General Revenue Corporation Website User Guide

"My Placements" 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 Placements” Section

- GRC is pleased to present this tutorial User Guide to our clients to facilitate your understanding of how to utilize 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 Placements” section of the client portal.
- At your facility, as a new employee or an existing employee that needs a refresher course on this section, this User Guide can assist with providing an overview of how to place individual or multiple accounts in order to expedite the placing and collecting on your accounts.
- 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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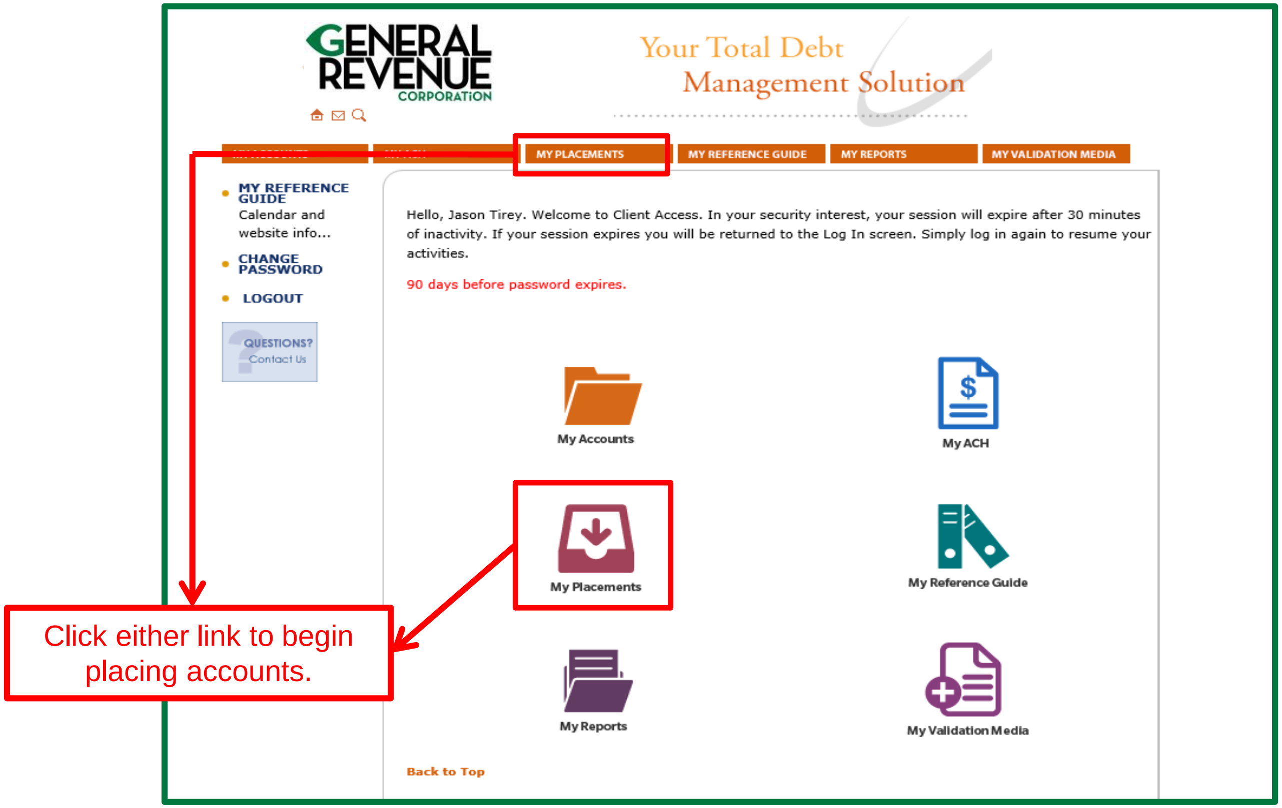
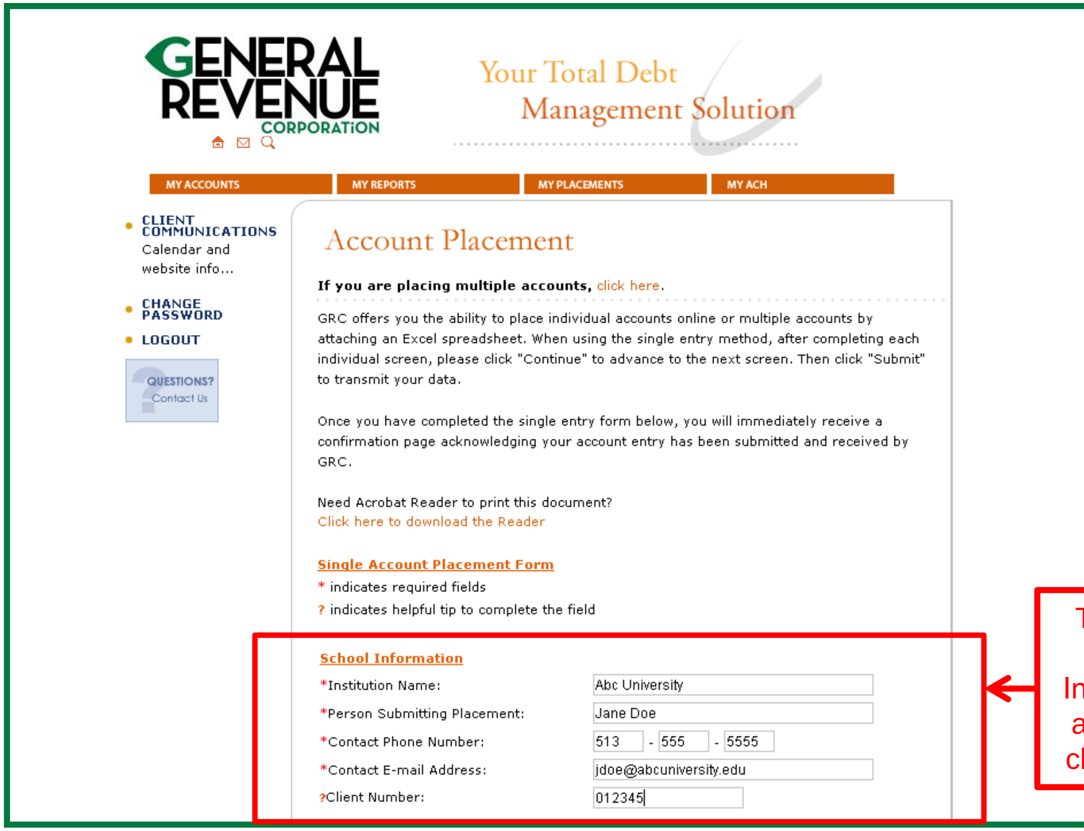
Home Screen



After you have logged into our client portal, you have two options to access the “My Placements” section:

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

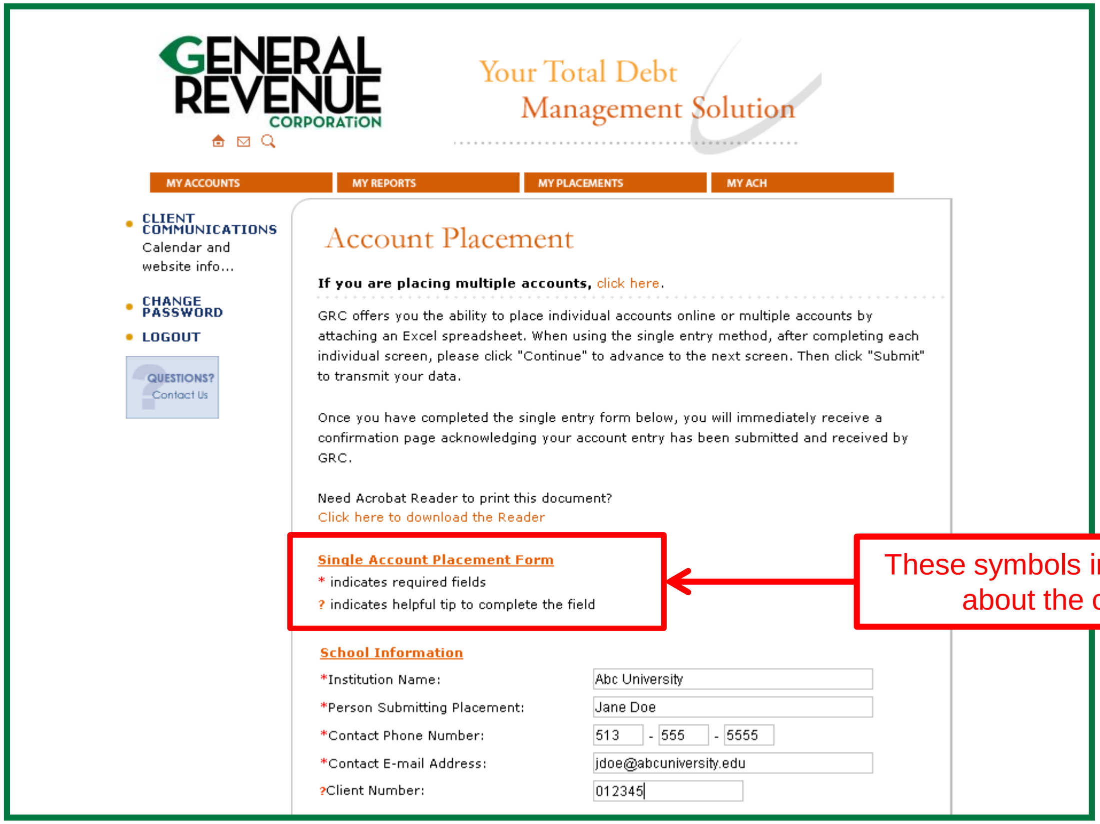
Single Entry Placement



These boxes are required to be populated with your Institution's information before accounts can be placed. The client number field is optional.

Enter your Institution Name and your contact information which will facilitate in placing your accounts with us. If you are uncertain of which client number to use, this field can be left blank.

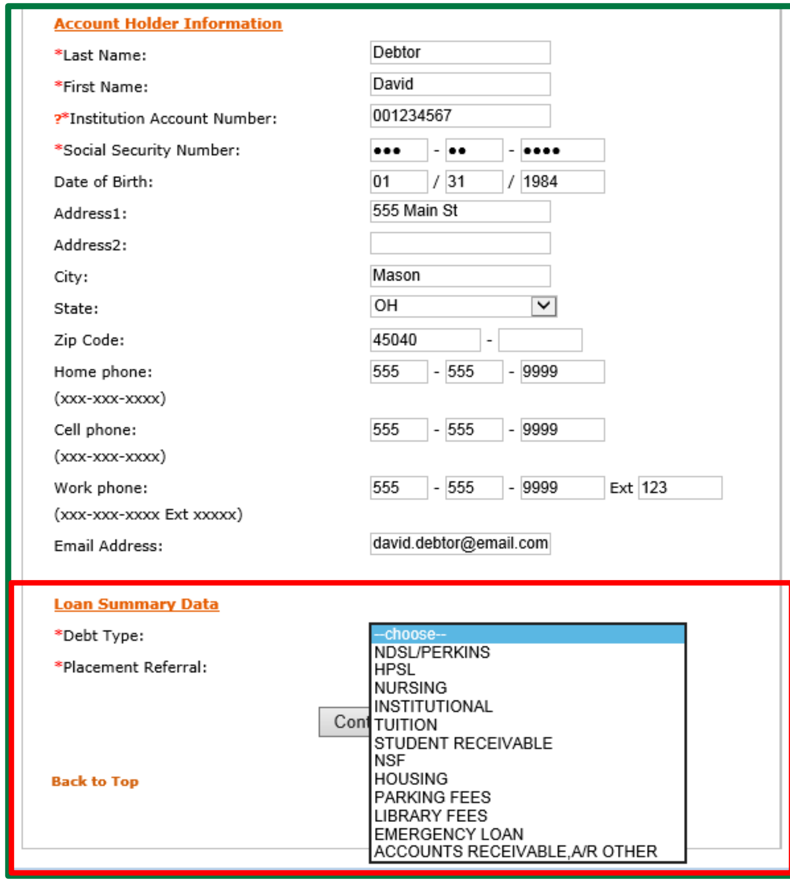
Single Entry Placement



These symbols indicate certain information about the corresponding fields.

Fields indicated with a “*” are required fields. Fields indicated with a “?” provide helpful tips on the corresponding field by hovering your mouse cursor over the “?.”

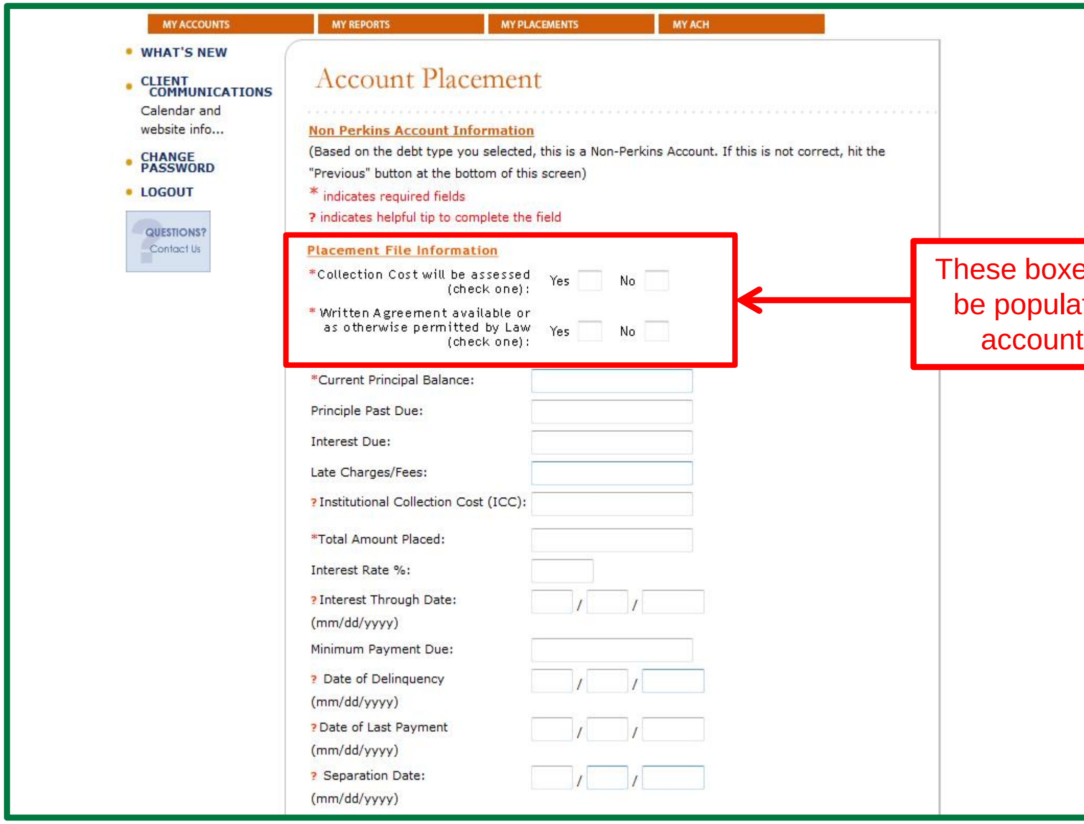
Single Entry Placement



Select the debt type and referral number here.

If you wish to place one account at a time, you can enter each consumer's account information into the appropriate fields. Please ensure you indicate the debt type and referral type (1st or 2nd Referral) so we are able to place the account correctly.

Single Entry Placement – Non Federal Accounts



These boxes will be required to be populated before a single account can be entered.

If you are placing accounts which are a Non-Federal debt type (Accounts/ Student Receivable, Tuition, Institutional, etc.), two questions must be answered regarding the assessment of collection costs before the account can be placed. If you answer “Yes” for the assessment of collection costs, a pop up message will appear.

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Popup Message for Collection Costs – Single Entry

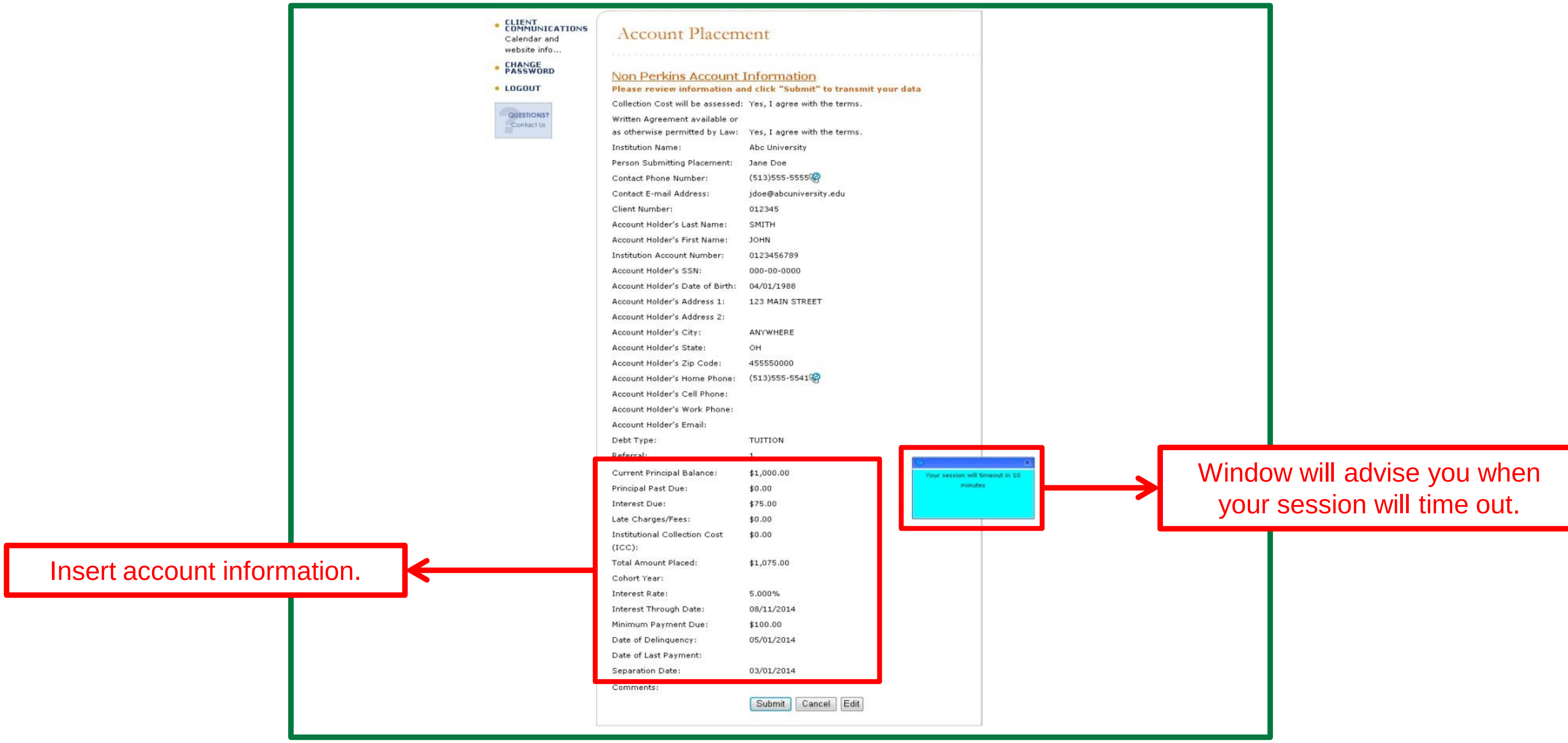
- If you answer “Yes” to assessing collection costs for the single entry account, the popup message will read as follows:
  - *On behalf of the INSTITUTION, please calculate and add applicable collection costs to accounts on an individual basis, as permitted by controlling law. These costs have been added or assessed after legal review by the INSTITUTION of the appropriateness of these charges as they relate to contractual and statutory law. The INSTITUTION, by adding the collection costs, confirms that: (i) there is a promissory note or written debt agreement with the debtor and it specifically identifies the amount of the collection costs to be added; and (ii) collection costs are appropriate and have been added in accordance with the written debt agreement and applicable law.*

- You must click a box stating “I agree” or “I do not agree.”
  - If you agree, then the popup message disappears and you must answer question #2 about having a written agreement.
  - If you answer “No” to assessing collection costs, no popup message will appear.

Popup Message for Written Agreement – Single Entry

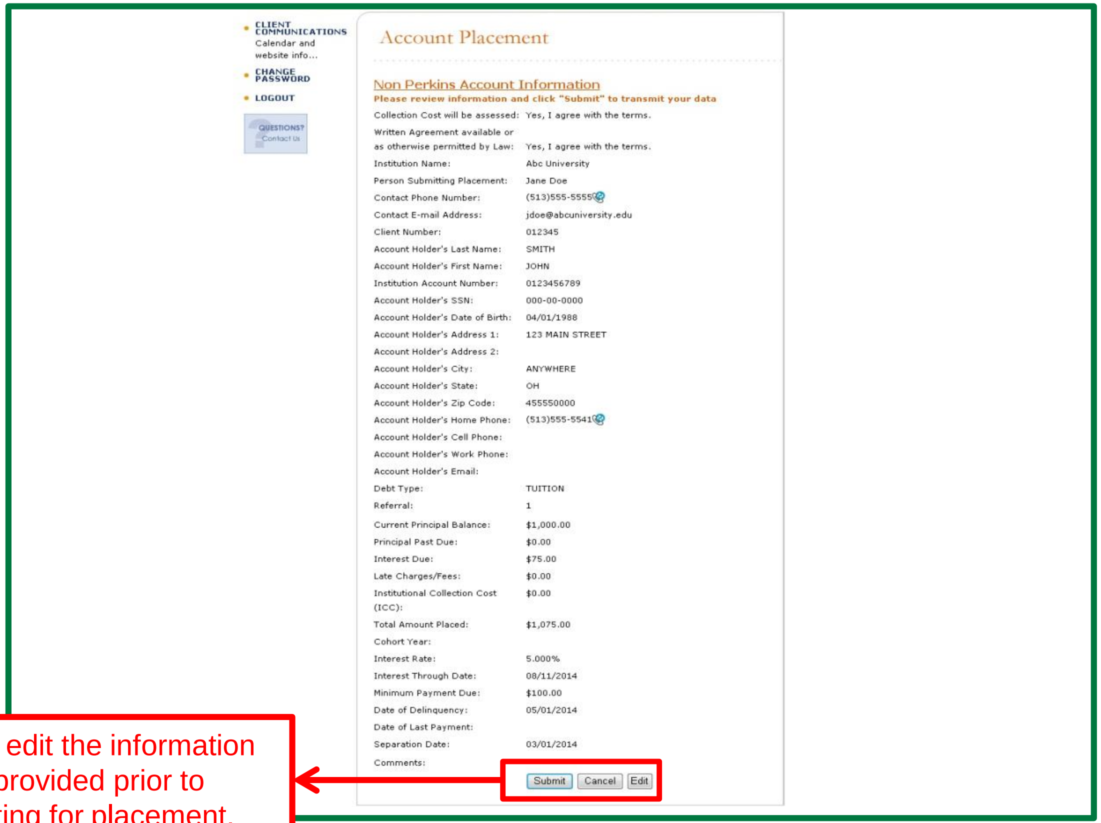
- If you answer “Yes” to having a written agreement available or as otherwise permitted by law for the single entry account, the popup message will read as follows:
  - *Collection costs must be determined by the provisions of the Promissory Note/written agreement (electronic or hard copy) that created the debt or as otherwise permitted by applicable state and/or federal law and regulations applicable to the type of debt being collected. Such provisions must be in place at the INSTITUTION before adding or assessing collection costs.*
- You must click a box stating “I agree” or “I do not agree.”
- If you answer “No” to having a written agreement available or as otherwise permitted by law while you answered the previous collection costs question as “Yes”, the popup message will read as follows:
  - *Collection costs must be determined by the provisions of the Promissory Note/written agreement (electronic or hard copy) that created the debt or as otherwise permitted by applicable state and/or federal law and regulations applicable to the type of debt being collected. Such provisions must be in place at the INSTITUTION before adding or assessing collection costs.*
- If you answer “I do not agree”, your Dedicated Client Services Representative will reach out to you in an effort to better understand how collection costs should be assessed on the accounts to be placed.

Single Entry Placements



Once you answer the questions and attestations, you may proceed with entering the account information. As you enter the data, a moving timer will count down from 30 minutes to ensure your non-public information is protected. If you reach the full 30 minutes and have not completed your entries for the singular account, you will automatically be logged out for security purposes.

Single Entry Placements


CLIENT COMMUNICATIONS
Calendar and website info...
CHANGE PASSWORD
LOGOUT
QUESTIONS? Contact Us

Account Placement

Non Perkins Account Information
Please review information and click "Submit" to transmit your data

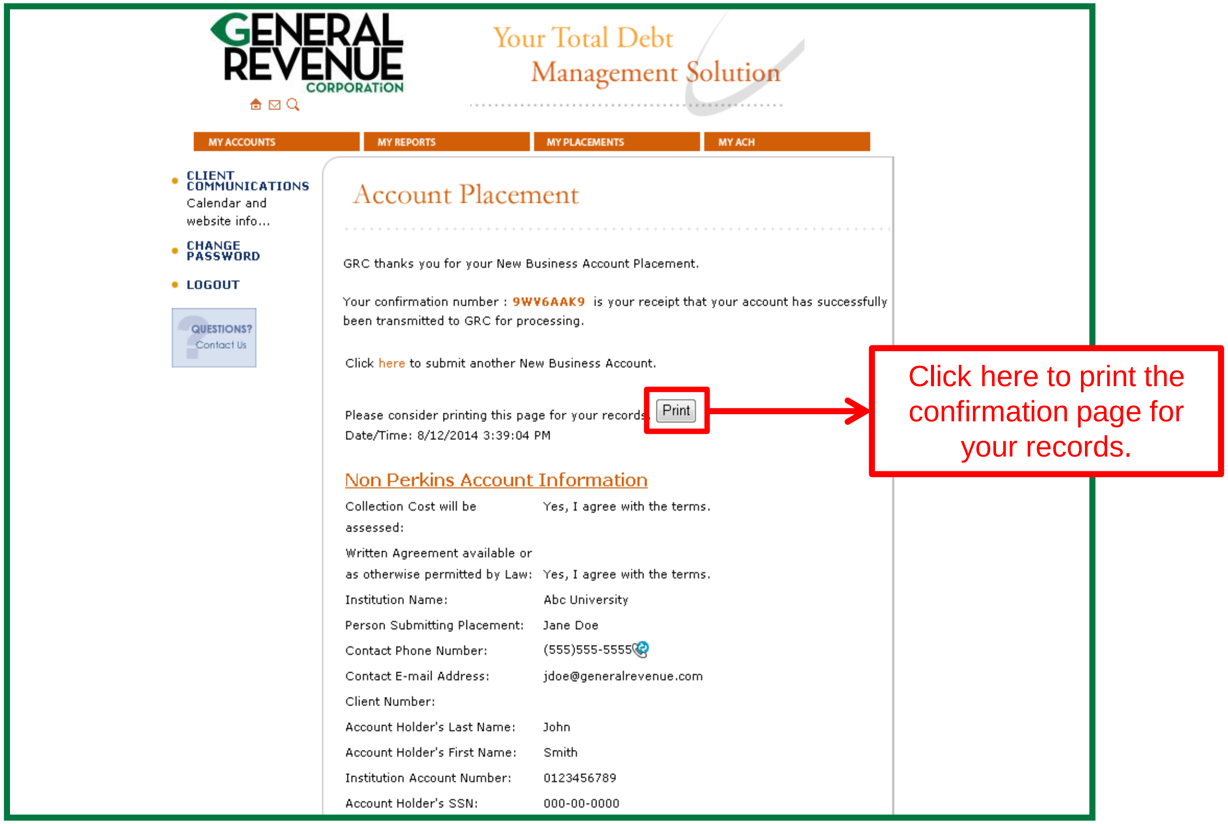
Collection Cost will be assessed:	Yes, I agree with the terms.
Written Agreement available or as otherwise permitted by Law:	Yes, I agree with the terms.
Institution Name:	Abc University
Person Submitting Placement:	Jane Doe
Contact Phone Number:	(513)555-5555
Contact E-mail Address:	jdoe@abcuniversity.edu
Client Number:	012345
Account Holder's Last Name:	SMITH
Account Holder's First Name:	JOHN
Institution Account Number:	0123456789
Account Holder's SSN:	000-00-0000
Account Holder's Date of Birth:	04/01/1988
Account Holder's Address 1:	123 MAIN STREET
Account Holder's Address 2:	
Account Holder's City:	ANYWHERE
Account Holder's State:	OH
Account Holder's Zip Code:	455550000
Account Holder's Home Phone:	(513)555-5541
Account Holder's Cell Phone:	
Account Holder's Work Phone:	
Account Holder's Email:	
Debt Type:	TUITION
Referral:	1
Current Principal Balance:	$1,000.00
Principal Past Due:	$0.00
Interest Due:	$75.00
Late Charges/Fees:	$0.00
Institutional Collection Cost (ICC):	$0.00
Total Amount Placed:	$1,075.00
Cohort Year:	
Interest Rate:	5.000%
Interest Through Date:	08/11/2014
Minimum Payment Due:	$100.00
Date of Delinquency:	05/01/2014
Date of Last Payment:	
Separation Date:	03/01/2014
Comments:	

Submit Cancel Edit

Ability to edit the information you provided prior to submitting for placement.

Before you submit your account for placement, you will have the opportunity to review the information you entered and edit if necessary. Once you've verified all of the information is correct, click "Submit".

Single Entry Placements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Your Total Debt Management Solution

MY ACCOUNTS | MY REPORTS | MY PLACEMENTS | MY ACH

- CLIENT COMMUNICATIONS
  Calendar and website info...
- CHANGE PASSWORD
- LOGOUT

QUESTIONS? Contact Us

Account Placement

GRC thanks you for your New Business Account Placement.

Your confirmation number : **9WV6AAK9** is your receipt that your account has successfully been transmitted to GRC for processing.

Click here to submit another New Business Account.

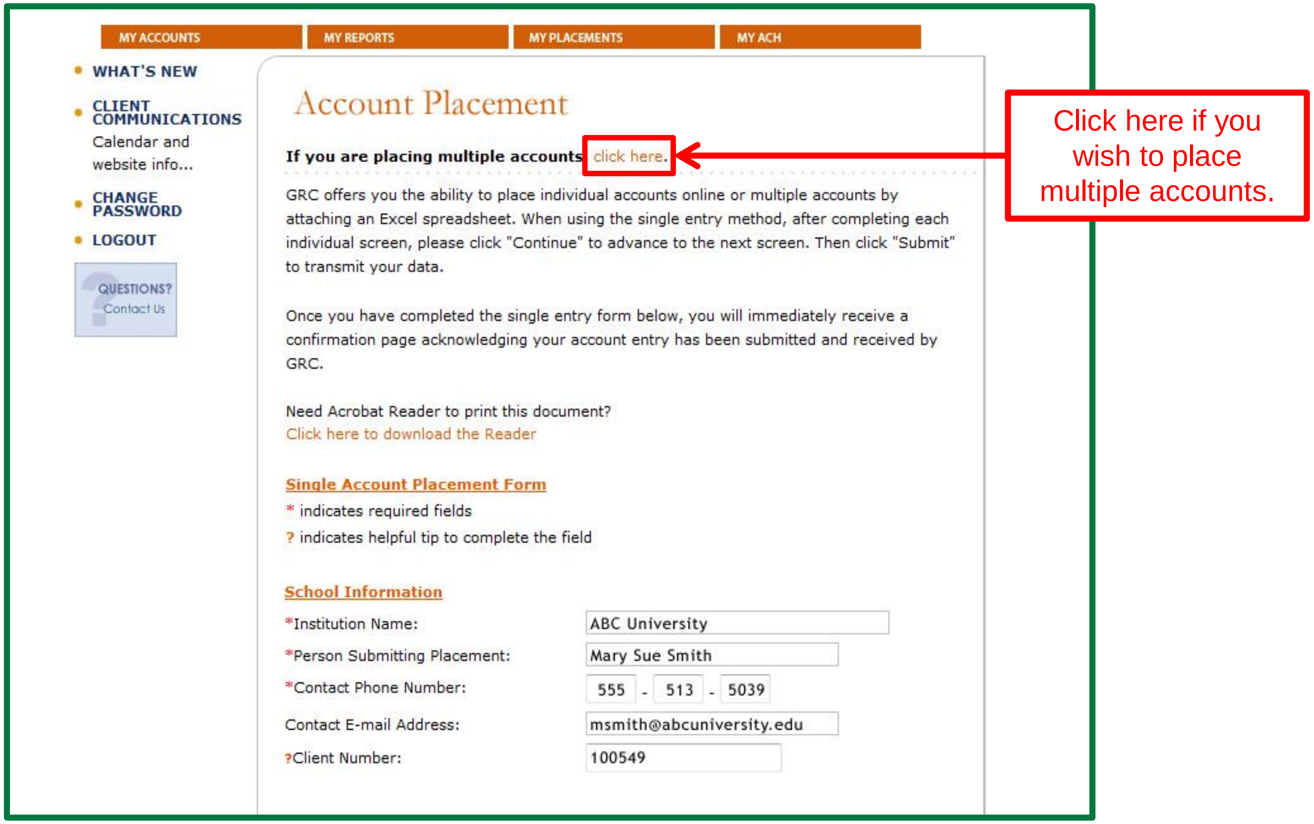
Please consider printing this page for your records. Print
Date/Time: 8/12/2014 3:39:04 PM

Non Perkins Account Information

Collection Cost will be assessed:	Yes, I agree with the terms.
Written Agreement available or as otherwise permitted by Law:	Yes, I agree with the terms.
Institution Name:	Abc University
Person Submitting Placement:	Jane Doe
Contact Phone Number:	(555)555-5555
Contact E-mail Address:	jdoe@generalrevenue.com
Client Number:	
Account Holder's Last Name:	John
Account Holder's First Name:	Smith
Institution Account Number:	0123456789
Account Holder's SSN:	000-00-0000

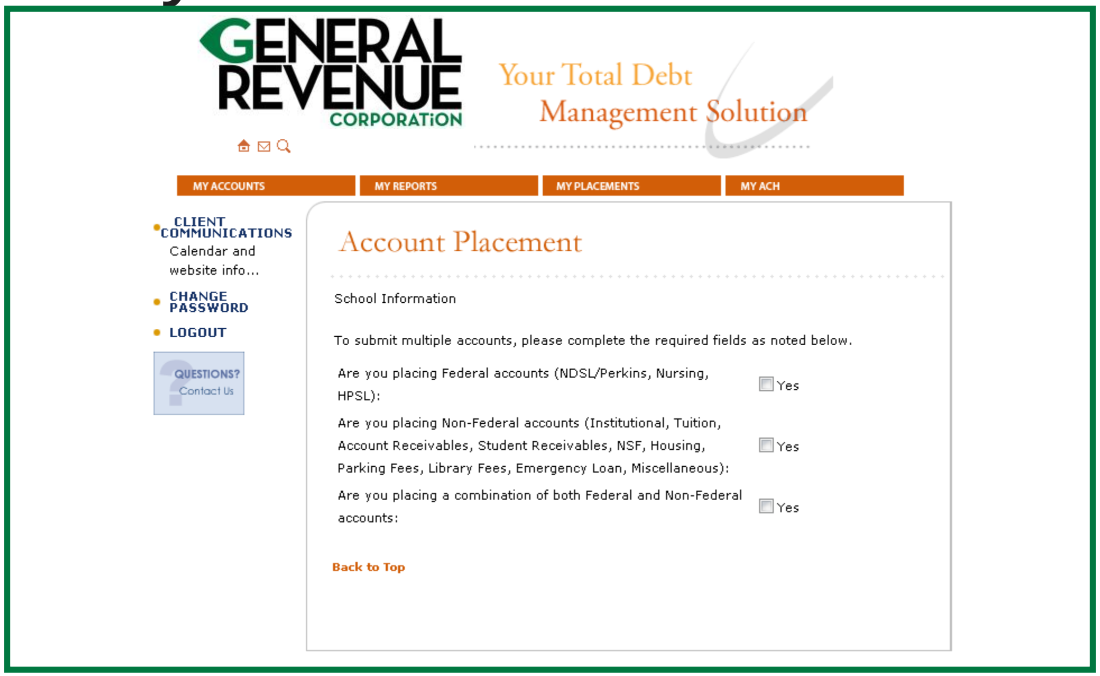
A Confirmation Page will appear to acknowledge the submission of your single account placement, which you also have the ability to print for your records.

Multiple Entry Placements



You are also able to place multiple accounts at once by going to the “My Placements” page and clicking the link on top of the page (as illustrated above). When selecting the multiple accounts functionality, you are able to upload an Excel spreadsheet which contains numerous accounts having the same parameters, i.e. debt type, referral, etc.

Multiple Entry Placements

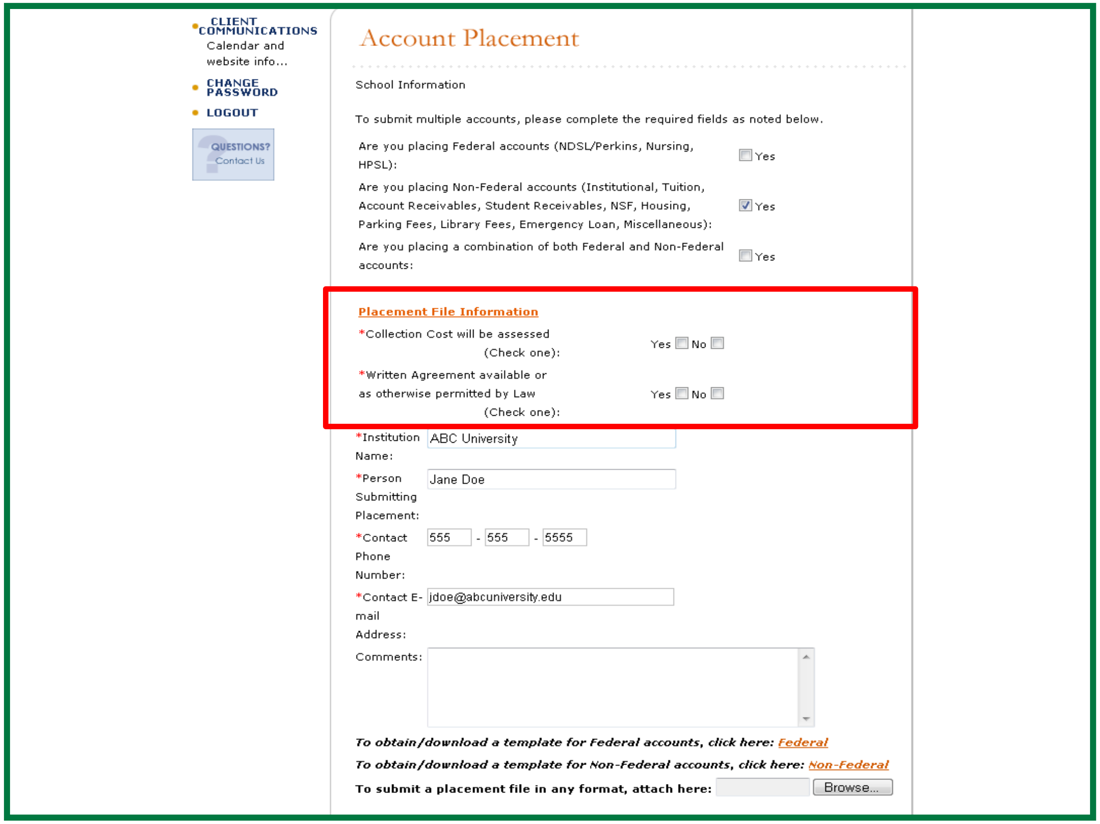


Each time you place accounts with us under the multiple entry window, you will be required to answer one of the three following questions:

- ❑ Are you placing Federal accounts (NDSL/Perkins, Nursing, HPSL)?
- ❑ Are you placing Non-Federal accounts (Institutional, Tuition, Account Receivables, Student Receivables, NSF, Housing, Parking Fees, Library Fees, Emergency Loan, Miscellaneous)?
- ❑ Are you placing a combination of both Federal and Non-Federal accounts?

- ➢ If you answer with a “Y” for Federal accounts, you will be able to continue uploading your file.
- ➢ If you answer with a “Y” for Non-Federal accounts, a pop-up message will appear as outlined on the next slide. These questions need to be answered to proceed with uploading your file.
- ➢ If you answer with a “Y” for a combination of both Federal and Non-Federal accounts, a pop-up message will appear as outlined on the next slide. These questions need to be answered to proceed with uploading your file.

Multiple Entry Placements



If you are placing accounts which are a Non-Federal debt type (Accounts/Student Receivable, Tuition, Institutional, etc.), two questions must be answered regarding the assessment of collection costs before the accounts can be placed. If you answer “Yes” for the assessment of collection costs, a pop up message will appear.

Popup Message for Collection Costs – Multiple Accounts

- If you answer “Yes” to assessing collection costs for the multiple entry of accounts, the popup message will read as follows:
  - *On behalf of the INSTITUTION, please calculate and add applicable collection costs to accounts on an individual basis, as permitted by controlling law. These costs have been added or assessed after legal review by the INSTITUTION of the appropriateness of these charges as they relate to contractual and statutory law. The INSTITUTION, by adding the collection costs, confirms that: (i) there is a promissory note or written debt agreement with the debtor and it specifically identifies the amount of the collection costs to be added; and (ii) collection costs are appropriate and have been added in accordance with the written debt agreement and applicable law.*

- You must click a box stating “I agree” or “I do not agree.”
  - If you agree, then the popup message disappears and you must answer question #2 about having a written agreement.
  - If you answer “No” to assessing collection costs, no popup message will appear.

Popup Message for Written Agreement – Multiple Accounts

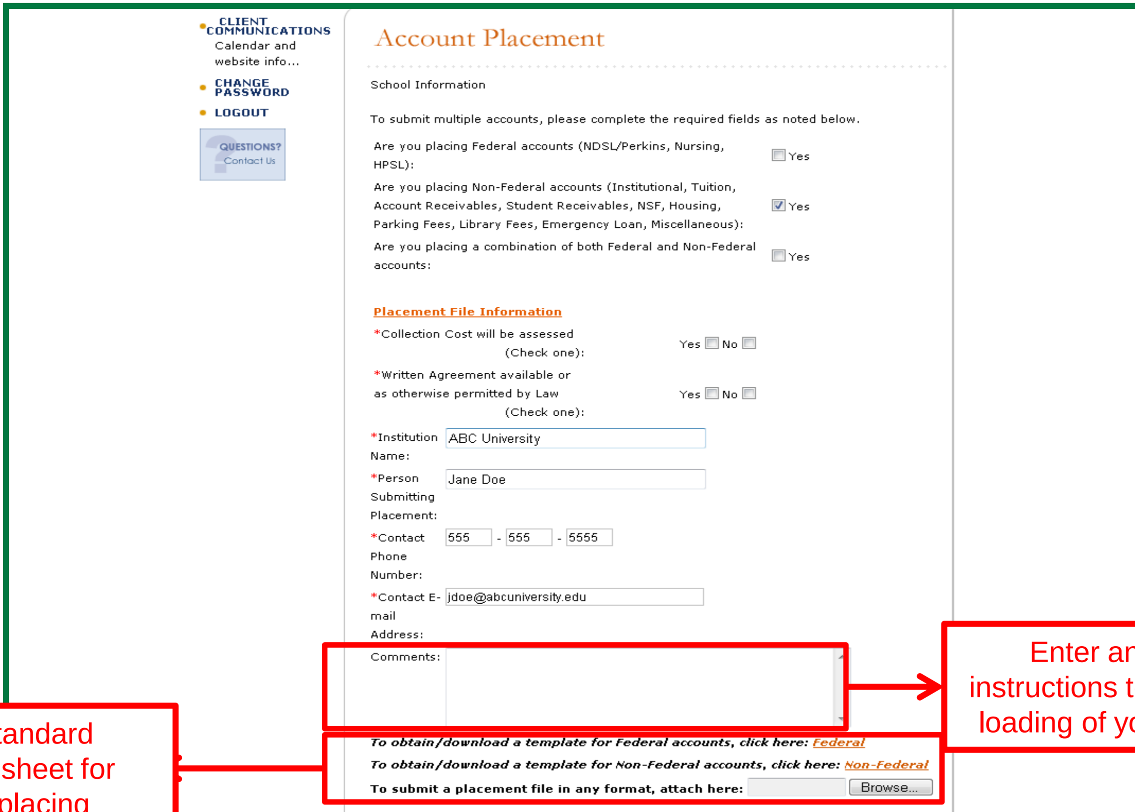
- If you answer “Yes” to having a written agreement available or as otherwise permitted by law for the multiple entry of accounts, the popup message will read as follows:
  - *Collection costs must be determined by the provisions of the Promissory Note/written agreement (electronic or hard copy) that created the debt or as otherwise permitted by applicable state and/or federal law and regulations applicable to the type of debt being collected. Such provisions must be in place at the INSTITUTION before adding or assessing collection costs.*

- You must click a box stating “I agree” or “I do not agree.”

- If you answer “No” to having a written agreement available or as otherwise permitted by law while you answered the previous collection costs question as “Yes”, the popup message will read as follows:
  - *Collection costs must be determined by the provisions of the Promissory Note/written agreement (electronic or hard copy) that created the debt or as otherwise permitted by applicable state and/or federal law and regulations applicable to the type of debt being collected. Such provisions must be in place at the INSTITUTION before adding or assessing collection costs.*

- If you answer “I do not agree”, your Dedicated Client Services Representative will reach out to you in an effort to better understand how collection costs should be assessed on the accounts to be placed.

Multiple Entry Placements



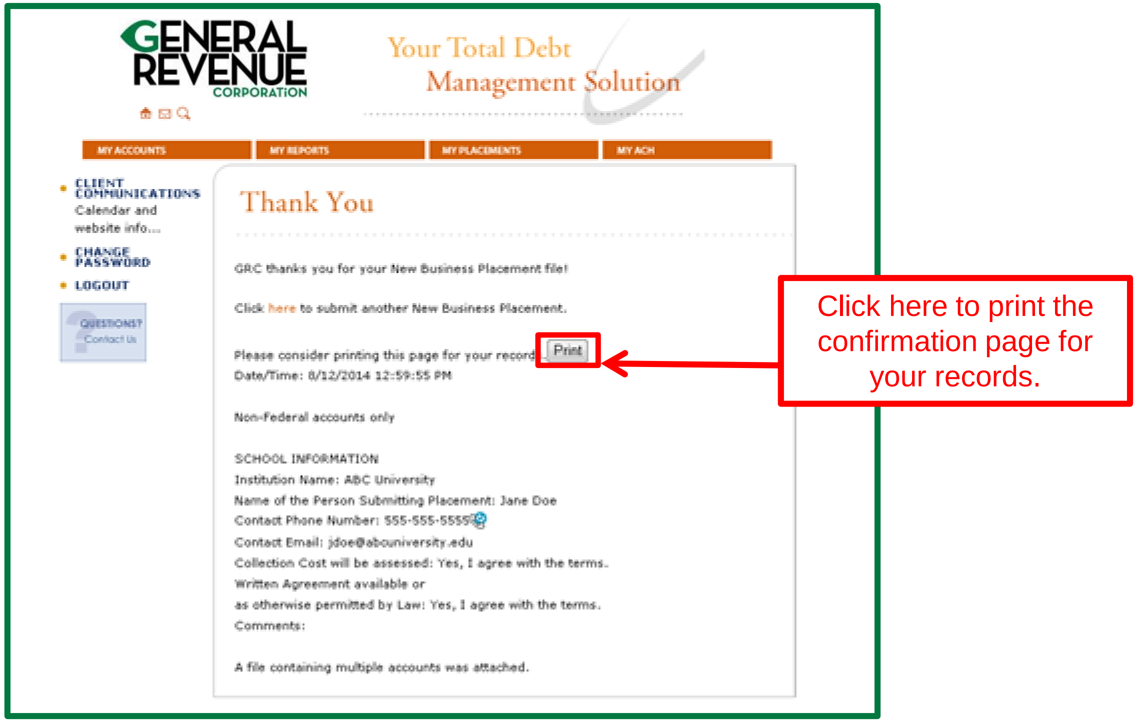
Enter any special instructions to facilitate the loading of your accounts.

Download our standard placement spreadsheet for convenience in placing accounts.

Enter your Institution Name and your contact information so we may make outreach to you if we have questions. Please enter any special instructions in the “Comments” box.

We also have standard Placement File Templates available for your convenience for both Federal and Non-Federal accounts, however you can upload your own Customized Placement File layout if you prefer.

Multiple Entry Placements



A Confirmation Page will appear to acknowledge the submission of your placement file, which you also have the ability to print for your records.

GRC Office Information

This concludes the GRC User Guide Presentation for the "My Placements" 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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