

Client Training HQ

Updated Additional Records in VIP: Financial Services

Overview

If additional employer records are available that are not included in the filter of the selected solution ordered, an option to order additional employment records will be available for the remainder of the order request date.

The ability to order additional records was previously available on VIP but has been enhanced this year as a service to provide improved functionality.

- Additional records ordering is now available to be listed on contracts and as a line item on invoices.
- Additional records are now billed as a fulfillment-based flat fee regardless of how many additional records are returned.
- Additional records ordering now has a longer time frame - it can be ordered through the end of the same day as the original verification order.

Additional records is a record add-on to an existing VOI/E order that may help reduce costs. For example, instead of starting a new order when lenders realize they need more records and paying full price for a new verification, lenders can save money by simply adding Additional Records onto the original order.

How to Order Additional Records

There are two available options for ordering Additional Records in the Verification Insights Portal (VIP): on the Report Output screen or on the Order History screen.

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

Option 1: On Report Output Screen

After placing an order, the Report Output screen will appear.

1. If Additional Records are available, an Additional Records section will appear. To order all available additional records, choose the Buy Now button to proceed.

EQUIFAX VERIFICATION INSIGHTS PORTAL™

Hi, User

New Order
Order History

Report Output

Solution Title
Inquiry Date: 05/28/20XX | Order ID: 9999999999999999
[Inquiry Details](#)
Inquiry SSN: XXX-XX-5103
Tracking Number: ABC123
Report Type: Verification of Income and Employment
Requestor Details

Permissible Purpose: Selected permissible purpose [Download Report](#)

Individual's Information
Consumer One SSN: XXX-XX-5555
*Individual's information above is data provided by Example Company

Highlights
Example Company Employment Status: [Active](#)

20XX Annual Income (YTD)	Average Hours Worked/Pay Period	Pay Cycle
\$22,914.00	80	Biweekly

Additional Records
3 Additional Records Found [Buy Now](#)

Employers

2. An Inquiry Details screen will appear to confirm that you would like to purchase these Additional Records. Click Place Order to complete your purchase.

EQUIFAX VERIFICATION INSIGHTS PORTAL™

Hi, User

New Order
Order History

Order Additional Records

Inquiry Details
Please review and click 'Place Order' to purchase the additional records for an extra fee.

SSN: XXX-XX-5555
Additional Records: 3

By pressing "Place order", you agree and certify that you currently have the permissible purpose originally selected for this order, and it is correct for this request. You further agree and certify that you are in compliance with all provisions of the Fair Credit Reporting Act, Federal Equal Credit Opportunity Act, all state law counterparts of them, and all applicable regulations promulgated under any of them.

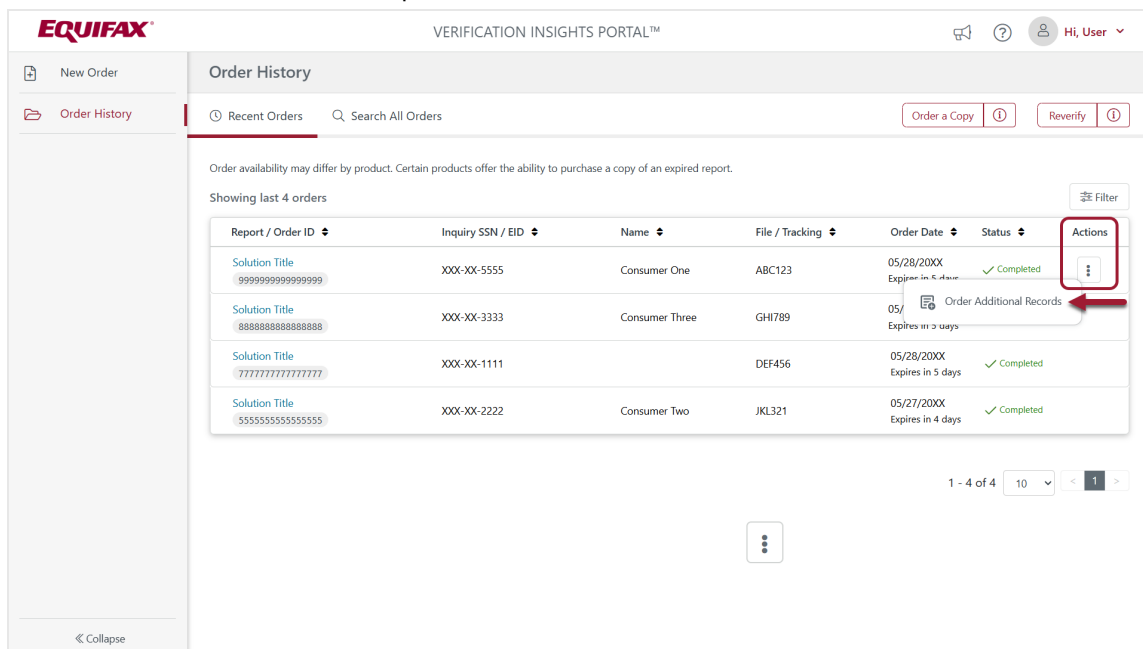
[Cancel](#) [Place Order](#)

3. You will then be taken back to the Report Output screen to view the updated verification report which now includes the Additional Records.

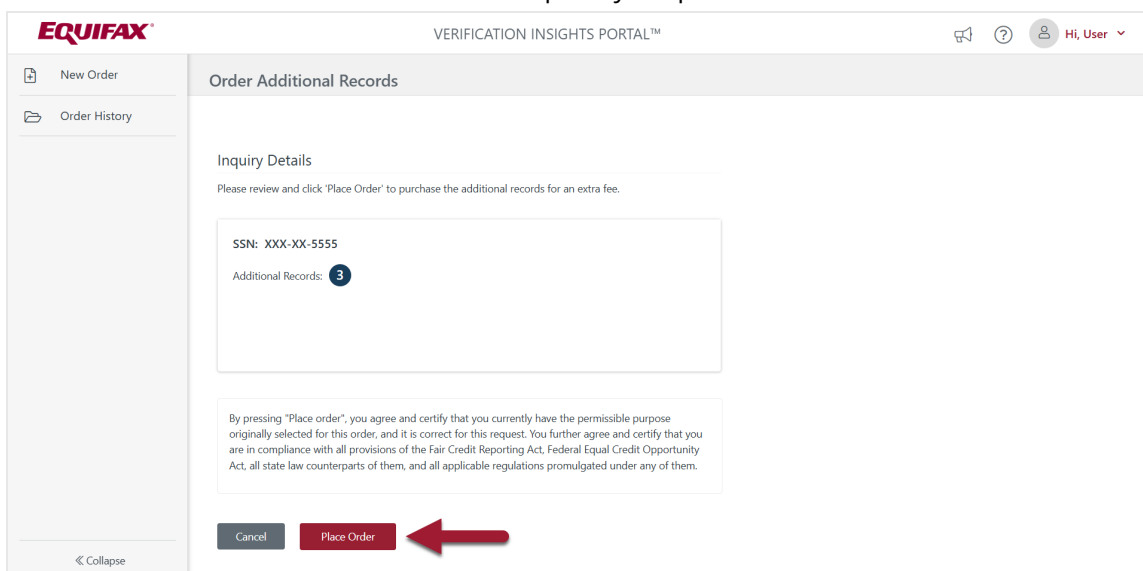
Option 2: On Order History Screen

Clicking on the Order History tab in the upper left corner of any VIP screen will take you to the Order History screen.

1. In the Recent Orders tab, for any order completed the same day, you will see an ellipsis in the Actions column. Click the ellipsis and then choose Order Additional Records.



2. An Inquiry Details screen will appear to confirm that you would like to purchase these additional records. Click Place Order to complete your purchase.



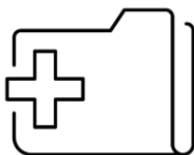
3. You will then be taken back to the Report Output screen for the original order to view the updated verification report which now includes the additional records.

Overview of Final Report

All records ordered in the original report plus all additional records will be part of one final report.



Original
Report



Additional
Records



Final
Report

Viewing Orders with Additional Records

On the Order History screen, under the Recent Orders tab, any order where additional records have been purchased and added to the verification report will have this stated in the Report title.

EQUIFAX VERIFICATION INSIGHTS PORTAL™

Order History

Recent Orders Search All Orders

Order a Copy Reverify

Order availability may differ by product. Certain products offer the ability to purchase a copy of an expired report.

Showing last 4 orders

Report / Order ID	Inquiry SSN / EID	Name	File / Tracking	Order Date	Status	Actions
Solution Title + Additional Records 9999999999999999	XXX-XX-5555	Consumer One	ABC123	05/28/20XX Expires in 5 days	✓ Completed	
Solution Title 8888888888888888	XXX-XX-3333	Consumer Three	GHI789	05/28/20XX Expires in 5 days	✓ Completed	
Solution Title 7777777777777777	XXX-XX-1111		DEF456	05/28/20XX Expires in 5 days	✓ Completed	
Solution Title 5555555555555555	XXX-XX-2222	Consumer Two	JKL321	05/27/20XX Expires in 4 days	✓ Completed	

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