

# Intro to Form 1098T in Self-Service Banner

## Notable 1098T Changes from 2018

- Carry-Forward Charges – these are unreported charges from 2018 that can increase the amount reported in Box 1 for 2019.
- Box 4 (Adjustments Made for a Prior Year) – this box reports any current year reductions of qualified tuition payments reported in a prior year or any reduction in charges that were reported in a prior year.
- Box 6 (Adjustments to Prior Year Scholarships or Grants) – this box reports any reduction of scholarships or grants that were reported for any prior year.

## Self-Service Banner Intro – How to get to 1098T in SSB

- Go to ULink
- Click the Tuition & Aid tab
- Click View 1098T Tax Form



A screenshot of the ULink website interface. On the left is a vertical navigation menu with the following items: Home, Employee, Purchasing &amp; Budget, Tuition &amp; Aid (highlighted in red), Time Entry, Former Student, and Tutorials &amp; Guides. The main content area is titled "TUITION &amp; AID" in red. Below this title is a breadcrumb trail: "ULink / Tuition &amp; Aid". A dark grey header bar contains the text "Tuition &amp; Statement of Account". The main content area lists three options: "View your statement or pay your bill", "View holds", and "View 1098T Tax Form". The "View 1098T Tax Form" link is circled in red. At the bottom of the main content area is another dark grey header bar with the text "Financial Aid &amp; Scholarship Info".

# SSB Intro – 1098T Display

Choose tax year at the top left.

**Tax Notification** Print Hold

Tax Year  
2019

*i* 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.

Form 1098-T ^

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number <b>Univ of Louisiana at Lafayette</b> P.O. Box 44444 Lafayette LA 70504 United States (337) 4826385		1 Payments received for qualified tuition and related expenses <b>\$16,102.48</b>	<b>2019</b>  Form <b>1098-T</b>	<b>Tuition Statement</b>	
		2 \$			
FILER'S employer identification no. <b>726000820</b>	STUDENT'S TIN [REDACTED]	3 <input type="checkbox"/>	<b>Note:</b> <b>This is an unofficial copy of the form 1098-T and is provided for information only</b>		
STUDENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code [REDACTED]		4 Adjustments made for a prior year <b>\$1,723.48</b>			5 Scholarships or grants <b>\$5,406.96</b>
		6 Adjustments to scholarships or grants for a prior year <b>\$4,048.00</b>			7 Checked if the amount in box 1 includes amounts for an academic period beginning January-March 2020 <input type="checkbox"/>
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$		

# SSB Intro – Supplemental Information

- This section is located directly under the Form 1098T display and can be accessed by scrolling down.
- Students can click the drop-down arrows on the right side to see the breakdown of each section.
- Note that the total of each section is displayed at the bottom of that section.

 Below section provides the additional detail which may be helpful in determining the amount to claim for Hope Scholarship or Lifetime Learning Credit.

## Supplemental Information

Hard Copy Sent: No

Detail of Payment Received

Detail of Adjustment to prior payments

Detail of Charges Billed

Detail of Scholarship and Grants

Detail of Adjustment to Scholarship or Grant

Box 1 Payments Reportable



# SSB Intro – Detail of Payment Received

- This section shows the breakdown of the total payments received that is used to calculate the amount reported in Box 1.

## Supplemental Information

Hard Copy Sent: No

### Detail of Payment Received

Show/Hide Columns search

Term	Detail code	Description	Amount	Pro-rata
Fall 2019	CA99	ACH - ONLINE	\$3,000.52	
Fall 2019	CC99	CREDIT CARD PYMT ONLINE	\$90.00	
Fall 2019	S002	TOPS OPPORTUNITY SCHOLARSHIP	\$2,703.48	
Summer 2019	CA99	ACH - ONLINE	\$2,790.00	
Spring 2019	CA21	ACH PYMT - PRIVATE LOAN 1	\$4,815.00	
Spring 2019	FPPEL	PELL	\$0.00	
Spring 2019	S002	TOPS OPPORTUNITY SCHOLARSHIP	\$2,703.48	
Spring 2019	S042	EDUCATE LOUISIANA	\$0.00	
<b>Total</b>			<b>\$16,102.48</b>	

# SSB Intro – Detail of Adjustments to Prior Payments

- This section shows any reduction in prior year payments or prior year charges used to calculate the amount reported in Box 4.

Detail of Adjustment to prior payments ^

Show/Hide Column

Term	Detail code	Description	Amount	Pro-rata
Fall 2018	CA99	ACH - ONLINE	\$2,299.52	
Fall 2018	FPEL	PELL	(\$3,048.00)	
Fall 2018	S042	EDUCATE LOUISIANA	(\$1,000.00)	
Total			<b>(\$1,748.48)</b>	

## SSB Intro – Detail of Charges Billed

- This detail shows the breakdown of the total charges billed that is used in the calculation of Box 1.
- This detail will usually be extensive as it lists the total of each fee for each term.
- There is a scrolling bar on the right side of the screen so that students can view each line item that makes up the total.
- The next slide shows a screenshot of this section.



# SSB Intro – Detail of Charges Billed (cont.)

Detail of Charges Billed					
Term	Detail code	Description	Amount	Pro-rata	
Fall 2019	2023	Police	\$1.00		
Fall 2019	2026	Student Health Svc - Suppl	\$5.00		
Fall 2019	2027	Transportation Services	\$50.00		
Fall 2019	2028	Recreat. Facili/Equip	\$20.00		
Fall 2019	2029	Student Union Fee New	\$25.00		
Fall 2019	2030	Art Museum	\$5.00		
Fall 2019	2031	Auxiliary Improvements	\$15.00		
Fall 2019	2032	Band Association	\$5.00		
Fall 2019	2033	Cheerleader	\$4.00		
Fall 2019	2035	Student Union Fee Supplemental	\$20.00		
Fall 2019	2036	Student Health Services	\$20.00		
Fall 2019	2037	SGA	\$7.50		
Fall 2019	2038	MAP	\$112.50		
Fall 2019	2039	Performing Arts & Music Progra	\$5.00		
Fall 2019	2040	Theater & Performing Arts	\$1.50		
Fall 2019	2041	Symphony Orchestra	\$0.50		
Fall 2019	ZU34	Lycium	\$0.61		
Summer 2019	3111	E-LEARN VUAR UNDERGRAD	\$0.00		
Summer 2019	3506	E-LEARN CRIMINAL JUSTICE	\$180.00		
Summer 2019	8005	Building Use Fee	\$10.00		
Summer 2019	8006	Building Use Fee New	\$24.00		
Summer 2019	8007	Academic Enhancement Fee	\$25.00		
Summer 2019	8008	Academic Excellence	\$60.00		
Summer 2019	8009	Operational Fee	\$30.00		
Summer 2019	8010	Student Technology Fee	\$30.00		
Summer 2019	BU01	General Fee - Undergraduate	\$91.38		
<b>Total</b>			<b>\$15,033.00</b>		

# SSB Intro – Detail of Scholarship and Grants

- This section shows a detail of the scholarships and grants received during the calendar year. This amount is reported in Box 5.

Detail of Scholarship and Grants				
Term	Detail code	Description	Amount	Pro-rata
Fall 2019	S002	TOPS OPPORTUNITY SCHOLARSHIP	\$2,703.48	
Spring 2019	FPEL	PELL	\$0.00	
Spring 2019	S002	TOPS OPPORTUNITY SCHOLARSHIP	\$2,703.48	
Spring 2019	S042	EDUCATE LOUISIANA	\$0.00	
<b>Total</b>			<b>\$5,406.96</b>	

# SSB Intro – Detail of Adjustment to Scholarship or Grant

- This section shows a detail of the reduction scholarships & grants that were reported in a prior year. This amount is reported in Box 6.

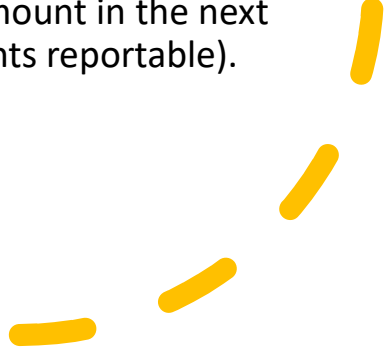
Detail of Adjustment to Scholarship or Grant					
Term	Detail code	Description	Amount	Pro-rata	
Fall 2018	FPEL	PELL	(\$3,048.00)		
Fall 2018	S042	EDUCATE LOUISIANA	(\$1,000.00)		
Total			<b>(\$4,048.00)</b>		

# SSB Intro – Box 1 Payments Reportable

- This section shows a breakdown of the amount reported in Box 1.
- See explanation of each amount on the next slide.
- Note that the calculation for each amount is explained with the letters in parenthesis.

Box 1 Payments Reportable								
<span>Show/Hide Column</span> <input type="text" value="search"/>								
Tax Year	Beginning Unreported Charges (A)	Current Charges (B)	Decrease Previous Charges (C)	Box 4 Adjustment (D)	Cap Limit Charges Billed (E=A+B+C+D)	Current Payments (F)	Box 1 Reportable (G=Least(E, F))	Ending Unreported Charges (H=E-G)
2019	0	15033		1723.48	16756.48	16102.48	16102.48	654

# SSB Intro – Box 1 Payments Reportable (cont.)

- Beginning Unreported Charges – Ending carry forward of unreported charges billed from previous tax year.
  - Current Charges – The current charges billed during the calendar year.
  - Decrease Previous Charges – The decrease of charges billed in the current tax year related to reported charges in a previous tax year.
  - Box 4 Adjustments – The adjustment calculated for Box 4.
  - Cap Limit Charges Billed – Beginning carry forward of un-reported charges billed plus current charges billed plus current decrease in previous charges plus Box 4 adjustment.
  - Current Payments – The current payments received during the calendar year.
  - Box 1 Reportable – The amount of payments received during the calendar year that is considered reportable payments of qualified tuition and related expenses.
  - Ending Unreported Charges – The carry forward amount in the next tax year (Cap limit charges billed less Box 1 payments reportable).
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# Questions

- If you have any questions regarding your 1098T, please email us at [bursar@Louisiana.edu](mailto:bursar@Louisiana.edu).