# **Exclude Item Types or Nodes from a 3rd Party Contract**

**Purpose:** Use this document as a reference for how to remove a single item type (or more) from a Tree Node for 3rd Party Contracts.

Audience: SF Staff, 3rd Party Contract 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.

When setting up 3rd Party Contracts, it may be necessary to exclude a specific charge from a Tree Node so that it is not paid. Instead of reorganizing your item types via the Tree Manager, it is much easier to simply tell specific ctcLink 3rd Party Contract to exclude such charges from out of the charge group (or Tree Nodes.)

Once students have been assigned to the contract, you will be unable to remove Tree Nodes from a contract. This process allows you to exclude Item Types or Tree Nodes after a student has been assigned, allowing you to save time to remove the unwanted Item Type/ Tree Nodes.

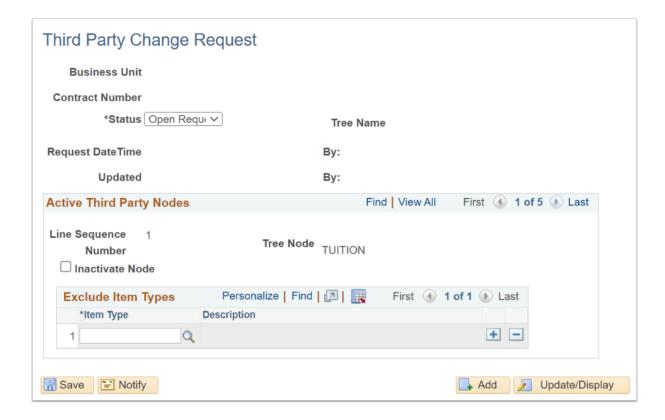
This item type exclusion process requires two different ctcLink pages (*Contract Node Change Request* & *Process Node Change Request*.)

# **Contract Node Change Request**

Navigation: Student Financials > Payment Plans > Third Party Contract > Contract Node Change Request

- 1. The **Third Party Change Request** search page displays.
- Select the Add New Value Tab.

- Enter the Business Unit.
- 4. Enter or search for the **Contract Number**.
- 5. Select the **Add** button and the Third Party Change Request page displays.
- 6. Ensure **Open Request** is populated in the **Status** drop-down field.
- 7. Within the **Active Third Party Nodes** section:
  - A. Utilizing the **Find**, **View All**, or **Navigation** buttons [<] / [>], locate the appropriate **Line Sequence** number that houses the Tree Node(s) needing adjustment.
  - B. If the entire Tree Node needs to be excluded from the Third Party Contract, select the **Inactivate Node** checkbox.
  - C. If one or multiple Item Types need to be excluded from the Tree Node, within the **Exclude Item Types** section:
    - I. Enter or search for the **Item Type**.
    - II. Select the **Add a New Row** button [+] to add multiple **Item Types**.
      - a. Select the **Remove a Row** button [-] to delete a row.
- 8. Repeat Step 7 as necessary.
- 9. Select the **Save** button.
- 10. Section 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.

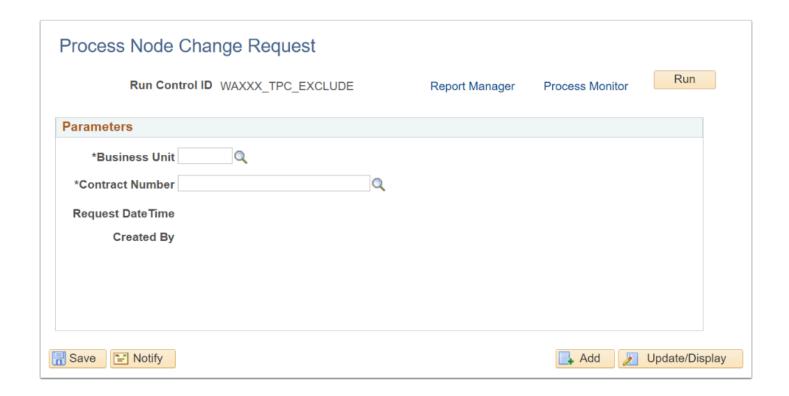
### **View Tutorial Via Panopto**

View the external link to <u>Contract Node Change Request</u>. This link will open in a new tab/window.

# **Process Node Change Request**

# Navigation: Student Financials > Payment Plans > Third Party Contract > Process Node Change Request

- 1. The **Process Node Change Request** 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 <u>Run Control IDs</u> 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).
- 3. The **Process Node Change Request** page displays.
- 4. Enter the **Business Unit**.
- 5. Enter or search for the **Contract Number**.
- 6. Select the **Run** button.
- 7. Section Complete. Please refer to the <u>Process Schedule Request</u> steps for further instructions.



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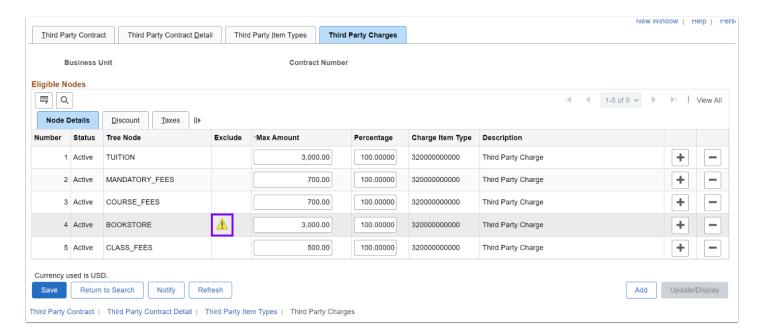
View the external link to <u>Process Node Change Request</u>. This link will open in a new tab/window.

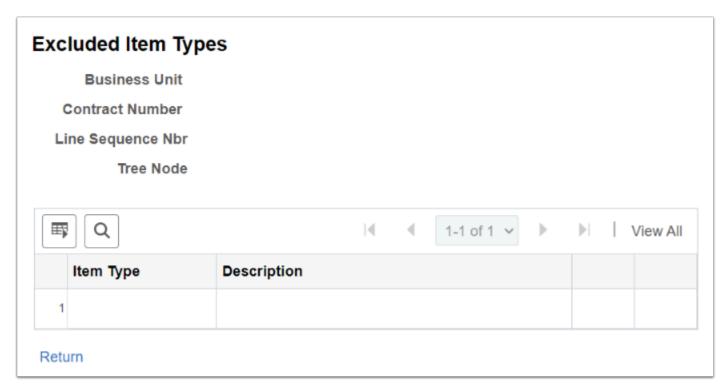
# Validate Exclusion(s) from a Contract

#### Navigation: Student Financials > Payment Plans > Third Party Contract > Create

- 1. The **Third Party Contract** search page displays.
- 2. Enter the Business Unit.
- 3. Enter the **Contract Number** (from above).
- 4. Select the **Search** button and the Third Party Contract tab displays.

- 5. Select the **Third Party Charges** tab.
- 6. On the adjusted Sequence Number Line, there will be a yellow triangle with an exclamation mark inside of it. Select this image and the Excluded Item Types page displays.
- 7. Process complete.





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# **View Tutorial Via Panopto**

View the external link to <u>Validate Exclusion(s) from a Contract</u>. This link will open in a new tab/window.