

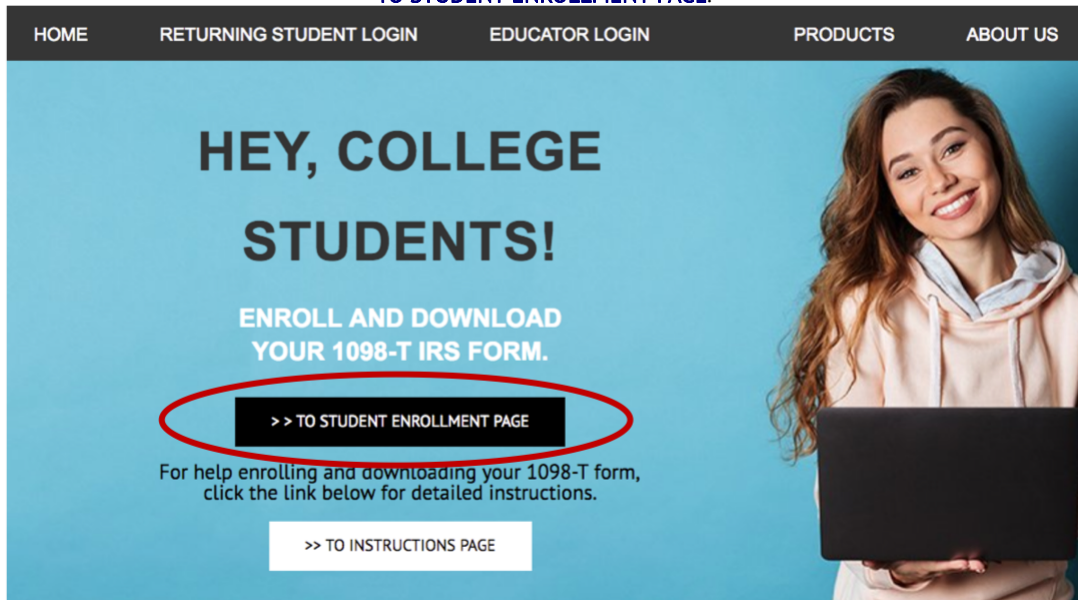
# 1098-T Student Enrollment and Download Instructions

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](https://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.](#)

### 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

### STEP 4

The message below will appear.

**DO NOT CLICK** on step 6 **CLICK HERE** 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.

For security purposes, a verification link was sent to the email address you provided. Follow these steps to access your 1098-T Form:

1. Please CHECK your inbox for an email from [no-reply@verificationemail.com](mailto:no-reply@verificationemail.com)
2. If you DID NOT receive a verification email, please check your junk mail folder
3. If the verification email is still not found, **CLICK HERE** to generate a new email and repeat steps 1-2 before continuing to #4
4. OPEN the email and CLICK the "Verify Email" link **You must CLICK the link before moving forward**
5. A "Registration has been confirmed" window will appear. Please CLOSE it.
6. Once you have completed all steps above and have verified your email address please **CLICK HERE**

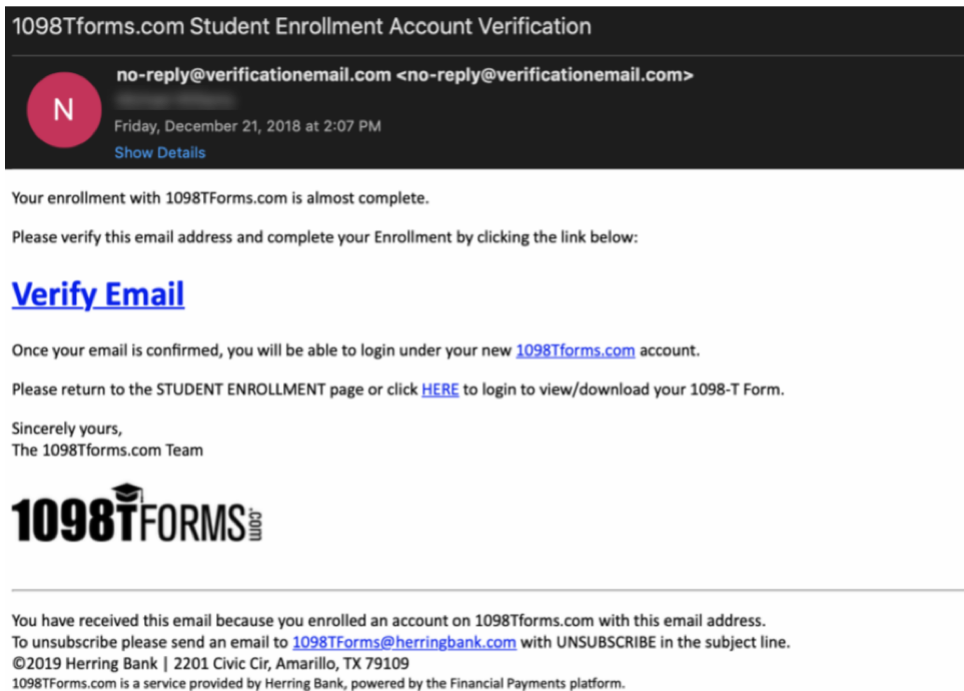
## STEP 5

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 the below.

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 click the step 6 [CLICK HERE](#).

### Student Enrollment

For security purposes, a verification link was sent to the email address you provided. Follow these steps to access your 1098-T Form:

1. Please CHECK your inbox for an email from no-reply@verificationemail.com
2. If you DID NOT receive a verification email, please check your junk mail folder
3. If the verification email is still not found, [CLICK HERE](#) to generate a new email and repeat steps 1-2 before continuing to #4
4. OPEN the email and CLICK the "Verify Email" link **You must CLICK the link before moving forward**
5. A "Registration has been confirmed" window will appear. Please CLOSE it.
6. Once you have completed all steps above and have verified your email address please [CLICK HERE](#)

## STEP 8

You will arrive at a page in which you can return to the previous page or click the button to [LOGIN NOW](#) which you should click only if you have registered your email correctly.

### Student Enrollment

If you have completed all of the steps from the previous page and have verified your email address, please click the button below to login.

[← PREVIOUS PAGE](#)

[LOGIN NOW](#)

## STEP 9

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



1098-T Login

**1098TFORMS**.com

Username

Password

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

[Login Now](#)

Click [HERE](#) for help changing your password

[Return to 1098TForms.com](#)

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

## 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. 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 you 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 11

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

FINANCIAL PAYMENTS TEST SCHOOL

2017 Form 1098-T

View / Download

## STEP 12

Your 1098-T form will appear in a PDF. You may view, print or download the form at this time. *(Sample form shown below)*

☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number <b>Financial Payments Test School</b> <b>PO BOX 12345</b> <b>Amarillo, TX 79111</b> <b>(806) 111-1111</b>		1 Payments received for qualified tuition and related expenses <b>\$ 1,022.00</b>	OMB No. 1545-1574 <b>2019</b> Form 1098-T	<b>Tuition Statement</b>  <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.
FILER'S employer identification no. <b>77-7777777</b>	STUDENT'S TIN <b>333-22-1111</b>	2	3	
STUDENT'S name <b>John Smith</b>		4 Adjustments made for a prior year <b>\$ 22.00</b>	5 Scholarships or grants <b>\$ 990.00</b>	
Street address (including apt. no.) <b>1234 Main St.</b>		6 Adjustments to scholarships or grants for a prior year <b>\$ 10.00</b>	7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2020 <input checked="" type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code <b>Amarillo, TX 79106</b>		8 Check if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input checked="" type="checkbox"/>	
Service Provider/Acct. No. (see instructions) <b>1234567890</b>	10 Other <b>\$</b>			

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