

# 1098-T Student Enrollment and Download Instructions

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

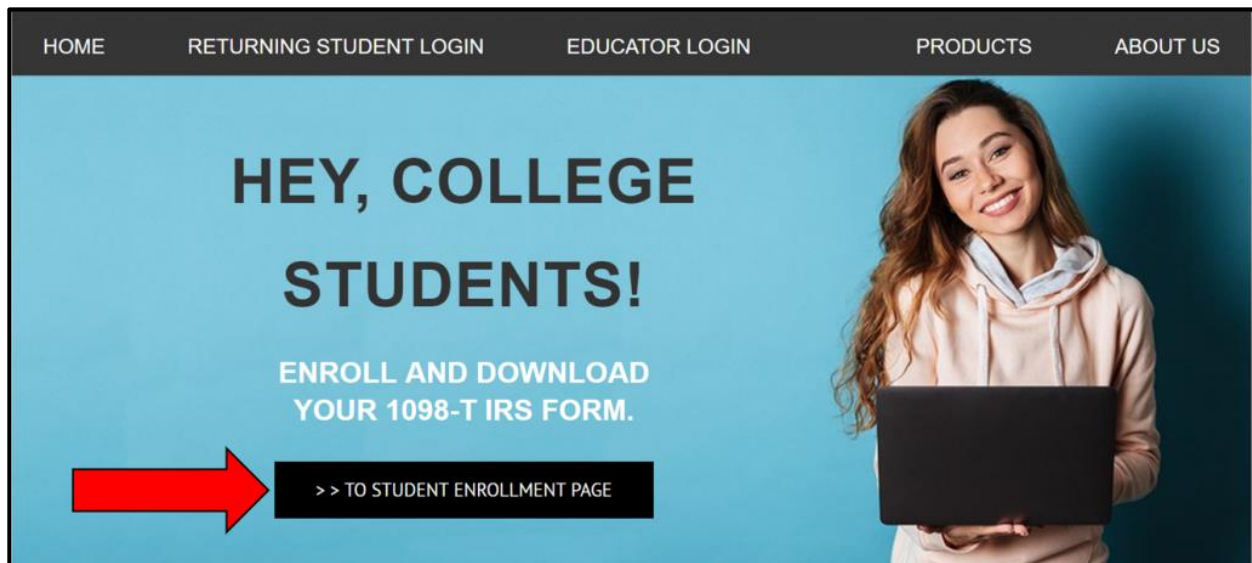
If at any time the process displays an error, it is best to close out of your browser completely and begin again with a **NEW USERNAME**. Internet Explorer has caused several challenges for Enrollment, so we suggest using another web browser, such as Chrome, Firefox, or Safari.



## STEP 1

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

**TO STUDENT ENROLLMENT PAGE.**



## STEP 2

The Student Enrollment Page appears, **HELP US FIND YOUR STUDENT INFORMATION**. By entering your first name, last name and social security number in the relevant boxes.

Please click the **VERIFY INFORMATION** box/link.

Student Enrollment

HELP US FIND YOUR INFORMATION

First Name	Last Name	Social Security Number
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Social Security Number"/>

In accordance with our privacy policy, the information you provide will be used to determine that you have a valid 1098-T record within our system.

Need Help? [Click Here for instructions.](#)

**Let's Go**

## STEP 3

You will be prompted **CONGRATULATIONS! WE FOUND YOUR INFORMATION.** on the next page. Please enter a valid Email Address. Then create a new Username and Password. You will need to remember this information to login in the future.

Then click the **ENROLL NOW** link.

CONGRATULATIONS! WE FOUND YOUR INFORMATION.

Please enter a valid Email Address and create your new Username and Password

First Name	<input type="text" value="John"/>
Last Name	<input type="text" value="Smith"/>
Social Security Number	<input type="text" value="....."/>
Email Address	<input type="text" value="Email Address"/>
Username	<input type="text" value="Username"/>
Password	<input type="password" value="Password"/>
Confirm Password	<input type="password" value="Confirm Password"/>

\*Passwords must contain at least one number and one uppercase letter and be at least 8 characters

[Enroll Now](#)



## STEP 4

The message below will appear.

**DO NOT CLICK on LOGIN NOW yet!**

First, check the inbox of the email address which was used to set up your 1098-T account, including the "Junk Mail" folder, for an email requesting Verification.

### Student Enrollment

For security purposes, a verification link was sent to the email address you provided.

1. Please CHECK your inbox for an email from no-reply@verificationemail.com
2. OPEN the email and Click "Verify Email"
3. A "Registration has been successful" window will appear. Please CLOSE it, RETURN to this screen and LOGIN below.

✓ If you DID NOT receive a verification email, please check your junk mail folder. If the verification email is still not found, [CLICK HERE](#) to generate a new email and repeat steps 1-3.

Please LOGIN to Access Your 1098-T Form

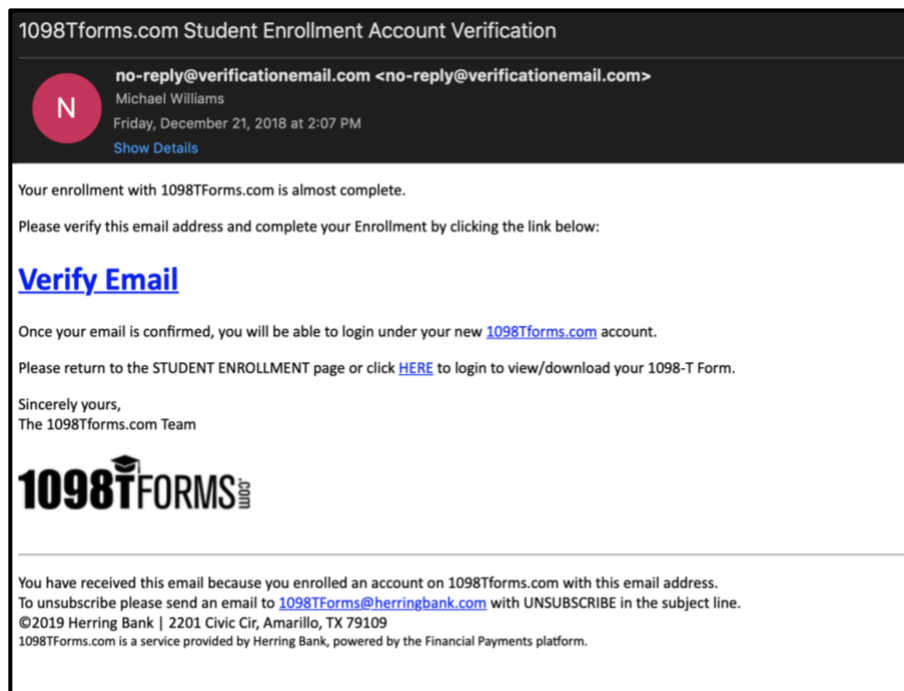
[LOGIN NOW](#)

## STEP 5

Next, open the email with **“1098Tforms.com Student Enrollment Account Verification”** in the subject heading.

The email will be sent from [no-reply@verificationemail.com](mailto:no-reply@verificationemail.com)

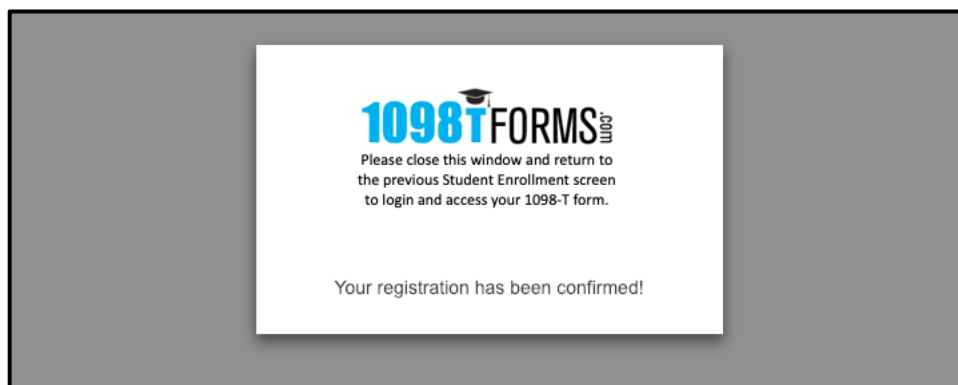
Upon opening, the email should look like to the following capture



After reading it, click on the **VERIFY EMAIL** link.

## STEP 6

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



## STEP 7


You may now return to the Enrollment screen and **Login Now**.

The image shows a web page titled "Student Enrollment" with a teal header. The main content area is white and contains a light gray box with instructions. The instructions state: "For security purposes, a verification link was sent to the email address you provided." followed by a numbered list: 1. Please CHECK your inbox for an email from no-reply@verificationemail.com; 2. OPEN the email and Click "Verify Email"; 3. A "Registration has been successful" window will appear. Please CLOSE it, RETURN to this screen and LOGIN below. Below the list, there is a checkmark icon and text: "If you DID NOT receive a verification email, please check your junk mail folder. If the verification email is still not found, CLICK HERE to generate a new email and repeat steps 1-3." At the bottom of the light gray box, it says "Please LOGIN to Access Your 1098-T Form". To the right of this text is a teal button with the text "LOGIN NOW" in white.

## STEP 8

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

1098-T Login



[Forgot Username](#) • [Forgot Password](#)

[Login Now](#)

[Return to 1098TForms.com](#)

1098TForms.com is a service provided by Herring Bank,  
powered by the Financial Payments platform.



## STEP 9

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. Click on the **AGREE** link at the bottom of the page. *(The image below does not show the entire consent form)*

View / Download Your 1098-T Form

**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.

The words "we," "us," and "our" refer to Financial Payments, which has entered into an agreement with your college or university to process your 1098-T tax form, for your college or university (the "Institution")

**Consent**

By selecting "Agree", 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.

**Agree** **Disagree**



## STEP 10

Check the name of the college/university you attend in the window below. If it is correct, click the **VIEW / DOWNLOAD** link.

View / Download Your 1098-T Form

FINANCIAL PAYMENTS TEST SCHOOL

2017 Form 1098-T

View / Download

# STEP 11

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)

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	OMB No. 1545-1574	Tuition Statement
<b>Financial Payments Test School</b> <b>PO BOX 12345</b> <b>Amarillo, TX 79111</b> <b>(806) 111-1111</b>		<b>\$ 54,610.00</b>	<b>2018</b> Form 1098-T	
FILER'S employer identification no.	STUDENT'S TIN	3 If this box is checked, your educational institution changed its reporting method for 2018		<b>Copy B For Student</b> This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return.
77-7777777	000-12-3456	<input type="checkbox"/>		
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants	
<b>John Smith</b>		<b>\$ 651.00</b>	<b>\$ 615.00</b>	
Street address (including apt. no.)		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January—March 2019 ▶	
<b>123 Main St</b>		<b>\$ 651.00</b>	<input checked="" type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code				
<b>Amarillo, TX 79106</b>				
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student	9 Checked if a graduate student	10 Other	
<b>A12349</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<b>\$</b>	

Form 1098-T (keep for your records) www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service

