

Important Information Related to 1098-T's.

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

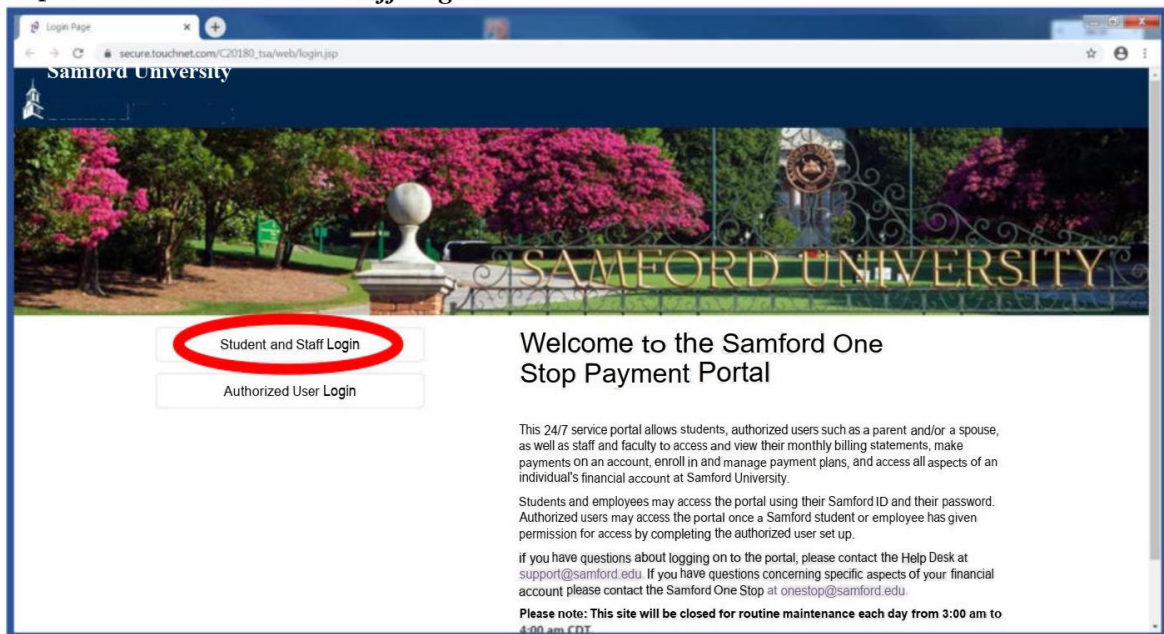
1098-Ts are not based on the academic year (July 1st through June 30th).

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 <https://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.

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*.

Samford University

Welcome to the Samford One Stop Payment Portal

This 24/7 service portal allows students, authorized users such as a parent and/or a spouse, as well as staff and faculty to access and view their monthly billing statements, make payments on an account, enroll in and manage payment plans, and access all aspects of an individual's financial account at Samford University.

Students and employees may access the portal using their Samford ID and their password. Authorized users may access the portal once a Samford student or employee has given permission for access by completing the authorized user set up.

If you have questions about logging on to the portal, please contact the Help Desk at support@samford.edu. If you have questions concerning specific aspects of your financial account, please contact the Samford One Stop at onestop@samford.edu.

Please note: This site will be closed for routine maintenance each day from 3:00 am to 4:00 am CDT.

Student and Staff Login

Use your Samford ID# or your User ID and your password to access the portal.

SU ID number or user ID

Password

Login

Authorized User Login

Step 3 – Select *View Statements*.

Samford University

Logged in as: Samfordstudent S. Test | Logout

My Account Make Payment Payment Plans Deposits Refunds Help

Announcement

2021 Jan Term and Spring Payment Due February 1, 2021

Next Statement Available February 10, 2021

The Samford One Stop continues to be closed for in-person 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 concerning financial aid, student accounts and statements, veterans affairs, and other issues related to the business of being a Samford student.

Payment Plan News: Open enrollment is now available. Open enrollment closes on Monday, February 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

Student Account ID: xxxxx7443

Balance \$11,800.00

View Activity Make Payment

Statements

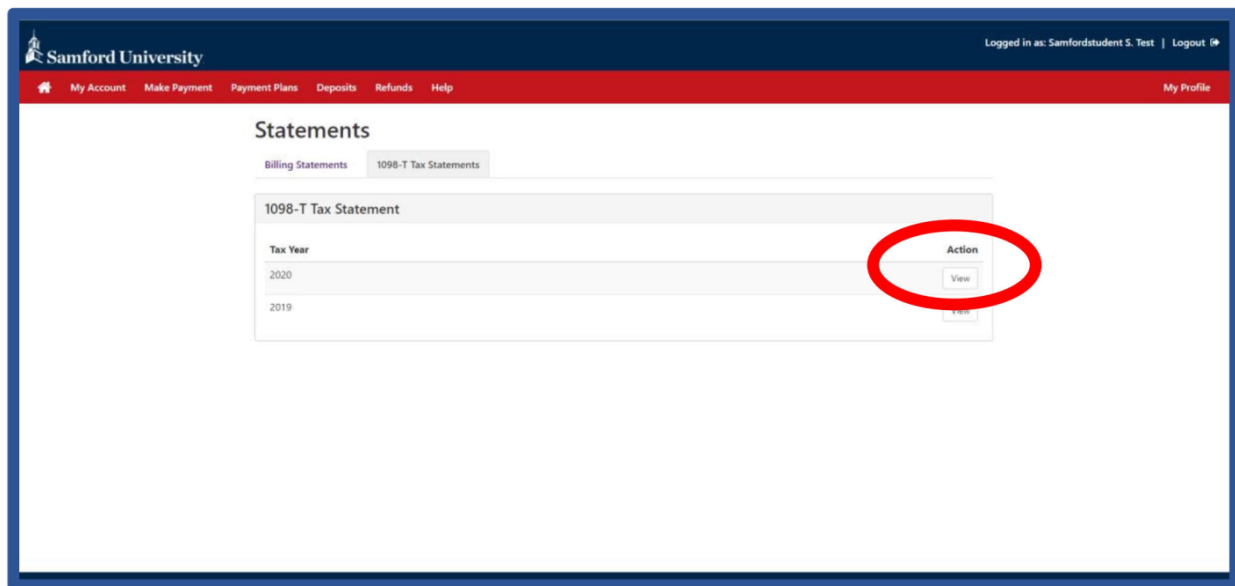
Your latest 1098-T Tax statement 2020 1098-T Statement

View Statements

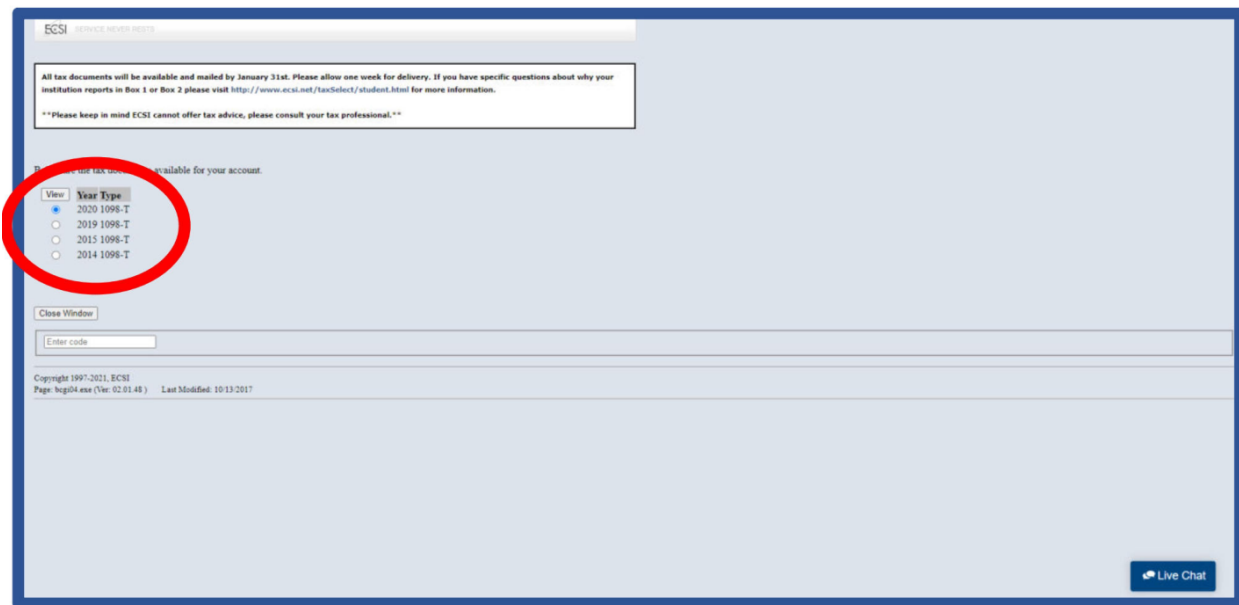
My Profile Setup

- Authorized Users
- Personal Profile
- Security Settings
- Consents and Agreements
- Electronic Refunds

Step 4 – Select *View* under Action.



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



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 Samford University 800 Lakeshore Drive Birmingham AL 35229		1 Payments received for qualified tuition and related expenses \$22,324.00	OMB No. 1545-1774 2020 Form 1098-T	Tuition Statement
Contact: (205) 726-2816 ECSI: 866-428-1098		2		
FILER'S federal identification no.	STUDENT'S TIN *****2222	3	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 SAMFORDSTUDENT TEST 800 LAKESHORE DRIVE BIRMINGHAM AL 35209-6715		4 Adjustments made for a prior year	5 Scholarships or grants \$22,324.00	
		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/Act No. (see instr.) 207536	8 Checked if at least half-time student [X]	9 Checked if a graduate student []	10 Yes, contract refund/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.				
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).				