



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
© 2020 General Revenue Corporation. All rights reserved.



Confidential and proprietary information © 2020 General Revenue Corporation. All rights reserved.

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.

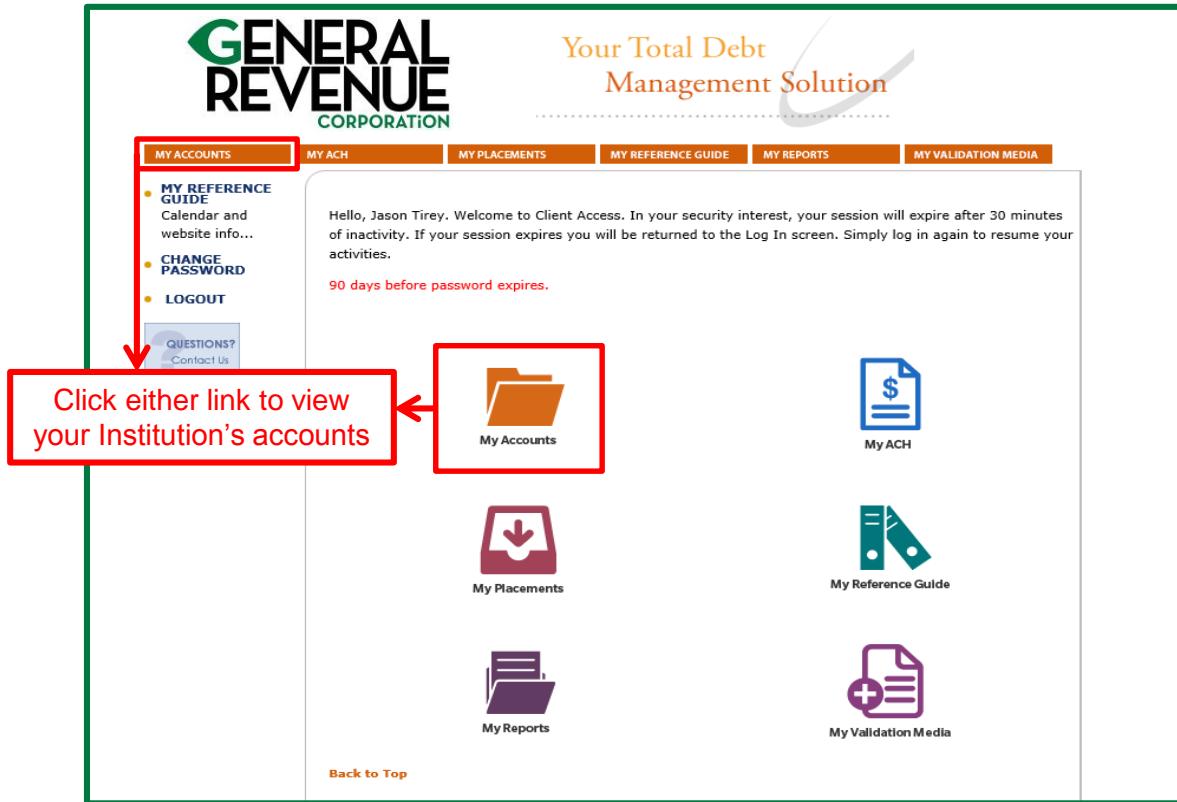
Features Covered Under “My Accounts” Section

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 screenshot shows the 'General Revenue CORPORATION' website. At the top right, it says 'Your Total Debt Management Solution'. Below the header are navigation links: MY ACCOUNTS, MY ACH, MY PLACEMENTS, MY REFERENCE GUIDE, MY REPORTS, and MY VALIDATION MEDIA. On the left, there's a sidebar with links for MY REFERENCE GUIDE (Calendar and website info...), CHANGE PASSWORD, MULTIPLE DIRECT PAYMENT, and LOGOUT. There's also a 'QUESTIONS? Contact Us' button. The main content area is titled 'Master List Search'. It contains instructions: '***SECURELY POST YOUR DIRECT PAYMENTS ONLINE - CONTINUE TO THE NEXT SCREEN FOR A SINGLE ENTRY PAYMENT OR CLICK TO THE LEFT TO USE THE MULTIPLE ENTRY SPREADSHEET***'. It explains how to search by first name, last name, SSN, or institution account number. A red box highlights the search fields ('Borrower First Name', 'Borrower Last Name', 'Borrower SSN', 'Institution Account #') and an arrow points from them to a red box containing the text 'Enter account information in one of the four fields'. A 'Search' button is at the bottom of the search form. A note at the bottom states: 'Some of the reports on the following pages contain several columns of information. Viewing those reports at less than 800 x 600 resolution may result in extensive wrapping of data fields or horizontal scrolling. Changing to a higher resolution will enable better viewability.'

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

The screenshot shows the GRC website interface. At the top, there is a navigation bar with links: MY ACCOUNTS, MY ACH, MY PLACEMENTS, MY REFERENCE GUIDE, MY REPORTS, and MY VALIDATION MEDIA. On the left, a sidebar includes links for MY REFERENCE GUIDE (Calendar and website info...), CHANGE PASSWORD, and LOGOUT, along with a 'QUESTIONS? Contact Us' button. The main content area is titled 'Master List Search Results'. It contains a note: '**SECURELY POST YOUR DIRECT PAYMENTS ONLINE - CONTINUE TO THE NEXT SCREEN**'. Below this, instructions say 'Please click on the Borrower SSN field to look up the account.' A table displays search results:

Borrower SSN	Borrower Name	Client Number	Debt Type	Account Status	Legal Status	Date Listed
***-**-0000	Baron, Jake	ABC001	Health Profession	Payment Promised Loan		04/01/19

Below the table, there are links: 'Back to Search Page', 'Contact my CSR', and 'Back to Top'. A red box highlights the 'Borrower SSN' column header, and another red box highlights the first row of the table. Red arrows point from these boxes to the following annotations:

- A red box on the left contains the text: 'Click here to view account details'.
- A red box on the right contains the text: '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

GENERAL REVENUE CORPORATION

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

Individual List

ON THE LEFT OF THE SCREEN, CLICK ON "DIRECT PAYMENT ENTRY" TO POST YOUR SINGLE ENTRY PAYMENT

Cohort Year	Debt Type	Institution Account#	Borrower SSN	Borrower Name	Account Status	Date Closed	Amount Due
	HEALTH PROFESSION LOAN	-81910N-1	***-***-0000	Baron, Jake	Payment Promised		\$887.50

[Back to Search Page](#)

[Printable View](#)

* We do not recommend using this information for completion of LVCs. This information is accurate as of the close of the prior business day. Contact your CSR for more detailed information.
** 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.

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

The screenshot shows the GRC website's Balance Detail page. The top navigation bar includes links for MY ACCOUNTS, MY ACH, MY PLACEMENTS, MY REFERENCE GUIDE, MY REPORTS, and MY VALIDATION MEDIA. On the left, a sidebar menu lists options like MY REFERENCE GUIDE, MASTER LIST, INDIVIDUAL LIST, and BALANCE DETAIL, with the latter being the active tab and highlighted by a red box. Below the sidebar is a 'QUESTIONS? Contact Us' link. The main content area is titled 'Balance Detail' and shows account details for 'Account 1 of 1*'. It includes fields for Institution Account #, Name, SSN, and Debt Type. A large red box highlights the detailed breakdown of charges, which includes:

Amount Placed:	\$1,287.50	Date Placed:	4/1/2019
Principal Balance:	\$725.40		
Principal Past Due:	\$725.40		
Interest Past Due:	\$0.00	Interest Rate:	0.00 %
Collection Costs:	\$162.10	Collection Cost Percentage:	30.01 %
Penalty Late Fee:	\$0.00		
Inst. Collection Cost:	\$0.00		
Total Past Due:	\$887.50		
Amount to Collect:	\$887.50		
Total Paid:	\$500.00		

A red arrow points from this highlighted section to a callout box containing the text: '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

The screenshot shows the GRC website interface. At the top left is the GRC logo with the text "GENERAL REVENUE CORPORATION". To its right is the slogan "Your Total Debt Management Solution". Below the logo is a navigation bar with links: MY ACCOUNTS, MY ACH, MY PLACEMENTS, MY REFERENCE GUIDE, MY REPORTS, and MY VALIDATION MEDIA. On the left, a sidebar menu lists various options: MY REFERENCE GUIDE, MASTER LIST, INDIVIDUAL LIST, BALANCE DETAIL, DEMOGRAPHIC INFORMATION (which is highlighted with a red box), PAYMENT ARRANGEMENTS, PAYMENT HISTORY, CONTACT SUMMARY, DIRECT PAYMENT ENTRY, CHANGE PASSWORD, and LOGOUT. At the bottom of the sidebar is a "QUESTIONS? Contact Us" button. The main content area is titled "Demographics Information". It displays the following personal data for a student borrower:

Name:	Baron, Jake	SSN:	***.***-0000
Address:	123 River Road	Status:	Good
City/State/Zip:	Vernon, NJ 07462		
Home Phone:		Status:	
Work Phone:		Status:	
Responsible Party Phone:		Status:	
Place Of Employment:			
Contact Status:	OK to Contact		
Cosigner:	None		

Below this information are several notes and links:

- [Back to Search Page](#)
- * If there is a cosigner listed above it means at least one of the accounts has a cosigner, but they may not be listed on all accounts for this borrower.
- ** 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](#)

A red box highlights the "DEMOGRAPHIC INFORMATION" link in the sidebar, and a red arrow points from this box to a red-bordered callout box containing the text: "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

The screenshot shows the GRC website interface. At the top left is the GRC logo with the text "GENERAL REVENUE CORPORATION". To its right is the tagline "Your Total Debt Management Solution". Below the logo is a navigation bar with links: MY ACCOUNTS, MY ACH, MY PLACEMENTS, MY REFERENCE GUIDE, MY REPORTS, and MY VALIDATION MEDIA. On the far left is a sidebar with a list of links: MY REFERENCE GUIDE, MASTER LIST, INDIVIDUAL LIST, BALANCE DETAIL, DEMOGRAPHIC INFORMATION, PAYMENT ARRANGEMENTS (which is highlighted with a red box), PAYMENT HISTORY, CONTACT SUMMARY, DIRECT PAYMENT ENTRY, CHANGE PASSWORD, and LOGOUT. At the bottom of the sidebar is a "QUESTIONS? Contact Us" button with a question mark icon. The main content area is titled "Payment Arrangements". It contains a message: "These payment arrangements are reflective of all loans placed with GRC for this borrower. There may be other loans on GRC's system for other clients." Below this is a table with the following data:

NAME:	Baron, Jake	SSN:	***-**-0000
Scheduled Amount:	\$500.00		
Current Due Date:	5/12/2019		
Amount Last Paid:	\$500.00		
Date Last Paid:	4/26/2019		
Total Paid	\$500.00		

Below the table are links: "Back to Search Page" and "Printable View". A note at the bottom states: "We do not recommend using this information for completion of LVCs. This information is accurate as of the close of the prior business day. Contact your CSR for more detailed information." Another note says: "The accounts shown are for your institution only. There may be other loans for this borrower on GRC's system for other clients." A final note at the bottom encourages users to contact their Client Services Representative or call 1-800-234-1472.

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

Your Total Debt Management Solution

Payment History

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

Click [here](#) to view Payment Code definitions.

NAME:		SSN:							
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

The screenshot shows the 'Contact Summary' page of the General Revenue Corporation website. The top navigation bar includes links for 'MY ACCOUNTS', 'MY ACH', 'MY PLACEMENTS', 'MY REFERENCE GUIDE', 'MY REPORTS', and 'MY VALIDATION MEDIA'. On the left, a sidebar menu lists options like 'MY REFERENCE GUIDE', 'MASTER LIST', 'INDIVIDUAL LIST', 'BALANCE DETAIL', 'DEMOGRAPHIC INFORMATION', 'PAYMENT ARRANGEMENTS', 'PAYMENT HISTORY', and 'CONTACT SUMMARY' (which is highlighted with a red box). Below the sidebar is a 'QUESTIONS? Contact Us' button. The main content area features the title 'Contact Summary' and two links: 'Click here to view the System Notes' and 'Click here to view the Collector Abbreviations'. It displays account details: Name: Baron, Jake, SSN: ***-**-0000, Contact Status: OK to Contact, and Account Status: Payment Promised. A note states: 'This information shows the previous contacts made with the borrower, cosigner or spouse.' Below this is a list of system-generated notes. At the bottom, there's a 'Add A Note *' button, a 'Contact Summary Information' section with a table, and buttons for 'Back to Search Page' and 'Printable View'. A red box highlights the 'CONTACT SUMMARY' link in the sidebar, and another red box highlights the table in the 'Contact Summary Information' section. An annotation with a red arrow points from the right side towards the table, stating: 'Account displays summary of collection activities for calls, contacts and letters sent'.

Total Calls Made to the Account Holder	Total Contacts Made to the Account Holder	Letters Sent on the Account
10	6	2

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

GENERAL REVENUE CORPORATION

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 **(Red Box)**

• CHANGE PASSWORD

• LOGOUT

QUESTIONS? Contact Us

Direct Payment Entry

If you are submitting multiple payments with an Excel file, [click here](#)

Client Name: ABC University
Client Number: 001234
Borrower Name: Debtor, Daisy P
Borrower SSN: ***-**-8860
Payment Type: Direct Payment
* Payment SubType: **Please select one...** **(Red Box)** **(Callout: Allows you to select the type of payment being reported)**
Is this a PIF or SIF: PIF SIF Others
Comments:
Submit | Clear All

Due to additional costs incurred on "Legal Accounts", payments cannot be posted on this screen. For more information, please contact our Legal Department.

Some examples of incremental costs for "Legal Accounts" include court costs, attorney fees and filing fees. Should a student have multiple accounts, a portion of the direct payment will be applied to all accounts, unless otherwise specified.

The Effective Date is the close of next business day.

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

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

GENERAL REVENUE CORPORATION