# UHG I LLC
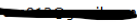
## Portal Access and Administrator ID

UHG will initiate Portal Access and set up Administrative Contacts. There is a 2-step authentication process when setting up new users. Once the Administrative Contacts are setup, Servicer can then setup additional users as they need them. Administrators can reset passwords and re-certify additional users in DebtNext. Re-Certification occurs every 90 days for all users.

- User will receive an email invitation for DebtNext, select link to setup the user
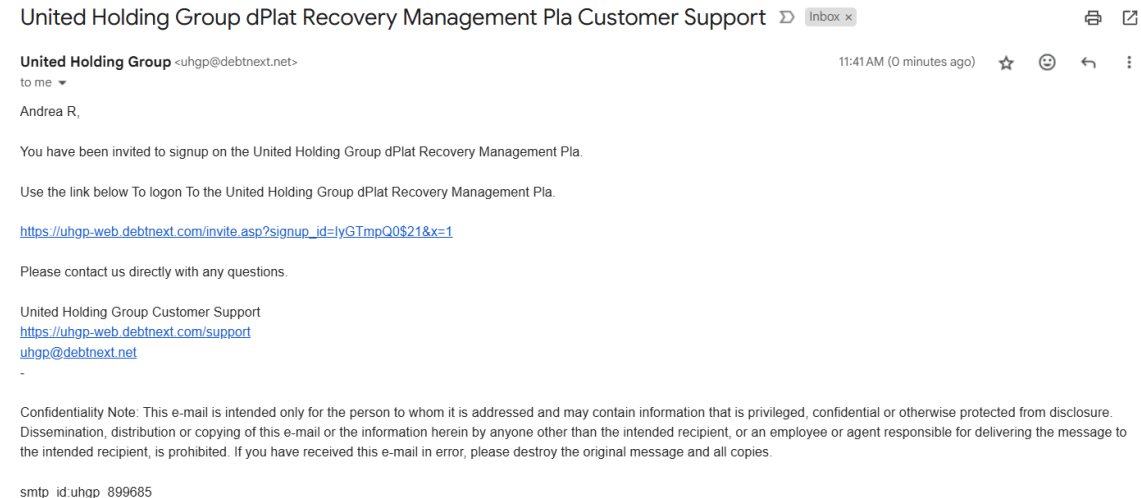


- Once the link is selected it will route you to a DN Screen to confirm your Name, Company and Email. Select 'Confirm'

**UHG I LLC**

- Contact Profile: Select Edit in upper right corner

| Contact Profile | |
|---|---|
| Use the form below to update Contact details | |

| Contact Detail | | | | (edit) |
|---|---|---|---|---|
| **Primary** | | **Web Portal Details** | | |
| **Company:** | Test Agency | **Enabled:** | Yes *Indicates if this Contact will be permitted to authenticate to the Web Portal.* | |
| **Name:** | Andrea R | | | |
| **Platform Configuration** | | **Username:** | - | |
| **Active:** | Yes *Indicates if this Contact is active and available for selection and Web Portal access.* | **Contact Rights Template:** | 116 | Servicer Administrator | |
| | | **Primary Purpose:** | g | General Purpose | |
| **Email Notification:** | Yes *Indicates if this Contact will receive email notifications.* | **Authentication** | | |
| | | **Method:** | Standard | |
| **Contact Information** | | **Password:** (?) | *********** | |
| Phone | Extension: | | **Confirm Password:** | - |

- Enter Password and validate that your UserName is at least 6 characters long, select 'Submit'. Registration Status under Reviewed will reflect Pending, UHG Staff will 'Set as Reviewed' to finalize the authorization steps. User will then be able to login.

| Authentication | |
|---|---|
| **Method:** | Standard |
| **Password:** (?) | *********** |
| **Confirm Password:** | - |
| **Secondary Companies:** | 0 |
| **Registration Status** | |
| **Registered:** | 2/11/2025 12:52:05 PM *Indicates if this Contact has completed the Contact registration. Access will not be granted to the Web Portal until the Contact has registered.* |
| **Reviewed:** | Pending *Indicates if this Contact has been reviewed for access. Access will not be fully granted until the Contact has been Reviewed.* |
| **Frozen:** | - *Indicates if this Contact is frozen and unable to authenticate to the Web Portal.* |
| **Locked:** | - *Indicates if this Contact is locked and unable to authenticate to the Web Portal.* |
| **Certification Details** | |
| **Expiration:** | 2/18/2025 12:52:05 PM |
| **Last:** | - |
| **Options:** | - |
| Single Sign-On (SSO) Options | |

## Home Screen:

| Home | Placements | Administration | Support | Logoff |
|---|
| Welcome | Test Agency |

**Welcome**

Welcome **Andrea R.**

You have successfully logged on to the **United Holding Group Web Portal**.

You are currently logged in utilizing your credentials defined for **Test Agency**.

This site requires Contact Certification for authentication. Your Certification is currently set to expire on 7/14/2025 at 10:12:49 AM. You will not be able to authenticate upon expiration.

You are configured as a Certification Administrator. There is 1 additional active Contact defined for this Company that has Web Portal access. Click here to manage these Contacts in the Administration section.

Use the Support Contacts section of the Web Portal to view the contacts available for certification and Platform support.

You are authorized to use the following sections of the Web Portal:

- Placements

Please use the Pending Activity Items page to review items that require your attention.

# UHG I LLC

## Administration:

**DN Portal|HomeScreen|Administration:**

- **#1 Company Contact Search:** List of company contacts, access credentials, certification details
- **#2 Contact Re-Certification Listing:** List of company contacts user registration, expiration, re-certification

| Administration Section |
| --- |
| **Contact Administration** |
| 1. Company Contact Search<br>Allows for the administration of Web Portal Contacts that are associated to the current Company |
| 2. Contact Certification Listing<br>Allows for the administration of Web Portal Contact Certification for the current Company |
| 3. Contact Batch Update<br>Allows for the batch creation and update of Contacts for the current Company |
| **Contact Right Templates** |
| 4. Contact Right Templates<br>Allows for the review of available Web Portal Contact Right Templates that are available for the current Company |
| 5. Contact Right Code Values<br>Allows for the review of available Web Portal Contact Right Code Values that are available on the Platform |
| **Company Administration** |
| 6. Collection Licensure<br>Allows for the administration of Collection Licensure that is associated to the current Company |

## Support:

**DN Portal|HomeScreen|Support:**

- **#2|Ledger Item Statement Search:** List of open and closed ledgers
- **#6 Support Documents:** Includes manuals for Servicers, Requirement Schedules, Law Firm Work Standards, Bulk Upload Media Requests, Access to Media Fulfillment Packages, Entering Issues (disputes, fraud, identity theft) into DebtNext, Video Training

# UHG I LLC

| Detail | Items |
|---|---|
| **UHG Manuals** | |
| **DebtNext Web Portal Manual**<br>DebtNext Manual | 1. *Web Portal*<br>Web Portal<br>Web-Portal.docx |
| **Entering Issues into DebtNext**<br>Detail screen walk through to enter/resolve issues in DebtNext. | 1. *Entering Issues in DebtNext*<br>Walk through of process to enter/resolve issues in DebtNext.<br>DebtNext Training Issues(1).pptx |
| **Servicers** | |
| **UHG Servicing Manual**<br>DebtNext Requirements and Expectations for Servicers | 1. *UHG Servicing Manual*<br>DebtNext Requirements and Expectations for Servicers<br>Updated Mar 2022<br>DN-UHG Servicer DN Material_ Updated 03.20.22.pdf |
| **Law Firms** | |
| **Law Firm Requirement Schedule**<br>UHG Law Firm Requirement Schedule | 1. *Law Firm Requirement Schedule*<br>Law Firm Requirement Schedule updated 07-2023<br>Law Firm Requirement Schedule(SOP).pdf |
| **UHG Legal Servicing Manual**<br>DebtNext Requirements and Expectations for Law Firms | 1. *UHG Legal Servicing Manual*<br>DebtNext Requirements and Expectations for Law Firms - updated 07-2023<br>DN-UHG Legal Servicer DN Material_ 07-2023.pdf |
| **Law Firm DN Work Standards**<br>Law Firm DN Work Standards | 1. *Law Firm DN Work Standards*<br>Law Firm DN Work Standards<br>Law Firm DN Work Standards v1.pdf |
| **Media** | |
| **Bulk Media Upload Manual**<br>Directions on how to load media into DebtNext. | 1. *DN UHG Bulk Media Upload Manual*<br>Manual on how to upload Documents to DN (i.e. judgment, stipulations, correspondence) Manual for media and affidavit requests<br>DN-UHG Bulk Media Upload Manual.pdf |
| **Using 7Zip to Access Media Fulfillment Packages**<br>7 Zip is a 3rd party tool that will need to be downloaded to access the media packages | 1. *How to use 7 ZIP*<br>How to use 7 ZIP to access Media Fulfillment packages<br>7Zip Media Fulfillment.docx |
| **Video Training** | |
| **New User Setup-Password Reset**<br>New User Setup Training - 2 Step Authentication Password Reset location | 1. *New User Setup*<br>Password Reset<br>Clip_New User Setup_Password Reset(1).mp4 |

# UHG I LLC

File Layouts and Complete Data File Extracts Screenshots:

## Home Screen|Pending Activity Items

**UNITED** HOLDING GROUP

dPlat R

Home |

**Welcome**

Welcome ▓▓▓▓▓▓

You have successfully logged on to the **United Holding Group Web Portal**.

You are currently logged in utilizing your credentials defined for ▓▓▓▓▓▓▓▓▓

Use the Company Selector to utilize credentials for a different company.

You are authorized to use the follow sections of the Web Portal:

- Administrative
- Placements

Please review Pending Activity Items that require your attention.

## Pending Activity Items|Active Placements

**UNITED** HOLDING GROUP

dPlat Reco

Home | Plac

**Pending Activity Items**

| Type | Count |
|------|-------|
| **Placement** | |
| Active Placements<br>Current listing of active Placements for the current company. | 1 |
| Media Fulfillment Package Ready For Download<br>Media Request Fulfillment Packages that are Ready For Download for the current company. | 4 |
| Assigned Pending Resolution Issues/Disputes<br>Pending Resolution Account Issues/Disputes that require action. | 3 |
| Contact Appends<br>Contact Appends that currently require attention. | 4 |
| Employer Appends<br>Employer Appends that currently require attention. | 4 |

# UHG I LLC

## Pending Activity Items|Active Placements|Placement Listing ID:

| Placement Listing | | | | | | |
|---|---|---|---|---|---|
| ID | Company \| Entity \| Type | Accounts | Balance | Message | Status |
| 75 | ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ <br> UHG I LLC <br> External Agency | ▓▓▓▓ | ▓▓▓▓▓▓▓ | - | Active |

## Pending Activity Items|Active Placements|Placement Listing ID|Summary Screen:

**Placement Number: 75**

Summary | Pools | Liquidation | Reports | Issue Log | Messaging | File Transfers | Transactions | Recall Activity
Activity | Inventory | Search

### Placement Summary and Activity Review

| Background | | Inventory Account Allocation History | |
|---|---|---|---|
| **Company:** | ▓▓▓▓▓▓▓▓▓▓▓▓▓ | **Accounts:** | ▓▓▓▓▓ |
| **Placement Owner:** | ▓▓▓▓▓▓ | **Total Balance:** | $▓▓▓▓▓▓▓▓▓ |
| **Owner:** | Paula Pericozzi | **Active Inventory Accounts** | |
| **Entity:** | UHG I LLC | **Accounts:** | ▓▓▓▓ |
| **Work Detail Items:** | - | **Total Balance:** | ▓▓▓▓▓▓▓ |
| **Status:** | Active | **Inventory Account Status Aging** | |
| **Created:** | 8/17/2022 2:41:36 PM | **Within 30 Days:** | ▓▓▓▓ |
| **Reporting** | | **Beyond 30 Days:** | ▓▓▓▓ ⚠ |
| **Date:** | 2/13/2025 8:52:33 AM | **Inventory Account Issues** | |
| **Complete Data File:** | Comma-Delimited Text \| Excel | **Attention Required:** | ▓ ⚠ |
| **Interface:** | 84 \| UHG Custom Agency | **Pending Resolution:** | ▓▓ |
| **File Transfer Activity** | | **Promises** | |
| **Ready for Download:** | - | **Delinquent:** | 42 ⚠ |
| **Recall Confirmations:** | 9 ⚠ | **Open \| %:** | 60 (0.08%) |
| **Payment Due:** | - | **Keepers** | |
| **Status Due:** | - | **Expiring:** | - |
| **Reconciliation Due:** | - | **Open \| %:** | 12 (0.02%) |
| **Messaging** | | **Geography Licensure** | |

## Complete Data File Extracts:

### Reporting|Complete Data File: (Text|Excel)

- **Complete Data File:** This is a complete data file of all Active Placements currently placed with Servicer, utilizing a similar layout to Account Notice. This file is generated daily as of the Reporting Date, listed directly above. **This is NOT the Placement file or Account Notice, do not map or program or load files using this layout.**

**Interface Format ID:** File Layouts for Incoming and Outgoing Files
**84-UHG Custom Agency**
**90-UHG Custom Legal**

Priority Requirement Due Dates:

## Agency Accounting Updates Due: Noon EST, Mon & Thurs
- **504|Transaction Update:** Remit transactions
- **519|Activity Append Update:** Post Date Report

## Law Firm Accounting Updates Due: Noon EST, Mon (or scheduled date)
- **525|Transaction Update:** Remit transactions
- **523|Activity Append Update:** Post Date Report

## Status Updates can be submitted as frequently as possible, at a minimum Friday by Noon EST:
- **503\524| Status Update:** Close and Return Accounts
  - Recalls Acknowledgements are due within 24 hours (800 Bin) via Status Update. Status Update should be a matching 900 status code to the 800-recall code, unless it's eligible as a keeper
  - Account Closures are due weekly by Fri at Noon or as often as Servicer wants to send

## Activity Append Updates submitted as frequently as possible, at a minimum Friday by Noon EST:
- **519\523|Activity Append**

## Reconciliation|546\556: reconcile active inventory and balances only
  - **Agency Recon due 3<sup>rd</sup> Thursday of the Month** after Transaction and Status Update has been submitted in this order Transaction, Status, Reconciliation. The UHG team will process the files in this order upon receipt.
  - **Legal Recon due 3<sup>rd</sup> Monday of the Month** after Transaction and Status Update has been submitted in this order Transaction, Status, Reconciliation. The UHG team will process the files in this order upon receipt.

## Lawsuit Updates submitted as frequently as possible, at a minimum Friday by Noon EST:
- **539|Judgment Update:** Lawsuit and Judgment Reporting

# UHG I LLC

**Outgoing|Notice:** priority file layouts for Notices sent by UHG to the Servicer

1. **Account Notice|492\528:** Placement File
1. **Contact Append|517\532:** Additional Contacts available on account
2. **Employer Append|511\535:** Employment Details available on account
3. **Asset Append|515\529:** Asset Details available on account (typically bank account details)
4. **Activity Append|514\527:** if any activity on the account this will be sent with the Account Notice
5. **Bankruptcy Append|516\530:** provided in the event there is historical bankruptcy data
6. **Change Log Notice|509\531:** if origination account data changes a change log will be sent with current and new value
7. **Recall|513\537:** Daily recalls are sent through this file and should be responded to within 24 hours
8. **Transaction|510\538:** Direct Payments or Balance Adjustments sent through this file layout

## Agency Notices

**Outgoing | Notice**
Indicates that the File Transfer will be sending information from the Platform to the Placement Company. Outgoing is synonymous to Notice indicating that the Platform will be sending a notice of information with the outgoing data file.

| | | | |
|---|---|---|---|
| 492 \| Account | **Account**<br>Reg F Fields on Agency Account Notice | 185 | Standard |
| 560 \| Data File | **Account \| Complete Data File**<br>- | 158 | Standard |
| 514 \| Activity Append | **Activity Append**<br>- | 22 | Standard |
| 515 \| Asset Append | **Asset Append**<br>- | 44 | Standard |
| 516 \| Bankruptcy Append | **Bankruptcy Append**<br>- | 161 | Standard |
| 509 \| Change Log | **Change Log**<br>- | 5 | Standard |
| 517 \| Contact Append | **Contact Append**<br>- | 26 | Standard |
| 518 \| Deceased Append | **Deceased Append**<br>- | 53 | Standard |
| 520 \| Dispute | **Dispute**<br>- | 20 | Standard |
| 511 \| Employer Append | **Employer Append**<br>- | 30 | Standard |
| 512 \| Media Document Availability | **Media Document Availability**<br>- | 5 | Standard |
| 513 \| Recall | **Recall**<br>Custom Agency Recall Notice | 12 | Standard |
| 549 \| Reconciliation \| Not Included | **Reconciliation \| Not Included**<br>- | 12 | Standard |
| 548 \| Reconciliation \| Results | **Reconciliation \| Results**<br>- | 31 | Standard |
| 510 \| Transaction | **Transaction**<br>- | 13 | Standard |

## Law Firm Notices

**Outgoing | Notice**
Indicates that the File Transfer will be sending information from the Platform to the Placement Company. Outgoing is synonymous to Notice indicating that the Platform will be sending a notice of information with the outgoing data file.

| | | | |
|---|---|---|---|
| 528 \| Account | **Account**<br>Reg F Fields on Legal Account Notice | 196 | Standard |
| 561 \| Data File | **Account \| Complete Data File**<br>- | 158 | Standard |
| 527 \| Activity Append | **Activity Append**<br>- | 22 | Standard |
| 529 \| Asset Append | **Asset Append**<br>- | 44 | Standard |
| 530 \| Bankruptcy Append | **Bankruptcy Append**<br>- | 161 | Standard |
| 531 \| Change Log | **Change Log**<br>- | 5 | Standard |
| 532 \| Contact Append | **Contact Append**<br>- | 30 | Standard |
| 533 \| Deceased Append | **Deceased Append**<br>- | 53 | Standard |
| 534 \| Dispute | **Dispute**<br>- | 20 | Standard |
| 535 \| Employer Append | **Employer Append**<br>- | 30 | Standard |
| 241 \| Result | **Media Fulfillment Package**<br>- | 9 | Standard |
| 537 \| Recall | **Recall**<br>Custom Agency Recall Notice | 12 | Standard |
| 558 \| Reconciliation \| Not Included | **Reconciliation \| Not Included**<br>- | 12 | Standard |
| 557 \| Reconciliation \| Results | **Reconciliation \| Results**<br>- | 31 | Standard |
| 538 \| Transaction | **Transaction**<br>- | 13 | Standard |

# UHG I LLC

**Incoming|Update:** priority file layouts for Updates sent by the Servicer to UHG

1. **Transaction Update:** Remit transactions
2. **Activity Append Update:** Post Date Report
3. **Status Update:** Close and Return Accounts
4. **Reconciliation:** reconcile active inventory and balances

## Agency Updates

**Interface Format Listing**

| Interface Format | Description | Fields | Type |
|---|---|---|---|
| **Incoming | Update** Indicates that the File Transfer will be utilized by the Placement Company to send information to the Platform. Incoming is synonymous to Update indicating that the Platform will be updated with the incoming data file. | | | |
| 502 | Account Update | **Account** The File Transfer Account Update allows the Placement to update specific Inventory Account Application Fields based on client requirements. The Account Update should only be utilized if field updates are within the scope of the work standards. | 20 | Standard |
| 519 | Activity Append | **Activity Append** The File Transfer Activity Update allows the Placement to create specific Inventory Account Activity Appends based on client requirements. The Activity Append Update should only be utilized if Activity Appends are within the scope of the work standards. | 21 | Standard |
| 541 | Asset Append | **Asset Append** The File Transfer Asset Update allows the Placement to create and update specific Inventory Account Asset Appends based on client requirements. The Asset Append Update should only be utilized if Asset Appends are within the scope of the work standards. | 26 | Standard |
| 544 | Bankruptcy Append | **Bankruptcy** The File Transfer Bankruptcy Append Notice file format is utilized to generate the Inventory Account Bankruptcy Append notice that includes new and updated Bankruptcy Appends that are associated to Inventory Accounts allocated to the Placement. The Interface Format is utilized within File Transfer notice. This file must be received and processed within the requirements of the client work standards. | 45 | Standard |
| 542 | Contact Append | **Contact Append** The File Transfer Contact Update allows the Placement to create and update specific Inventory Account Contact Appends based on client requirements. The Contact Append Update should only be utilized if Contact Appends are within the scope of the work standards. | 25 | Standard |
| 545 | Deceased Append | **Deceased** The File Transfer Deceased Update allows the Placement to create and update specific Inventory Account Deceased Appends based on client requirements. The Deceased Append Update should only be utilized if Contact Appends are within the scope of the work standards. | 21 | Standard |
| 508 | Dispute Update | **Dispute** - | 21 | Standard |
| 543 | Employer Append | **Employer Append** The File Transfer Employer Update allows the Placement to create and update specific Inventory Account Employer Appends based on client requirements. The Employer Append Update should only be utilized if Employer Appends are within the scope of the work standards. | 30 | Standard |
| 539 | Judgment Update | **Judgment** The File Transfer Judgment Update allows the Placement to update and communicate Inventory Account Judgment details and disposition based on client requirements. The Judgment Update should only be utilized if Judgments are within the scope of the work standards. | 41 | Standard |
| 547 | Media Update | **Media** The File Transfer Media Update allows the Placement to create Inventory Account Media Document attachments based on client requirements. The Media Update should only be utilized if submitting Inventory Account Media Documents is within the scope of the work standards. | 5 | Standard |
| 546 | Reconciliation Update | **Reconciliation** The File Transfer Reconciliation Update allows the Placement to generate an Inventory Account reconciliation based on client requirements. The Reconciliation Update should be utilized at the defined frequency within the scope of the work standards. | 10 | Standard |
| 503 | Status Update | **Status** Status Update | 15 | Standard |
| 504 | Transaction Update | **Transaction** The File Transfer Transaction Update allows the Placement to create Inventory Account Transactions based on client requirements. Transactions must have a specific type and should adhere to remittance processing requirements that are defined within the operational workflow with the client. Transactions can include Payments, Reversals, Fees and Adjustments. | 13 | Standard |

# UHG I LLC

## Law Firm Updates

| Interface Format Listing | | | |
|---|---|---|---|
| **Interface Format** | **Description** | **Fields** | **Type** |
| **Incoming \| Update**<br>Indicates that the File Transfer will be utilized by the Placement Company to send information to the Platform. Incoming is synonymous to Update indicating that the Platform will be updated with the incoming data file. | | | |
| 522 \| Account Update | **Account**<br>The File Transfer Account Update allows the Placement to update specific Inventory Account Application Fields based on client requirements. The Account Update should only be utilized if field updates are within the scope of the work standards. | 20 | Standard |
| 523 \| Activity Append | **Activity Append**<br>The File Transfer Activity Update allows the Placement to create specific Inventory Account Activity Appends based on client requirements. The Activity Append Update should only be utilized if Activity Appends are within the scope of the work standards. | 21 | Standard |
| 550 \| Asset Append | **Asset Append**<br>The File Transfer Asset Update allows the Placement to create and update specific Inventory Account Asset Appends based on client requirements. The Asset Append Update should only be utilized if Asset Appends are within the scope of the work standards. | 26 | Standard |
| 553 \| Bankruptcy Append | **Bankruptcy**<br>The File Transfer Bankruptcy Append Notice file format is utilized to generate the Inventory Account Bankruptcy Append notice that includes new and updated Bankruptcy Appends that are associated to Inventory Accounts allocated to the Placement. The Interface Format is utilized within File Transfer notice. This file must be received and processed within the requirements of the client work standards. | 45 | Standard |
| 551 \| Contact Append | **Contact Append**<br>The File Transfer Contact Update allows the Placement to create and update specific Inventory Account Contact Appends based on client requirements. The Contact Append Update should only be utilized if Contact Appends are within the scope of the work standards. | 25 | Standard |
| 554 \| Deceased Append | **Deceased**<br>The File Transfer Deceased Update allows the Placement to create and update specific Inventory Account Deceased Appends based on client requirements. The Deceased Append Update should only be utilized if Contact Appends are within the scope of the work standards. | 21 | Standard |
| 526 \| Dispute Update | **Dispute**<br>- | 21 | Standard |
| 552 \| Employer Append | **Employer Append**<br>The File Transfer Employer Update allows the Placement to create and update specific Inventory Account Employer Appends based on client requirements. The Employer Append Update should only be utilized if Employer Appends are within the scope of the work standards. | 30 | Standard |
| 539 \| Judgment Update | **Judgment**<br>The File Transfer Judgment Update allows the Placement to update and communicate Inventory Account Judgment details and disposition based on client requirements. The Judgment Update should only be utilized if Judgments are within the scope of the work standards. | 41 | Standard |
| 555 \| Media Update | **Media**<br>The File Transfer Media Update allows the Placement to create Inventory Account Media Document attachments based on client requirements. The Media Update should only be utilized if submitting Inventory Account Media Documents is within the scope of the work standards. | 5 | Standard |
| 556 \| Reconciliation Update | **Reconciliation**<br>The File Transfer Reconciliation Update allows the Placement to generate an Inventory Account reconciliation based on client requirements. The Reconciliation Update should be utilized at the defined frequency within the scope of the work standards. | 10 | Standard |
| 524 \| Status Update | **Status**<br>Status Update | 15 | Standard |
| 525 \| Transaction Update | **Transaction**<br>The File Transfer Transaction Update allows the Placement to create Inventory Account Transactions based on client requirements. Transactions must have a specific type and should adhere to remittance processing requirements that are defined within the operational workflow with the client. Transactions can include Payments, Reversals, Fees and Adjustments. | 13 | Standard |