General Revenue Corporation Website User Guide

“My Accounts” Section

General Revenue Corporation ● 4660 Duke Drive, Suite 200, Mason, OH 45040 ● 800-234-1472, Option 2 ● Generalrevenue.com

Updated: 12/26/19

Introduction to “My Accounts” Section

- GRC is pleased to present this tutorial User Guide to our clients to facilitate your understanding of how to use our interactive, state-of-the art client portal located at Generalrevenue.com.
- The goal of this User Guide is to enable our clients to become familiar with the “My Accounts” section of the client portal.
- At your facility, as a new employee or an existing employee that needs a refresher course on the features of our website, this User Guide can assist with providing an overview of how to log into our client portal to obtain the wealth of information that is available to you 24 hours, 7 days a week.
- This step-by-step instructional guide was designed with you, our client, in mind by enabling you to utilize this information at your convenience.
- As you walk through this User Guide, please feel free to contact your dedicated Client Services Representative should you have any questions. Their contact information is shown on the last page of this tutorial entitled “Contact List of Personnel.”
- GRC appreciates the opportunity to provide this information to you; we hope you will find it helpful.

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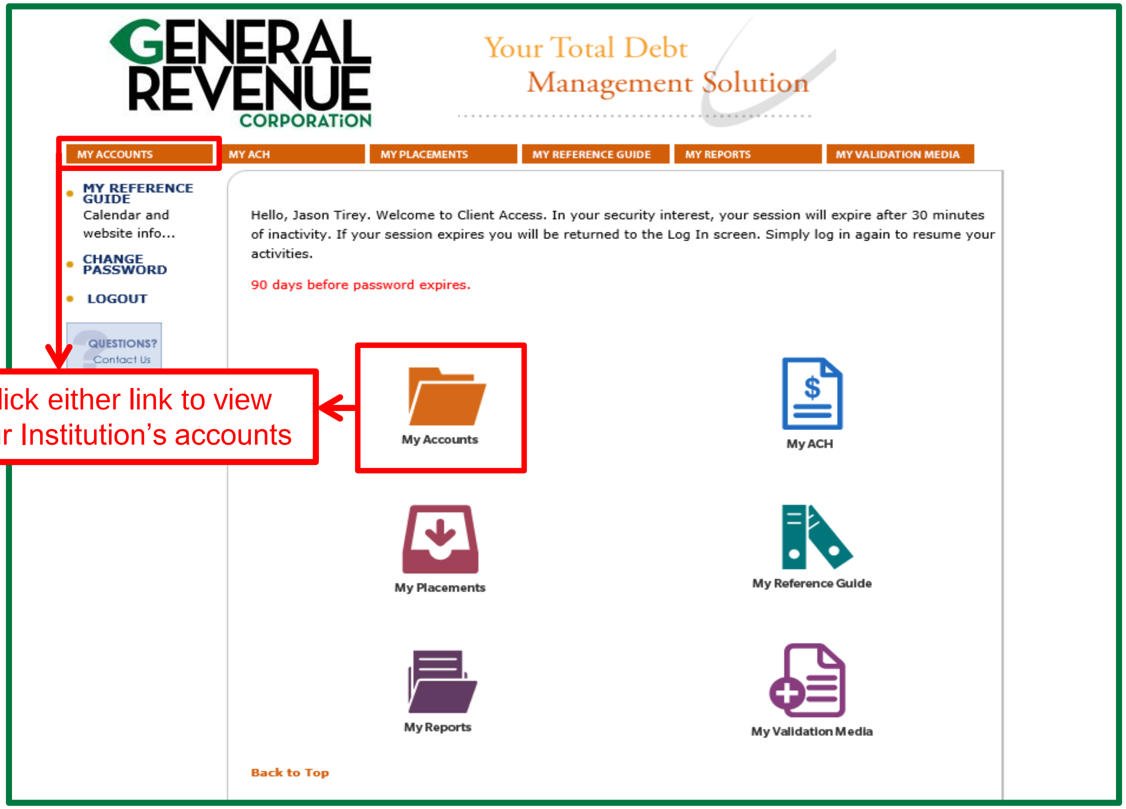
Features Covered Under “My Accounts” Section

This tutorial will highlight the features shown under the “My Accounts” icon. These features are as follows:

- ❑Master List Search – there are multiple ways to search for a student borrower such as first/last name or social security number or client account number
- ❑Individual List - once the student borrower has been selected, all accounts belonging to that student borrower are displayed
- ❑Balance Detail – displays the itemization of charges to total the outstanding balance due
- ❑Demographic Information – displays the address and phone numbers of the student borrower
- ❑Payment Arrangements – displays currently scheduled payments
- ❑Payment History – displays historical payments collected
- ❑Contact Summary – displays collection and system generated notes and provides a summary of total calls, contacts and letters sent
- ❑Direct Payment Entry – allows for the reporting of direct payments to GRC

*Note: All account information displayed on the following pages is fictitious in nature and created exclusively for this presentation.

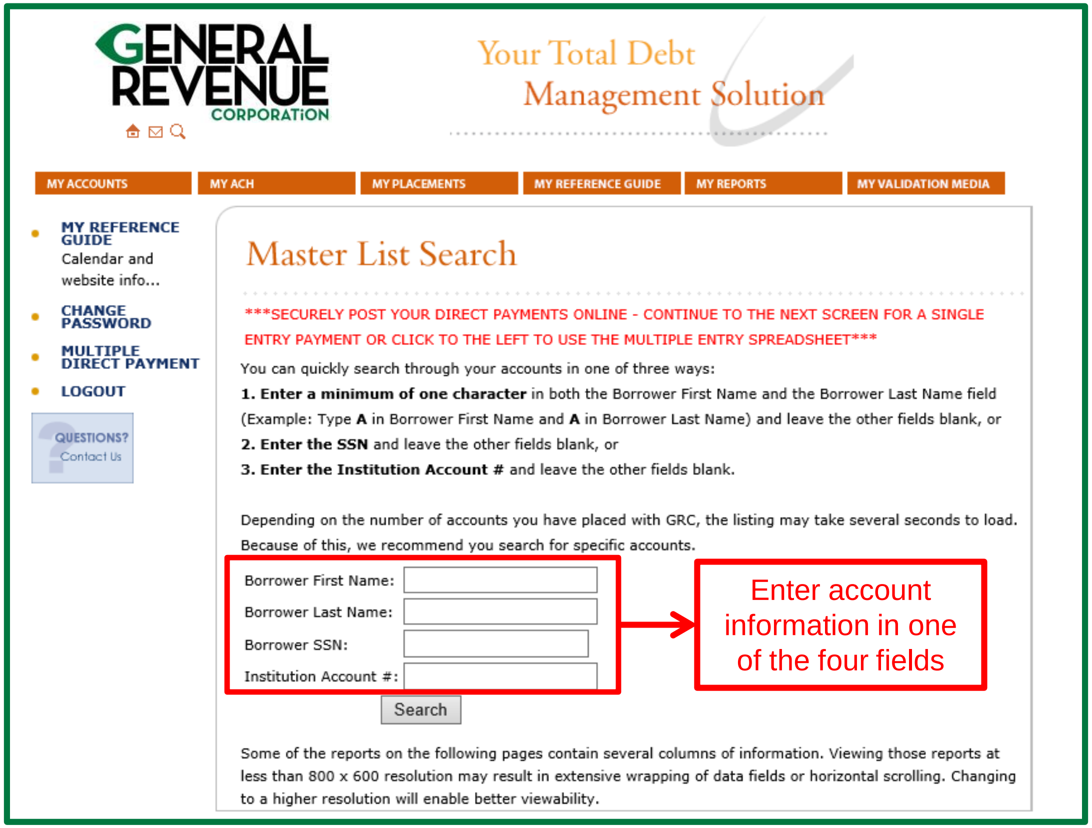
Home Screen



You have two options to access the “My Accounts” section:

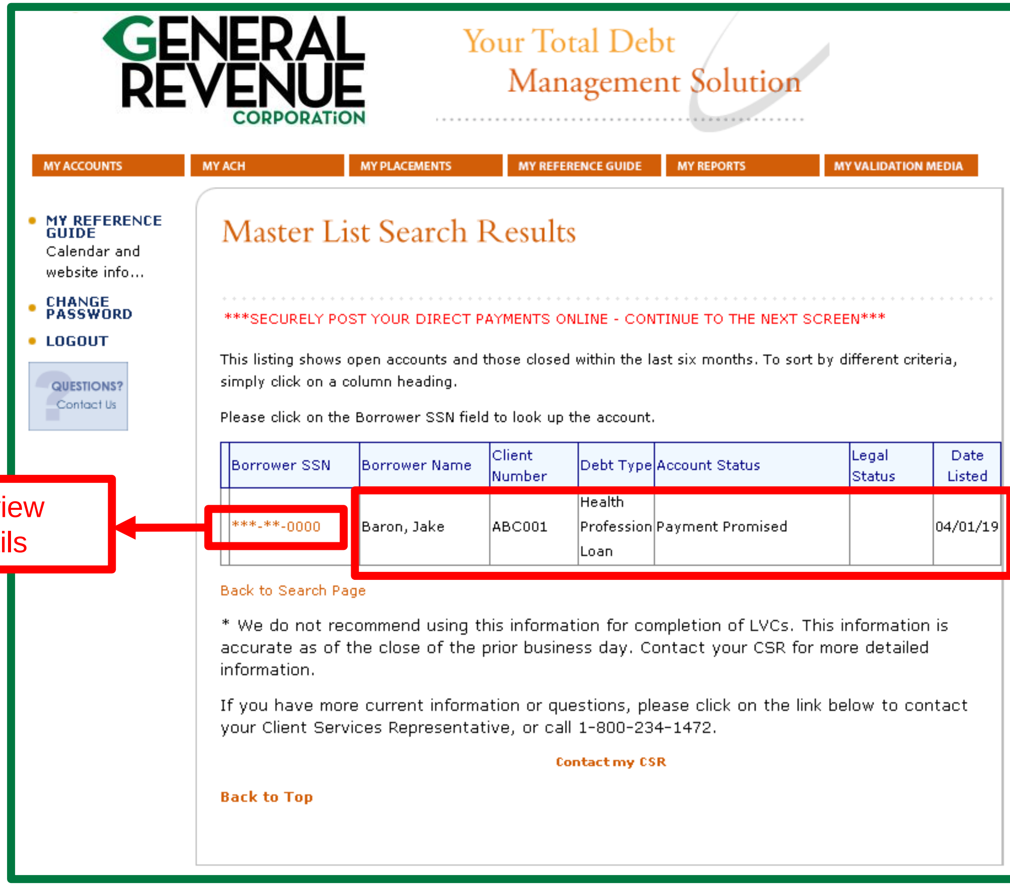
- By clicking in the toolbar
- By clicking on the icon picture

My Accounts Screen



The Master List functionality affords you the opportunity to search by first and last name OR social security number OR your client account number. The more specific the data you enter, the more concentrated the search results become. This gives you the ability to expand or narrow your search, based on your expectations.

Master List Search Results

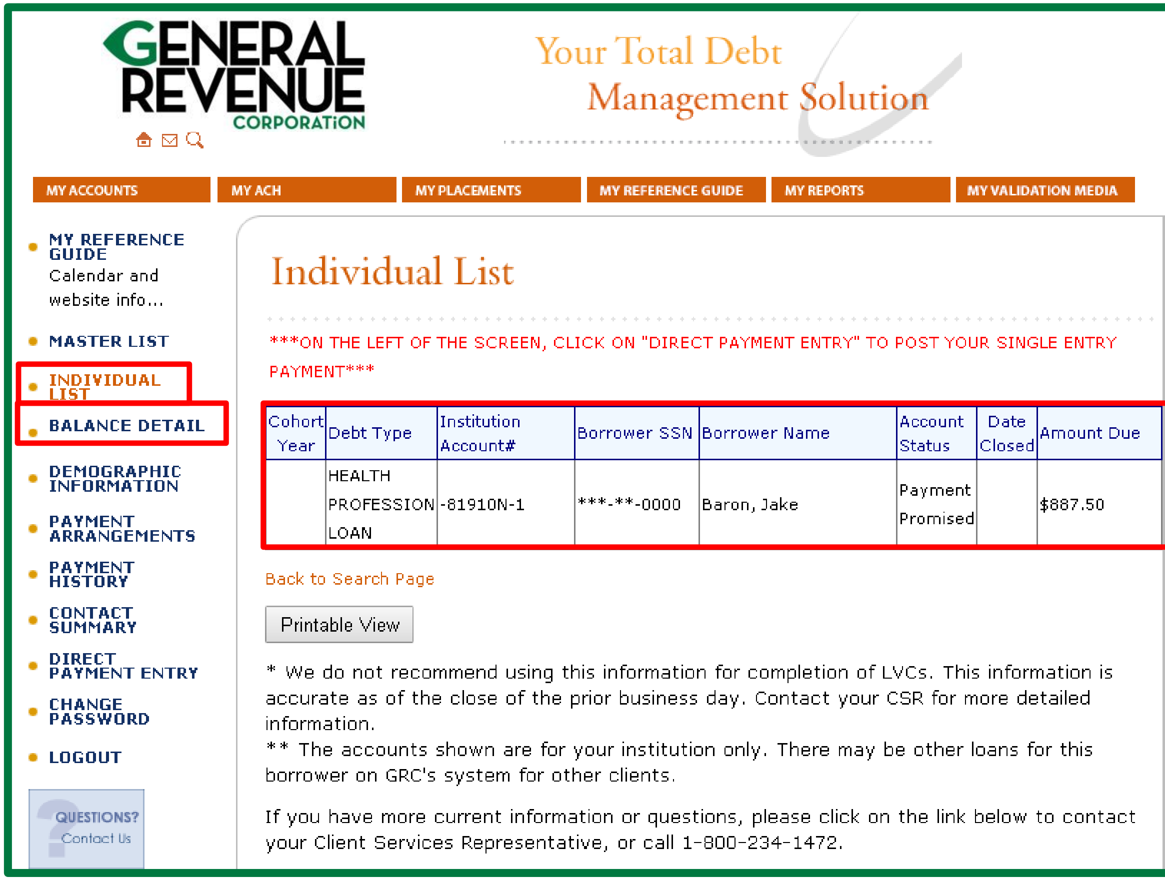


Click here to view account details

All accounts for the same student borrower are displayed

Based on how you search, you can view all accounts sharing similar traits in their name. Also, any student borrower having the same name or the same social security number will display on this screen. Once you decide which student borrower you want to view, click on that student borrower's social security number which has been masked to protect your student borrower's non-public information.

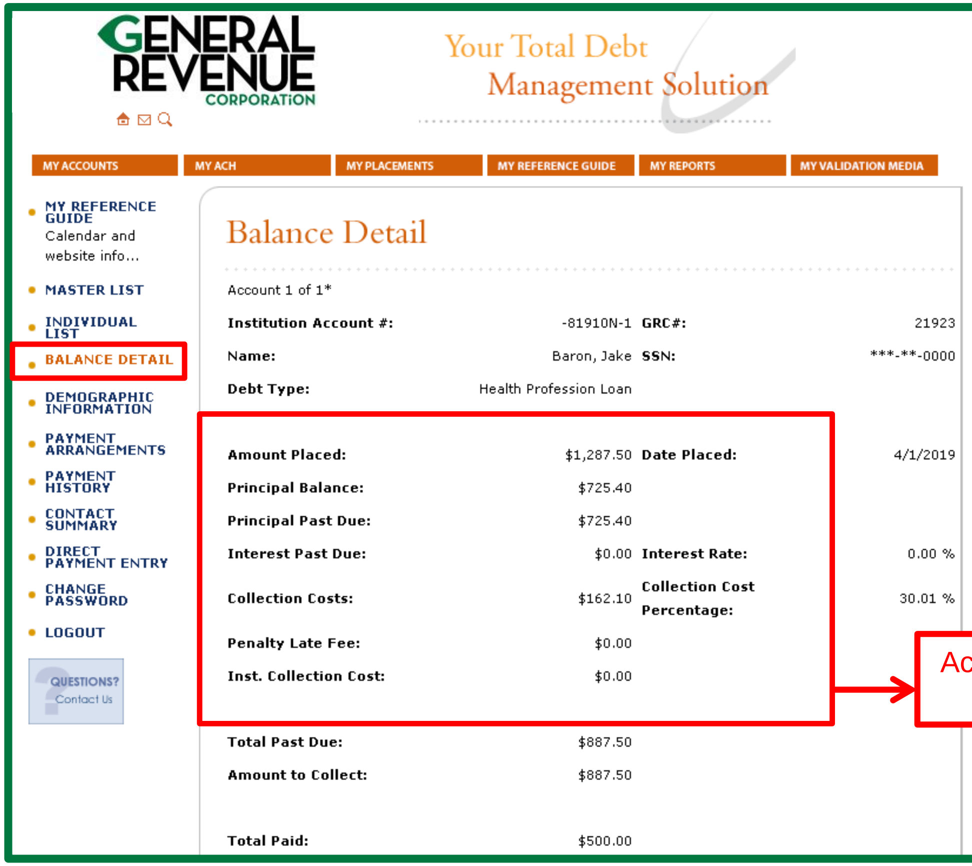
Individual List



All accounts for the same student borrower will be displayed

Once your selected account(s) appears, click "Balance Detail" on the left side of the screen to obtain account level detail on all accounts belonging to that student borrower.

Balance Detail



Account displays all amounts due

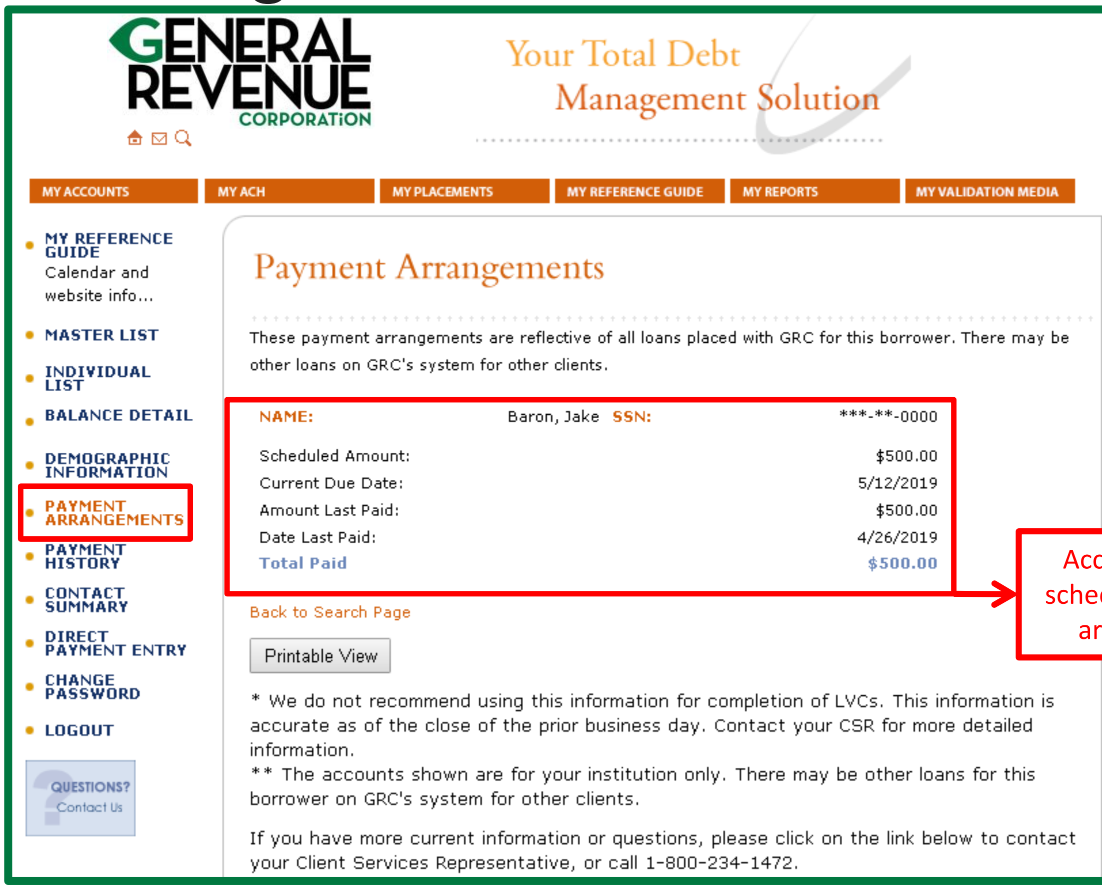
The “Balance Detail” screen displays the breakdown of the charges for the outstanding balance due for each account placed at GRC.

Demographic Information

Account displays personal data of the student borrower

By clicking on the "Demographic Information" on the left side of the screen, the view displays the contact information for that account holder such as address, phone numbers and place of employment.

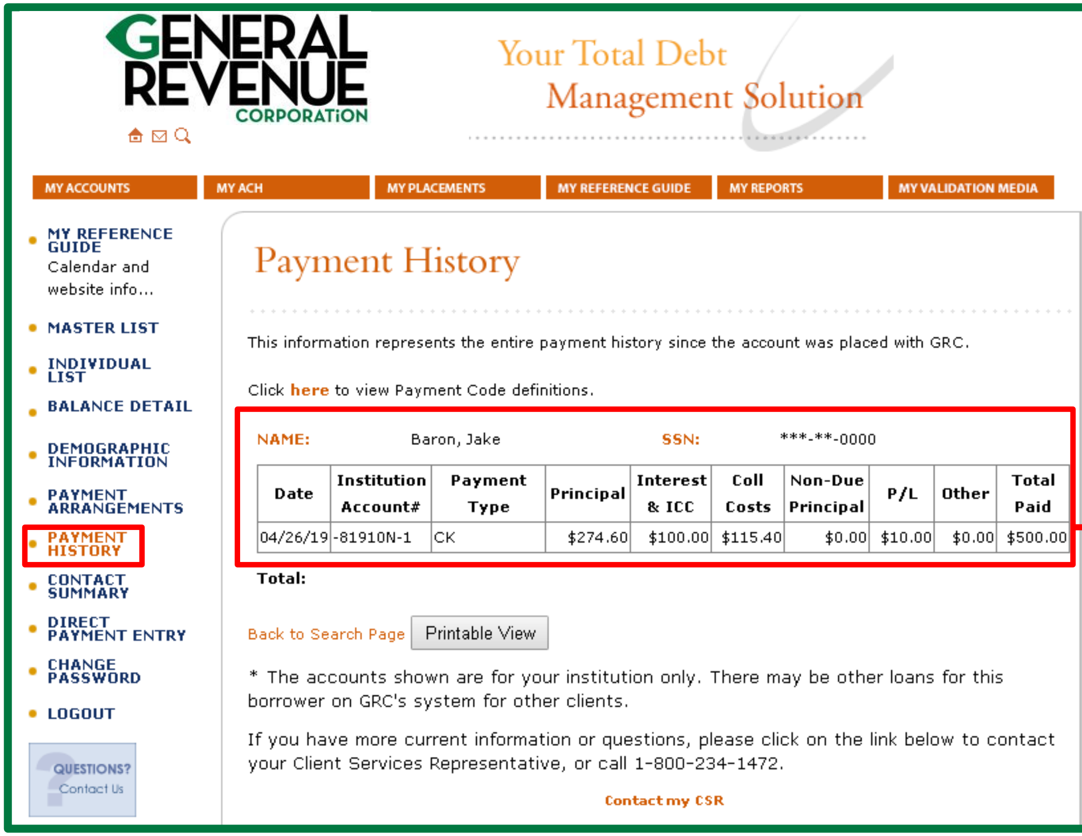
Payment Arrangements



Account displays scheduled payment arrangements

By clicking on “Payment Arrangements” on the left side of the screen, the view displays scheduled payment arrangements made with the student borrower. This view provides a summary of current payment activity.

Payment History



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Your Total Debt Management Solution

MY ACCOUNTS | MY ACH | MY PLACEMENTS | MY REFERENCE GUIDE | MY REPORTS | MY VALIDATION MEDIA

- MY REFERENCE GUIDE Calendar and website info...
- MASTER LIST
- INDIVIDUAL LIST
- BALANCE DETAIL
- DEMOGRAPHIC INFORMATION
- PAYMENT ARRANGEMENTS
- PAYMENT HISTORY
- CONTACT SUMMARY
- DIRECT PAYMENT ENTRY
- CHANGE PASSWORD
- LOGOUT

QUESTIONS? Contact Us

Payment History

This information represents the entire payment history since the account was placed with GRC.

Click **here** to view Payment Code definitions.

NAME: Baron, Jake **SSN:** ***-**-0000

Date	Institution Account#	Payment Type	Principal	Interest & ICC	Coll Costs	Non-Due Principal	P/L	Other	Total Paid
04/26/19	-81910N-1	CK	$274.60	$100.00	$115.40	$0.00	$10.00	$0.00	$500.00

Total:

Back to Search Page | Printable View

* The accounts shown are for your institution only. There may be other loans for this borrower on GRC's system for other clients.

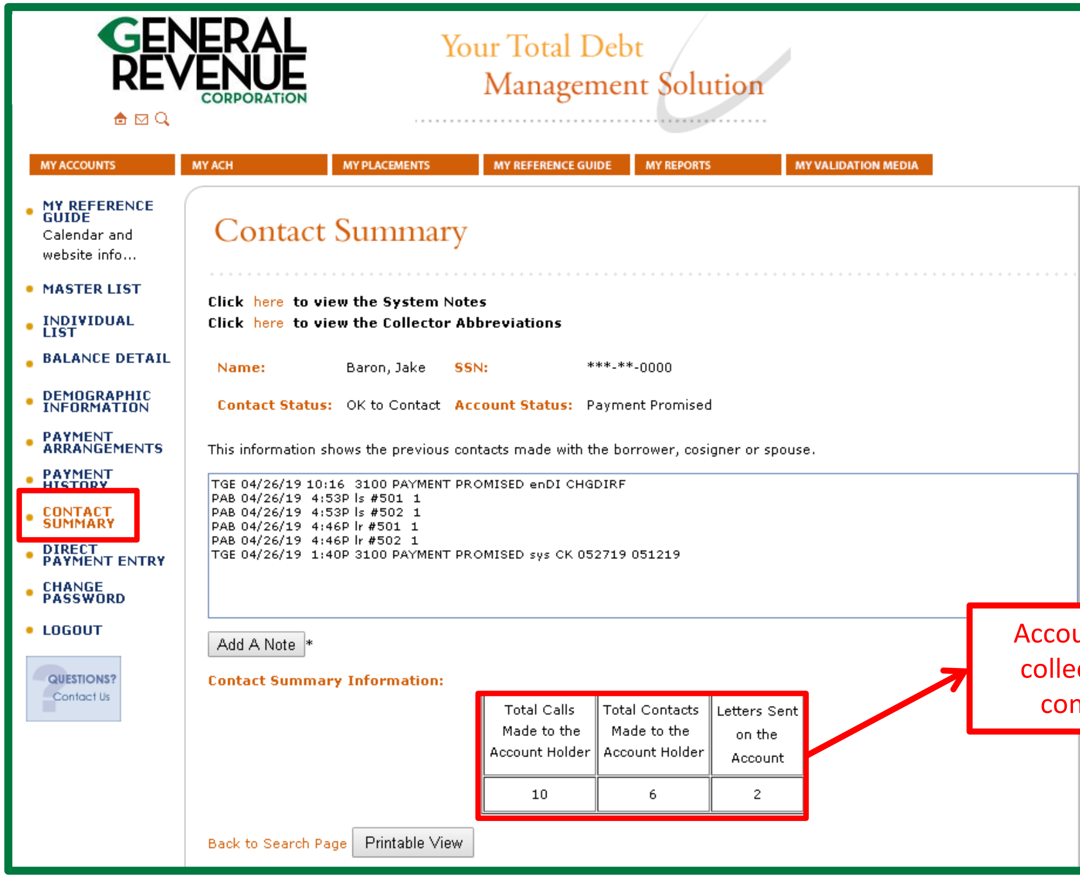
If you have more current information or questions, please click on the link below to contact your Client Services Representative, or call 1-800-234-1472.

Contact my CSR

Account displays history of payments collected

By clicking on “Payment History” on the left side of the screen, this view displays the history of previous payments collected over the last twelve (12) months for a student borrower’s account(s).

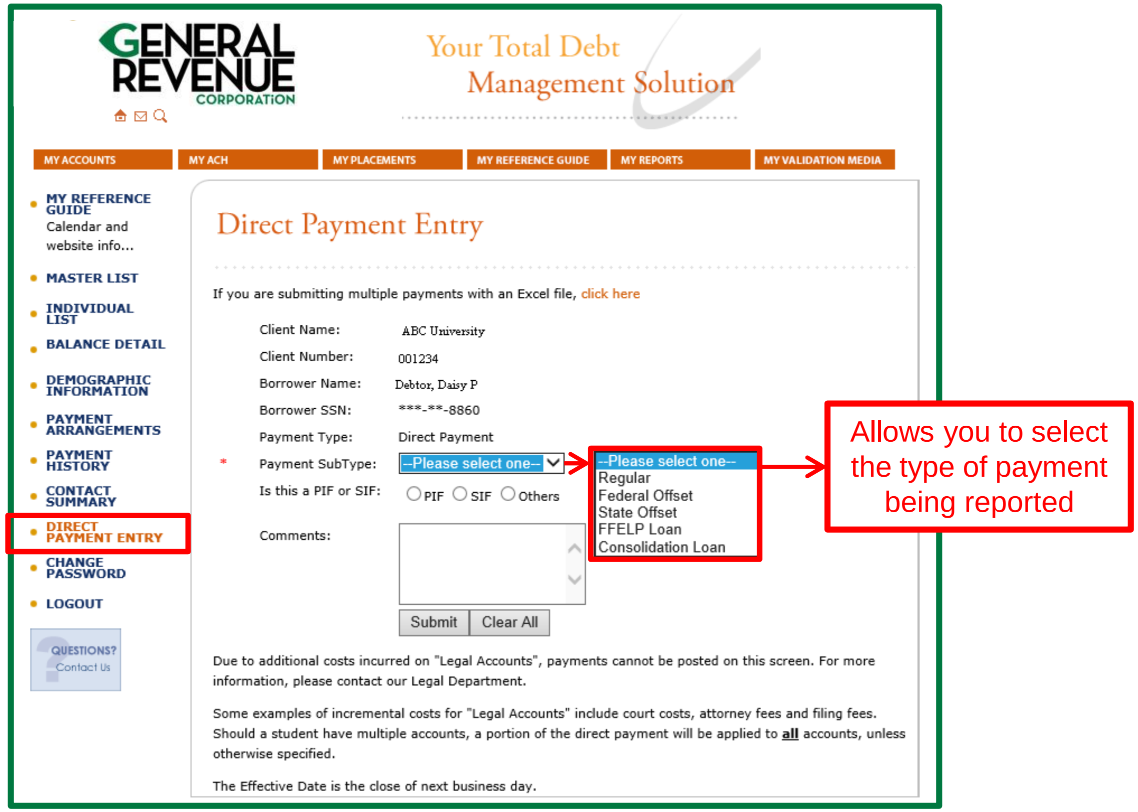
Contact Summary



Account displays summary of collection activities for calls, contacts and letters sent

By clicking on “Contact Summary” on the left side of the screen, this view provides the notes entered by the collector as well as system generated notes. You also have the option to enter a note on the account by clicking the “Add a Note” button. Additionally, this view provides a summary of the total calls, total contacts and total letters made or sent to the student borrower.

Direct Payment Entry



By clicking on the “Direct Payment Entry” on the left side of the screen, you may enter a direct payment, select the type of payment being reported and enter a message when submitting this payment to GRC. If a student borrower has multiple accounts, a portion of the payment will be applied to all accounts, unless otherwise specified. This feature ensures we post any payment received by you to this account in a timely manner.

Summary of “My Accounts” Section

There are a total of eight (8) screens under the “My Accounts” section that provide detailed information on the account selected. By continuously scrolling down the left side of the screen, you are able to obtain:

- ❑Account level “real time” detail such as balance information and demographic information
- ❑Collection level detail such as number of calls/contacts/letters sent, payments collected and future payment arrangements
- ❑Direct payment reporting to ensure payments collected at your location are posted by GRC to keep our balances reconciled

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GRC Office Information

This concludes the GRC User Guide Presentation for the “My Accounts” section under the client portal located at
Generalrevenue.com

We hope this User Guide was helpful by providing an overview of these sections of our website. The convenience of utilizing our website provides you with instantaneous access to your student borrower’s account information 24 hours, 7 days a week.

Our personnel, phone and email contact information is shown on the next two pages and we encourage you to contact us at your convenience.

Our client office hours are:
Monday through Thursday
8:00 AM to 6:00 PM EST
Friday
8:00 AM to 5:00 PM EST

Thank you for your business!
Phone: 800-234-1472. Fax 800-234-5035

Client Services Contact Information

Client Toll Free Numbers			
Phone: 800-234-1472, Option 2		Fax: 800-234-5035	Website: Generalrevenue.com
Name	**Title**	**Phone**	**Email Address**
Jennifer Hamilton	Client Services Liaison Supervisor	800-234-1472, Extension 427344	Jennifer.Hamilton@generalrevenue.com
Angela Breving	Senior Client Services Representative	800-234-1472, Extension 427336	Angie.Breving@generalrevenue.com
Brandy Cordy	Senior Client Services Representative	800-234-1472, Extension 427354	Brandy.Cordy@generalrevenue.com
Nikki Crabtree	Client Services Representative	800-234-1472, Extension 427357	Nikki.Crabtree@generalrevenue.com
Des Penno	Client Services Representative	800-234-1472, Extension 427304	Desiree.Penno@generalrevenue.com
Sandie Morgan	Client Services Representative	800-234-1472, Extension 427440	Sandie.Morgan@generalrevenue.com

Sales Executive Contact Information

Name	Title	Phone	Fax	Email Address
Denyc Perez	Director of Sales, Southwest Region	877-572-5543	888-888-3460	denyc.perez@generalrevenue.com
Sue Jaquish	Director of Sales, East Region	800-836-1099	888-287-0640	sue.jaquish@generalrevenue.com
Daphne Ware-Brown	Director of Sales, Midwest Region	513-605-7454	800-234-5035	daphne.ware-brown@generalrevenue.com
Nick Heldman	Account Manager	513-605-7494 (Direct) 800-234-1472, ext. 427494	800-234-5035	nick.heldman@generalrevenue.com

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