

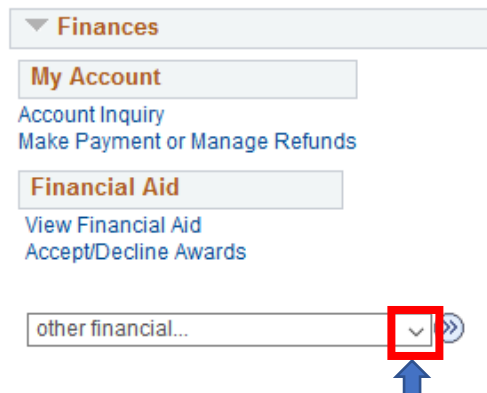
1098-T Steps to Complete Self-Serve Consent

UW-Green Bay has implemented student “self-serve” in SIS for accessing your IRS 1098-T tax document for all campus location students.

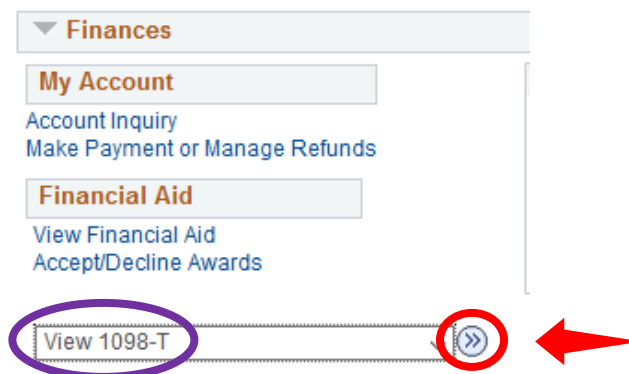
- The SIS 1098-T ‘Self-Serve’ option is available for students to access the IRS document for calendar years 2019 and forward.
- All UW-Green Bay students with access to their student account in SIS have the ability to view and print their 1098-T form directly from their SIS ‘home’ page beginning with Tax Year 2019 and forward.
- When **you ‘view’ your 1098-T we recommend you *print*** the document. **Once you view the document, you will not receive a mailed paper copy.**
- Students that **do not ‘view’** the current tax year document via their SIS account will receive a mailed paper copy at the end of January.

STEPS TO ACCESS “1098-T Self-Serve” through your SIS account:

- A. In the "Finance Section" on the 'home page' of your SIS student account use the drop-down arrow in the selection box and pick "View 1098-T".



- B. Click the double arrows to the right side of the selection box.



- C. First time you access the “View 1098-T” screen, you will see a screen with message stating you “*You have not consented to receive your 1098-T via on-line access*”.

Screen also has a listing of which Tax Years the document is available for you to view and print

- You need to complete the *Grant Consent* step the first time you access the 1098-T through your SIS account.
- The *Consent* step **MUST** be completed before you are able to view any 1098-T documents listed.
 - Click on the “Grant Consent” button on the ‘View 1098-T’ page.

View 1098-T


Years listed indicate which 1098-T statements are available for you to access. Please note that the Printed Date will only be visible for years you received a paper copy. Select the Tax Year hyperlink to view the 1098-T Tuition Statement. To view the details, select the Box Amount Tab. View the details by selecting the hyperlink on the Amount field.


Note:

1. If you use a pop-up blocker, you will have to disable it to display your 1098-T.
2. If there is no hyperlink for the amounts, detail information is not available. Please contact your Bursar’s office should you need more information.

1098-T Report Selection

General		Box Amount			
Tax Year	Version	Federal Tax ID	Description	Printed Date	Transmittal Date
2020	Original	██████████	UW GREEN BAY		
2019	Original	██████████	UW GREEN BAY		

 You have not consented to receive your 1098-T via on-line access. Select the Grant Consent push button to allow on-line receipt.





- D. Please review the consent Agreement that appears.

- To ‘accept’ Consent place a check (v) in the box on the left side of “Yes, I have read the agreement”:
- Click ‘Submit’ after you have checked the agreement box

1098-T Consent



1. 1098-T Consent Agreement

I agree to receive my 1098-T Tax form electronically through on-line access. Selecting the ‘Yes, I have read the agreement’ checkbox means you will no longer receive the 1098-T form via US mail. Select the Submit push button to always access your 1098-T on-line. Select the Cancel push button to return to the 1098-T Year selection.

The agreement is dated

08/17/2020

Yes, I have read the agreement

Cancel

Submit

- E. After submitting your Consent, the “1098-T Consent Confirmation” screen appears.

- Click on the “View 1098-T Selection” box which will bring up a listing of 1098-T forms available for your selection to view and print.
- Next screen will show which 1098-T documents are available for you to view and print
- Click on the Tax Year document you wish to view/print.

1098-T Consent



2. 1098-T Consent Confirmation

- ✔ You have elected to receive your 1098-T electronically instead of through the US mail. Select the View 1098-T Selection button to continue viewing your 1098-T.



View 1098-T

Years listed indicate which 1098-T statements are available for you to access. Please note that the Printed Date will only be visible for years you received a paper copy. Select the Tax Year hyperlink to view the 1098-T Tuition Statement. To view the details, select the Box Amount Tab. View the details by selecting the hyperlink on the Amount field.

Note:

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1098-T Report Selection

General		Box Amount				
Tax Year	Version	Federal Tax ID	Description	Printed Date	Transmittal Date	
2020	Original	██████████	UW GREEN BAY			
2019	Original	██████████	UW GREEN BAY			



View 1098-T

Years listed indicate which 1098-T statements are available for you to access. Please note that the Printed Date will only be visible for years you received a paper copy. Select the Tax Year hyperlink to view the 1098-T Tuition Statement. To view the details, select the Box Amount Tab. View the details by selecting the hyperlink on the Amount field.

Note:


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1098-T Report Selection

General		Box Amount				
Tax Year	Version	Federal Tax ID	Description	Printed Date	Transmittal Date	
2019	Original	██████████	UW GREEN BAY			

G. When you 'view' the 1098-T document we recommend you "Print" the document for your records upon viewing the 1098-T.

- Once you 'view' the document, you will not receive a mailed paper copy.
- To Print – click the "printer icon" in top right hand of upper toolbar.

Automatic Zoom 

<input type="checkbox"/> CORRECTED		
<small>FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number</small> UW GREEN BAY UWGB Bursar SS1300 2420 Nicolet Dr Green Bay WI 54311-7003 BURSAR'S OFFICE 920/465-2224	<small>1 Payments received for qualified tuition and related expenses</small> \$ 9010.06 <small>2</small>	<small>OMB No. 1545-1574</small> 2019 <small>Form 1098-T</small>

Tuition Statement