

# Assigning and Sending SF Collections Communications

**Purpose:** Use this document as a reference for assigning and sending collections communications in ctcLink.


**Audience:** College staff responsible for assigning and sending collections communications.


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

- ZC 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.


## Assigning and Sending SF Collections Communications

 Have the Credit History and Process Collections processes completed successfully? Both are necessary prior to beginning collections communications.

 The **NOPDL** or **NPDL** Service Impacts will prevent the Collections Communications being sent to a student. For more information, please refer to the [Setting Up Service Indicator Codes and Reasons QRG](#).

## Step 1: Run the 3C Engine

 Running the 3C Engine will assign the PeopleSoft Communication to students defined in the population selected by the process.

 The best practice is to use a different Run Control ID for each 30, 60 and 90 day process because the set parameters will be different for each.

1. The **3C Engine** run control ID 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., WA080\_3C\_30\_DAY (Institution, Process Name, Description)


## 3C Engine Parameters Tab

3. The Run 3C Engine page displays and the 3C Engine Parameter tab defaults.
4. Select the **Population Selection** checkbox in the **Process 3Cs** section. This will expand the page with additional sections:
  - A. **Event Selection**
  - B. **Population Selection**
5. The **Process Joint Records** section defaults to **No Joint Processing**. Leave this checkbox selected.
6. **Event Selection** (select based on parameters given for specific communication):
  - A. **Academic Institution**: Input or Look Up.
  - B. **Administrative Function**: SFCO (GEN for Tacoma)
  - C. **Event ID**: Select from the following based on which letter you are sending:
    - I. **B\_GBL\_B04** for 30 days past due communications (Clark is BCLBG4).
    - II. **B\_GBL\_B05** for 60 days past due communications (Clark is BCLBG5).
    - III. **B\_GBL\_B06** for 90 days past due communications (Clark is BCLBG6).
7. **Population Selection**:
  - A. Select **PS Query** and use query name **CTC\_SF\_PS\_3C\_COLL\_PASTDUE**.
  - B. The Edit Prompts link appears.
  - C. Select **Edit Prompts**.
  - D. The **Query Prompts** pagelet displays.
  - E. Input required prompt values:
    - I. Business Unit
    - II. Collection Agree Ltr CD: This field is designed to exclude anyone that may have a current Collections Agreement. Please enter **B07 (Global) (Clark is BG7)**.
    - III. Past Due Letter 1, 2, or 3:

- a. **1:** 0-30 days active in Collection Module = typically 31-60 days past due.
- b. **2:** 31-60 days active in Collection Module = typically 61-90 days past due.
- c. **3:** 61-90 days active in Collection Module = typically 91-120 days past due.

IV. Select the **OK** button.

F. The 3C Engine Parameters page displays.

 The "**Collection Agree Ltr CD**" prompt in the query prompt pagelet is an exclusion criteria. This way if someone has already agreed to a collection agreement and has been sent a **B07 (BG7)**, then they will not be sent further past dues as they have acknowledged they are past due and have made an agreement to bring their account current.

- 8. Select the **Preview Selection Results** link to ensure that student data is being processed.  
Select the **Return** button.
- 9. The 3C Engine Parameters tab page displays.

## 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 [3C Engine Parameters Tab](#). This link will open in a new tab/window.


## Manage Duplicate Assignment Tab

- 10. Select the **Manage Duplicate Assignment** tab and the Manage Duplicate Assignment page displays.
- 11. Under the Duplicate Communication Check section:
  - A. Select **Check Duplicate Communication** checkbox.
    - I. Beneath the Additional Conditions to Prevent Duplicate Communication section, select:
      - a. Variable Data: **Match**.
      - b. Communication Status: **leave blank**.

12. Under the Duplicate Checklist Check section:
  - A. Select **Check Duplicate Checklist** checkbox.
  - B. Leave the **Variable Data** and **Checklist Status** field blank.
13. Select the **Run** button.
14. The **Process Scheduler Request** page displays.
15. Select the box next to the **3C Engine** in the Process List section.
16. Select the **OK** button.
17. Please refer to the [Process Schedule Request](#) steps for further instructions.
18. Section complete.

 This will prevent a duplicate assignment of the communication for the specific collection instance (Collection ID). If you select a status of completed or not completed it will only prevent assigning the communication for those that have a completed or not completed status.

If a Variable Data condition is also specified, then the variable data and communication status conditions must both be met to prevent assignment of the duplicate communication.

 A Communication can be in COMPLETED status but the process could have been unsuccessful due to other errors in the processing. After running both the 3C Engine Process AND the Communication Generation process, it is recommended to run the query CTC\_COMMUNICATION\_LIST\_BY\_DATE to review any unsuccessful communications.

## Video Tutorial

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## Video Tutorial via Panopto

View the external link to [Manage Duplicate Assignment Tab](#). This link will open in a new tab/window.

## Step 2: 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: Campus Community > Communications > Communication Generation

1. The **Communication Generation** run control ID 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).

## Selection Parameters Tab

3. The Selection Parameters tab displays.
4. Under the **ID Selection** section, select the appropriate communication recipients:
  - A. **Population Selection:** (Recommended) Allows for Selection via external file, equation, or PS Query.
  - B. All IDs: All person and corporate IDs system wide. (**Do Not Use** this option as you may send communications for other schools).

- C. All Org ID's: All corporate ID's system wide. (**Do Not Use** this option as you may send communications for other schools).
  - D. All Person IDs: All person IDs system wide. (**Do Not Use** this option as you may send communications for other schools).
  - E. **One Org ID**: Opens a box to input a single Corporate ID.
  - F. **One Person ID**: Opens a box to input a single Person ID.
5. When you have chosen the Population Selection option from the previous step:
- A. Under the Population Selection section, select the **Selection Tool** drop-down and choose **PS Query**.
  - B. Enter or search for the **Query Name CTC\_SF\_PS\_COMGEN\_LIMIT**.
  - C. Select the Edit Prompts link and enter the:
    - I. **Institution**: WAXxx.
    - II. **Limit to**: (limits number of communications to process).
    - III. **Letter Code**: Select from the following letter codes, based on which communication you assigned from the **3C Engine** process:
      - a. Bx4: PD/Coll Ltr 1 SF (30 Days)
      - b. Bx5: PD/Coll Ltr 2 SF (60 Days)
      - c. Bx6: PD/Coll Final SF (90 Days)
    - IV. Select the **OK** button.
  - D. Select the Preview Selection Results link to ensure that student data is being processed. Select the **Return** button.

 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.

- 6. Under the **Letter Code Selection** section, enter or search for the appropriate **Letter Code**. This should match the letter code from the Run 3C process and from the previous step (5.A.III).
- 7. Under 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**: Does not produce the communication for an ID where no template is found.
- 8. Under the **Communication Language Usage** section, select the **Preferred** checkbox.
- 9. Under the **Communication Method Usage** section, select:
  - A. The **Specified** checkbox.
  - B. Select the **Method** drop-down and choose:
    - I. **E-Mail**: Your college will be emailing this communication to the students.
    - II. **Letter**: Your college will be mailing this communication to the students.

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## Video Tutorial via Panopto

View the external link to [Selection Parameters Tab](#). This link will open in a new tab/window.

## Process Parameters Tab

10. Select the **Process Parameters** tab.
11. The Process Parameters tab displays.
12. **Under the Usage Tables** section:
  - A. **Person Communication Usage:** These selections are connected to Name/Address Usage rules. Select the drop-down of each field and enter:
    - I. **Address:**
      - a. SF Email Campus, Home. Business for E-mails.
      - b. SF Paper Check Mailing for Letters.
    - II. **Address Name**
      - a. Full Name- Pri, Prf, Leg.
    - III. **Salutation**
      - a. Full Name- Pri, Prf, Leg.
    - IV. **Extra Name:**
      - a. Full Name- Pri, Prf, Leg.
    - V. Select the **Use Preferred Email Address** checkbox if you are sending the communication via email. If you are sending a letter, leave it unchecked.
  - B. **Joint Salutation Usage:** Leave blank.
  - C. **Org Communication Usage:** Select the drop-down of each field and enter:
    - I. **Org Recipient: All Cntc, All Dept, All Loc.**
    - II. **Contact Name: Full Name - Pri, Prf, Leg.**

 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.

13. Under the **Communication Processing Dates** section:
  - A. **Communication Date Range Selection:**
    - I. **From Date: *Current Date*.**
    - II. **To Date: 01/01/2500.**
  - B. **Update Communication Generation Date With: System Date** (default).
  - C. **Update Communication Completion Date With: System Date** (default).
14. Under the **Output Settings** section: (*You do not need to select any output settings for E-Mail*)
  - A. Select the **Sort Option** drop-down and select: **Country, Postal**
  - B. Select the **Send to File** checkbox
    - I. The **File Path** field will open. Enter following file path:
      - a. **/CSTRANSFER/WA\*\*\*/SFCollections/**
        - (asterisks (\*\*\*) = your school code)
15. Under the **Missing Critical Data** section:
  - A. Select the **Produce Communication** check box.
  - B. Uncheck the **Complete Communication** check box.

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## Video Tutorial via Panopto

View the external link to [Process Parameters Tab](#). This link will open in a new tab/window.

## Email Parameters tab

16. Select the **Email Parameters** tab and the **Email Parameters** tab displays.
17. Use only when the Communication Method Usage selected on the Selection Parameters tab is Email.



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

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View the external link to [Email Parameters Tab](#). This link will open in a new tab/window.


## Checklist Parameters tab

- 18. This tab is not used and should remain blank.

## Run Com Gen and Copy the File Path

- 19. Select the **Run** button.
- 20. The Process Scheduler Request page displays next.
- 21. Select the **SCC\_COMMGEN** process and then select the OK button.
- 22. Please refer to the [Process Schedule Request](#) steps for further instructions.
- 23. If you are sending a **Letter**, please scroll through and find the **File Path** 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.
- 24. Section complete.

 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.

 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.

## 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 [Run Com Gen and Copy File Path](#). This link will open in a new tab/window.

## Step 3: Download File for 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: PeopleTools > CTC Custom > Extensions > Upload/Download Files**

1. The **File Upload/Download** search page displays.
2. Enter the:
  - A. **Academic Institution.**
  - B. **Functional Area: Student Financials**
  - C. **Business Process Name: SF Collections**
3. Select the **Search** button.
4. The Upload Files tab displays.
5. Select the **Download Files** tab.
6. The **Download Files** page displays.
7. Enter the url file name copied out of the message log from the Com Gen process into the File Name field.
8. Select the **Download File** button.
9. Process complete.

## 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.

## View Tutorial Via Panopto


View the external link to [Download File for Letter](#). This link will open in a new tab/window.

## Verify 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.

 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.

### Navigation: Campus Community > Communications > Person Communications > Communication Management

1. The Communication Management search page displays.
2. Enter the **ID** number and select the **Search** button.
3. Select the link to the **SFCO** communication that was generated from this process. The Person Communication tab displays.

4. Under the **Communication Outcome** section, select the **View Generated Communication** link and the View Communication page displays.
5. Select the **View** button.
6. Process complete.

 When the time comes to make updates to this statement, please submit a ticket to SF Customer Support with a copy of the desired changes/as much detail as possible. All template updates/adjustments need to have a ticket submitted.

## 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 [Verify Success via Student](#). This link will open in a new tab/window.