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
Step 3

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

![Confirm button]

**Intake**

AGMNT-226792

<table>
<thead>
<tr>
<th>Agreement Name</th>
<th>Status</th>
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<tbody>
<tr>
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<td>Example Issuer</td>
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<td>Total Open Accounts at Year End 1</td>
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</table>
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]**.

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

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

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