

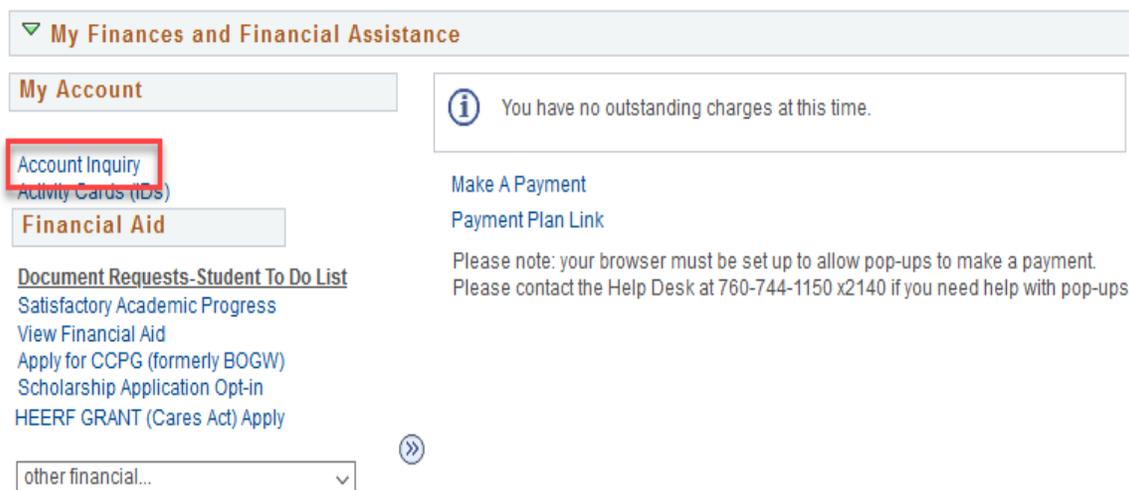
How to View and Print 1098-T's via MyPalomar

Overview

Understanding the online 1098-T process so students can view and print the form via their MyPalomar account. The student must grant consent to view and print their 1098-T online. In granting consent, the student agrees to view and print their 1098-T online 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.

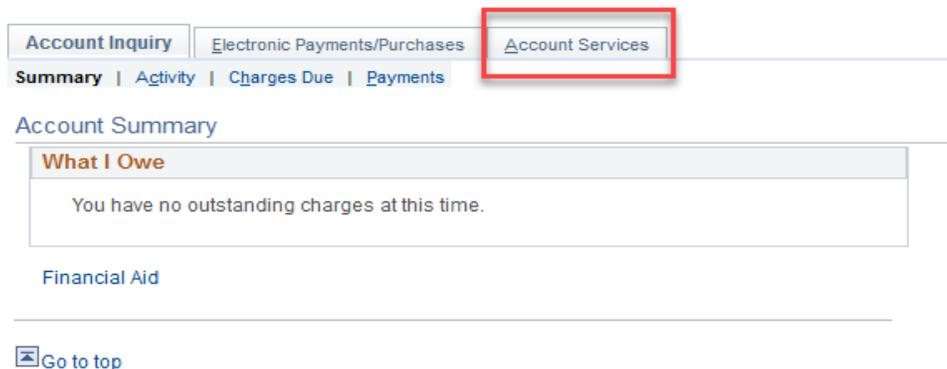
Log into MyPalomar to view and print 1098-T

1. Once the student logs on to their MyPalomar Account and selects Student Center, they need to navigate to Account Inquiry



The screenshot shows the 'My Finances and Financial Assistance' section of the MyPalomar account. The 'Account Inquiry' link is highlighted with a red box. Other visible links include 'Financial Aid', 'Document Requests- Student To Do List', 'Satisfactory Academic Progress', 'View Financial Aid', 'Apply for CCPG (formerly BOGW)', 'Scholarship Application Opt-in', and 'HEERF GRANT (Cares Act) Apply'. A dropdown menu is open showing 'other financial...'. To the right, there is a message: 'You have no outstanding charges at this time.' and links for 'Make A Payment' and 'Payment Plan Link'. A note below these links states: 'Please note: your browser must be set up to allow pop-ups to make a payment. Please contact the Help Desk at 760-744-1150 x2140 if you need help with pop-ups.'

2. They need to click on the Account Services Tab



The screenshot shows the navigation tabs at the top of the account page. The 'Account Services' tab is highlighted with a red box. Other tabs include 'Account Inquiry', 'Electronic Payments/Purchases', and 'Account Services'. Below the tabs, there are links for 'Summary', 'Activity', 'Charges Due', and 'Payments'. The 'Account Summary' section is visible, showing a 'What I Owe' box with the message: 'You have no outstanding charges at this time.' Below this, there is a link for 'Financial Aid'. At the bottom left, there is a 'Go to top' link.

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

1098-T Report Selection

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

Grant Consent

Students can click on the link below to view 1098-Ts from 2013 and prior



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

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 online and print it themselves or we can mail it to the address on file by request.

1098-T Consent



1. 1098-T Consent Agreement

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

The agreement is dated

01/29/2021

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



2. 1098-T Consent Confirmation



You have elected to receive your 1098-T electronically instead of through the US mail. Select 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.

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 Cashier's office should you need more information.

1098-T Report Selection

1098-T Report Selection				
General		Box Amount		
Tax Year	Version	Federal Tax ID	Description	Transmittal Date
2020	Original	956002227	Palomar Community College	

7. A PDF version of their 1098-T will display. The student can now print the form and instructions.

 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 Rd San Marcos CA 92069 Cashier's Office A-2 760/744-1150		1 Payments received for qualified tuition and related expenses \$ 1541.00 2	OMB No. 1545-1574 2020 Form 1098-T	Tuition Statement Copy B For Student 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.
FILER'S employer identification no. 956002227	STUDENT'S TIN	3	5 Scholarships or grants \$ 621.00	
STUDENT'S name		4 Adjustments made for a prior year \$	7 Checked if the amount in box 1 includes amounts for an academic period beginning January--March 2021 <input checked="" type="checkbox"/>	
Street address (including apt. no.)		6 Adjustments to scholarships or grants for a prior year \$	10 Ins. contract reimb./refund \$	
City or town, state or province, country, and ZIP or foreign postal code Fallbrook CA 92028 USA		9 Checked if a graduate student <input type="checkbox"/>		
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student <input checked="" type="checkbox"/>			
Form 1098-T (keep for your records)		www.irs.gov/Form1098T	Department of the Treasury - Internal Revenue Service	

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

[View 1098-T](#)

1098-T Report Selection

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1098-T Report Selection

General		Box Amount				
Tax Year	Version	Payments Received	Amount Billed	Prior Year Adjustments	Scholarships or Grants	Prior Year Grant Adjustments
2020	Original	1541.00	0.00	0.00	621.00	0.00

- 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 - 2020 - Payments Received](#)

View 1098-T - 2020 - Payments Received

Item	Amount	Description	Account Type	Term	Actual Billing Date	Date Posted	Payment Date
1	138.00	Promise Enrollment Fee Payment	Student Enrollment Fee	2020 Spring			03/06/2020
2	414.00	Promise Enrollment Fee Payment	Student Enrollment Fee	2020 Spring			03/06/2020
3	414.00	On-Line Credit Card Payment	Student Enrollment Fee	2020 Fall			06/21/2020
4	1.00	Payment Tuition and Fees	Student Enrollment Fee	2019 Summer			05/28/2019
5	68.00	On-Line Credit Card Payment	Student Enrollment Fee	2020 Fall			08/23/2020
6	138.00	On-Line Credit Card Payment	Student Enrollment Fee	2021 Spring			11/11/2020
7	368.00	On-Line Credit Card Payment	Student Enrollment Fee	2021 Spring			11/11/2020

[Return to View 1098-T](#)