SF Collections End-to-End Checklist

Purpose: Use this document as a reference for the collections process within Student Financials in ctcLink.

Audience: Student Financials staff.

- Steps 1 through 4: These steps vary by task and some can be integrated into later steps.
- Steps 5 through 6: These steps are the actual steps of processing through the ctcLink Collections module.
- Step 7: This step sends collections communications based on previous steps.
- Steps 8 through 9: These steps are follow-up actions that may occur based on your internal collections business process.

☐ 1. Message Center - Tuition Due Reminder Notice

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☐ 2. Enrollment Cancellation - Drop for Non-Payment

- Enrollment Cancellation - Drop for Non-Payment
  - Enrollment Cancellation Population (aka Drop for Non-Payment)
- Message Center - Drop for Non-Payment Notice

☐ 3. Generate Student Statements

- Generate Student Statements

☐ 4. Assign Service Indicators

- Mass Assign/Release SF Service Indicators Based on Amount Past Due (B01)
- Entering Service Indicator Data

☐ 5. Process and Review Credit History

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☐ 6. Put Students in Collections

- Process Batch Collections
- Put an Individual Student in Collections

☐ 7. Send Collections Communications

> Don't forget to send your 30, 60, and 90 day communications!

- Assigning and Sending SF Collections Communications
- Sending Communications
- Message Center - Collections Letters

☐ 8. Create an Internal Collection Agreement

- 9.2 Creating a Collection Agreement (OLD)

☐ 9. Process Student Write-Offs

- Process Student Write-Offs