## 9.2 Working Collection Items

**Purpose:** Use this document as a reference for how to work and update student collection items in ctcLink.

Audience: Student Financials staff.

- You must have at least one of these local college managed security roles:
- ZZ SF Collections

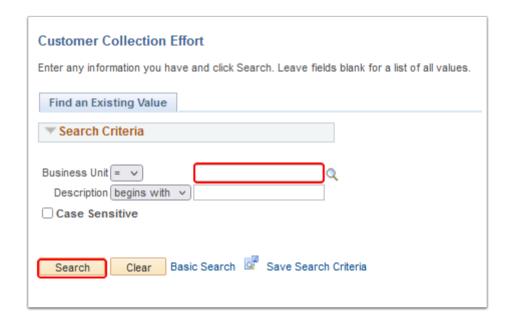
If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

### **Working Collection Items**

#### **Collection Efforts**

Navigation: NavBar > Navigator > Student Financials > Collections > Collection Effort > Update Customer Collection

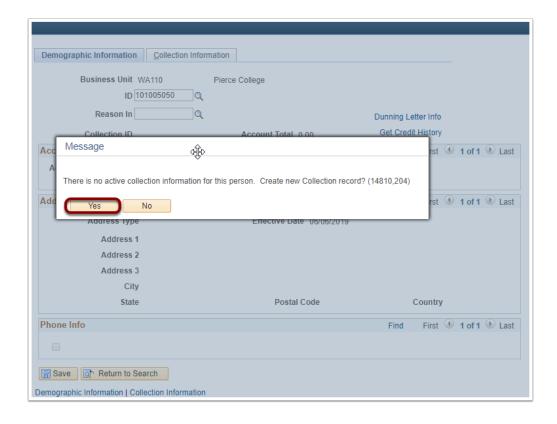
- 1. The Customer Collection Effort search page displays.
- 2. Enter the Business Unit.
- 3. Select Search.





Use the Demographic Information page to view demographic information and collection items for a student.

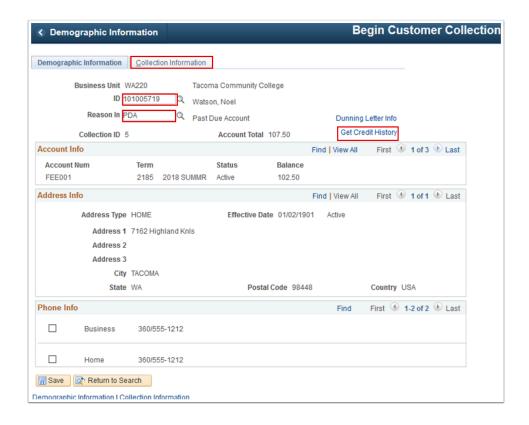
- 4. The Demographic Information tab displays.
- 5. Enter student **ID** and the **Reason In**.
- 6. When Prompted to create a new collections record, do so if needed.



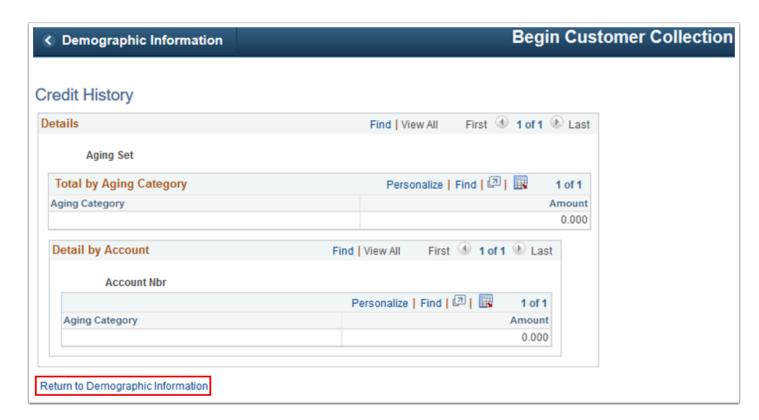
- 7. If a student's record does not have a collection letter template associated with it, the **Dunning Letter Info** link appears.
  - a. Select the link to access the Collections Dunning Letter page to select a template.
  - b. From this link you can add a Template Assign Date that is automatically added to those ID's added in batch. Since you have assigned this person manually, you will need to manually add this date if you want the individual to get picked up in the Population selection for past due letters.



8. Select the **Get Credit History** link to access the Credit History page.

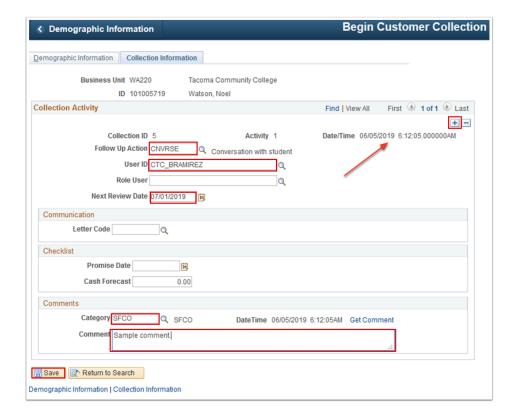


- 9. The Credit History page displays.
- 10. Select the Return to Demographic Information link.



11. The **Collection Information** tab displays. Use it to record collection steps and follow-up actions for collection items.

- 12. Select the **Add a New Row [+]** icon to add additional collection activity. Notice the rows are timestamped with when they were created.
- 13. Enter the **Follow Up Actio**n reason.
- 14. Enter the **User ID** of the collector who worked this item.
- 15. Enter the **Next Review Date** as needed. This is an optional field.
- 16. Enter any **Comments**.
- 17. Select Save.

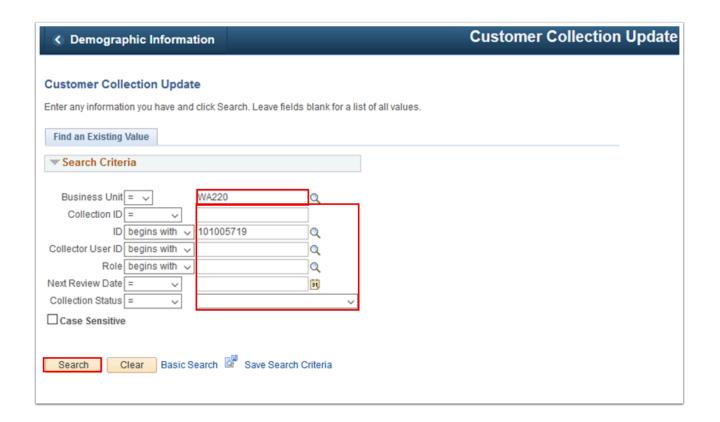


18. Section complete.

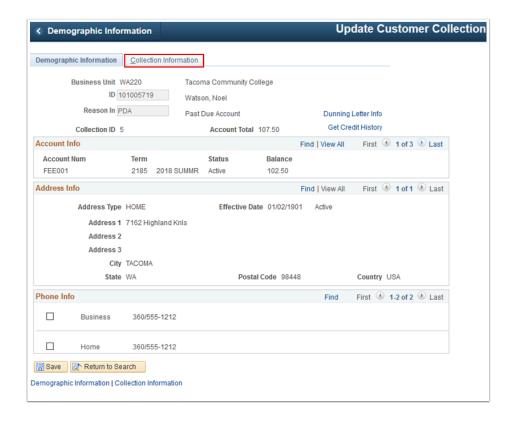
#### **Updating Customer Collection**

Navigation: NavBar > Navigator > Student Financials > Collections > Collection Effort > Update Customer Collection

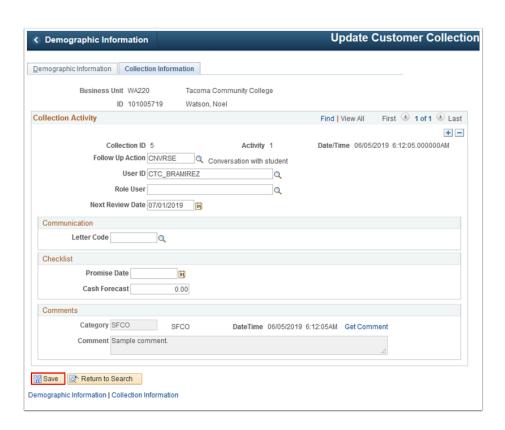
- 1. The Customer Collection Update search page displays.
- 2. Enter Business Unit.
- 3. Enter additional Search Criteria to identify your student.
- 4. Select Search.



- 1 The Updating Collections page is the same page as the Begin Customer Collections page. The only difference is the Demographic Information tab is view only and Reason In is not available for entry.
- 5. The Demographic Information tab displays
- 6. Select the **Collection Information** tab.



- 7. The Collection Information tab displays. Use it to add or update any additional notes related to the student's account.
- 8. Select Save.



9. Section complete.

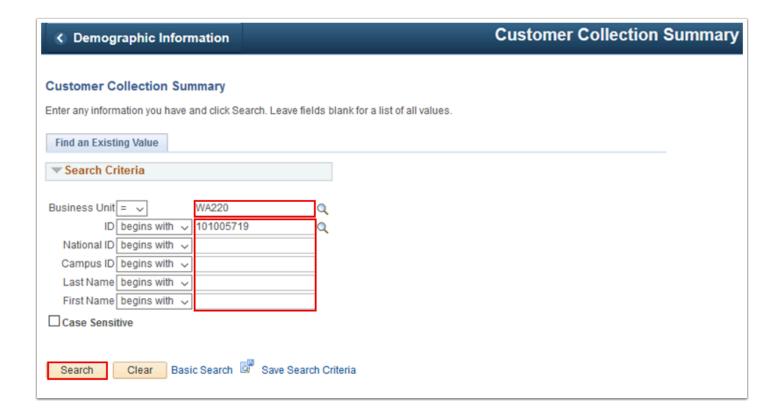
#### Viewing Customer Collection Data

- You must have at least one of these local college managed security roles:
- ZD SF Processing Inquiry
- ZZ SF Processing Inquiry

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

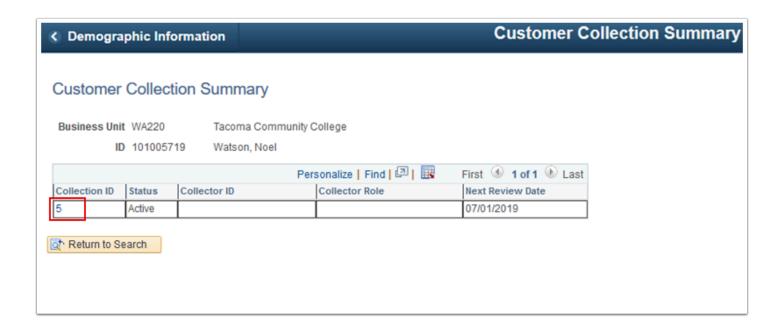
# Navigation: NavBar > Navigator > Student Financials > Collections > Collection Effort > View Customer Collection Data

- 1. The Customer Collection Summary search page displays.
- 2. Enter Business Unit.
- 3. Enter additional **Search Criteria** to identify your student.
- 4. Select Search.

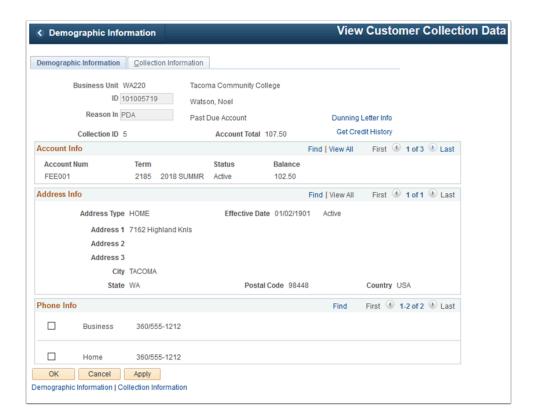


- 5. The Customer Collection Summary page displays. Use it to see how many collection items the student has and when those items will be next reviewed.
- 6. Select **Collection ID** to view the collection information detail.

• View collection activity for a student by collector queue, enabling you to view what is currently in a collector's queue.



7. The Demographic Information tab displays.



8. Process complete.