
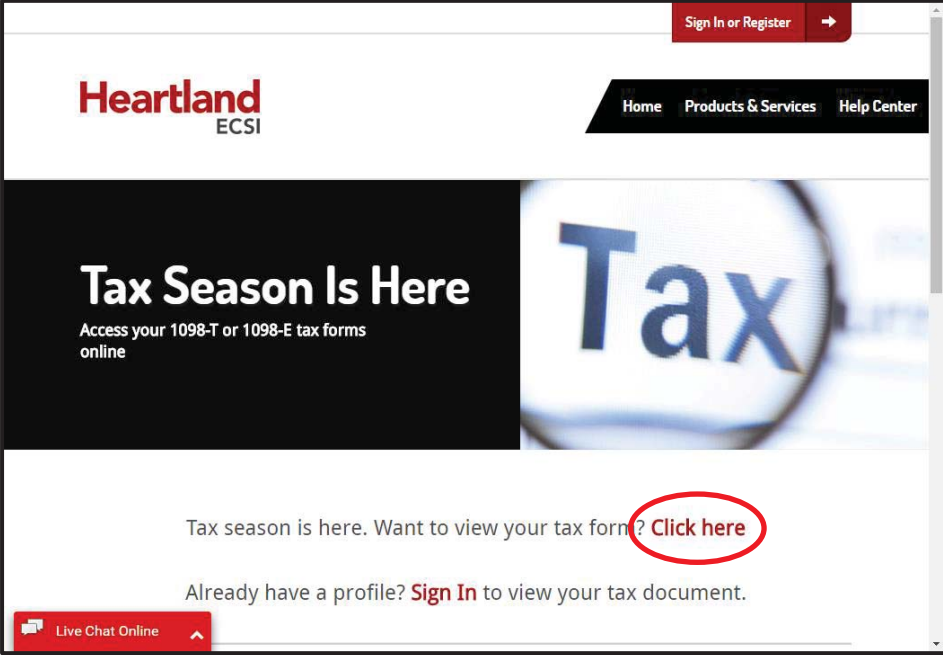


1.0 Student Website: Tax Document Search

Heartland ECSI provides students the ability to easily access and view their 1098-T forms online at <https://heartland.ecsi.net>. Through the use of our tax document search, students will need their first and last name, social security number, and zip code to access their form. The information needed to access a student's 1098-T form must match the information provided by the school to pass authentication.

1.1 Tax Document Search

Students looking to view their most recent 1098-T or 1098-E tax form can do so by using the Tax Document Search option on the Heartland ECSI Website.

| Search For Your Tax Document | |
|------------------------------|--|
| Step 1: | <p>Open your web browser and navigate to https://heartland.ecsi.net</p>  |
| Step 2: | <p>Select the option on the Heartland ECSI home page Click here after Want to view your tax form?</p>  |

Step 3:

Search for the name of the school in the field **School Name**, select the school from the list, and click **Submit**.

Heartland
ECSI

Home Products & Services Help Center

Search For Your Tax Document

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.

First, let's check to make sure your school has posted their tax documents.

School Name (start by typing the first several letters of your school name)

Heartland
Heartland University

Submit

Note: Tax forms are only available if a school has released their tax file to Heartland ECSI for processing. If a school's tax file has not been yet been released, the following message appears to the student:

We could not locate your school's tax documents. Please try again later.

School Name (start by typing the first several letters of your school name)

Edinboro University Of Pennsylvania

[We're sorry. It looks like your school has not released their tax documents to our website yet. Please try again at a later date or contact your school for the expected release date. Please keep in mind that your school has until January 31, 2017 to post the tax document.](#)

Managing your 1098-T's

Step 4:

Students must pass authentication before viewing their 1098-T form. Enter **First Name, Last Name, SSN, and Zip code** in the required fields.

The screenshot shows a web page titled "Search for Your Tax Document" with a background image of a campus building. Below the title is a red banner with white text: "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: "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." The form contains the following fields: "School Name (start by typing the first several letters of your school name)" with "Heartland University" entered; "First Name"; "Last Name"; "SSN"; and "Zip Code". At the bottom of the form is a checkbox labeled "I'm not a robot" next to a reCAPTCHA logo, and a "Continue" button.

Note: The information entered by the student must exactly match the information each school has on file for the student.

Managing your 1098-T's

Step 5:

To complete authentication, check the box for **I am not a robot** and verify the information requested by the website. Once completed, click **Verify**.



Step 6:

Click **Continue**.

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)

Heartland University


First Name
Training

Last Name
McTrainer

SSN
xxx-xx-1111

Zip code
15086

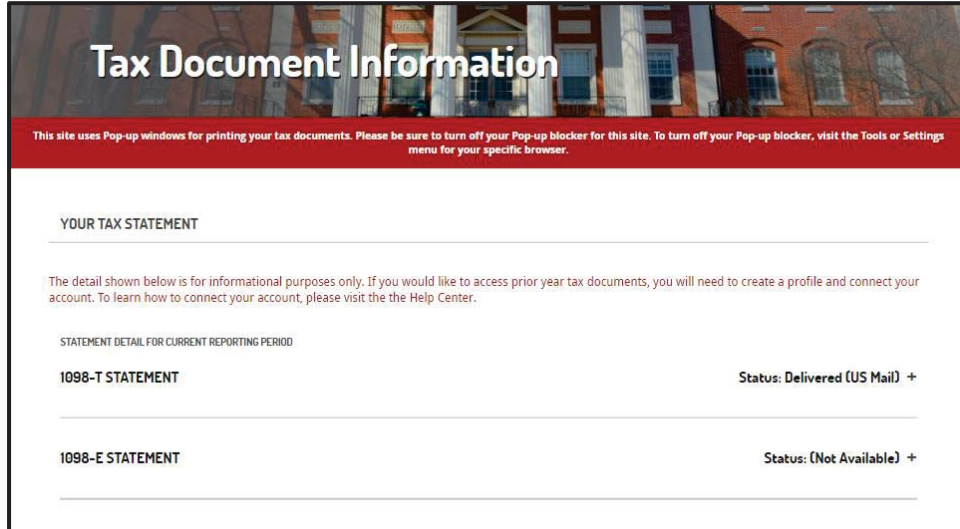
I'm not a robot

 reCAPTCHA IA
Privacy Terms

Continue

Step 7:

The **Tax Document Information** window appears listing the current year's tax forms.



Managing your 1098-T's

1.2 Viewing Your Tax Statement Information

Students view their current 1098-T and 1098-E statements, if applicable, on the Tax Document Information window. Clicking on the + sign to the right of the delivery status provides the student's tax form detail, as well as printing and administrative options.

Tax Document Information

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.

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) + |
| 1098-E STATEMENT | Status: (Not Available) + |

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 0 - |
|-------------------------|-----------------------|

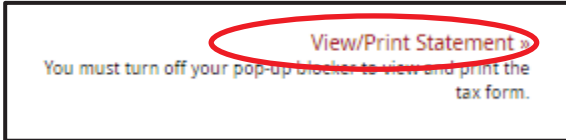
| | | |
|--|---|---|
| Reporting Institution: Heartland University | Tax Year: 2016 | View/Print Statement => You must turn off your pop-up blocker to view and print the tax form. |
| Delivery Address: 100 GLOBAL VIEW DR, WARRENDALE, PA 15086 | | |
| Box 1 ("Payments"): \$600.00 | Box 2 ("Charges"): \$8319.50 | Make a Change => Select this option if you would like to update your SSN, Name or Address listed on your tax form. |
| Box 3 ("Reporting Method Changed"): 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"): No | Box 8 ("Half-Time or Above"): Yes | |
| Box 9 ("Graduate Student"): No | Box 10 ("Ins. Contract Reimb./Refund"): \$0.00 | |

| | |
|-------------------------|-----------------------|
| 1098-E STATEMENT | Status: Delivered 0 + |
|-------------------------|-----------------------|

Managing your 1098-T's

1.3 View/Print 1098-T Statement

Students can view and print tax statements by clicking on **View/Print Statement** link under their 1098-T Statement header.

| View/Print Statement | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|---|---|--|--------------------------|-----------------------------------|--------------------------|--|--|---|---|--|---|-------------------------------------|--------------------------------------|--|--|--|--|--|---|--|--|--|--------------------------------|---------------------|--|--|--|---------------------|--|--|--|------------|-------|-------------------|-----------|------------|-------|-------------------|-----------|--|--|--|--|--|--|--|--|
| Step 1: | <p>Click View/Print Statement link under the 1098-T statement header.</p> <div style="border: 1px solid black; padding: 10px; text-align: center;">  </div> <p>Note: Students must turn off the pop-up blocker on their web browser for the tax form to appear.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Step 2: | <p>The tax form appears. Students must print the tax form from the menu bar on their web browser.</p> <div style="border: 1px solid black; padding: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="font-size: small;">FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Chatham University Office of Student Accounts Woodland Road Pittsburgh PA 15232 Contact: (800) 837-1610 ECSI: 866-428-1098</td> <td style="font-size: small;">1 Payments received for qualified tuition and related expenses</td> <td style="font-size: small;">OMB No. 1545-1574</td> <td rowspan="2" style="text-align: center; vertical-align: middle;">2015 Form 1098-T</td> <td rowspan="2" style="text-align: center; vertical-align: middle;">Tuition Statement</td> </tr> <tr> <td colspan="2" style="font-size: small;">FILER'S federal identification no. 25-0717890</td> <td style="font-size: small;">2 Amounts billed for qualified tuition and related expenses \$2,015.01</td> <td style="font-size: small;">3 If this box is checked, your educational institution has changed its reporting method for 2015 []</td> </tr> <tr> <td style="font-size: small;">STUDENT'S name, street address, city, state, and ZIP code Honus Wagner 115 Federal Street Apt 21 Pittsburgh PA 15112</td> <td style="font-size: small;">STUDENT'S social security number *****6789</td> <td style="font-size: small;">4 Adjustments made for a prior year</td> <td style="font-size: small;">5 Scholarships or grants \$200.00</td> <td colspan="2" rowspan="3" style="font-size: small; vertical-align: top;"> Copy B For Student This is important tax information and is being furnished to the Internal Revenue Service. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return. </td> </tr> <tr> <td style="font-size: small;">Service Provider/Acct No. (see instr.)</td> <td style="font-size: small;">8 Checked if at least half-time student [X]</td> <td style="font-size: small;">6 Adjustments to scholarships or grants for a prior year</td> <td style="font-size: small;">7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2016 []</td> </tr> <tr> <td></td> <td></td> <td style="font-size: small;">9 Checked if a graduate student []</td> <td style="font-size: small;">10 Ins. contract reimb. refund</td> </tr> </table> <p style="font-size: small;">Form 1098-T (keep for your records) www.irs.gov/1098t Department of the Treasury-Internal Revenue Service</p> <p style="font-size: small;">If you have any general questions, please visit http://www.ecsi.net/taxinfo.html for information regarding your tax documents and to obtain contact information for ECSI. If you have any questions regarding the financial information on your 1098-T, please contact your school directly.</p> <p style="font-size: small;"><i>Neither your school nor ECSI can answer tax questions or provide tax advice, you must contact your tax professional.</i></p> <table style="width: 100%; font-size: x-small; border-collapse: collapse;"> <thead> <tr> <th colspan="4">Transaction History</th> <th colspan="4">Transaction History</th> </tr> <tr> <th>Trans Date</th> <th>Box #</th> <th>Trans Description</th> <th>Trans Amt</th> <th>Trans Date</th> <th>Box #</th> <th>Trans Description</th> <th>Trans Amt</th> </tr> </thead> <tbody> <tr> <td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td> </tr> </tbody> </table> </div> | FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Chatham University Office of Student Accounts Woodland Road Pittsburgh PA 15232 Contact: (800) 837-1610 ECSI: 866-428-1098 | | 1 Payments received for qualified tuition and related expenses | OMB No. 1545-1574 | 2015 Form 1098-T | Tuition Statement | FILER'S federal identification no. 25-0717890 | | 2 Amounts billed for qualified tuition and related expenses \$2,015.01 | 3 If this box is checked, your educational institution has changed its reporting method for 2015 [] | STUDENT'S name, street address, city, state, and ZIP code Honus Wagner 115 Federal Street Apt 21 Pittsburgh PA 15112 | STUDENT'S social security number *****6789 | 4 Adjustments made for a prior year | 5 Scholarships or grants \$200.00 | Copy B For Student This is important tax information and is being furnished to the Internal Revenue Service. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return. | | Service Provider/Acct No. (see instr.) | 8 Checked if at least half-time student [X] | 6 Adjustments to scholarships or grants for a prior year | 7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2016 [] | | | 9 Checked if a graduate student [] | 10 Ins. contract reimb. refund | Transaction History | | | | Transaction History | | | | Trans Date | Box # | Trans Description | Trans Amt | Trans Date | Box # | Trans Description | Trans Amt | | | | | | | | |
| FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Chatham University Office of Student Accounts Woodland Road Pittsburgh PA 15232 Contact: (800) 837-1610 ECSI: 866-428-1098 | | 1 Payments received for qualified tuition and related expenses | OMB No. 1545-1574 | 2015 Form 1098-T | Tuition Statement | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Transaction History | | | | Transaction History | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Trans Date | Box # | Trans Description | Trans Amt | Trans Date | Box # | Trans Description | Trans Amt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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