

# Colgate University Office of Student Accounts

## Instructions to Access 1098-T Tax Form

As required by the Internal Revenue Service (IRS), Form 1098-T is prepared annually with our partner Heartland ECSI for all students with qualified tuition and other related educational expenses for the calendar year considered. The form is made available by January 31 each year for the prior calendar year and sent electronically (if consented to) or by hard copy to a student's permanent address.

To access the 1098-T form:

Go to <https://heartland.ecsi.net/index.main.html#/access/FAQtaxDocuments>

There are three steps to access your 1098-T tax form.

### **Step 1: Create a Profile**

You will need to create a profile to connect an account and access your 1098-T tax form. See **Create a Profile** below for step-by-step instructions.

If you already have a profile, you can skip Step 1 and go directly to Step 2 to connect your tax form account to your existing profile.

### **Step 2: Sign-In to Your Profile**

Now that you have created your profile, you will need to sign in to the profile to complete step 3 of this process. See **Sign-In to Your Profile** for step-by-step instructions.

### **Step 3: Connect an Account**

Once you have created a profile, you will need to connect your tax form account to your profile. See **Connect an Account** for step-by-step instructions.

**IMPORTANT!** You will need your Heartland Key to connect your account.

If you signed up to receive your tax form electronically (completed the electronic consent application) prior to receiving your tax form, your Heartland Key will be located in the email communication you received from ECSI on behalf of your Colgate University. If you cannot locate this email, you will need to call the ECSI Contact Center at (866) 428-1098 to get your Heartland Key over the phone or have the email resent to you.

If you received a printed tax form that was mailed to your address, you will need to call the ECSI Contact Center at (866) 428-1098. Once you have verified your identity, ECSI can either provide your Heartland Key over the phone or they can send an email with your Heartland Key to you.

To access the 1098-T form:

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Colgate University, Office of Student Accounts, James B. Colgate Hall  
13 Oak Drive, Hamilton, NY 13346  
Phone: 315-228-4817 • Fax: 315-228-7989 • E-mail: [stuaccounts@colgate.edu](mailto:stuaccounts@colgate.edu)

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### Create a Profile

To create a profile, click on the Sign In | Register link in the top right of the web page. Go to the Register and Create A New Profile area on the right side of the page. Follow the instructions below.

**Step 1:** Think of the username you want to use and enter it in the Username field. Then think of a password you want to use and enter it in the Password field. You will need to re-enter the password in the Confirm Password field. Click on the Continue button.

**Step 2:** Enter your contact information including your first and last name, date of birth, phone number, and email address. Click on the Continue button.

**Step 3:** Enter your address including street, city, state and zip code. Click on the Continue button.

**Step 4:** Select three (3) security questions and enter your security answers. Check the reCAPTCHA checkbox and click on the Save Your Profile button.

When your profile is successfully created, you will be returned to the Sign In page.

### Sign-In to Your Profile

To sign in to your profile, click on the Sign In | Register link in the top right of the web page. Go to the Sign In To An Existing Profile area on the left side of the page. Follow the instructions below.

**Step 1:** Enter your username and password. Click on the Continue button.

**Step 2:** Choose how you want to receive your verification code. Check the reCAPTCHA checkbox and click on the Send Verification Code button.

*NOTE: You can receive the code via text if you entered a mobile number for your profile. Otherwise, you can receive your verification code via automated call or email.*

**Step 3:** Enter the verification code that you received in the Verification Code field. Click on the Continue button.

When you have successfully completed the Sign In process, you will be directed to the Your School Accounts page. This is where you will need to connect your tax form account to your profile to view or print your 1098-T(s).

### Connect an Account

To connect an account to your profile, use the following steps.

*IMPORTANT! You will need your Heartland Key to connect your account.*

**Step 1:** Click on the Connect An Account tile from the Your School Accounts page.

**Step 2:** On the right side of the page, enter your Heartland Key and click the Continue button.

If ECSI's information matches the information in your profile, your tax form account will be connected to your profile. If ECSI's information only partially matches your information in your profile, you will be prompted to enter additional points of verification. If ECSI's information does not match the information in your profile, you will be directed to call the ECSI Contact Center at (866) 428-1098.

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### **View or Print Your 1098-T Tax Form**

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

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.

*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.

If you have any questions or concerns, please contact the Colgate Office of Student Accounts at [stuaccounts@colgate.edu](mailto:stuaccounts@colgate.edu) or 315-228-4817.

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