

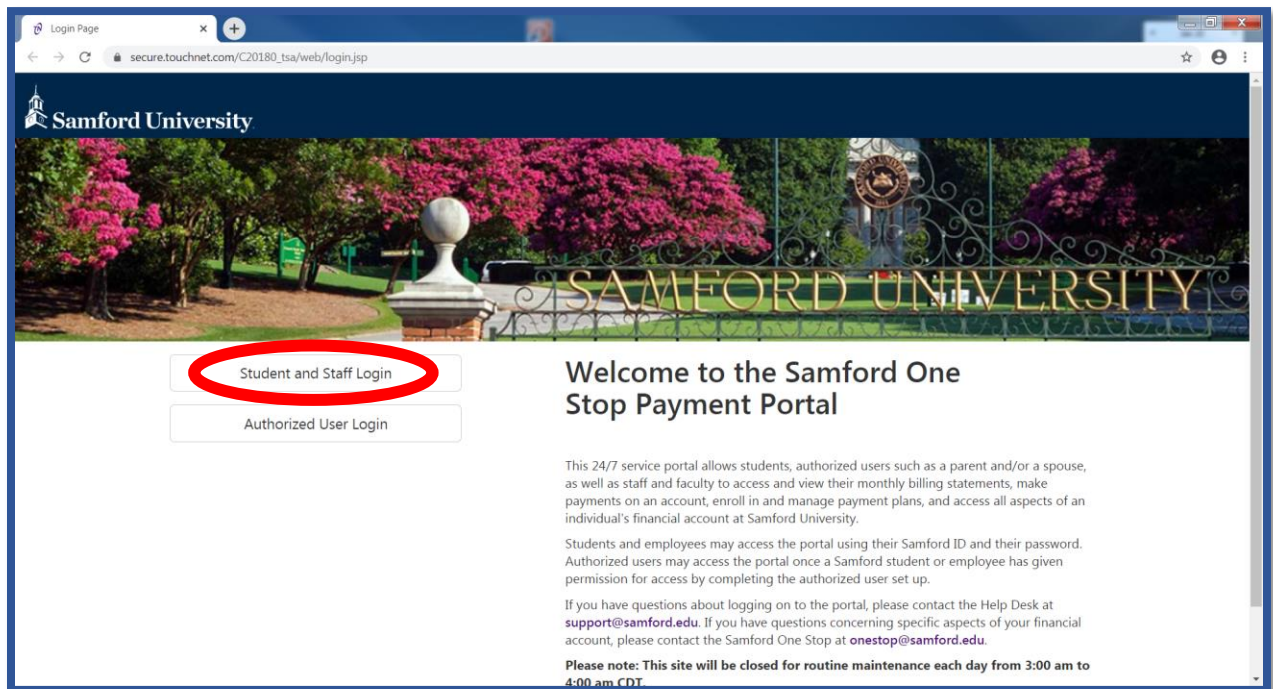
## **Important information related to 1098-T's.**

- **1098-Ts for tax year 2020 have been mailed out to the students address in the Banner system. They were mailed out by our service provider – Heartland ECSI.**
- **The Heartland ECSI 1098-T helpline number is **866-428-1098**.**
- **1098-T's are based off of the tax year (January 1<sup>st</sup> through December 31<sup>st</sup>).**
- **1098-T's are not based off of the academic year (July 1<sup>st</sup> through June 30<sup>th</sup>).**

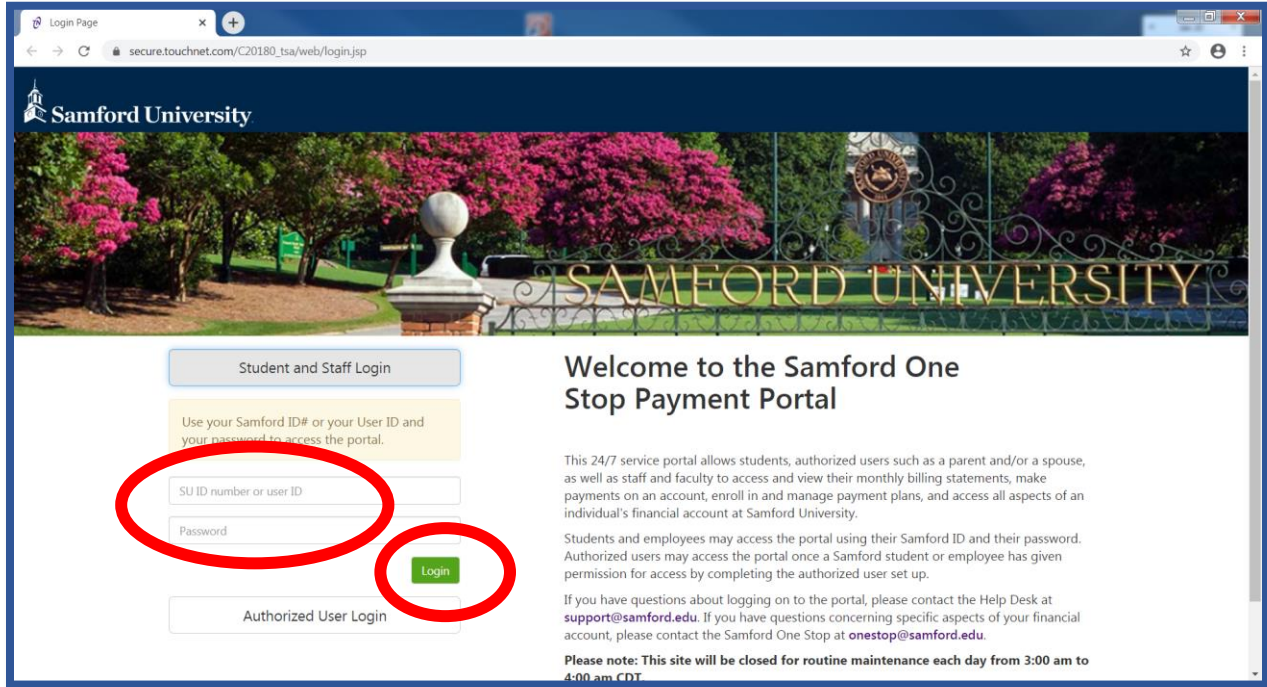
**1098-T's can be electronically accessed through the Samford One Stop Payment Portal by following this link [www.samford.edu/go/ebill](http://www.samford.edu/go/ebill) .**

**Once you are on the Samford One Stop Payment Portal, please go through the following steps to retrieve your 1098-T electronically.**

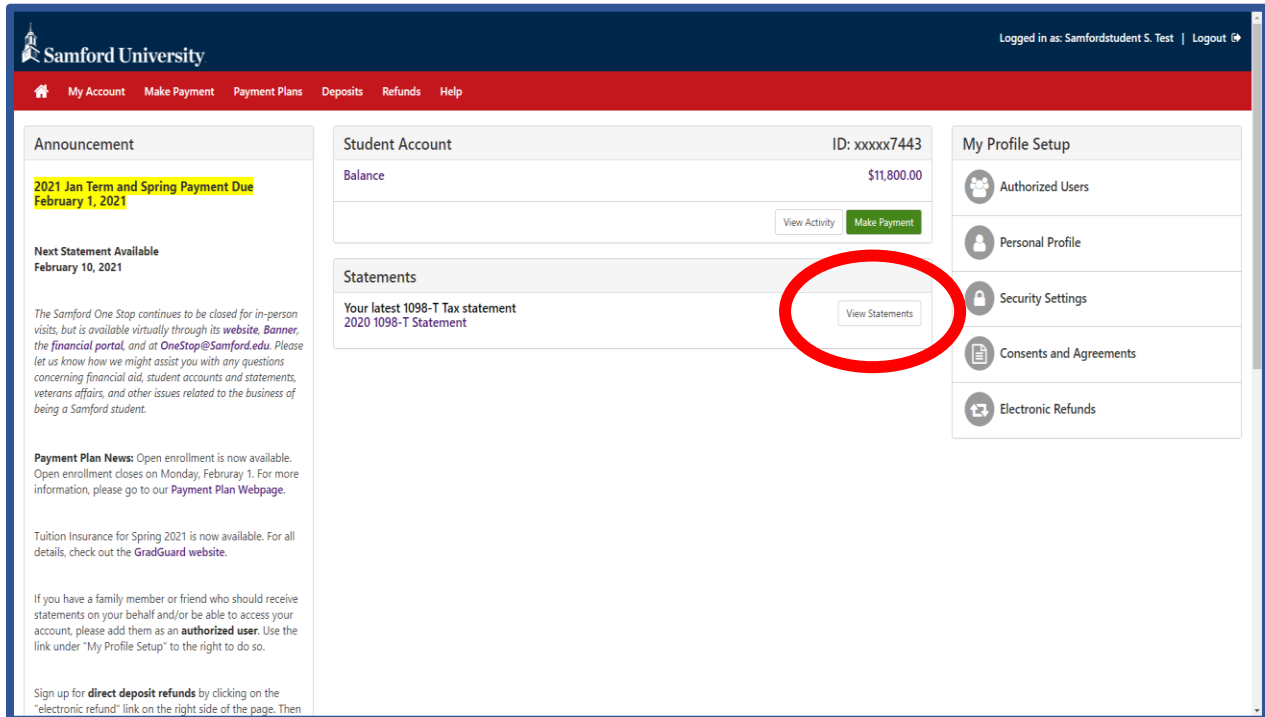
### **Step 1 – Select *Student and Staff Login*.**



**Step 2 – Enter your Samford Student ID number or User ID along with your Password, then select Login.**



**Step 3 – Select View Statements.**



#### **Step 4 – Select *View* under Action.**

The screenshot shows the Samford University portal interface. At the top, there is a navigation bar with the university logo and the text "Samford University". To the right of the logo, it says "Logged in as: Samfordstudent S. Test | Logout". Below the navigation bar, there are several menu items: "My Account", "Make Payment", "Payment Plans", "Deposits", "Refunds", and "Help". On the far right of this bar is "My Profile". The main content area is titled "Statements" and has two tabs: "Billing Statements" and "1098-T Tax Statements". Under the "1098-T Tax Statements" tab, there is a table titled "1098-T Tax Statement". The table has two columns: "Tax Year" and "Action". The "Tax Year" column lists "2020" and "2019". The "Action" column has a "View" button for each year. The "View" button for the year "2020" is circled in red.

#### **Step 5 – Select the desired tax year and then *View*.**

The screenshot shows the ECSI portal interface. At the top, there is a header with the ECSI logo and the text "SERVICE NEVER RESTS". Below the header, there is a message box that says: "All tax documents will be available and mailed by January 31st. Please allow one week for delivery. If you have specific questions about why your institution reports in Box 1 or Box 2 please visit <http://www.ecsi.net/taxSelect/student.html> for more information." Below the message box, there is a warning: "\*\*Please keep in mind ECSI cannot offer tax advice, please consult your tax professional.\*\*". Below the warning, there is a section titled "Please view the tax documents available for your account." Below this section, there is a "View" button and a "Year Type" dropdown menu. The "Year Type" dropdown menu is open, showing a list of options: "2020 1098-T", "2019 1098-T", "2015 1098-T", and "2014 1098-T". The "2020 1098-T" option is selected and circled in red. Below the dropdown menu, there is a "Close Window" button and an "Enter code" input field. At the bottom left, there is a footer with the text: "Copyright 1997-2021, ECSI. Page: bcp04.exe (Ver: 02.01.48) Last Modified: 10/13/2017". At the bottom right, there is a "Live Chat" button.

The desired 1098-T will then be displayed as shown below.

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number <b>Samford University</b> <b>800 Lakeshore Drive</b> <b>Birmingham AL 35229</b>  Contact: (205) 726-2816 ECSI: 866-428-1098		1 Payments received for qualified tuition and related expenses <b>\$22,324.00</b>  2	OMB No. 1545-1574  <b>2020</b>  Form 1098-T	<b>Tuition Statement</b>
FILER'S federal identification no. *	STUDENT'S TIN <b>*****2222</b>	3	<b>Copy B For Student</b>  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 <b>SAMFORDSTUDENT TEST</b> <b>800 LAKESHORE DRIVE</b> <b>BIRMINGHAM AL 35209-6715</b>		4 Adjustments made for a prior year	5 Scholarships or grants <b>\$22,324.00</b>	
		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January - March 2021 [ ]	
Service Provider/Acct No. (see instr.) <b>207536</b>	8 Checked if at least half-time student [X]	9 Checked if a graduate student [ ]	10 Ins. contract reimb./refund	

Form **1098-T** (keep for your records) [www.irs.gov/1098t](http://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.

**If you have any questions, please visit <http://www.ecsi.net/taxinfo.html> for more information.**

You, or the person who can claim you as a dependent, may be able to claim an education credit on Form 1040 or 1040-SR. This statement has been furnished to you by an eligible educational institution in which you are enrolled, or by an insurer who makes reimbursements or refunds of qualified tuition and related expenses to you. This statement is required to support any claim for an education credit. Retain this statement for your records. To see if you qualify for a credit, and for help in calculating the amount of your credit, see Pub. 970, Form 8863, and the Instructions for Forms 1040 and 1040-SR.

Your institution must include its name, address, and information contact telephone number on this statement. It may also include contact information for a service provider. Although the filer or the service provider may be able to answer certain questions about the statement, do not contact the filer or the service provider for explanations of the requirements for (and how to figure) any education credit that you may claim.

**Student's taxpayer identification number (TIN).** For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS. **Caution:** If your TIN is not shown in this box, your school was not able to provide it. Contact your school if you have questions.

**Account number.** May show an account or other unique number the filer assigned to distinguish your account.

**Box 1.** Shows the total payments received by an eligible educational institution in 2020 from any source for qualified tuition and related expenses less any reimbursements or refunds made during 2020 that relate to those payments received during 2020.

**Box 2.** Reserved.

**Box 3.** Reserved.

**Box 4.** Shows any adjustment made by an eligible educational institution for a prior year for qualified tuition and related expenses that were reported on a prior year Form 1098-T. This amount may reduce any allowable education credit that you claimed for the prior year (may result in an increase in tax liability for the year of the refund). See "recapture" in the index to Pub. 970 to report a reduction in your education credit or tuition and fees deduction.

**Box 5.** Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of the education credit you claim for the year.

**Tip.** You may be able to increase the combined value of an education credit and certain educational assistance (including Pell Grants) if the student includes some or all of the educational assistance in income in the year it is received. For details, see Pub. 970.

**Box 6.** Shows adjustments to scholarships or grants for a prior year. This amount may affect the amount of any allowable tuition and fees deduction or education credit that you claimed for the prior year. You may have to file an amended income tax return (Form 1040X) for the prior year.

**Box 7.** Shows whether the amount in box 1 includes amounts for an academic period beginning January-March 2021. See Pub. 970 for how to report these amounts.

**Box 8.** Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution.

**Box 9.** Shows whether you are considered to be enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level educational credential.

**Box 10.** Shows the total amount of reimbursements or refunds of qualified tuition and related expenses made by an insurer. The amount of reimbursements or refunds for the calendar year may reduce the amount of any education credit you can claim for the year (may result in an increase in tax liability for the year of the refund).