Client Training
1098-T EasyPath Client Portal

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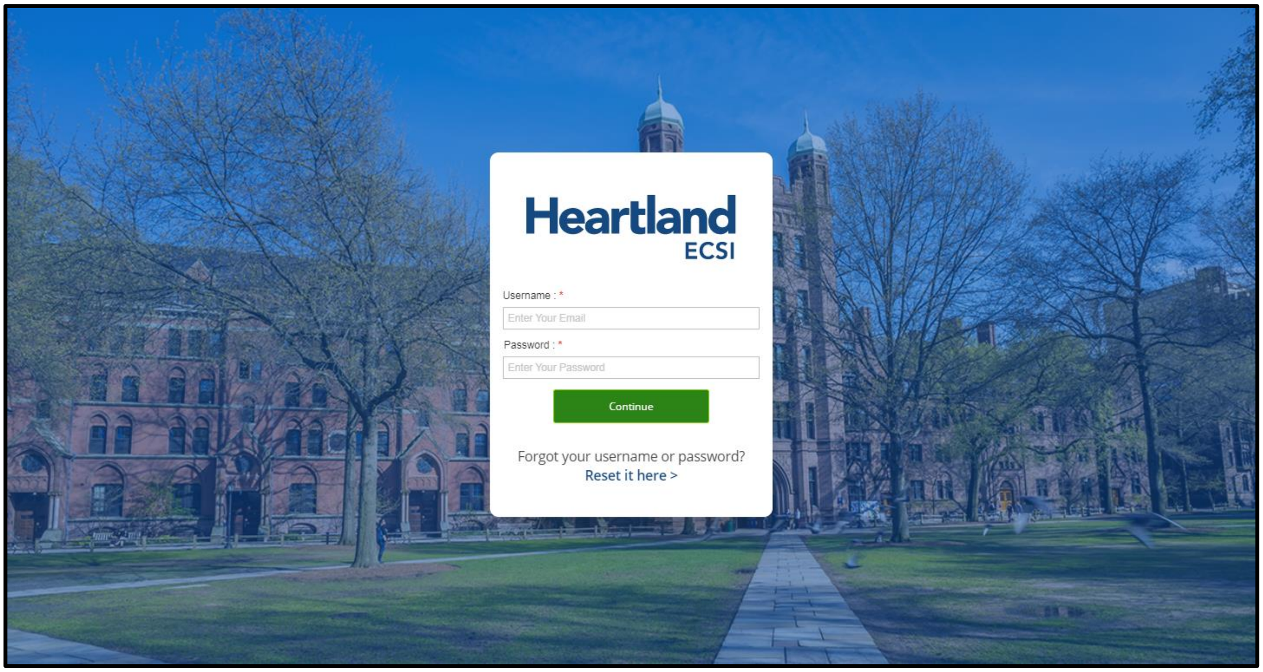
1.0 The EasyPath Client Portal

The EasyPath Client Portal will provide clients the ability to upload all of their 1098-T data files via our secure site, versus having to upload through the ECSI's SFTP. The EasyPath Client Portal will also provide clients an alternative way to review their 1098-T web reports provided by ECSI.



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1.1 Client Portal Access

TaxSelect clients will have access to upload 1098-T data files and obtain and review monthly web reports through the EasyPath Client Portal. To access the site, clients will receive an email communication that provides a link with instructions on how activate their user profile, create a password, and setup three security questions.

Note: As part of the sign in process, clients will be required to answer one of their security questions. Please be sure to remember your answers so you can always access your account in the future.

ECSI

Hi {{ClientUserFirstName}},

A user profile has been created for you on behalf of {{InstitutionName}}. To activate your user profile, click on the Activate User Profile link below.

{{UserProfileActivationLink}}

You will be asked to create a unique password and set up three security questions. Security questions will be used to verify your identity when signing in to the system, retrieving your username, or resetting your password.

If you have any questions, please contact ECSI toll-free at 1.800.437.6931.

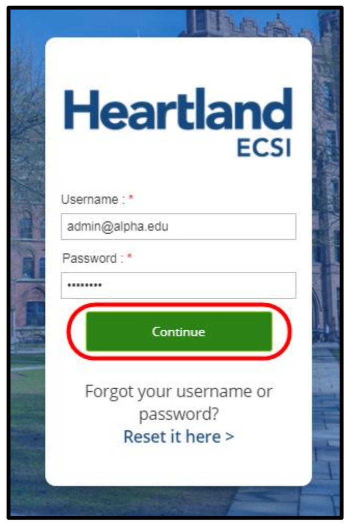
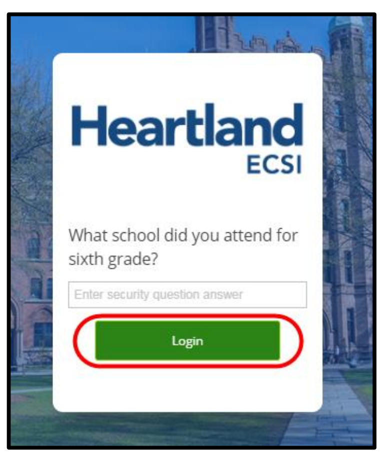
Thank you.
ECSI Client Support

This email was sent by ECSI, PO Box 1238, Wexford, PA 15090
Office Hours: Toll-Free Phone, 1.800.437.6931, Monday to Friday, 8:00 AM to 8:00 PM EST.

Notice: This email message is for the sole use of the addressee(s) named above and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution of this message or any attachments is expressly prohibited. If you are not the intended recipient, please contact the sender by reply email and destroy all copies and backups of the original message.

1.2 Sign In

Clients access the ECSI EasyPath website using the following link: https://heartlandclient.ecsi.net. To access the Client Dashboard, users must enter their unique user name and password in the login screen. A user's professional email address serves as the **Username**, and each user must enter their unique secure **Password** as created during account activation.

Sign In	
Step 1:	From the ECSI home screen, enter the **Username** and **Password** in each appropriate field, and then click **Continue.** 
Step 2:	The **Security Question** appears. Answer one of three preselected security questions, and then click **Login.** 

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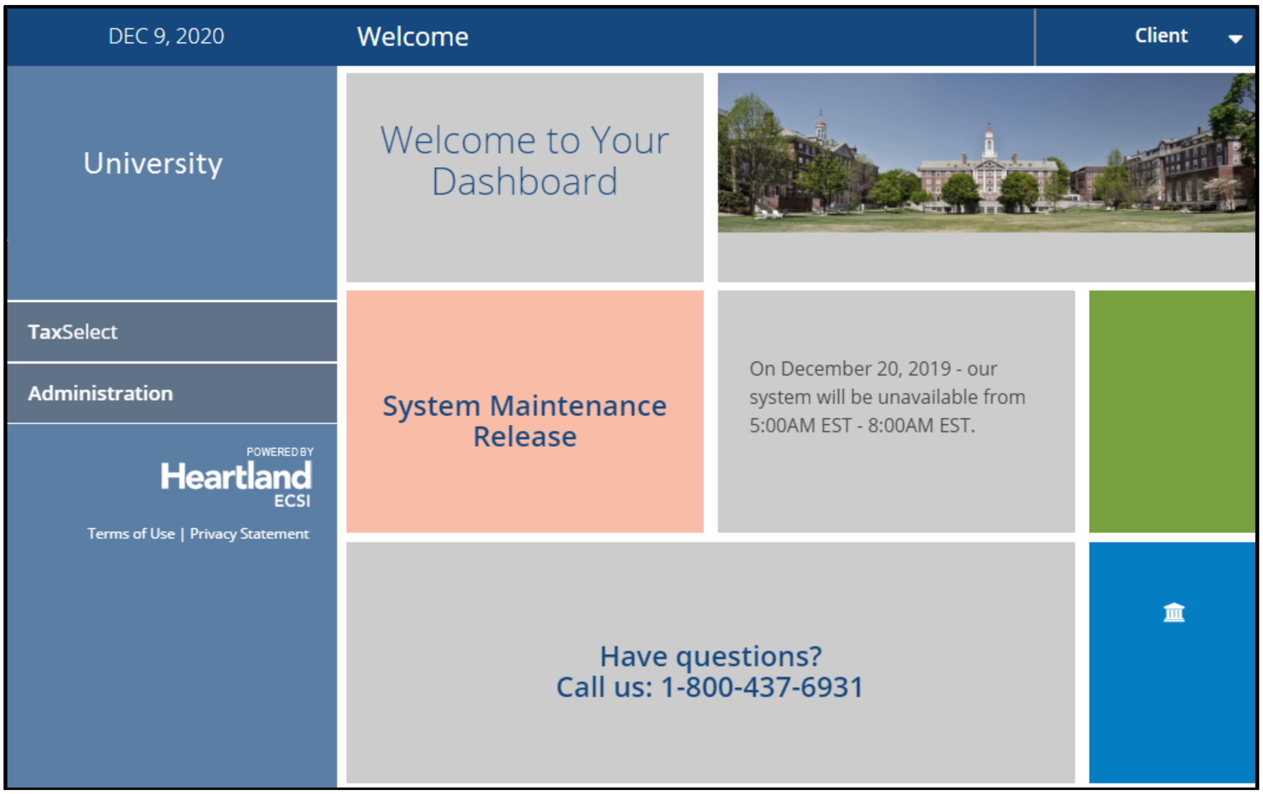
1.3 The Client Dashboard

Each client that logs in to the EasyPath Client Portal is presented with a client dashboard. The client dashboard provides updates regarding important regulatory information, scheduled maintenance, and contact information to ECSI's Client Support team. Clients have access to each of their Select Solutions managed by ECSI by clicking on the appropriate icon on the left side of the screen.



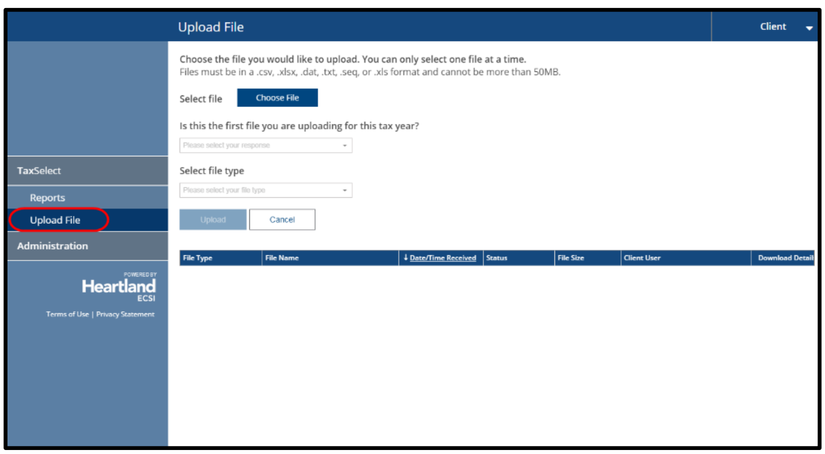
1.4 Uploading a 1098-T Data File

All 1098-T data files can be uploaded through the EasyPath Client Portal. Data files include the production file, address validation file, SSN Validation file, and any subsequent files including correction/replacement files, or files with additional data. By uploading a 1098-T data file through the EasyPath Client Portal, users are able to confirm the date/time the file was received, verify the file's status, and review previously sent files.

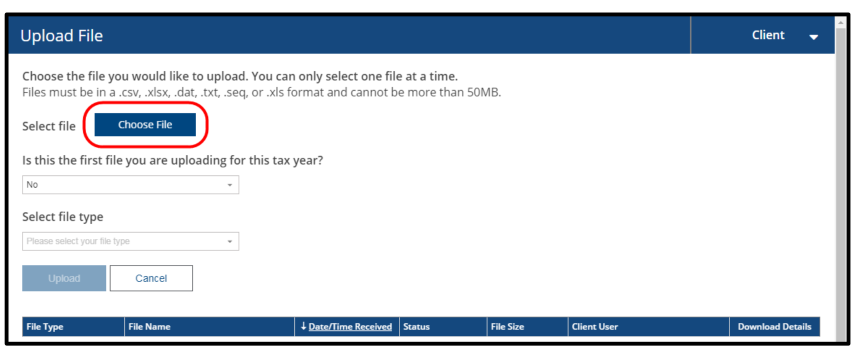
Notes: Files must be sent in a .csv, .xlsx, .dat, .txt, .seq, or .xls format. The size of a file cannot exceed 50MB. If the file size is greater than 50MB, the user must upload the file through ECSI's SFTP, and will not be able to complete the 1098-T data file upload process through the EasyPath Client Portal.

Uploading a File

Step 1: From the TaxSelect Dashboard screen, select the **Upload File** tab.

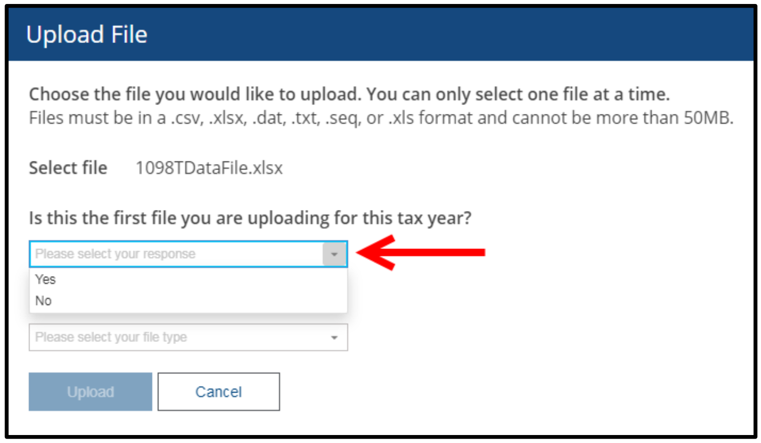


Step 2: Select the file you would like to upload by clicking the **Choose File** button.



Note: If the file being sent is greater than 50MB, the user must upload the file through ECSI's SFTP and will not be able to complete the 1098-T data file upload process through the EasyPath Client Portal.

<table>
<tr>
<td>Step 3:</td>
<td>Identify if this is the first production file being uploaded for this tax year by selecting Yes or No from the dropdown menu under ‘Is this the first file you are uploading for this tax year?’



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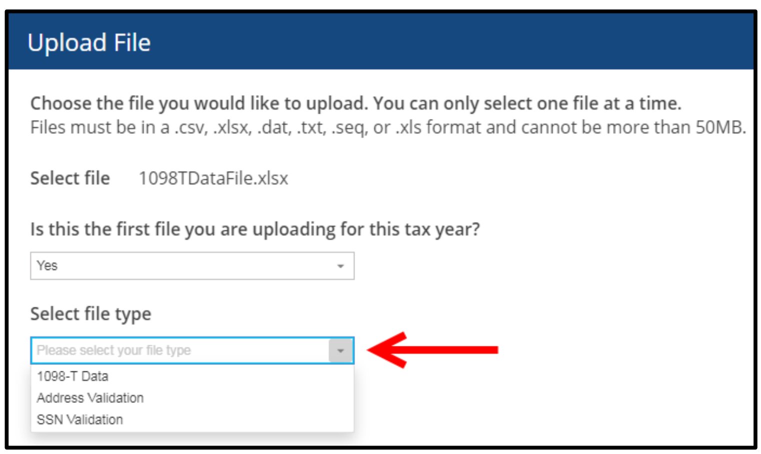
<td>Step 4:</td>
<td>Choose the file type being uploaded by making a selection from the Select file type dropdown menu.



Note: The options available under the Select file type dropdown will change based on whether the user has selected Yes or No in the previous step.</td>
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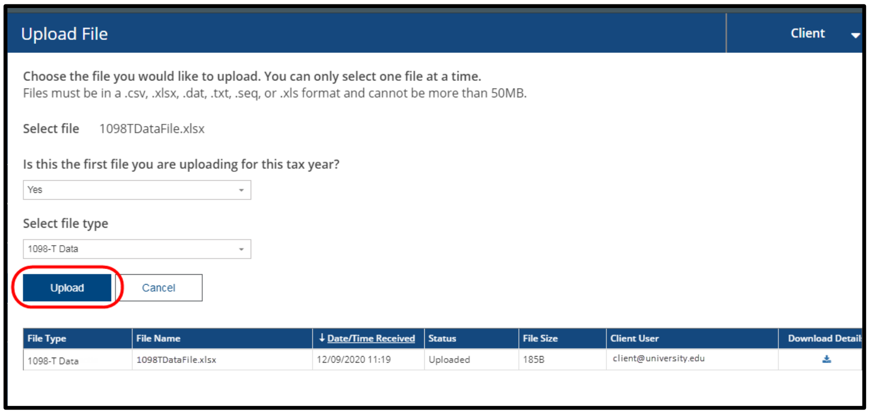
<td>Step 5:</td>
<td>Click the Upload button. File details will then be displayed in the chart below.



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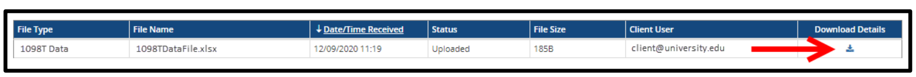
<td>Step 6:</td>
<td>Users can review the details of any previously uploaded file by selecting the icon under Download Details.



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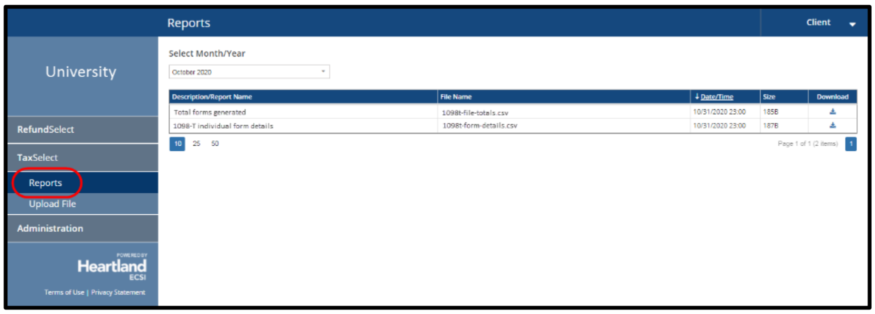
1.5 ECSI Report Access

ECSI provides clients with reports that are used to oversee and manage TaxSelect servicing. These reports are accessed through the EasyPath Client Portal within the TaxSelect dashboard under the **Reports** tab.

Accessing Report	
Step 1:	From the TaxSelect Dashboard screen, select the **Reports** tab. 
Step 2:	Select the **Month/Year** of reports you would like to view from the **Select Month/Year** dropdown. 
Step 3:	To open a report, select the **icon** to the right of the report in the **Download** column.