



# GetMyDocument

Account Management

Update Address

Email Resend

Document Corrections

Mark as Viewed

2011 Tax Year

Please note that screen shots are from a previous year.

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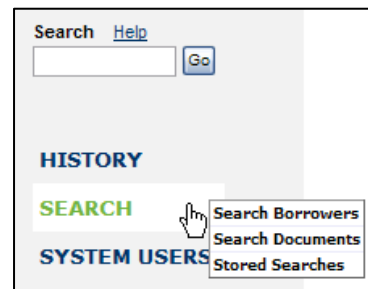
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## Address Updates

To maintain the integrity of every data upload the Borrower entity address is NOT used for ground mail. The address has been removed from the Borrower entity display.

Instead the address in the upload record is attached to each 1098 Document and used as the mailing address. To update the document address you must update the 1098 Entity.

1. Locate the borrower/student by using the Search Box or the Search Borrowers form. (left side menu)
2. Open the (Borrower) 1098 Data View .
3. Click on the appropriate System ID.



Borrower	Administrative Options	Data Views	Shortcuts
System ID 210000000080	Full Name ANDY A. TESTMAN Date Of Birth	SSN XXX-XX-8881 Borrower ID 456544444DERS	
<b>Menu</b> <span style="float: right;">1098Ts</span>			
System ID 130000000068	University Campus SAMPLE UNIVERSITY: MAIN (000169)	Name Form 1098T 2009	Category Form 1098T 2009 Modified By susiesample Last Modified 12/6/2009 2:20:00 PM

4. From the Administrative Options Menu choose: Edit 1098

1098T	Administrative Options	Data Views	Shortcuts
System ID 130000000068	<ul style="list-style-type: none"> <li>Copy 1098T</li> <li>Ur Edit 1098T</li> <li>SA Delete 1098T</li> <li>Lock 1098T</li> <li>Hide 1098T</li> </ul>	Category Form 1098T 2009	Description SAMPLE UNIVERSITY Form 1098T 2009

5. Make the necessary corrections and click

<b>Address Line 2</b>	<input type="text" value="APT 2"/>
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6. The PDF is regenerated and a History entry is made.  
 Open the 1098 History DataView to see data before the changes.  
 Open the 1098 Documents DataView to view the document.

NEW: A PDF is not created each time a change is made. The template is dynamic and a single document is regenerated. To view the historical information, click on the History System ID.

Borrower		Administrative Options		Data Views		Shortcuts	
System ID 210000000080	Full Name ANDY A. TESTMAN Date Of Birth	SSN XXX - XX - 6801 Borrower ID 458544444DERS					
1098T		Administrative Options		Data Views		Shortcuts	
System ID 130000000068	University Campus SAMPLE UNIVERSITY, MAIN (000169)	Category Form 1098T 2009	Description SAMPLE UNIVERSITY Form 1098T 2009	Modified By lyrtal	Last Modified 12/7/2009 10:04:34 PM		
Menu							
Documents							
System ID	University Campus	Name	Extension	Category	Modified By	Last Modified	Viewed
130000000228 <a href="#">(View)</a>	SAMPLE UNIVERSITY, MAIN (000169)	SAMPLE UNIVERSITY Form 1098T 2009	.pdf	Form 1098T 2009	susiesample	12/6/2009 2:20:01 PM	
1098T History							
Modification Date					Modified By		
12/06/2009 02:20:00 PM					susiesample		

## Email Updates

Like address changes, email addresses must be changed at the 1098 entity.

1. Go to the 1098 entity and choose Edit 1098 from the Administrative Options menu.
2. Enter the updated information and click Submit.
3. When the next email campaign is processed, the email notice will be sent to the email address shown in the most current 1098 entity.
4. To send an email immediately, check the Send Email box at the bottom of the form.

## Email Resend

You can resend the document notice email from the Email entity.

Registration is not required. Borrowers/students will be required to enter a certificate number in order to retrieve their document. The certificate is found in the 1098 Information DataView.

1. From the Borrower entity, open the Emails data view.

Borrower		Administrative Options		Data Views	Shortcuts
System ID	Full Name	SSN	Address	Default Data Views	Primary Email Address
210000321795	JOHN SAMPLE	101 - 04 - 4446	PO BOX 932	Address Changes	KATHY.ANDERSON@NCOGROUP.COM
	Date Of Birth	Borrower ID	BROOKFIELD	Addresses	
	01/01/1970	5551212	53008	Custom Objects	
				Documents	
				Document History	
				Email Addresses	
				Documen	
				Emails	

2. Select the System ID of the 1098 email you would like to resend.

Menu		Emails				
System ID	Email	Task	Created By	Date Sent	University	Entity Status
330001119843	sschultz@scholarchip.com	CustomObject; Form 2008 1098T; Initial Email	system	12/30/2008 8:51:13 PM	SAMPLE UNIVERSITY-2 (000769)	Sent
330001344781	KATHY.ANDERSON@NCOGROUP.COM	Account Activation	210000321795	12/29/2008 4:42:32 PM		Sent

3. From Administrative Options click Resend Email. The Date Sent is updated with the new date and time of the "send".

Email		Administrative Options	Data Views	Shortcuts	
System ID	Task	Copy Email	Email Address	Status	Date Sent
330001119843	CustomObject; Form 2008 1098T; Initial Email	Resend Email	sschultz@scholarchip.com	Sent	12/30/2008 8:51:13 PM

## Document Corrections

If the borrower/student has viewed a document and subsequent changes are made to the 1098, then the 1098 should be marked as corrected.

All updates are entered on the 1098 Entity. From Administrative Options, click Edit 1098.

Like Address Changes, enter the new data and click Submit.

A new History entry is made and the PDF is regenerated.

1098T		Administrative Options	Data Views	Shortcuts		
System ID 130000000068	University Campus SAMPLE UNIVERSITY-MAIN (000169)	Category Form 1098T 2009	Description SAMPLE UNIVERSITY Form 1098T 2009	Modified By lyetal	Last Modified 12/7/2009 10:23:10 PM	
<b>Menu</b>						
<b>Documents</b>						
System ID	University Campus	Name	Extension	Category	Modified By	Last Modified
310000000229 <a href="#">(View)</a>	SAMPLE UNIVERSITY-MAIN (000169)	SAMPLE UNIVERSITY Form 1098T 2009	.pdf	Form 1098T 2009	lyetal	12/7/2009 10:19:27 PM
<b>1098T History</b>						
Modification Date				Modified By		
12/07/2009 10:04:34 PM				lyetal		
12/06/2009 02:20:00 PM				susesamole		

**IMPORTANT:** If the document had been previously viewed, you must mark it as Unviewed.

Click on the Document System ID.

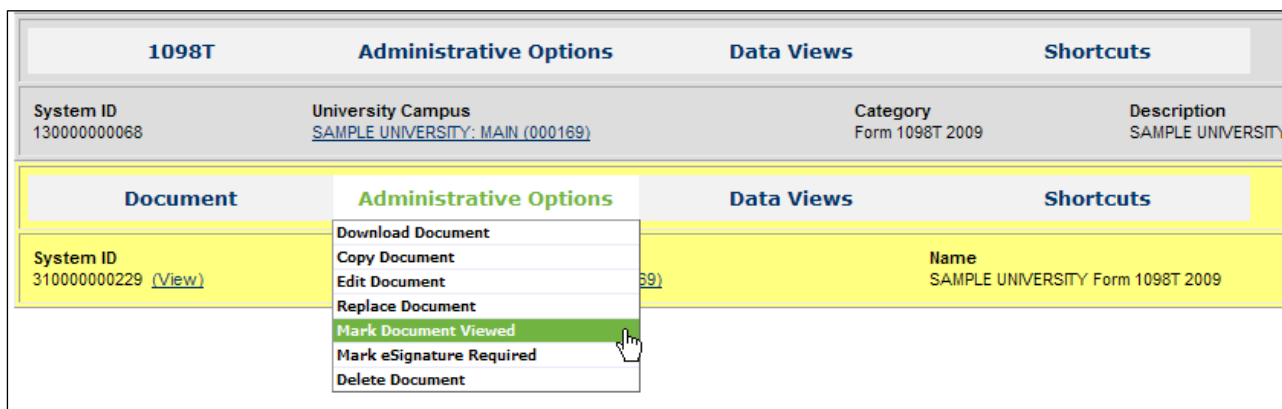
From Administrative Options, Click Mark Document Not Viewed.

Document	Administrative Options	Data Views
System ID 310000000229 <a href="#">(View)</a>	<ul style="list-style-type: none"> <li>Download Document</li> <li>Copy Document</li> <li>Edit Document</li> <li>Replace Document</li> <li style="background-color: #d3d3d3;">Mark Document Not Viewed</li> <li>Mark eSignature Required</li> <li>Delete Document</li> </ul>	

## Mark as Viewed

When a document is printed locally it should be marked as viewed. This prevents a second document from being sent by ground mail.

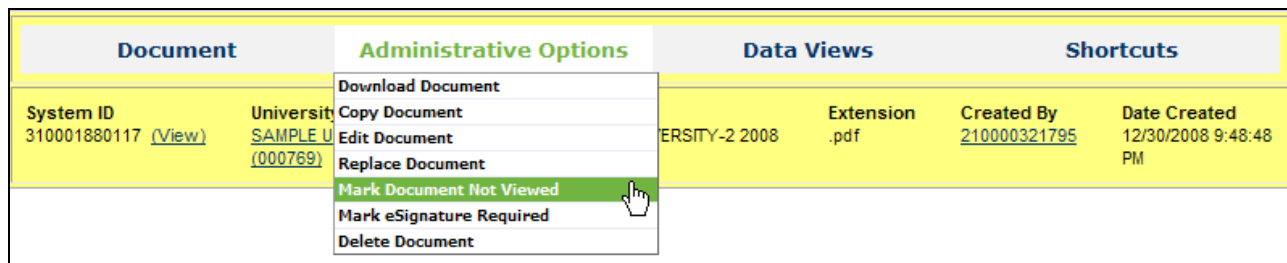
1. Click on the Document System ID.
2. From the Document Administrative Options menu, click Mark Document Viewed.



3. The Document Information Data View will update the Last Modified Date and Modified By.

Created By	<a href="#">susiesample</a>
Date Created	12/6/2009 2:20:01 PM
Modified By	<a href="#">lvertal</a>
Last Modified	12/7/2009 10:27:10 PM
Template ID	<a href="#">310000000081</a>

4. If you marked a document as viewed in error simply return to the Document Administrative Options and choose Mark Document Not Viewed.



## BORROWER/STUDENT DOCUMENT RETRIEVAL

Registration is not required.

Authentication is based on 1098 Certificate, Last 4 digits of SSN/TIN, First Name, Last Name, and on screen security code.

The borrower/student will click I Agree to retrieve the document electronically to satisfy the eSignature Act requirements.

The certificate is part of the 1098 Entity. Every 1098 has a certificate number and is sent in the email notification.

<b><u>1098T Information</u></b>	
<b>System ID</b>	<a href="#">130000000068</a>
<b>University Campus</b>	<a href="#">SAMPLE UNIVERSITY: MAIN (000169)</a>
<b>Name</b>	Form 1098T 2009
<b>Description</b>	SAMPLE UNIVERSITY Form 1098T 2009
<b>Category</b>	Form 1098T 2009
<b>Certificate</b>	828F6A57BB9147838394FCCD8A45D993

## GetMyDocument Summary

1. All address and email updates must be made at the 1098 entity level.
2. Emails will be sent from the uwsa.edu address.
3. A University Association must be made before you can add a 1098 entity for the same SSN but different name.
4. If you print a document locally for a borrower/student, mark the document as viewed.
5. If you edit a viewed document, mark the document as not viewed.