

Guide to Access 1098-T Online through Heartland ECSI

To view and print your 1098-T please visit:

<https://heartland.ecsi.net/index.main.html#/access/lookup>

(If you are having issues viewing/printing from the Heartland ECSI website try Internet Explorer or another web browser)

1. Under school name begin typing: "California State University San Bernardino", then press the Submit button:

Search For Your Tax Document

This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker for this site. To turn off your Pop-up blocker, visit the Tools or Settings menu for your specific browser.

First, let's check to make sure your school has posted their tax documents.

School Name (start by typing the first several letters of your school name)

California State

- California State University - Monterey Bay
- California State University Channel Islands
- California State University East Bay
- California State University Fullerton
- California State University San Bernardino
- California State University San Marcos
- California State University Stanislaus
- California State University, International Programs

Submit

Guide to Access 1098-T Online through Heartland ECSI

- Next input your first name, last name, SSN or TIN and Zip Code.

(If your address has changed and has not been updated with CSUSB, please input the last zip code you had on file with CSUSB in order to find your 1098-T)

Search for Your Tax Document

This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker for this site. To turn off your Pop-up blocker, visit the Tools or Settings menu for your specific browser.

We've found your school. Let's fill in the rest of the form to find your tax document.
IMPORTANT: The information entered below must match the information your school has on file.

School Name (start by typing the first several letters of your school name)

California State University San Bernardino

First Name

Last Name

SSN

Zip Code

I'm not a robot  reCAPTCHA
Privacy - Terms

Continue

Guide to Access 1098-T Online through Heartland ECSI

3. In the next page your tax statements are available. To view the 1098-T statement(s) select the "+" on the right-hand side:

Tax Document Information

This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker for this site. To turn off your Pop-up blocker, visit the Tools or Settings menu for your specific browser.

YOUR TAX STATEMENT

STATEMENT DETAIL FOR CURRENT REPORTING PERIOD

1098-T STATEMENT Status: Delivered **+**

1098-E STATEMENT Status: Delivered **+**

4. Here you will see your 1098-T statement, look for the tax year you need, and on the right-hand side you can select "view/print statement"

YOUR TAX STATEMENT

STATEMENT DETAIL FOR CURRENT REPORTING PERIOD

1098-T STATEMENT **SAMPLE** Status: Delivered **-**

Reporting Institution: **California State University San Bernardino** Tax Year: **View/Print Statement »**

Delivery Address:

Box 1 ("Payments"): Box 2 ("Charges"): **Make a Change »**
Select this option if you would like to update your SSN, Name or Address listed on your tax form.

Box 3 ("Reporting Method Changed"): Box 4 ("Prior Year Adjustments"): **Create a Dispute »**
Select this option if you disagree with information shown in the boxes of your tax form.

Box 5 ("Scholarships & Grants"): Box 6 ("Prior Year Adjustments (scholarships/grants)":

Box 7 ("Amounts for Upcoming Term"): Box 8 ("Half-Time or Above"):

Box 9 ("Graduate Student"): Box 10 ("Ins. Contract Reimb./Refund"):

Guide to Access 1098-T Online through Heartland ECSI

Additional Information:

Heartland ECSI can be reached at 866-428-1098 if you run into any issues with the Heartland ECSI website or if you would like a copy of your 1098-T statement mailed to your mailing address.

For any additional questions about your 1098-T statement please contact Student Financial Services at 909-537-5162 or by email to sfs@csusb.edu.