

## 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**.

## Customer Collection Effort

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

### Search Criteria

Business Unit =

Description begins with

☐ Case Sensitive

Search

Clear

Basic Search



Save Search Criteria



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.

The screenshot shows the 'Demographic Information' tab in a web application. The page displays fields for Business Unit (WA110), Pierce College, ID (101005050), and Reason In. A message dialog box is overlaid on the page, asking: 'There is no active collection information for this person. Create new Collection record? (14810,204)'. The 'Yes' button is highlighted with a red box. The dialog box also has a 'No' button. The background page shows various tabs like 'Demographic Information', 'Collection Information', and 'Dunning Letter Info'. There are also buttons for 'Save' and 'Return to Search' at the bottom.

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.

**Collections Dunning Letter**

Template Code

Address Usage

Service Impact

**Template Assign Date**

Type of Name

Mailing Code:

Template Status:

**Dunning Letter Details** Find | View All First 1 of 1 Last

Sequence Number

\*Administrative Function

\*Communication Category

\*Communication Context

Day of the Month:

\*Communication Method

\*Letter Code

Start Date

Department

Mail Status: Pending DateTime

OK Cancel

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

**Demographic Information** **Begin Customer Collection**

Demographic Information **Collection Information**

Business Unit WA220 Tacoma Community College  
 ID 101005719 Watson, Noel  
 Reason In PDA Past Due Account  
 Collection ID 5 Account Total 107.50  
 Dunning Letter Info  
 Get Credit History

**Account Info** Find | View All First 1 of 3 Last

Account Num	Term	Status	Balance
FEE001	2185 2018 SUMMR	Active	102.50

**Address Info** Find | View All First 1 of 1 Last

Address Type HOME Effective Date 01/02/1901 Active

Address 1 7162 Highland Knls  
 Address 2  
 Address 3  
 City TACOMA  
 State WA Postal Code 98448 Country USA

**Phone Info** Find First 1-2 of 2 Last

☐ Business 360/555-1212  
☐ Home 360/555-1212

Save Return to Search

Demographic Information | Collection Information

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

**Demographic Information** **Begin Customer Collection**

**Credit History**

**Details** Find | View All First 1 of 1 Last

Aging Set

**Total by Aging Category** Personalize | Find | 1 of 1

Aging Category	Amount
	0.000

**Detail by Account** Find | View All First 1 of 1 Last

Account Nbr

**Detail by Account** Personalize | Find | 1 of 1

Aging Category	Amount
	0.000

**Return to Demographic Information**

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 Action** 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**.

**Demographic Information** **Begin Customer Collection**

Demographic Information | **Collection Information**

Business Unit WA220 Tacoma Community College  
ID 101005719 Watson, Noel

**Collection Activity** Find | View All | First 1 of 1 Last

Collection ID	Activity	DateTime
5	1	06/05/2019 6:12:05.000000AM

Follow Up Action  Conversation with student

User ID

Role User

Next Review Date

**Communication**

Letter Code

**Checklist**

Promise Date

Cash Forecast

**Comments**

Category  SFCO DateTime 06/05/2019 6:12:05AM [Get Comment](#)

Comment

Demographic Information | Collection Information

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**.

Demographic Information
Customer Collection Update

### Customer Collection Update

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit = WA220

Collection ID =

ID begins with 101005719

Collector User ID begins with

Role begins with

Next Review Date =

Collection Status =

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

**i** 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 .

- The Demographic Information tab displays
- Select the **Collection Information** tab.

Demographic Information
Update Customer Collection

Demographic Information
Collection Information

Business Unit WA220
Tacoma Community College

ID 101005719
Watson, Noel

Reason In PDA
Past Due Account
Dunning Letter Info

Collection ID 5
Account Total 107.50
Get Credit History

Account Info

Find | View All First 1 of 3 Last

Account Num	Term	Status	Balance
FEE001	2185 2018 SUMMR	Active	102.50

Address Info

Find | View All First 1 of 1 Last

Address Type HOME
Effective Date 01/02/1901
Active

Address 1 7162 Highland Knls

Address 2

Address 3

City TACOMA

State WA
Postal Code 98448
Country USA

Phone Info

Find First 1-2 of 2 Last

☐ Business 360/555-1212

☐ Home 360/555-1212

Save

Return to Search

Demographic Information | Collection Information

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

Demographic Information
Update Customer Collection

Demographic Information
Collection Information

Business Unit WA220
Tacoma Community College

ID 101005719
Watson, Noel

Collection Activity

Find | View All First 1 of 1 Last

Collection ID 5
Activity 1
Date/Time 06/05/2019 6:12:05.000000AM

Follow Up Action CNVRSE
Conversation with student

User ID CTC\_BRAMIREZ

Role User

Next Review Date 07/01/2019

Communication

Letter Code

Checklist

Promise Date
Cash Forecast 0.00

Comments

Category SFCO
SFCO
DateTime 06/05/2019 6:12:05AM
Get Comment

Comment Sample comment.

Save

Return to Search

Demographic Information | Collection Information

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**.

**Customer Collection Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Search Criteria**

Business Unit = WA220

ID begins with 101005719

National ID begins with

Campus ID begins with

Last Name begins with

First Name begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

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.



Demographic Information

Customer Collection Summary

Customer Collection Summary


Business Unit WA220 Tacoma Community College

ID 101005719 Watson, Noel

Personalize | Find |  

First 1 of 1 Last

Collection ID	Status	Collector ID	Collector Role	Next Review Date
5	Active			07/01/2019

 Return to Search

7. The Demographic Information tab displays.

Demographic Information

View Customer Collection Data

Demographic Information

Collection Information

Business Unit WA220 Tacoma Community College

ID 101005719 Watson, Noel

Reason In PDA Past Due Account

Collection ID 5 Account Total 107.50

Dunning Letter Info  
Get Credit History

Account Info

Find | View All

First 1 of 3 Last

Account Num	Term	Status	Balance
FEE001	2185 2018 SUMMR	Active	102.50

Address Info

Find | View All

First 1 of 1 Last

Address Type HOME

Effective Date 01/02/1901 Active

Address 1 7162 Highland Knls

Address 2

Address 3

City TACOMA

State WA

Postal Code 98448

Country USA

Phone Info

Find

First 1-2 of 2 Last

☐ Business 360/555-1212

☐ Home 360/555-1212

OK

Cancel

Apply

Demographic Information

Collection Information

8. Process complete.