


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.
2. Select the **Add New Value Tab**.

3. 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.

Third Party Change Request

Business Unit

Contract Number

*Status Open Requi

Tree Name

Request DateTime

By:

Updated

By:

Active Third Party Nodes

Find | View All

First 1 of 5 Last

Line Sequence 1

Number

Tree Node TUITION

☐ Inactivate Node

Exclude Item Types

Personalize | Find |

First 1 of 1 Last

*Item Type	Description
1	

+

-

Save

Notify

Add

Update/Display

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 [Contract Node Change Request](#). 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 [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).
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 [Process Schedule Request](#) steps for further instructions.

Process Node Change Request

Run Control ID WAXXX_TPC_EXCLUDE

Report Manager

Process Monitor

Run

Parameters

*Business Unit

*Contract Number

Request DateTime

Created By

Save

Notify

Add

Update/Display

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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.

Third Party Contract

Third Party Contract Detail

Third Party Item Types

Third Party Charges

Business Unit

Contract Number

Eligible Nodes

Q

1-5 of 5


View All

Node Details

Discount

Taxes

||>

Number	Status	Tree Node	Exclude	Max Amount	Percentage	Charge Item Type	Description		
1	Active	TUITION		3,000.00	100.00000	3200000000000	Third Party Charge	+	-
2	Active	MANDATORY_FEES		700.00	100.00000	3200000000000	Third Party Charge	+	-
3	Active	COURSE_FEES		700.00	100.00000	3200000000000	Third Party Charge	+	-
4	Active	BOOKSTORE		3,000.00	100.00000	3200000000000	Third Party Charge	+	-
5	Active	CLASS_FEES		500.00	100.00000	3200000000000	Third Party Charge	+	-

Currency used is USD.

Save

Return to Search

Notify

Refresh

Add

Update/Display

Third Party Contract | Third Party Contract Detail | Third Party Item Types | Third Party Charges

Excluded Item Types

Business Unit

Contract Number

Line Sequence Nbr

Tree Node

Q

1-1 of 1

View All

	Item Type	Description		
1				

Return

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View Tutorial Via Panopto

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