TECHNICAL COLLEGE SYSTEM OF GEORGIA

Administrative Services

ECSI Email Campaign

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About ECSI Student Opt-In Email Campaign

ECSI offers our students the opportunity to receive their 1098-T Tuition Statement electronically. If the student would like to receive their 1098-T form electronically, they will need to give their consent to ECSI. If electronic consent is not received by January 1, 2020, the 1098-T will be mailed to the current address on file.

The ECSI Email Campaign allows colleges to create a file containing student information that will be used to contact the student, giving them the opportunity to receive their 1098T electronically. ECSI provides a template for the colleges to use as their letter to send to the students.

This guide will walk through the steps for setting up population selections, letters, and an Excel spreadsheet to use with the ECSI Email Campaign template to email to students.

Understanding the ECSI Email Campaign

This ECSI Email Campaign documentation will walk you through the steps to create files containing student information from banner, import that information into Excel and then create an email message using the ECSI letter template to send to all students that will be receiving a 1098T.

Valuable Information

For every 1098T that a student downloads from the ECSI site will save the postage for mailing that 1098T. If a student has downloaded their 1098T from the ECSI site, ECSI will not have to mail that 1098T to the student. The Result: SAVING POSTAGE!!!

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Population Selection Setup

Since the email campaign for ECSI is designed to contact students that will be receiving a 1098T, you will only need to send an email to those students who will be receiving a 1098T. This population selection would either be 1098T_SEND_TO_ECSI or 1098T_SEND TO_ECSI_ALL. Based on which population selection your college has chosen to use.

An example of the population selection for those choosing to only send 1098Ts to those students that have PYRE>GRSH or have adjustments for previous years, use this pop-sel.

✕ ⓐ ellucian Population Selection Definition Rules GLRSLCT 9.3.6 (PROD-PEL)				➕ ADD 📄 RETRIEVE 👥 RELATED ⚙ TOOLS		
Application: AR **Selection ID:** 1098T_SEND_TO_ECSI **Creator ID:** AWHITE						Start Over
▾ SELECTION DESCRIPTION				➕ Insert ➖ Delete ▣ Copy ▼ Filter		
Description	1098T SEND TO ECSI		☐ Delete			
	☐ Manual		☐ Application Level Rules Exist			
	☐ Locked					
▾ DEFINITION				➕ Insert ➖ Delete ▣ Copy ▼ Filter		
Select	TTBTAXN_PIDM					
From	TTBTAXN,SPBPERS					
▾ RULES				➕ Insert ➖ Delete ▣ Copy ▼ Filter		
'('	Object or Data Element	Operator *	Value	')'	AND / OR	
	TTBTAXN_TAX_YEAR	=	&TAX_YEAR		AND	
	SPBPERS_CITZ_CODE	NOT IN	('NR','N','UA','OC')		AND	
((	TTBTAXN_AMOUNT_1	>	TTBTAXN_AMOUNT_4	)	OR	
(	TTBTAXN_AMOUNT_6	>	0	)	OR	
(	TTBTAXN_AMOUNT_5	>	0	))		
⏮ ◀ 1 of 1 ▶ ⏭ 10 ▾ Per Page					Record 1 of 5	

For those choosing the option to send 1098T to ALL students you would use the following pop-sel.

✕ ⓐ ellucian Population Selection Definition Rules GLRSLCT 9.3.6 (PROD-PEL)				➕ ADD 📄 RETRIEVE 👥 RELATED ⚙ TOOLS		
Application: AR **Selection ID:** 1098T_SEND_TO_ECSI_ALL **Creator ID:** AWHITE						Start Over
▾ SELECTION DESCRIPTION				➕ Insert ➖ Delete ▣ Copy ▼ Filter		
Description	1098T SEND TO ECSI		☐ Delete			
	☐ Manual		☐ Application Level Rules Exist			
	☐ Locked					
▾ DEFINITION				➕ Insert ➖ Delete ▣ Copy ▼ Filter		
Select	TTBTAXN_PIDM					
From	TTBTAXN					
▾ RULES				➕ Insert ➖ Delete ▣ Copy ▼ Filter		
'('	Object or Data Element	Operator *	Value	')'	AND / OR	
	TTBTAXN_TAX_YEAR	=	&TAX_YEAR			
⏮ ◀ 1 of 1 ▶ ⏭ 10 ▾ Per Page					Record 1 of 1	

Running your pop-sel

Next you would run your pop-sel in GLBDATA in order to populate your selection data.

In the example below, I am using the population selection 1098T_SEND_TO_ECSI_ALL. If you are using the population selection 1098T_SEND TO_ECSI (students that have PYRE>GRSH or have adjustments for previous years) you would enter that pop-sel in Parameter 1.

One Time Letter and Paragraph Setup

Your next step will be to setup a letter and paragraph code. This should be a one-time setup process and will only need to be changed if you have a variable change, or want to create a new letter or add new paragraphs.

Setup a letter code in the GTVLETR form. This code will be used later in the GUALETR. The GUALETR form contains your paragraph. Make sure that the Allow Duplicates Indicator is checked.

After you have setup your letter code, you will then need to setup a paragraph code in the GTVPARA form. This code will be used later in the GUAPARA. This GUAPARA form contains your variables for your data.
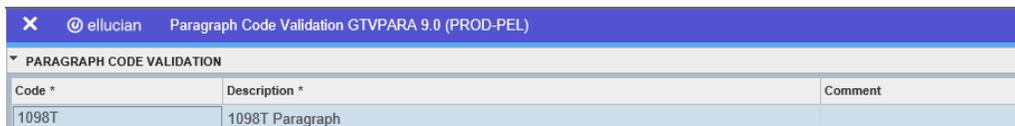
Then you must add your paragraph code to the letter code on GUALETR. This will attach your letter and paragraph codes together. Make sure to enter a sequence number or your process will fail.
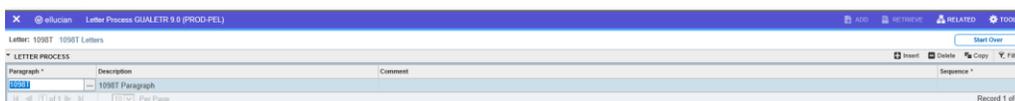
Add your variables to your paragraph on the GUAPARA form. This is the part that actually contains your variable information that will be placed in the .doc file that is created later in the process.
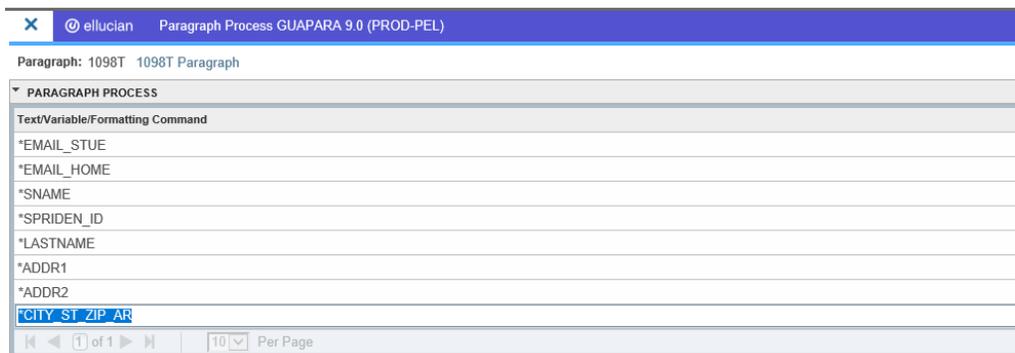
At this time your one-time setup is complete. Again this data may need to be updated at a later date, but if not this section can be skipped. If variables need to be updated, you will update those using the GLRVRBL form.

Creating letters and output files

In this section we will take a look at the steps to run your letters and produce your output file to import into Excel for your data source (email address). To create your output file you will need to run GLBLSEL. This is your Letter Extract form and pulls the data from your variables on the GUAPARA form that will be used later for your output file. GLBLSEL will use your letter code and population selection that you have created in the previous steps.

The GLBLSEL program will produce a listing and a log file. However the listing file will always be 0 bytes. You will need to look at the log file in order to see what was pulled. In a perfect world, the number of letters inserted should match the number of students in your population selection.

Then you will run GLRLETR. This is the actual letter generation program that will create your output file. You will need to run this in audit mode first, to make sure the data layout is correct. **When running in audit mode you will only receive one record.** Once everything looks good you will run again in update mode.

NOTE: Each time your run GLRLETR in update mode, a record is added to the SUAMAIL/GUAMAIL form. You will need to be careful about the data that is added to this form.

Review your .doc file to make sure it looks correct.

After your run GLRLETR in Audit Mode, you will need to run again in Update Mode. To do this, change parameter 08 from a Y for Audit to N for Update and run the program again. This will produce a listing, log and .doc file. You will need the .doc file to create your spreadsheet for the data source used to run your Mail Merge in Microsoft Word. (The letters you will send to the students for ECSI opt-in program.

You will then need to download the file from the banner box. This file is located in the /u02/jobsub/PROD/gurjobs directory. Each school can use a different software package to download your files. But in general this download will be whatever SSH/SFTP software package you use to pull your files down.

Creating the Data Source.

Once you have downloaded your output file to your PC you will need to import this into Excel. You will use this spreadsheet as your data-source (email addresses) for the Opt-In letter you will be sending out. There are many ways to import this data. You will need to import the way you are comfortable with. The way below is only one way to import this data.

Open a New Excel Workbook and click the Data tab.
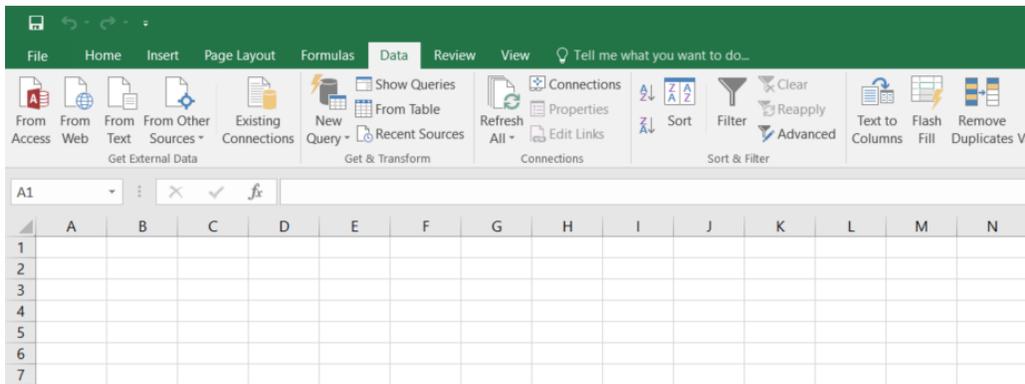


On the Data Tab click the **From Text** button.

On the Import Text File screen, change the file type by using the drop-down. You will need to change the drop-down from Text Files to All Files. Then browse for your filename and click **Import.**
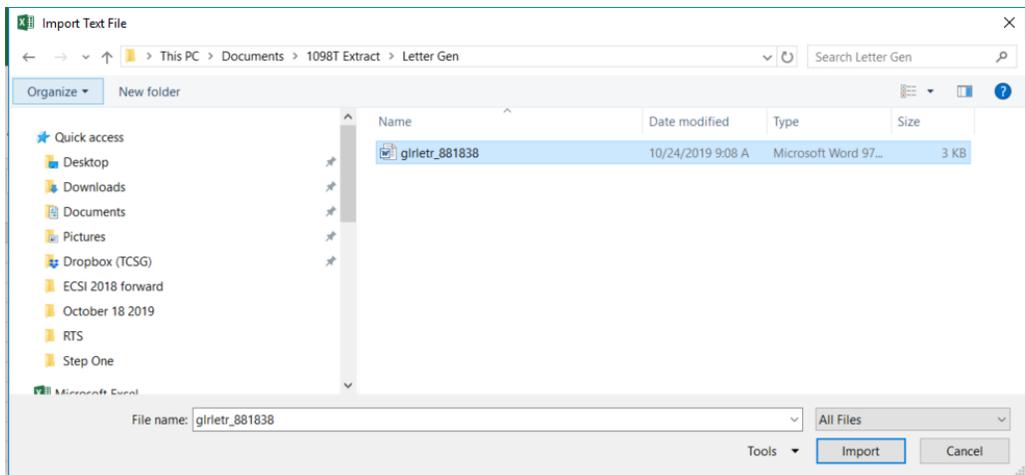
A Text Import Wizard window should appear. In the Text Import Wizard window, ensure that the delimited radio button is selected. Then click **Next**
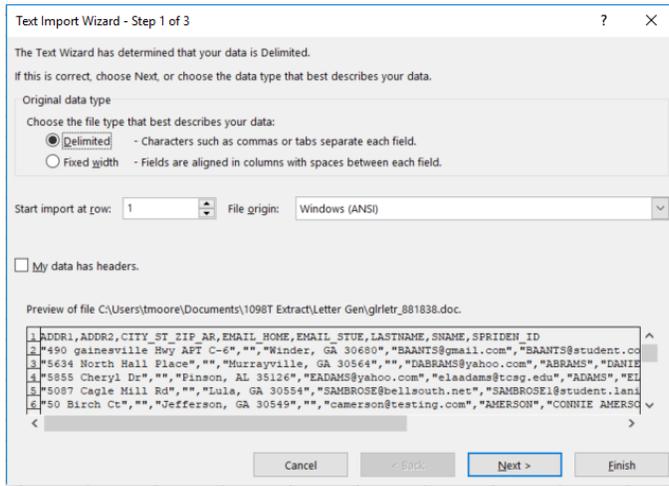
On Step 2 of the Text Import Wizard, in the Delimiters section, choose Comma. Then click **Finish**. We choose this because the output produced from banner is delimited by commas.
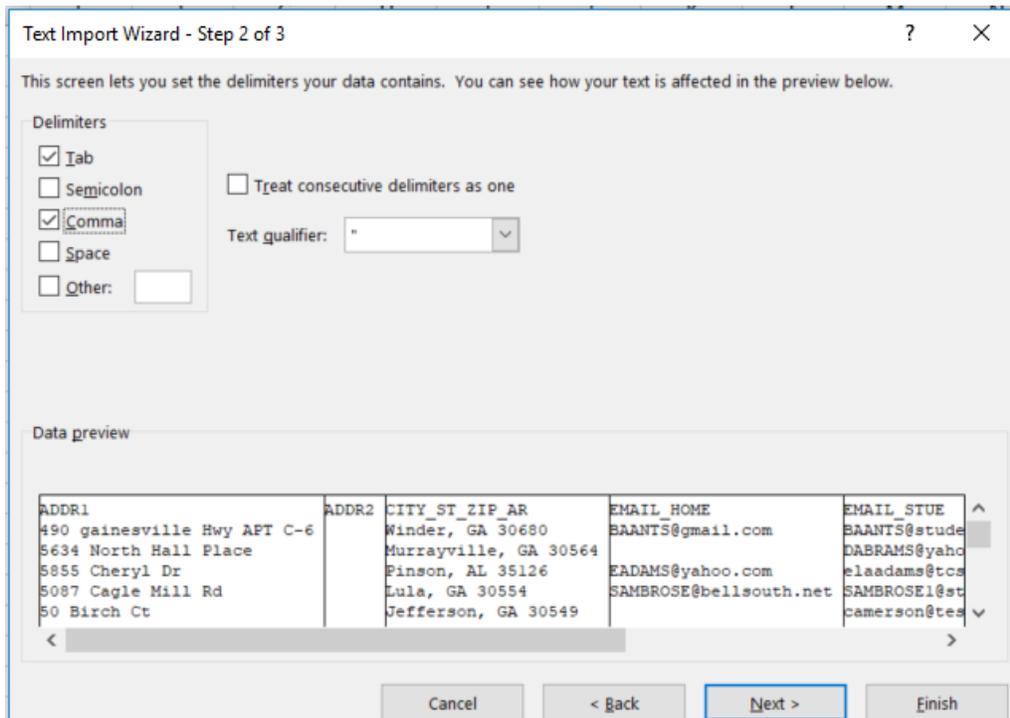
Your final step on the import process is the Import Data box. You will just need to click **OK**
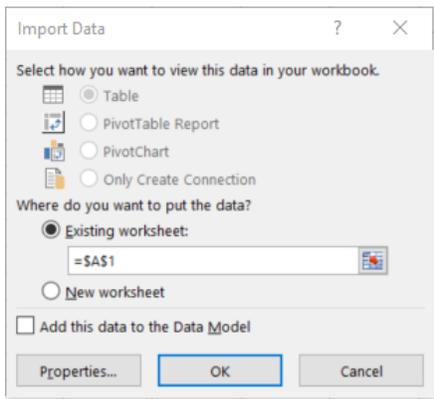
You should now have a full spreadsheet. You will then need to edit the spread to remove all columns except Student ID and Email Address. If you choose to send letters, you would leave the columns for the student's addresses.

Then ensure that each Student ID in the spreadsheet has only one email address. Any Student ID without an email address will need to be removed. However, you will need to work these "errors" to try to get the student's email address.

An example of your finished spreadsheet is listed below. Once complete, ensure that you save your file. (In this example the student's addresses was removed.)

|	A	B
1	SPRIDEN_ID	EMAIL_STUE
2	910117599	BAANTS@student.college.edu
3	910099529	DABRAMS@yahoo.com
4	910116889	elaadams@tcsg.edu
5	910115940	SAMBROSE1@student.lanier.edu
6	910016889	camerson@testing.com
7	910006478	DAPONTE@student.laniertech.edu
8	910109521	FAUGELLO@student.lanier.edu

Creating the Mail Merge Document

In this section you will be using the ECSI Student Electronic Opt-In Email Template as your letter to send to the students and you will use the Excel spreadsheet that you just created as your recipients.

First open your ECSI Student Electronic Opt-In Template in Microsoft Word.   Save it with a different name. You will need to add your college's name in the first paragraph where it has <<School Name>>. For example:

Dear Student,

Albany Technical College has partnered with Heartland ECSI, offering you the opportunity to receive your 1098-T Tuition Statement electronically this year. If you would like to receive your 1098-T form electronically, please give your consent by following the link provided below and following the step by step instructions. 1098-T's will be provided by the end of January 2020. If electronic consent is not received **by January 1, 2020,** the 1098-T will be mailed to the current address on file.

Next you will click on the tab **Mailings**
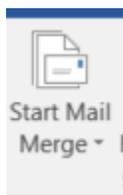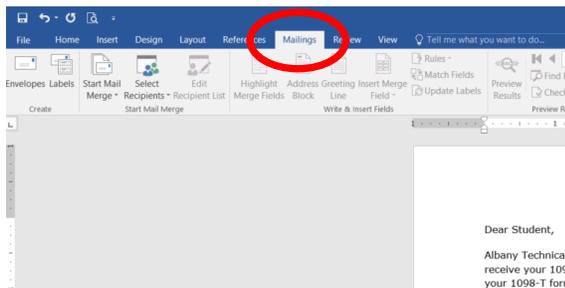
Click on the **Start Mail Merge small down arrow** to bring a list to choose from. Select Step by step Mail Merge Wizard.

A Mail Merge List will appear on the right side of your screen.

Click **Select a different list** and browse to find your excel spreadsheet that you created.
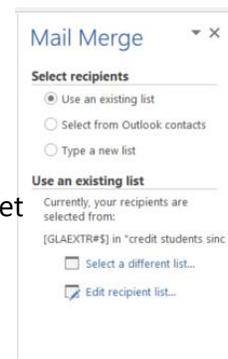
Then click **Open**
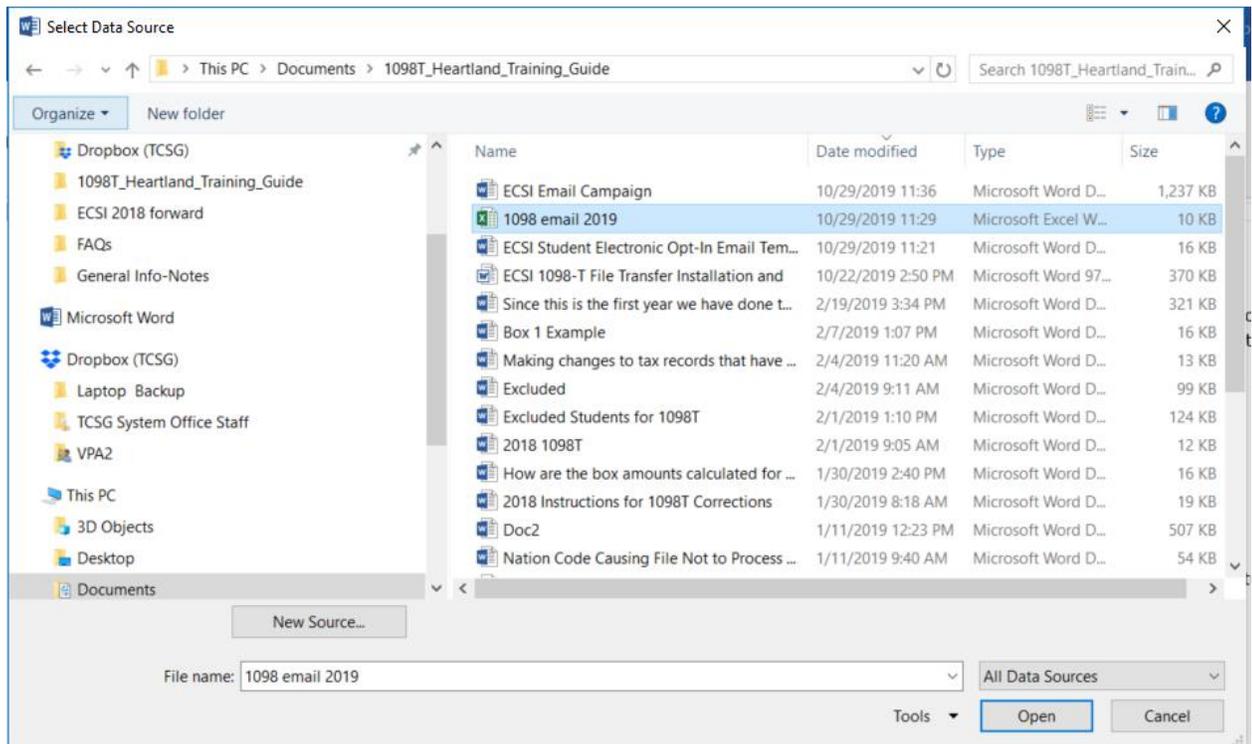

Select **Sheet 1** and then Click **Ok**
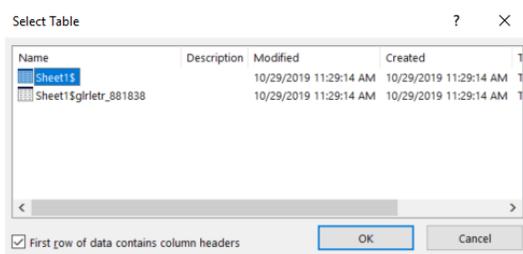
At the bottom right of the screen you will Step 3 of 6, click on Next: **Write your e-mail message**.
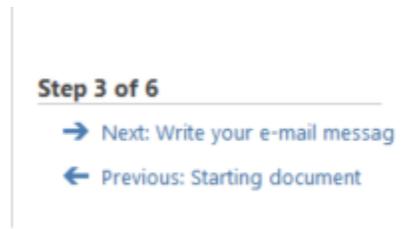
You have already created your message by using the ECSI Student Electronic Opt-In Template. Just make sure you have change it to your College's Name. Now click **Preview your e-mail message**. Step 4 of 6 at the bottom right corner of the page.

Step 4 of 6
→ Next: Preview your e-mail messa
← Previous: Select recipients
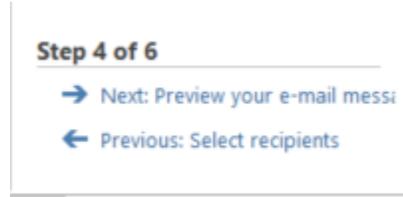
You can Preview your e-mail message. You can click the arrows to left or right to preview your email message.

Mail Merge   ▾ ✕

Preview your e-mail messages
One of the merged messages is previewed here. To preview another message, click one of the following:
<< Recipient: 1 >>
Find a recipient...

Make changes
You can also change your recipient list:
Edit recipient list...
Exclude this recipient
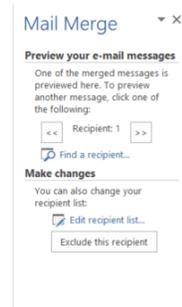
Step 5 of 6 Click on Next: **Complete the merge**

Step 5 of 6
→ Next: Complete the merge
← Previous: Write your e-mail mes
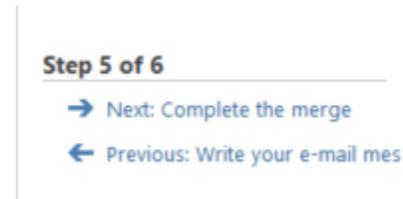
Step 6 of 6 Complete the merge.

Mail Merge is ready to produce your e-mail message. Click on **Electronic Mail**

Mail Merge   ▾ ✕

Complete the merge
Mail Merge is ready to produce your e-mail messages.

Merge
Electronic Mail...
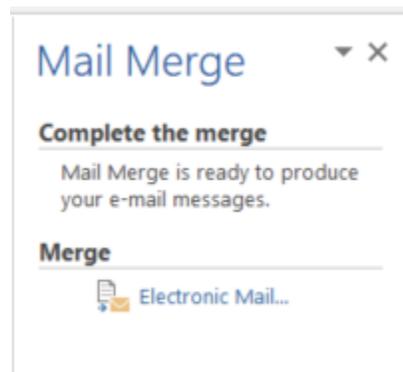
Click the drop down arrow and choose the column name of email addresses in your excel spreadsheet. Enter a subject line, make sure All is marked. Then click **OK**.
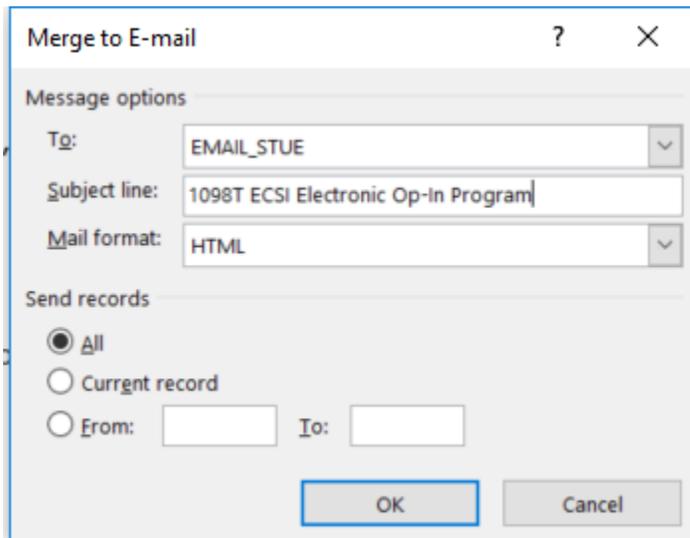
Once you click on OK, an email will be sent to all of the recipients in your excel spreadsheet of the 1098T student's. Remember this email will be coming from your email address. You can go to your email and look in your Sent Items to see where the email letter was sent to the 1098T students.

ECSI Student Electronic Opt-In Email Template

Below the ECSI Student Electronic Opt-In Email Template. You can copy and paste the template below into a word document to be use as your letter to send to the students. You will need to change the <<School Name>> to your Colleges Name.

Dear Student,

<<School Name>> has partnered with Heartland ECSI, offering you the opportunity to receive your 1098-T Tuition Statement electronically this year. If you would like to receive your 1098-T form electronically, please give your consent by following the link provided below and following the step by step instructions. 1098-T's will be provided by the end of January 2020. If electronic consent is not received **by January 1, 2020,** the 1098-T will be mailed to the current address on file.

1098-T Electronic Consent
https://heartland.ecsi.net/index.main.html#/access/eConsent

The benefits to receiving electronic notification are:

- Online delivery provides access to the form 1098-T earlier than the traditional mailing process.

- Online delivery eliminates the chance that the 1098-T will get lost, misdirected or delayed during delivery, or misplaced once the student receives it.

- Signing up for online delivery is easy and secure.

- Students can receive their 1098-T form while traveling or away from their home address.

To give consent to receive your 1098-T form electronically, click on the link below and follow the simple instructions to sign up!

- Visit https://heartland.ecsi.net/index.main.html#/access/eConsent

- Follow the step-by-step instructions on the web form.

- Check the box and click submit.

It's that easy!

If you have any questions, please visit http://www.ecsi.net/taxinfo.html for information regarding your tax documents and to obtain contact information for Heartland ECSI.