## **View Collection Flag on Account**



Before responding to a student's question about their account, check to see whether the student's account is actively in collection status. If their account has been referred to a collection agency, you must refer the student to the collection agency for any inquiries about their account. Follow these steps to ensure you provide the student with the correct information and directions.

## **View Collection Flag**

From your UR Student Home Page

- 1. Find the **student** 
  - a. Type the student name in search
  - **b.** Select Student from the categories
  - c. Click the student's name

Rochester Q sammy	sosa
Search Results	
Categories	Search Results 1 items
Common	Student
Banking	Sammy Sosa
Expenses	Student   University of Rochester
Financial Accounting	
Integrations	Tip: try selecting another category from the left to see other results
Organizations	
Payroll	
People	
Processes	
Procurement	
Reporting	
Revenue	
Security	
Staffing	
Student	
All of Workday	•

- 2. Click Student Financials (left blue column)
- 3. Click on any of these tabs: Academic Period, Payment Plan (only appears if student has a payment plan), Account Transactions or Outstanding Charges and Payments
- 4. Look for Collection Status = At Collection Agency

Student Financials Period Re	ecords	Academic Period	Account Transactions	Outstanding Charges and Payments	Historical Transactions	
University of Roch	ester <sub>rd</sub> ्			3		
Collection Status At C	Collection A	sgency				
Total Account Balance	4,861.27				Past Due	4,813.14
Due Now	4,861.27				Current Due	48.13
					Future Due	0.00

- 5. For more details, click the magnifying glass next to Student Collect Record
- 6. Follow the standard business process for referring the student to the collection agency

