Important Information Related to 1098-T's.

1098-Ts are based on the tax year (January 1st through December 31st).

1098-Ts are not based on the academic year (July 1st through June 30th).

Paper 1098-Ts for current and previous years have been prepared and mailed by our service provider – Heartland ECSI. These are sent by the January 31st due date. (Heartland ECSI helpline number is 1-888-549-3274 and website is hhtps://heartland.ecsi.net).

1098-T's may be viewed electronically by responding to Samford's "Opt-In" email solicitation that is sent to all students in October and November. Then can be assessed through Samford's One Stop Payment Portal by following this link www.samford.edu/go/ebill.

You may retrieve your 1098-T statement following these steps.



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



Step 3 – Select View Statements.

Samford University						
My Account Make Payment Payment Plans	Deposits Returnos neip					
Announcement	Student Account	ID: xxxxx7443	My Profile Setup			
2021 Jan Term and Spring Payment Due	Balance	\$11,800.00	Authorized Users			
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Next Statement Available February 10, 2021	Statements					
The Samfard One Stan continues to be closed for in-nerson	Your latest 1098-T Tax statement	View Statements	Security Settings			
visits, but is available virtually through its website, Banner, the financial portal, and at OneStop@Samford.edu. Please let us know how we might assist you with any questions	2020 1098-T Statement		Consents and Agreements			
concerning tinancial aid, student accounts and statements, veterans affairs, and other issues related to the business of being a Samford student.			Electronic Refunds			
Payment Plan News: Open enrollment is now available. Open enrollment closes on Monday, Februray 1. For more information, please go to our Payment Plan Webpage.						
Tuition Insurance for Spring 2021 is now available. For all details, check out the GradGuard website.						
If you have a family member or friend who should receive statements on your behalf and/or be able to access your account, please add them as an authorized user . Use the link under "My Profile Setup" to the right to do so.						
Sign up for direct deposit refunds by clicking on the "electronic refund" link on the right side of the page. Then						

<u>Step 4</u> – Select *View* under Action.

Logged in as: Samford University				
👫 My Account Make Payment	Payment Plans Deposits Refunds Help	My Profile		
	Statements Billing Statements 1098-T Tax Statements			
	1098-T Tax Statement			
	Tax Year	Action		
	2020	View		
	2019			

<u>Step 5</u> – Select the desired tax year and then *View*.

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All tax documents will be available and mailed by January 31st. Please allow one work for delowy. If you have specific questions about why your institution engregation is the st or to sy galaxee with Mit/ProvinceAndorm terms information.	
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The desired 1098-T will then be displayed as shown below.

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Torm (keep for your records) www.in.gov/1098t Department of the Treasury-Internal Revenue Service If you have any general questions, please visit http://www.eci.in.et/taxinfo.html for information regarding your tax documents and to obtain contact information or regarding your tax documents and to obtain contact information in FGSI. If you have any questions arguing the financial information or your 1098 ⁻¹ , Telese 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.eci.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 firmished to you by an eligible educational latititition in which you are enclide, or by an insurer who makes reimbursement for your record. To see if you quility for a credit. This statement is a squited to augority and claim for an elucation credit Retain this statement and one is not a defined taxino and related expenses to you. This statement is information of the regulation of the regulatin the fill on the reducation or regulation of the re	Service Provider Acct No. (see instr.) 207536	S Checked if at least hulf-time student	[X]	9 Checked if a graduate student	[]	10 hts. contract reemb./ref	band	prepare the tax return.
If you have any general questions, please visit http://www.exi.net taxinfo.html for information or QCSI. If you have any questions regarding the financial information or your 109-7, 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.exi.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 signified educational institution in which you are enrolled, or by an insure who makes reimburements or refinds of qualified tation and related expenses to you. This statement is required to support any claim for an education credit on Form 1040 are 1040-SR. This statement has been furnished to you by an signified educational institution in which you are enrolled, or by an insure who makes reimburements or refinds of qualified tation and related expenses to you. This statement is required to support any claim for an education credit. Retain this statement for your record. To see if you and 1040-SR. Your institution must include its name, address, and information contact telephone number on this statement. To not contact the filter or the service provide for explanations of the requirements for (and how to figure) any education credit that you may claim. Stocker's targetyper identifications number (TR). For your protection, this form many alwow due to the last four digits of your TDN (SDN (TDN, ATDN, or EDN). However, the size has seported your complete TDN to the IESC. Caution: If your TDN is not shown in this box, your school was not able to provide n. Contact your school if you have questions. Stocker's targetyper identifications and during 2020 that relate to those payments received during 2020. Box 1. Shows the total payments received by an eligible educational institution for a prior year for qualified tuition and related	Form 1098-T	(keep for your	r records)	www.irs.gov/1098t		Department of the Tr	easury-Inter	mal Revenue Service
Neither your school nor ECSI can answer tax questions or provide tax advice, you must contact your tax professional. Hyon have any questions, please visit http://www.eci.aetitaxinfo.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 insure who makes reinhoursements or refinds of qualified tation 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 cell, and for half in calculating the amount of your credit, see Nub 90, Form 8050, and the Instructions for Forms 1040 and 1040-SR. Your institution must include its name, address, and information contect telephone number on this statement for your ECORE. To see if you qualify for a cell, and for half or the ascripc provider may be able to answer cartain questions about the statement, do not contact the filer or the service providers provider for explanations of the requirements for (and how to figure) any education credit that you may claim. Student's taxpayer identification sumber (TEN). For your protection, this form may show only the last four digits of your TEN (SEN, HTEN, ATEN, or EEN). However, the suste has reported your complete TIN to the ERS. Cautions: If your TEN is not shown in this box, your achool was not able to provide it. Contact your school if you have questions. Account number. May show an account or other unique number the file assigned to distinguish your account. Box 1. Shows the total payments received by an eligible educational institution for a prior year for qualified tutition and related expenses less any interminurments. Box 4. Shows any adjuttment made by an eligible educational institution for a prior year for qualified tutition. The amount dy scholarships or grants for the elandary your (including	If you have any general ques information for ECSI. If you	tions, please visit http://www have any questions regarding	g the financi	cinfo.html for informatio ial information on your l	n regan 1098-T	rding your tax docum , please contact your	ents and to school direc	obtain contact tly:
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 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. 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 the total amount of reimbursements or refunds of qualified tuition and related expenses made by an insure. The amount of reimbursements or refunds for the year (may result in an increase in tax liability for the year). 	Box 3, Reserved.							
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