## Tax year 2020 1098-T IRS Document

We are happy to announce that effective with Year Ending 2020 UW Green Bay has implemented student 'self-serve' in SIS for accessing your IRS 1098-T tax document.

- The SIS 1098-T self-serve is available for Tax Year 2020 and forward.
- Please LOG INTO YOUR UW-GREEN BAY SIS account and verify your "Home" address is correct.
- As a current active student, you will have the ability to view and print your 1098-T form directly from the 'home' page of your SIS account.
- When you 'view' your 1098-T we recommend you print the document. Once you complete the consent to view your 1098-T, you will no longer receive mailed paper copies (both for current year and future years).
- Please see <a href="https://www.uwgb.edu/bursar/1098t-tax-information/">https://www.uwgb.edu/bursar/1098t-tax-information/</a> for additional information regarding the 1098-T form, and instructions on how to obtain the document for tax years prior to 2020.
- Students that **do not 'complete the consent'** to be able to 'view' the 1098-T document via their SIS account will receive a mailed paper copy at the end of January.
- Effective immediately you can follow the steps below to complete the 1098-T consent.

## STEPS TO ACCESS "1098-T Self-Serve" through your SIS account:

A. In the "Finance Section" use the drop-down arrow in selection box and pick "View 1098-T".



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

My Account	
ccount Inquiry Iake Payment or Manage F	Refunds
Financial Aid	
View Financial Aid Accept/Decline Awards	
View 1098-T	

- 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.

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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:

If you use a pop-up blocker, you will have to disable it to display your 1098-T.

If there is no hyperlink for the amounts, detail information is not available. Please contact your Bursar's office should you need more information.

1098-1	Report Selection	on			
Gene	Box Amour	nt 💷			
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		1-2	1-2		
1. 1098-T Consent Agre	ement				
I agree to receive my 1098-T Tax form agreement ' checkbox means you wi button to always access your 1098-T selection.	n electronically through o Il no longer receive the 1 on-line. Select the Cano	on-line access. Selecting the 'Yes, I have ro 1098-T form via US mail. Select the Subm cel push button to return to the 1098-T Yea	ead the it push r		
The agreement is dated	08/17/2020	Yes, I have read the agreement			
				Cancel	Submit

Grant Consent

- 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.

2. 109	8-T Conse	ent Confir	mation		
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If you have any questions about this email, please contact:

**UWGB - Bursar/Student Billing Office** 

- Phone: 920-465-2224
- Email: bursar@uwgb.edu