

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 mid-February 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:

1. Go to <https://heartland.ecsi.net>
2. No registration or sign-in is required.
3. Scroll down and select "Access Your 1098-T Tax Documents".
4. Scroll down and select "Want to look up your 1098-T or 1098-E tax form? Click here to start your search".
5. Select "I need my 1098-T Tuition tax statement"
6. In the 'School Name' field, find and select "Colgate University". Click 'Submit'.
7. Enter:
 - a. Student First Name
 - b. Student Last Name
 - c. Student SSN
 - d. Zip Code for student's permanent home address on file with Colgate.

(Please note the information entered must exactly match the information Colgate has on file for the student.)

Check "I'm not a robot", then "Continue".

8. The 'Your Tax Statement' window appears indicating 1098-T Statement, Status: Delivered.
 - a. Click "View Details >>"
9. Current and past 1098-T details will appear.
10. View and print tax statements by clicking on 'View/Print Statement' for the desired year.
 - a. Note: the pop up blocker must be turned off on the web browser for the tax form to appear.

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

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