

Client Training

TouchNet Client - Managing your 1098-T's





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1.0 Introduction

ECSI's TaxSelect Solution is designed to streamline client workflow and relieve your staff of the cyclical processes that need to be accomplished during tax season. All document generation, printing, mailing, online access, and reporting to the IRS is completed by ECSI.

This reference guide is intended to identify and explain the roles and responsibilities for the TaxSelect 1098-T product as it pertains to the client.

2.0 Objectives

At the conclusion of this reference guide, users will be able to:

- Identify key features of TaxSelect
- Review TaxSelect Client Requirements
- View the order of events for 1098-T processing
- Explain why a 1098-T form must be created
- Send and receive 1098-T files
- Define each box located on the 1098-T form
- View/update/create 1098-T forms
- Access and review 1098-T reports
- View the Student Access

3.0 What is TaxSelect?

In January of each year, eligible colleges, universities, or other post-secondary institutions are required to report the previous years' qualified educational expenses, tuition payments and financial aid receipts for each student to the Internal Revenue Service using form 1098-T.

TaxSelect offers clients the option to streamline the 1098-T creation and disbursement process by relieving the administrative burden involved with delivering the 1098-T tax form to the student.

ECSI will:

- Provide guidance for file processing
- Assist with validation of data gathered during file processing
- Load the data to populate the 1098-T form
- Assist with revalidation of the data in the 1098-T tax form
- Generate the 1098-T form (paper or electronic)
- Mail the 1098-T paper forms
- Provide customer service representatives to answer phone calls from students with questions about 1098-T tax forms
- Provide dedicated Client Support to answer phone calls from clients on how to create and view a 1098-T form
- Transmit the 1098-T student data to the IRS



4.0 1098-T School Requirements

Eligible educational institutions are required to file Form 1098-T for each student who has made a reportable transaction to the school and is enrolled for the reported year. Schools may only report payments received.

Reportable transactions include:

- Qualified tuition, required fees and course materials at any college, university, vocational school, or other post-secondary educational institution eligible to participate in a student aid program administered by the United States Department of Education.
- Educational fees paid to colleges or universities that are a required part of coursework. Such fees include lab fees, student activity fees, etc.

There are exceptions. Schools do not have to complete 1098-T forms for:

- Courses for which no academic credit is offered, even if the student is otherwise enrolled in a degree program.
- Nonresident alien students, unless requested by the student as addressed on a case by case basis.
- Students whose qualified tuition and related expenses are entirely waived or paid entirely with scholarships.
- Students, in some cases, for whom the school does not maintain a separate financial account and whose qualified tuition and related expenses are covered by a formal billing arrangement between an institution and the student's employer or a governmental agency.
- Dorms, health insurance, medical expenses, fees related to transportation and personal expenses incurred while attending a college or university.

5.0 How to Use the ECSI File Transfer Service

Clients are required to transmit their 1098-T data files to ECSI securely, via sFTP. If you need to install our sFTP software on your desktop, please email your request to <u>TaxDocs@ecsi.net</u>.

Note: Before installing the file transfer software, make sure you have your school's unique ECSI client code and sFTP password. The end user will require read/write/execute rights to the C:\1098-T folder. File transfer uses secure FTP over port 22. This port must not be blocked.

5.1 File Transfer Installation

The installation program is available at http://www.ecsi.net/1098T/1098T-SETUP.EXE. The program can run without saving it, or you can save it to a convenient location, such as your desktop. After installation is complete, you may delete the setup program.

If saved, double click on the file to launch the application. If you see a security warning, please select **Run**.



The following installation screen will appear:

ECSI 1098-T File Transfer Setup	23
ECSI ECSI	
1098-T FILE TRANSFER INSTALLATION, VERSION 4.2	
Client ID: FTP Password: Encrypted Key Password:	
Install Quit	

If you have an existing application with ECSI, the program will retrieve your client information and prepopulate the fields. Make any required changes necessary to these values. Each field must be populated for installation. If you do not have the required **Client ID**, **FTP Password**, or **Encrypted Key Password**, please contact ECSI's Client Support department for assistance at 800-437-6931.

Click the **Install** button. The program will notify you if any required information is missing. If necessary, click **"OK"** to close the message, then enter the required information and click **Install** again.

The File Transfer software will install. Installation status will be shown in a text area beside the **Quit** button. When finished, the program will notify you that the installation is complete. Click "**Yes**" to quit the program.

5.2 File Transfer Usage

Sending a File

To send an interface file to ECSI, the client must select the file from a Windows Explorer (My Computer) window and drag the file(s) on top of the File Transfer Icon installed on your desktop.





The client will be prompted to confirm the file transfer.



Click **OK**. The transfer may take some time based upon the file size. A confirmation message box will appear when the transfer is complete. All files sent will transfer to the 1098-T folder within your home FTP folder. After a file is uploaded, create a ticket to notify ECSI of the available file by emailing <u>TaxDocs@ecsi.net</u>.

5.3 File Approval & Form Publishing

After your file is received, ECSI prepares the file for presentment through the ECSI Administrative Portal. ECSI will send a TeamSupport ticket to the client once ready for review. Clients will be required to review their Web Reports within ECSI's Administrative Portal and notify ECSI of their approval by responding to the Team Support ticket. ECSI will then send the 1098-T load events to TouchNet within 48 hours of receiving the client's approval. Upon receipt of the 1098-T load events, TouchNet will make 1098-T links available on the student's account in an 'unpublished' state. Clients will need to review the incoming 1098-T data within TouchNet Bill + Payment from *eStatements > Manage 1098-T Load History*. Once the review is complete, clients need to publish the statements by clicking the **Send Notifications** button.



6.0 1098-T Timeline

During tax season, ECSI follows a set order of events to assist clients with managing their 1098-T forms. The following timeline occurs each year to maintain compliance with federal regulations and ensure the best possible service to schools and their student population.

1098-T Timeline				
September 24 th	ECSI communication/kickoff email is sent to all new and returning clients. 1098-T Timeline document and Frequently Asked Questions are distributed.			
October 13 th	1098-T Client Training opens for all clients. Each training session is presented live once a month. Videos of our TaxSelect training sessions are available on demand anytime on our client website.			
October 13 th to December 16 th	ECSI opens the 1098-T data file testing period. During this time, clients may provide ECSI with a 1098-T test data file and ECSI will process the file and post the results online.			
	Note: Clients are encouraged to only send a test file if the data file layout has changed from previous years. If you are using the updated ECSI data file with the added trailer record, there is no need to send a test file.			
October 19 th	Make sure Consent Manager is turned on for electronic-only 1098-T statements, and configure FEINs within TouchNet Bill + Payments.			
December 11 th	The "Data File Testing Period is Ending " email communication is sent to all clients.			
December 16 th	1098-T data file testing period ends. No new test files will be accepted by ECSI. An email communication is sent out to all clients indicating the testing period has closed.			
December 28 th	The "Test Data Will Be Purged " from the website email communication is sent to all clients.			
December 30 th	Deletion of test data. All 1098-T test data is purged from the ECSI Client Website.			



1098-T Timeline				
January 4 th to January 13 th	The 1098-T data file production period will begin. During this time, clients must provide ECSI a 1098-T production data file. Clients are encouraged to provide production data as soon as possible.			
January 8 th	"1098-T Data File Production Period Ending" email reminder sent to all clients.			
January 13 th	1098-T data file production period ends.			
January 18 th	"Production File Approval Due" email reminder sent to all clients.			
January 20 th	 ECSI requires that all processed 1098-T production files be reviewed and approved by this date. If your file is not reviewed and approved by this date, ECSI cannot guarantee that your statements will be printed and mailed by the IRS deadline (January 31st). Note: If approval is not received by this date, an additional rush fee of up to \$1 000 00 will be assessed to your account 			
January 31 st	 This is the IRS deadline for all 1098-T statements to be printed and mailed. All forms must be postmarked no later than Sunday, January 31st 2021. Note: The final drop-off for USPS is Saturday, January 30th 2021. Due to COVID-19 restrictions, this date is subject to change. Any changes to this date will be communicated in a timely manner. 			



1098-T Timeline				
February 1 st	ECSI will open the 1098-T correction period. During this time, clients can create, edit or delete 1098-T statements online using the " Create/Edit Tax Documents " feature on the ECSI Website. All statements created/edited during this period will be automatically submitted to the IRS at the end of each month as part of the original submittal by March 31 st 2021. There is no need to contact ECSI when a correction is made online.			
February 1 st to	ECCL will distribute the TaySalast 1009. T Invoice to alight aborthy after the			
February 26 th	deadline to mail forms on January 31 st . This invoice is due by April 1st.			
March 2021	1098-T live client training sessions end.			
	The training videos will still be available on demand anytime on our client website under the 'Training' link in the 'Documents'.			
March 15 th	Correction period closes. Deadline to submit a correction/addition file prior to the IRS submittal.			
March 25 th	Deadline for manual adjustments and corrections. Access to the 1098-T portion of the ECSI website will be closed at the close of business. Manual adjustments and corrections to 1098-T forms online must be completed by 5:00pm Eastern Time. This will allow ECSI to begin extracting the data and building the IRS file.			
March 31 st	End of submittal period for 1098-T statement data to IRS. ECSI will submit the 1098-T statement data to the IRS no later than this date.			
April 1 st	Access to the 1098-T portion of the ECSI website will be reopened.			
April 1 st to July 30 th	 ECSI will submit all new and corrected 1098-T data to the IRS once a month. There is no need to contact ECSI when a correction is made online. Note: IRS penalties may be applicable to all new and corrected 1098-T data submitted to the IRS after the original filing deadline of March 31st 2021. 			
August 1 st	End of submission of new and corrected 1098-T Data to the IRS. ECSI will no longer automatically submit new or corrected 1098-T data to the IRS. Clients are required to contact the IRS directly to provide detail on why the 1098-T statement data is being reported after the filing deadline. The IRS will provide guidance on how to submit the new and/or corrected data. Note: IRS penalties may be applicable to all new and corrected 1098-T data submitted to the IRS after the original filing deadline of March 31 st 2021.			



7.0 Gathering Consent for Electronic-Only 1098-T Statements

Clients with integrated 1098-T services can use the features of TouchNet Bill + Payment to gather consent for electronic-only presentation of 1098-T statements. TouchNet will then provide ECSI with a file for each institution containing the information for students who have given this consent. These files are provided to ECSI upon request from ECSI once the 1098-T file is ready for processing.

	eStatements > Mar	nage 1098-Ts and clic	k on the 1098-T C	Configuration Tab.
		Load Options Load History 1098-T Loader Options Load level validation threshold:	25 %	
		Profile Options Turn on paperiess 1098-7 option: Enable Consent Agreement: Presentation date range: (popals yearly)	® Yes ◎ No ® Yes ◎ No Econo Monthe Tan ▼ Dave 31 ▼	
		Duration of agreement: (0 years = permanent) Mask SSN on the form: Display zero amount boxies as blank:	To Monthe Dec V Day: 31 V 0 years 0 Yes No	
		Agreement Text Enter the paperiess 1098-T agreement below, up to 400 10/19/18 IRS regulations state that each student who file	0 characters.	
		108-1 checktonickalij midić kalo providenjih midić kalo providenjih midić kalo providenjih midić na providenjih midić providenjih midić providenjih midić providenjih midić providenjih midić providenjih midić. Prathemore, you agree to return to titis site i amalit di se voju ot 1098-7. Tivi tili scotteni to da on rim malici. If you eleto not to contenti, a paper copy of your be exist to povi va la 55 AML. «a inrefinitelju //www.touchnet.com/~vibit sur touchnet.	ectromically, ective your his his protocome reference T will NOT be 098-T will ittee/a>	
Step 2:	Under Profile Option Paperless 1098-T o	ns, select the Yes radio otion:' and 'Enable Col	b buttons to the rights buttons to the rights buttons to the rights but to be a set of the right but to	ght of 'Turn on '.
	Profile Options			
	Turn on paperless 10	98-T option:		🖲 Yes 🔍 No
	Enable Consent Agre	ement:		Yes No



Step 3:	Under Profile Options, set the Presentation date range during which students will be asked for their consent. The dates you select remain valid for succeeding years and you do not need to update them unless your own schedule changes.				
	Presentation date range: (repeats yearly) From Month: Jan V Day: 31 V To Month: Dec V Day: 31 V				
	Note : If a student logs in during these dates and has not yet made a consent selection, a prompt is displayed presenting the consent options. The student must at that time decide whether to consent.				
Step 4:	Under Profile Options, enter 1 year for the Duration of Agreement.				
	Duration of agreement: (0 years = permanent)				
Step 5:	Choose Yes or No to display a masked SSN in the online display of 1098-T files. If you select the Yes radio button, students will see their SSN in the format XXX-XX-[last four digits]. If you select the No radio button, students will see their full SSN displayed.				
	Mask SSN on the form: O Yes ® No				
Step 6: Choose Yes or No to mask any displayed zero amounts so that they appendix blank boxes. If you select the Yes radio button, student will see blank box zero amounts. If you select the No radio button, students will see \$0.00 a the boxes.					
	Display zero amount boxes as blank: O Yes ® No				
Note: This affects only the displayed statement, not the stored 1098-T Data					



8.0 Configuring FEINs

Clients must configure every FEIN (Federal Employer Identification Number) for which their institution issues 1098-T statements. Processing through ECSI requires a complete list of FEINs.

	Entering FEINs		
Step 1:	Go to eStatements > Manage 1098-Ts and click the 1098-T Configuration tab.		
Step 2:	Within the FEIN List, enter a FEIN in the space provided, then click Add.		
	Enter every FEIN for which your institution issues 1098-T statements. Processing through ECSI requires a complete list of FEINs.		
	FEIN Action		
	00-1234567 Remove		
	99-9999999 Remove		
	Enter FEIN:		
Step 3:	When you have added all FEINs, click Save at the bottom of the page.		

9.0 1098-T Form

Schools must provide the 1098-T form to any student who paid qualifying educational expenses in the preceding tax year (this means the 2019 1098-T form is used for payments made during the 2018 calendar year). Schools can no longer report qualifying expenses based upon how much a student was billed during the preceding year. Schools can only report qualifying expenses based upon how much a student paid in the preceding year.

This form (1098-T) is used to determine eligibility for the American Opportunity Tax Credit and the Lifetime Learning Credit as part of The Taxpayer Relief Act of 1997 (TRA 97).

Qualified Tuition and Related Expenses			
Included	Not Included		
 In state or out of state student: Resident in State 	Late Charges		
and Non-resident tuition	Application fees		
 Graduate and Undergraduate Program Tuition 	Processing fees		
 Required fees: student activity fee, technology 	 Medical Expenses (including student health 		
fee, student services fees and fees required as a	fees)		
part of enrollment	Room and board charges		
 Withdrawal's not waived or reduced, and 	 Similar personal, living, or family expenses 		
required to be paid or were billed to student	Transportation		
	 Registration fees paid for non-credit courses 		



9.1 Schools Responsibility for Creating a 1098-T

The following steps listed below detail how the 1098-T form is created:

- 1. A file is created by the school that contains a list of attending students, the amount the student has paid during the year, and if the amount has been paid or billed.
- 2. The school sends the file to ECSI.
- 3. An email is sent to the school stating that the file has been successfully loaded. The school reviews the data from ECSI for accuracy.
- 4. The school confirms the data to be correct. The school emails ECSI to generate the 1098-T forms (paper and electronic).
- 5. A separate email is sent to the student with the student's Heartland Key. This information allows the student access to the 1098-T that is on file online.
- 6. The student retrieves or receives their 1098-T and either use the form to file taxes, or will need to request a change to the form.

9.2 Defining the 1098-T Form

The 1098-T form contains several fields of information identified below.

address, city or town and telephone number	state or province, country, ZIP of	 Payments received for qualified tuition and related expenses 	OMB No. 1545-1574	
		\$	2020	Tuitio Statemer
			Form 1098-T	
entification no. STU	DENT'S TIN	3		Copy For Studer
		4 Adjustments made for a prior year	5 Scholarships or grants	This is importation
		\$	\$	and is beir
ding apt. no.)	d 7ID or forcion postal codo	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period	IRS. This for must be used complete Form 886
province, country, an	u zir or loreign postal code	\$	beginning January- March 2020	to claim education credits. Give it to the
t. No. (see instr.)	8 Check if at least	9 Checked if a graduate	10 Ins. contract reimb./refund	tax preparer or use it to prepare the tax return
	half-time student	student	ŝ	propure the tax ford



1098-T Form Detail				
Box Name	Definition	Key Points		
Student's Address	The student's home mailing address.	Per IRS regulations, this box should contain the student's home address where he or she can receive mail.		
Student Social Security Number	The student's social security number or the student's taxpayer identification number.	The IRS processes 1098-T forms using Social Security numbers. If the school is not able to obtain the student's taxpayer identifying number using the W-9S or the Student's or Borrower's Taxpayer Identification Number and Certification forms, then the school will check this box.		
Information contact and service provider	Contains the client's filing information and a contact number to the school.	Schools must provide a name, address, and telephone number. The phone number cannot be a general number to the college or university. In addition, the third party processor (ECSI) will be included here.		
Account number	An additional account number in the event the student has multiple accounts.	The account number is required if the student has multiple accounts. Schools typically use the student ID number or a designated account number that is assigned to the student.		



Box 1: Payments received for qualified tuition and related expenses	The amount of payments made in the previous year for qualifying expenses. Includes tuition and required fees.	The amount reported is reduced by refunds made towards qualifying expenses in the same year
		This amount is not reduced by grants and scholarships
		If box 7 is checked this will include paid amounts for qualifying expenses for Jan., Feb and March of 20XX.
Box 2: Amounts billed for qualified tuition and related expenses	The amount billed in the precedent year for qualifying expenses. Includes tuitions and required fees.	As of 2018, this box is no longer in use. This is no longer a valid method of reporting on the 1098-T form.
*NOTE: As of 2018, this is no longer a valid method of reporting on the 1098-T form.	The amount reported is reduced by refunds made towards qualifying expenses in the same year.	
	This amount is not reduced by grants and scholarships.	
	If box 7 is checked this will include paid amounts for qualifying expenses for the Jan. Feb and Mar of 20XX.	
Box 3: If this box is checked, your educational institution has changed its reporting	This box will be checked if the school changes its method or reporting.	As of 2019, this box is no longer being used on the 1098-T form. All reporting
method for 0000	The school must notify the IRS 3 months in advance of this change.	method changes would have taken place in 2018.
*NOTE: As of 2019 this box is no longer in use.		



Box 4: Adjustments made for a prior year	This box includes any reimbursements or refunds made to qualifying educational expenses in prior years.	Includes amounts that were reported for any prior year after 2002.			
		This adjustment only references box 1 or 2 and will only reduce or increase amounts reported on previous years 1098-T.			
Box 5: Scholarships or grants	Total amount of scholarships or grants processed for the payment to qualifying educational expenses.	These are monies received from third party and does not include loans.			
		Include payments from the military, religious and nonprofit organizations.			
		Pell, FSEOG Grants are included in the amount.			
Box 6: Adjustments to scholarships or grants for a prior year	Total amount of scholarships or grants processed to reduce the payments to qualifying educational	Includes amounts that were reported for any prior year after 2002.			
	expenses.	These adjustments only reference adjustments made to previous year amounts in box 5.			
Box 7: Checked if the amount in box 1 includes amounts for an academic	For any payments or amounts billed for qualifying educational expenses paid in 2019 but are for educational	The amounts reported in box 1 are for a 15 month (1 year and 3 months) period.			
March		Students who will graduate at the end of 2019 or in 2020 usually have box 7 checked.			
Box 8: Checked if at least half-time student	This box is checked if the student was half-time during 2019.	Half-time status differs for each school.			



Box 9: Checked if a graduate student	This box is checked if the student was enrolled in a graduate program during 2019.	If box 7 is checked the reporting period is for 15 months (1 year and 3 months). If a student is enrolled and has
		not started classes, then this box will be checked.
Box 10: Ins. Contract reimb./refund	For insurance policy (Medical withdrawal or life event, the student may tax insurance to cover the cost of tuition).	If the student was reimbursed under an insurance policy. These policies are applicable if the student was forced to withdrawal from school for medical or family reasons and was later reimbursed.

10.0 The 1098-T Client Menu

Clients are able to create, view and update 1098-T tax forms, view 1098-T reports, and review student account memos by accessing the client portal of the ECSI website.







10.1 1098-T Tax Documents Overview

WebX provides access to various tax management tools including access to **view/edit/create** tax statements, review **web reports**, and send **secure messages** to ECSI.

Menu	
Tax Documents View Tax Statements Create/Edit Tax Statements Electronic 1098-T Opt-In Report Find PIN/Password	Client Features Web Reports Secure Messages
Account Administration Change My Password Logoff	



10.2 **View Tax Statements**

1098-T tax statements are not available until the client sends the 1098-T interface file to ECSI. Once the file is processed and the tax forms are approved by the client, ECSI loads the 1098-T forms to the website. Within 24 hours after this step, a student's tax form is available for review. The View Tax Statements link provides access to view a student's 1098-T form.

	View a Student's 1098-T Form
Step 1:	From the Client Website, click View Tax Statements.
	Tax Documents View Tax Statements Create/Edit Tax Statements Electronic 1098-T Opt-In Report Find PIN/Password
Step 2:	On the View Tax Statements screen, the client can enter the student's Social Security Number, Student ID, Last 4 SSN, or Last Name and click Find next to the chosen search option.
	View Tax Statements
	Click here for the ECSI TaxSelect 1098-T Handbook PDF Message:
	To search for a statement
	 Enter the search criteria below Click the respective FIND button next to the search field The search results should be displayed on screen
	To view the statement
	 If searching by Social Security Number Check the radio button next to the tax year Click the VIEW button at the top of the report The tax statement should open in a new tab/window If searching by Student ID, Last 4 SSN or Last Name Check the radio button next to the record Click the RETRIEVE button at the top of the report A list of the student's 1098-T statements should be displayed on screen Check the radio button next to the tax year Click the VIEW button at the top of the report The tax statement should open in a new tab/window
	Social Security Number (no punctuation): [[Find] Student ID: [Find] Last 4 SSN: [Find] Last Name: [Find]



Step 3:	A list of 1098-T's ma desired form, and cli	tching the search criter ck View .	ia entered appea	ars. Click the radio	button next to the
		Social Security Number (no	student ID:	1 [Find] [Find]	
		Below are the tax documen	Last 4 35N: Last Name:	[Find]	
		View Year Type St 2019 1098-T 2018 1098-T 2017 1098-T 2015 1098-T 2015 1098-T 2014 1098-T	ıppress		
Step 4:	The 1098-T form ope	ens in the View Tax Do	cuments screer	1.	
	FILER'S name, street address, c foreign postal code, and telepy ECSI Demo University 100 Global View Dr Warrendale PA 15086	ity or town, state or province, country, ZIP or one number	1 Payments received for qualified tuition and related expenses \$1,200.00 2	OMB No. 1545-1574	Tuition Statement
	Contact: 412-788-3900 ECSI: 866-428-1098 FILER'S federal identification m 9999999999	STUDENT'S taxpayer identification no. *****1111	3		Copy B For Student
	STUDENT'S name, street addre BILL MAZEROSKI 115 FEDERAL STRE	es, city, state, and ZIP code	4 Adjustments made for a prior year	S Scholarships or grants	This is important tax information and is being furnished to the
	PITTSBURGH PA 15	5112	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2020 []	Internal Revenue Service. This form must be used to complete Form 8863 to claim education credits. Give it to the
	Service Provider/Acct No. (see 1111111 Form 1098-T	Instr.) 8 Checked if at least half-time student (keep for your records)	9 Checked if a graduate student [] www.irs.gov/1098t	10 Ins. contract reimb./refund Department of the Treasury-Inte	tax preparer or use it to prepare the tax return.
	in you have any general information for ECSI. If Neither your school not	questions, prease visit http://www.ecsi.net, you have any questions regarding the finance ECSI can answer tax questions or provide to Transaction History	cial information on your 1098-T, ax advice, you must contact you	please contact your should be and a should be should be should be a should be	tly.
	Trans Date Box #	Trans Description Trans An	nt Trans Date	Box # Trans Description	Trans Amt
	Note: If the client hat are located at the bo	is reported paid information to the set of t	ation on the 1098 ge.	3-T form, itemized	transaction details



10.3 Create or Update a 1098-T

Clients have the ability to create or update an existing tax form in the event the student's information was not a part of the initial file sent to ECSI for processing, or if the tax form contains information that is incorrect. The following steps review how to enter and edit a 1098-T tax form online.

	Create or Update a Student's 1098-T Form
Step 1:	Locate the menu heading called Tax Documents, and click the Create/Edit Statements link. Tax Documents View Tax Statements Create/Edit Tax Statements Electronic 1098-T Opt-In Report Find PIN/Password
Step 2:	On the Create/Edit Tax Statement (1098-T) screen, enter the Tax Year and the student's Social Security Number in the Social Security Number (no punctuation) field, and click [Find SSN] to locate an account by the student's SSN. If the student does not have a social security number, choose the [Retrieve EAN] option to create an ECSI Account Number. Create/Edit Tax Statement (1098-T) To create or edit a 1098-T statement: Enter the Tax Year Enter the Tax Year Click the Find SSN button Enter the tax statement information below Select the appropriate action from the ACTION dropdown Click the SUBMIT button Tax Year 2020 (YTM7) Social Security Number (no punctuation) 11111111 (SSN = Social Security Number; EAN = ECSI Account Number. Please no hyphens.) [FIND SSN] [RETRIEVE EAN]



		CORRECTED		
	FILER'S name, street address, city, state, ZIP code, and telephone number	1 Payments received for qualified	d OMB No. 1545-1574	
	ECSI Demo University 100 Global View Dr	tuition and related expenses	2020	
	Warrendale PA 15086	2 Amounts billed for qualified	2020	Tuition
	Contact: 412-788-3900 ECSI: 866-428-1098	tuition and related expenses	1038-1	
	FILER'S federal identification no. STUDENT'S taxpayer identificat 999999999 111111111	ion no. 3 If this box is checked, your edu has changed its reporting metho	ucational institution of for 2020	Copy E
	STUDENT'S name, street address, city, state, and ZIP code	4 Adjustments made for a	5 Scholarships or grants	-
	First/Middle/Last: BILL	prior year	0.00	This is importan tax information
	MAZEROSKI	0.00	0.00	and is being
	Addr 1: 115 FEDERAL STREET	6 Adjustments to scholarships or grants	7 Checked if the amount	- furnished to the Internal Revenue
	Addr 2:	for a prior year	amounts for an	Service
	City, State: PITTSBURGH 🛛 🕇 PA	0.00	beginning January -	
	Zip - Zip+4: 15112 -			
	Service Provider/Acct No. (see instr.) 8 Checked if at least	9 Checked if a	10 Ins. contract reimb./refund	1
	LINSIT-TIME STUDENT	C graduate student		
		B.	0.00	
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🖉 Updat	te Detail?	Tra	ansaction Details
# Box	Date mm/dd/yyyy	Desc	Amt
1			
2			
3			
4			
5			
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8			
9			
10			
The Action Choose the Please Sele Please Sele Create New Update Exis View Print F Delete This	box is used to comple correct action and clic ect Statement trig Statement Statement	ete the appropriate update a ck [SUBMIT]. BMIT] elick "Send Email" to send a no ated/edited.	as entered by the client in S otification email to the studen [Send Email



Step 6:	The client can send an email to a student to review their updated or new 1098-T application by entering the student's email address in the Email Address field and then clicking [Send Email] .
	Enter an email address below and click "Send Email" to send a notification email to the student that their 1098t form has been created/edited. Email Address: Student@university.edu [Send Email]

Notes: ECSI does not automatically print and mail statements for new and/or corrected tax forms after the original 1098-T production file is processed. Clients can send the student an email notification using WebX.

ECSI allows clients to generate 1098-T statements for a prior tax year manually online or via a data file in one of our accepted formats. 1098-T statements generated for a prior tax year are not automatically printed/mailed to the student. 1098-T statements generated for a prior tax year are also not automatically submitted to the IRS as the reporting period for the prior tax year has been closed. Clients should contact the IRS directly to discuss the need to submit a statement for a prior year as the IRS will provide guidance on how to report the data. Clients can reach out to the IRS by dialing 866-455-7438 or by web at www.irs.gov.

11.0 Web Reports

Web Reports is a collection of data organized by a particular topic to provide information to a user for a population of borrowers/students. Web reports are available for clients via WebX, ECSI's web portal. ECSI creates each report and delivers for the user on WebX for pickup. 1098-T reports are run, updated, or loaded to the ECSI website when interface files are provided and processed by ECSI, and in April with a detailed list of each statement that was returned to ECSI as being undeliverable.

11.1 View Web Reports





Step 2:	Web Reports are organized by month. Select the correct month from the Period drop- down box, and then click the Show link.
	View Web Reports Please Read! SAL System Monthly Reports SAL System Special Reports SAL System TPP Reports SAL System TPP Reports Important Changes to WebReports This page contains links to PDF documents, if you do not have Adobe Reader installed please follow this link to install it, Message: Period: 01/2020 (Show) [Menu]
	Note: Web reports are available for up to four years online. After four years, reports can be made available to clients on request.
Step 3:	A list of available reports will display. The column headers are:
	Category: The type of report.
	File: The name of the report (by report file name).
	Date/Time: The date and time that the report was generated.
	Size: The size of the file in bytes.
	Description: A short description of the purpose of the report.
	Period: 10/2019 - [Show] [Menu]
	ViewCategoryFile Date/Time Size Description [+] [+] [+] [+] [+] [+]
	[v] TAX 1098t-file-statistics.txt 10/31/2019 14.03 684 Processed file statistics
	[V] TAX 1098t-file-totals.csv 10/31/2019 14.03 182 Total forms generated
	[v] TAX 1098t-form-details.csv 10/31/2019 14.05 81,629 1098-T individual form details
	TAX 1098t-warnings.csv 10/31/2019 14.05 1,267 1098-T warnings
	To view a report, click the [V] next to the appropriate report Category .



11.2 1098-T Reports and Descriptions

ECSI provides five reports for clients regarding the 1098-T process.

1098-T File Totals Report– This report provides a summary of the data contained in the processed 1098-T interface file with ECSI. The report provides totals for each box in the 1098-T form that contains financial information. ECSI summarizes the total for each student in the 1098-T file for Box 1: Payments received for qualified tuition and related expenses, Box 4 for Adjustments made for a prior year, Box 5 Scholarships or grants, and Box 10 for Insurance contract reimbursement/refund. This report can be used to confirm that the data processed by ECSI matches the summary totals reported by the client.

V TAX 1098t-file-totals.csv 01/09/2018 12.16 237 Total forms generated

1098-T File Statistics Report– This report provides statistics from the processed 1098-T file between ECSI and the client. The report provides the client with the number of 1098-T forms that contain information for each box on the 1098-T application, as well as the financial detail contained in the 1098-T Batch Total Report. The report also contains the total number of students provided in the file and validation error totals.

V SAL 1098t-file-statistics.txt 01/09/2018 12.24 663 Processed file statistics

1098-T Form Details Report- The report provides a detailed listing of all information generated for each 1098-T statement for a client for a given tax period. The client can use this report to review the processed data for each student for a specific tax year as well as review each potential warning for the student.

V SAL 1098t-form-details.csv 01/09/2018 12.39 238,761 1098-T individual form details

1098-T Warnings Report- This report provides a detailed listing of all students who have a warning or potential error on their 1098-T form. The client can utilize this report to review potential errors on the generated tax form that may need corrected for students and correct the 1098-Ts as needed.

V] TAX 1098t-warnings.csv 01/09/2018 12.26 394 1098-T warnings



Possible 1098-T Warnings				
SSN not valid	SSN provided is invalid, ex: only 7 digits long, begins with 000 or 666.			
TIN Not Certified	The TIN Solicitation Certification is not marked for this student.			
Last Name Blank	The Last Name field for this student is blank within the file.			
First Name Blank	The First Name field for this student is blank within the file.			
Address Blank	The Address field for this student is blank within the file.			
City Blank	The City field for this student is blank within the file.			
State Blank	The State field for this student is blank within the file.			
Zip Blank	The Zip Code field for this student is blank within the file.			
ECSI EAN# Created	The SSN field for this student is blank within the file, an ECSI account number has been generated for use by the school in the ECSI client portal, the 1098-T form provided to the student will have the SSN field blank. When the form is submitted to the IRS the SSN will be blank.			
Name CTRL	This warning only displays when an IRS 1220.dat file has been submitted for processing from the school. This is only an FYI; this means that we were unable to match the Name Control the same way that the school did. This is usually seen when a student has more than 3 names, ex: John Eric Saint James. We maintain the schools Name Control when submitting to the IRS.			
Amounts Not Numeric	There is a non-numeric character in the amount fields. This pertains to Box 1, Box 4, Box 5, Box 6 or Box 10.			
Large Payments	The amount in Box 1 is over \$90,000.			
Large Adj Prior Year	The amount is Box 4 is over \$90,000.			
Large Grants	The amount in Box 5 is over \$90,000.			
Large Adj Grants	The amount in Box 6 is over \$90,000.			
Large Refunds	The amount in Box 10 is over \$90,000.			
Box1 and Box2 have amounts	There is an amount in both Box 1 and Box 2, should only have amounts in Box 1.			
Box1 is blank	There is no amount listed for Box 1 for this student.			
Box6 > Box5	The amount in Box 6 exceeds the amount in Box 5.			



1098-T Reject Report- The report provides the client with a list of each student in which the 1098-T form was returned in the mail to ECSI from the post office. Clients can use this report to reach out to students who may not have received their 1098-T form in the mail and assist each student with accessing the form online.

V SAL

1098t-reject-pd.pdf 04/15/2015 15.36 1,592 SAL Report

12.0 Student Statement Access

Students will opt into receiving 1098-T statements electronically and retrieve their electronic statements by logging into TouchNet's one-stop Student Account Center. If your institution uses Single Sign-On (SSO) integration, then your students will be seamlessly connected to TouchNet via your student system's self-service portal. Students have to remember one set of credentials throughout the entire experience.

Once the 1098-T Statements are available, students will navigate to the Student Account Center's **My Account** page and click the **View** button on the most recent available tax statement. This will automatically direct the student to an ECSI webpage which populates the 1098-T tax form.

My Account Make Payment Pay	rment Plans Deposits Refunds Help						My Profile
	Statements Most Recent Billing Statement You have no billing statements at this time. Current Account Balance Current balance includes activity since your last statement, in	luding recent payments and r	ew charges.				
	Account Description		Current Balance	Action			
	Student Account		\$2,148.00	Pay			
	1098-T Tax Statement						
	Tax Year			1	Action		
	2018				View	$\mathbf{)}$	
	Account Activity Since Last Statement Click a column header to sort the entries.				\sim		
	Description	Code	Date	/	Amount (\$)		
	Fed Direct Unsubsidized Loan	9U03	5/19/17		\$2,148.00		
				Total:	\$2,148.00		
	Yeer All Activity						

Note: It's important that the student's browser has pop-up blockers turned off.



13.0 ECSI Student Website: Tax Document Quick Search

ECSI provides students the ability to easily access and view their current and previous years 1098-T and 1098-E tax forms online at <u>https://heartland.ecsi.net.</u> Students will need their first and last name, social security number, and zip code to access their form. The information needed to access a student's 1098-T form must match the information provided to ECSI by the school to pass authentication.

13.1 Tax Document Search

Students looking to view their most recent or previous years 1098-T or 1098-E tax forms can do so by using the Tax Document Search option on the ECSI Website.

Search For Your Tax Document	
Step 1: Open your web browser and navigate to https://heartland.ecsi.net ← → C □ https://heartland.ecsi.net	
Step 2: Select the option on the ECSI home page Click here after Want to view you form?	r tax



Step 3:	Type the name of the school in the field School Name. Select the school from the list of available schools, and click Submit .
	Heartland ECSI Home Products & Services Help Center
	Search For Your Tax Document This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker, you the Tools or Settings under your specific browser.
	First, let's check to make sure your school has posted their tax documents.
	School Name (start by typing the first several letters of your school name) Heartland Heartland University
	Submit
	Note: Tax forms are only available if a school has released their tax file to ECSI for
	processing. If a school's tax file has not yet been released, the following message appears to the student:
	We could not locate your school's tax documents. Please try again later.
	School Name (start by typing the first savet all littles of your school name) Heartland ECSI University
	We're sorry. It looks like your school has not released their tax documents to our website yet. Please try again at a later date or contact your school for the expected release date. Please keep in mind that your school has until January 31, 2017 to post the tax document.



Step 4:	Students must pass authentication before viewing their 1098-T form. Enter First
	Name, Last Name, SSN, and ZIP code in the required lields.
	Chathan
	Search for Your Tax Document
	This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker for this site. To turn off your Pop-up blocker, while the Tools or Settings meeting the sure to turn off printing browser.
	We've found your school. Let's fill in the rest of the form to find your tax document. IMPORTANT: The information entered below must match the information your school has on file.
	School Name (start by typing the first several letters of your school name)
	Heartland University
	First Name
	Last Name
	55N
	Zip Code
	I'm not a robot
	incluidos Inser seo
	Continue
	Note: The information entered by the student must exactly match the information
	on file at the student's school.
Sten 5:	To complete authentication, check the box for Lam not a robot and verify the
0.000 0.	information requested by the website. Once completed, click Verify.
	Select all squares with street signs.



Step 6:	Click Continue .
	We've found your school. Let's fill in the rest of the form to find your tax document. IMPORTANT: The information entered below must match the information your school has on file.
	School Name (start by typing the first several letters of your school name)
	Heartland University
	First Name Training
	Last Name McTrainer
	504 X00-00-1111
	Zip code 15086
	I'm not a robot Copy Data Mover, Lease
	Continue
Step 7:	The Tax Document Information window appears listing the current year's tax
	torms.
	This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker, visit the Tools or Setting neur for your apecific browser.
	YOUR TAX STATEMENT
	The detail shown below is for informational purposes only. If you would like to access prior year tax documents, you will need to create a profile and connect your account. To learn how to connect your account, please visit the the Help Center.
	STATEMENT DETAIL FOR CURRENT REPORTING PERIOD
	Status: Delivered LUS Mail) *
	1098-E STATEMENT Status: (Not Available) +



13.2 Viewing Your Tax Statement Information

Students view their current 1098-T and 1098-E statements, if applicable, on the Tax Document Information window. Clicking on the + sign to the right of the delivery status provides the student's tax form detail, as well as printing and administrative options.

s site uses Pop-up windows for printing your tax documents. Please be sure to turn	off your Pop-up blocker for this site. To turn off your Pop-up blocker, visit the Tools or Se
YOUR TAX STATEMENT	our specific browser.
The detail shown below is for informational purposes only. If you would like to account. To learn how to connect your account, please visit the the Help Center	o access prior year tax documents, you will need to create a profile and connect you er.
STATEMENT DETAIL FOR CURRENT REPORTING PERIOD	
1098-T STATEMENT	Status: Delivered (US Mail) +

YOUR TAX STATEMENT	•			
STATEMENT DETAIL FOR CURRENT REPORT	ING PERIOD			
1098-T STATEMENT				Status: Delivered O –
Reporting Institution:	ECSI Demo University	Tax Year:	2018	View/Print Statement » You must turn off your pop-up blocker to view and print the tax form.
Delivery Address:	115 FEDERAL STREET, PITT	SBURGH, PA, 15112		
Box 1 ("Payments"):	\$1,000.00	Box 2 ("Charges"):	\$0.00	Make a Change » Select this option if you would like to update your SSN. Name or Address listed on your tax form.
BOX 3 ("Reporting Method Changed"):	No	BOX 4 ("Prior Year Adjustments"):	\$0.00	
Box 5 ("Scholarships & Grants"):	\$0.00	Box 6 ("Prior Year Adjustments (scholarships/grants)"):	\$0.00	Create a Dispute » Select this option if you disagree with information shown in the boxes of your tax form.
Box 7 ("Amounts for Upcoming Term"):	No	BOX 8 ("Half-Time or Above"):	No	
Box 9 ("Graduate Student"):	No	Box 10 ("Ins. Contract Reimb./Refund"):	\$0.00	



13.3 View/Print 1098-T Statement

Students can view and print tax statements by clicking on **View/Print Statement** link under their 1098-T Statement header.

			Vie	w/Print	Statement			
Step 1:	Click	View/Print Stat	ement link u	under the	e 1098-T stater	ment heade	r.	
	Note appe	e: Students must ear.	You must t	urn off your	View/Prir r pop-up blocker to vi	nt Statement » ew and print the tax form.	er for	the tax form to
Step 2:	The brow	tax form appears ser.	. Students n	nust prin	it the tax form f	rom the me	nu ba	ar on their web
		FILER'S name, street address, city or to foreign postal code, and telephone num ECSI Demo University 100 Global View Dr Warrendale PA 15086 Contact: 412-788-3900 ECSI: 866-428-1098	vn, state or province, country, Zi er	IP or	1 Payment: received for qualified tunion and related expenses \$1,000.00 2	OMB No. 1545-1574 2019 Form 1098-T		Tuition Statement
		FILER'S federal identification no. 9999999999	STUDENT'S taxpayer i *****1111	dentification no.	3			Copy B For Student
		STUDENT'S name, street address, city, BILL MAZEROSKI 115 FEDERAL STREE	tate, and ZIP code		4 Adjustments made for a prior year	5 Scholarships or grants		This is important tax information and is being furnished to the Internal Beranna
		PITTSBURGH PA 151:	2		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2020	[]	Service. This form must be used to complete Form S8G3 to claim education credits. Give it to the tax preparer or use it to
		Service Provider/Acct No. (see instr.) 111111	8 Checked if at least half-time student	[]	9 Checked if a graduate student []	10 Ins. contract reimb./refur	ıd	prepare the tax return.
		Form 1098-T If you have any general quest information for ECSI. If you ! Neither your school nor ECSI	(keep for y ons, please visit http://w ave any questions regard can answer tax question	our records) ww.ecsi.net/taxi ding the financia is or provide tax	www.irs.gov/1098t info.html for information rega al information on your 1098-7 c advice, you must contact you	Department of the Tre arding your tax docume I, please contact your so ur tax professional.	asury-Inte nts and to chool direc	rnal Revenue Service obtain contact ttly.
		Tran: Trans Date Box # Tra	action History Is Description	Trans Amt	Trans Date	Transaction I Box # Trans Desc	History ription	Trans Amt



13.4 Updating the 1098-T Form

Students can request an update of their SSN, name, or address on their tax form by selecting the **Make a Change** link under their 1098-T statement header.

	U	odate 1098-T/Electronic W9-S Process
Step 1:	Click the Make a Char	nge link under the 1098-T statement header.
		Make a Change » Select this option if you would like to update your SSN, Name or Address listed on your tax form.
Step 2:	The Complete W-9S	window appears. The student needs to complete each section of the
		Complete W-9S Complete W-9S Complete A state in the first of the ray and whether the that the State at the St
		Part I. Student or Borrower Identification (This section is required) Read W-95 Form Instructions Instructions Training MFraner
		Though the fit address states xxx disk 2785
		Actives 2 Manop Dr
		Oly Pittsburgh
		Bote Peringhania 👻
		80 fore 15168
		Part II: Student Loan Certification This section is to be completed only for the purpose of receipt of Ioan proceeds. This section is not required for the purpose of requesting a change to a 1088-1 or 1088-8 form
		Part III: Requestor Information (This section is optional)
		Requestor's Name
		Requestor's Address (number, street, suite no.) Remuestor's Chiv
		Select a State
		Requestor's Zip Code.
		Tuition Account Number
		Loan Account Number
		Back Continue



This site us	Review W-9	DS DE LA CONTRACTA
	Form W-95: Request for Stude	nt's or Borrower's Taxpayer Identification Number and Certification
	If you would prefer to complete and it to display forms. You must have your	nail a paper W-95, click here to access the paper form. Please remember that this site uses pop-up windows pop-up blocker off for this site.
	Please reviev	v the information and click Submit to initiate the change. se allow up to 10 business days for the change to be effective.
	Part I: Student or Borrower Identi	fication
	Name of Student or Borrower : Taxpayer Identification	iraning McIrainer xxx-k789
	Address (number, street and and or suite no)	2 Manor Dr
	City:	Pittsburgh
	State :	Pennsylvania
	ZIP Code :	15108
	Part II: Student Loan Certification This section is to be completed only fi change to a 1098-T or 1098-E form	or the purpose of receipt of loan proceeds. This section is not required for the purpose of requesting a
	Part III: Requestor Information (T)	nis section is optional)
	Description of the	
	Requestor's Address (number.	
	street, suite no) :	
	Requestor's City :	
	Requestor's State :	
	Requestor's Zip Lode : Tuition Account Number :	
	Loan Account Number :	
	second response to the transfer of	
	Rack	
	Date	





13.5 Creating a 1098-T Dispute

Students are able to submit a dispute online with ECSI in the event they disagree with the information listed on their 1098-T document.

		Create a Dispute
Step 1:	Click the Create a Disput	e link under the 1098-T statement header. Create a Dispute » Select this option if you disagree with information shown in the boxes of your tax form.



A comment is necessary for each box	disput	ed	on the 1098-T forms. Click Continue.
Submit A	Dispu		
Please	allow up to 1	0 busir	Submit A Dispute. ness days to validate the disputed information.
C) You mi	eck the boxes t y select more t	hat you i han one	want to dispute and enter your comments below. box. You must have comments for each box disputed.
Box 1 ("Payments"	\$600.00	1	This box should be \$1500.00
Box 2 ("Charges	\$8,312.50		
Box 3 ("Reporting Metho Changed	d No		
Box 4 ("Prior Year Adjustments"	\$0.00		
Box 5 ("Scholarships & Grants"	: \$0.00		
Box 6 ("Prior Year Adj Scholarships & Grants	\$0.00		
Box 7 ("Amounts for Uppcomin Term"	g No		
Box 8 ('Haif Time or Above')	t Yes		
Box 9 ("Graduate Student"	Yes	1	Tam not a graduate student
Box 10 (* 1ns. Contra Relimbursement/Relund	t \$0.00		
Please enter a phone number. Email Address: law	nd/or email addre: Address ocs@ecsi.net	ss where w	e may contact you with additional questions or to gather more information:
Phone Number: Prome	Number (412) 788-3900		
Sack Control			
	ン		
Note: A valid email address and phone	num	ber	is necessary so that we can contact the student in t



	Review You	ur Dis	pu	lte	
	Please allo	w up to 10) busi	Submit A Dispute. hess days to validate the disputed information.	
	Check You may se	the boxes th lect more th	at you an one	want to dispute and enter your comments below. box. You must have comments for each box disputed.	
	Box 1 ("Payments"):	\$600.00	1	This box should be \$1600.00	
	Box 2 ("Charges"):	\$8,312.50			
	Box 3 ("Reporting Method Changed"):	No			
	Box 4 ("Prior Year Adjustments"):	\$0.00			
	Box 5 ("Scholarships & Grants"):	\$0.00			
	Box 6 ("Prior Year Adjs. Scholarships & Grants"):	\$0.00			
	Box 7 ("Amounts for Upcoming Term"):	No			
	Box 8 ("Half Time or Above"):	Yes			
	Box 9 ("Graduate Student"):	Yes	1	l am not a graduate student	
	Box 10 ("Ins. Contract Reimbursement/Refund"):	\$0.00			
	Please enter a phone number and/or Email Address: taxdocs@ec	email address v si.net	ihere we	may contact you with additional questions or to gather more information:	
	Phone Number: 141-27-883	900			
	Back	D			
		ν			



Step 4:	The Dispute Submitted window appears. Click I am Done if no more work is required, or click Back to
	Tax Document Information if you wish to view more information about your tax documents.
	Chathan
	Dispute Submitted
	This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker for this site. To turn off your Pop-up blocker, visit the Tools or Settings
	menu tor your specific browser.
	Thank you. Your Dispute Has Reen Submitted
	Please allow up to 10 business days to validate the disputed information.
	Internet Back to Tay Decumpab Information