



1098-T Retrieval Instructions

Heartland ECSI is our service provider that manages the mailing and online access to your 1098-T from SRU. **They have established a new process as of 2/16/24 to access the form electronically, which requires a phone call or online step to connect your Heartland Key to your account to finalize account access.** Because this is a new change, wait times may be high but options are detailed below to obtain your key.

Go to: <https://heartland.ecsi.net/index.main.html#/access/signIn>

If you have not already registered for an account, create an account under “Register” on the right side of the page.

- Step 1 – Create username and password. Click continue.
- Step 2 – Enter contact information requested, click Continue.
- Step 3 – Enter address, click Continue.
- Step 4 – Create security questions and answers.
 - Click the “I’m not a robot” box.
 - Click “Save your profile.”
- The system will take a minute or so to save but a successful completion will result in a return to the home page with a green message at the top. “Congratulations! You have successfully created your user profile. Please sign in to connect and access your accounts.”
- You will also get an email confirmation from ECSI confirming the creation of your Easy Path account, note that the Heartland Key in the email is an example not your actual Heartland Key.
(See red text below if you do not already know your Heartland Key.)

If you have already registered for an online account, enter your username and password on the left side under “Sign In”.

- Enter your username and password
- Click “Continue”
- Next click a method to receive your verification code (Text, Automated Call, or Email)
- Click the “I’m not a robot” box.
- Click “Send Verification Code”
- Enter the verification code you receive.
- Click “Continue”
- Click the Blue Plus Sign to Connect an Account to your profile.
 - **To find your Heartland key account number:**
 - **Call ECSI at 1-866-428-1098.** There may be an extended wait, but the system does offer an opportunity to save your place in line, and be called automatically when it is your turn.
 - **On ECSI’s website, go to the Connect an Account page.** On the right-hand side, where it says, “FOR 1098-T TAX FORMS” click on “click here”. Enter our school’s name, your SSN, and your zip code, plus the reCAPTCHA component. Click on Find My Heartland Key.
 - **Once you have connected your account, you will not need to do these steps again.**
- Next click on your Heartland Key under “Tax Documents and Information” below your school’s name.
- Any tax forms available for your school will be displayed here.
- Select 'View/Print Statement' next to the desired form to view.
- If you are looking for prior year forms, click on the history tab.

For answers to Frequently Asked Questions related to the 1098-T, here are some useful links:

<https://heartland.ecsi.net/index.main.html#/access/FAQtaxDocuments> and <https://www.irs.gov/publications/p970>