

Client Training HQ

Understanding Order Status

Order History

Caseworkers can track the progress of Income and Expense Connect orders in Order History within the Verification Insights Portal™ (VIP).

Order History						
Recent Orders Search All Orders						
Order availability may differ by product. Certain products offer the ability to purchase a copy of an expired report.						
Showing last 16 orders						
Filter						
Report / Order ID	Inquiry SSN / Alternate ID	Name	File / Tracking	Order Date	Status	Actions
Income and Expense Connect 99999999999999999999	XXX-XX-5555	Consumer One		06/20/20XX	IN PROGRESS	
Social Service Verification: 3 Months 99999999999999999999	XXX-XX-5555	Consumer One		06/20/20XX Expires in 10 days	COMPLETED	

Order Status

After placing the Income and Expense Connect order through VIP, the following Order Statuses will inform the caseworker of where the applicant is in the Applicant WebFlow and if action is needed:

Invitation Sent

The invitation link has been sent to the applicant.

Applicant In Progress

The applicant has authenticated and started the process.

Login Help Needed

The applicant failed five login attempts and is locked out.

Submission Processing

The applicant completed the Applicant WebFlow and submitted their information for the Income and Expense Connect output to be generated.

Unable To Complete

The applicant link expired before the applicant was able to login within 10 calendar days, or the applicant webflow was not completed within 30 days of the order being placed.

Completed

The Income and Expense Connect output is available for review and to download.

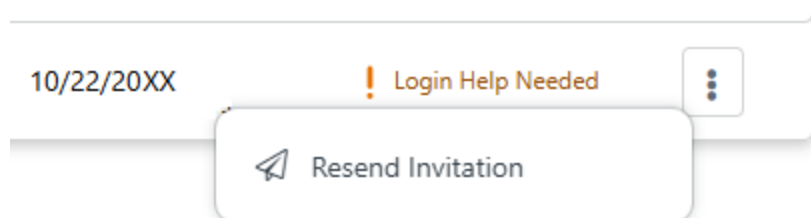
Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Potential Action Needed

If ! Login Help Needed or Unable to Complete is displayed, action is needed by the caseworker.

- In the event of **! Login Help Needed**, the caseworker should verify the last name and the last four digits of the SSN entered by the applicant match the SSN and last name returned on the SSV report. Then resend the invitation link.
- If **Unable to Complete** is shown, the caseworker should resend the invitation link. Each link is valid for 10 calendar days and can be resent as often as needed within 30 days of the Income and Expense Connect order being submitted. Once a new link is sent, the previous link is invalid.

To resend the application link the caseworker should select the ellipsis under the Action Column. Then select **Resend Invitation** and verify the preferred method of contact with the applicant before following the prompts to enter the contact information and sending the link to the applicant.



More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.