

1098-T Frequently Asked Questions

Where do I find more information about important dates related to the 1098-T product?

A timeline of events is sent out each year. You can contact ECSI to request a copy.

How does a client request a new administrative user to access work on 1098-T functions?

To request a new administrative user, clients are required to send a request through the ticketing system with the following information:

- Your School's Client Code
- Your School's Name
- The full name of the user that needs access
- The email address for the user that needs access

Can I receive training specific to 1098-Ts?

Yes. We will send a communication with the training schedule. That email will include a link to register for training. As well as link to prerecorded trainings that can be watched on your own schedule.

What file formats are accepted by ECSI?

ECSI accepts multiple 1098-T data file layouts including:

- Files meeting the IRS specifications outlined in Publication 1220 found here: <https://www.irs.gov/pub/irs-pdf/p1220.pdf>
- ECSI standard 1098-T data files

**** NOTE: Clients utilizing Touchnet integration MUST send an IRS 1220 file.**

Does ECSI offer file testing for 1098-T statement data?

ECSI offers a testing period for all new 1098-T clients and for clients that have made significant changes to their 1098-T tax statement file format. ECSI will process the test file and upload the statements to our website for the client to review. Test data will be removed before processing of the production files. See the events timeline for testing dates.

What happens when 1098-T statement data is transmitted without a Social Security Number?

Any 1098-T statement data that is transmitted to ECSI without a Social Security Number will be provided an ECSI Account Number ("EAN"). The EAN is for internal purposes only and will not be printed on the 1098-T statement. The form will be submitted to the IRS with the SSN blank per instructions in Publication 1220 from the IRS.

If you do not have an SSN for a student and need an EAN to be created, the SSN field in your file must be left blank for that specific student. The field should not have any spaces or dashes.

The IRS requires you 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 on the IRS website.

Can a 1098-T statement be created, edited or deleted manually?

ECSI allows school administrators to create and edit 1098-T statement data manually using our online Create/Edit Tax Statement module. If you need to delete a group of forms, please follow the process to submit a delete file below.

Create a file that includes the following information for the forms that need to be deleted.



- 2 or 3-digit client code
- tax year (4 digits)
- Social Security Number or ECSI Account Number

Please include headers in your file. The headers should be as follows.

- Client Code
- Year
- SSN/EAN

Please name your file 1098TDeletes.csv

The file should be uploaded to ECSI through EasyPath.

Can ECSI provide a 1096 form?

The 1096 form is used when paper forms are physically submitted to the IRS. ECSI submits form data to the IRS in an electronic format and we cannot provide or generate a 1096 form.

Can I request an extension for submitting or approving my file?

ECSI will accept files after the deadline set forth in the 1098T timeline, however if approval of your 1098-T tax files is not received by the date set forth in the 1098-T timeline, an additional rush fee of up to \$1,000.00 will be assessed to your account. ECSI cannot guarantee that forms will be postmarked by 1/31/2024 if these deadlines are missed.

ECSI also requires that clients review and approve their production 1098-T statement data after we have processed it to ensure accuracy before the 1098-T statements are released to the student population.

Can students access their 1098-Ts online year round?

Students have access to their 1098-T forms year round through the profile they set up.

Students can access their 1098-T statement by visiting <https://heartland.ecsi.net/> using one of the following methods:

- If they already have a user profile with ECSI, please instruct them to sign in. If they have not yet connected their tax statement account to their profile, they will need to connect them using their Heartland Key, which is supplied in the email notice that we send to the student. Instructions to connect an account using the Heartland Key are included in the email that ECSI sends to your students when their tax statement is ready.
- If the student has not yet registered for an account, instruct them to click on the Sign In or Register button in the upper right side of the page and follow the instructions that are provided in the email that ECSI sends to your students when their tax statement is ready.

Who can I talk to if I have questions or concerns?

Your concerns are important to us! Please create a ticket in the ECSI Service Desk and a member of the tax team will get back to you. The link to the ECSI Service Desk is below:

<https://ecsiproduct.atlassian.net/servicedesk/customer/portals>