Process Batch Collections

Purpose: Use this document as a reference for how to move groups of students in or out of collections in ctcLink.

Audience: Student Financials staff.

You must have at least one of these local college managed security roles:

- ZZ SF Collections

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Process Collections

Navigation: Student Financials > Collections > Process Collections

1. The **Process Collections** search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
   - NOTE: It is important to note that **Run Control IDs** cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_ADM_FYR_5 (Admissions Letter, Summer, FYR Admit Type).
3. The Process Collections page displays.
4. In the Business Unit section, enter or search for the **Business Unit**.
5. In the Option section, select the **ID Switch** drop-down and select **By EmplID.**
   a. Optional: To run this process in **Report Only** mode**,** select the **Report Only** checkbox**.**
6. Under the Parameters section, enter or search for the:
   a. **Reason In = PDA (Past Due Account)**
   b. **Reason Out =** *Typically* **PIF (Paid in Full)**
7. Select the **Run** button. Please refer to the Process Schedule Request steps for further instructions.
8. Under **Actions**, select the **Actions** drop-down link once the process has successfully posted and select **View Log/Trace.**

9. Select the **sfcollec_#####.PDF** link.
10. The PDF provides information on ID’s going into Collections as initiated, or having their collection record closed.
11. Process complete.

Note: If you select Run with the Report Only box checked, no Tables are actually updated, just a report.

To update your Past Due and Exit Due information, please refer the to SF Business Unit section at the bottom of this QRG.

Report ID: SFCOLLEC
SetID:

PeopleSoft
COLLECTIONS

Page No. 1
Run Date 07-JUN-2023
Run Time 17:03:59

EMPLID	Name	Most Past Due Category	Amount	Total Amount	Collection ID	Collector	Role Name	Comment
101013646	Edwards, Jaden	31 - 60	147.21	147.21	89639		CS - Collector A	Inserted new row
101013686	Robertson, Zion	365+	1,002.64	1,002.64	89640	CIBER	CS - Collector A	Inserted new row
101013725	Evans, Ashley	365+	116.05	116.05	89641	CIBER	CS - Collector A	Inserted new row
101013734	Henderson, Morgan	181 - 365	104.67	104.67	89642	CIBER	CS - Collector A	Inserted new row
101013805	Baker, Jules	365+	1,953.71	1,953.71	89643	CIBER	CS - Collector A	Inserted new row
101013838	Rivera, Wallis	365+	1,300.00	1,300.00	89644	CIBER	CS - Collector A	Inserted new row
101013846	Hicks, Glenn	365+	362.00	362.00	89645	CIBER	CS - Collector A	Inserted new row
101013851	Evans, Ashley	365+	2,506.00	2,506.00	89646	CIBER	CS - Collector A	Inserted new row
101013860	Peterson, Alexis	181 - 365	1,461.00	1,461.00	89647	CIBER	CS - Collector A	Inserted new row
101013863	Young, Keegan	365+	824.00	824.00	89648	CIBER	CS - Collector A	Inserted new row

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the external link to Process Batch Collections. This link will open in a new tab/window.

SF Business Unit

You must have at least one of these local college managed security roles:

- ZD SACR SF All Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

The configuration criteria that controls this in/out is found on the SF Business Unit. Both the Amount and the Past Due Category must be met to enter/exit the Collections Table.

Navigation: Setup SACR > Product Related > Student Financials > SF Business Unit