



FINANCE SERVICES - ASSESSMENT

Finance-Assessment Services

ISSUANCE OF STATEMENT OF ACCOUNT

Schedule of Availability of Service:	8:00 am – 5:00 pm (Monday - Friday)
Clients/Customers:	Students
Requirement/s:	Assessment Form
Processing Time:	11 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Presents Assessment Form and/or ID and Cash Payment to the Assessment Clerk/Collecting Officer	Receives the Assessment Form and Cash payment from student; Counts the amount of money received and informs the student of the amount received - Cashier	1 – 3 minutes	None	Ma. Salvadora Cauilan Nikko John Tanagan	Assessment Form
2	Wait for the processing of the service	Inputs payment on the system and prints Official Receipt; Initial/ Signs on Official Receipts - Cashier	1 – 3 minutes	None	Ma. Salvadora Cauilan Nikko John Tanagan	Official Receipt
3	Wait for the processing of the service	Verifies records and prints Statement of Accounts; Signs the Statement of Account	1 – 3 minutes	None	Ma. Irene Agarpao Ariel Misador Via Carlotta Macarubbo	Statement of Account
4	Receives the Statement of Account and signs on the logbook	Records name of client on the receiving logbook	1 – 2 minutes	None	Ma. Irene Agarpao Ariel Misador Via Carlotta Macarubbo	None
End of Procedure						

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Cagayan State University is committed to transform the lives of people and communities through high quality instruction and innovative research, development, production, and extension.

Core Values

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FINANCE SERVICES - ASSESSMENT

Finance-Assessment Services ISSUANCE OF CERTIFICATION

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Students
 Requirement/s: Assessment Form
 Processing Time: 14 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Presents Assessment Form and/or ID and Cash Payment to the Assessment Clerk/Collecting Officer	Receives the Assessment Form and Cash payment from student; Counts the amount of money received and informs the student of the amount received	1 – minute	None	Ma. Salvadora Cauilan Nikko John Tanagan	Assessment Form
2	Wait for the processing of the service	Inputs payment on the system and prints Official Receipt; Initial/ Signs on the Official Receipts	1 – 3 minutes	None	Ma. Salvadora Cauilan Nikko John Tanagan	None
3	Waits for the processing of the service	Verifies records and prints Certification; Initials on the Certification and presents to the Campus Accountant for Signature	1 –5 minutes	None	Ma. Irene Agarpao Ariel Misador Via Carlotta Macarubbo	
4	Waits for the processing of the service	Signs the Certification	1 – 3 minutes	None	Aida S. Cauilan Authorized Representative	Certification
5	Receives copy of the certification and signs on logbook	Records the name of the client on the receiving logbook and issues certification	1 – 3 minutes	None	Ma. Irene Agarpao Ariel Misador Via Carlotta Macarubbo	None
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FINANCE SERVICES - ASSESSMENT

Finance-Assessment Services REQUEST OF ADJUSTMENT

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Students
 Requirement/s: Request for Adjustment
 Processing Time: 11 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Fills-up two (2) copies of Request for Adjustment and submits to the Assessment clerk together with the approved dropping form	Receives Request for Adjustment and supporting documents from client	1 – 3 minutes	None	Assessment Clerks	Request for Adjustment Form
2	Waits for the processing of the service	Verifies electronic or manual record; Initials on the Request for Adjustment Form and presents to the University Accountant for Approval	1 – 3 minutes	None	Assessment Clerks	None
3	Waits for the processing of the service	Verifies dropping form and approves request for adjustment	1 - 2 minutes	None	Assessment Clerks	None
4	Receives copy of approved Request for Adjustment	Adjusts assessment of client and stamps “ADJUSTED” on request form; Releases one (1) copy of the form to the client	1 – 3 minutes	None	Assessment Clerks	Request for Adjustment Form
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Finance-Assessment Services

OTHER REQUEST FOR ADJUSTMENT OF ASSESSMENT

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Students
 Requirement/s: Request for Adjustment
 Processing Time: 10 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Fills-up for Adjustment form; Submits to the Assessment Clerk	Receives Request for Adjustment and supporting documents from client	1 – 2 minutes	None	Assessment Clerks	Request for Adjustment Form
2	Waits for the processing of the service	Verifies the validity of the claim. If valid, initials on the request and presents to the University Accountant for approval	1 – 3 minutes	None	Assessment Clerks	None
3	Waits for the processing of the service	Verifies request and approves the request form	1 - 2 minutes	None	Assessment Clerks	None
4	Receives copy of approved Request for Adjustment	Updates the adjustment on their respective ledger and stamps “ADJUSTED” on the request form; Release one (1) copy of form to the client	1 – 3 minutes	None	Assessment Clerks	Request for Adjustment Form

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FINANCE SERVICES - ASSESSMENT

Finance-Assessment Services

COLLECTION OF DOWNPAYMENT AND VALIDATION OF ENROLLMENT

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Students
 Requirement/s: Assessment Form and Official Receipt of Payment
 Processing Time: 10 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Present Assessment Form and Cash Payment	Receives the Assessment Form and payment from client; Counts the amount of money received and informs the client of the amount received	1 – minute	None	Assessment Clerks	Assessment Form
2	Waits for the processing of the service	Checks record of client the manual file or electronic record; Reconciles with Assessment Form of client; Verifies amount of fees required as down payment. Checks if amount received from client is sufficient, if not, requires the client to make additional payments	1 - 3 minutes	None	Assessment Clerks	None
3	Waits for the processing of the service	Inputs payment on the system and prints Official Receipt	1 - 3 minutes	None	Assessment Clerks	Official Receipt
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Finance-Assessment Services

PROCESSING REFUNDS FOR STUDENTS

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Students
 Requirement/s: Official Receipt and Statement of Account
 Processing Time: 13 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Presents supporting documents (Official Receipt, Statement of Account)	Verifies validity of the claim and completeness of supporting documents. Informs client if not valid or if are incomplete supporting documents	1 - 5 minutes	None	Joan Dimain	None
2	Waits for the processing of the service	If valid and complete; informs the client of the date of release of the check; Prepares disbursement voucher and records on logbook; Forwards to the Accountant for signature	1 - 3 minutes	None	Joan Dimain	Disbursement Voucher
3	Waits for the processing of the service	Verifies completeness of the supporting documents and signs on Box A of the Disbursement Voucher, Returns to Assessment Clerk for releasing	1 - 3 minutes	None	Aida S. Cauilan	Disbursement Voucher
4	Waits for the processing of the service	Records DV on releasing book and forwards to the Cashier	1 - 2 minutes	None	Rhea Doreen Rueco	None
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FINANCE SERVICES - ASSESSMENT

Finance-Assessment Services

ISSUANCE OF EXAMINATION PERMITS

Schedule of Availability of Service:	8:00 am – 5:00 pm (Monday - Friday)
Clients/Customers:	Students
Requirement/s:	Assessment Form and Official Receipt of Payment
Processing Time:	10 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Presents Assessment Form and Cash Payment	Receives the Assessment Form and payment from client; Counts the amount of money received and informs the client of the amount received	1 - minute	None	Cash Clerks	Assessment Form
2	Waits for the processing of the service	Checks client's record in manual file or in electronic record, whichever applies; Verifies balance of fees required to be paid on the examination period; checks amount received from client's if sufficient; if not, instructs the client to make additional payment	1 - 3 minutes	None	Cash Clerks	None

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ISSUANCE OF EXAMINATION PERMITS

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Students
 Requirement/s: Assessment Form and Official Receipt of Payment
 Processing Time: 10 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
3	Waits for the processing of the service	Inputs payment on the System and Prints Official Receipt; Signs the Official Receipt	1 - 3 minutes	None	Cash Clerks	Official Receipt
4	Receives Assessment Form, Examination Permit and Official Receipt	Assessment clerk look for the examination permit on file; Initials/signs on the permit and stamps "Exam Permit Issued" in the Assessment Form of client; Release Exam Permit, Assessment Form and Official Receipt	1 - 3 minutes	None	Assessment Clerks	None
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FINANCE SERVICES - ASSESSMENT

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SIGNING OF CLEARANCE (TERMINAL)

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Graduating Students/ Graduates
 Requirement/s: Clearance Form
 Processing Time: 5 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Presents duly filled out Clearance Form to the Assessment Clerk	Receives the Clearance Form and reconciles with electronic record or manual file. Verifies payment of graduation fee. If the graduate has unpaid balance, instruct him or her to pay the balance. If fully paid, Assessment Clerk initials on the form and presents to the University Accountant for Signature	1 - 3 minutes	None	Assessment Clerks	Assessment Form
2	Waits for the processing of the service	Campus Accountant Signs the Clearance	1 - minute	None	Aida S. Cauilan Authorized Representative	None
3	Receives the signed clearance	Release signed clearance	1 - minute	None	Assessment Clerks	Official Receipt

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FINANCE SERVICES - ASSESSMENT

Finance-Assessment Services

SIGNING OF CLEARANCE (TRANSFEREES)

Schedule of Availability of Service: 8:00 am – 5:00 pm (Monday - Friday)
 Clients/Customers: Graduating Students/ Graduates
 Requirement/s: Clearance Form
 Processing Time: 5 minutes

STEPS	CLIENT/APPLICANT	TYPES OF FRONTLINE SERVICE	DURATION OF ACTIVITY	FEES	PERSON RESPONSIBLE	FORMS
1	Presents duly filled out Clearance Form to the Assessment Clerk	Receives the Clearance Form and verifies electronic record. If with unpaid balance, instruct the client to pay the balance; If fully paid. Assessment Clerk initials on the form and presents to the Accountant for signature	1 - 3 minutes	None	Assessment Clerks	Assessment Form
2	Waits for the processing of the service	Campus Accountant Signs the Clearance	1 - minute	None	Aida S. Cauilan Authorized Representative	None
3	Receives the signed clearance	Release signed clearance	1 - minute	None	Assessment Clerks	Official Receipt
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