Client Portal Frequently Asked Questions

1. **How do I reset my password?**
    - On the client login page, select “Forgot Password?”
    - On the next screen, enter your Client Login, Last Name, Mother’s Maiden Name, and E-mail Address to reset your password.
    - Once our system verifies that you provided the correct answers, a temporary password will be sent to your e-mail.
    - If you cannot provide this information, or receive an error message, please contact your Client Services Representative.
    - Once you receive your temporary password to log in type in the temporary password letter by letter instead of copying and pasting.
    - Passwords are case sensitive, make sure your Caps Lock key is not on.
    - Upon logging in, the system will request that you change your password.
    - Your new password can accept letters, numbers and special characters such as !, @, #, $, %, ^, and &; your new password must be at 8 to 20 characters in length.
    - Passwords must contain 3 of the following: lowercase, uppercase, number, symbol

2. **How long will my password work before I have to change it for security purposes?**
    - 90 days.

3. **How do I download a report from the website into Excel?**
    - First, select “My Reports” and then select the report desired.
    - After selecting the report you wish to download, click “View” in the preferred format.
    - The report will automatically open in a separate window. Within this window, you can choose to view, print, or save the report.
    - Invoices are available in PDF format only. Other reports are available in both PDF and Excel format.

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4. **How do I contact my Client Services Representative via the website?**
    - You can email your Client Services Representative by either:
        a. Clicking on the small envelope at the top of each page;
        b. Selecting "Contact my CSR" at the bottom of most web pages;
        c. Selecting" Contact Us" at the very bottom of each web page.

5. **How many times can I try to log in before I am locked out?**
    - You can attempt to log in 5 times before you will be locked out and need to request a new password.

6. **I entered comments on an account, but they do not appear on the account immediately. What did I do wrong?**
    - Nothing -- Notes entered are sent to your Client Services Representative, who must approve them before they become a part of the permanent record. They will not show on the collection note screen until the Representative approves the notes.

7. **How long are reports available on the website?**

Report Name	Availability
Acknowledgment Report (ACK)	Available for 90 days
Balance Report	Available for a rolling 12 months' cycle
Bankruptcy Report	Available for a rolling 12 months' cycle
Cohort Summary Report	Available for a rolling 12 months' cycle
Closed Accounts Report	Available for a rolling 12 months' cycle
Daily Debtor Status Report (DSR)	Available for 1 day
Monthly Debtor Status Report (DSR)	Available for 60 days
Yearly Debtor Status Report (DSR)	Available July 1 of the previous year to June 30 of the current year
Demographic Report	Available for 60 days
Invoice Statement	Available for a rolling 12 months' cycle
Placement Analysis Report (PAR)	Available for a rolling 12 months' cycle

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8. How can I sort the reports under the "My Report" screen?

- Hyperlinks at the top of each report allow you to sort based on:
    - debt types
    - client number
    - run date

9. When I look up an account on the inquiry screen by entering the debtor name and Social Security Number, the system tells me there is no account on file. What is the issue?

- You can look up an account in 1 of 3 ways:
    - Input last name and first initial (ex., Johnson E)
    - Input Social Security Number without hyphens (ex.XXXXXXXXX)
    - Input your institutional account number
- If you enter data in multiple fields, the system will not recognize the account.

10. A debtor called my office and told me he paid his past due balance over the phone, but the account does not appear to be paid on the website. Is there a problem with accounting?

- Phone payments can take at least 24 hours to show on the website after they are made. You can verify the payment through the collector notes.

11. I don't see many address changes for my debtors on the "Demographic Report." How can I be sure that address/phone change information is being captured and shown correctly?

- Only "verified" demographic changes will appear on the Demographic Report. Verified changes are confirmed by speaking with the debtor or a reliable third party who has current knowledge of the debtor's current demographic information.

12. I don't want to receive email notifications when my reports are available on the website. How can I elect to stop receiving these email notifications?

- Contact your Client Services Representative and ask him or her to remove you from email notifications. This change will take effect immediately.

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