

1098T Tax Form Instructions

Introduction

Taxpayers may access their 1098-T tax statements on the EasyPath borrower website after successfully creating and signing in to their account (profile).

There are three steps for the taxpayer to access their 1098-T tax form.

Step 1: Create a Profile

The taxpayer will need to create a profile.

If they already have a profile, they can skip Step 1 and go directly to Step 2 to sign in.

Step 2: Sign In To A Profile

The taxpayer must sign in to the profile to complete step 3 of this process.

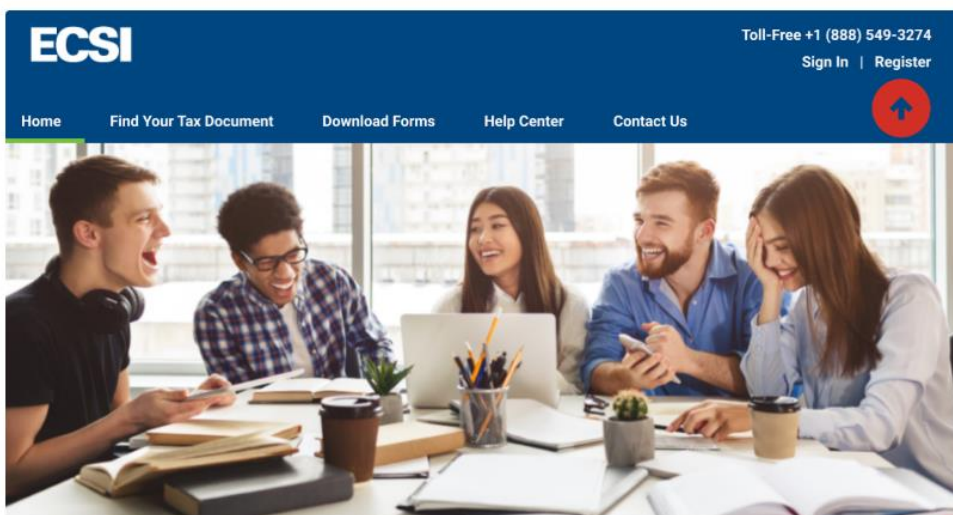
Step 3: Connect an Account

Once the taxpayer has created a profile and signed in, they must connect their tax form account to their profile.

Create A Profile

The taxpayer must create a profile to access their 1098-T tax statement. They can go directly to Sign In to Your Profile if they already have a user profile.

Step 1: Click on the **Register** link on the right side of the page.



Step 2: On the right side of the Sign In or Register page, the taxpayer can create a new profile under the **Register and Create a New Profile** section. The taxpayer will need to create a username and password.

Sign in or Register

Sign in or create a profile to view all of your ECSI accounts together online



Sign In
TO AN EXISTING PROFILE

Username

[Forgot Username?](#)

Password

[Forgot Password?](#)

Register
AND CREATE A NEW PROFILE

Username

Password


Confirm Password

- The username must be between 6 and 50 characters in length.
- The username does not require uppercase letters.
- The username cannot contain a blank space or special characters.
- If the username already exists, the system will prompt the taxpayer to select a new username or sign in with the username they entered.
- The password must be at least 8 characters long
- The password must contain 1 uppercase letter
- The password must contain 1 digit or 1 special character


Step 3: Enter first name, last name, date of birth, phone number, select the phone number type, email address, and confirm the email address.

Register

Fill in the form to create your profile to view all your ECSI accounts together.





Profile Contact Address Security



First Name
Tricia

Last Name
Watson

Date of Birth
04/01/1986 

Phone
 +1 727-555-1212

Phone Number Type
Mobile ▼

Email Address
triciawatson123@gmail.com

Confirm Email Address
triciawatson123@gmail.com

[Back](#) [Continue](#)

For the taxpayer to locate their Heartland Key using the search feature when connecting their account, the first name and last name in the user profile must match what is on record with the taxpayer's school.

If the taxpayer enters an email address that already exists, they will need to enter another email address or the system will provide a link to retrieve the username that is associated with the email address.

Step 4: Enter full address.

Register

Fill in the form to create your profile to view all your ECSI accounts together.

Progress: Profile (1) ✓, Contact (2) ✓, Address (3) 3, Security (4) 4

Country: United States

Street Address: 123 Main Street

Street Address 2: Unit 106

City: Jacksonville

State: Florida

Zip Code: 92111

Buttons: Back, Continue

Step 5: Select three security questions and answers. They will also need to click on the reCAPTCHA component.

Register

Fill in the form to create your profile to view all your ECSI accounts together.

IMPORTANT: Security answers will be required if you need to reset your password at any time in the future. Be sure to remember your answers for future use.

Progress: Profile (1) ✓, Contact (2) ✓, Address (3) 3, Security (4) 4

Security Question 1: In what city were you born?

Security Answer 1: Pittsburgh

Security Question 2: What school did you attend in sixth grade?

Security Answer 2: Marshall

Security Question 3: What is your first pet's name?

Security Answer 3: Charlie

I'm not a robot

Buttons: Back, Save Your Profile

By signing in to your ECSI profile, you acknowledge that you have read, understand, and agree to the [Terms and Conditions](#) and [Privacy Statement](#).

Step 6: Click on the **Save Your Profile** button. They will be returned to the Sign In page.

Sign in or Register

→ Congratulations! You have successfully created your user profile. Please sign in to connect and access your accounts.

Sign in or create a profile to view all of your ECSI accounts together online

↓

Sign In
TO AN EXISTING PROFILE

Username
TricWats1234
[Forgot Username?](#)

Password
••••••••
[Forgot Password?](#)

Cancel Continue

Register
AND CREATE A NEW PROFILE

Username

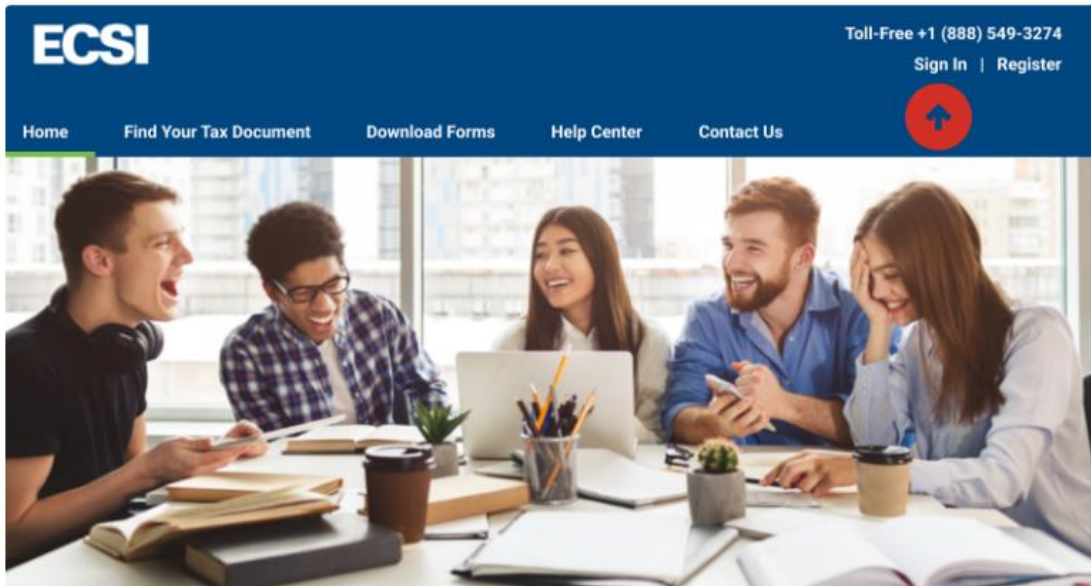
Password

Confirm Password

Cancel

Sign In to A Profile


Step 1: Click on the **Sign In** link on the right side of the page (if the taxpayer is not on the Sign In page).



Step 2: Enter the username and password. Click on the **Continue** button.

Sign in or Register

Sign in or create a profile to view all of your ECSI accounts together online



Sign In

TO AN EXISTING PROFILE

Username
TricWats1234

[Forgot Username?](#)

Password
●●●●●●●●

[Forgot Password?](#)

Register

AND CREATE A NEW PROFILE

Username


Password

Confirm Password

Step 3: Select the method for receiving the verification code. Click the **Send Verification Code** button.

Sign in

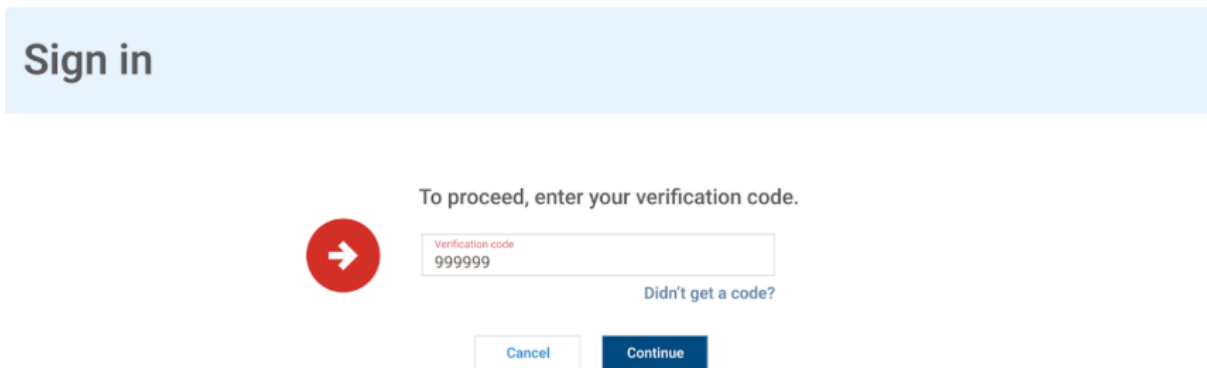
Choose how to receive your verification code.
The verification code and any communications regarding multi-factor authentication will be generated by Global Payments (GlobalPay). ECSI is a Global Payments company.

- 
- Text to ###-###-1212
Mobile phones only. Message and data rates may apply.
 - Automated Call to ###-###-0234
Mobile and home phones only. Message and data rates may apply.
 - Email to t*****4@gmail.com



- If the taxpayer has a mobile phone number in their user profile, they can receive the verification code via text, automated call, or email.
- If the taxpayer has a home or work phone number in their user profile, they can receive the verification code via automated call or email.

Step 4: Enter the verification code. Click the Continue button. The taxpayer will be directed to the Your School Accounts page.

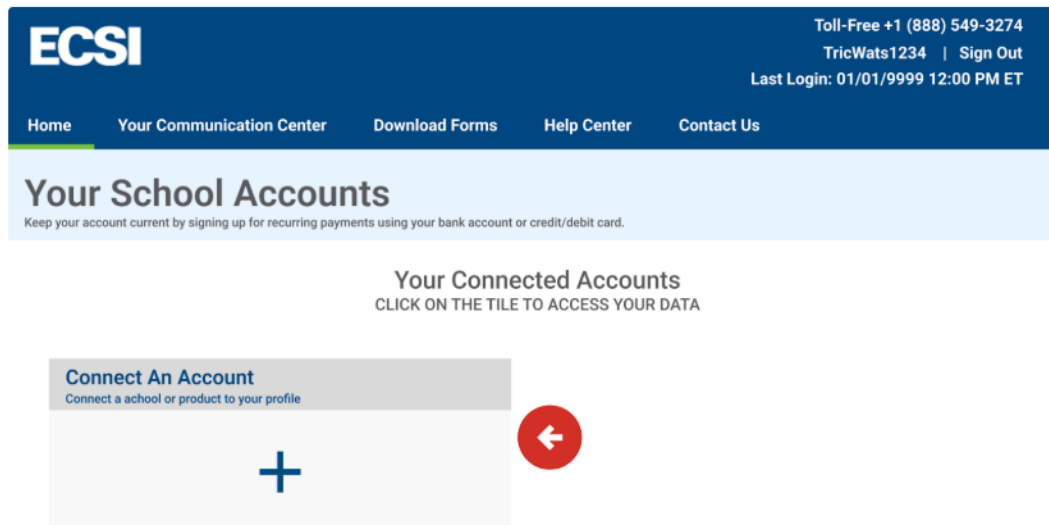


The image shows a 'Sign in' verification screen. At the top, it says 'Sign in'. Below that, a red circle with a white right-pointing arrow is on the left. To its right, the text reads 'To proceed, enter your verification code.' There is a text input field with 'Verification code' in red above it and '999999' inside. Below the field is a link that says 'Didn't get a code?'. At the bottom, there are two buttons: 'Cancel' and 'Continue'.

Connect An Account

The taxpayer must connect their account to their user profile using the Heartland Key. ***If they do not know their Heartland Key, scroll down to see Search for the Heartland Key.***

Step 1: On the Your School Accounts page, click the **Connect An Account** tile.



The image is a screenshot of the ECSI website. The top navigation bar is dark blue with the ECSI logo on the left and contact information on the right: 'Toll-Free +1 (888) 549-3274', 'TricWats1234 | Sign Out', and 'Last Login: 01/01/9999 12:00 PM ET'. Below the navigation bar is a light blue header for 'Your School Accounts' with the subtext 'Keep your account current by signing up for recurring payments using your bank account or credit/debit card.' The main content area is titled 'Your Connected Accounts' with the instruction 'CLICK ON THE TILE TO ACCESS YOUR DATA'. There is a large grey tile with a blue plus sign and the text 'Connect An Account' and 'Connect a school or product to your profile'. A red circle with a white left-pointing arrow is positioned to the right of the plus sign.

Step 2: Enter the Heartland Key. They will also need to click on the reCAPTCHA component. Click on the **Connect** button.

Connect An Account

Connect your existing Heartland accounts to your profile. If you don't know your Heartland Account, search using the fields below.

Connect An Account

ENTER YOUR HEARTLAND ACCOUNT BELOW TO CONNECT AN ACCOUNT.
YOUR HEARTLAND ACCOUNT IS LOCATED ON COMMUNICATIONS SUCH AS BILLING STATEMENTS, PAST DUE NOTICES, AND OTHER NOTIFICATIONS.
EXAMPLE: AA00XX-12345678912

Heartland Account Key
RAC25-1JC4567A912

I'm not a robot

Search for Heartland Account

HAVING TROUBLE LOCATING YOUR HEARTLAND ACCOUNT?

FOR 1098-T FORMS, [CLICK HERE >>](#)

FOR LOAN ACCOUNTS, [CLICK HERE >>](#)

FOR PAST DUE STUDENT ACCOUNTS, [CLICK HERE >>](#)

FOR REFUND DISBURSEMENT ACCOUNTS, [CLICK HERE >>](#)

If you do not want to connect an account now, skip this step and continue to your profile. You can connect accounts at any time.
[Skip this step >](#)

Step 3: Enter the requested information to complete the connection process. Click on the **Connect** button.

Connect An Account

Connect your existing Heartland accounts to your profile. If you don't know your Heartland Account, search using the fields below.

Connect An Account

ENTER YOUR HEARTLAND ACCOUNT BELOW TO CONNECT AN ACCOUNT.
YOUR HEARTLAND ACCOUNT IS LOCATED ON ECSI COMMUNICATIONS SUCH AS BILLING STATEMENTS, PAST DUE NOTICES, AND OTHER NOTIFICATIONS.
EXAMPLE: AA00XX-12345678912

Heartland Account Key
RAC25-1JC4567A912

As an additional security measure, please enter your SSN and click Connect.

I don't have an SSN

Social Security Number
***-**-6789

I want to update the account address with the address that I entered for my user profile.

Search for Heartland Account

HAVING TROUBLE LOCATING YOUR HEARTLAND ACCOUNT?

FOR 1098-T FORMS, [CLICK HERE >>](#)

FOR LOAN ACCOUNTS, [CLICK HERE >>](#)

FOR PAST DUE STUDENT ACCOUNTS, [CLICK HERE >>](#)

FOR REFUND DISBURSEMENT ACCOUNTS, [CLICK HERE >>](#)

If you do not want to connect an account now, skip this step and continue to your profile. You can connect accounts at any time.
[Skip this step >](#)

Search for the Heartland Key

Step 1: On the Connect An Account page, click on the **Click Here** link next to **For 1098-T Forms**.

ECSI Toll-Free +1 (888) 549-3274
TricWats1234 | Sign Out
Last Login: 01/01/9999 12:00 PM ET


Home Your Communication Center Download Forms Help Center Contact Us

Connect An Account

Connect your existing accounts to your profile

Connect An Account

ENTER YOUR HEARTLAND KEY BELOW TO CONNECT AN ACCOUNT. YOUR HEARTLAND KEY IS LOCATED ON ECSI COMMUNICATIONS SUCH AS BILLING STATEMENTS, PAST DUE NOTICES, AND OTHER NOTIFICATIONS. EXAMPLE: AA00XX-12345678912

 I'm not a robot 

Search for Heartland Key

HAVING TROUBLE LOCATING YOUR HEARTLAND ACCOUNT?

FOR 1098-T TAX FORMS, [CLICK HERE >>](#)

FOR LOAN ACCOUNTS, [CLICK HERE >>](#)

FOR PAST DUE STUDENT ACCOUNTS, [CLICK HERE >>](#)

FOR REFUND DISBURSEMENT ACCOUNTS, [CLICK HERE >>](#)

If you do not want to connect an account now, skip this step and continue to your profile. You can connect accounts at any time.
[Skip this step »](#)


Step 2: Fields will appear requiring the taxpayer to select their school/campus, enter their SSN or Tax ID, and enter their zip code. They will also need to click on the reCAPTCHA component.

Connect An Account

Connect your existing accounts to your profile

Connect An Account

ENTER YOUR HEARTLAND KEY BELOW TO CONNECT AN ACCOUNT. YOUR HEARTLAND KEY IS LOCATED ON ECSI COMMUNICATIONS SUCH AS BILLING STATEMENTS, PAST DUE NOTICES, AND OTHER NOTIFICATIONS. EXAMPLE: AA00XX-12345678912

 I'm not a robot 

Search for Heartland Key

HAVING TROUBLE LOCATING YOUR HEARTLAND ACCOUNT?

FOR 1098-T TAX FORMS, [CLICK HERE >>](#)

FOR LOAN ACCOUNTS, [CLICK HERE >>](#)

FOR PAST DUE STUDENT ACCOUNTS, [CLICK HERE >>](#)

FOR REFUND DISBURSEMENT ACCOUNTS, [CLICK HERE >>](#)

 I'm not a robot  

If you do not want to connect an account now, skip this step and continue to your profile. You can connect accounts at any time.
[Skip this step »](#)

Step 3: Click on the **Find My Heartland Key** button. If a Heartland Key exists based on the taxpayer information, it will populate in the Heartland Key field under the Connect An Account section on the left side of the page.

Connect An Account


Connect your existing accounts to your profile

Connect An Account

ENTER YOUR HEARTLAND KEY BELOW TO
CONNECT AN ACCOUNT.
YOUR HEARTLAND KEY IS LOCATED ON ECSI
COMMUNICATIONS SUCH AS BILLING
STATEMENTS, PAST DUE NOTICES, AND OTHER
NOTIFICATIONS. EXAMPLE:
AA0XX-12345678912



Heartland Key
AA0XX-987A514F12R

I'm not a robot 

Search for Heartland Key

HAVING TROUBLE LOCATING YOUR HEARTLAND
ACCOUNT?

FOR 1098-T TAX FORMS, [CLICK HERE >>](#)

FOR LOAN ACCOUNTS, [CLICK HERE >>](#)

FOR PAST DUE STUDENT ACCOUNTS, [CLICK HERE >>](#)

FOR REFUND DISBURSEMENT ACCOUNTS, [CLICK HERE >>](#)

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