

# 1098-T Tax Statements

## How to sign-up to receive the 1098-T tax statement electronically

- Go to <https://heartland.ecsi.net>
- Register and create a new profile to receive email notifications when statement is ready for viewing each year.
- A Heartland key and link to connect to your account profile will be emailed.
- Enter the Heartland key to connect to an account.
- Select History to locate all 1098-T forms.

## How to access the 1098-T online without creating an account.

- Visit <https://heartland.ecsi.net>
- Scroll down and click on "Tax Documents"
- Press "Click Here to Search for your Tax Form"
- Type in California Baptist University and click on the name when highlighted
- Click on Submit
- Enter personal information
- Click on the box next to "I'm not a robot" then press Continue
- Once logged in, you can access the most recent tax documents by clicking on the "+" button next to the statement
- The statement summary will be displayed
- Press "View/Print Statement"

## Effective for the 2018 tax year California Baptist University reports the following 1098-T information according to federal guidelines

Box 1 Payments received for qualified tuition and related expenses

Box 3 Checkbox for Change of Reporting (Checked for 2018 as it is the first year in which Box 1 is used.)

Box 4 Payment Adjustments for a Prior Year (Will be blank for 2018, as payments were not previously reported.)

Box 5 Scholarship/Grant amount credited for the current year and the previous year.

Box 6 Scholarship/Grant amount debited due to the reversal of aid for the previous year.

Box 8 Check if enrolled at least half time.

Box 9 Check if enrolled as a Graduate student.

## For 2017 and prior tax years California Baptist University reported the following 1098-T information according to federal guidelines

Box 2 Amount billed in the current year for eligible tuition and fees.

Box 4 Amount credited in the current year due to a reduction in charges from the previous year.

Box 5 Scholarship/Grant amount credited for the current year and the previous year.

Box 6 Scholarship/Grant amount debited due to the reversal of aid for the previous year.

Box 8 Check if enrolled at least half time.

Box 9 Check if enrolled as a Graduate student.

**The current year begins in January and ends in December.** Spring tuition is billed in January, Summer tuition is billed in May, and Fall tuition is billed in August.

California Baptist University has partnered with Heartland ECSI to provide 1098-T tax statements. All 1098-T's are mailed to the permanent address on record at the time of processing. If you did not receive your 1098-T or need another copy, please contact the Student Accounts Office at 951-343-4371.

**For tax information and resources regarding 1098-T's go to [www.ecsi.net/1098T](http://www.ecsi.net/1098T)**

Students who have not provided CBU with their Social Security Number will be asked to complete the substitute form [W-9s](#).

## What if the Social Security Number on my tax form is incorrect?

To correct your Social Security Number (SSN) on your tax form, you must provide a copy of your Social Security Card to the Office of the University Registrar.