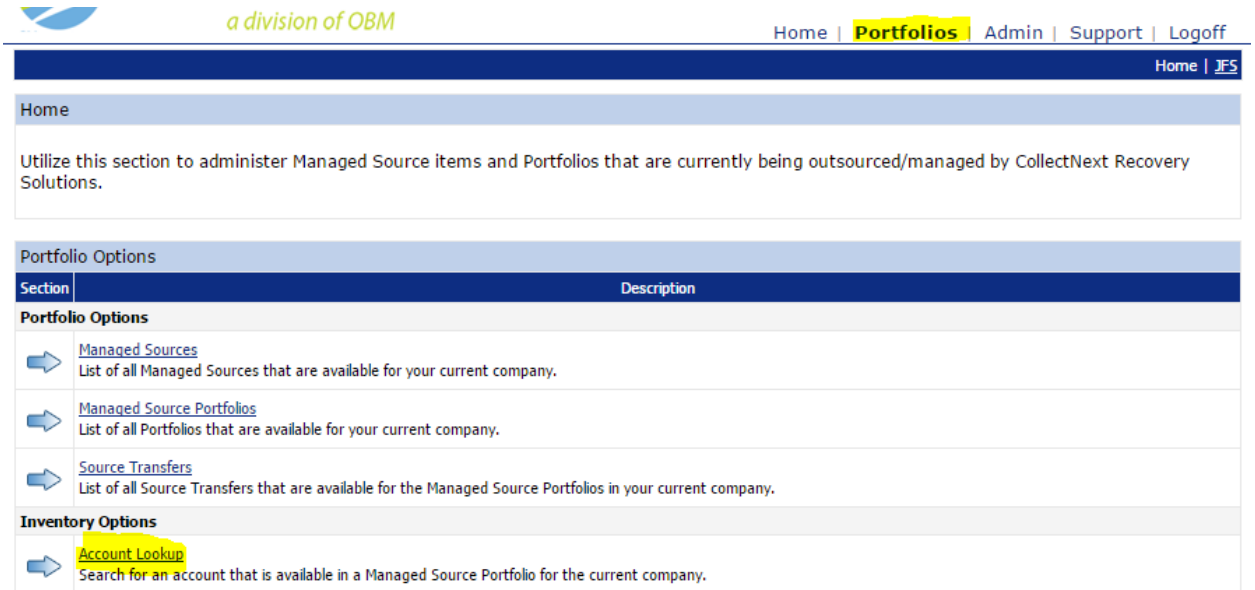
1. The Contact will need to navigate to the OSS Web Portal Login Site. The Contact will need to enter in the Account Logon information that they previously designated during the initial Sign Up for the OSS Web Portal.
2. The Contact should enter their User Name and Password into the Account Logon information

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.

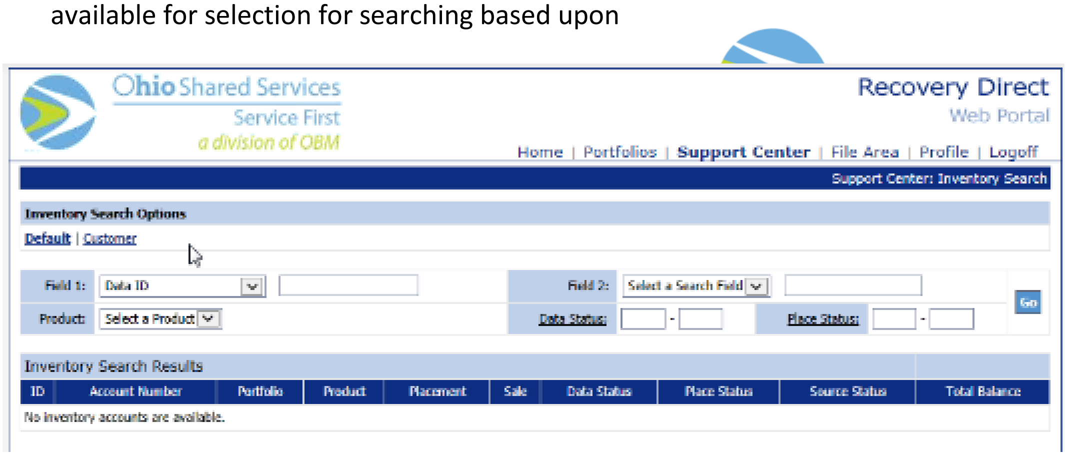


5. The Contact should click on the Portfolio Tab at the top of the page.

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

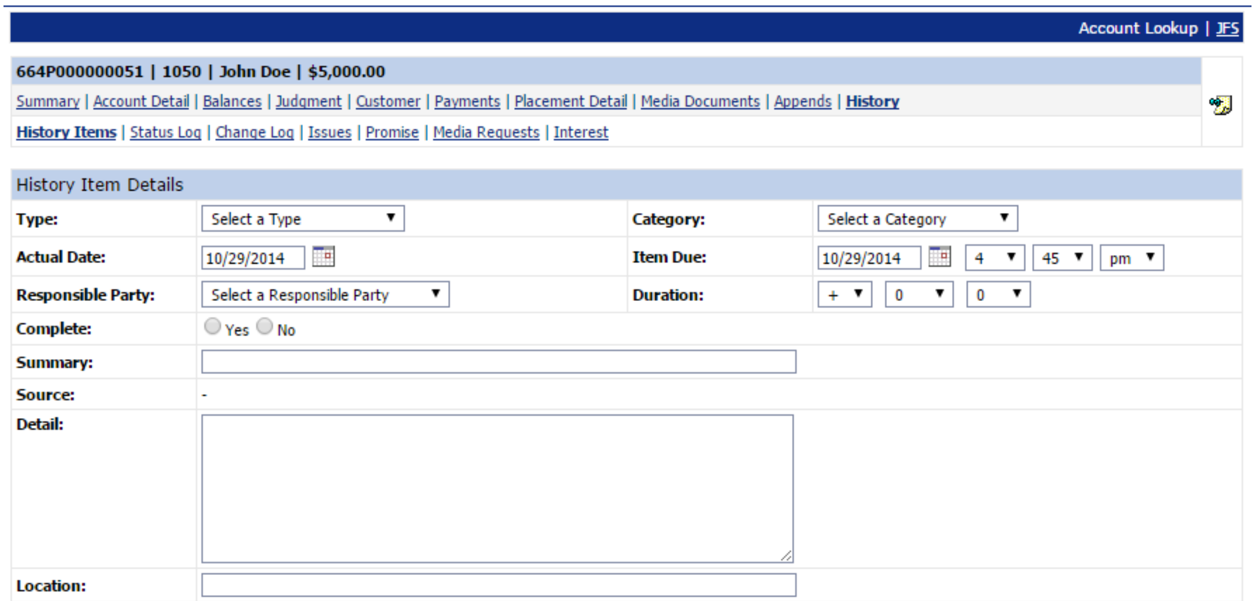
12. Once the Contact has located the Case that they would like to view the details for, they will click on the ID Hyperlink.

Inventory Search Results

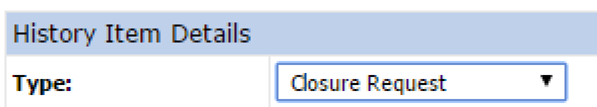
ID	Last Name	First Name	SSN	State	Placement	Sale	Data Status	Total Balance
200 total accounts(s) matched your search. Records 1 to 100. Use the Next and Previous links below to view additional accounts.								
664P000000001	Doe	John	-	OH	139	-	302-000	$4,500.00
664P000000002	Doe	John	-	OH	139	-	301-000	$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. The Contact will click on the Notepad Icon in the Upper Right Hand Corner of the page.

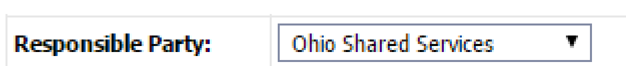
14. This will bring the contact to the History Item Creation page. From here, they will create a new History Item for a Closure Request. The Page will update as shown below



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

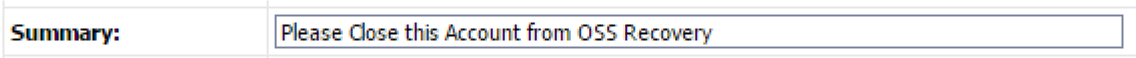


15. The contact will then click on the Responsible Party Drop Down. This allows for the Contact to select that Ohio Shared Services should close the account. Ohio Shared Services should always be selected as the responsible party

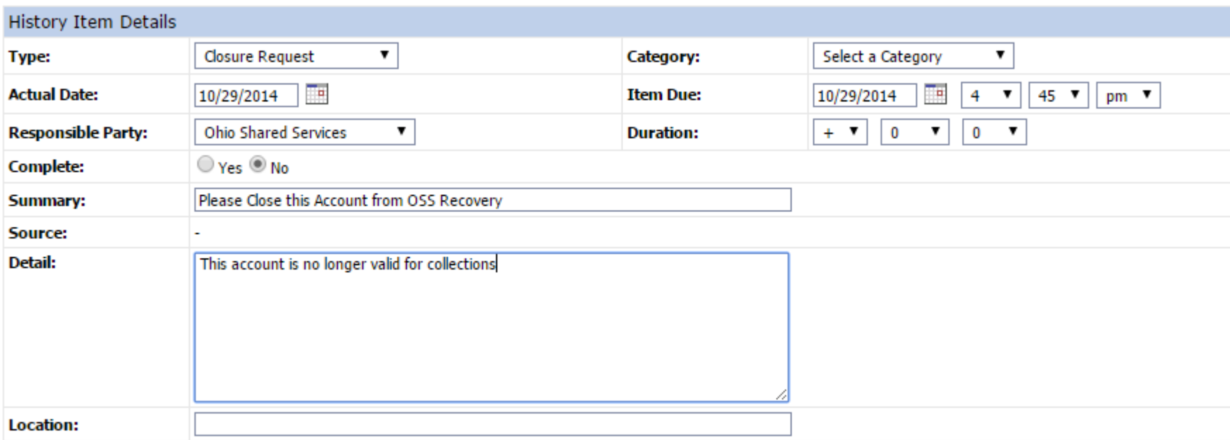


16. The Contact then should click on the "No" Radio button for the Complete Field. This will allow Ohio Shared Services to be contacted for the request

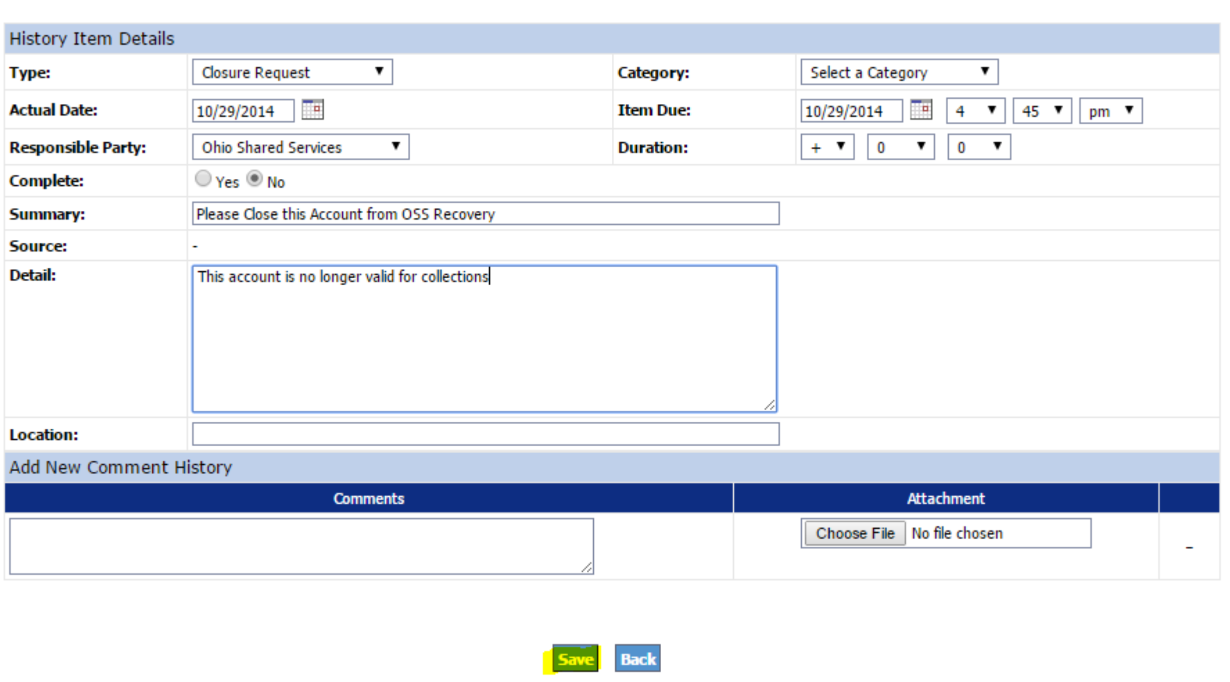
17. The Contact then will need to type a Summary into the Summary Field. This should be a statement of the Request for Closure from OSS Collections.



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



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



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