



Borrower/Student Site Overview

2009 Tax Year

<https://www.getmydocument.com>

Key Contacts:

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E-Services Customer Service

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Sr. Manager E-Service

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Section 1: Certificate Received

Borrowers/students that receive the certificate email will not be directed to the GetMyDocument home page; instead the hyperlink takes them directly to the login page.

A borrower/student record is uploaded and the associated 1098 entity/document is created. The borrower/student receives an email from inform@getmydocument.com or 1098@eforms.uwsa.edu (UW Schools only).

The email contains a link and the security certificate that is a required part of the authentication process. The university, last four digits of their tax ID, first, last name and the scrambled code must match the database exactly in order for system access to be granted. The participant follows the link and on-screen instructions to download/print their document.

Once the document is viewed, the manager site is updated.

Hint: Check Junk and/or Spam folder for email.

A borrower/student can receive from 1-5 email invitations to the site. The text is the same for all emails, only the subject line increases in intensity. Once a document is viewed, the borrower/student is removed from the email campaign. If the document was viewed and now is updated, a correction email is sent.

The email contains a link to the authentication page of www.getmydocument.com.

The certificate field is typically pre-populated, but if necessary, the borrower/student can type in the entire security certificate value.


To complete the authentication process, the borrower/student completes the form and consents to receiving the document electronically. All values must match our database exactly in order for them to proceed to the Inbox.



Hint: all the values they are required to enter (except SSN) are in the email they received. Encourage them to review the email for the university and first and last name spellings. If their name is incorrect, they should contact their university for 1098T documents, for 1098E document follow standard protocols for making name changes.

Step 1: Email Text

The email will be sent from inform@getmydocument.com.

Exception: UW System documents.

<input type="checkbox"/>		inform@getmydocum...	SAMPLE UNIVERSITY Form 1098E 2009 Tax Document Available
<input type="checkbox"/>		inform@getmydocum...	SAMPLE UNIVERSITY Form 1098T 2009 Tax Document Available

Reply Reply all Forward |  

SAMPLE UNIVERSITY Form 1098T 2009 Tax Document Available

From: **inform@getmydocument.com**
Sent: Tue 1/05/10 3:27 PM
To: **gmd1098@hotmail.com**

Dear ANDY A TESTMAN,

Your SAMPLE UNIVERSITY Form 1098T 2009 document is now available for viewing/downloading online.

To review and print the document, please browse to the following address:

https://www.gmddev.scholarchip.com/verify_certificate.aspx?cert=AA4B53AE01AE4F2780B7B7BCBCC941F5

All documents will be located in your Inbox.

Please note that you must view this document by Friday, January 22, 2010.

Thank you,



Customer Service
University Accounting Service, LLC
PO Box 918
Brookfield, WI 53008-0918

Phone: 800-756-4311
Fax: 262-780-7324
Email: inform@getmydocument.com

Customer Service Representatives are available Monday-Friday from 7:00 a.m. to 5:00 p.m. Central Time.

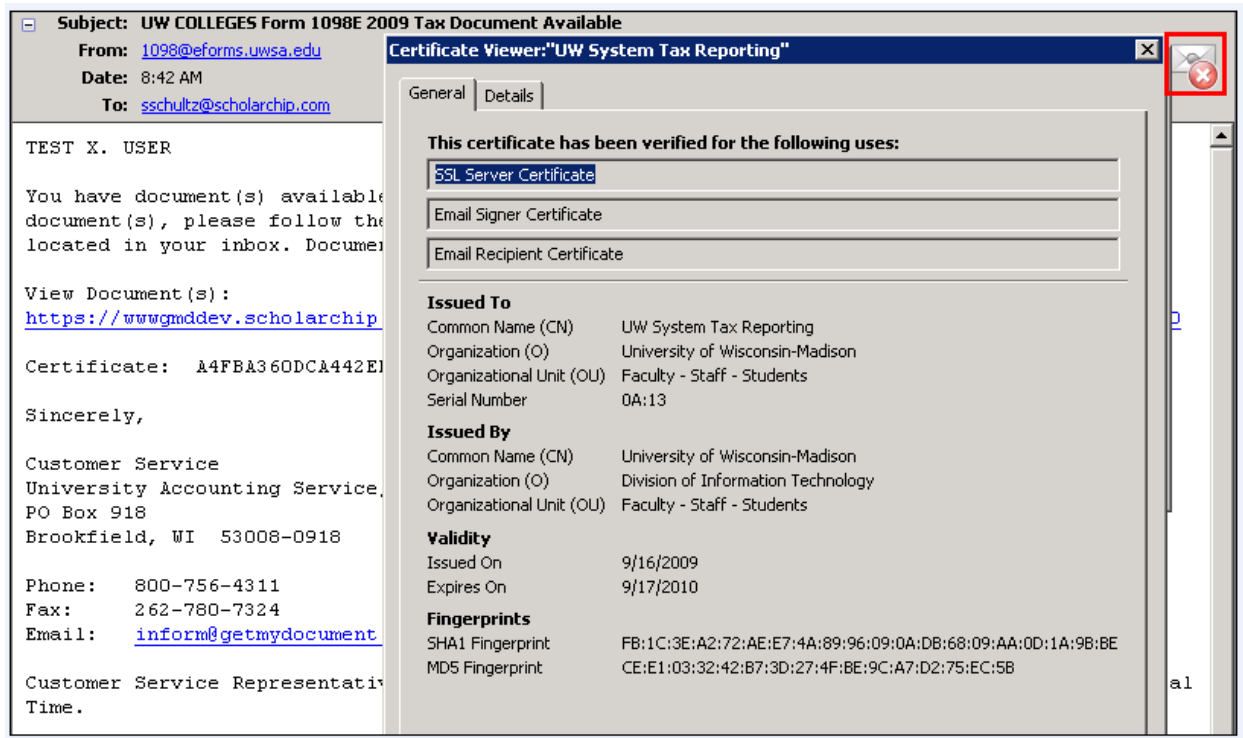
University Accounting Service, LLC provides student loan billing services for campus-based loan programs. Loans could include those from the Federal Perkins Loan, Nursing, Health Professions, Primary Care Loans, and/or Institutional loans.

Email ID: 330000487240
Account ID: 130000493421

Reply Reply all Forward | Delete |  

Step 1 continued: Email Text

UW System emails will contain a digital signature and will be from 1098@eforms.uwsa.edu. The attachment (paperclip) is the digital signature that is required by UWSA. The digital signature does not appear in Hotmail and Gmail (and maybe others) but students/borrowers for UW are directed to their campus email account where the signature does appear. Thunderbird and Outlook Express also show the attachment.



Subject: UW COLLEGES Form 1098E 2009 Tax Document Available
From: 1098@eforms.uwsa.edu
Date: 8:42 AM
To: sschultz@scholarship.com

TEST X. USER

You have document(s) available for download. Please follow the instructions located in your inbox. Documents are located in your inbox.

View Document(s):
<https://www.gmddev.scholarship.com>

Certificate: A4FBA360DCA442E1

Sincerely,

Customer Service
University Accounting Service,
PO Box 918
Brookfield, WI 53008-0918

Phone: 800-756-4311
Fax: 262-780-7324
Email: inform@getmydocument.com

Customer Service Representative
Time.

Certificate Viewer: "UW System Tax Reporting"

General | Details

This certificate has been verified for the following uses:

- SSL Server Certificate
- Email Signer Certificate
- Email Recipient Certificate

Issued To

Common Name (CN)	UW System Tax Reporting
Organization (O)	University of Wisconsin-Madison
Organizational Unit (OU)	Faculty - Staff - Students
Serial Number	0A:13

Issued By

Common Name (CN)	University of Wisconsin-Madison
Organization (O)	Division of Information Technology
Organizational Unit (OU)	Faculty - Staff - Students

Validity

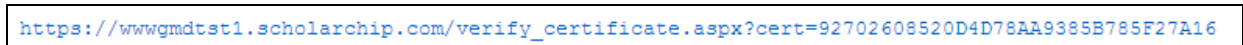
Issued On	9/16/2009
Expires On	9/17/2010

Fingerprints

SHA1 Fingerprint	FB:1C:3E:A2:72:AE:E7:4A:89:96:09:0A:DB:68:09:AA:0D:1A:9B:BE
MDS Fingerprint	CE:E1:03:32:42:B7:3D:27:4F:BE:9C:A7:D2:75:EC:5B

Step 2: Click on the link to navigate to the website. The borrower/student is directed to the verify certificate page.

The required certificate is embedded in the link. The link is unique for each document.



Step 3: Complete the authentication form and click I Consent. The certificate auto-populates, the rest of the data requires user interaction.

GetMyDocument Powered by SCHOLAR CHIP

Home Contact Us Privacy Site Managers Login

PLEASE VERIFY YOUR INFORMATION

Please Verify Your Identify By Providing Values For The Fields Below

Certificate In Email:

1098T: Select the University you most recently attended.

1098E: Select the University you received a Perkins, Health Professions, Nursing, or Institutional loan from. These loans are serviced by University Accounting Service, LLC.

Last Four Digits Of Your Tax ID Number(SSN):


First Name:
Note: If your record is not found, please try your full name or nick name.
For example: James/Jim, Michael/Mike, Patricia/Pat, etc.

Last Name:
Note: If your record is not found and your last name has recently changed, or could include a space, please enter your former name or add or remove a space/punctuation.
For example: McDonald/Mc Donald, D'Angelo/DAngelo, Van Meter/VanMeter, etc.

CONSENT AND DISCLOSURE

You are about to receive an electronic document. The law requires that we provide certain information to you and obtain your consent (agreement) to use an electronic process.

- You need certain hardware and software (including Adobe Acrobat Reader version 7.0 or higher) to use this electronic process.
- You may choose to receive a paper version of the document. If you want to receive a paper version, exit this site now. A hardcopy version of the document will be sent to you.
- You may change your mind about using an electronic process at any time up until you view your document. If you leave the site without viewing your document, a paper copy will be sent to you.
- You may withdraw your consent to use an electronic process by leaving this site before you view your document. If you leave the site before viewing your document, a paper copy of the document will be sent to you.
- Your agreement to use an electronic process applies to all documents on this site. You can obtain a paper copy of any document you view by printing it from your computer, or you may ask us to send you copy at no cost.
- IRS Forms 1098-E and 1098-T will no longer be provided if the forms are not appropriate to your situation or if your school does not contract with UAS to provide the service.



Security Code:

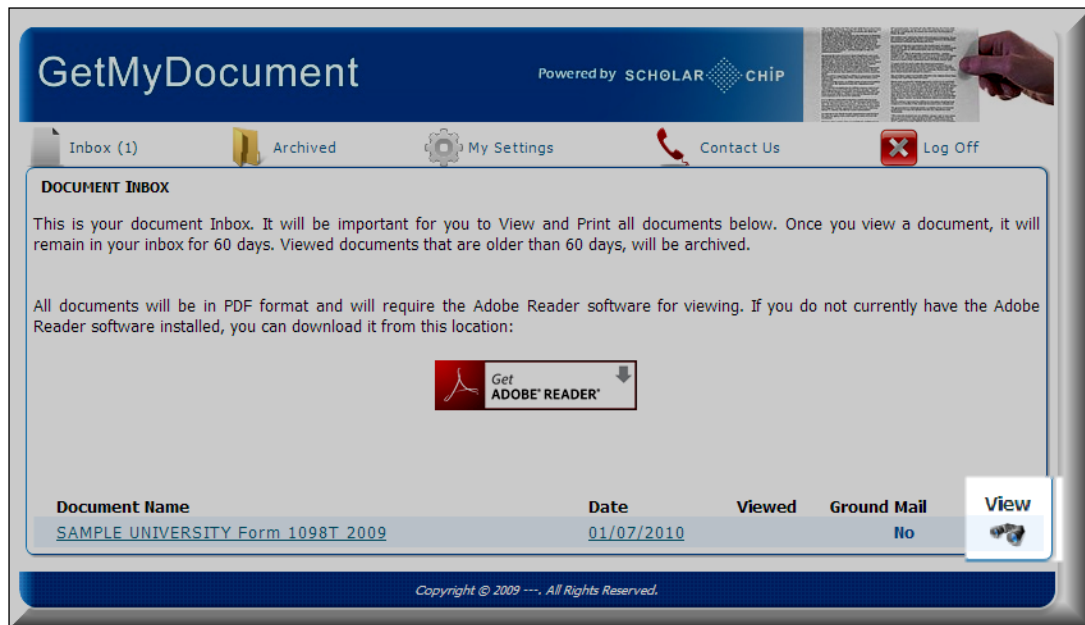
By clicking the button below, I agree to use an electronic process to retrieve my documents, described by the above disclosure.

Copyright © 2009 ---. All Rights Reserved.

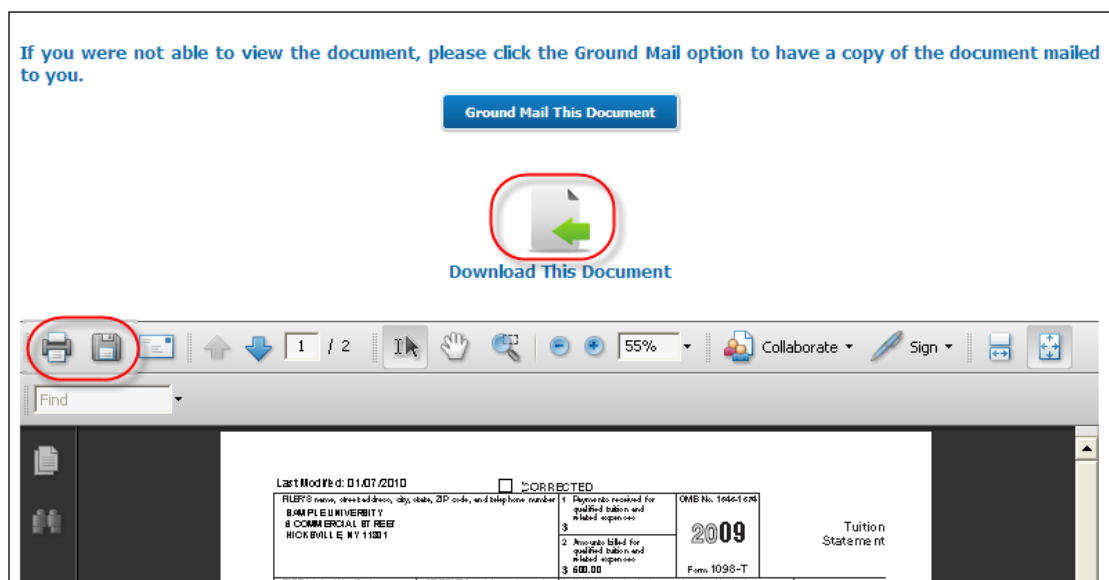
Step 4: Document Inbox—Save and/or Print

All available documents are listed, *click the View icon* to view and download the document.

Borrower/student can retrieve all documents from multiple universities during this single session.

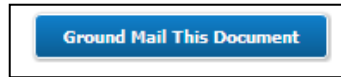



Click the Download This Document ICON to save the document locally. The print and save ICONS shown on the PDF preview menu are also an option for saving and printing the document.



Step 5: Ground Mail Option

If the borrower/student clicks on Ground Mail This Document button, they will be returned to the Inbox home page. The Ground Mail is set to Yes.



Document Name	Date	Viewed	Ground Mail	View
SAMPLE UNIVERSITY Form 1098T 2009	01/07/2010		Yes	

The borrower/student can click the View icon and cancel the ground mail option at any time. Every time the Ground Mail/Cancel Ground Mail button is submitted, the Date Viewed is reset on both the borrower and manager sites.

This document has been set to be ground mailed to you. If you have successfully viewed this document and would like to cancel the ground mail, please click the cancel button below.

[Cancel Ground Mail Of This Document](#)

Step 6: Log Off



Additional Options on GetMyDocument:

1. Archived: view historical documents.
2. My Settings: manage ground mail preference, change address, change email.

GROUND MAIL

I would like all of my 2009 Tax Documents sent to me via ground mail

[Ground Mail ALL 2009 Tax Documents](#)

I would like to CANCEL the ground mailing of all of my 2009 Tax Documents

[Cancel Ground Mail of ALL 2009 Tax Documents](#)

REQUEST CHANGE OF ADDRESS

I would like to request a change of address for all of my 2009 Tax Documents

[Change Address On ALL 2009 Tax Documents](#)

REQUEST CHANGE OF EMAIL

I would like to request a change of email

[Change Email Used On ALL 2009 Tax Documents](#)

3. FAQ:

This information is provided for your convenience. For tax advice or more technical questions about how tax laws apply to you, please consult your tax adviser.

For Instructions for Form 108863, please [Click Here](#)

Have questions? Click one the questions below to reveal the answer

- [Are there any changes to the tax credits for college expenses?](#)
- [The Hope credit originally applied only to the first two years of college. Has that changed?](#)
- [How much is the American opportunity tax credit worth?](#)
- [What education expenses qualify for the American opportunity tax credit?](#)
- [Does an expenditure for a computer qualify for the American opportunity tax credit?](#)
- [How is the American opportunity tax credit calculated?](#)
- [How will the American opportunity tax credit affect my income tax return?](#)
- [Who is eligible for the American opportunity tax credit?](#)
- [What is 'modified adjusted gross income' for the purposes of the American opportunity tax credit?](#)
- [How is the credit claimed?](#)
- [I'm just beginning college this year. Can I claim the American opportunity tax credit for all four years I pay tuition?](#)
- [Can I also claim the tuition and fees tax deduction in addition to claiming the American opportunity tax credit?](#)
- [Is there a new benefit that applies to college savings plans \(commonly known as 529 Plans\)?](#)

Answer:
The American opportunity tax credit, which expanded and renamed the already-existing Hope credit, can be claimed for tuition and certain fees you pay for higher education in 2009 and 2010.

4. Contact Us

Our goal is to provide assistance and information when it is needed.

Please use this form to inquire about any aspect of the GetMyDocument web site.

Customer Service may also be reached at 800-756-4311.

Representatives are available Monday - Friday, 7 a.m. to 5 p.m. Central Time.

Topic

University

First Name

Last Name

Account Number

Email Address

Comments