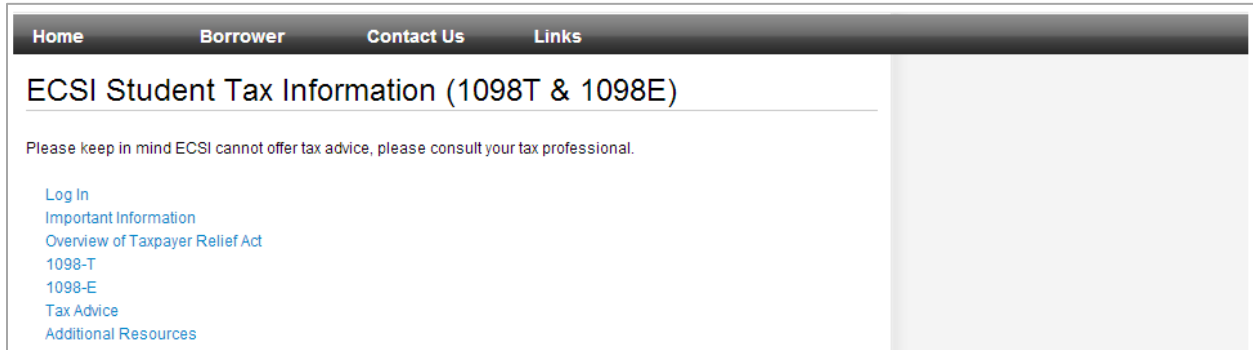


## 5. Student Access

The Student Information Website (<http://www.ecsi.net/taxinfo.html>) is available 24/7. This portal allows students to view valuable information related to their 1098-T statements including how to access their statements online, steps to take to correct their SSN, what to do if the amounts on the form are incorrect and overviews of available tax credits.



### a. *Retrieve Login Credentials*

Students can retrieve their login credentials online by clicking on the "[Click here to retrieve your login credentials](#)" link. Students will be authenticated using their first name, last name, last 4 digits of their social security number, date of birth and zip code. Upon authentication, students will be presented with their school code and PIN/password.

Please Note: All fields are required. You may need to enter information that has been provided directly from your institution, or currently resides on our account (loan, payment plan, etc.) servicing system. If you cannot retrieve your login credentials, please contact our Customer Service Department for assistance.

**Message:**

First Name:

Last Name:

Last 4 of Account Number:  **([SSN/SID/PID])**

Date of Birth:  /  /  (mm/dd/yyyy)

Zip Code:

### b. *Tax Information*

This user interface allows a student to view an electronic copy of any 1098-T statement that was been produced on its behalf.

All tax documents will be available and mailed by January 31st. Please allow one week for delivery. If you have specific questions about why your institution reports in Box 1 or Box 2 please visit <http://www.ecsi.net/taxSelect/student.html> or [click here](#) for more information.

**\*\*Please keep in mind ECSI cannot offer tax advice, please consult your tax professional.\*\***

Below are the tax documents available for your account.

View	Year Type
<input type="radio"/>	2011 1098-T
<input type="radio"/>	2010 1098-T
<input type="radio"/>	2009 1098-T

To view a 1098-T statement, a user must:

- Select the radio button next to the student's information:
  - Select the radio button next to the specific tax year
  - Click [VIEW]

## c. Signup For Electronic Tax Documents

This feature allows a student to opt-in to receive their 1098-T statement electronically.

To opt-in to receive a 1098-T statement electronically, a user must:

By checking the box below, you are giving your consent to receive your 1098T tax documents electronically. By signing up for an electronic version of this tax document, **no** paper form will be mailed to you. An email will be sent containing a link to this website where you may view your documents. You will need your password to gain access to your tax form. In order to protect your privacy, the email will contain **no** information specific to you or your financial information.

Benefits to receiving your forms electronically versus through the regular postal mail:

- Online delivery provides access to the form earlier than the traditional mailing process.
- Online delivery eliminates the chance that the form will get lost, misdirected or delayed during delivery, or misplaced once you receive it.
- Signing up for online delivery is easy and secure. You can change your mind and withdraw from online delivery at any time.
- You can receive your form even while traveling or on assignment away from home.

If you use a *Spam Filter*, please make sure to set your filter to allow mail from [webmaster@ecsi.net](mailto:webmaster@ecsi.net) to get through your filter.

By checking this box, I give my consent to receive my Tax Documents (1098T) electronically at the following email address:

Email:

- This consent is for this and every subsequent year you are eligible for IRS tax form 1098T.
- You can change back to a paper document at any time. You will need to return to the eTax Document Sign-Up page. Once there you should remove the check from the consent box and delete your email address.
- A 1098T document will not be created if no qualified tuition or fees were billed or paid during a given tax year.
- Contact your school directly to update your address information.
- All tax documents will be accessible online for at least 5 years. If you need assistance in any way contact ECSI's 1098T Hotline number at 866-428-1098.

- Check the box authorizing consent to receive the 1098-T statement electronically.
- Enter an email address into the **Email Address:** field and click the **SUBMIT** button.

## d. Live Customer Support

This feature allows a student to communicate with a ECSI customer service representative using live chat via their online web browser.

### Live Customer Service

You are about to connect to a Customer Service Representative using only your browser. While the tool is very intuitive, we have included some instructions below to get you started. If you have any comments or suggestions about Live Customer Service, please feel free to send them to our [Webmaster](#).

You may request information on any topic ranging from finding information on this web site to information about your loan. This is a one-on-one service (not a public chat room) so you can feel free to discuss your issue with our Customer Service Representatives. Chat requests are answered in the order we receive them.

This service is available between the hours of 8:00 AM and 6:00 PM ET, Monday through Friday.

Live Customer Service via Live2Support



## 6. Frequently Asked Questions

- Who should receive a 1098-T statement?
  - A: Per the IRS, you need to furnish a 1098-T statement to any eligible student (even if they do not have a SSN/TIN). Eligible student requirements can be found online at <http://www.irs.gov/instructions/i1098et/index.html>.
- Q: What does ECSI do with 1098-T records that are provided without a social security number ("SSN")?
  - A: When a 1098-T record is provided to ECSI without a SSN/TIN, an ECSI Account Number ("EAN") is created for that record within our system. When that record is submitted to the IRS, it is done so without the EAN. Per IRS regulations, if a 1098-T statement is furnished to a student, the 1098-T data must be submitted to the IRS, regardless of whether they have a SSN/TIN on file.
- Q: Does ECSI provide tax advice?
  - A: ECSI cannot offer tax advice regarding your tax forms. If you have any questions about if or how much interest you can deduct, you should consult with a qualified tax professional or contact the IRS Taxpayer Assistance line at 1-800-829-1040. The IRS web site has many documents concerning TRA-97, including some self-help topics for tax filers.
- Q: What is ECSI's preferred timeline of events for 1098-T Season?

- A: Our desired timeline is as follows, but exceptions can be made, if applicable:
  - September 20th
    - ECSI will begin implementing new TaxSelect 1098-T clients by sending out the ECSI Implementations Welcome email. TaxSelect implementations generally run for 20 to 28 business days based upon the client's availability. Implementations need to be completed no later than January 15th.
  - September 25th
    - ECSI will officially begin the events timeline by sending all returning TaxSelect 1098-T clients the ECSI Welcome Back email.
  - October 1st
    - ECSI will formally announce the events timeline to all TaxSelect 1098-T clients.
  - October 10th
    - ECSI will provide all TaxSelect 1098-T clients with the Student Electronic Opt-In Solicitation email template. This email should be sent to all of students encouraging them to opt-in to receive their 1098-T statements electronically. Students who have opted-in to receive their statements electronically will receive a notification from ECSI informing them that they can access their statements online the same day they have been approved by the client.
  - October 15th
    - ECSI will distribute the TaxSelect 1098-T Postage Invoice to clients. This invoice is due November 15th. The Postage Invoice will reflect the estimated count of your statements multiplied by the standard First Class postal rate.
  - October 20th
    - ECSI will provide clients a copy of the Instructions for Forms 1098-T.
  - November 25th to December 20th
    - ECSI will open the 1098-T data file testing period. During this time, clients can provide ECSI with a 1098-T test data file and ECSI will process the file and post the results online. Clients are only permitted to provide ECSI a test file if their data file layout has changed from prior years.
  - January 2nd to January 15th
    - ECSI will open the 1098-T data file production period. During this time, clients must provide ECSI a 1098-T production data file. Clients are encouraged to provide their production data as soon as possible. Clients that cannot meet the production file deadline are required to email [taxdocs@ecsi.net](mailto:taxdocs@ecsi.net) to discuss an extension.
  - January 21st

- ECSI requires that all processed 1098-T production files be reviewed and approved by this date. This will guarantee that all statements will be printed and mailed by the IRS deadline (January 31st). Clients that cannot meet the approval deadline are required to email [taxdocs@ecsi.net](mailto:taxdocs@ecsi.net) to discuss an extension.
- January 31st
  - This is the deadline for all 1098-T statements to be printed and mailed.
  - ECSI will distribute the TaxSelect 1098-T Final Invoice to clients. This invoice is due February 28th. The 1098-T Final Invoice will reflect the total count of your statements multiplied by the contracted rate minus any paid amount from the 1098-T Postage Invoice.
- February 1st to March 25th
  - ECSI will open the 1098-T correction period. During this time, clients can create, edit or delete 1098-T statements online using the "Create/Edit Tax Documents" feature. All created and edited statements will be included in the IRS data submission (there is no need to contact ECSI when a correction is made).
- March 31st
  - ECSI will submit your 1098-T statement data to the IRS no later than this date. All statements created/edited after this period will be automatically submitted to the IRS at the end of each month (there is no need to contact ECSI when a correction is made).
- August 1st
  - ECSI must submit all corrections to the IRS by this date.
- Q: How does ECSI's call center handle student specific questions about financial information on a 1098-T statement?
  - A: ECSI is responsible for the processing, presentment, issuance and submission of the 1098-T statements. ECSI will provide Tier 1 call center support regarding questions about statement delivery, general statement questions and accessing electronic statements. Questions regarding specific financial information on the 1098-T form must be referred back to the client.
- Q: Can ECSI generate 1098-T statements for a prior tax year?
  - A: ECSI allows a client to generate 1098-T statements for a prior tax year manually online or via a data file in one of our accepted formats. 1098-T statement data generated for a prior tax year are not submitted to the IRS.
- Q: How is a new client Administrative user account created?

# Product Handbook

- A: A request for a new 1098T client administrative user account needs to be sent to [operations@ecsi.net](mailto:operations@ecsi.net). Please include the client code and request for 1098T access in your email, as well as the requested user's name, email address and phone number. An email will be sent to the user with their login instructions once the account has been generated.
- Q: Does ECSI truncate the social security number ("SSN") on the 1098-T statements?
  - A: As of tax year 2013, ECSI truncates the SSN on paper and electronic statements pursuant to proposed regulations §§ 1.6042-4(b) and 301.6109-4 (REG-148873-09).
- Q: How does a student opt-in to receive an electronic statement?
  - A: The student will receive an email from their institution with a client specific link. They student will visit the link and provide their student ID #, name and consent to receive their 1098-T statement electronically. ECSI maintains the consent within our database until the student changes their preference. Students who have opted to receive their 1098-T statement electronically will receive an email notification from ECSI with instructions on how to access their statement online. Student's need their social security number to log in and view their statement. Students who have not opted-in will receive a paper 1098-T statement mailed to the address provided by the client.