

IRS Form 1098-T Student Guide

Eligible colleges must send the Tax Form 1098-T to any student who paid "qualified educational expenses" by January 31st in the preceding tax year. Qualified educational expenses include tuition, any fees that are required for enrollment, and course materials the student was required to buy from the school.

Who is required to have a 1098-T form?

- Any student enrolled in any classes during the calendar year for which the student was charged tuition for courses which offered academic credit
- Any student enrolled in the prior calendar year who has had an adjustment or transaction made during the current calendar year

Understanding my 1098-T form:

Institutions may report either payments received during the calendar year in box 1 or amounts billed during the calendar year in box 2. The amount shown in box 1 or 2 may represent an amount other than the amount actually paid in the tax year.

STUDENT'S SOCIAL SECURITY NUMBER - For your protection, this form may show only the last four digits of your social security number (SSN). If your SSN is incorrect on this form, you did not provide it to your institution.

BOX 1 - Shows the total payments received in the tax year from any source for qualified tuition and related expenses less any reimbursements or refunds made during the tax year that relate to those payments received during the tax year.

BOX 2 - Shows the total amounts billed in the tax year for qualified tuition and related expenses less any reductions in charges made during the tax year that relate to those amounts billed during the tax year.

BOX 3 - Shows whether your institution changed its method of reporting for the tax year. It has changed its method of reporting if the method (payments received or amounts billed) used for the tax year is different than the reporting method used for the prior tax year. You should be aware of this change in figuring your education credits. The credits are allowable only for amounts actually paid during the year and not amounts reported as billed, but not paid, during the year.

BOX 4 - Shows any adjustment made for a prior year for qualified tuition and related expenses that were reported on a prior year Form 1098-T. This amount may reduce any allowable education credit that you claimed for the prior year (may result in an increase in tax liability for the year of the refund). See RECAPTURE in the index to Pub. 970 to report a reduction in your education credit or tuition and fees deduction.

BOX 5 - Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of the education credit you claim for the year.

BOX 6 - Shows adjustments to scholarships or grants for a prior year. This amount may affect the amount of any allowable tuition and fees deduction or education credit that you claimed for the prior year. You may have to file an amended income tax return (Form 1040X) for the prior year.

BOX 7 - Shows whether the amount in box 1 or 2 includes amounts for an academic period beginning January-March of the next tax year. See Pub. 970 for how to report these amounts.

BOX 8 - Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution. If you are at least a half-time student for at least one academic period that begins during the year, you meet one of the requirements for the American opportunity credit. You do not have to meet the workload requirement to qualify for the lifetime learning credit.

BOX 9 - Shows whether you are considered to be enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level educational credential.

BOX 10 - Shows the total amount of reimbursements or refunds of qualified tuition and related expenses made by an insurer. The amount of reimbursements or refunds for the calendar year may reduce the amount of any education credit you can claim for the year (may result in an increase in tax liability for the year of the refund).

[Online Access to 1098-T Forms](#)

Access your form from our vendor's website. You will be required to register an account and enter your school and other personal information: <https://heartland.ecsi.net/>

After you have created a profile, signed in to your profile, and connected your tax form account, you can view your 1098-T tax information.

From the Your School Accounts page, click on the tile/card that is displayed for the school.

Then, click on the View Account button. Your tax form information will be displayed on the page.

[View Or Print Your 1098-T Tax Form](#)

IMPORTANT: You must turn off pop-up blockers to view your form in the IRS Form 1098-T format. To turn off your pop-up blockers, visit the Tools or Settings menu for your specific browser.

Click on the View/Print Statement link to the right of the tax form information section.

Your form will be presented in the IRS Form 1098-T format in your browser's standard print dialogue box. Follow the print instructions for your particular browser to print the form to your local printer.

STILL NEED HELP? Contact ECSI SUPPORT Center at (866) 428-1098 for further assistance. The school cannot provide assistance in creating an account and pulling your 1098-T Form online. You must contact our vendors customer service line as indicated above.

[Who is Heartland ECSI?](#)

ATS Institute of Technology has partnered with Heartland ECSI to distribute our 1098-T Tax Statements electronically. Online access to the 1098-T Tax Statement eliminates the risk of the statement getting lost, misdirected, or even delayed during delivery. Students who wish to receive their Tax Statement electronically will need to create an account with Heartland ECSI via the following web address: <https://heartland.ecsi.net/index.main.html#/access/eConsent>.

[Resources](#)

The Tax Relief Act of 1997 may provide you with an opportunity for tax savings through the Hope Scholarship Credit (American Opportunity Tax Credit) and the Lifetime Learning Tax Credit. These two tax credits are based on payments made for tuition and certain related educational costs. If you have questions about how to compute your education tax credit, you should consult your tax professional or refer to the IRS. The college is not able to provide tax advice, but the following are links to further information on 1098-T forms and tax credits:

- IRS website at www.irs.gov
- IRS Telephone Assistance Hotline: (800) 829-1040

Information you may find that needs to be corrected on your form (I.E. student name, address or other personal information) can be discussed with the schools Office of the Bursar.

What if the SSN on my tax form is incorrect?

To correct your Social Security Number ("SSN") on your tax form, you must fill out Form W-9S. [Click here to download Form W-9S](#). Please include your School Code and School name on the top of the form to help expedite your request. Please note that your SSN cannot be corrected without a W-9S form on file. After completing the form, you can submit it to ECSI using the following methods:

- Fax the form to: 1.844.365.8101.
- Mail the form to: P.O. Box 1278, Wexford, PA 15090.