



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.

For tax year 2022 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.

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/lookup>. Please contact Heartland ECSI at 866-428-1098 for questions regarding viewing or printing your tax form.

For tax year 2022 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

1. Go to <https://heartland.ecsi.net/index.main.html#/access/lookup>.
2. Under School Search, enter Pennsylvania Western University to view 2022 form.
3. Enter personal information and continue
First and Last Name, Social Security Number, and ,Zip Code that appears on 1098-T (Permanent address listed with school)
4. Click the "+" symbol by the "1098-T Statement" line
5. View/Print statement for tax year you would like to review

Note: You must allow "pop-ups" to view and print your tax forms. For information on enabling browser pup-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 Form 1040A. To see if you qualify for a credit, and for help in calculating the amount of your credit, see Pub. 970, Tax Benefits for Education; Form 8863, Education Credits; and the Form 1040 or 1040A instructions. Please note: Education credits may only be claimed for **qualified tuition and related expenses** that were actually **paid** during the calendar year. PennWest reports the amounts **paid** during the calendar year in box 1. The amount shown in box 1 may represent an amount other than the amount actually paid to the university during the tax year because of payments for non-qualified charges (housing, parking, health center etc.). You may want to review your invoices or account activity page accessible on your myPennWest account for information on payments you have made within the tax year.

The following information is also provided on the IRS Form 1098-T:

Box 1 shows the total amounts paid in calendar year for qualified tuition and related expenses less any reimbursements or refunds made during calendar year that relate to those payments received for qualified tuition and related expenses during calendar year. The amount reported is not reduced by scholarships and grants reported in box 5.

Box 4 shows any adjustments made 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 (which 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.

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 or 2 includes amounts for an academic period beginning January - March (future year). 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.)