

# 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.

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

The 1098-T Tax form can be accessed in the [TouchNet](#) portal. Students and authorized users who have been given 1098-T access by their student will be able to view or print the 1098-T tax forms. Once logged into [TouchNet](#), make the following selections: My Account, Statements, 1098-T Tax Statements tab, then select View next to the year you'd like to view.

### **Establish or Update Authorized User Access**

Establish New Authorized User(s):

Students can designate a parent, guardian or other as an Authorized User. As such, they can: Receive e-statement notifications, view the student account information, view the 1098-T statement, and make payments on behalf of the student, based on the access granted.

1. Sign in to TouchNet. Under "My Profile" select "Authorized Users."
2. Provide the email address for the authorized user(s) and choose their level of access.
3. Authorized Users will receive an email notification confirming their authorization and instructions on next steps.

Update Authorized User:

Once an authorized user has been established, a student can update what the user is authorized to access at any time.

1. Sign in to TouchNet. Under "My Profile" select "Authorized Users."
2. Select the Action toggle next to the authorized user for which access is being updated.
3. Select "Yes" for any category the authorized user should have access to.

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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