



TEXAS A&M UNIVERSITY

Student Business Services



eRefunds

Strategic Communications Campaign

May, 16th Meeting

Objectives

- To inform students & parents that Flywire will be the new Refunds servicer for Texas A&M University
- To encourage students to sign up for Direct Deposit through Flywire and show them how.
- To give students & parents a heads-up about future communications from Flywire
- To minimize service inquiry so that students and parents don't have to reach out to AOS about Refunds
- 979-775-5050, ext. 1429.

Target Segments

External Constituents

- ALL Students
 - Returning
 - Summer enrollees as of 6/29 & Vet students
 - Returning in the Fall 2022
 - Mays students
 - Incoming
 - NSC students starting on 5/19
 - Watch out for an email about **when** to sign up
- Parents/Authorized Users
 - PPL AUs
 - AUs of Returning Students

Internal Constituents

- SBS Staff
 - CS
 - GV
- Other Departments
 - SFAID
 - AOS
 - Mays
 - Law School
 - Dental School
 - Pharmacy
 - UAC ListServ
 - Controller Connection
 - LAUNCH/REU
 - Athletics
 - ISS

Timeline for Messaging

Summer 2022

- Returning Students
- Incoming Students
- Parents/ Authorized Users
- Others

Fall 2022

- Returning Students
- Incoming Students
- Parents/ Authorized Users
- Others

Channels

- Email Campaign
 - Update Existing CCM Templates
 - New email to be sent BEFORE Flywire begins to send its emails
 - Potential other one-off emails
- Web Campaign
 - SBS Website + Aggie Answers
 - AOS Website
 - CCM Blue Info Alert
 - SFAID Website – Keep them in the know
 - Howdy – My Finances – Refunds Channels
 - Yellow Howdy Alert

Channels

- Social Media
 - SFAID
 - MarComm
 - A&M Today
- Texting

Tools We Have

- Email

- One-off campaign
- CCM Emails

- Web Campaign

- SBS website
- Tutorial Video?

- Social Media

- SFAID
- MarComm
- AOS?

- Texting

- Quiq
- Call'em all

Action Items

- When is Flywire turning on eRefunds button? - Peggy
- Review Flywire notifications – Ivan
- Pulling the lists – Peggy & Shalon/Charles
- Refunds Business Card – Marnie & Mary
- Reviewing the CCM Templates & Communications Plan – Amelia & Ivan
- Job Aids - Amelia
- Draft initial communication for SBS - Ivan

Our Team

- Peggy Carey (SBS)
- Amelia Campos (SBS)
- Shalon Nicks (EIS)
- Marnie Smith (SBS)
- Mary Hauffe (SBS)
- Ivan Matip (SBS)

May, 26th Meeting

Peggy's Updates

- We can turn on the eRefund tab whenever we decide to
- The initial communication would need to be a NEW CCM template
 - ALL Students must sign up for Flywire even though they must do it right now with Heartland.
 - June 29 we're going LIVE. You need to sign up for Flywire
- Change the new CCM communication after 6/29
- Howdy pop-up we used during covid. We can use that pop-up again to "annoy" Howdy users
- Can someone from the Howdy team join one of our upcoming meetings?
- Adding an email tagline at the bottom incidents when AOS, SBS and SFAID email a students

Action Items - Updates

- When is Flywire turning on eRefunds button? – Peggy
 - Anytime we want
- Review Flywire notifications – Ivan
 - With proper access, we can review the notifications
- Pulling the lists – Peggy & Shalon/Charles
 - Flywire is working on sending us the info we need
- Refunds Business Card – Marnie & Mary
 - Step-by-step to set up direct deposit from the Howdy portal
- Reviewing the CCM Templates & Communications Plan – Amelia & Ivan
 - Ivan will take care of this.
- Job Aids – Amelia
 - Amelia began to put together a job aid that will help us with the step-by-steps instructions
- Draft initial communication for SBS - Ivan

Action Items for next meeting

- Meeting on Tuesday, May 31,
1:30 – 3:00 PM
- Ivan will start working on the
initial communication Tues.
morning
- Business cards from years ago –
Peggy will try to find it.

May 31st Meeting

May 31st Meeting

- Two links to Set up with ECSI & Flywire
- Terri will email a sample of what the Yellow alert would look like
- SBS will provide text for what it needs to say
- Update the yellow banner and schedule I from this date to this date

Action Items

- Draft and review different versions on the initial communication for SBS - Ivan
- Review Flywire notifications – Ivan
- Scheduling Enrollment status files with Flywire – EIS
- Pulling the lists – EIS
 - Enrollment lists for Summer & Fall
 - PPL will be for the second wave of communications (Fall 2022)
- Refunds Business Card – Marnie & Mary
- Reviewing the CCM Templates & Communications Plan – Ivan
- Finalize the Job Aids - Amelia

June 9th Meeting

Targeted Recipients (Updated)

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- ALL Students
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Action Items

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 - Enrollment lists for Summer & Fall
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Updates

- Turn on the eRefund tab on Wed.
- Send out initial communication



How to Set up Flywire eRefunds

1. Go to howdy.tamu.edu and log in using your NetID and password
2. Select the Payment/Refund icon to be directed to the bill payment suite
3. From the eRefunds tab select Enroll for eRefunds
4. Fill out all required banking information and agree to the Terms and Conditions
5. Click on Submit
6. Review and Confirm

Texas A&M University
REFUND servicer is changing
from Heartland ECSI to
Flywire!

Please sign up for direct
deposit with FLYWIRE to
**prevent delays in delivery
of your refunds.**



eRefunds Benefits

- Your payment and Refund information accessible from one place: the bill payment suite
- The eRefund tab display from the dashboard
- Future financial aid and credit balance delivered timely and accurately

Direct Deposit with Flywire - The easy way to get your refunds

June 23rd Meeting

Roundtable Updates

- Shalon & Terrie – Move Comms to PROD
- Still working with the technical team to identify the right population and recipients for the emails
- 4-hour window to send the emails 50,000 each (2 batches of 5) – pop cells
- EIS will be able to eliminate the alerts once they sign up.
- EIS recommends to change the subject line and make it more generic (remove the 2nd notice.)

Roundtable Updates

- Ivan, Amelia, Marnie & Mary – Prepared the initial communication
- Got the business cards, postcards and half-sheets printed and ready
- Updated the Financial Matters presentations
- Informed students and parents during NSC Resource Tables

Next Steps

- Get the text msgs out to the students on Monday.
- EIS will continue to run the jobs and get the next wave of emails out to the students
- Amelia will get the Job Aid ready by end of the week
- Peggy will send an update to AOS and Financial Aid

July 7th Meeting

Roundtable Updates

- Tomorrow, EIS will not generate any refunds
- EIS will turn off all Heartland refunds and turn on all Flywire refunds on Friday 3 PM
- ARB Refund Email can wait until after 3 PM tomorrow to be changed
- Updates 4 ARB templates: STDNTS GRAD & CRED BAL by Thurs. UNCSH RFD N & T on Monday if we go live

July 14th Meeting

Updates

- Testing is ongoing - Waiting on returns from Wells Fargo. Flywire seems ready.
- Refunds generated this morning. Those will be sent to Heartland, though a couple of them would need to be reversed.
- Include some Flywire DD information in the Balance Due email – Ivan to work with Kathryn and Katie to insert that information on there.
- SBS has begun to craft messages for end of July-beginning of August: Text messages, social media posts, etc..
- Also reached out to Transportation Services to see what we need to do to get an advertisement in the buses for when students return to campus in the fall.
- Will get more printouts ready for SBS ACO, AOS.