

ACCESSING YOUR FORM 1098-T ONLINE

1. Visit our website at <https://sfs.fullerton.edu/services/1098t/>

2017 IRS Form 1098-T

The 2017 calendar year Form 1098-T data will be made available on January 31, 2018.

IMPORTANT NOTE

California State University, Fullerton has outsourced the production and customer service call center for 2017 IRS Forms 1098-T to Heartland ECSI® (Educational Computer Systems, Inc.). The Heartland ECSI Corporation is a private company completely independent from the college and universities that contract with it to provide Federal Tax Reporting.

For **tax specific questions**, please contact the Internal Revenue Service (IRS) at 1-800-829-1040 or your personal tax advisor for further assistance.

If you need assistance accessing your Form 1098-T, please contact Heartland ECSI at 1-800-437-6931.

Important Notes About Heartland ECSI Accounts	Heartland ECSI & 1098-T
<p>If you would like to create a profile to access your tax document, the instructions to create a profile, as well as your Heartland Key, are included in the email Heartland ECSI sends to you when your tax statement is ready. We have included those instructions below for your reference.</p> <p>In the event that you do not have the email containing your Heartland Key, please contact Heartland ECSI's Customer Service Department at 1-866-428-1098 or via LiveChat from the Heartland ECSI student website. You will need to provide basic information to authenticate your identity, and the Heartland Key will be provided.</p>	<p>Form 1098-T Look-up</p> <p>You can access your tax form without creating a profile by accessing the tax document retrieval link above.</p>

2. Click button to access Heartland ECSI website.
 - a. Please **DISABLE** all pop-up blockers before entering the site.

The screenshot shows the Heartland ECSI website interface. At the top, there is a navigation bar with 'Home', 'Products & Services', and 'Help Center'. Below this is a banner image of a building with the text 'Search For Your Tax Document'. A red banner below the banner contains a warning: '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 for your specific browser.' Below the banner, the text reads 'First, let's check to make sure your school has posted their tax documents.' There is a search form with a label 'School Name (start by typing the first several letters of your school name)'. The input field contains 'School Name' and a dropdown menu shows 'California State University Fullerton'. A red arrow points to the input field. Below the form is a red 'Submit' button.

3. Search for California State University Fullerton and click Submit

4. **Enter your Personal Information on the secured page.**
 - a. **Information entered must match CSUF records in the year you are searching.**

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)


California State University Fullerton

First Name

Last Name

SSN

Zip Code

I'm not a robot 

Continue

5. **Check your delivery status and click the "(+)" to view your Form 1098-T.**

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

1098-T STATEMENT Status: Delivered (US Mail) -

Reporting Institution:	California State University Fullerton	Tax Year:	2016	View/Print Statement » You must turn off your pop-up blocker to view and print the tax form.
Delivery Address:				Make a Change » Select this option if you would like to update your SSN, Name or Address listed on your tax form.
Box 1 ("Payments"):	\$0.00	Box 2 ("Charges"):	\$0.00	
Box 3 ("Reporting Method Changes"):	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"):	Yes	Box 8 ("Half-Time or Above"):	Yes	
Box 9 ("Graduate Student"):	No	Box 10 ("Ins. Contract Reimb./Refund"):	\$0.00	

6. **If you would like to view the official document, click on "View/Print Statement" and a new window will open (make sure your pop-up blockers are disabled).**

Questions?

Finding your Form 1098-T online:

Contact Heartland ECSI Online Customer Service.
Start Live Chat: 7:30 AM to 8:00 PM EST, Monday to Friday
 8:30 AM to 5:00 PM EST, Saturday
Phone: (866)428-1098, 7:30AM-8:00PM EST, Mon-Fri



Information about what was reported:

Contact Student Financial Services at CSUF.
Phone: (657)278-2495 **Web:** sfs.fullerton.edu/1098t

