

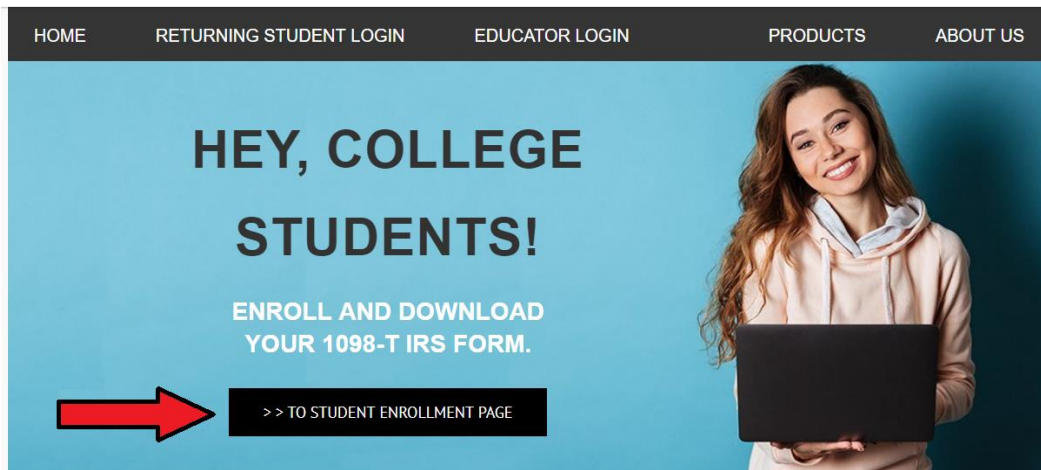
1098-T Form Student Enrollment and Download Information

Below are instructions for accessing 1098-T Forms for students attending a college partnering with Financial Payments for 1098-T Processing. Protecting student financial information is extremely important and requires multiple steps to verify the student's identity and email so that only approved individuals can access, view, print or download a 1098-T.

If at any time the process displays an error, it's best to close out of your browser completely and begin again with a **NEW USERNAME!** Internet Explorer has caused several challenges for Enrollment, so we suggest using another web browser, such as Chrome, Firefox, or Safari.

Step 1

Go to 1098tforms.com website and click on the black rectangle with instructions: TO STUDENT ENROLLMENT PAGE.



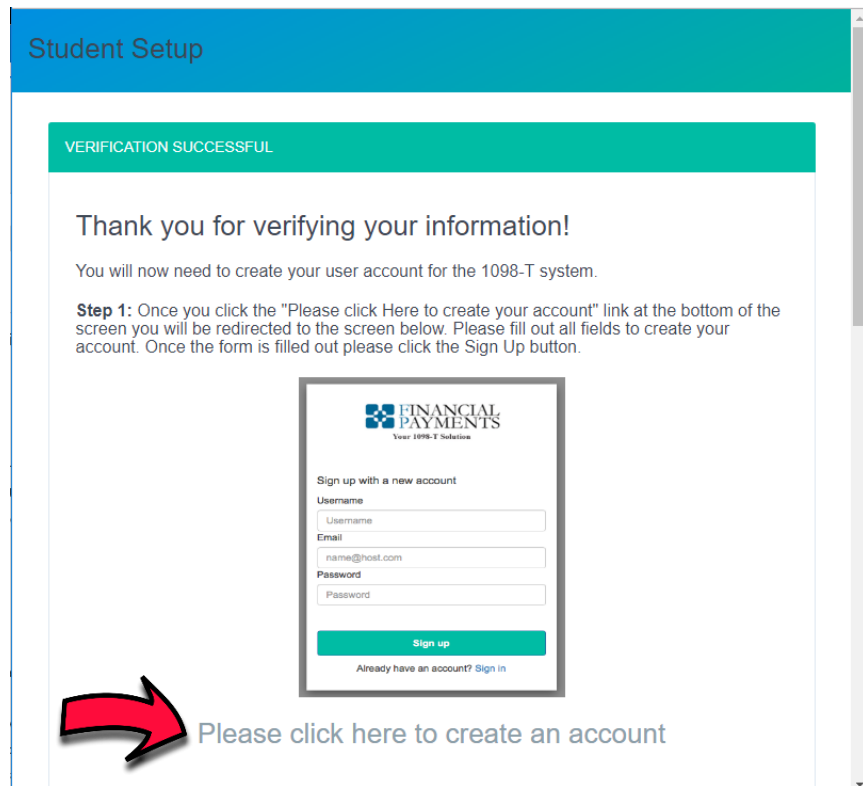
Step 2

The Student Setup Page appears with the instructions, PLEASE VERIFY YOUR STUDENT INFORMATION. Please enter your first name, last name and social security number in the relevant boxes. Please click the VERIFY INFORMATION box/link.

The image shows the "Student Setup" page. At the top is a teal header with the text "Student Setup". Below this is a white box with a teal header that says "PLEASE VERIFY YOUR STUDENT INFORMATION". Inside this box are three input fields: "First Name", "Last Name", and "Social Security Number". Each field has a placeholder text with the same name. Below these fields is a section with two questions and answers. The first question is "Q: How will my information be used?" and the answer is "A: The information you provide will be used to determine that you have a valid 1098-T record within our system in accordance with our privacy policy." The second question is "Q: What if a record is not found after clicking the Verify Information link?" and the answer is "A: If your information is not found, please try again at a later time or contact your college's business office." At the bottom right of the white box is a teal button with white text that says "Verify Information". A large red arrow points from the left towards the "First Name" input field. Another large red arrow points from the bottom towards the "Verify Information" button.

Step 3

You will be prompted VERIFICATION SUCCESSFUL on the next page. There are several instructions on this page.
Please just click the link PLEASE CLICK HERE TO CREATE AN ACCOUNT.



The screenshot shows a web page titled "Student Setup" with a teal header. Below the header is a teal banner that says "VERIFICATION SUCCESSFUL". The main content area has a white background and contains the following text:

Thank you for verifying your information!

You will now need to create your user account for the 1098-T system.

Step 1: Once you click the "Please click Here to create your account" link at the bottom of the screen you will be redirected to the screen below. Please fill out all fields to create your account. Once the form is filled out please click the Sign Up button.

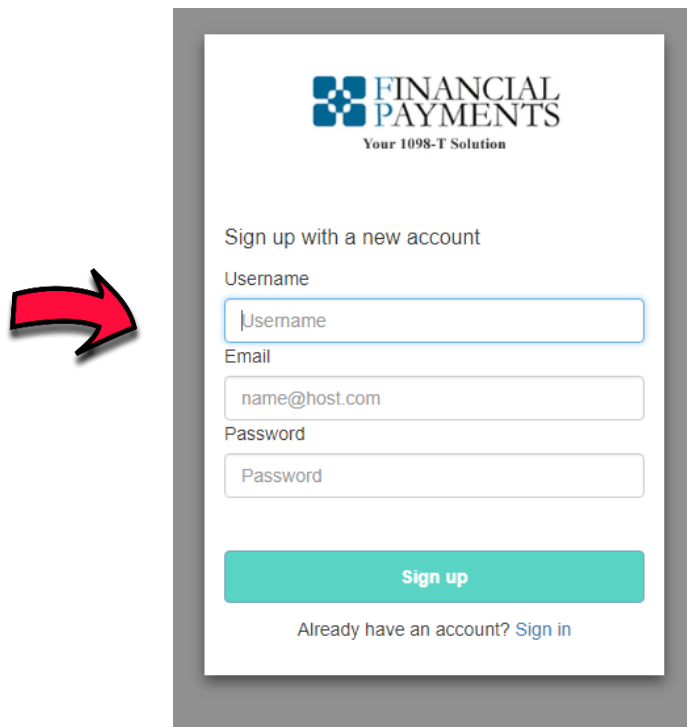
Below the text is a sign-up form with the "FINANCIAL PAYMENTS" logo and the tagline "Your 1098-T Solution". The form is titled "Sign up with a new account" and contains the following fields:

- Username:
- Email:
- Password:

At the bottom of the form is a teal "Sign up" button and a link that says "Already have an account? Sign in". A red arrow points from the text "Please click here to create an account" to the "Sign up" button.

Step 4

Please enter a Username, Email and Password. Record this information to remember it later. Now Click the SIGN UP link.



The screenshot shows a sign-up form with the "FINANCIAL PAYMENTS" logo and the tagline "Your 1098-T Solution". The form is titled "Sign up with a new account" and contains the following fields:

- Username:
- Email:
- Password:

At the bottom of the form is a teal "Sign up" button and a link that says "Already have an account? Sign in". A red arrow points from the left to the "Username" field.

Step 5

The message below will appear.

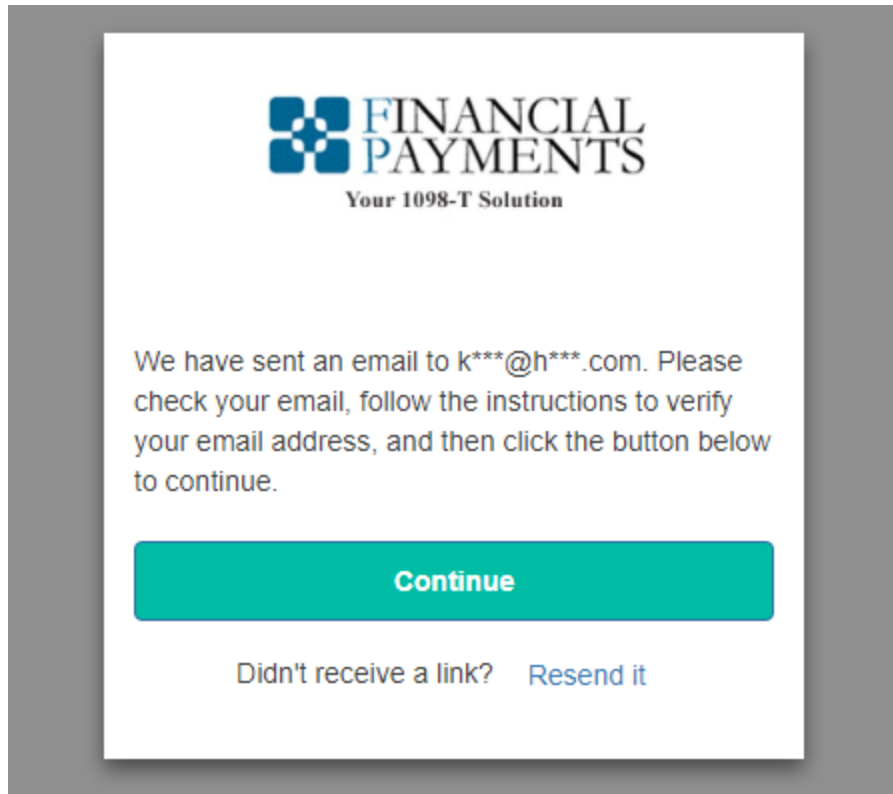
DO NOT click on the Continue Link yet!

First, open your email account that you used in the account setup.

Next, open the email with "1098-T Account Verification" in the Subject Heading.

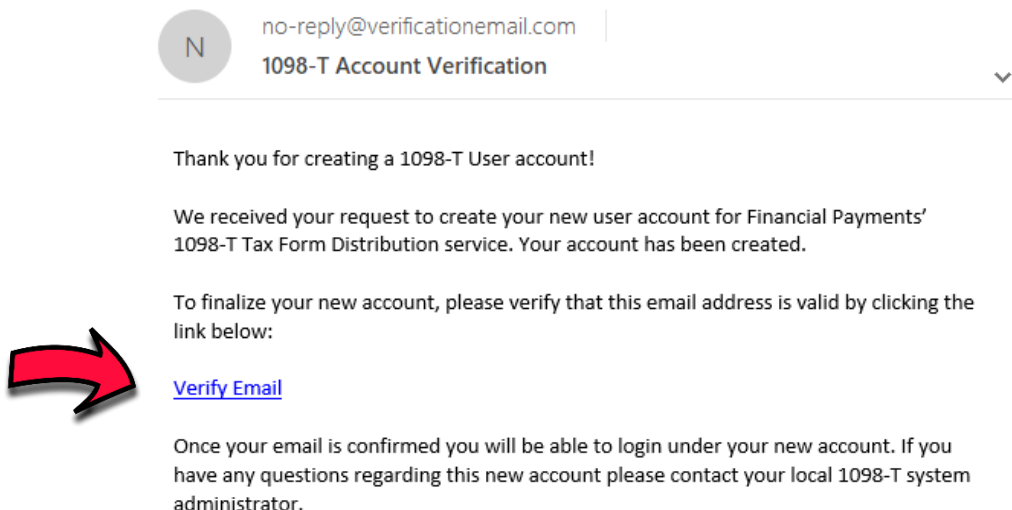
The email will be from: No-reply@verificationemail.com

Review the email in Step 6 below.



Step 6

After opening the "1098-T Account Verification" email, the following message should appear. Read it and then please click on the VERIFY EMAIL link.



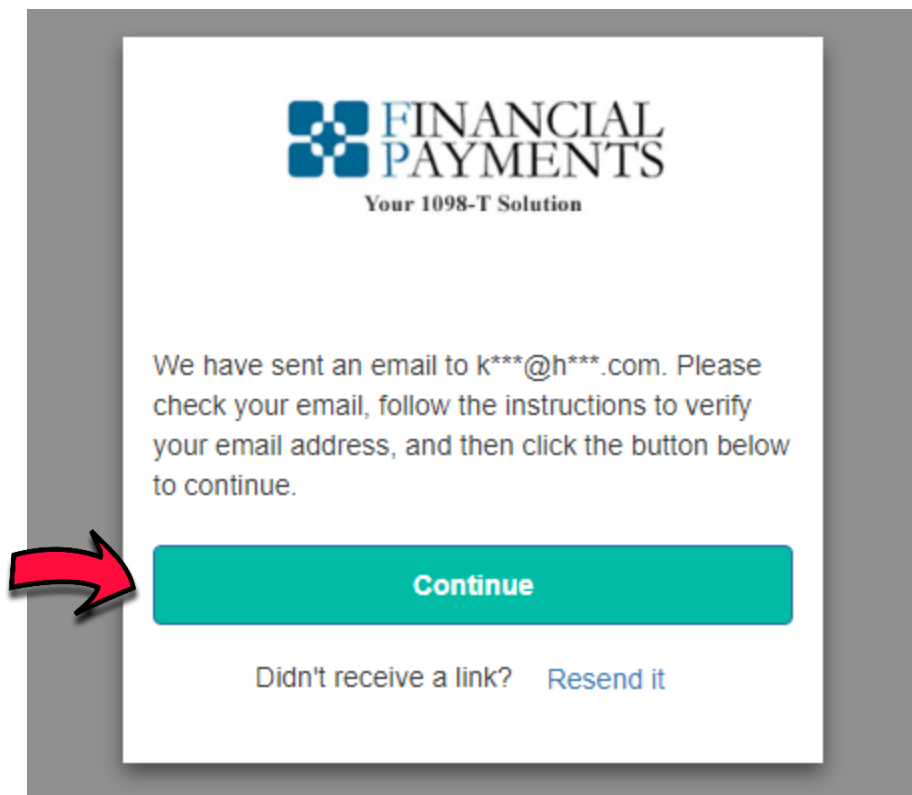
Step 7

The following image will appear after clicking the VERIFY EMAIL link.
The image confirms that your registration has been confirmed.




Step 8


You may now go back to the web browser screen and click CONTINUE.



Step 9

You may now enter your USERNAME and PASSWORD for the account. Please click on the Sign In link.



 **FINANCIAL
PAYMENTS**
Your 1098-T Solution

Sign in with your username and password

Username

Password

[Forgot your password?](#)

Sign in

Need an account? [Sign up](#)

Step 10

Your enrollment is complete, and you've LOGGED IN successfully. Now you must agree to the conditions set out in the Electronic Consent form for 1098-T. Please click on the AGREE link at the bottom of the page.
(This image does not show the entire form.)

Student Portal [Sign Out](#)

ELECTRONIC COMMUNICATION CONSENT

Q: Why should I elect to receive my 1098-T digitally?
A: Electronic delivery is immediate and more secure since you won't run the risk of a document with your SSN being lost in the mail.

[Electronic Communication Consent](#)


Online Service Electronic Communication Disclosure and Consent

Please review this document carefully and print a copy for your reference.

This Online Service Electronic Communication Disclosure and Consent ("Disclosure"), applies to all communications for those products and services offered through our 1098-T processing application.

Consent

By selecting "Accept", you represent that you have read and understand this Disclosure and that you affirmatively consent to receive all communications regarding the Services that are offered through our online service electronically as described herein. You are also confirming that you have the authority to consent on behalf of the person responsible for making payments to your Institution using the Services. You agree that we do not need to provide you with an additional paper (non-electronic) copy of the communications, unless specifically requested. You further agree that your computer satisfies the hardware and software requirements specified above and that you have provided us with a current e-mail address at which we may send electronic communications to you.




Step 11

After agreeing to the 1098-T Consent form, your Enrollment is complete, and you can click on the **PLEASE CLICK HERE TO ACCESS YOUR 1098-T FORM.**

Student Setup

YOUR ENROLLMENT IS COMPLETE

 [Please Click Here to Access Your 1098-T Form](#)


Step 12

Check the name of the college/university you attend in the window below. If it's correct, click the View/Download Link.

Student Portal

VIEW / DOWNLOAD YOUR 1098-T FORM

Name of Your College/University
2017 Form 1098-T



Step 13

The student's 1098-T form will appear in a PDF. You may view, print or download the form at this time. The image below is a blank form and NOT an actual 1098-T.

☐ VOID ☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number

1 Payments received for qualified tuition and related expenses

2 Amounts billed for qualified tuition and related expenses

FILER'S federal identification no.

STUDENT'S taxpayer identification no.

3 Check if you have

STUDENT'S name

4

Street address (including apt. no.)

5

City or town, state or province, country, and ZIP or foreign postal code

6 Adjustments to scholarships or grants for a prior year

7 Check this box if the amount in box 1 or 2 includes amounts for an academic period beginning January—March 2018

8 Check if at least half-time student

9 Check if a graduate student

10 Ins. contract reimb./refund

OMB No. 1545-1574

2017
Form 1098-T

Tuition Statement
SAMPLE

Copy A
For Internal Revenue Service Center
File with Form 1096.

For Privacy Act and Paperwork Reduction Act Notice, see the 2017 General Instructions for Certain Information Returns.

Form **1098-T** Cat. No. 25087J www.irs.gov/form1098t Department of the Treasury - Internal Revenue Service

Do Not Cut or Separate Forms on This Page — Do Not Cut or Separate Forms on This Page