

Collect – College Credit Card Marketing Agreement

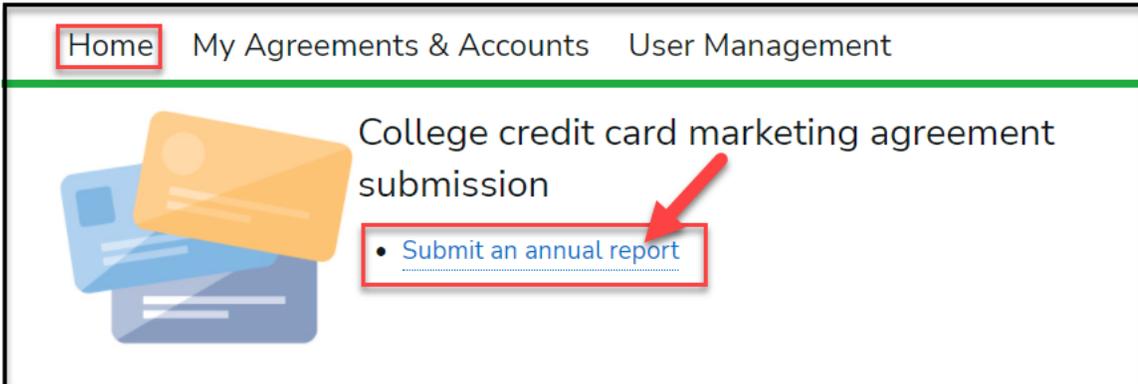
This document provides a high-level overview of how to review and add college credit card agreements using Collect. Please reference the full Collect College Credit Card Marketing Agreement User Guide for more detailed information.

12 CFR 1026.57(d) provides that card issuers that were parties to college credit card marketing agreements in effect at any time during a calendar year must submit an annual report to the Bureau regarding those agreements. Card issuers are required to submit their annual reports for a given calendar year to the Bureau by the first business day on or after March 31 of the following calendar year.

Submit an annual report

Step 1

From the Collect homepage, select **Submit an annual report**.



Step 2

Enter all required fields with the following additional guidance: (**Note:** All fields with a red asterisk (*) to the left of the label are required.)

- **Agreement Name:** this is a short descriptive name that identifies the agreement
- **Issuer Name:** this will be auto-populated when you enter your institution's name in **Search Entities**.
- **Year:** should reflect the year in which the agreement was in effect, not the current year
- **Institution Name:** the designated institution name
- **Institution Type:** indicates type of organization the indicated institution is (note that you are able to select multiple values)
 - **University:** institution of higher education
 - **Alumni:** alumni organization affiliated with or related to an institution of higher education
 - **Foundation:** foundation affiliated with or related to an institution of higher education
 - **Other:** organization other than an institution of higher education, alumni organization, or foundation
- **City:** the city in which the indicated institution is located
- **State:** the state in which the indicated institution is located
- **Status:** indicates whether an agreement is new, same (unchanged from previous submissions), or amended
 - **Same:** issuer has previously submitted an agreement with this institution or organization, and the terms of the agreement have not been amended or modified during the calendar year
 - **Amended:** issuer has previously submitted an agreement with this institution or organization, but the terms of the agreement have been amended or modified during the calendar year.
 - **New:** issuer has not previously submitted an agreement with this institution or organization.
- **Payment by Issuer During Calendar Year:** total dollar amount of any payments pursuant to the agreement from the issuer to the institution or affiliated organization during the calendar year
- **Accounts Opened During Calendar Year:** total number of credit card accounts opened pursuant to the agreement during the calendar year
- **Total Open Accounts at Year End:** total number of credit card accounts opened pursuant to the agreement that were open at the end of the calendar year (regardless of when the account was opened)

- **Agreement in Effect Jan 1 Next Year:** enter yes or no to whether the agreement was in effect the first day of the current calendar year



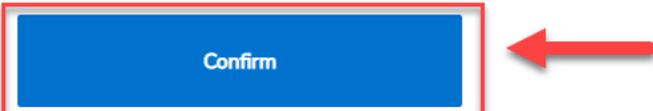
New College Credit Card Marketing Agreement

*Agreement Name ⓘ <input type="text"/>	*Status --None--
*Issuer Name Search Entities... <input type="text"/>	*Payment by Issuer During Calendar Year <input type="text"/>
*Year ⓘ --None--	*Accounts Opened During Calendar Year <input type="text"/>
*Institution Name <input type="text"/>	*Total Open Accounts at Year End <input type="text"/>
*Institution Type Available: University, Alumni Association, Foundation, Other Chosen: <input type="text"/>	*Agreement In Effect Jan 1 Next Year --None--
*City <input type="text"/>	
*State --None--	

Confirm

Step 3

After inputting the details, select **Confirm**, and the website will direct you to the Agreement page.



 Intake
AGMNT-226792

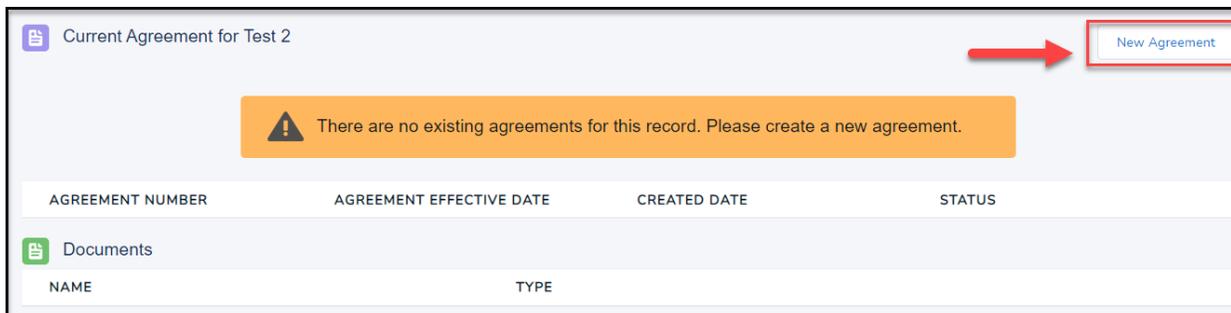
Agreement Name ⓘ TEST	Status New
Issuer Name Example Issuer	Payment by Issuer During Calendar Year 1.00
Year ⓘ 2021	Accounts Opened During Calendar Year 1
Institution Name TEST	Total Open Accounts at Year End 1
Institution Type Other	Agreement In Effect Jan 1 Next Year Yes
City Bowling Green	
State KY	

Add a College Credit Card Marketing Agreement and Memorandum of Understanding to an Annual Report

You are required to submit a single combined PDF containing the College Credit Card Marketing Agreement and Memorandum of Understanding.

Step 1

From the Agreement page, select the **New Agreement** button to the right of the section title, **Current Agreement for [Agreement Name]**.



Current Agreement for Test 2

[New Agreement](#)

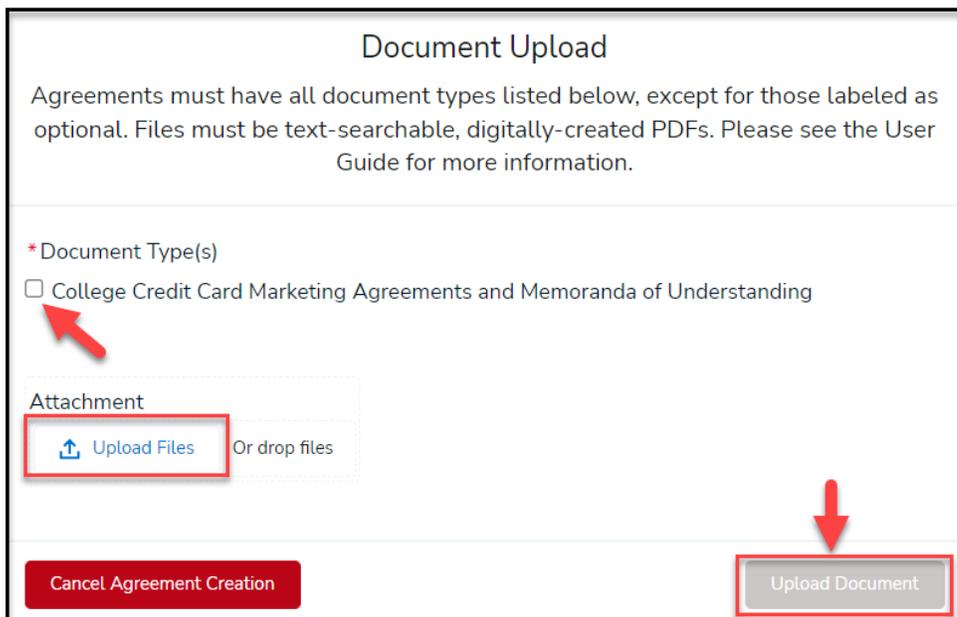
⚠ There are no existing agreements for this record. Please create a new agreement.

AGREEMENT NUMBER	AGREEMENT EFFECTIVE DATE	CREATED DATE	STATUS
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Documents

NAME	TYPE
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Select the checkbox next to **College Credit Card Marketing Agreements and Memoranda of Understanding** and then browse for a file using the **Upload Files** button. The **Document Type** must be selected before you can submit a file. Select **Upload Document** to proceed.



Document Upload

Agreements must have all document types listed below, except for those labeled as optional. Files must be text-searchable, digitally-created PDFs. Please see the User Guide for more information.

* Document Type(s)

College Credit Card Marketing Agreements and Memoranda of Understanding

Attachment

[Upload Files](#) Or drop files

[Cancel Agreement Creation](#) [Upload Document](#)

When completed, select the **Finish** button to return to the record page.

Document Upload

Agreements must have all document types listed below, except for those labeled as optional. Files must be text-searchable, digitally-created PDFs. Please see the User Guide for more information.

All required documents have been uploaded. Select Finish to complete this Agreement.

* Document Type(s)

College Credit Card Marketing Agreements and Memoranda of Understanding

Attachment

[Upload Files](#) Or drop files


Finish

[here.](#)

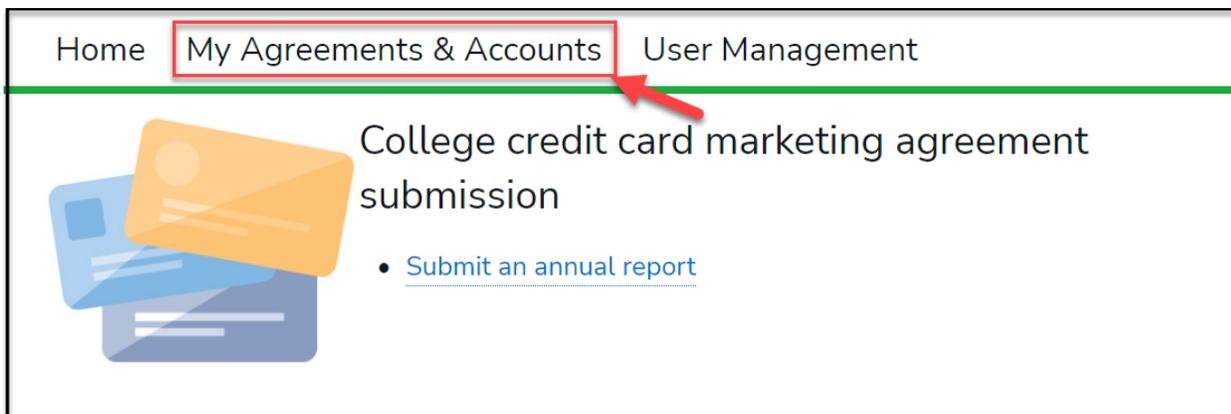
 Current Agreement for TEST			
AGREEMENT NUMBER	AGREEMENT EFFECTIVE DATE	CREATED DATE	STATUS
IFL-10764		12/13/2021 05:07 PM	COMPLETE
 Documents			
NAME	TYPE		
Test Document 1 (2).pdf	COLLEGE CREDIT CARD MARKETING AGREEMENTS AND MEMORANDA OF UNDERSTANDING		

Review previous annual reports

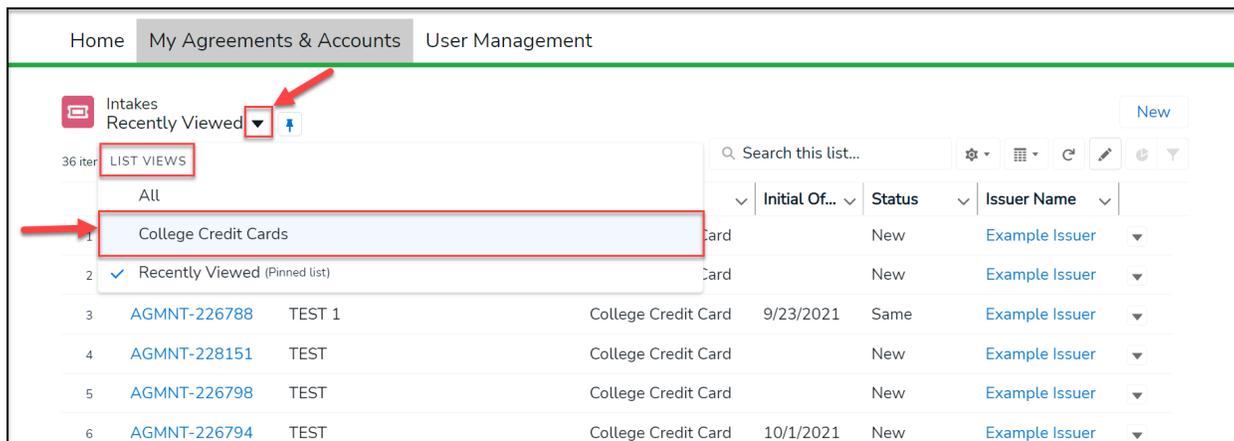
This section applies to card issuers who would like to review their previous annual reports. Note: Issuers will not be able to review submissions in Collect that were provided prior to the launch of the College Credit Card Marketing Agreement submission through Collect in January 2022.

Step 1

From the Collect homepage, select **My Agreements & Accounts**.



Select the arrow underneath **Intakes** to reveal the possible List Views and choose **College Credit Cards** from the list.



Step 3

Select the agreement you would like to review using the **Intake** number link.

Home		My Agreements & Accounts	User Management			
Intakes		College Credit Cards	New Printable View			
20 items • Sorted by Intake • Filtered by My intakes - Record Type • Updated a minute ago		Search this list...		Settings View Refresh Edit Delete Filter		
Intake ↑	Agreement Name	Year	Institution Type	Institution Name	Stat..	A...
1	AGMNT-226788	TEST 1	2020	University	TEST	Same
2	AGMNT-226792	TEST	2021	Other	TEST	New Y...
3	AGMNT-226793	TEST	2021	Other	TEST	New Y...
4	AGMNT-226794	TEST	2021	Other	TEST	New Y...

The Collect website will direct you to the agreement record you have selected. Review all fields for accuracy.

Intake AGMNT-226792	
Agreement Name ⓘ TEST	Status New
Issuer Name Example Issuer	Payment by Issuer During Calendar Year 1.00
Year ⓘ 2021	Accounts Opened During Calendar Year 1
Institution Name TEST	Total Open Accounts at Year End 1
Institution Type Other	Agreement In Effect Jan 1 Next Year Yes
City Bowling Green	
State KY	

Step 5

To review the agreement documents, scroll down the details page of the agreement accessed and select the available document name in **the Current Agreement for [Agreement Name]/Documents** section.

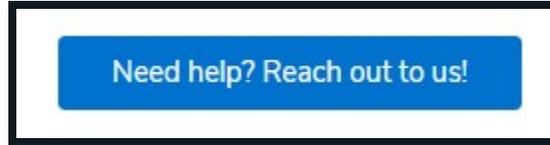
The screenshot shows a web interface for a 'Current Agreement for TEST'. At the top, there is a header with a folder icon and the text 'Current Agreement for TEST'. Below this is a table with the following columns: AGREEMENT NUMBER, AGREEMENT EFFECTIVE DATE, CREATED DATE, and STATUS. The table contains one row with the following data: IFL-10764, 12/13/2021 05:07 PM, and a green 'COMPLETE' button. Below the table is a 'Documents' section with a folder icon and the text 'Documents'. Underneath, there is a table with columns 'NAME' and 'TYPE'. The 'NAME' column contains 'Test Document 1 (2).pdf', which is highlighted with a red box and a red arrow. The 'TYPE' column contains 'COLLEGE CREDIT CARD MARKETING AGREEMENTS AND MEMORANDA OF UNDERSTANDING'.

Select **Back** in the browser to return to the Intake page and review any additional documents attached to the agreement.

The screenshot shows a document preview page for 'Test.pdf'. At the top left, there is a PDF icon and the text 'File Test.pdf'. To the right of this are several buttons: '+ Follow', 'Download' (highlighted with a red box and a red arrow), 'Upload New Version', and 'Edit File Details' with a dropdown arrow. Below the buttons, there is a table with columns 'Size', 'File Extension', and 'Owner'. The data in the table is: 27KB, pdf, and Christopher Burt t. Below the table, there are two tabs: 'PREVIEW' (highlighted with a red box and a red arrow) and 'DETAILS'. The 'PREVIEW' tab is active, showing a large white area with the word 'TEST' in the center. To the right of the preview area, there is a sidebar with two sections: 'Shared with (2)' and 'Versions (1)'. The 'Shared with (2)' section lists 'Christopher Burt t' as the Owner and 'IFL-10691' as Set by Record, with a 'View All' link. The 'Versions (1)' section lists 'Version 1' by Christopher Burt t on 11/3/2021 3:43 PM, with a 'View All' link.

Step 6

NOTE: Only system administrators can edit File Details for existing records. If any of the fields are incorrect or if there is an issue with an uploaded agreement, please select the **Need help? Reach out to us!** button from any page in Collect.



Collect: Get Support

Have a question for us? Please use the form below to contact us.

* Preferred Contact Method
Email

* Collection Type
College Credit Card Marketing Agreement

* Question/Comment
Incorrect year for AGMNT-228147, should be 2020, not 2021

Next



Need additional help with Collect?

The Bureau has created a detailed user guide for submitting college credit card marketing agreements, in addition to FAQs. To access the resources, visit <https://www.consumerfinance.gov/data-research/credit-card-data/>.