

9.2 Creating a Collection Agreement (OLD)


Purpose: Use this document as a reference for creating, reversing, and communicating collection agreements 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.

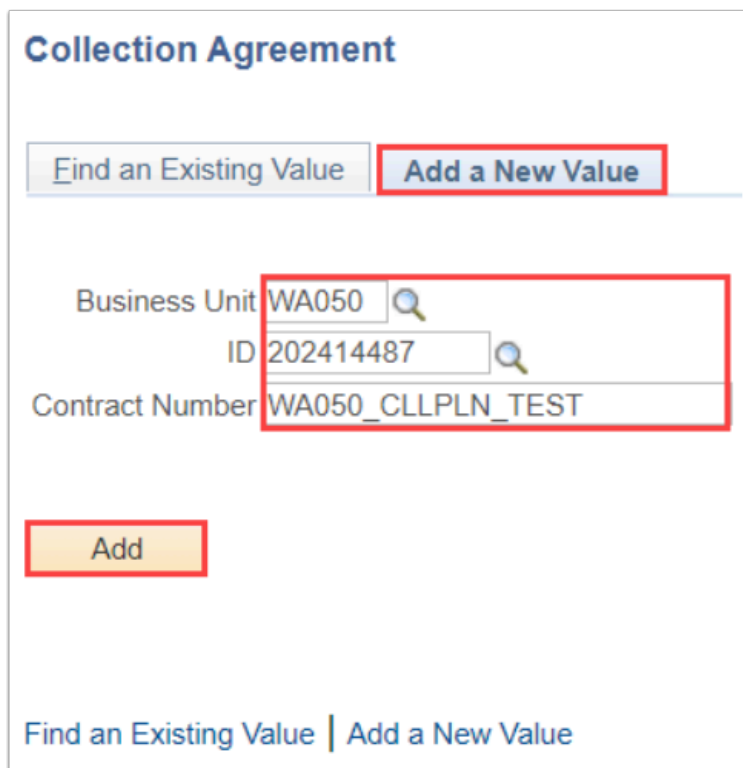
 We encourage colleges to use the delivered Payment Plan functionality instead of the Collection Agreement page for students seeking payment agreements on past due balances. The Collection Agreement page has limitations, particularly in reusing agreements for the same school or applying them to different schools. The delivered Payment Plan pages provide greater flexibility, allowing colleges to offer various options for payment agreements.

Creating a Collection Agreement

Navigation: NavBar > Navigator > Student Financials > Collections > Collection Agreement


1. The Collection Agreement search page displays.
2. Select the **Add a New Value** tab.
3. Enter the **Business Unit and ID**.
4. Contract Number:
 - a. If "Auto Numbering" is turned on, leave as **NEXT**.
 - b. If "Auto Numbering" is not utilized, enter a **Contract Name** specific to the student and your institution number if possible. Something like "WAXxx_CLLPLN_studentlastname."
5. Select the **Add** button.


-  **Auto Numbering:** It is rare that ctcLink institutions use this function as it impacts other areas within Student Financials.



Collection Agreement

[Find an Existing Value](#) [Add a New Value](#)

Business Unit 

ID 

Contract Number

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

6. The Collection Agreement page displays.
7. On the **Collection Agreement** tab, enter the **First Bill Date**.
8. Select a billing frequency in the **Billing Cycle** drop-down.
9. Enter the number of installments in the **Payments** field.
10. Select **Credit Original Account** from the **Pay Plan Type** from the drop-down.
11. In the **Account Type** field, enter **PPL** (Payment Plan).
12. **Reference Number** is optional.
13. In the **Due after Days** field, enter the number of days after the billing date that the installment is due.
14. The **Adjustment Option** field determines how to distribute any changes in the installment amount across the remaining installments:
 - **Adjust Equally:** Distributes increases equally among the unbilled installments.
 - **Adjust Last:** Adds increases to the last unbilled installment.
 - **Adjust First:** Adds increases to the first unbilled installment.
 - **Do Not Adjust:** Does not allow increases.
15. In the **Item Type** field, enter or select the item type for the installment charges.
16. In the **Pay Item Type** field, enter or select the item type that offsets the student's existing charges.

17. Select the charges to be included in the collection agreement by checking the checkbox before each charge indicated on the data sheet. **Conversion items** will not be eligible for Collection Agreements (but are shown in this example).
18. Select the **Calculate** button on the top right of the page.
19. Select the **Collection Agreement Assess** tab.

Collection Agreement
Collection Agreement Assess
Payment Distribution

Business Unit WA050
Contract Number WA050_CLLPLN_TEST

ID 202414487 Lumi Crawford

First Bill Date 12/19/2023 31

Payments 8

Amount 1,406.61

Reference Number OPTIONAL

Adjustment Option Do Not Adjust

Status Active

Billing Cycle Monthly

Pay Plan Type Credit Original Account

Account Type PPL

Due after Days 30

Item Type 390000000000 Collection Agreement Charge

Pay Item Type 690000000000 Collection Agreement

Calculate
Post

Details
Find View 3 First 1-10 of 10 Last

Account Number	Item Term	Item Type	Item Amount	Balance	Reverse
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Green Fee	5.00	5.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Elearning Support	16.00	16.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Elearning Support	16.00	16.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	BIOL& 211 Lab Fee	40.74	40.74	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Technology Fee	45.00	45.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Campus Enhancement Fee	50.00	50.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	CHEM& 121 Lab Fee	51.77	51.77	
<input checked="" type="checkbox"/> TUT001	WINTER 2023	Resident S & A	113.30	113.30	
<input checked="" type="checkbox"/> TUT001	WINTER 2023	Resident Building	129.40	129.40	
<input checked="" type="checkbox"/> TUT001	WINTER 2023	Resident Operating	939.40	939.40	

Add
Update/Display

Collection Agreement | Collection Agreement Assess | Payment Distribution

20. The **Collection Agreement Assess** tab displays. It is used to assess a fee for the agreement (optional).
 - a. **Type of Assessment:** Payment Plan Fee is typical. Other options are **Percentage of Payment Plan** or **Monthly Interest Rate**
 - **Payment Plan Fee:** Enter a dollar amount; or
 - **Percentage of Payment Plan:** Enter the percent to charge based on the dollar amount of the payment plan; or
 - **Monthly Interest Rate:** Enter the monthly interest rate.
 - b. **Assessment Fee Split:** Select an option from the drop down.
 - c. **Assessment Item Type:** Select Payment Plan Charge from the list of values.
21. Select the **Payment Distribution** tab.

Collection Agreement
Collection Agreement Assess
Payment Distribution

Business Unit WA050
Contract Number WA050_CLLPLN_TEST

Type of Assessment

Payment Plan Fee
USD

Percentage of Payment Plan

Monthly Interest Rate

Assessment Fee Split

Assessment Item Type

Add
Update/Display

Collection Agreement | Collection Agreement Assess | Payment Distribution

22. The Payment Distribution tab displays.
23. Review the data to see how the amount will be assessed over the time period with the due dates.
24. Select the Collection Agreement tab.

Collection Agreement
Collection Agreement Assess
Payment Distribution

Business Unit WA050
Contract Number WA050_CLLPLN_TEST

ID 202414487
Crawford, Lumi

Details
Find | View All
First 1-8 of 8 Last

Billing Date	Due Date	Item Amount	Item Type	Posted	Applied
12/19/2023	01/18/2024	175.87	Collection Agreement Charge	<input type="checkbox"/>	
01/19/2024	02/18/2024	175.82	Collection Agreement Charge	<input type="checkbox"/>	
02/19/2024	03/20/2024	175.82	Collection Agreement Charge	<input type="checkbox"/>	
03/19/2024	04/18/2024	175.82	Collection Agreement Charge	<input type="checkbox"/>	
04/19/2024	05/19/2024	175.82	Collection Agreement Charge	<input type="checkbox"/>	
05/19/2024	06/18/2024	175.82	Collection Agreement Charge	<input type="checkbox"/>	
06/19/2024	07/19/2024	175.82	Collection Agreement Charge	<input type="checkbox"/>	
07/19/2024	08/18/2024	175.82	Collection Agreement Charge	<input type="checkbox"/>	

Collection Agreement | Collection Agreement Assess | Payment Distribution

25. On the Collection Agreement tab, select the **Post** button.
26. You have successfully created a collection agreement.

Collection Agreement

Collection Agreement Assess

Payment Distribution

Business Unit

WA050

Contract Number

WA050_CLLPN_TEST

Calculate

ID

202414487

Lumi Crawford

First Bill Date

12/19/2023

Billing Cycle

Monthly

Post

Payments

8

Pay Plan Type

Credit Original Account

Amount

1,406.61

Account Type

PPL

Due after Days

30

Reference Number

OPTIONAL

Item Type

390000000000

Collection Agreement Charge

Adjustment Option

Do Not Adjust

Pay Item Type

690000000000

Collection Agreement

Status

Active

Details

Find | View 3

First

1-10 of 10

Last

Account Number	Item Term	Item Type	Item Amount	Balance	Reverse
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Green Fee	5.00	5.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Elearning Support	16.00	16.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Elearning Support	16.00	16.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	BIOL& 211 Lab Fee	40.74	40.74	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Technology Fee	45.00	45.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	Campus Enhancement Fee	50.00	50.00	
<input checked="" type="checkbox"/> FEE001	WINTER 2023	CHEM& 121 Lab Fee	51.77	51.77	
<input checked="" type="checkbox"/> TUT001	WINTER 2023	Resident S & A	113.30	113.30	
<input checked="" type="checkbox"/> TUT001	WINTER 2023	Resident Building	129.40	129.40	
<input checked="" type="checkbox"/> TUT001	WINTER 2023	Resident Operating	939.40	939.40	

Add

Update/Display

Collection Agreement

Collection Agreement Assess

Payment Distribution

Cancel a Collection Agreement

Navigation: NavBar > Navigator > Student Financials > Collections > Collection Agreement

1. The Collection Agreement page displays.
2. After the collection agreement has been posted to the student's account, the **Status** drop-down becomes available.
3. Select the **Status** drop-down and select **Cancelled**.
4. Select the **Post** buttons to reverse the collection agreement and return the student's account to its prior condition.

! **DO NOT** utilize the Reverse buttons. You must cancel the plan under the Status field.

Collection Agreement

Collection Agreement Assess

Payment Distribution

Business Unit

WA050

Contract Number

WA050_CLLPLN_TEST

Calculate

ID

202414487

Lumi Crawford

First Bill Date

12/19/2023

Billing Cycle

Monthly

Post

Payments

8

Pay Plan Type

Credit Original Account

Amount

1,406.61

Account Type

PPL

Reference Number

OPTIONAL

Due after Days

30

Adjustment Option

Do Not Adjust

Item Type

390000000000

Collection Agreement Charge

Status

Cancelled

Pay Item Type

690000000000

Collection Agreement

Details

Find

View All

First

1-3 of 20

Last

Account Number	Item Term	Item Type	Item Amount	Balance	Reverse
FEE001	FALL 2022	Green Fee	5.00	0.00	
FEE001	FALL 2022	Elearning Support	16.00	0.00	
FEE001	FALL 2022	Elearning Support	16.00	0.00	

Return to Search

Add

Update/Display

Collection Agreement

Collection Agreement Assess

Payment Distribution

5. You have successfully canceled a collection agreement.

Collection Agreement Communication

i This communication process uses the Update Customer Collection page in place of running the 3C Engine. Therefore, after adding the letter code, proceed to the Communication Generation page in order to print the pdf.

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

1. The Customer Collection Update search page displays.
2. Enter **Search Criteria**.
3. Select the **Search** button.
4. The Update Customer Collection page displays.
5. Select the **Collection Information** tab.
6. Add a new Activity row by selecting the **[+] plus** button if necessary, or to go to the most recent one (hit Last).
7. In the Communication section, Enter the Collection Agreement **Letter Code**. **Bx7** (BG7 for Clark).
8. Select the **Save** button.

Demographic Information | **Collection Information**

Business Unit WA140 Clark College
ID 201 Erika

Collection Activity Find | View All First 1 of 1 Last

Collection ID 2451 Activity 1 Date/Time 08/12/2019 4:38:54.000000PM

Follow Up Action

User ID CTC_BREED

Role User CS - Collector A

Next Review Date

Communication

Letter Code BG7 Collection DateTime 08/12/2019 4:38:54PM Get Communication

Checklist

Promise Date

Cash Forecast 0.00

Comments

Category

Comment

Save Return to Search

Demographic Information | Collection Information

9. The Collection Agreement Letter is assigned. (This bypasses Speedkey/Event ID and assigns based on the Business Unit Collection parameters.)
10. Continue with using the Communication Generation page as stipulated.

Run the Communication Generation Process

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

- ZC CC 3Cs User
- ZD CC 3Cs User
- ZZ CC 3Cs user

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 > Campus Community > Communications > Communication Generation

1. The **Communication Generation** run control ID search page displays.
2. Select the **Add a New Value** tab.
3. Enter **Run Control ID** (specific to Collection Agreements)
4. Select **Add**.

[Manager Self Service](#)

Communication Generation

Communication Generation

Find an Existing Value

Add a New Value

Run Control ID

Add

Find an Existing Value | Add a New Value

Selection Parameters Tab

5. The **Selection Parameters** tab displays.
6. **ID Selection:** Select the appropriate communication recipients.
 - a. "Population Selection": Allows for Selection via external file, equation, or PS Query.
 - I. ****RECOMMENDED**** For Collections use the **PS Query** - CTC_SF_PS_COMGEN_LIMIT.
With Prompt Values:
 - A. **Institution:** Wxxxx
 - B. **Limit to:** (limits number communications to process.)
7. Letter Code Selection: Pick corresponding Letter code in next section: Example "Bx4"
 - a. **Letter Code:** Select from the following letter codes, based on which communication you assigned from the 3C Engine process.
 - I. "Bx7"

i Based on the letter code selected the Template selection will display the details for the communication to be generated. The Enclosures Assigned (Soft Copy) will populate if the letter code includes them. If not, the field remains collapsed.

8. The **No Matching Template Found** section: Select an option to specify what to do if the language and method combination to use for an ID is not listed in the template list for the report name selected.
 - a. Use Default Template: Use the template set as the default inside the report ID.

- b. **Do Not Produce Communication:** Not produce the communication for an ID where no template is found.
9. **Communication Language Usage** **Alternately used for individual colleges template/verbiage**.
- a. **Specified:** Select English **Language** field.
 - b. **Preferred:** Will not display a **Language** (uses the language of selected template).
10. **Communication Method Usage:**
 - a. Select the **Specified** method.
 - b. Select the desired **Method:**
 - a. "E-Mail"
 - b. "Letter"
11. Select the **Process Parameters** tab to continue.

The screenshot displays the 'Process Parameters' tab of a software application. At the top, there are tabs for 'Selection Parameters', 'Process Parameters' (which is active), 'Email Parameters', and 'Checklist Parameters'. Below these are links for 'Run Control ID', 'WA810', 'Report Manager', 'Process Monitor', and a 'Run' button. The 'ID Selection' section features a dropdown menu currently showing 'Population Selection'. The 'Population Selection' section includes a 'Selection Tool' dropdown set to 'PS Query', an 'Edit Prompts' link, a 'Query Name' field with the text 'CTC_SF_PS_COMGEN_LIMIT', and links for 'Launch Query Manager' and 'Preview Selection Results'. The 'Letter Code Selection' section has a search bar with 'GBL SF 30 Days Past Due' and a magnifying glass icon, with a search scope of 'Administrative Function SFCO Student Financials Collections'. Below this is the 'Template Selection' section, which includes a 'Report Name' field, a 'Data Source ID' field, and a 'View Report Definition' link. A 'Template List' table is shown with 5 rows and 5 columns: Template ID, Description, Language, Method, and Default Template. The table lists various templates like 'CTCSFGBL_B04_1' through 'CTCSFGBL_B04_5' with their respective descriptions, languages (e.g., 'Pierce Language', 'Peninsula Language'), methods (all 'Letter'), and default status. Below the table is a 'Refresh Enclosure List' button. The 'No Matching Template Found' section has two radio buttons: 'Use Default Template' (selected) and 'Do Not Produce Communication'. The 'Communication Language Usage' section has two radio buttons: 'Specified' (selected) and 'Preferred', with a 'Language' dropdown set to 'English'. The 'Communication Method Usage' section has two radio buttons: 'Specified' (selected) and 'Preferred', with a 'Method' dropdown set to 'Letter'.

Template ID	Description	Language	Method	Default Template
CTCSFGBL_B04_1	PIE SF 30 Days Past Due	Pierce Language	Letter	<input checked="" type="checkbox"/>
CTCSFGBL_B04_2	PEN SF 30 Days Past Due	Peninsula Language	Letter	<input type="checkbox"/>
CTCSFGBL_B04_3	LCC SF 30 Days Past Due	Lower Columbia Language	Letter	<input type="checkbox"/>
CTCSFGBL_B04_4	OLC SF 30 Days Past Due	Olympic Language	Letter	<input type="checkbox"/>
CTCSFGBL_B04_5	CAS SF 30 Days Past Due	Cascadia Language	Letter	<input type="checkbox"/>

Process Parameters Tab

12. The **Process Parameters** tab displays.
13. **Usage Tables** section:
 - a. **Person Communication Usage:** These selections are connected to Name/Address Usage rules.
 - I. **Address:**
 - SF Email Campus, Home. Business for E-mails.
 - SF Paper Check Mailing for Letters.
 - II. **Address Name**
 - Full Name- Pri, Prf, Leg

III. Salutation

- Full Name- Pri, Prf, Leg

IV. Extra Name:

- Full Name- Pri, Prf, Leg

b. Use Preferred Email Address

- **Select** if sending via **email** and **leave unselected** for letter mailing.

14. **Joint Salutation Usage:** Leave blank.

15. **Org Communication Usage:** Leave blank.

i Usage selection for address is connected to the method being sent. For example: If the communication method is Email, an Email usage like Student Email should be selected from the drop down menu.

16. **Communication Processing Dates** section.

a. **Communication Date Range Selection:**

- From Date: **Current Date**
- To Date: **01/01/2500**

b. **Update Communication Generation Date With:** System Date (default).

c. **Update Communication Completion Date With:** System Date (default).

17. **Output Settings** section - You do not need to select any output settings for E-Mail.

a. Sort option: **Country, Postal**

- b. When you Select **Send to File**, a field will open where you can enter following file path:
- /CSTRANSFER/WA***/SFCollections/
• (where asterisks or *** = your school code #)

18. **Missing Critical Data** section:

- Select the **Produce Communication** check box.
- Uncheck the **Complete Communication** check box.

19. Select the **Email Parameters** tab to continue.

Email Parameters tab

20. The **Email Parameters** tab displays.

21. Use **only when** the communication method selected on the Selection Parameters tab is **Email**.

- From:** Enter the email address of the person or entity that is sending the email. (e.g. example@tacomacc.edu).
- Subject:** Email topic.
- Reply to:** If the student clicks Reply, this is the email address that will receive the response email.
- Sender:** Enter the email address of the person or entity that is sending the email. (e.g. example@tacomacc.edu).
- Bounce to:** If the email is undeliverable, this is the email address that will receive the email.
- In the **Importance** and **Sensitivity** group boxes, select the appropriate options.

Manager Self Service **Communication Generation**

Selection Parameters | Process Parameters | **Email Parameters** | Checklist Parameters

Run Control ID 30DayEmail Report Manager Process Monitor Run

Email Parameters

From noone@nowhere.edu
*Required if communication method usage is specific email or preferred.

Subject Collections Notification
*Required if communication method usage is specific email or preferred.

Reply to noone@nowhere.edu

Sender noone@nowhere.edu

Bounce to noone@nowhere.edu

Importance

☐ low
☒ normal
☐ high

Sensitivity

☒ normal
☐ personal
☐ private
☐ company-confidential

Save Return to Search Notify Add Update/Display

Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters

Run Com Gen and Find the Download URL

22. Select the **Run** button.

Manager Self Service **Communication Generation**

Selection Parameters | Process Parameters | **Email Parameters** | Checklist Parameters

Run Control ID 30DayEmail [Report Manager](#) [Process Monitor](#) **Run**

Email Parameters

From: noone@nowhere.edu
*Required if communication method usage is specific email or preferred.

Subject: Collections Notification
*Required if communication method usage is specific email or preferred.

Reply to: noone@nowhere.edu

Sender: noone@nowhere.edu

Bounce to: noone@nowhere.edu

Importance

☐ low
☒ normal
☐ high

Sensitivity

☒ normal
☐ personal
☐ private
☐ company-confidential

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

[Selection Parameters](#) | [Process Parameters](#) | [Email Parameters](#) | [Checklist Parameters](#)

23. The **Process Scheduler Request** page displays next.

24. **Select** the SCC_COMMGEN process.

25. Select **OK**.

Manager Self Service
Communication Generation

Process Scheduler Request

User ID CTC_BRAMIREZRun Control ID 30DayEmail

Server Name

Run Date 06/03/2019

Recurrence

Run Time 10:33:07AM

Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	SCC_COMMGEN	SCC_COMMGEN	Application Engine	Web	TXT	Distribution

OK

Cancel

26. The Communication Generation page displays.
27. Select the **Process Monitor** link.
28. The **Process List** tab displays below.
29. Select **Refresh** until **Run Status** = "Success" and **Distribution Status** = "Posted".

Process Parameters
Process Monitor

Process ListServer List

View Process Request For

User ID CTC_BRAMIRE

Type Application Engine

Last

1

Years

Refresh

Server

Name

Instance From

Instance To

Run Status

Distribution Status

☒ Save On Refresh

Process List

1-2 of 2

View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	27030834		Application Engine	SCC_COMMGEN	CTC_BRAMIREZ	06/03/2019 10:33:07AM PDT	Success	Posted	Details
<input type="checkbox"/>	27030833		Application Engine	3CEENGINE	CTC_BRAMIREZ	06/03/2019 8:11:59AM PDT	Success	Posted	Details

Go back to Communication Generation

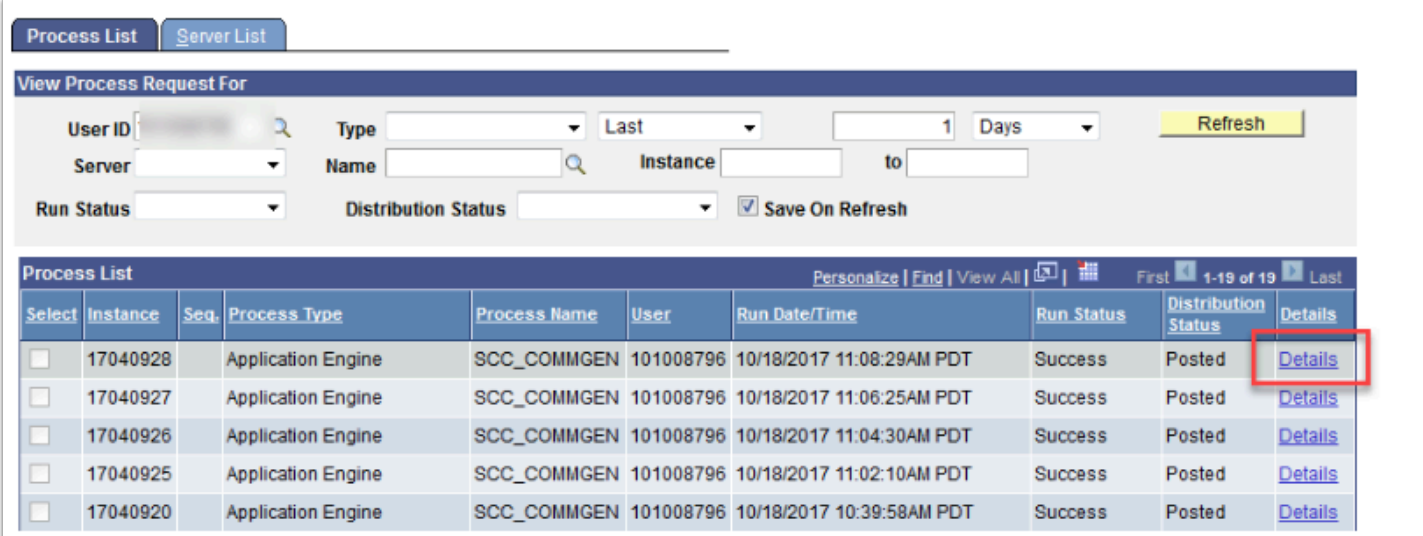
Save

Notify

Process List | [Server List](#)

💡 If the Run Status for the Communication Generation process is **Error**, review the log file to determine cause of errors. Once the error has been resolved, users **DO NOT** need to re-assign communications with the 3C Engine process. Users will want to run the Reset Communications process to clear the errors from the Process Instance and re-run the Communication Generation process to send the communications. Please refer to the [Communications-Using the Reset Communications Process](#) QRG.

30. Once success/posted displays, the next task will be to find and copy the url that will be used to down load the letters.
31. Select the **Details** link.



The screenshot shows a web application interface for managing process instances. At the top, there are tabs for 'Process List' and 'Server List'. Below these is a search and filter section titled 'View Process Request For' with fields for User ID, Type, Last, Days, Server, Name, Instance, Run Status, and Distribution Status. A 'Refresh' button is also present. The main section is a table titled 'Process List' with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains five rows of data, all with a 'Run Status' of 'Success' and 'Distribution Status' of 'Posted'. The 'Details' link for the first row (Instance 17040928) is highlighted with a red box.

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	17040928		Application Engine	SCC_COMMGEN	101008796	10/18/2017 11:08:29AM PDT	Success	Posted	Details
<input type="checkbox"/>	17040927		Application Engine	SCC_COMMGEN	101008796	10/18/2017 11:06:25AM PDT	Success	Posted	Details
<input type="checkbox"/>	17040926		Application Engine	SCC_COMMGEN	101008796	10/18/2017 11:04:30AM PDT	Success	Posted	Details
<input type="checkbox"/>	17040925		Application Engine	SCC_COMMGEN	101008796	10/18/2017 11:02:10AM PDT	Success	Posted	Details
<input type="checkbox"/>	17040920		Application Engine	SCC_COMMGEN	101008796	10/18/2017 10:39:58AM PDT	Success	Posted	Details

32. The Process Detail page displays.
33. Select the **Message Log** link.

Process Detail

Process

Instance 17040928

Type Application Engine

Name SCC_COMMGEN

Description SCC_COMMGEN

Run Status Success

Distribution Status Posted

Run

Run Control ID WA171_COMMGEN

Location Server

Server PSUNIX

Recurrence

Update Process

☐ Hold Request

☐ Queue Request

☐ Cancel Request

☐ Delete Request

☐ Re-send Content

☐ Restart Request

Date/Time

Request Created On 10/18/2017 11:08:34AM PDT

Run Anytime After 10/18/2017 11:08:29AM PDT

Began Process At 10/18/2017 11:08:50AM PDT

Ended Process At 10/18/2017 11:09:05AM PDT

Actions

[Parameters](#)

[Message Log](#)

[Batch Timings](#)

[View Log/Trace](#)

Transfer

[View Locks](#)

OK

Cancel



34. The Message Log page displays.
35. Scroll through and find the **URL** within the *Message Log* where the letter output was sent. Copy just the portion of the URL that is beyond the '*SFCollections*' notation within the URL.

i This copied portion of the URL is what will be used to download the file. The below image contains a highlighted example. Make note/copy out in order to paste into the field of the next process.

Message Log


Process

Instance: 17040928 **Type:** Application Engine
Name: SCC_COMMGEN **Description:** SCC_COMMGEN


Personalize Find View All   First 1-18 of 18 Last			
Severity	Log Time	Message Text	Explain
10	11:08:50AM	CommGen Started	Explain
	11:08:50AM	Send To File Selected	Explain
10	11:08:50AM	Validating Report Definition(s)	Explain
10	11:08:50AM	Validating Communications	Explain
	11:08:51AM	Number of communication records to process: 22	Explain
10	11:08:51AM	Generating XML Data Sources for Communications	Explain
10	11:08:54AM	Generating Communications	Explain
	11:08:58AM	Letter output sent to: /u01/app/psrepo/Interface /CSTRANSFER/WA171/SFCollections CommGen_B26_17040928_1.pdf	Explain
	11:08:58AM	Number of output files created: 1	Explain
	11:08:58AM	Number of communication records processed: 22	Explain

36. You have successfully run the communication generation process.

Checklist Parameters tab

 This tab is not used and should remain blank.

Download File for 90 Day Letters

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

- ZD FA Director
- ZD FA FISAP Prcs
- ZZ FA Aid Year Activation
- ZZ FA Award Processor
- ZZ FA CTC Reports
- ZZ FA College Bound Schlrship
- ZZ FA Direct Loan Processor
- ZZ FA Funds Manager

- ZZ FA ISIR Corrections
- ZZ FA ISIR Processor
- ZZ FA NSLDS Prcs
- ZZ FA Pell Processor
- ZZ FA SAP Prcs
- ZZ FA Verification Prcs
- ZZ FA WCG Eligibility
- ZZ SF Collections
- ZZ Upload Doc ADM
- ZZ Upload Doc ADV
- ZZ Upload Doc SR

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 > PeopleTools > CTC Custom > Extensions > Upload/Download Files

1. The **File Upload/Download** search page displays.
2. Enter **Academic Institution**.
3. Enter **Functional Area** = "Student Financials".
4. Select **Search**.

< Process List File Upload/Download

File Upload/Download

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

[Find an Existing Value](#)

▼ Search Criteria

Academic Institution begins with WA171

Functional Area begins with Student Financials

Business Process Name begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

5. The **Upload Files** tab displays.
6. Select the **Download Files** tab.

Process List

Upload Files

Upload Files

Download Files

Upload Files

Institution:

WA171

Spokane CC

Functional Area:

Student Financials

Business Process:

SF Collection Letters

File Path:

<intentionally blank>

Return to Search

[Upload Files](#) | [Download Files](#)

- The Download Files tab displays.
- Enter the **url file name** copied out of the message log from the Com Gen process.
- Select the **Download File** button.

Process List

Download Files

Upload Files

Download Files

Download Files

Institution:

WA171

Spokane CC

Functional Area:

Student Financials

Business Process:

SF Collection Letters

File Path:

/CSTRANSFER/WA171/SFCollections/

File Name:

CommGen_B26_17040928_1.pdf

Download File

Return to Search

[Upload Files](#) | [Download Files](#)

- The file is downloaded.



July 3, 2019

S WALL ST
SPOKANE, WA 99204

Dear [REDACTED]

You have agreed to a collection agreement to keep your account from being sent to an outside agency. You have agreed to pay the full arranged amount of \$123.45 over the course of 5 months. This makes your approximate agreed upon amount 24.69 for each installment, with the first installment due on July 8, 2019.

If you do not maintain the terms of this agreement and pay as arranged, you will be sent to an **outside collection agency without further notice**.

For more detail of your collection agreement, please login to ctcLink to review your account.

Clark College
Attn: Registration Department
1933 Fort Vancouver Way
Vancouver, WA 98663

11. You have successfully downloaded the file.

Check for Success via Student

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

- ZC CC 3Cs User
- ZD CC 3Cs User
- ZZ CC 3Cs User

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 > Campus Community > Communications > Person Communications > Communication Management

i Individual communications can be viewed on the Communication Management page. It will display as shown in the image below except with the parameters and dates specified based on what was entered in the steps above.

1. The Communication Management page displays.
2. The page should contain the data of the communication processed.
3. To view the message, select the **View Generated Communication** link.

Communication Management

Person Communication | Communication Recipient Data

Nico Cook ID 201071630

Communication Assignment

Assign DateTime: 06/03/2019 8:14:44AM

*Function: GEN General

*Institution: Tacoma CC

Communication Key:

*Category: BTCCC Student Financials Comm Categ

*Context: BTCCOL TC Past Due/Collections

*Method: E Email

*Direction: Outgoing Communication

Letter Code: B44 SF PD/Colt Ltr 1 TC

☐ Include Enclosures

Communication Process Details

Communication Date: 06/03/2019

Begin Time: End Time:

Comments:

Communication ID: 101007145 Kandinsky,Wasily

Department:

☐ Create Joint Communications

Communication Outcome

Communication Generation Date: 06/03/2019

☒ Communication Completed

☐ Unsuccessful Outcome

Date Activity Completed: 06/03/2019

Outcome Reason:

Language Used: English

Method Used: E-Mail

Process Used: Communication Generation

[View Generated Communication](#)

Process Instance: 27030834

Save Return to Search Previous in List Next in List Notify Add Update/Display

Person Communication | Communication Recipient Data



It is recommended that after running the Communication Generation process that users run the query CTC_COMMUNICATION_LIST_BY_DATE to verify communication completion and any unsuccessful communications.

CTC_COMMUNICATION_LIST_BY_DATE - List of Comms by Date

Institution: WA171

From Comm Date: 06/18/2017

To Comm Date: 06/28/2017

Letter: SB1

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All

ID	Institution	Comm Date	Dt Compl	Unsuccess	Outcome Reason	Letter	Descr
1 201324659	WA171	06/20/2017		N		SB1	SB Hard Letter

First 1-1 of 1 Last

4. Section complete.

Error Conditions

💡 After Calculating and Posting **leave the page**. If you linger and forget you have calculated and posted, and hit calculate and post again with the same check boxes, it will double post the charge and credit. Which makes the account messy.

If you want to add charges to a collection agreement (Parking Ticket for example), you can leave the page then come back, and charges already in collection agreement should say “Paid”.

Collection Agreement

Collection Agreement Assess

Payment Distribution

Business Unit

WA140

Contract Number

WACTC_201 CA

Calculate

ID

201

First Bill Date

08/07/2019

Billing Cycle

Monthly

Post

Payments

5

Pay Plan Type

Credit Original Account

Amount

155.66

Account Type

PPL

Reference Number

CV TEST

Due after Days

2

Adjustment Option

Do Not Adjust

Item Type

400000000000

Collection Agreement Charge

Status

Active

Pay Item Type

890000000000

Collection Agreement

Details

Find

View 3

First

1-5 of 5

Last

Account Number	Item Term	Item Type	Item Amount	Balance	Reverse
Paid FEE001	FALL 2018	Clark Online Class Fee	25.00	0.00	<input type="checkbox"/>
Paid FEE001	FALL 2018	Learning Resources Course Fee	25.00	0.00	<input type="checkbox"/>
Paid FEE001	FALL 2018	Bookstore Online Resources	50.00	0.00	<input type="checkbox"/>
Paid FEE001	FALL 2018	Technology Fee	55.66	0.00	<input type="checkbox"/>
<input type="checkbox"/> TUT001	FALL 2018	BAS Resident Operating	2,073.02	2,025.95	

Return to Search

Eligible addition to Collection Agreement

Add

Update/Disp

1. If the Collection ID on the Collection agreement Letter did not match, it would mean it was from running a prior Past Due process and a Past Due Letter would be assigned.

CTC_SF_PS_3C_COLL_PASTDUE

Business Unit:

Collection Agree Ltr CD:

Past Due 1, 2, or 3:

2. Only 2 results are produced in this example. This process can run for PstDue2 once Tmpl Assign Dt is greater than 30 days ago. (07/27/19)

Business Unit = WA140,Collection Agree Ltr CD=BG7,Past Due 1, 2, or 3=1

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

	Unit	Collection	Status	Tmpl Assign Dt	ID
1	WA140	2451	I	06/26/2019	101000883
2	WA140	2452	I	06/26/2019	101001446

Person Communication | **Communication Recipient Data**

Erika ID 201 ★

Communication Assignment

Assign DateTime: 07/24/2019 3:45:42PM

*Function: Student Financials Collections

*Institution:

Communication Key:

*Category: Collection Letter Category

*Context:

*Method: Letter

*Direction:

Letter Code: SF 30 Days Past Due WA140 ☐ Include Enclosures

Communication Process Details **Checklist Association**

Communication Date: 07/24/2019 Begin Time: End Time:

Comments: ☐ Print Comment

Communication ID:

Department:

☐ Create Joint Communications

Communication Outcome

Communication Generation Date: 07/24/2019

☒ Communication Completed Date Activity Completed: 07/24/2019

☐ Unsuccessful Outcome Outcome Reason:

Language Used:

Method Used:

Process Used:

Process Instance: 30524200

Person Communication | Communication Recipient Data

3. Process complete.