

ACCESSING YOUR 1098-T FROM WWW.1098T.COM

Access My 1098-T provides the ability for a student to review specific demographic and financial information provided by the school. This secure, login-based portion of the web site requires the user to provide an SSN and Password. Unauthorized persons will not have access to student information. Only those students attending a TCRS participating school will have information available on the web site.

Entering an SSN and Password:

The first time you log into the 1098-T web site, you will not have a Password. For a first time entry, enter your complete LAST NAME, SSN and CLICK LOGIN.

Assigning a New Password

After entering an SSN without a Password, the system requires the user to enter identity verifying security information. This information must be entered exactly as it appears in the TCRS System because it will be validated against the information on file. If any of the information entered does not match the information on file with TCRS, a new Password will not be assigned.

Login Using a Registration ID

If you did not provide an SSN or TIN to your school you may be able to login using a school registration id. Please note that you will need to obtain the Registration ID from your school. Click link to proceed. Follow instruction to access your record.

1. Enter School Registration ID
2. Enter Last Name
3. Enter Password (if this is your first login leave this field blank)
4. Click Login button
5. Select School attended from select box provided
6. Click the Next button
7. Enter First Name, Mother's Maiden Name and Date of Birth
8. Click Next
9. A system generated Password will be provided
10. Click Proceed to access your record

The information must be entered exactly as it appears in the TCRS system because it will be validated against the information on file. If any of the information entered does not match the information on file with TCRS, a new Password will not be issued.

Accessing Your Record:

Once a valid SSN and password have been entered, your information is returned. This page contains five distinct sections:

1. Student Information
2. School Information
3. View My 1098-T Tax Form
4. View My Financial Information
5. Edit My Record
6. Receive 1098-T Forms Electronically
7. Send an email to TCRS (if your school elects this level of service)

The **Student Information** section provides the student's name, address, phone number, fax number and email if applicable as entered into TCRS.

The **School Information** section contains name and address information for the school (or schools) that the student attends. If a student attends more than one school, all schools attended

for the tax year will be listed within the drop-down box containing the institution's name. Click the down arrow at the right of the box and highlight the school name to review.

Please note - The type of service agreement a school has selected will determine the type of information available to view online. If a school has selected the Full Service option, access to the 1098-T web site and the ability to view the 1098-T form and supplemental (financial) information is available.

The **View My 1098-T Tax Form** section provides the ability to review and print the 1098-T form. This form is mailed to all students and contains the information your school will report to the IRS. The information on the 1098-T includes the school's address, the student's name, SSN and attendance status. If applicable, the 1098-T supplemental form containing financial information can also be viewed and printed. For the first two years of TRA '97 financial information does not need to be reported by the schools to the IRS. If a school does not elect to provide financial information, a Supplemental Notice will not exist.

The **View My Financial Information** section provides reports on aggregate financial information needed for taxpayers to claim tax credits. Each financial description on the Supplemental form has a hyperlink to provide additional detailed information about the reported amount.

The **Edit My Record** option may be used to edit name, address and contact information. Be sure that the correct tax year to modify is selected from the Tax Year drop-down box. The system defaults to the last tax year that TCRS has on file. Enter the information you would like to modify in the fields provided, and click "Save Changes" to commit the updates to the database.

The **Receive 1098-T Form Electronically** provides students the option of receiving their form in an electronic format rather than through the mail. The Student must provide consent on the TCRS Web Site. Please see the link Electronic Delivery of Form 1098-T on www.1098-T.com for more information.

The **Send Email to TCRS** section provides students of Full Service schools the option to correspond with the Tax Credit Reporting Service electronically via Email.