

Assign and Cancel a Student from a Third Party Contract

Purpose: Use this document as a reference for how to link and cancel a student from a third party contract in ctLink.

Audience: Student Financials staff.

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

- ZD SF Third Party Contracts
- ZZ SF Third Party Contracts

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

Assign a Student to a Third Party Contract

Navigation: Student Financials > Payment Plans > Third Party Contract > Assign

1. The **Third Party Contract** search page displays.
2. Enter Business Unit and additional **Search Criteria** for the contract.
3. Select the **Search** button and the **Assign Students to Third Party** page displays.
4. Within the **Assign Students** section:
 - A. Enter or search for the **ID** number.
 - B. Enter or adjust the **Student Max**.
 - C. Ensure the **Status** drop-down is set to active.
 - D. *Optional:* Adjust the **Priority** number (the default is 999999).
 - *Note:* This is only required when the student will be assigned to multiple contracts. The lower the priority, the higher the priority.
 - E. *Optional:* Select the **Additional Details** hyperlink and the **Student Contract Details** page displays.
 - I. Use the **Reference Nbr** field to display information on the TPC_REF invoice template.
 - II. Select the **OK** button and the Assign Students to Third Party page displays.
 - F. Select the **Post** button.
 - G. *Optional:* Select the **Add a New Row** button **[+]** to add multiple students. Repeat steps 4A through 4E.
 - To remove a student, select the **Remove a Row** button **[-]**.

5. Select the **Save** button.
6. Process complete.

Assign Students to Third Party

Business Unit	Contract Number	EXAMPLE
External Org ID	Status	Active
Contract Maximum	Total Charges	0.00 USD
Date Type		
Term		

Assign Students

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*ID	Student Max	Status	Priority	
Course List <input type="text" value=""/> <input type="button" value="Q"/>	<input type="text" value=""/> USD	Active <input type="button" value="v"/>	<input type="text" value="999999"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Additional Details				<input type="button" value="Post"/>

Corporate Accounts

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 [Assign a Student to a Third Party Contract](#). This link will open in a new tab/window.

Cancel a Student from a Third Party Contract

Navigation: Student Financials > Payment Plans > Third Party Contract > Assign

1. The **Third Party Contract** search page displays.
2. Enter **Business Unit** and additional **Search Criteria** for the contract.
3. Select the **Search** button and the **Assign Students to Third Party** page displays.
4. Within the **Assign Students** section, search for the Student utilizing the search or navigation bar.
5. Select **Cancelled** from the **Status** drop-down field and the **Reversal Detail** page will display.

- A. Enter or search for the **Item Effective Date**.
 - B. *Optional*: Enter the **Description**.
 - C. Enter or search for the **Reason** code.
 - D. Select the **OK** button and the Assign Student to Third Party page displays.
6. Select the **Post** button.
 7. Repeat steps 3 through 6 as necessary.
 8. Select the **Save** button.
 9. Process complete.

Assign Students to Third Party

Business Unit	WA010	Contract Number	EXAMPLE
External Org ID	000144922	Status	Active
Contract Maximum	999,999.00 USD	Total Charges	5,095.10 USD
Date Type	Term		
Term	2241 WINTER 2024		

Assign Students Q | << 1-2 of 2 >> | View All

*ID Course List	Student Max	Status	Priority	
201270248 <input type="text"/> White, Toni	10,000.00 USD	Active	999999	+ -
<input type="text"/>	Additional Details			Post
201584410 <input type="text"/> Rogers, Madison	10,000.00	Cancelled	999999	+ -
<input type="text"/>	Additional Details			Post

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