



IRS 1098-T Updates

Financial Services
FAR Meeting
January 30, 2019
Gary K Lott
Director of Financial Services & University Bursar

Educational Tax Credits

- The IRS Form 1098-T is issued to all students with qualified tuition and fees paid during the calendar year.

8383		<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED	
FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses \$	OMB No. 1545-1574 2019 Form 1098-T
FILER'S employer identification no.	STUDENT'S TIN <input type="checkbox"/>	2	Tuition Statement Copy A For Internal Revenue Service Center File with Form 1096. For Privacy Act and Paperwork Reduction Act Notice, see the 2019 General Instructions for Certain Information Returns.
STUDENT'S name		3	
Street address (including apt. no.)		4 Adjustments made for a prior year \$	
City or town, state or province, country, and ZIP or foreign postal code		5 Scholarships or grants \$	
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student <input type="checkbox"/>	6 Adjustments to scholarships or grants for a prior year \$	
		7 Check this box if the amount in box 1 includes amounts for an academic period beginning January—March 2020 <input type="checkbox"/>	
		9 Check if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$

Form **1098-T** Cat. No. 25087J www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service

The Taxpayer Relief Act of 1997 allows certain taxpayers who pay qualified tuition and fees to claim the Hope Scholarship Credit or the Lifetime Learning Credit against their federal income tax liability. The American Opportunity Tax Credit (AOC) modified the existing Hope Credit and was made permanent with the FY16 Omnibus Spending Bill.

▪ **AOC**

- Maximum is \$2,500 per student
- Can be claimed for the first four years of post-secondary education
- Generally, 40% of the AOC is refundable credit for most taxpayers
 - You can receive up to \$1,000 even if you owe no taxes

▪ **Lifetime Learning Credit**

- Available for qualified tuition and fees
- No restrictions regarding minimum enrollment or academic classification,
- Limited to 20% of the first \$10,000 per taxpayer



UTSA Automated Student Access Program (ASAP)



Automated Student Access Program

The University of Texas at San Antonio

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Fiscal Services

Please note that credit cards are not accepted at either of the Fiscal Services offices, but click on the RowdyPay link below to make a credit card payment with Visa, MasterCard, Discover or American Express OR an electronic check payment from your bank account. Students will be charged a non-refundable 2.25% credit card expense charge for using a credit card, but if you make your payment with electronic check, there is no fee.

⚠ Looking for "Parking" or "UTSACard"?
You can find these links under the Student Services tab or menu.

Due to Census Day Processing, RowdyPay will not be available from 6pm to 9pm on May 10, 2018.



By clicking on RowdyPay above you can -

- View account balance
- Make Credit Card or eCheck payments for Tuition and Fees, Housing, and Meal Charges
- Setup installment plan
- View account activity
- View and print statements

Pay UTSA Housing Deposit with Electronic Check

Use this link to pay your Housing Deposit with an Electronic Check. For CV, LV, SSH housing only.

Select Tax Year

Tax Notification

Tuition and Fee Loan Application - eSignature

Please select this link to apply for a tuition and fee loan on the web.

Link to Heartland ECSI Education Tax Credit Statements

View and print IRS 1098-T form

Direct Deposit

Authorization Agreement for Student Refunds

Financial Services / Fiscal Services Comment Card

Please take a minute to complete the customer service comment card.

[No Title]



UTSA Automated Student Access Program (ASAP)

UTSA ASAP
Automated Student Access Program
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Tax Notification 2018

This is the information which has been, or will be, reported to the IRS on Form 1098-T. If you believe that information is incorrect, please contact the Fiscal Services Office immediately. You can update address and/or taxpayer information on the Student Tax Information page.

A representation of the Tuition Statement form 1098-T is shown below. This important tax information will be sent to you and furnished to the Internal Revenue Service. Select links on the reported amounts to review the associated detail.

Sample Form 1098-T (do not use for IRS reporting)

FILER's name, address, and contact phone number University of Texas at San Antonio One UTSA Circle San Antonio, TX 78249 United States of America Contact: (210) 458-4221 ECSI: (866) 428-1098		1 Payments Received 234.51	2018
		2 Amounts Billed for qualified tuition and related expenses	
FILER's Federal Id 741717115	Student SSN *****	3 Check if reporting method has changed for 2018 <input checked="" type="checkbox"/> [X]	
STUDENT's name, street Maricela 8318 Timber Bough St San Antonio, TX 78250-4436		4 Adjustments	5 Scholarships or Grants
Service Provider/Acct. No. (opt)		6 Adjustments to Scholarships	7 Check if box 1 includes amounts for academic period beginning January - March 2019 <input type="checkbox"/> []
8 Check if at least half time student <input checked="" type="checkbox"/> [X]	9 Check if a graduate student <input checked="" type="checkbox"/> [X]	10 Reimbursements from insurance contract	

Select links on the Tax Report Descriptions below to see additional detail which may be helpful in determining the amount to claim for Hope Scholarship or Lifetime Learning Credit.

Heartland ECSI

ECSI SERVICE NEVER RESTS

View Tax Statements

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number University of Texas- San Antonio One UTSA Circle San Antonio TX 78249 Contact: 210-458-4221 ECSI: 866-428-1098		1 Payments received for qualified tuition and related expenses \$376.62	OMB No. 1545-1574 2018 Form 1098-T	Tuition Statement
FILER'S federal identification no. 74-1717115	STUDENT'S taxpayer identification no. [REDACTED]	3 If this box is checked, your educational institution has changed its reporting method for 2018 <input checked="" type="checkbox"/>		Copy B For Student This is important tax information and is being furnished to the Internal Revenue Service. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return.
STUDENT'S name, street address, city, state, and ZIP code MARICELA A. [REDACTED] 8318 TIMBER BOUGH ST SAN ANTONIO TX 78250-4436		4 Adjustments made for a prior year	5 Scholarships or grants	
Service Provider (Acct No. (see instr.)) [REDACTED]		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2019 <input type="checkbox"/>	
		8 Checked if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input checked="" type="checkbox"/>	10 inc. contract reimb./refund

Form **1098-T** (keep for your records) www.irs.gov/1098t Department of the Treasury-Internal Revenue Service

If you have any general questions, please visit <http://www.ecsi.net/taxinfo.html> for information regarding your tax documents and to obtain contact information for ECSI. If you have any questions regarding the financial information on your 1098-T, please contact your school directly.

Neither your school nor ECSI can answer tax questions or provide tax advice, you must contact your tax professional.

Transaction History				Transaction History			
Trans Date	Box #	Trans Description	Trans Amt	Trans Date	Box #	Trans Description	Trans Amt

For a complete listing of your student account transactions, please access your student account online through the student portal provided by your institution.

QUESTIONS



UTSA[®]
Office of
Financial Affairs

Thank you!

utsa.edu/financialaffairs

Your Partner for Successful Solutions