



# 1098-T Retrieval Instructions

Heartland ECSI is our service provider that manages the mailing and online access to your 1098-T from SRU.

- **If you are a current student with access to your mySRU portal:**
  - Log in to mySRU and go to the Student Billing Information card
  - Select “View or Pay Bill”, then “Pay Bill”
  - Click View 1098-T (under the My Account page)
- **If you are not a current student and do not have mySRU portal access,** please follow these directions to access your form through Heartland’s website instead.

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.**

- 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:**
    - **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.

**Please note that Slippery Rock University cannot answer questions related to tax filing. If you have a question related to how to complete your taxes using the 1098-T information, please consult a tax preparer.**

**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>

## Understanding Your 1098-T Tax Form

Your 1098-T tax form might look confusing at first glance. We're here to help you decode the boxes and their contents.

**Box 1** shows the payments that the school received for qualified tuition and related expenses during the previous year. It also includes Scholarships and Grants received for Tuition or related expenses. You may be able to deduct some or all of this amount from the income you report on your federal tax return.

**Box 4** shows any adjustment, refunds towards reductions, or reimbursements made for any prior year for qualified tuition and related expenses that were reported on a prior year's 1098-T tax form. This amount could reduce any allowable education credit that you claimed for any prior year.

**Box 5** shows the total of all scholarships or grants processed and administered by the eligible school or university. The amount of grants or scholarships for the calendar year (including those not reported by your institution) could reduce the amount of the education credit you can claim for the year.

**Box 6** shows any adjustments to grants and scholarships for a previous year. The amount in this box may affect the amount of any allowable tuition and fees deduction or education credit that you claimed for the previous year. You may have to file an amended income tax return (Form 1040X) for the previous year.

A checkmark in **Box 7** means that Box 1 includes the amount for an academic period beginning January-March of the following year.

A checkmark in **Box 8** means that you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution for the reporting or registered year.

A checkmark in **Box 9** means that you are considered to be enrolled in a program which leads to a graduate degree, graduate-level certificate, or other recognized graduate-level educational credential.

**Box 10** shows the total amount of reimbursements or refunds of qualified tuition and related expenses made by an insurer. The amount of reimbursements or refunds for the calendar year may reduce the amount of any education credit you can claim for the year (may result in an increase in tax liability for the year of the refund.)

Source: <https://heartland.ecsi.net/index.main.html#/access/FAQtaxDocuments>

**Qualified education expenses.** For purposes of tax-free scholarships and fellowship grants, these are expenses for:

- Tuition and fees required to enroll at or attend an eligible educational institution; and
- Course-related expenses, such as fees, books, supplies, and equipment that are required for the courses at the eligible educational institution. These items must be required of all students in your course of instruction.

**Expenses that don't qualify.** Qualified education expenses don't include the cost of:

- Room and board,
- Travel,
- Research,
- Clerical help, or
- Equipment and other expenses that aren't required for enrollment in or attendance at an eligible educational institution.

Source: [https://www.irs.gov/publications/p970#en\\_US\\_2023\\_publink1000177994](https://www.irs.gov/publications/p970#en_US_2023_publink1000177994)