Job Aid

Managing SAL Memos

The Memo Action Tab provides access to important notes about an account. Memos are created automatically by system functions, but they can also be added manually by Heartland ECSI staff or a school.

1.0 View Memos

To view Memos associated with an account, click the Memo Action Tab.

Memo Fields	
Date	SAL automatically provides a date stamp indicating the date that the memo was
	created.
Time	SAL automatically provides a time stamp indicating the time that the memo was
	created.
Code	A descriptor used to define the source of the conversation you had with the
	borrower. "BC - Borrower Call" is the most commonly used Code.
Borrower Contact Memo	Text description of the conversation.
Review Date	Used in conjunction with the Collections Module. It allows collectors to set a date
	to follow-up on the account.
Operator/Name	SAL automatically records the operator who accessed the account.
	System-automated memos can be identified by the Operator ID:
	C* Indicates that the memo was generated due to a Clearinghouse process.
	EC – Indicates that the memo was generated due to a SAL process.
Call Code	Optional field used to indicate if a call was incoming or outgoing.
Next Up Arrow	Allows you to view the prior 30 comment lines.





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7.2 Add a Memo

Memos should be added to an account every time you interact with a borrower. Memos can be seen by both Heartland ECSI and by clients.

Adding a Memo				
Step 1:	From the Memo screen, click the Add Memo button.			
Step 2:	Select a Memo code.			
Step 3:	Click the Accept button.			
Step 4:	Type the memo. Concisely summarize your interaction with the borrower.			
Step 5:	Click the Accept button to save the memo.			
	Memos WILLIAM L LYNCH			
1	Date Time Op Code Memo Review date Next Step			
	9/26/2011 20:37 EC ME WebACH: 0/01/2111 \$67.75 9/ 9/2011 20:31 EC ME WebACH: 10/01/2111 \$67.75			
	9/9/2011 20:31 EC ME WebACH: 09/10/2011 525.32 8/10/2011 17:11 EC ME COUPON BOOK 67.75/67.75 10/11-09/12 2/20/2014 14:12 C× ME ULTADAUL ST PIDET CTOPTED 00180041			
	11:19 C* NS PHILDAELPHIA COLL OSIEOPATHIC MED 11:19 C* NS T-BG:11132010 TEND:02182011			
	11:19 C* NS 43 PER24A BYPASSED - NOT REQ'D 11:19 C* NS 43 ALM05A BYPASSED - NOT REQ'D			
	3/ 9/2011 11:19 EC ME 43-PER240 WebExit E-signed: 03/09/2011 3/ 9/2011 11:15 EC ME 43-ALM05A WebExit E-signed: 03/09/2011			
	2/19/2011 15:41 C* NS FULL-TIME STS FIRST STARTED: 05222010 17:26 C* NS PHILADELPHIA COLL OSTEOPATHIC MED 12:26 C* NS T-BC:11122014 TEND:02182011 0CD:02252011			
	17:26 C* NS 43 PER24A BYPASSED - NOT REQ'D 17:26 C* NS 43 ALM05A DEFERMENT EXTENDED 0311 0311			
	17:26 G* NS 2/10/2011 17:26 EC ME COUPON BOOK 25.32/ 25.32 04/11-03/12 1/1/2011 0:01 C* NS FULL-TIME SIS FIRST STARTED: 05222010			
	17:14 C* NS PHILADELPHIA COLL OSTEOPATHIC MED 17:14 C* NS T-BG:11132010 TEND:02182011 AGD:02182012			
	17:14 C* NS 43 PER24H DEFERMENT EXTENDED 1210 0311 17:14 C* NS 43 ALM05A DEFERMENT EXTENDED 1210 0311 17:14 C* NS			
	11/11/2010 17:14 EC ME COUPON BOOK 25.32/ 25.32 01/11-12/11 11/ 5/2010 15:03 RF ME P 105+ TUID1A 43 5577.15 TO .00			
	11/ 5/2010 14:59 RF BC advised bur paid \$3,310.17 via school 14:59 RF BC website 08/13 acct should be zero			
	14:59 RF BC balance 10/15/2010 17:46 RF BC bwr called re: TUT01A bwr stated he has 12:46 RF BC called numerous times hun states acct			
	17:46 RF BC paid in full 08/13/2010 in the amt of 17:46 RF BC 53,310.17 thru schools website advised			
	17:46 RF BC bwr I would contact the school on Monday 17:46 RF BC as the school is now closed and then 17:46 RF BC as the school is now closed and then			
	10/ 7/2010 13:09 EC SL 120 DAY LATE 9/18/2010 15:53 C* NS FULL-TIME STS FIRST STARTED: 05222010			
	19:39 C* NS PHILADELPHIA COLL OSTEOPATHIC MED 19:39 C* NS T-BG:08142010 TEND:11122010 AGD:01012011 ▼			



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7.3 Delete/Modify a Memo

You are able to delete or make changes to a memo that you created. You have until the end of the business day or until another SAL user modifies the account to make the change. To delete or change a memo that you recently entered, double-click the memo and follow the on-screen prompts.

Change or delete memo		x
	Change/update selected memo	
	Delete selected memo permanently	
	Accept Cancel	



