

1098-T Tax Statements

How to access the most recent 1098-T on InsideCBU

- Login to InsideCBU with your student ID and password
- Go to the “Student Accounts” tab
- Click on “My Account Information” icon
- Click on “1098-T”
- The statement summary will be displayed
- Select “View/Print Statement”
- A PDF version of your 1098-T form will be downloaded

How to access previous 1098-T forms online via ECSI

- Visit <https://heartland.ecsi.net>
- Select “Help Center” at the top of the page
- Scroll down and click on “Tax Documents”
- Select “Want to look up your 1098-T or 1098-E tax form? Click here to start your search”
- Type in “California Baptist University” and click on the name when highlighted
- Click Submit and then enter your personal information (note: enter the zip code of the address you lived at during the desired tax year)
- Click on the box next to “I’m not a robot” then press Continue
- Once logged in, you can access the most recent tax documents by clicking on the “+” button next to the statement
- The statement summary will be displayed
- Select “View/Print Statement”

Effective for the 2018 tax year California Baptist University reports the following 1098-T information according to federal guidelines

- Box 1 Payments received for qualified tuition and related expenses (This amount will not be greater than the amount billed for eligible tuition and fees. Room and board is not included.)*
- Box 3 Checkbox for Change of Reporting (Checked for 2018 as it is the first year in which Box 1 is used.)
- Box 4 Payment Adjustments for a Prior Year (Will be blank for 2018, as payments were not previously reported.)
- Box 5 Scholarship/Grant amount credited for the current year and the previous year.
- Box 6 Scholarship/Grant amount debited due to the reversal of aid for the previous year.
- Box 8 Check if enrolled at least half time.
- Box 9 Check if enrolled as a Graduate student.

For 2017 and prior tax years California Baptist University reported the following 1098-T information according to federal guidelines

- Box 2 Amount billed in the current year for eligible tuition and fees.
- Box 4 Amount credited in the current year due to a reduction in charges from the previous year.
- Box 5 Scholarship/Grant amount credited for the current year and the previous year.
- Box 6 Scholarship/Grant amount debited due to the reversal of aid for the previous year.
- Box 8 Check if enrolled at least half time.
- Box 9 Check if enrolled as a Graduate student.

***The current year begins in January and ends in December.** Spring tuition is billed in January, Summer tuition is billed in May, and Fall tuition is billed in August. Contact a tax professional for questions related to payments or financial aid transactions that occur in a different year from which charges were billed.

California Baptist University has partnered with Heartland ECSI to provide 1098-T tax statements. All 1098-T's are mailed to the permanent address on record at the time of processing. If you did not receive your 1098-T or need another copy, please contact the Student Accounts Office at 951-343-4371.

For tax information and resources regarding 1098-T's go to www.ecsi.net/1098T

Students who have not provided CBU with their Social Security Number will be asked to complete the substitute form [W-9s](#).

What if the Social Security Number on my tax form is incorrect?

To correct your Social Security Number (SSN) on your tax form, you must provide a copy of your Social Security Card to the Office of the University Registrar.