ROL (Revenue OnLine) User Guide

For OAA Client Agencies

Updated: 11/10/2022

Purpose of this guide

This guide was created for Other Agency Account (OAA) client agency staff that have access and use Revenue OnLine (ROL). It will provide valuable information on how to navigate through the different pages and will also supply step-by-step instructions on how to perform different functions when logged into the site.

OAA may periodically update this guide in response to significant changes to the ROL environment from system enhancements and upgrades. In order to avoid confusion or technical problems, we strongly suggest to always use the newest guide available that is supplied on our web site https://www.oregon.gov/DOR/programs/gov-research/Pages/oaa-agencies.aspx under the heading “Current Client Agencies”.

Terminology

OAA client agencies are registered as “customers” in ROL.

OAA programs are registered as “accounts” and their program codes are their “account IDs”.

“Profile”, when used, is specifically referencing the ROL profiles for customers, accounts, and users.

What is new?

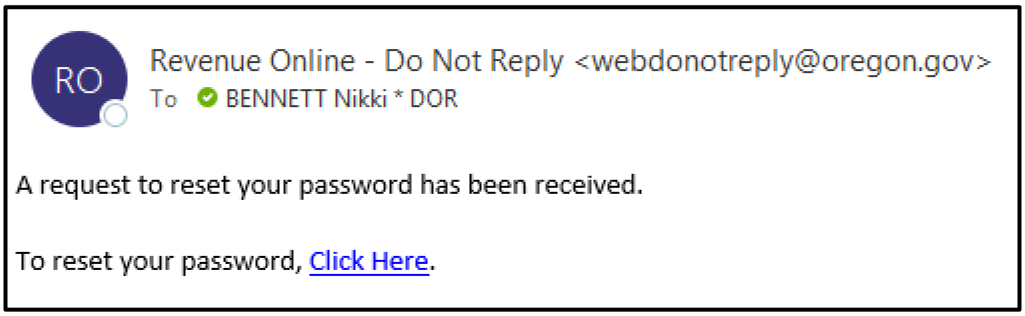
11/10/22	➢ Complete update of guide due to Department of Revenue upgrading system to Version 12. All ROL Screens have changed significantly. ➢ Send debt file to DOR link now on Home screen. ➢ Add Debt link now on Home screen. ➢ Add Debt assignment form is now multiple screens instead of one. ➢ Ability to maintain ROL accesses has been removed.
05/01/21	➢ Added a link to the ROL sign on screen. ➢ Updated “How-to: Submit a new debt collection assignment” to include information on Joint & Several and where to add the collections fee if your agency adds it before submitting to OAA. ➢ Added new link “How-to: Submit a saved debt collection assignment”. ➢ Entire document updated with screenshots.
07/18/18	➢ Removed report appendix (migrated to OAA Client Agency Technical Guide document) ➢ Entire document updated (including screenshots), highlights: o “Profile page” is now “Settings page” o Messages can be sent from the “I Want To” menu o Adding/managing logons has changed significantly o Password re-entry no longer required to complete single debt assignments and change/delete/payment advice requests
03/06/17	➢ Made corrections to the Recon report field layout chart in Appendix A: Reports ➢ Updated screenshots ➢ Minor changes and updates to content ➢ Changed document text font to DOR standard for external communications
12/15/16	➢ Updated “How-to: Make changes to an additional logon” to include information on changing a user’s debt management permissions. ➢ Updated “How-to: Upload a debt file” to include information about an error message.
11/08/16	➢ Updated Payments, Stats and Recon report details in Appendix A: Reports.
10/28/16	➢ This is the first production version of this guide. Chronological updates will display here in the future.

Table of contents

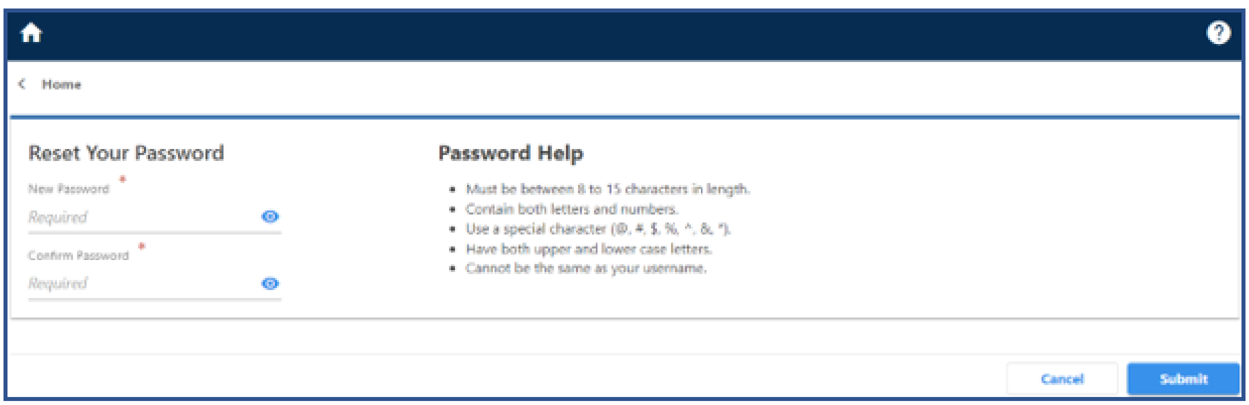
Clicking the "^" link next to each section title will take you back to this page.

Initial setup after first logon ^

Once you have contacted the OAA Program Analyst at: OAA.TechnicalHelp@dor.oregon.gov requesting access to ROL, you will receive an e-mail. This e-mail will be from the same Technical box and will supply your User Logon. Your User Logon will be your e-mail address or something like an e-mail address. Once your access has been created, the Program Analyst will do a password reset which will force the system to send you a system generated e-mail.

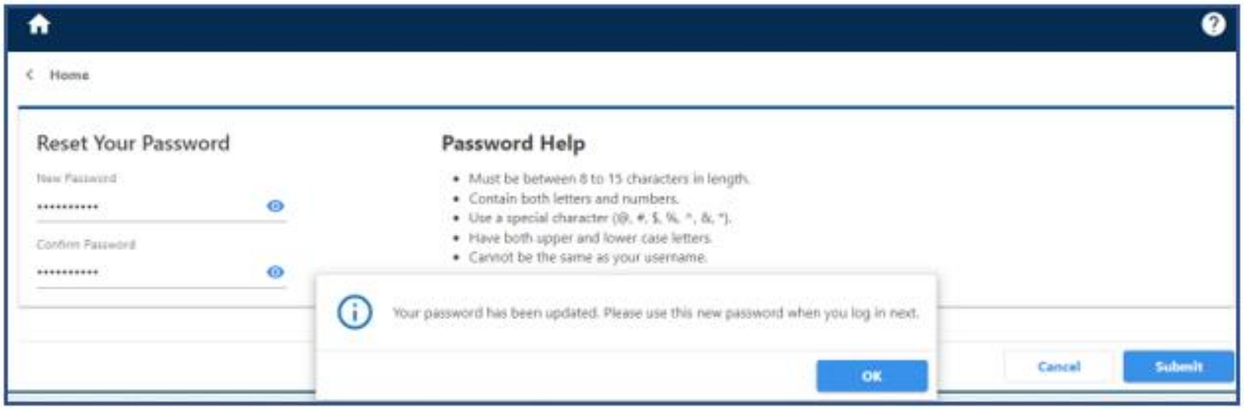


When you click on the blue hyperlink "Click Here", you will be taken to a web page that will allow you to create your own password. Password Rules are also provided.



The link to this password reset page is only good for a one-time use. If you click on the link and do not complete the password set up, you will need to contact OAA.TechnicalHelp@dor.oregon.gov again and ask for another password reset.

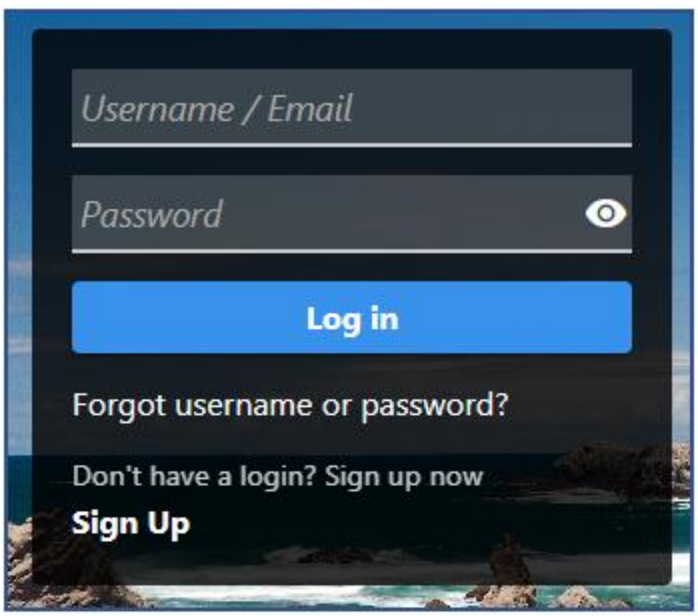
The password you create for this site will never expire!



After you click on “OK” from creating your new password, you will be taken to the ROL log on screen.

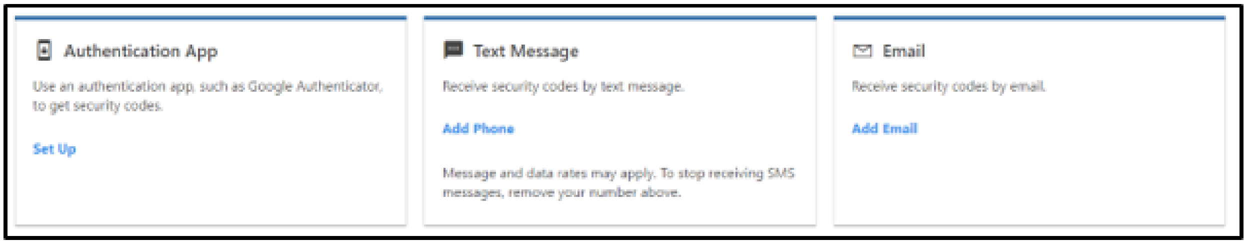
*FYI – you will also receive an additional e-mail from the system letting you know that your password has been updated.

Book mark this page:

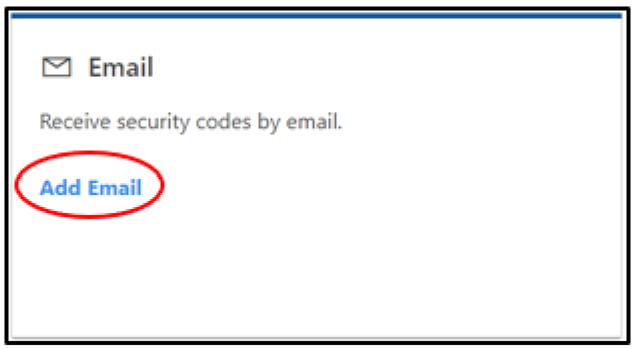


ROL Log on page: https://revenueonline.dor.oregon.gov/tap/_/

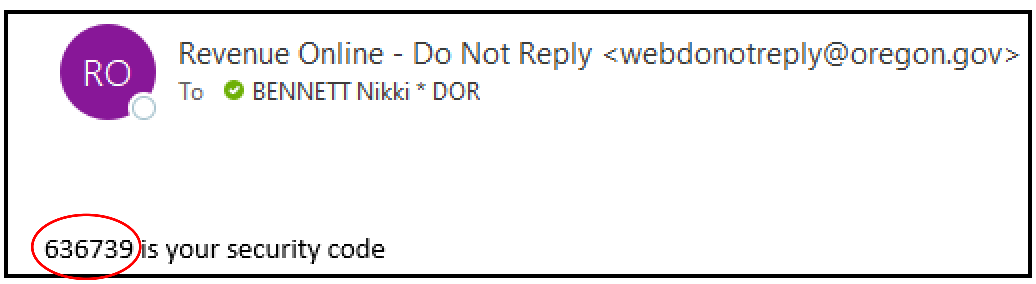
Just like logging into your bank account for the first time, we must verify the computer you are using. The system will give you the option of how you would like to receive your authentication:



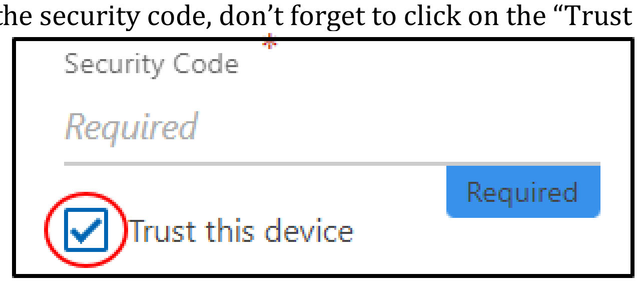
To receive your authentication by e-mail, click on the "Add Email" blue hyperlink:



Enter the e-mail address you want to receive the security code at. You will receive a system generated e-mail with the authentication code.

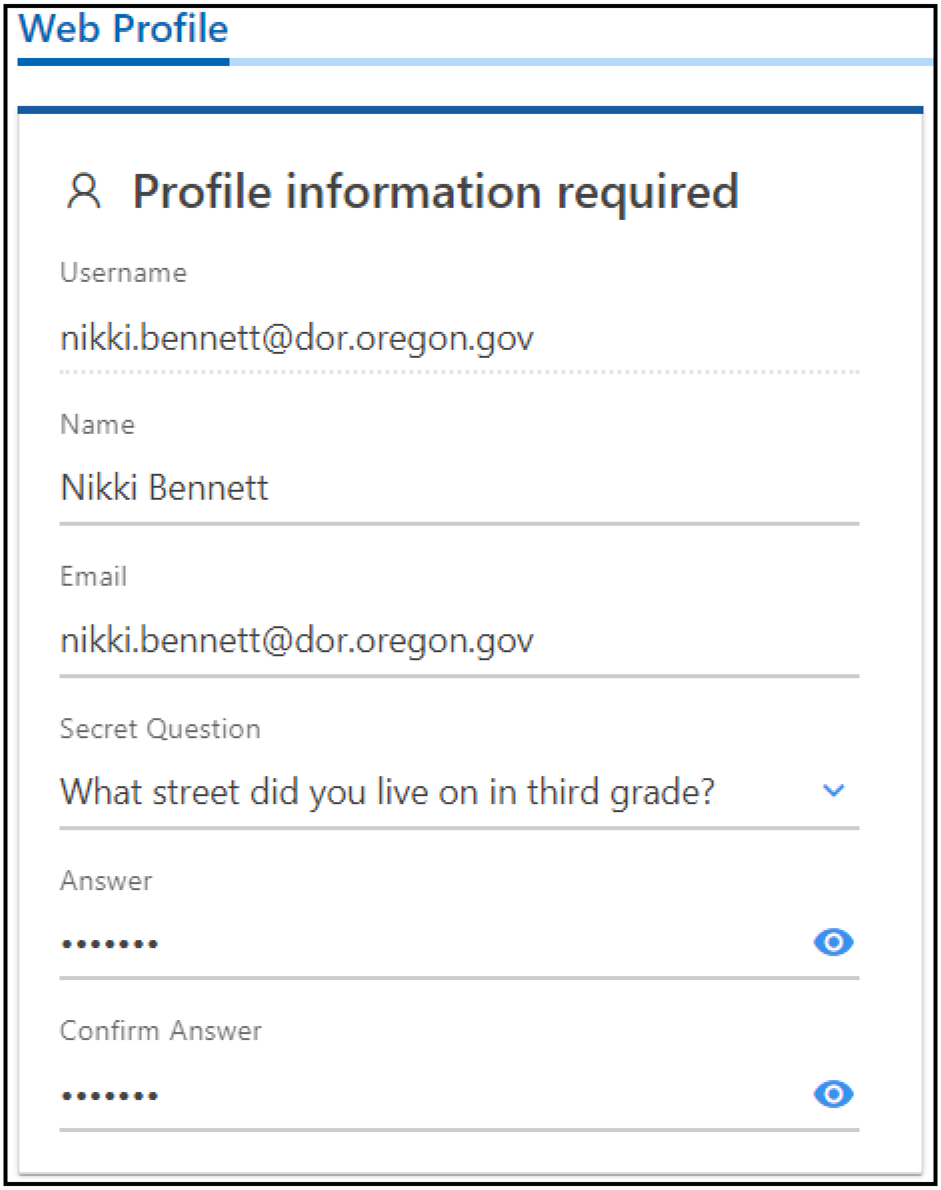


Once you have entered the security code, don't forget to click on the "Trust this device" box.



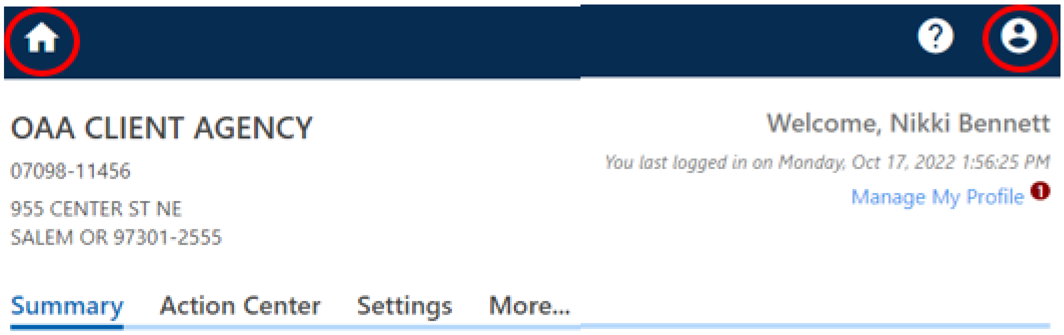
Clicking "Confirm" will then take you to the Web Profile screen.

Selecting a Secret Question from the drop-down list is required. Enter your answer to the secret question twice. This information will be used as a second verification if you forget your password in the future.



Click "Save" to complete the set up.

Home page ^



This is the main customer landing page when you first log on.

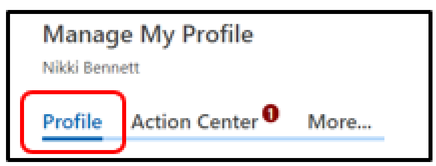
If you should get lost in screens, click on the "home" icon in the top bar to get back to the main customer landing page.

If the home icon disappears and all you see is:

Revenue Online

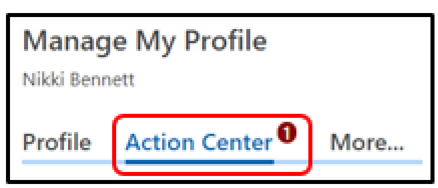
This is also a hyperlink that will take you back to the main customer landing page.

This icon is where you are able to Log Out or go to your "My Profile".

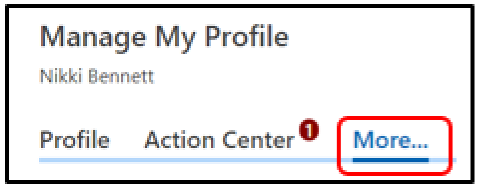


With the Profile tab open, you can:

- Change your profile information.
- Change your Secret Question.
- Change how you receive your verification code.

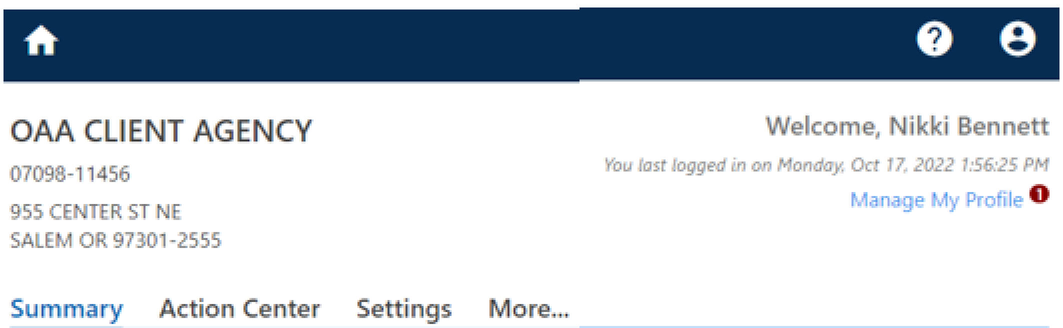


With the Action Center tab open, you can view your messages!

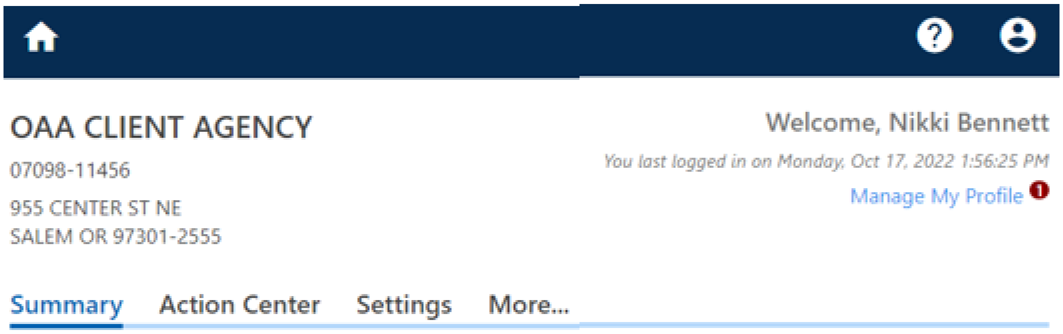


With the More… tab open, you can:

- View Messages.
- Search for Submissions sent.



The main landing page will show your agencies address on the top left. On the top right, you will have your welcome banner. The link "Manage My Profile" will take you to the exact same place as clicking on  and "My Profile".

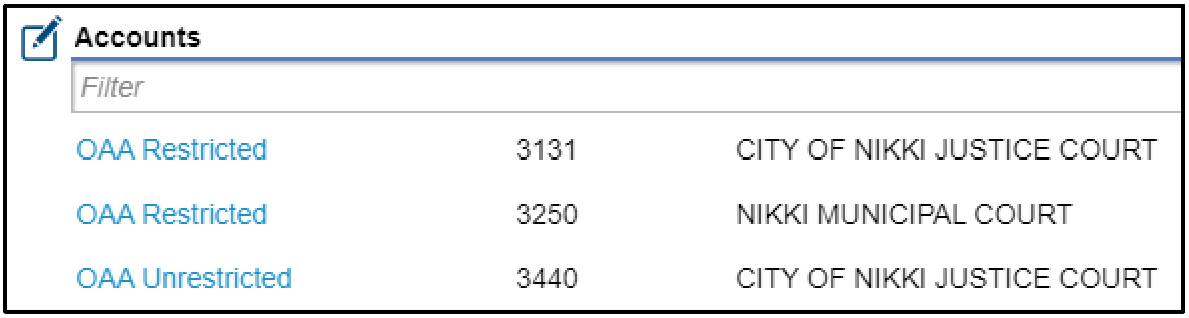


The rest of the home page is divided into tabs. Each agency may have different tabs available, but the common ones are:

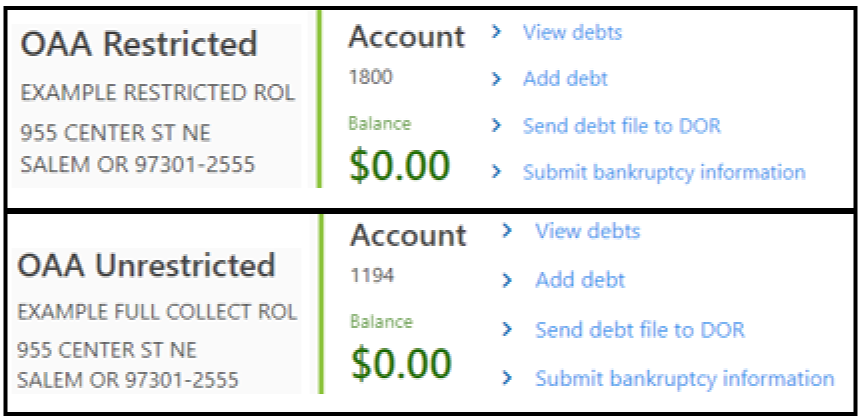
- Summary – Displays the list of program codes you have access to. You are able to click a link to perform actions directly associated with that program.
- Action Center – Allows you to access customer-level requests you have submitted and access messages.
- Settings – Allows you to change Account Security settings and should be left as is.
- More… (More Options) - Allows you to view access, messages, and search submissions.

Account page ^

Previously looked like this:



The new screen:



The Account is the program Customer name, address, Program Code and Balance. The Balance will always show a zero.

From the home screen, you will now be able to:

- View debts.
- Add debts – takes you to the manually fillable assignment form.
- Send debt file to DOR – let's you upload an electronic debt file for processing.
- Submit bankruptcy information – let's you send OAA bankruptcy details and attach bankruptcy documents.

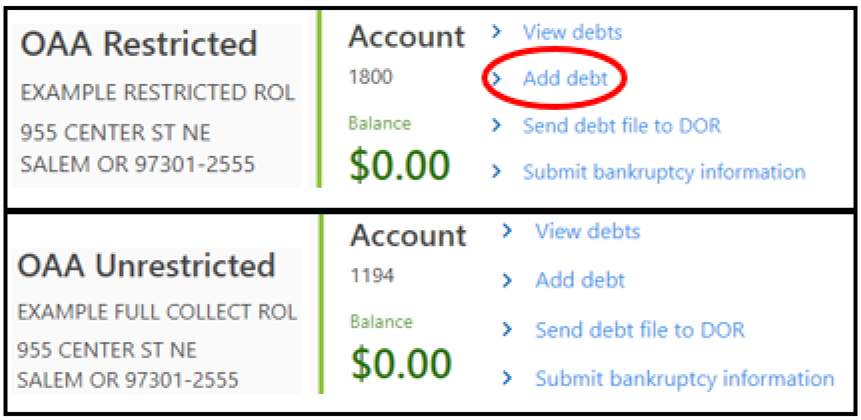
How-to: Create an additional logon ^

Agencies are now no longer able to manage ROL access and logons. If your agency has an employee that needs access to ROL granted or revoked, please send request to: OAA.TechnicalHelp@dor.oregon.gov.

How-to: Submit a new debt collection assignment ^

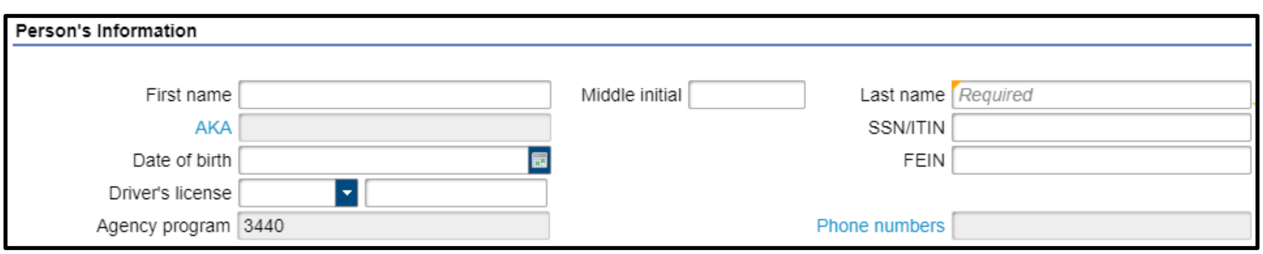
If you are going to manually assign debts to OAA for collection, follow these steps.

1. From your Home screen, click on the blue hyperlink "Add debt" in the box next to the program you are wanting to add a new collection to.



2. Choose whether the debtor is a Business or an Individual.
   - If the debtor is a sole proprietor or owner of a single-member LLC, select Individual.

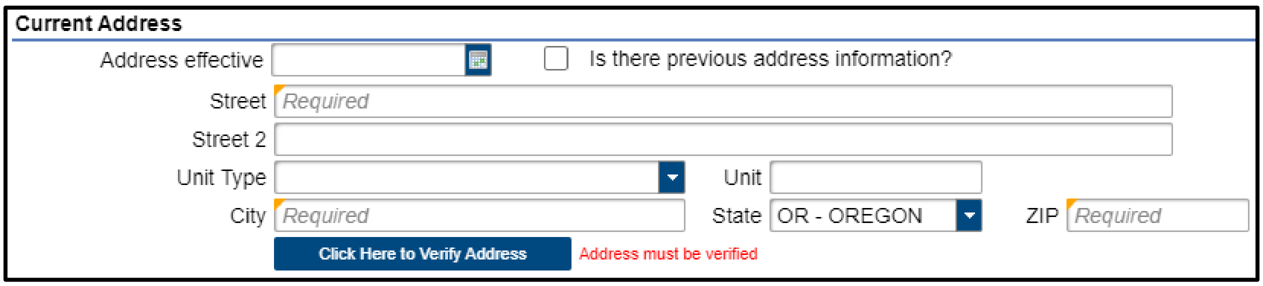
3. Click "Next".
4. Enter Person's Information (layout is different, but same information is requested).



The form will show you which fields are required (Last name is required, but please provide the debtor's full name). If possible, please provide as much additional information as possible such as:

- AKA's by clicking on the blue hyperlink "AKA".
- Debtor's Date of birth.
- Debtor's Driver's license State and Number.
- SSN (required if submitting a debt under a Restricted program).
- FEIN if you are submitting the debt as Debtor Type = Business.
- Phone numbers by clicking on the blue hyperlink "Phone numbers".

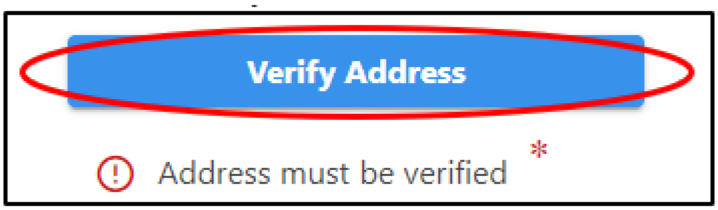
5. Click "Next" once the information has been entered.
6. Debtor's current Address Information.



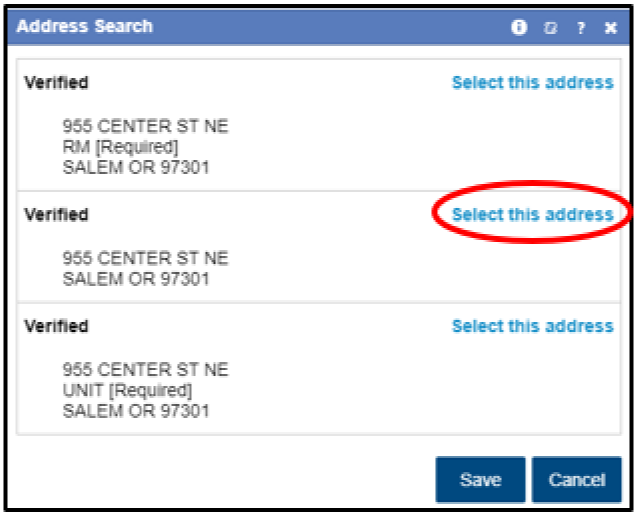
Provide the debtor's address. An address is required so you will need to enter the best last known address even if you have had returned mail.

- Address effective - the date when you last verified the debtor's current address and can be left blank if you do not have this information.
- Is there previous address information? If so, mark the box and it will supply a screen for you to add additional information.

Our system needs to confirm the address you entered exists. Once you have completed filling in an address, you then must click on the "Verify Address" button.

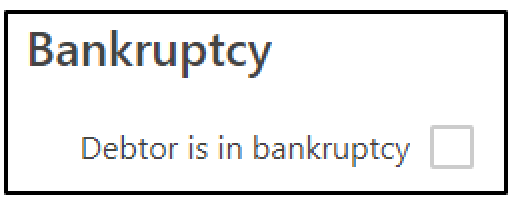


- If the system cannot find a match, or if you do not agree with the system's suggestion, you can proceed with using the address exactly as you have entered it by clicking on the "Select this address".



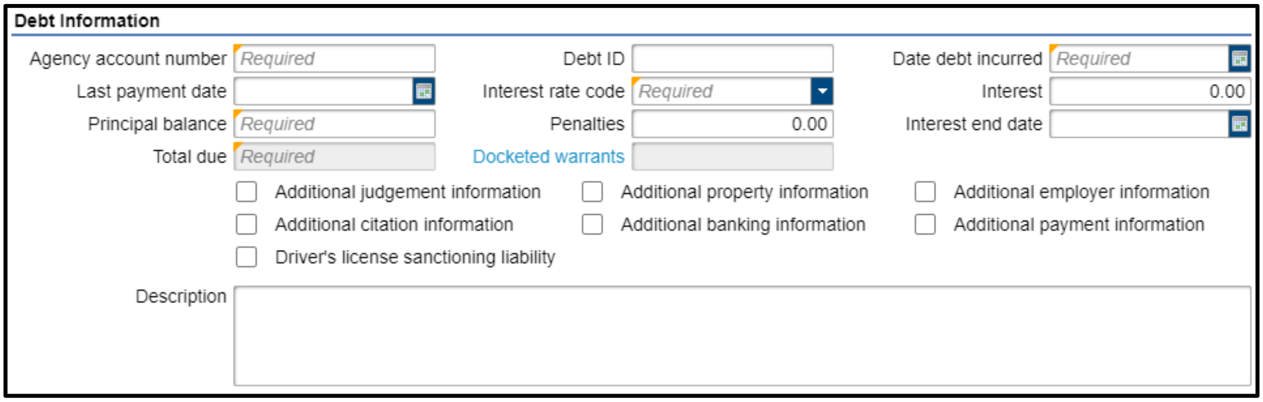
- Once you click on "Select this address", you will be taken back to the address screen, you will not have to click the "Save" button.
- A green check will be next to Address Verified.

7. Click "Next".
   - The next screen will have a box to check if you know the debtor is in bankruptcy. Leave box unchecked if no bankruptcy or you do not know.



8. Click "Next".

9. Debt Information.

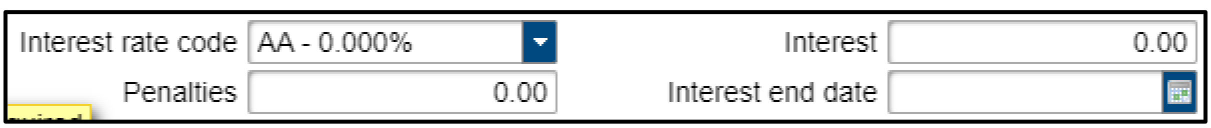


- Agency account number is required and is the Agency ID that is listed on the monthly reports. This should be a unique identifier associated with only this debtor.

Joint and Several debts: Use the same Agency account number on each debtor that owes the same joint and several debt.

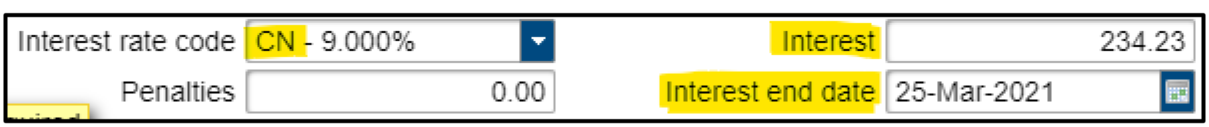
- Debt ID needs to be used if your agency uses the same Agency ID for multiple debts for one debtor. This should be a unique number for each debt under the debtor's name. This number is not listed on the monthly reports.
- Date debt incurred - required.
- Last payment date - not required.

➢ If your agency does NOT accrue interest on a debt:



- Interest rate code – AA for zero
- Interest – blank or a zero-dollar amount
- Interest end date - blank

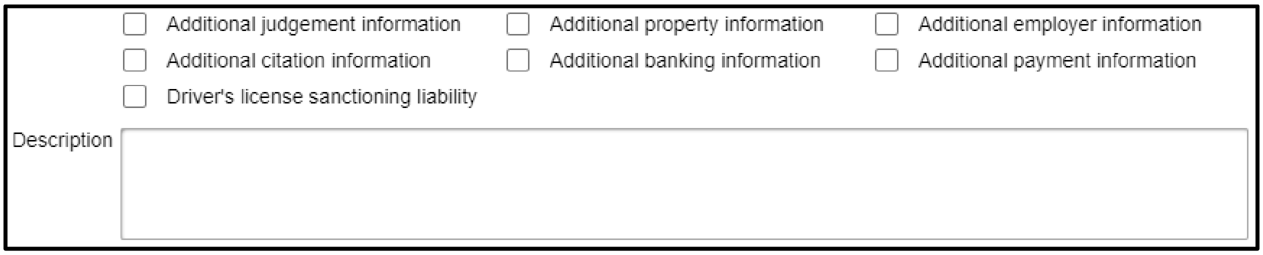
➢ If your agency DOES accrue interest on a debt:



- Interest rate code – use the drop-down arrow and select the correct interest percentage.
- Interest – the amount of interest your system has accrued up until submission of the debt to OAA.
- Interest end date – the date your system accrued interest up to. Our system will take over from that date forward.

- Principal balance – debt amount owed by debtor.
- Penalties – collections fee ONLY if your agency adds the cost of collection to the debt BEFORE submitting to OAA. (Restricted programs do not use Penalty field.)

OAA's system can add the cost of collections and pass it on to the debtor. If your agency has a program set up to pass the fee on, do NOT add a collection fee to the debt amount.



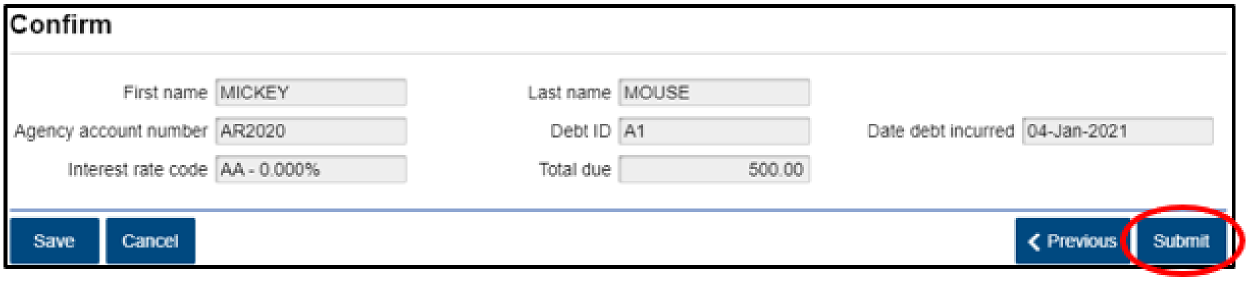
- Additional judgment, property, employer, citation, banking, or payment information can be provided by checking the appropriate box.
- Description – this is a free form text box used to tell us what the debt is for. This information is added to the system as a comment on the debt and available to the OAA staff for review.

Joint & Several debts – list the other Joint debtors name(s) and social security number (if available) in the Description field.

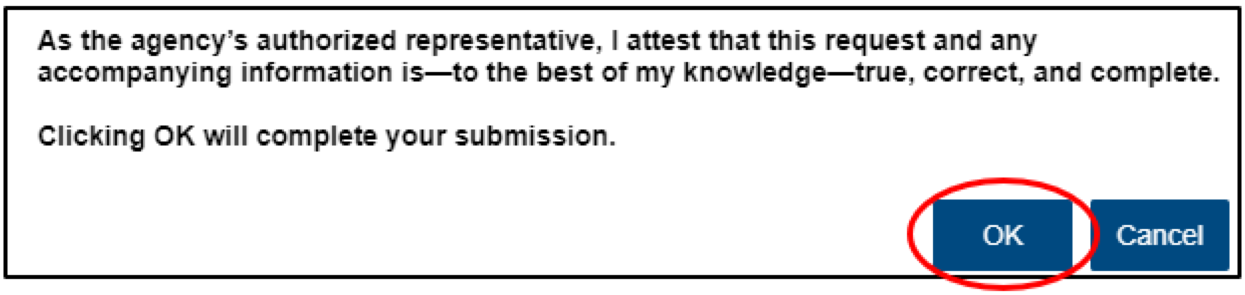
10. Click the "Next" button to proceed.
    - If any of the additional information boxes at the bottom of the page are checked, you will be presented with the appropriate form to fill out. Once done, you will then click "Next" to proceed.

If you are not ready to submit the debt to OAA, or you need to get additional information for the form, click on "Save" on the bottom left. You will be given a confirmation for this as well and can then click on "Finish Later". The form will be stored for you to finish and submit later.

11. Confirmation page will show a brief amount of what you entered on the form:



- Click “Submit”.



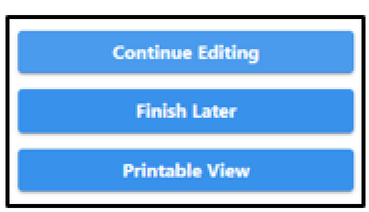
- Click “OK” to complete the submission.
  - You will receive a system generated e-mail with the Debt Maintenance confirmation number.

Another Confirmation page is made available for printing and once you click “OK” on that page, you are done!

- If you do not want to submit the debt yet and want to wait and submit it at a different time, you can click on the “Save Draft” button instead.

- Click the “Ok” button. Even though it says, “Clicking OK will complete your submission”, that is not the case. It will only be saved to your ROL log on. The debt is not actually submitted to DOR for collections.

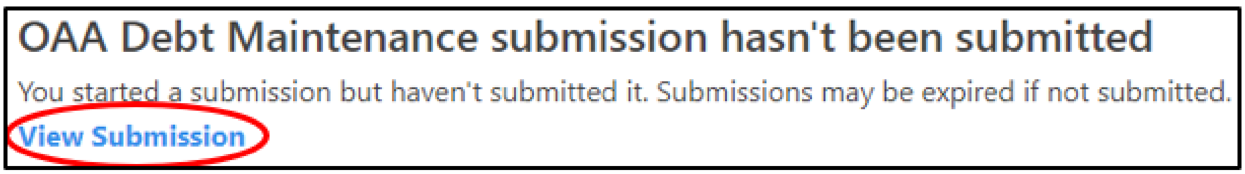
- Click on “Finish Later”.



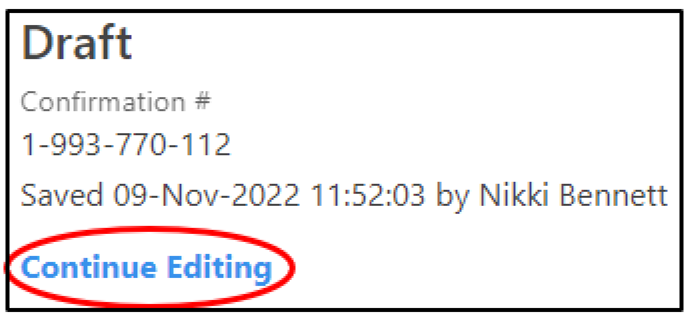
How-to: Submit a saved debt collection assignment ^

From your Home screen, click on the "Action Center Items" blue hyperlink to the left of the Program Code account:

The next screen will tell you about the submissions that have not been submitted yet. Click on the "View Submission" blue hyperlink:



Click on the blue hyperlink "Continue Editing".

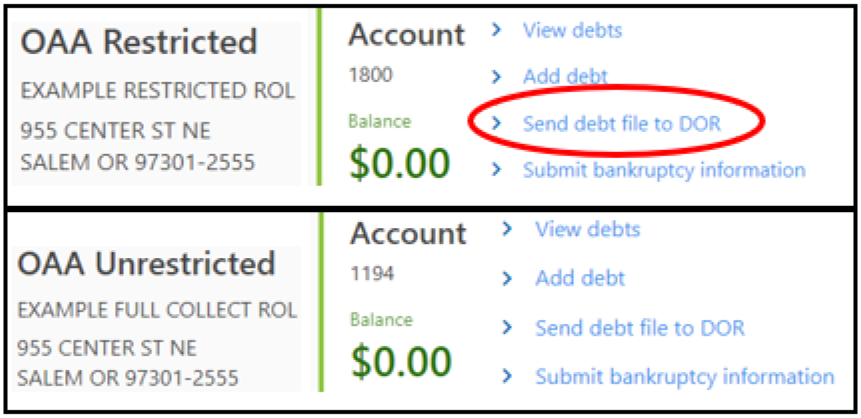


- You will need to click the "Next" button through the screens and complete what you want as you go. Once done, you can then click on the "Submit" button on the final submission screen.

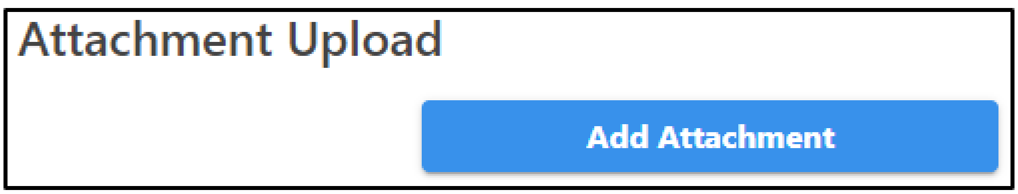
How-to: Upload a debt file ^

If you want to provide a debt file with multiple transactions to OAA, follow these steps.

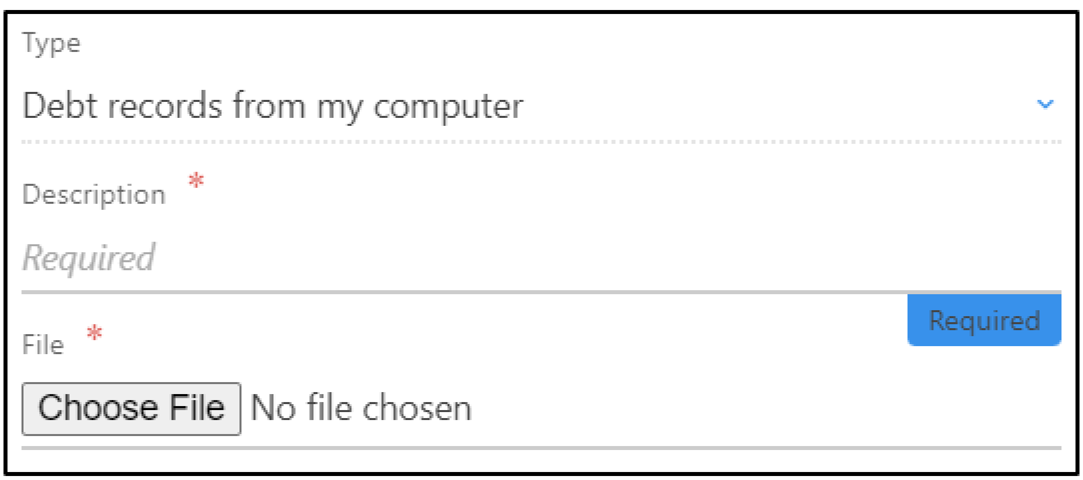
1. From your Home Page, click on the blue hyperlink "Send debt file to DOR" next to the program you want to Upload a debt file for.



2. Click on the "Add Attachment" button.



The next screen to pop up with be called "Select a file to attach". This is where you will browse to where your file is saved in your system and attach it to ROL.



- Type – can be left on the default "Debt records from my computer".
- Description – a required field.
- Choose File – click on this to browse to your file and select it.

3. Click “Ok” once you have retrieved the file for upload and then click “Next”.

4. Click the “Submit” button.

5. Enter your ROL password as confirmation and click “OK”.

   If there is a critical problem with the file, you will receive an error message and the file will not be uploaded. First check the layout of the file and make sure it is formatted correctly. If you are unable to resolve the issue, e-mail: OAA.TechnicalHelp@oregon.gov

6. You will receive a confirmation number.

How-to: Upload other documents ^

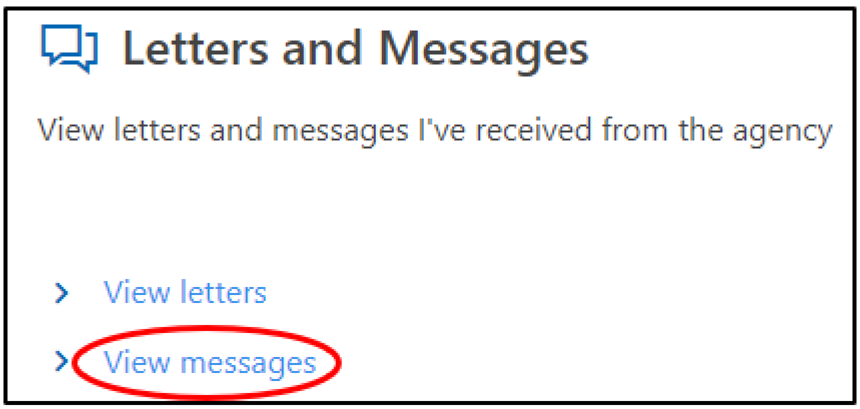
If you want to provide documents other than debt files to OAA, you will need to do this through a message. Under "How-to: Send a message", the message option of either "Login Information" or "Request a Report" gives the ability to send an attachment to DOR.

How-to: Send a message ^

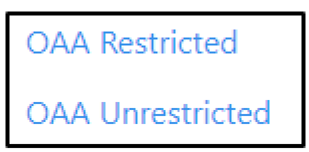
To send a message to OAA, follow these steps.

1. From your Home screen, click on the "More Options" tab.

2. In the Letters and Messages box, click on the blue hyperlink "View messages".



3. Towards the top right, click on the blue hyperlink "Send a Message".
4. Click on the blue hyperlink next to the program you are sending a message for.



The Customer and Account sections will be listing your agency name and the program code you are sending a message to Revenue under.

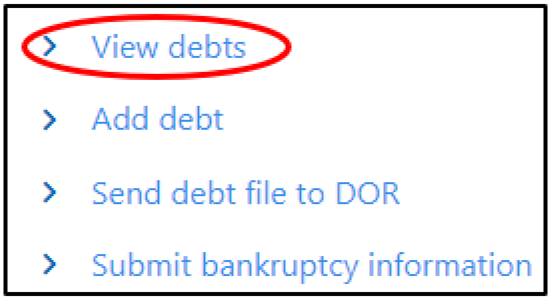
5. Message Type is required – select the appropriate message type from the drop-down menu. The type you select directs the message to the appropriate staff.
    - Account Maintenance Question
        - Balance inquiries
        - Payment inquiries
        - Accounting inquiries
        - Settlement offers
        - Recall requests
        - Change balance requests
    - Apportionment Question – not generally used.
    - Driver's License Reinstatement Program – used by debtors.
    - Login Information – for questions about adding or revoking other employee accesses to ROL. This selection will allow you to attach a document to send to DOR.
    - Monthly Funds Transfer Question.
        - Transfer amount received does not match the payment report total.
        - Money transfer not received as expected.
    - Monthly Reports Question – any question you may have regarding the monthly reports you receive.
    - Other Question – please do not select this option unless you are certain your message does not fit any of the other types provided.
    - Paid in Full Inquiry – not generally used. Account Maintenance Question is used.
    - Provide Additional Debtor Information – to supply additional information you may have received about the debtor. You are not able to attach any documents.
    - Recall a Debt Question – not generally used. Account Maintenance Question is used.
    - Request a Report – used if you are unable to locate a report in your ROL inbox. This selection will allow you to attach a document to send to DOR.
6. Subject – required and is where you provide a brief description of your message.
7. Message - required and is where you will type out your question or provide the information you would like to share with OAA about a debtor or your agency.

Once you have filled out the information, click on the "Submit" button. You will get a confirmation number and then click on "OK" to return to the main page.

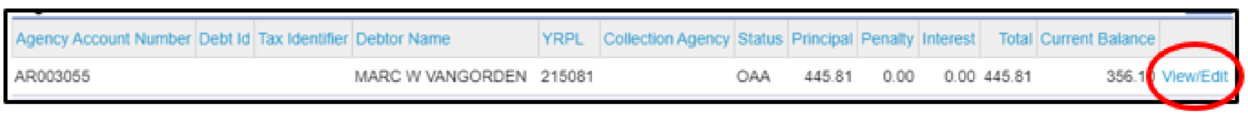
How-to: Submit a change record ^

To change the balance of a debt assigned to OAA for collection, follow these steps.

1. From your Home screen, click on the blue hyperlink "View debts" next to the program the debt is under.



2. Enter search terms to locate the debt and click "Search".
3. Next to the debt you want to change, click the "View/Edit" button.



Agency Account Number	Debt Id	Tax Identifier	Debtor Name	YRPL	Collection Agency	Status	Principal	Penalty	Interest	Total	Current Balance	
AR003055			MARC W VANGORDEN	215081		OAA	445.81	0.00	0.00	445.81	356.1	View/Edit

4. Click the "Change Debt" button.

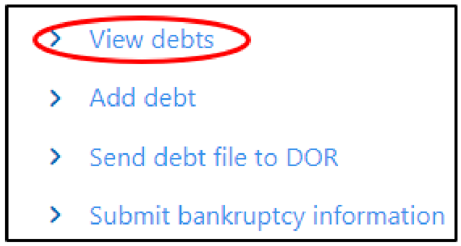
5. Enter the adjustments needed in the appropriate fields.
    a. For restricted debts, SSN is required.
    b. If the debt has increased, enter the amount it has increased by (ex: principal increased by $79.50, key "79.50" in the field on the same row under "Adjustment").
    c. If the debt has decreased, enter the amount it has decreased by (ex: penalty decreased by $200.00, key "-200.00" in the field on the same row under "Adjustment").
    d. You cannot submit a change that would reduce the principal, interest, or penalties below $0.00.
    e. You cannot submit a change that would leave a current balance of $0.00 or less. If you need to remove a debt from collection, you will need to go back and click on the "Remove Debt" button instead.
6. The "Description" box is where you can supply any additional information in regard to the "Change Debt" action you are requesting. Information you enter in this field will be added as a comment to your debt collection assignment in our system and available to OAA staff for review.

Once you have filled out the information, click on the "Next" button and then "Submit". You will get a confirmation number and then click on "OK" to return to the main page.

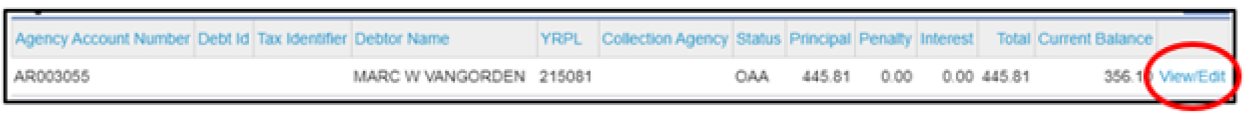
How-to: Remove a debt from collection ^

If you need to recall/delete a debt assigned to OAA for collection, follow these steps.

1. From your Home screen, click on the blue hyperlink "View debts" next to the program the debt is under.



2. Enter search terms to locate the debt and click "Search".
3. Next to the debt you want to change, click the "View/Edit" button.



4. Click the "Remove Debt" button.

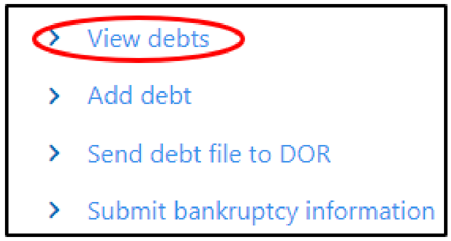
5. Verify the information is correct and that you are recalling the correct debt/debtor.
   - For restricted debts, SSN is required.
6. Choose an appropriate "Cease Reason" from the drop-down menu.
   - Bankruptcy
   - Debt Waived
   - Deceased
   - Other Reason – you will be required to provide an explanation.
   - Paid In Full
   - Payment Arraignment
   - Sent In Error
   - Wrong Debtor
7. The "Description" box is where you can supply any additional information in regard to the "Remove Debt" action you are requesting. Information you enter in this field will be added as a comment to your debt collection assignment in our system and available to OAA staff for review.

Once you have filled out the information, click on the "Next" button and then "Submit". You will get a confirmation number and then click on "OK" to return to the main page.

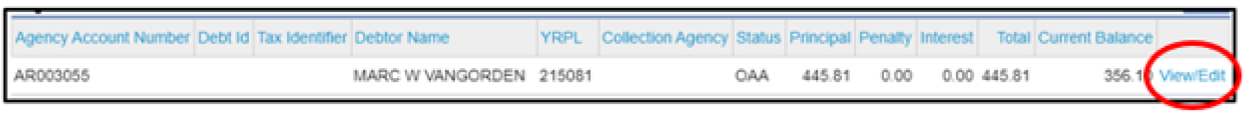
How-to: Submit a payment advice record ^

To notify OAA of a payment your agency received on a full collection debt, follow these steps.

1. From your Home screen, click on the blue hyperlink "View debts" next to the program the debt is under.



2. Enter search terms to locate the debt and click "Search".
3. Next to the debt you want to change, click the "View/Edit" button.



4. Click the "Payment Advice" button.

5. Enter the payment amount that your agency received in the Payment field that is showing as required.

   - The Received and Effective fields are not required. Our system will use the current date if they are left blank.

6. The "Description" box is where you can supply any additional information in regard to the "Payment Advice" action you are requesting. Information you enter in this field will be added as a comment to your debt collection assignment in our system and available to OAA staff for review.

Once you have filled out the information, click on the "Next" button and then "Submit". You will get a confirmation number and then click on "OK" to return to the main page.