

Department	
Responsibility/Role	
File Name	4_Begin Collections_SPD_20141212110221
Revision	
Document Generation Date	12/12/2014 11:02:00 AM
Date Modified	12/16/2014 10:07:00 AM
Last Changed by	ctbrand2 12/12/2014
Status	

4_Begin Collections

Trigger:

Required Field(s)	Comments

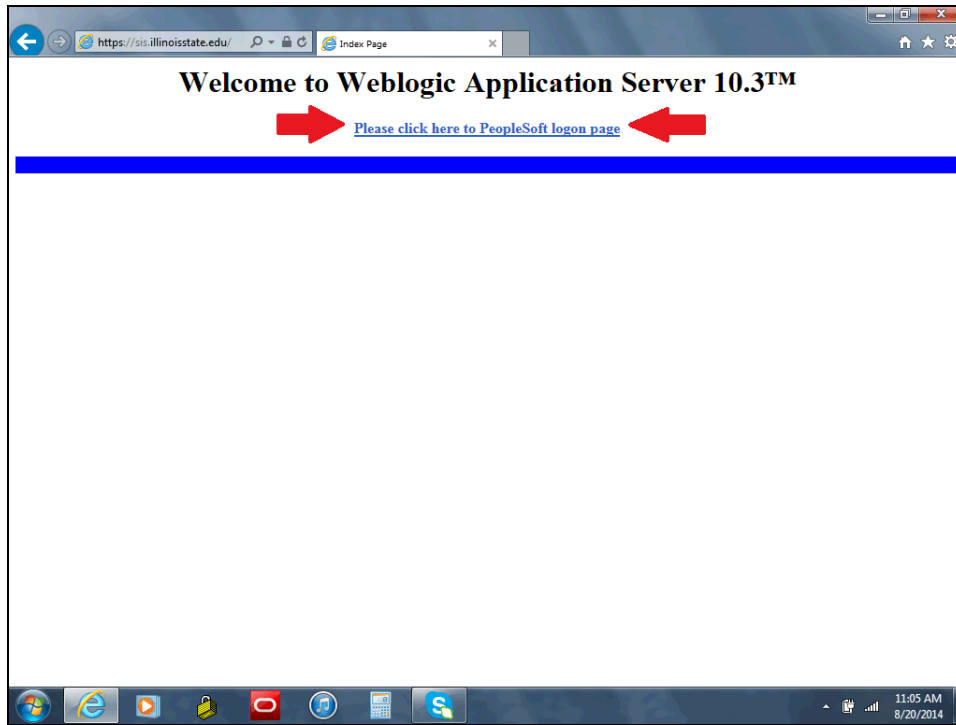
Output - Result(s)	Comments

Additional Information

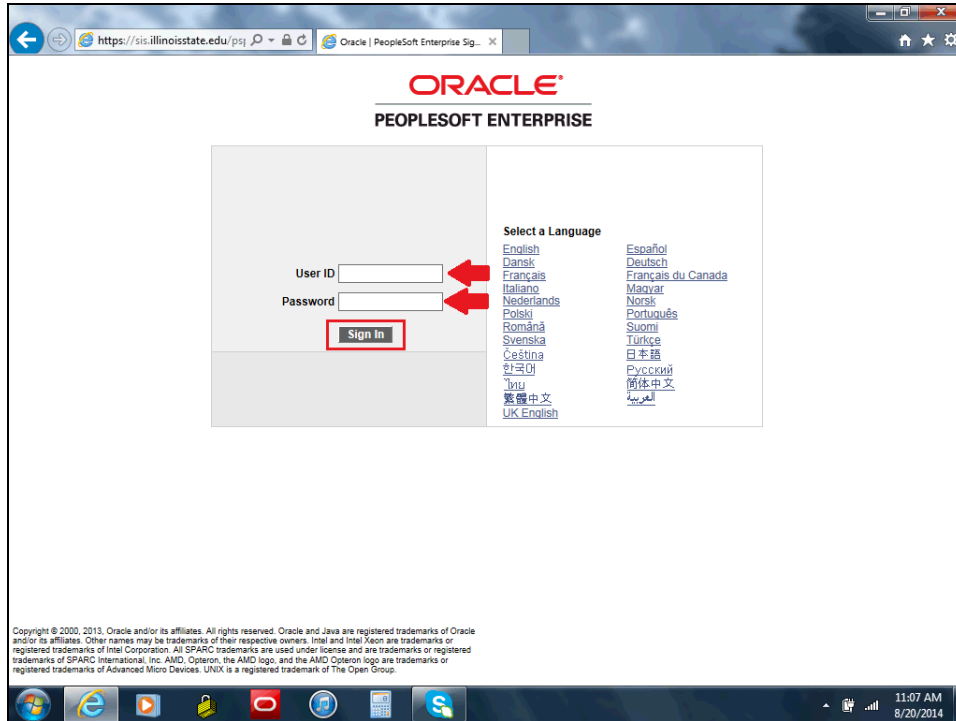
Procedure

In this topic, you will learn how to **Begin the collection process for a student.**

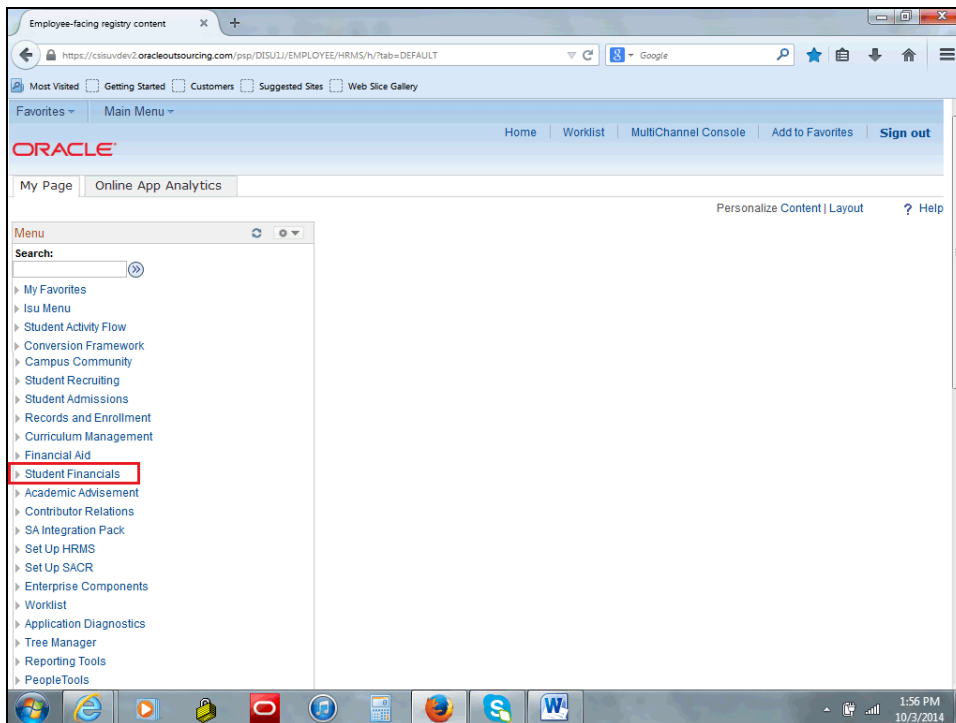
Step	Action
1.	After collection items are assigned to the appropriate worklists, the collectors can begin working each item. Note: ISU will be using this screen as the first touch for a student that has recently been moved into collections.



Step	Action
2.	To sign in to Campus Solutions, go to sis.illinoisstate.edu. Click the Please click here to PeopleSoft logon page link.



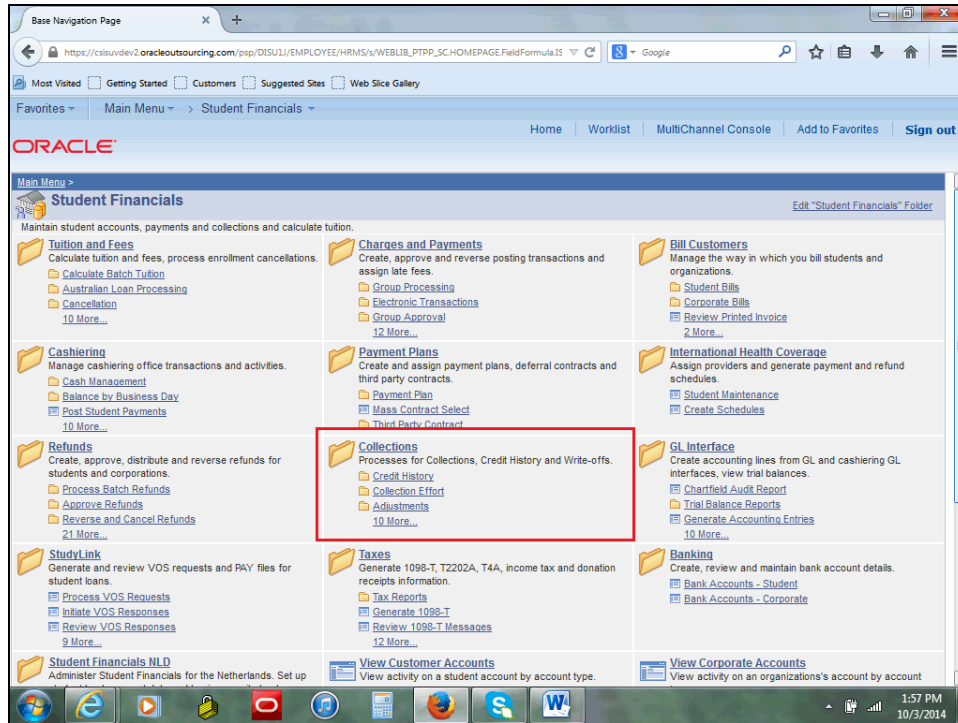
Step	Action
3.	<p>You will be directed to the Campus Solutions logon screen.</p> <p>Enter your User ID and Password then click the Sign In button.</p>



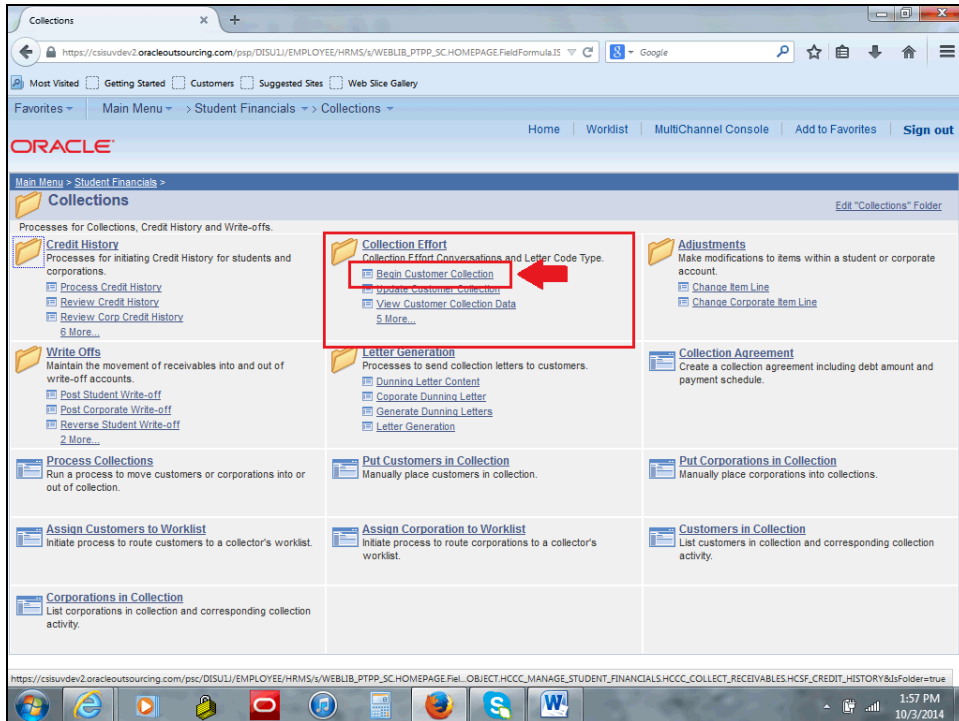
System Process Document

4_Begin Collections

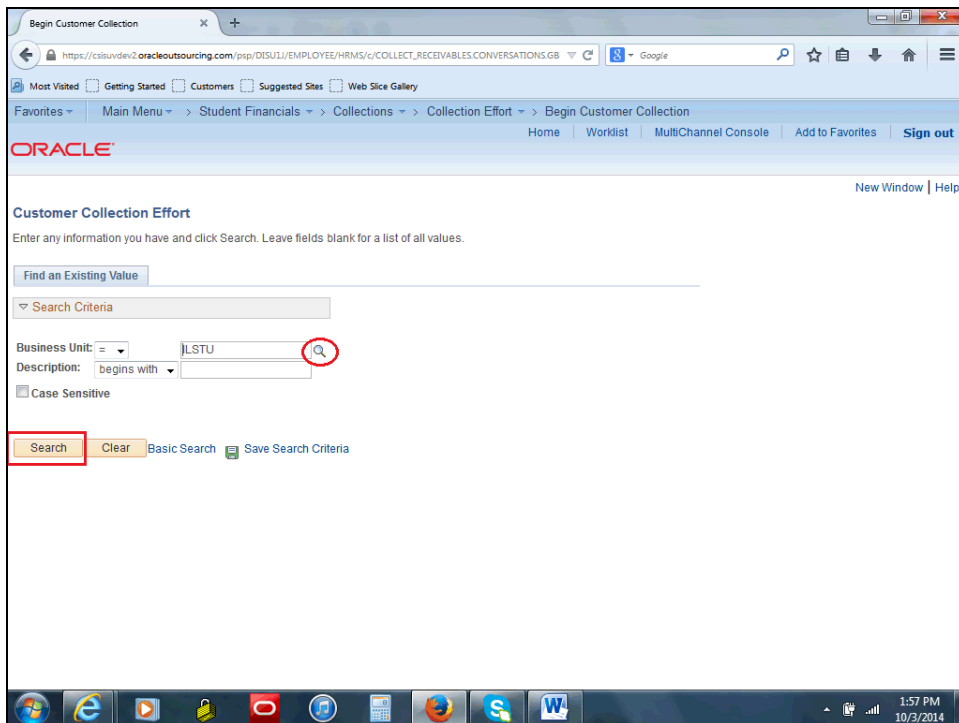
Step	Action
4.	<p>Once you sign in, you will see a list of navigation links that relate to your roles and responsibilities.</p> <p>Collections is within Student Financials menu.</p> <p>Click the Student Financials link.</p>



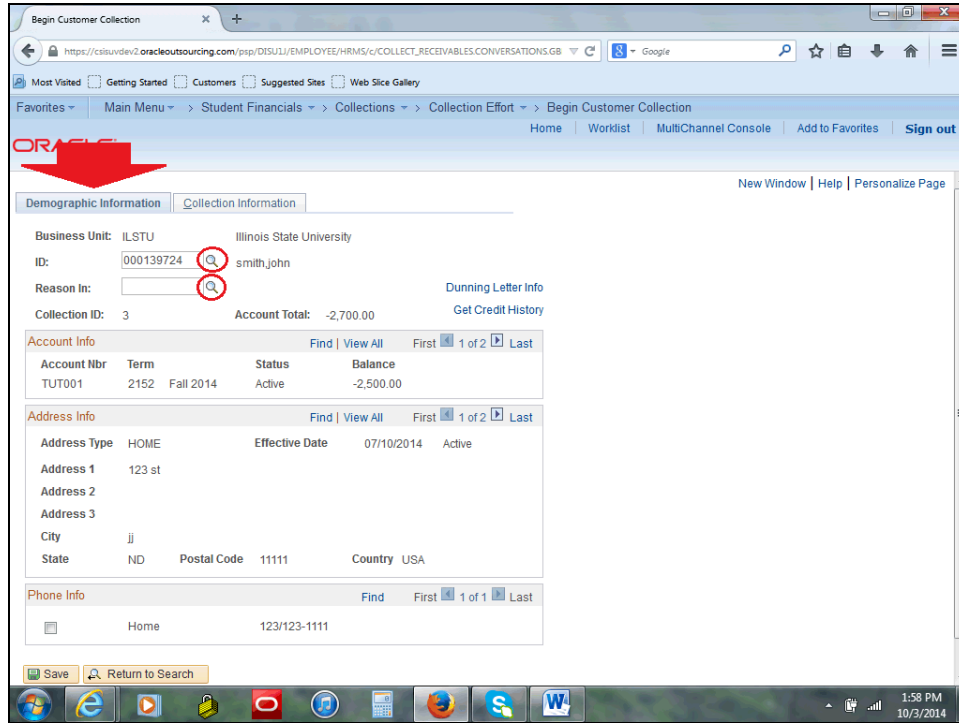
Step	Action
5.	<p>Collection Effort folder is within the Collections folder.</p> <p>Click the Collections folder.</p>



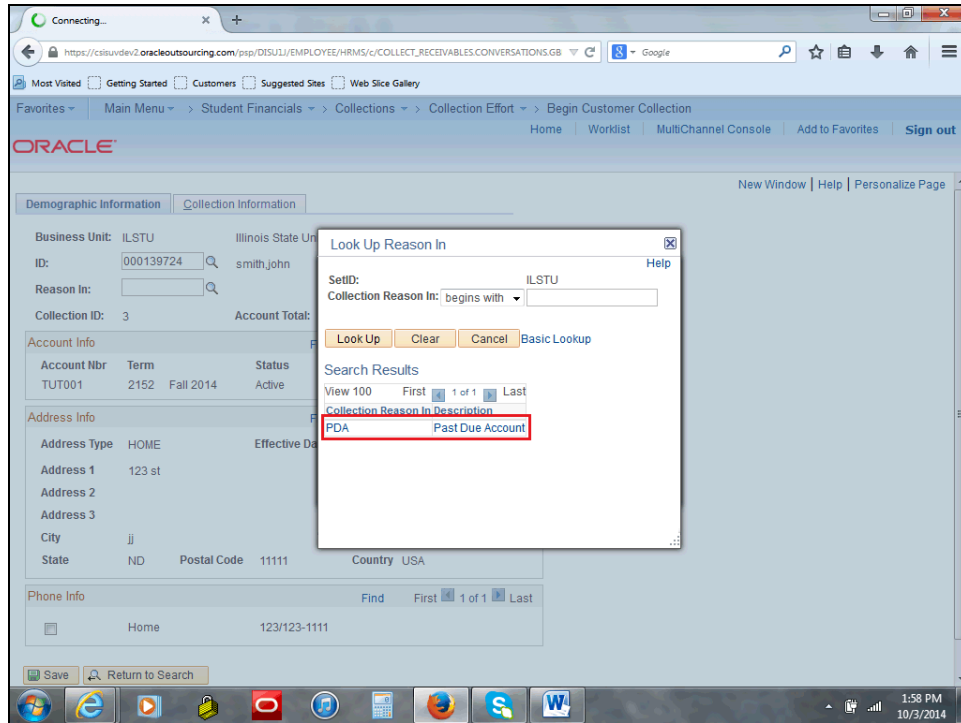
Step	Action
6.	<p>Begin Customer Collection is within the Collection Effort folder.</p> <p>Click the Begin Customer Collection link.</p>



Step	Action
7.	Click the Business Unit Look Up button and select ILSTU from the list. Click the Search button.



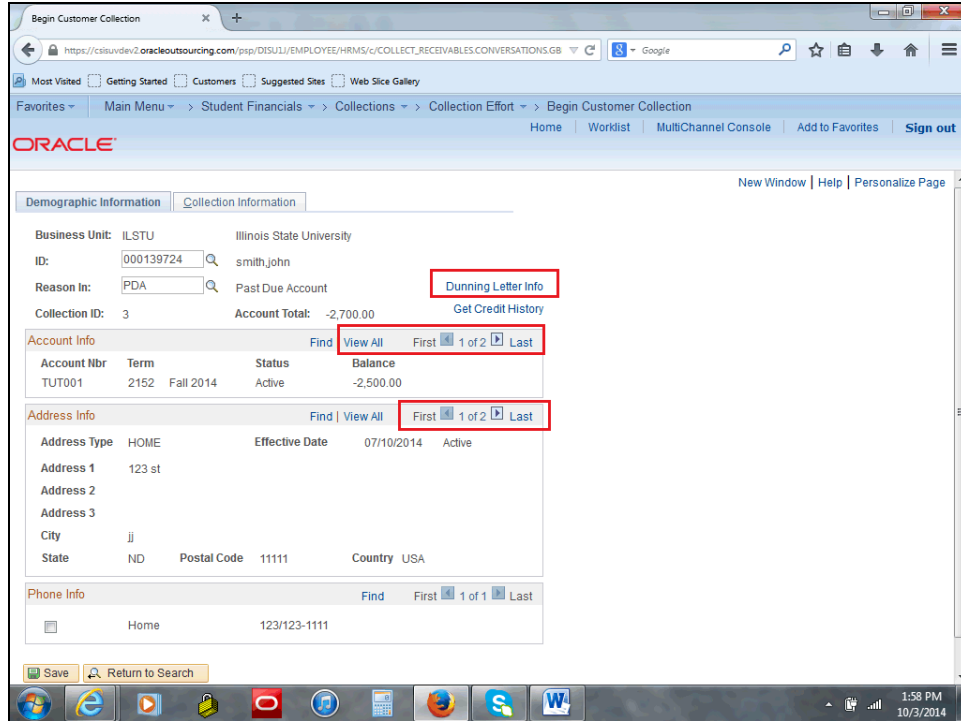
Step	Action
8.	From the Demographic Information tab: Click the ID Look Up button and select a student from the list. Click the Reason In Look Up button.



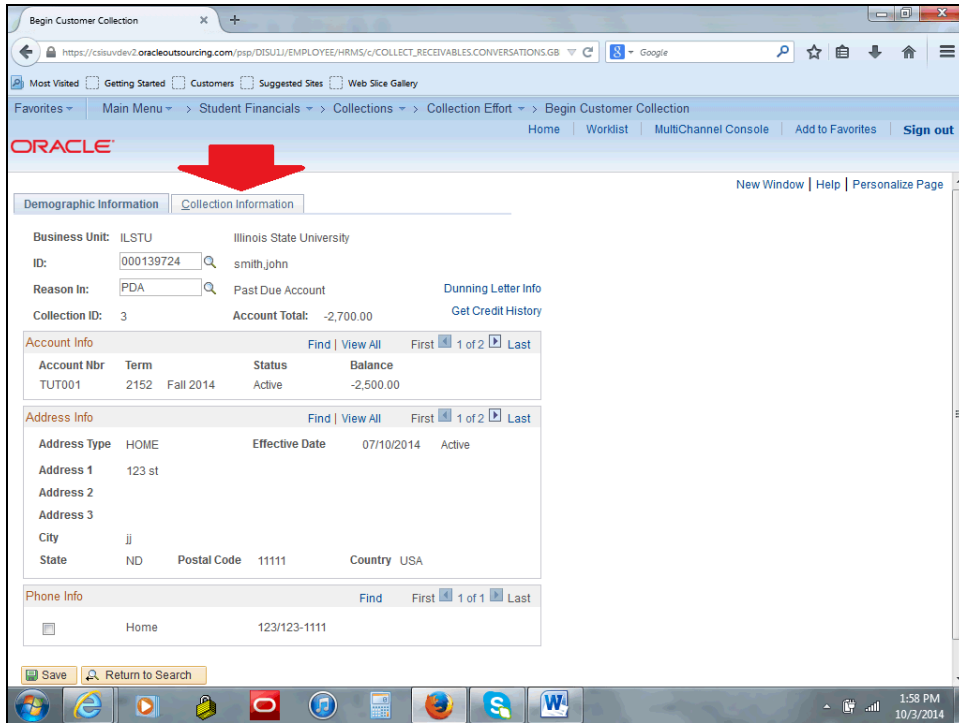
Step	Action
9.	<p>Select PDA_Past Due Account link from the search results.</p> <p>Note: At Illinois State University, the Reason In field will be prepopulated from the process run to put the student into collections.</p>

System Process Document

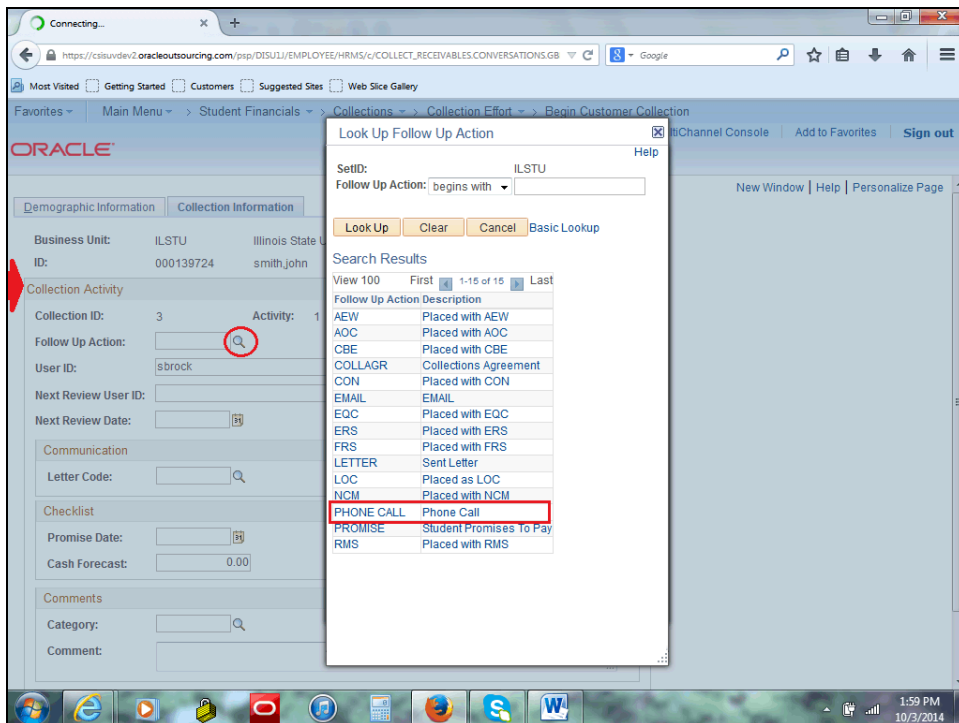
4_Begin Collections



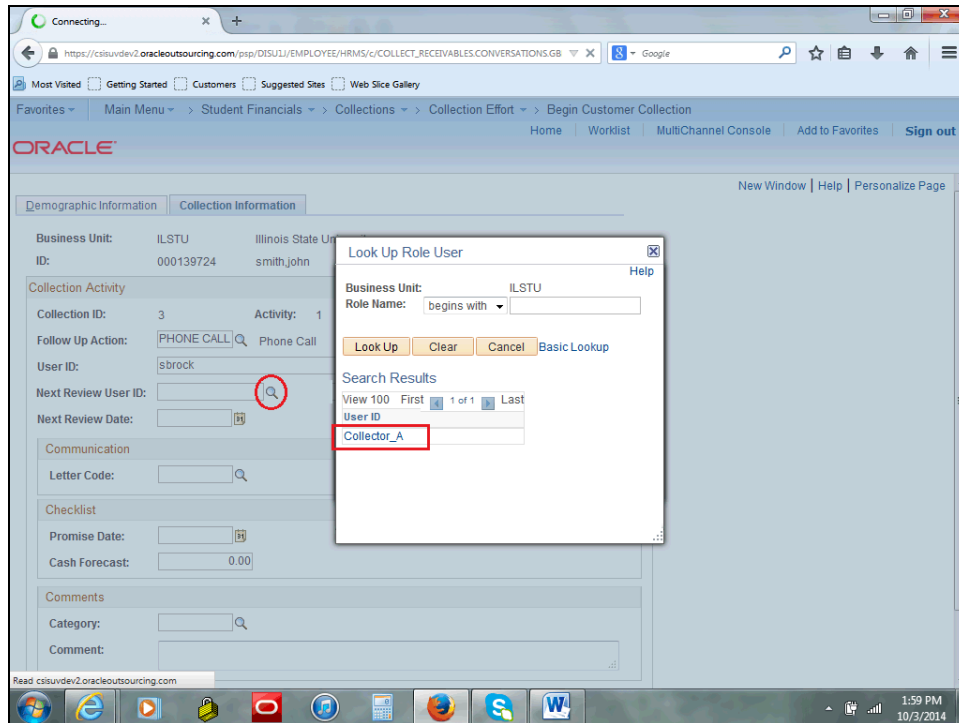
Step	Action
10.	<p>The student's information will be displayed.</p> <p>Click the First/Last arrows or click the View All link to display all lines.</p> <p>Click the Dunning Letter Info link to view the letter information if desired.</p> <p>Note: Illinois State University does not have a Dunning Letter set up yet. It has not been determined whether we will be using this functionality.</p>



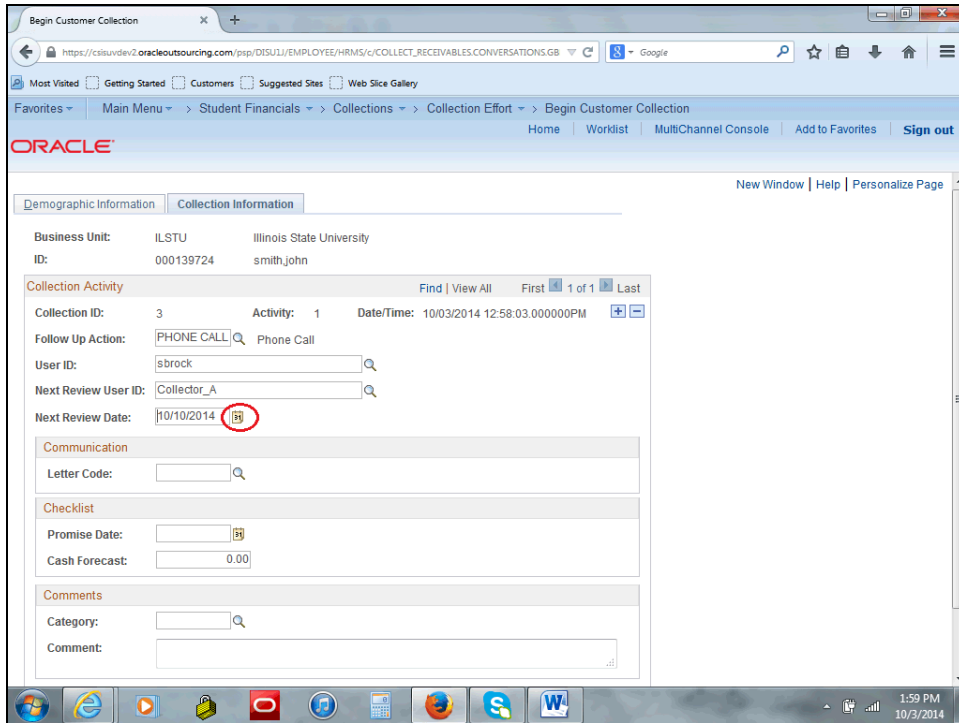
Step	Action
11.	Click the Collection Information tab.



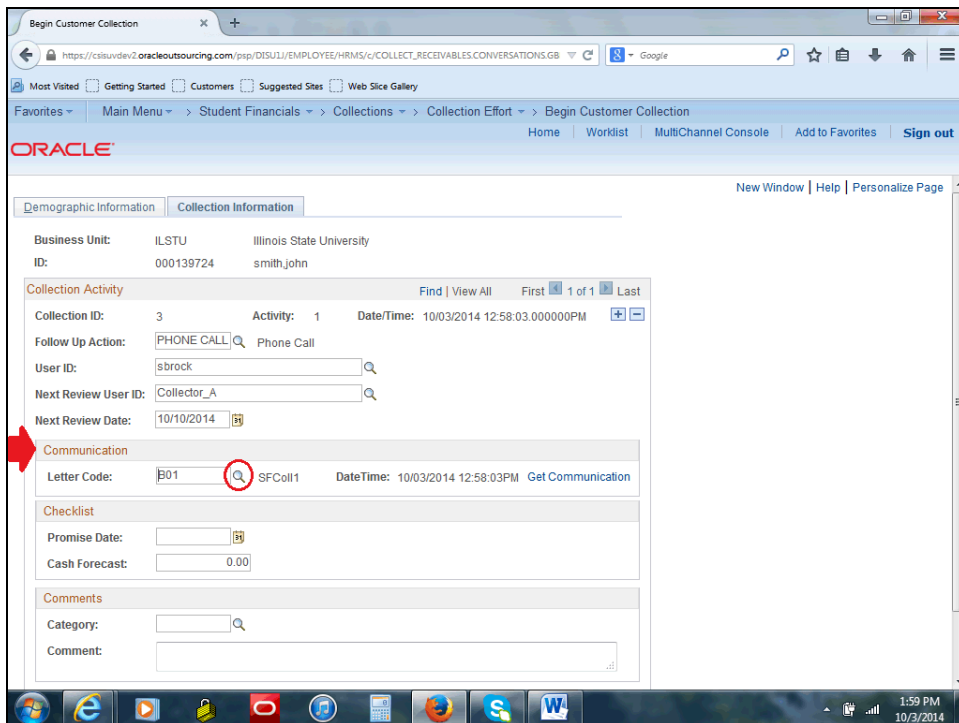
Step	Action
12.	<p>Collection Activity</p> <p>Click the Follow Up Action Look Up button.</p> <p>Select an Action from the list.</p> <p>Note: Illinois State University will be customizing this list to include other follow up actions.</p>



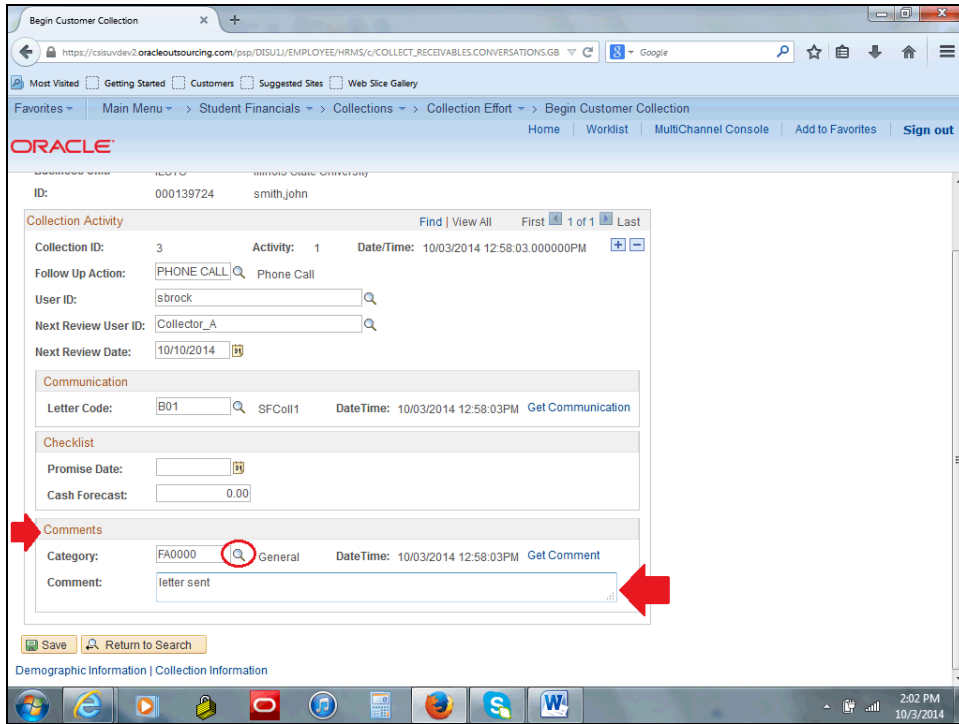
Step	Action
13.	<p>Click the Next Review User ID Look Up button.</p> <p>Select a User ID from the list.</p>



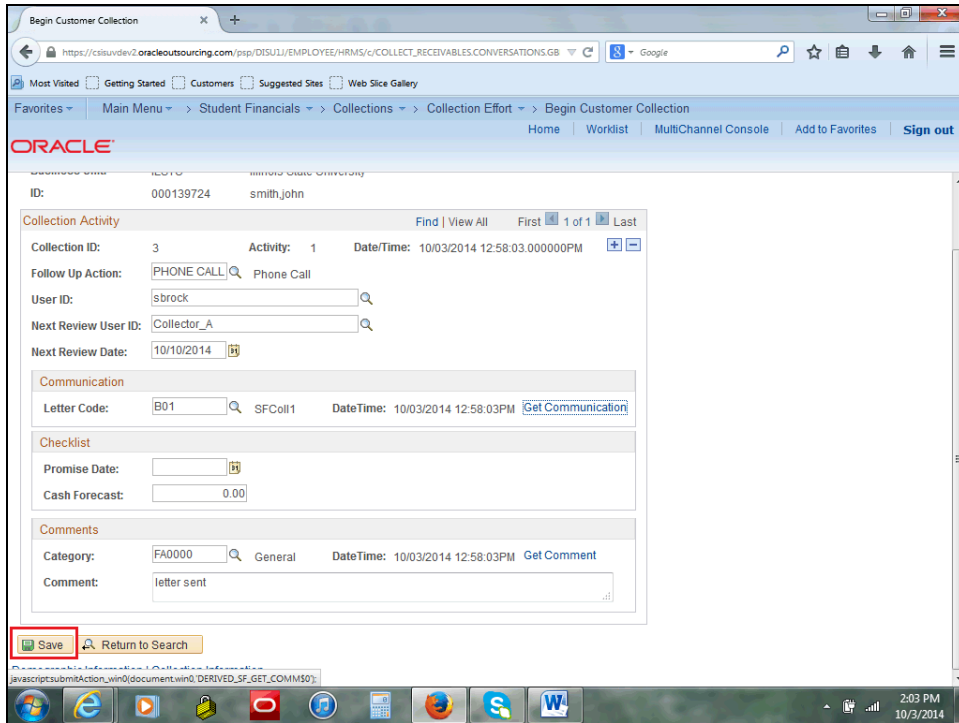
Step	Action
14.	Click the Next Review Date Calendar link and select a date from the calendar.



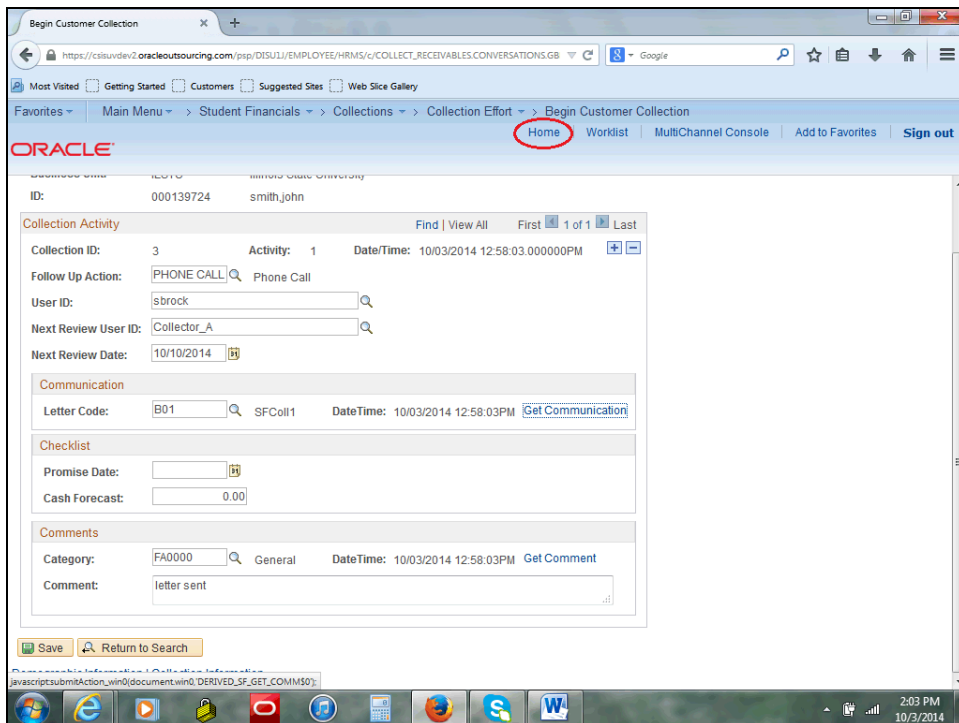
Step	Action
15.	<p>Communication</p> <p>Click the Letter Code Look Up button and select a Letter Code from the list.</p> <p>Note: Illinois State University does not have any letters configured yet. It has not yet been determined how, or if, we will use this functionality.</p>



Step	Action
16.	<p>Comments</p> <p>Click the Category Look Up button and select a Comment Category from the list.</p> <p>Note: Illinois State University has not yet configured categories for Student Financials and Collections.</p> <p>Enter comments in the Comments area.</p>



Step	Action
17.	Click the Save button.



Step	Action
18.	To return to the Navigation Menu page, click the Home link at the upper right of the screen.
19.	Congratulations, you have completed beginning the collection process for a student. End of Procedure.