

How to View and Print 1098-T's via eServices

Overview

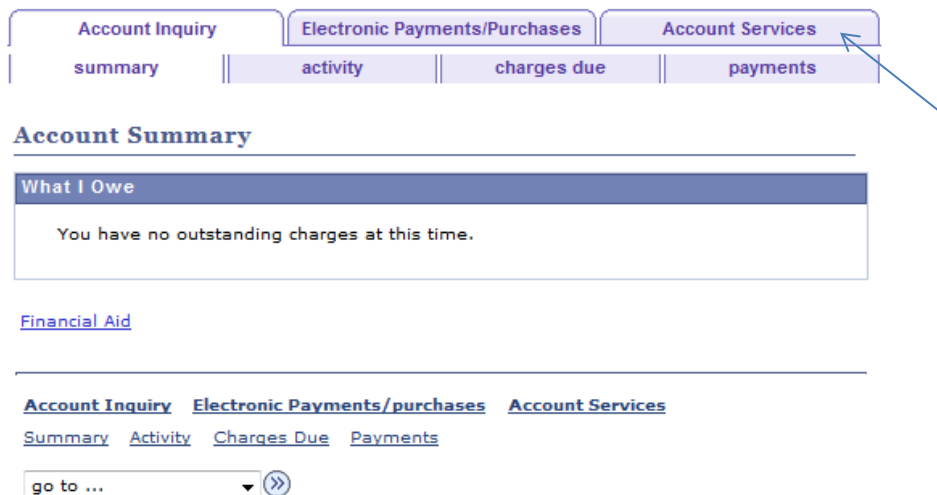
Understanding the on line 1098-T process so students can view and print the form via eServices. The student must grant consent to view and print their 1098-T on line. In granting consent the student agrees to view and print their 1098-T on-line in lieu of receiving a copy via the US Mail. To view and print their 1098-T for Tax Year 2013 and prior they **do not** need to consent, they need to click on the hyperlink for prior year's information.

Logging on to eServices to view and print their 1098-T

1. Once the student logs on to eServices they need to navigate to Account Inquiry



2. They need to click on the Account Services Tab



3. The first time the student logs on and wants to view/print their 1098-T they will get this message. They need to click on the Grant Consent button

Account Inquiry Electronic Payments/Purchases Account Services

View 1098-T

1098-T Report Selection

i You have not consented to receive your 1098-T via on-line access. Click the Grant Consent push button to allow on-line receipt.

GRANT CONSENT

[Tax Year 2013 and prior 1098-T's](#)

[Account Inquiry](#) [Electronic Payments/purchases](#) [Account Services](#)

Student may click on the hyperlink at any time to view prior year 1098-T information.

4. The student will be required to agree to the terms (check the box) and hit the submit button. If they do not want to consent then we can mail their 1098-T to the address on file. **We do not email or fax 1098-T's.** The student can go on line and print it themselves, make arrangements to pick it up, or we can mail it to the address on file.

1098-T Consent 1 2

1. 1098-T Consent Agreement

I agree to receive my 1098-T Tax form electronically through on-line access. Clicking the 'Yes, I have read the agreement' checkbox means you will no longer receive the 1098-T form via US mail. Click the Submit push button to always access your 1098-T on-line. Click the Cancel push button to return to the 1098-T Year selection.

The agreement is dated: 01/06/2015 ☒ Yes, I have read the agreement

CANCEL SUBMIT

5. They will get a confirmation page. They can now click on the View 1098-T Selection button.

1098-T Consent 1 2

2. 1098-T Consent Confirmation

✓ You have elected to receive your 1098-T electronically instead of through the US mail. Click the View 1098-T Selection button to continue viewing your 1098-T.

VIEW 1098-T SELECTION

6. To view and print the 1098-T the student needs to click on the Tax Year hyperlink.

Account Inquiry
Electronic Payments/Purchases
Account Services

View 1098-T

1098-T Report Selection

Years listed indicate which 1098-T statements are available for you to access. Click the Tax Year hyperlink to view the 1098-T Tuition Statement. To view the details, click the Box Amount Tab. View the details by clicking on the hyperlink on the Amount field.

Note:

1. If you use a pop up blocker, you will have to disable it to display your 1098-T.
2. If there is no hyperlink for the amounts, detail information is not available. Please contact your Bursar's office should you need more information.

View 1098-T

General

Box Amount

Tax Year	Version	Federal Tax ID	Institution	Printed Date	Transmittal Date
2014	Original	956002227	Palomar Community College		

Tax Year 2013 and prior 1098-T's

Account Inquiry
Electronic Payments/purchases
Account Services

7. A PDF version of their 1098-T will display. The student can now print the form and instructions.
- * If you they are using Mozilla Firefox the check mark (✓) in Box 8 is displayed as the #4. It displays correctly using Chrome or Internet Explorer.

☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Palomar Community College 1140 West Mission Road Cashier's Office A-2 San Marcos CA 92069 Cashier's Office 760/891-7514		1 Payments received for qualified tuition and related expenses \$ 920.00 2 Amounts billed for qualified tuition and related expenses \$	OMB No. 1545-1574 <div style="font-size: 2em; font-weight: bold;">2014</div> Form 1098-T	Tuition Statement Copy B For Student This is important tax information and is being furnished to the Internal Revenue Service.
FILER'S federal identification no. 956002227	STUDENT'S social security number <div style="background-color: black; color: black;">XXXXXXXXXX</div>	3 If this box is checked, your educational institution has changed its reporting method for 2014 <input type="checkbox"/>	4 Adjustments made for a prior year \$	
STUDENT'S name <div style="background-color: black; color: black;">XXXXXXXXXX</div>		5 Scholarships or grants \$ 184.00	6 Adjustments to scholarships or grants for a prior year \$	
Street address (including apt. no.) <div style="background-color: black; color: black;">XXXXXXXXXX</div>		7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2015 <input checked="" type="checkbox"/>	8 Check if at least half-time student <input checked="" type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Vista CA 92083 USA		9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$	

Form 1098-T (keep for your records)
www.irs.gov/form1098t
Department of the Treasury - Internal Revenue Service

8. The student can also view the box amount details by clicking on the Box Amount tab and clicking on the hyperlink(s) displayed.

Account Inquiry
Electronic Payments/Purchases
Account Services

View 1098-T

1098-T Report Selection

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View 1098-T

General

Box Amount

Tax Year	Version	Payments Received	Amount Billed	Prior Year Adjustments	Scholarships or Grants	Prior Year Grant Adjustments
2014	Original	666.00	0.00	0.00	0.00	0.00

[Tax Year 2013 and prior 1098-T's](#)

Account Inquiry
Electronic Payments/purchases
Account Services

9. The 1098-T Box Amount drilldown will display the break down on how Box 1 and Box 5 were calculated. For Box 1 it itemizes the amount(s) paid, the term, what eligible fees were paid, and the date(s) paid. For Box 5 it itemizes the amount of FA that was applied to the student account, the term, the type of FA and the dates applied and posted to the student account.

1098-T Box Amount drilldown

View 1098-T - 2014 - Payments Received

View 1098-T - 2014 - Payments Received							
Item	Amount	Description	Account Type	Term	Actual Billing Date	Date Posted	Payment Date
1	276.00	Student Payments - eServices	Student Enrollment Fee	2014 Fall			11/03/2014
2	45.00	Student Payments - eServices	Course Fees	2014 Fall			07/01/2014
3	69.00	Student Payments - eServices	Student Enrollment Fee	2014 Fall			09/25/2014
4	276.00	Student Payments - eServices	Student Enrollment Fee	2014 Fall			07/01/2014

[Return to View 1098-T](#)

Determine why a student cannot view their 1098-T on-line

1. There will be students who call or come in because this message is displayed to them in eServices. You need to refer to page 4 of the Procedures for Viewing and Printing 1098-T's to determine why there is no 1098-T data available for the student.

Account Inquiry	Electronic Payments/Purchases	Account Services
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View 1098-T

1098-T Report Selection

 **You do not have any 1098-T Data available.**

[Tax Year 2013 and prior 1098-T's](#)

[Account Inquiry](#) [Electronic Payments/purchases](#) [Account Services](#)

2. **If a 1098-T was generated for a student but failed validation, the 1098-T will not be available in eServices for the student to view and print.** You need to refer to page 5 of the Procedures for Viewing and Printing 1098-T's. After corrections are made we can generate and validate a 1098-T for the student.