



## REFERENCE GUIDE

# CLIENT WEBSITE (WEBX) OVERVIEW

March 2014

MH

PRODUCT  
TRAINING





## Client Website (Webx) Overview



## Client Website (Webx) Overview

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## Client Website (Webx) Overview

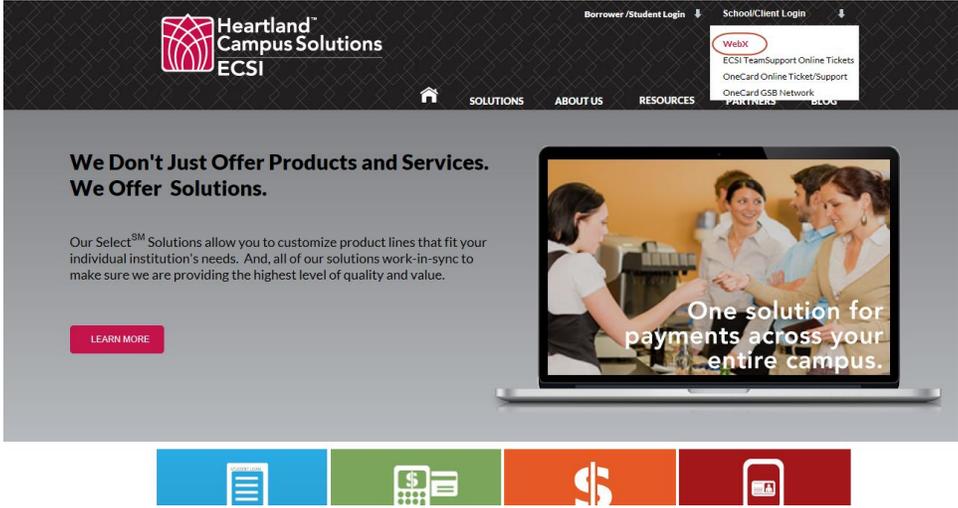
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## Client Website (Webx) Overview

### 1.0 Logging In

Clients are able to access borrower account information and various utilities using Heartland ECSI's client website, often referred to as Webx.

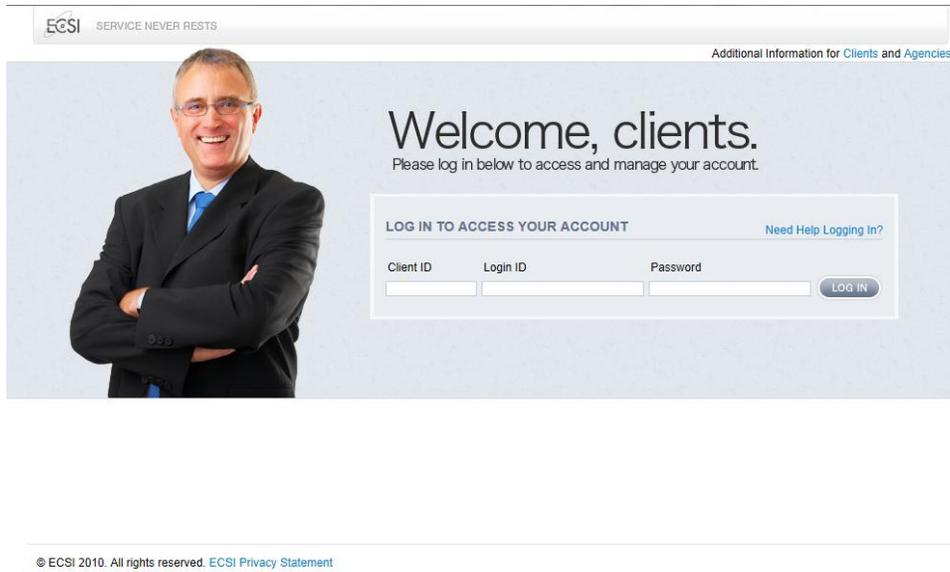
Logging in as a Client	
Step 1:	<p>From HeartlandECSI.com, click the <b>School/Client Login</b> box link then click <b>Webx</b>.</p> 



## Client Website (Webx) Overview

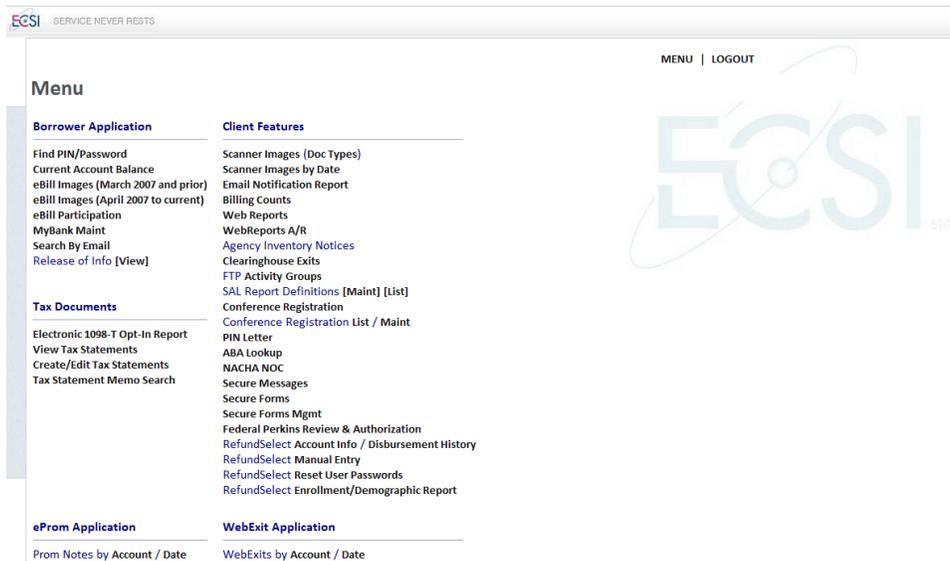
Step 2:

Enter the appropriate Client Code, Login ID, and Password. Click the **Log In** button.



Step 3:

Once logged in, clients are presented with several menu options. This manual will review only the most commonly used items.





## Client Website (Webx) Overview

### 2.0 Borrower Application

Clients are able to access a limited amount of borrower-specific information using the links available under Borrower Application.

#### 2.1 Find PIN/Password

The Find Pin/Password link allows clients to assist borrowers with their Pin/Passwords for the borrower website. All borrowers are initially assigned a Pin when their account is created. They then have the option to change the Pin to a Password of their choosing at any time. If a borrower has both a Pin and Password listed on the Find Pin/Password screen, the Password should be provided to the borrower.

Click the Send link to send an email to the borrower containing Pin/Password information.

**ECSI** SERVICE NEVER RESTS

MENU | LOGOUT

### Find Pin/Password

**Message:**

Account: 111111111 [Find]  
 [<<] [<] [>] [>>]

[Send] [Opt-Out] [Lock Account] [Unlock Account] [Menu]  
 [Reset Password to Pin] [Reset Last Login Date] [Reset Email to Blank] [Reset Security Questions]

**Results:**

- School: ZZ
- Account: 111111111
- Name: Joe Lange
- Last Login: 20140409
- Locked?: No
- Pin: DEMO
- Password:** 49466
- Question: Example: Mother's maiden name?
- Answer:
- Email: smith@gmail.com
- Send To: smith@gmail.com
- Do NOT send activity emails



## Client Website (Webx) Overview

### 2.2 Current Account Balance

The Current Account Balance screen can be used as an overview of a borrower account. It includes the current account balance as well as payment history information for a particular borrower.

**Current Account Balance**

Student Account Number: 111111111 [View] No hyphens!

Name: **Joe Lange**  
Address: 181 Montour Run Road  
City/State/Zip: Coraopolis PA 15108 USA  
Phone: 412-555-1212  
Date of Birth: 7/14/1977  
Email: jlange@noisp.com

School: Demo School  
c/o: ECSI  
181 Montour Run Road  
Coraopolis PA 15108

Campus	Fund	Debt Amount	Balance	Principal Paid	Payoff Amount	Fixed Payment	Current Due	Interest Rate	Months Delinquent	Last Payment Date	Last Payment Amount	Last Check Number	Defer/Post Date	Defer/Post Type	Separation Date
02	PER211	\$6,288.74	Contact School for Information							3/26/2014	\$34.76	842549	9/2014	Pending Bankruptcy-13	05/30/1991
02	PER221	\$5,833.91	Contact School for Information							3/26/2014	\$32.25	842549	9/2014	Pending Bankruptcy-13	05/30/1991

- For debts not yet in repayment, the amount in the Fixed Payment column is the minimum monthly amount for the debt program and may not be applicable to you. You will be provided with an updated payment amount before you leave school.
- The amount in the Current Due column includes the current payment due, any overdue payments and fees.

(02-PER211) PERKINS-N 8/92 - 6/93 [Get Payment History]

Campus	Fund	SP	CC	Type	Date	CK-NO	Amount	Apply	Principal	Interest	Pen/Late	Agency	Legal	Inhouse	Suspense	NSF	Letter	Cred Bur	Other-1	Phone	
02	PER211			PERMNT	02/26/2014	842549	27.05		24.76												

### 2.3 eBill Images

An electronic copy of all borrower bills is generated at the time that bill calculations are done. The ebills are available for viewing by both the borrower and by clients. To view an eBill, type the student's ID number then click the Find link. All available bills will display. Select a date then click the View link for the eBill.

**Review eBills**

111111111  
Joe Lang  
181 Montour Run Road  
Coraopolis, PA 15108

Amount Due: 201.00  
Date Due: 04/01/2014  
Payoff: 201.00

**Demo School** Generated on: 03/11/2014

Type	Description	Current Due	Past Due	Fees Due	Amount Due	To Pay in Full	Frequency	S.P.	Debt Amount	Prin. Balance	Int. Paid/Canc	Fees Paid	Last Payment
B0421A	Books - Spring												
	Current Due	201.00											
	Past Due												
	Fees Due												
	Amount Due	201.00											
	To Pay in Full	201.00											
	Frequency	Monthly											
	S.P.												
	Debt Amount	201.00											
	Prin. Balance	201.00											
	Int. Paid/Canc												
	Fees Paid												
	Last Payment	** NONE **											

Please note: ECSI converts all checks to electronic payments(ACH). Please see www.ecsi.net/bills for more information.  
School: (270)745-3551  
We are attempting to collect a debt and that any information obtained will be used for that purpose.

IMMEDIATE ACTION NECESSARY, YOUR ACCOUNT IS 285 DAYS PAST DUE  
Due Diligence Regulations require us to report delinquency to the credit bureau!



## Client Website (Webx) Overview

### 2.4 Release of Info (View)

By default, only persons named on a promissory note are permitted to access information about their loans. However, the borrower is able to grant Heartland ECSI permission to discuss account details with authorized people. The Information Release Form allows the borrower to select up to five people. Borrowers can modify the release of information at any time. All releases on file for a borrower can be viewed using the Release of Info (View) link. The most recent version is listed at the top.

**Release of Information Documents**

**NOTE:**

The Family Educational Rights and Privacy Act (FERPA) affords certain rights to students concerning the privacy of, and access to, their education records. Students may choose to complete and submit this form to ECSI to allow the release of their financial education records to specified third parties. Please note that while this form authorizes ECSI to release education records to third parties, it does not obligate ECSI to do so. ECSI reserves the right to review and respond to requests for release of education records on a case-by-case basis. For additional information of FERPA, visit the U.S. Department of Education's website at <http://www.ed.gov/policy/gen/guid/fpco/ferpa/index.html>.

- By completing this form, you are giving ECSI and your school permission to discuss the details of your account with the parties listed below. You may revoke permission at any time by removing a person's name from the list.
- Updating your authorized users will take one business day to be reflected on your account.
- Please return to the [My Account] page if you do not wish to complete this form.

School: ZZ  
 Account: 111111111  
 Name: Student, Sample

**Release information to the following:**

- Name: Robert W Jones  
 Relationship: Father  
 Address 1: 255 Crawford Avenue  
 Address 2:  
 City/State/Zip: Pittsburgh PA 15345  
 Country: United States  
 Home Phone: 412-279-4321  
 Work Phone:  
 Cell Phone:

### 3.0 Tax Documents

The Tax Documents section of Webx provides access to tools that may be useful for clients that leverage Heartland ECSI's TaxSelect product. It includes information relevant to 1098-T and 1098-E forms.

#### 3.1 View Tax Statements

Per federal regulations, schools are required to send 1098T forms to anyone who paid in excess of \$600 of tuition within a year. Lenders are also required to send 1098E forms to anyone who has paid interest on a student loan. Both forms can be used for federal income tax credits. The View Tax Statements screen gives clients access to current and prior tax documents.

**Review Tax Statements**

Click here for the ECSI TaxSelect 1098-T Handbook PDF

**Message:**

School: ZZ Last Name: [Find] Student ID: [Find]  
 Account: 111111111 [Find] Last 4 SSN: [Find]

Below are the tax documents available for your account.

[View]	Year	Type
<input checked="" type="radio"/>	2013	1098-E
<input type="radio"/>	2012	1098-T
<input type="radio"/>	2012	1098-E
<input type="radio"/>	2011	1098-E
<input type="radio"/>	2010	1098-E
<input type="radio"/>	2010	1098-T



## Client Website (Webx) Overview

### 3.2 Create/Edit Tax Statements

The majority of tax documents are created using a batch process. However, if a client misses a student/borrower when submitting the file for 1098-T and 1098-E documents, a single tax statement can be manually created. Additionally, errors on tax statements can be edited.

#### 3.2a Create a new Tax Document

If a student is not included in the final production file, his or her 1098-T can be created manually.

*Step 1:* Click the Create/Edit Tax Documents link.

*Step 2:* Enter the student's Social Security number and the tax year.

*Step 3:* Click the Find link. The client information will populate in the appropriate fields.

*Step 4:* If the system is able to find a match for the information provided, a 1098-T exists for the student. Verify the information on the 1098-T and update as needed.

*Step 5:* If the system is not able to find a match for the information provided, a new 1098-T can be manually created. Enter the appropriate data in each field.

*Step 6:* Click the Create link.

*Note:* If any required fields are not completed, an error message will display.

#### 3.2b Update an Existing Tax Document

If a 1098-T exists for a student, but contains erroneous information, it can be corrected manually. Note: There is a separate process required for correcting a Social Security number..

*Step 1:* Click the Create/Edit Tax Documents link.

*Step 2:* Enter the student's Social Security number and the tax year.

*Step 3:* Click the Find link.

*Step 4:* Update the required information.

*Step 5:* Click the Update link.

#### 3.2c Delete a Document

1098-Ts can be deleted as necessary.

*Step 1:* Click the Create/Edit Tax Documents link.

*Step 2:* Enter the student's Social Security number and the tax year.

*Step 3:* Click the Find link.

*Step 4:* Verify that the 1098-T on the screen is the one that should be deleted.

*Step 5:* Click the Delete link.

*Step 6:* Verify that the correct 1098-T will be deleted. Click the OK button.



## Client Website (Webx) Overview

### 3.2d Correct a Social Security Number

If an incorrect Social Security number has been listed on a 1098-T, a new 1098-T will need to be created and the original deleted. Rather than creating the new 1098-T manually, the one with the incorrect Social Security number can be used as a template.

*Step 1:* Click the Create/Edit Tax Documents link.

*Step 2:* Enter the *incorrect* SSN and tax year.

*Step 3:* Click the Find link.

*Step 4:* Type over the incorrect SSN in two places:

- *The SSN field above the form*
- *The student's Social Security number within the form*

*Step 5:* Click the Create link to generate the new form.

*Step 6:* The 1098-T with the incorrect SSN must be deleted. Refer to 6.2c for instructions.

### 3.3 Tax Statement Memo Search

If a student calls in regards to a 1098-T form, all possible efforts will be made to memo the T statement with a description of the call and resolution provided. The View Tax Memos screen will display memos associated with 1098-T forms.

View Tax Memos

Click here for the ECSI TaxSelect 1098-T Handbook PDF

**Message:**

**Search By:**

Student SSN:

[Find]

Ssn:  Last4:  Last Name:  Issue #:

Date	School SSN	Year	First Last	Source	Type	Issue#	Memo
20130103	ZZ 11111111	2012	Joe Lange	Student Call	Login Request	0123456789	This is a test memo!
20130104	ZZ 11111111	2012	Joe Lange	Parent Email	No 1098T Processed – Referred to	0987654321	This is a test memo!
20130104	ZZ 11111111	2012	Joe Lange	Parent Call	No 1098T Processed – Referred to School	0011223344	



## Client Website (Webx) Overview

### 4.0 eProm Application

The eProm Application section provides access to various borrower documents including promissory notes, web entrances, and disclosures.

#### 4.1 Prom Notes by Account

Provides access to all promissory notes for a borrower. Enter the account number to view the promissory note(s).

**Promissory Notes by Account**

School:

Account:  [Find]

Below are the Promissory Notes available for Joe A Lange.

[Go!]

Memo:

Select	Type	Date	Amount	Loan Period	Status	Memo
<input checked="" type="radio"/>	Federal Perkins Loan (MPN)	02/26/2014	*	Open	Ready to E-Sign	
<input type="radio"/>	Medical LDS (MPN) - D10	02/26/2014	1,500.00	2013-2014	Ready to E-Sign	
<input type="radio"/>	Medical HPL (MPN) - H10	02/26/2014	1,500.00	2013-2014	Ready to E-Sign	
<input type="radio"/>	Nursing Student Loan (MPN) - NS2	02/26/2014	1,500.00	2013-2014	Ready to E-Sign	
<input type="radio"/>	Primary Care Loan (MPN) - P10	02/26/2014	1,500.00	2013-2014	Ready to E-Sign	

Return to the [Menu].

While viewing a borrower’s promissory notes, use the drop-down near the top of the screen to perform actions appropriate for the situation. For example, if a borrower did not receive the email requesting that he or she sign a promissory note, the email can be resent.

#### 4.2 Web Entrance by Account

Provides access to WebExits. It shows all exits assigned to a particular account and if the borrower has signed the exit. It all provides access to view part or all of the exit and several other administrative functions.

**Web Entrance by Account**

To retrieve a list of the Web Entrances.

Enter an account number. When the list of Web Entrances is presented, select an electronic entrance to view.

Account:  [Find]

[Go!]

Memo:

Select	Name	No. Loans	Completed	Memo
<input checked="" type="radio"/>	joe lange 1		Paper Signed a	

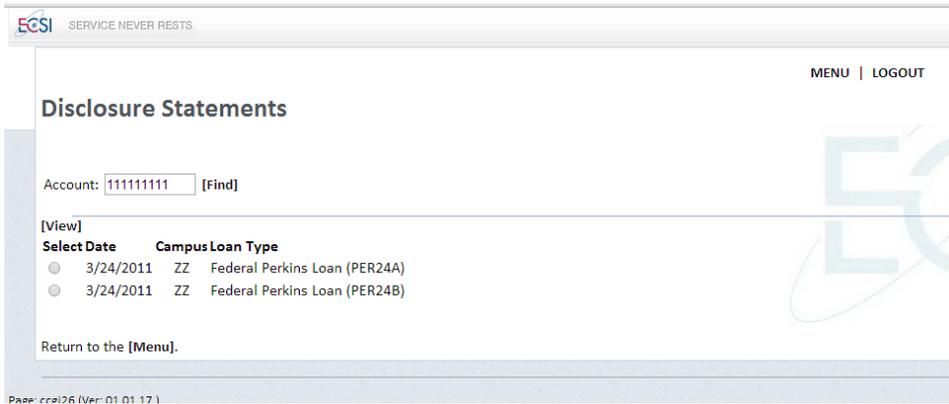
Return to the [Menu].



## Client Website (Webx) Overview

### 4.3 Disclosures

All disclosures sent to a borrower are available for electronic viewing using the Disclosures link.

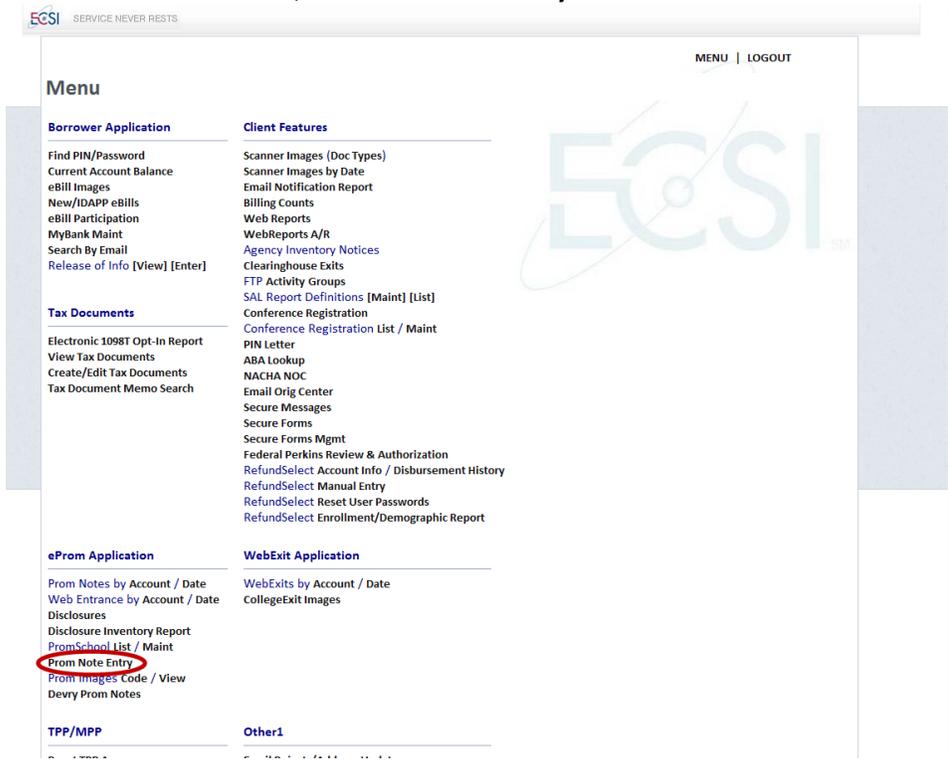


### 4.4 Prom Note Entry

The majority of promissory notes are created using a batch process. However, if a client misses a student/borrower when submitting the file promissory notes, a single electronic document can be manually created.

#### Creating a Prom Note

Step 1 From the Client Website, click **Prom Note Entry**.





## Client Website (Webx) Overview

Step 2

The Prom Note Entry screen will appear. Complete the information on the screen. Fields with a red triangle are required.

Fields that are not required, but that are helpful, include:

Email: This information is only required if ECSI is notifying students via email that there is a promissory note that needs to be signed. There is an additional cost for this service.

Date of birth: Can be used to help identify the student.

Phone: Can be used to help identify the student.

Driver's License Number: Can be used to help identify the student.

School Section: ECSI's address will appear in the school section. The campus code is a required field. Please note that the campus code must match what is being used in SAL.

Step 3

Click the **Save** link at the bottom of the screen. The promissory note will be created and ready for the student to sign.



## Client Website (Webx) Overview

### 5.0 WebExit Application

The WebExit Application section houses information about exits.

#### 5.1 Webexits by Account/Date

Provides access to WebExits by account or by date. When viewed by account, it shows all exits assigned to a particular account, if the borrower has signed the exit, and provides access to view part or all of the exit. Various administrative functions are also available via this link.

The screenshot shows the ECSI web application interface for 'WebExits by Account'. At the top left is the ECSI logo with the tagline 'SERVICE NEVER RESTS'. At the top right are 'MENU' and 'LOGOUT' links. The main heading is 'WebExits by Account'. Below this is a search bar for 'Account:' with the value '111111111' and a '[Find]' button. A message states 'Below are the Webexits available for Joe Lange.' There is a dropdown menu for 'View Exit Interview' and a '[Go!]' button. Below that is a 'Paper Signed Date:' field with a date format ' / / ' and a 'Memo:' field. A table lists the following data:

Loan Type	Total Financed	Signed	Memo
PER24A	7,300.00		Mailed Exit 01/22/2013
H1046A	5,500.00	01/01/2013 10.28.04	Paper Signed Exit
H2037A	5,500.00	02/01/2014 15.59.18	Paper Signed Exit
XDL01A	0.00		Unsigned Exit
XSL01A	14,926.00		Unsigned Exit
XPL01A	13,884.00		Unsigned Exit

At the bottom left, there is a link 'Return to the [Menu].'



## Client Website (Webx) Overview

### 6.0 Documents

The Documents section provides access to several types of SAL and Heartland ECSI documentation, including a user guide and training materials.

### 6.1 SAL Training

The SAL Training link provides access to a number of training manuals and job aids designed to support new and experienced SAL users.



### SAL Training Sessions

Your time is valuable, so ECSI offers a full range of flexible learning resources. You are able to learn about our products and services when your schedule permits and in a way that makes sense for you. Below you will find a variety of learning options. Select the one that best meets your needs. If you have a need for training that is not listed below, [click here](#) to suggest a training topic.

**User Guides:** ECSI's User Guides are the same manuals that we use in our instructor-led training sessions. You can use them to learn all of the basic concepts needed to use a product.

**Job Aids:** Job Aids are one or two-page "cheat sheets" that outline a specific process.

**Webinars:** Our instructor-led webinars run the first full week of each month. Space is limited and registration is first-come, first-serve. [Click here](#) to request a schedule of upcoming courses and to register.

• User Guides	Show Items
• Job Aids	Show Items



## Client Website (Webx) Overview

### 7.0 Client Features

The client features section includes links to many tools that clients/schools can use to manage accounts including reports, Clearinghouse utilities, scanned documents, and communication tools.

#### 7.1 Scanner Images

The Scanner Images link provides access to all scanned documents. When paperwork (e.g. deferments, forbearances, and cancellations) are submitted to ECSI, the paperwork is scanned and an electronic image is created. That electronic image is then visible to clients using the Scanner Images link. Enter the student's ID number (usually his or her Social Security number or Student ID number) and click the find link. Each page of documentation will appear as a link.

ECSI SERVICE NEVER RESTS

MENU | LOGOUT

### Scanner Images

**Message:**

Account:

Date	DocType	Amount	Check	Page(s)
10/23/2013	Deferment			[001]

Return to the [\[Menu\]](#).

Page: ccgi12 (Ver: 01.01.25)



## Client Website (Webx) Overview

### 7.2 Web Reports

The Web Reports link provides access to reports generated by Heartland ECSI for your organization. Reports are available in both pdf and csv format. Click the (v) link next to the report name to view a particular report.

Period: 04/2014 [Show] [Menu]

Category	File	Date/Time	Size	Description
[v]	BORROWER rpt-1.csv	04/11/2014 03.52	696,445	Borrowers in School: Excel
[v]	BORROWER rpt-1.pdf	04/11/2014 12.03	129,527	Borrowers in School: Adobe
[v]	BORROWER rpt-2.csv	04/11/2014 03.52	584,543	Borrowers in Grace: Excel
[v]	BORROWER rpt-2.pdf	04/11/2014 12.03	124,969	Borrowers in Grace: Adobe
[v]	BORROWER rpt-3.csv	04/11/2014 03.52	3,870,403	Borrowers in Repayment: Excel
[v]	BORROWER rpt-3.pdf	04/11/2014 12.03	1,128,848	Borrowers in Repayment: Adobe
[v]	BORROWER rpt1-3al.csv	04/11/2014 03.53	16,547,850	Reports Combined 1-3: Excel
[v]	BORROWER rpt-4.csv	04/11/2014 03.53	7,691,786	Borrowers Paid-up: Excel
[v]	BORROWER rpt-4.pdf	04/11/2014 12.03	2,017,190	Borrowers Paid-up: Adobe
[v]	BORROWER rpt-4a.csv	04/11/2014 03.53	23,599	Borrowers Paid-up (Archived Totals): Excel
[v]	BORROWER rpt-4a.pdf	04/11/2014 12.03	46,487	Borrowers Paid-up (Archived Totals): Adobe
[v]	BORROWER rpt-4b.csv	04/11/2014 03.53	23,850	Borrowers Paid-up (Retired Totals): Excel
[v]	BORROWER rpt-4b.pdf	04/11/2014 12.03	27,236	Borrowers Paid-up (Retired Totals): Adobe
[v]	BORROWER rpt-5.csv	04/11/2014 03.53	51,330	Borrowers Paid-up This Month: Excel
[v]	BORROWER rpt-5.pdf	04/11/2014 12.03	29,858	Borrowers Paid-up This Month: Adobe
[v]	BORROWER rpt-5a.csv	04/11/2014 03.53	40,265	Borrowers Paid-up This Month (All Loans): Excel
[v]	BORROWER rpt-5a.pdf	04/11/2014 12.03	12,957	Borrowers Paid-up This Month (All Loans): Adobe
[v]	BORROWER rpt-5b.csv	04/11/2014 03.53	12,317	Borrowers Paid-up This Month and loans with balance
[v]	BORROWER rpt-5b.pdf	04/11/2014 12.03	4,357	Borrowers Paid-up This Month and loans with balance
[v]	BORROWER rpt-6.csv	04/11/2014 03.53	11,484	Borrowers Assigned: Excel

### 7.3 Clearinghouse Exits

The Clearinghouse Exits link within Webx can be used to identify borrowers that have an error code on their Clearinghouse data. Heartland ECSI requests updates from the Clearinghouse monthly. The Clearinghouse sends back information on students whose enrollment information has changed since the last time Heartland ECSI requested an update. If there is an error on a student’s file, the Clearinghouse reports the error and Heartland ECSI leaves the student’s status as it is in SAL.

By running the Clearinghouse Exits utility, schools are able to identify students with errors and direct Heartland ECSI on whether or not to exit the student. Bypass the student to leave their status as is. Exit the student to direct ECSI to perform exit activities.





## Client Website (Webx) Overview

### 7.4 Secure Messages

The Secure Messages page in Webx is used to transmit messages to Heartland ECSI securely. Personally identifiable information such as Social Security numbers should never be included in an email, email attachment, or a TeamSupport ticket (TeamSupport is Heartland ECSI's support ticketing system) as the information can be intercepted. Secure Messages allows clients to send that type of information using a safe and secure method. If you are unsure which department your message should be directed to, select Help Desk. That will route your issue to the Client Support team and they will redirect the issue as needed.

### 7.5 Secure Forms

The Secure Forms page provides access to a number of forms that can be used to request action by Heartland ECSI via secure means. Commonly used secure forms include:

**SAL Security Form:** Use this form to request a SAL account for new staff members.

**Webx Security Form:** This form is used to request that a staff member be granted access to Webx.

**New Advance Form:** Use this form to request that a new borrower/student be added to SAL.

**New Fund Request Form:** This form is used to request that a new fund be added to your instance of SAL. The new fund could be required because of a change in promissory notes on an existing fund or because you have a new loan type.