



# Debt Manager Portal

Client Navigation Guide

# Training Contents

1

## Navigation

Home screen of the Debt Manager Fit Portal & where to find information

2

## Reports

View scheduled reports and see generated ad-hoc reports

3

## Debtor/Account Search

Find a specific account to view documents

4

## Documents

View or upload documents associated with an account

# 1

# Debt Manager FitPortal Home Page

Debt Manager FitPortal™ Search 

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### Messages

The AGO Office will be closed Tuesday, July 4, 2023 in observance of Independence Day.

[View Reports](#)

ALL ▼

[Reports](#)

[Financials](#)

### Generate Reports

Creditor\_Receiver\_Inventory\_Report ▼

Account Placement Date >=        Account Placement Date <=  

Forward Date >=        Forward Placement Date <=  

[Generate Report](#)



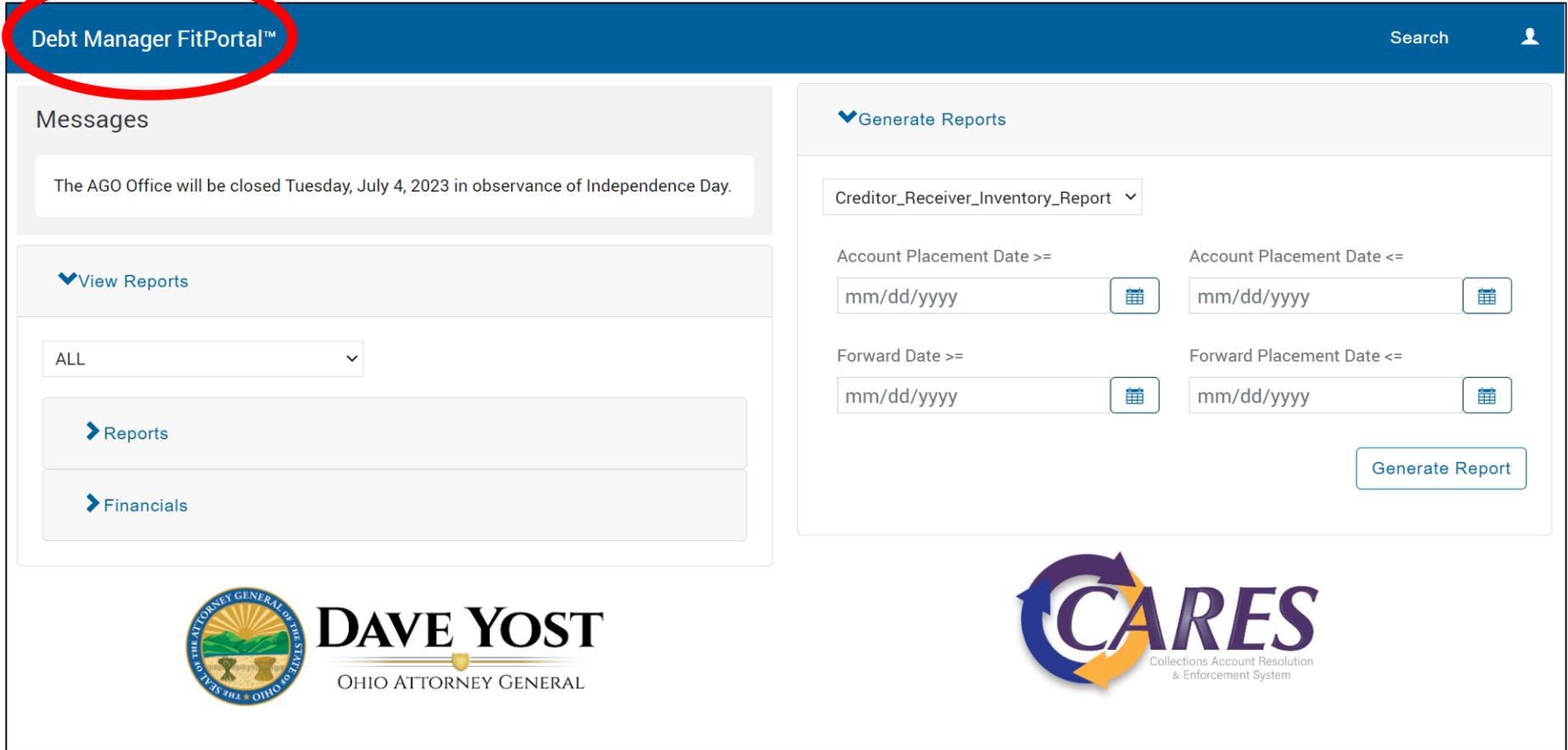
**DAVE YOST**  
OHIO ATTORNEY GENERAL



**CARES**  
Collections Account Resolution  
& Enforcement System



# Debt Manager FitPortal Home Page



Debt Manager FitPortal™

Search

Messages

The AGO Office will be closed Tuesday, July 4, 2023 in observance of Independence Day.

View Reports

ALL

Reports

Financials

Generate Reports

Creditor\_Receiver\_Inventory\_Report

Account Placement Date >=

mm/dd/yyyy

Account Placement Date <=

mm/dd/yyyy

Forward Date >=

mm/dd/yyyy

Forward Placement Date <=

mm/dd/yyyy

Generate Report

 **DAVE YOST**  
OHIO ATTORNEY GENERAL

 **CARES**  
Collections Account Resolution  
& Enforcement System

- The Debt Manager FitPortal™ text can be clicked from anywhere in the portal to navigate back to this home page



# Messages

The screenshot displays the Debt Manager FitPortal™ interface. At the top, there is a blue header with the text "Debt Manager FitPortal™" on the left and "Search" and a user icon on the right. Below the header, the main content area is divided into several sections. On the left, there is a "Messages" section highlighted with a red border, containing a message: "The AGO Office will be closed Tuesday, July 4, 2023 in observance of Independence Day." Below this, there is a "View Reports" section with a dropdown menu set to "ALL" and two buttons: "Reports" and "Financials". On the right, there is a "Generate Reports" section with a dropdown menu set to "Creditor\_Receiver\_Inventory\_Report". Below this, there are four date selection fields: "Account Placement Date >=", "Account Placement Date <=", "Forward Date >=", and "Forward Placement Date <=", each with a calendar icon. A "Generate Report" button is located at the bottom right of this section. At the bottom of the page, there are two logos: the Ohio Attorney General's logo for Dave Yost and the CARES logo (Collections Account Resolution & Enforcement System).

- Custom AGO Messages display in the top-left banner.



# Reports

The screenshot displays the 'Debt Manager FitPortal™' interface. At the top, there is a blue header with the text 'Debt Manager FitPortal™' on the left and 'Search' and a user icon on the right. Below the header, the page is divided into several sections. On the left, there is a 'Messages' section with a message: 'The AGO Office will be closed Tuesday, July 4, 2023 in observance of Independence Day.' Below this is a 'View Reports' section, which is highlighted with a red border. This section contains a dropdown menu set to 'ALL', and two buttons: 'Reports' and 'Financials'. To the right of the 'View Reports' section is a 'Generate Reports' section. It features a dropdown menu set to 'Creditor\_Receiver\_Inventory\_Report'. Below this are four date selection fields: 'Account Placement Date >=' and 'Account Placement Date <=' (both set to 'mm/dd/yyyy'), and 'Forward Date >=' and 'Forward Placement Date <=' (both set to 'mm/dd/yyyy'). Each date field has a calendar icon. At the bottom right of the 'Generate Reports' section is a 'Generate Report' button. At the bottom of the page, there are two logos: the Ohio Attorney General's logo for Dave Yost and the CARES logo (Collections Account Resolution & Enforcement System).

- The View Reports section will provide reports that your user role has been scheduled to receive on a recurring basis and those which are generated ad-hoc.



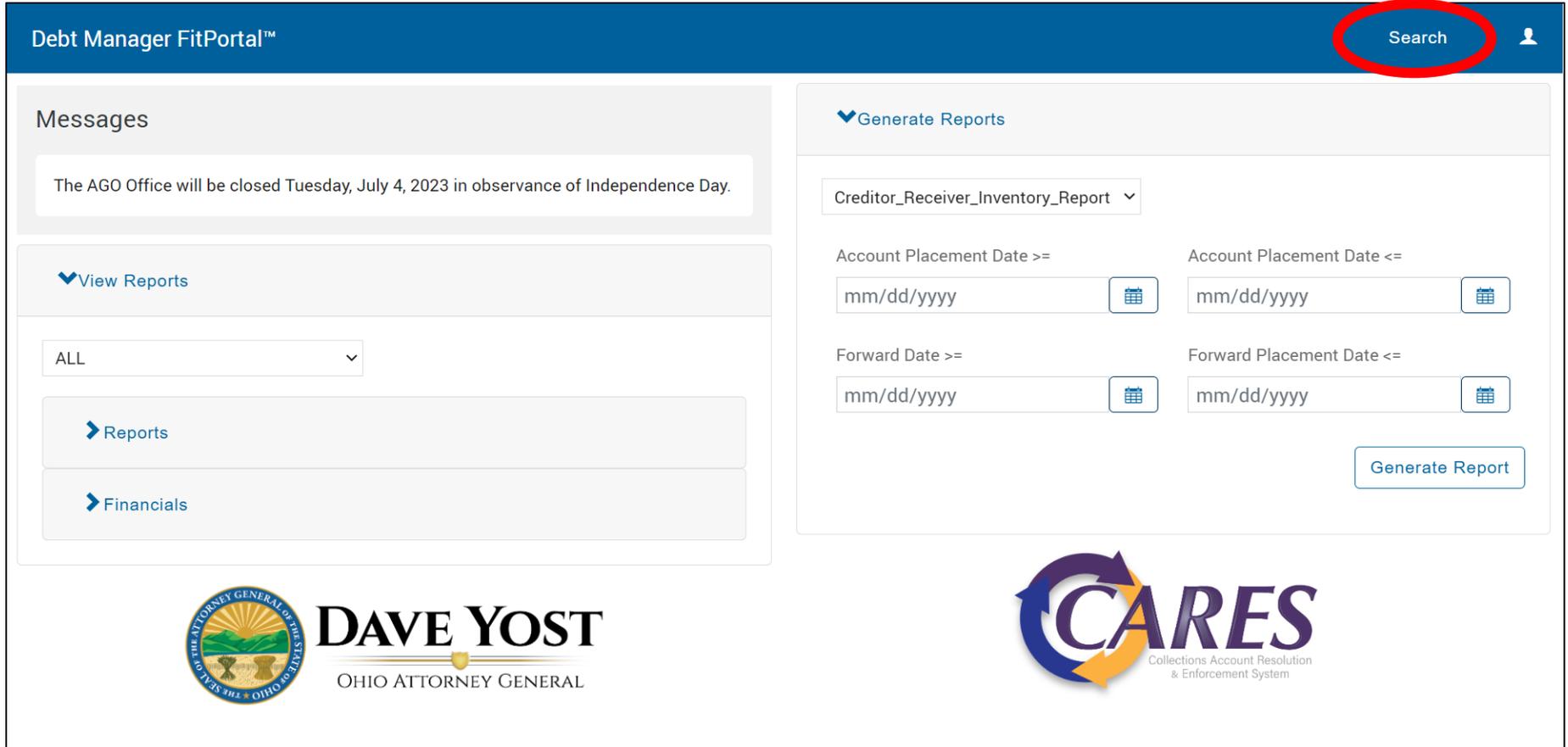
# Generate Reports

The screenshot displays the Debt Manager FitPortal™ interface. The top navigation bar includes the portal name and a search icon. A messages section contains a notice about the AGO Office closure on July 4, 2023. The main content area is divided into two sections: 'View Reports' on the left and 'Generate Reports' on the right. The 'Generate Reports' section is highlighted with a red border and contains a dropdown menu for report types (currently set to 'Creditor\_Receiver\_Inventory\_Report'), four date selection fields for 'Account Placement Date' and 'Forward Date' with range operators (>= and <=), and a 'Generate Report' button. The footer features the logos for Dave Yost, Ohio Attorney General, and the CARES (Collections Account Resolution & Enforcement System) logo.

- The Generate Reports section allows you to generate reports as needed with the criteria you select.
- Generated reports will populate in the View Reports section.



# Search



Debt Manager FitPortal™

Search

Messages

The AGO Office will be closed Tuesday, July 4, 2023 in observance of Independence Day.

View Reports

ALL

Reports

Financials

Generate Reports

Creditor\_Receiver\_Inventory\_Report

Account Placement Date >=

mm/dd/yyyy

Account Placement Date <=

mm/dd/yyyy

Forward Date >=

mm/dd/yyyy

Forward Placement Date <=

mm/dd/yyyy

Generate Report

 **DAVE YOST**  
OHIO ATTORNEY GENERAL

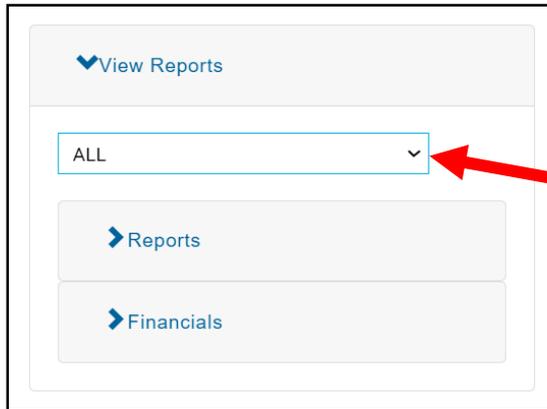
 **CARES**  
Collections Account Resolution  
& Enforcement System

- Open details for a debtor or account using the available Search fields.



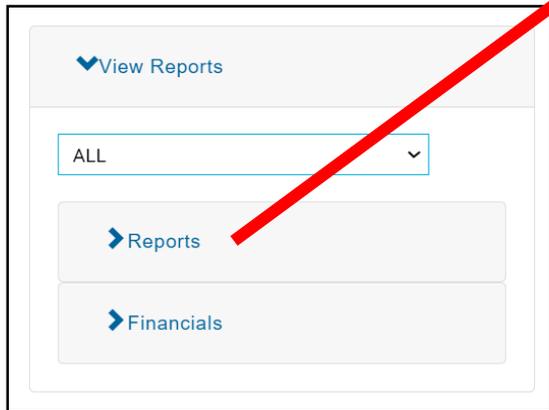
# 2

## View Reports

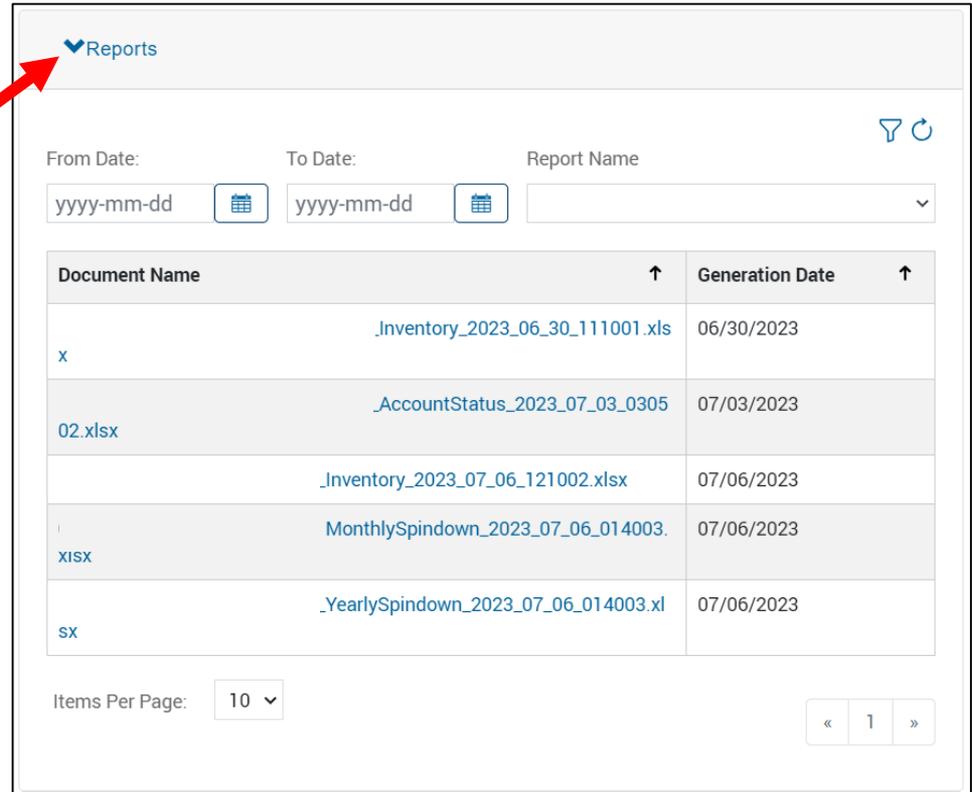


If your user role has access to multiple Creditor short names, they will be selectable from this drop-down. The default is to display reports associated with 'ALL' short names.

# View Reports



Thumbnail of the 'View Reports' page. It shows a header with 'View Reports', a dropdown menu set to 'ALL', and two buttons: 'Reports' and 'Financials'. A red arrow points from the 'Reports' button in this thumbnail to the 'Reports' link in the main screenshot.



Main screenshot of the 'View Reports' page. The page has a header with a 'Reports' link. Below the header are filters for 'From Date' and 'To Date' (both set to 'yyyy-mm-dd' with calendar icons) and a 'Report Name' dropdown. A table lists reports with columns for 'Document Name' and 'Generation Date'. At the bottom, there is an 'Items Per Page' dropdown set to '10' and a pagination control showing page '1'.

Document Name	Generation Date
<a href="#">.Inventory_2023_06_30_111001.xls</a>	06/30/2023
<a href="#">_AccountStatus_2023_07_03_030502.xlsx</a>	07/03/2023
<a href="#">.Inventory_2023_07_06_121002.xlsx</a>	07/06/2023
<a href="#">MonthlySpindown_2023_07_06_014003.xlsx</a>	07/06/2023
<a href="#">.YearlySpindown_2023_07_06_014003.xlsx</a>	07/06/2023

# View Reports

▼ Reports

From Date:  To Date:  Report Name:

Document Name	↑	Generation Date	↑
<a href="#">.Inventory_2023_06_30_111001.xls</a>		06/30/2023	
<a href="#">.AccountStatus_2023_07_03_030502.xlsx</a>		07/03/2023	
<a href="#">.Inventory_2023_07_06_121002.xlsx</a>		07/06/2023	
<a href="#">MonthlySpindown_2023_07_06_014003.xlsx</a>		07/06/2023	
<a href="#">.YearlySpindown_2023_07_06_014003.xlsx</a>		07/06/2023	

Items Per Page:

« 1 »

- Default filters are null date ranges and blank report type – everything available displays.
- Default date sort is ascending, click the arrow to change the sort to display the most recent reports first.
- Seven report types will display here, whether scheduled or ran ad-hoc:  
Creditor/Receiver Inventory, Yearly Spindown, Account Status, Account Tag Summary, History Analysis, Monthly Spindown, Paid in Full

# View Financials

View Reports

ALL

Reports

Financials

Financials

From Date: To Date: Report Name

yyyy-mm-dd yyyy-mm-dd

Document Name	Generation Date
8155_2023_06_29.pdf	06/29/2023
8156_2023_06_29.pdf	06/29/2023
8157_2023_06_29.pdf	06/29/2023
8401_2023_06_30.pdf	06/30/2023

Items Per Page: 10

« 1 »

# 3

# Debtor/Account Search

Debt Manager FitPortal™

**Search**

Messages

The AGO Office will be closed Tuesday, July 4, 2023 in observance of Independence Day

View Reports

ALL

Reports

Financials

Generate Reports

Financial\_Breakdown\_Report

Debtor Number

First name

Last name

Business name

Commercial contact name

Phone

SSN/EIN

Address Line 1

ZIP

Account number

Debtor number

Creditor Reference

Creditor Ext. Ref. Id

Legacy

Debtor Legacy Id

Creditor Account Legacy Id

Reset

Cancel Search



**DAVE YOST**  
OHIO ATTORNEY GENERAL

# Debtor/Account Search

First name	<input type="text"/>
Last name	<input type="text"/>
Business name	<input type="text"/>
Commercial contact name	<input type="text"/>
Phone	<input type="text"/>
SSN/EIN	<input type="text"/>
Address Line 1	<input type="text"/>
ZIP	<input type="text"/>
<hr/>	
Account number	<input type="text" value="DM-assigned account number"/>
Debtor number	<input type="text" value="DM-assigned debtor number"/>
Creditor Reference	<input type="text" value="CRN – assigned by Creditor"/>
Creditor External Account Number	<input type="text" value="DRL – assigned by Creditor"/>
<hr/>	
<b>Legacy</b>	
Debtor Legacy Id	<input type="text" value="CUBS lead packet number"/>
Creditor Account Legacy Id	<input type="text" value="CUBS account number"/>
<hr/>	
<a href="#">Reset</a>	
<hr/>	
<input type="button" value="Cancel"/> <input type="button" value="Search"/>	



# 4

## Viewing Documents

Debt Manager FitPortal™ Search

Documents

Debtor 1001206: FNAME1473 TRAINING146 | Account 1001085 | Creditor Reference: CRN00949 | Creditor External Account #: DRL00952

**▼ Documents**

Select Document Class:  From Date:  To Date:

	Document Name ↑	Document Class ↑	UserName ↑	Generation Date ↑
	<a href="#">RcvrRc_IB_20230301010028.csv</a>	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
	<a href="#">SAGE_20220321_1503.csv</a>	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
	<a href="#">RcvrRc_IB_20230301010028.csv</a>	CE House Bill 390	TPRTL.AGO.SC_Man	06/01/2023
	<a href="#">RcvrRc_IB_202301310100708.csv</a>	CE House Bill 390	TPRTL.AGO.SC_Man	06/15/2023

Items Per Page:

« 1 »

- Click on the document name to download the file

# Uploading Documents

Debt Manager FitPortal™ Search 

>  Documents

Debtor 1001206: FNAME1473 TRAINING146 | Account 1001085 | Creditor Reference: CRN00949 | Creditor External Account #: DRL00952

▼ Documents

Select Document Class:  From Date:  To Date:    



	Document Name ↑	Document Class ↑	UserName ↑	Generation Date ↑
	RcvrRcl_IB_ 20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
	SAGE_20220321_1503.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
	RcvrRcl_IB_ 20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/01/2023
	RcvrRcl_IB_ .202301310100708.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/15/2023

Items Per Page:

« 1 »

- Click on the plus sign symbol to upload a new document
- Accepted file types: PDF, JPG, TIFF, PNG, CSV
- Accepted characters in file name: hyphens, underscores, periods

# Uploading Documents

Debt Manager FitPortal™ Search

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**Documents**

Debtor 1001206: FNAME1473 TRAINING146 | Account 1001085 | Creditor Reference: CRN00949 | Creditor External Account #: DRL00952

**Documents**

Select Document Class: All | From Date: yyyy-mm-dd | To Date: yyyy-mm-dd

	Document Name ↑	Document Class ↑	UserName ↑	Generation Date ↑
	RcvRcl_IB_20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
	SAGE_20220321_1503.csv	CE House Bill 390	TPRTL.AGO.SC_Man	05/24/2023
	RcvRcl_IB_20230301010028.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/01/2023
	RcvRcl_IB_202301310100708.csv	CE House Bill 390	TPRTL.AGO.SC_Man	06/15/2023

Items Per Page: 10

« 1 »



The debtor and account displayed in the banner will be associated with the uploaded document. Be sure to search for the correct account before uploading any documents.