

# 1098-T Tax Information

Dear Student:

In previous years, your 1098-T included a figure in Box 2 that represented the qualified tuition and fees (QTRE) we *billed* to your student account for the calendar (tax) year. Due to a change to institutional reporting requirements under federal law, beginning with tax year 2018, we will report in Box 1 the amount of eligible tuition and fees you *paid* during the 2018 calendar year up to the amount of tuition and fees billed in the calendar year 2018.

Depending on your income (or your family's income, if you are a dependent), whether you were considered full or half-time enrolled, and the amount of your qualified educational expenses for the year, you **may** be eligible for a federal education tax credit. (You can find detailed information about claiming education tax credits in [IRS Publication 970](#), page 9.)

The dollar amounts reported on your Form 1098-T may assist you in completing IRS Form 8863 – the form used for calculating the education tax credits that a taxpayer may claim as part of your tax return.

University of North Alabama is unable to provide you with individual tax advice, but should you have questions, you should seek the counsel of an informed tax preparer or adviser.

University of North Alabama is pleased to announce that we are providing the opportunity to retrieve your 1098-T forms online. IRS regulations state that each student who wishes to receive their 1098-T electronically must provide his/her consent electronically through our third party vendor, ECSI. To receive your 1098-T electronically, go to <https://www.heartland.ecsi.net>.

Below is a blank sample of the 2018 Form 1098-T, that you will receive in January 2019, for your general reference. For more information about Form 1098-T, visit <https://www.irs.gov/pub/irs-pdf/f1098t.pdf>.

<input type="checkbox"/> CORRECTED		OMB No. 1545-1574		<b>2018</b>	<b>Tuition Statement</b>
FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses			
FILER'S employer identification no.	STUDENT'S TIN	3 If this box is checked, your educational institution changed its reporting method for 2018 <input type="checkbox"/>		<b>Copy B For Student</b>  This is important tax information and is being furnished to the IRS. 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.	
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants		
Street address (including apt. no.)		\$	\$		
City or town, state or province, country, and ZIP or foreign postal code		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January—March 2019 <input type="checkbox"/>		
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student <input type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund		
		\$	\$		
Form <b>1098-T</b>		(keep for your records)		www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service	

Follow these instructions to get the form:

<https://heartland.ecsi.net/>

**\*DO NOT Sign In or Register!\***

To view your tax form, click on Tax Documents.

The screenshot shows the Heartland ECSI website interface. At the top right, there is a red button labeled "Sign In or Register" with a right-pointing arrow. Below this is a black navigation bar with the Heartland ECSI logo on the left and four links: "Home", "Download Forms", "Help Center", and "Contact Us".

The main content area features a green banner on the left with the text "New Billing Statements for Borrowers" and a link "Click here to learn more.". To the right of the banner are three small thumbnail images of document pages.

Below the banner is a section titled "Want to learn more about managing your account online? View our Help Center or select an option below". This section contains a grid of six service options, each with an icon, a title, and a brief description:


- New to Heartland ECSI?**: Are you new to Heartland ECSI? Start here to learn how to create a profile and manage your account.
- Student Loan Accounts**: Do you need to view your student loan account? No problem! Our online account access makes all of the information available at your fingertips.
- Past Due Tuition & Fees**: You have a past due account. Now what do you do? Access information on how you can bring your Tuition & Fees current.
- Refunds**: Looking for information about your refund? You can find useful information to answer all of your disbursement questions.
- Tax Documents**: Don't miss out on important information for your upcoming tax return. Check out common questions about your student loan tax documents. (This option is circled in red and has a black arrow pointing to it from the right.)
- Tuition Payment Plans**: Not sure if a tuition payment plan is right for you? View information on what plans are available and how they work.

Click the first box to search for the form.

[Sign In or Register](#) →

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# TAX DOCUMENTS




## Tax Documents


[Return to Help Center](#)

We're here to help!


We issue over 5 million tax documents each year, so we fully understand the most efficient and effective way to get you the information you need for your annual IRS tax returns. In the spirit of our mission, we want to offer simple but thorough solutions to all of your questions. So, go ahead, ask away.



**Want to look up your 1098-T or 1098-E tax form?**  
[Click here to start your search.](#)



**[Click here to Learn About Your 1098-T Tax Document.](#)**



**[Click here to Learn About Your 1098-E Tax Document.](#)**

### Commonly Asked Questions

<b>Understanding Your 1098-T</b> Let us walk you through the 1098-T Tax Form box by box.	<b>Updating Your Information</b> Request updates to your personal information 100% online.	<b>When Can I Expect My Form?</b> Want to know when you can expect your form to be issued? Review our tax document schedule.
<b>Understanding Your 1098-E</b> Learn what each section of the 1098-E Tax Form means and how to use the information.	<b>Sign Up For Electronic Forms</b> Want to know how to get your form delivered electronically? Learn how to do it in a few simple steps.	<b>Accessing Last Year's Form</b> You can access your prior year tax forms by using our tax document search or registering for a user profile.

Type in school name, select it, and click submit.

Sign In or Register →

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Home Download Forms Help Center Contact Us

## 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)

North Alabama  
University of North Alabama

Submit

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Complete the information and click continue.

Sign In or Register →

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## 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.

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.

**Fill in information**

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


University of North Alabama

First Name

Last Name

SSN

Zip Code

I'm not a robot   
HIDAPTOHA  
Πρωσι - Τηλε

Continue

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\*\*The zip code goes by your permanent address on file with UNA. If you have any problems with your criteria, you will need to confirm that you are using the correct zip code.

Click the plus symbol to see all the 1098-T forms that are available to you. You will also have the option to print the form.

The screenshot shows the Heartland ECSI website interface. At the top right, there is a red button labeled "Sign In or Register" with a right-pointing arrow. Below this is a dark navigation bar with links for "Home", "Download Forms", "Help Center", and "Contact Us". The main header features the "Heartland ECSI" logo on the left and a large banner image of a building with the text "Tax Document Information". Below the banner is a red warning bar: "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." The main content area is titled "YOUR TAX STATEMENT" and lists several items: "STATEMENT DETAIL FOR CURRENT REPORTING PERIOD", "1098-T STATEMENT" (with a plus sign and "Status: Delivered"), and "1098-E STATEMENT" (with a plus sign and "Status: Delivered"). A large black arrow points down from the plus sign next to the 1098-T statement. At the bottom left is the Heartland ECSI logo and footer text including "Terms of Use - Privacy Policy" and "© 2018 Heartland ECSI. All rights reserved." At the bottom right is a red chat button labeled "Ready to Live Chat?".

Make sure to turn off any pop up blockers so you can pull up the form to view or print it.

This image shows a detailed view of the "1098-T STATEMENT" section. The heading "YOUR TAX STATEMENT" is at the top. Below it is "STATEMENT DETAIL FOR CURRENT REPORTING PERIOD". The "1098-T STATEMENT" entry is shown with a minus sign and "Status: Delivered". Below this, the reporting institution is listed as "University of North Alabama" and the tax year as "2018". A red circle highlights the "View/Print Statement »" link, with a message below it: "You must turn off your pop-up blocker to view and print the tax form."