



Subject: IRS Form 1098-T Available

Current Students:

Please log in to your **myPennWest Student Accounts Portal**, click **View 1098T Statement** to review this statement.

If you have not given consent to receive electronic 1098-T tax information, your form will be mailed to the permanent address on file. Statements will be mailed on January 31. If you previously consented to receive your 1098T electronically and would like to revoke this authorization and receive a paper form in the mail, please make this request in writing from your PennWest email account to studentaccounts@pennwest.edu.

If you would like your authorized user to have access to this statement, you will need to edit your settings to give them permission.

If you need to view a form from 2021 or earlier you **will** need to search for your legacy school of either California, Clarion or Edinboro University.

If you have any questions regarding the financial information on your 1098-T tax form, please contact the PennWest 1098-T response line directly at 814-393-1521. Our office is unable to give any advice about filing taxes; please contact the IRS or your tax advisor with questions about taxes.

Former Students:

The IRS Form 1098-T, Tuition Statement, is now available online at Heartland ECSI

<https://heartland.ecsi.net/index.main.html#/access/signIn>. Please contact Heartland ECSI at 866-428-1098 for questions regarding viewing or printing your tax form.

For tax year 2023 the 1098-T form will come from Pennsylvania Western University not your legacy schools of California, Clarion and Edinboro Universities. If you need to view a form from 2021 or earlier you **will** need to search for your legacy school of either California, Clarion or Edinboro University.

Viewing your 1098-T Tax Form

- Go to: <https://heartland.ecsi.net/index.main.html#/access/signIn>
- If you have not already registered for an account, create an account under "Register" on the right side of the page.
 - Step 1
 - Choose a username (the system will tell you if the name is available)
 - Create a password of your choosing.
 - Click "Continue"
 - Step 2
 - Enter your contact information requested.
 - Click "Continue"
 - Step 3
 - Enter your address.
 - Click "Continue"
 - Step 4
 - Create 3 Security Questions and Answers
 - Click the "I'm not a robot" box.
 - Click "Save your profile."
 - The system will take a minute or so to save but a successful completion will result in a return to the home page with a green message at the top. "Congratulations! You have successfully created your user profile. Please sign in to connect and access your accounts."
 - You will also get an email confirmation from ECSI confirming the creation of your Easy Path account, note that the Heartland Key in the email is an example not your actual Heartland Key.
 - Follow the instructions below to access your form.

- If you have already registered for an online account, enter your username and password on the left side under “Sign In”
 - Enter your username and password
 - Click “Continue”
 - Next click a method to receive your verification code (Text, Automated Call, or Email)
 - Click the “I’m not a robot” box.
 - Click “Send Verification Code”
 - Enter the verification code you receive.
 - Click “Continue”
 - Click the Blue Plus Sign to Connect an Account to your profile.
 - To find your heartland key account:
 - You will need to call ECSI at 1-866-428-1098
 - There may be an extended wait, but the system does offer an opportunity to save your place in line and be called automatically when it is your turn.
 - Once you have connected your account, you will not need to do these steps again.
 - Next click on your Heartland Key under “Tax Documents and Information” below your school’s name.
 - Any tax forms available for your school will be displayed here.
 - Select 'View/Print Statement' next to the desired form to view.
 - If you are looking for prior year forms, click on the history tab.

Note: You must allow “pop-ups” to view and print your tax forms. For information on enabling browser pop-up windows [click here](#).



You, or the person who can claim you as a dependent, may be able to claim an education credit on Form 1040 or 1040-SR. This statement has been furnished to you by an eligible educational institution in which you are enrolled, or by an insurer who makes reimbursements or refunds of qualified tuition and related expenses to you. This statement is required to support any claim for an education credit. Retain this statement for your records. To see if you qualify for a credit, and for help in calculating the amount of your credit, see Pub. 970, Form 8863, and the Instructions for Forms 1040 and 1040-SR.

Your institution must include its name, address, and information contact telephone number on this statement. It may also include contact information for a service provider. Although the filer or the service provider may be able to answer certain questions about the statement, do not contact the filer or the service provider for explanations of the requirements for (and how to figure) any education credit that you may claim.

Student's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS. **Caution:** If your TIN is not shown in this box, your school was not able to provide it. Contact your school if you have questions.

Account number. May show an account or other unique number the filer assigned to distinguish your account.

Box 1. Shows the total payments received by an eligible educational institution in 2023 from any source for qualified tuition and related expenses less any reimbursements or refunds made during 2023 that relate to those payments received during 2023.

Box 2. Reserved.

Box 3. Reserved.

Box 4. Shows any adjustment made by an eligible educational institution for a prior year for qualified tuition and related expenses that were reported on a prior year Form 1098-T. This amount may reduce any allowable education credit that you claimed for the prior year (may result in an increase in tax liability for the year of the refund). See "recapture" in the index to Pub. 970 to report a reduction in your education credit or tuition and fees deduction.

Box 5. Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of the education credit you claim for the year.

Tip. You may be able to increase the combined value of an education credit and certain educational assistance (including Pell Grants) if the student includes some or all of the educational assistance in income in the year it is received. For details, see Pub. 970.

Box 6. Shows adjustments to scholarships or grants for a prior year. This amount may affect the amount of any allowable tuition and fees deduction or education credit that you claimed for the prior year. You may have to file an amended income tax return (Form 1040X) for the prior year.

Box 7. Shows whether the amount in box 1 includes amounts for an academic period beginning January-March 2024. See Pub. 970 for how to report these amounts.

Box 8. Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution.



Box 9. Shows whether you are considered to be enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level educational credential.

Box 10. Shows the total amount of reimbursements or refunds of qualified tuition and related expenses made by an insurer. The amount of reimbursements or refunds for the calendar year may reduce the amount of any education credit you can claim for the year (may result in an increase in tax liability for the year of the refund).

Future developments. For the latest information about developments related to Form 1098-T and its instructions, such as legislation enacted after they were published, go to www.irs.gov/form1098t.