

# Tips and How-To Steps from the Bursar's Office

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## Table of Contents

1098T.....	2
Authorized User Set Up.....	2
Book Loan .....	3
Computer Loan .....	4
Fee Payment .....	4
Fee Waivers .....	5
Payment Plan .....	5
Refunds.....	6
Skyhawk Card.....	7

## 1098T

- The Federal Tax Relief Act of 1997 may provide an opportunity for tax savings through the Hope Scholarship and Lifetime Learning Tax Credit. The Hope Scholarship has a maximum tax credit which is available for students in either the first or second year of post-secondary education when the tax year begins. The student must be enrolled at least half-time and only qualified expenses incurred are eligible. The Lifetime Learning Credit is calculated on a per-family, rather than a per-student basis and has a maximum credit per year for each qualifying family.
- The 1098T form is available at the latter part of January.
- Students can either opt to receive a paper copy mailed to their permanent address or a paperless copy.
  - **My UTMartin enter username and password**
  - **Click on “Banner” tab**
  - **Click on “Personal” tab**
  - **Click “Payments and Deposits”**
  - **Click on “Click here for Online Payments/E-Bills”**
  - **Click “Agreements” under the “My Account” tab**
  - **Your current selection will appear**
  - **Click “Change” to change from paperless or paper 1098T**
- The 1098-T form will only state the amount billed to the student for qualified tuition and related expenses for the *calendar year*. The total of all scholarship and/or grants administered and processed by the University of Tennessee @ Martin.
- For tax advice, please consult with your tax advisor, a CPA, or the IRS.

## Authorized User Set Up

- Students can set up an authorized user so that person can view the student account, make payments and/or deposits, view current billing statements.
- Students will follow the following steps to set up an authorized user

- **Under My UTMartin, enter your username and password**
- **Click on “Banner” tab**
- **Click on “Personal” tab**
- **Click on “Payments and Deposits”**
- **Click on “Click here for Online Payments/E-Bills”**
- **Under “My Account” click on “Authorized Users”**
- **Enter the email address of the authorized user and select what you would like the user to have access to.**
- **Click “Continue”**
- **Check the “I Agree” checkbox and press “Continue”**
  - An email is sent the provided email with instructions on how to log in and view your account.
  - The authorized user with login using the email address you provided.

## Book Loan

- Students who have financial aid in excess of their tuition and fees can get an advance to purchase books from the Book Store, located at 112 Boling University Center.
- Funds are applied to the student's Skyhawk card
- You can request a book loan up to \$750
- You can obtain an estimate from the Book Store and provide this to our office to increase your advance.
- Please see follow the link provided for the paper form.
  - <https://www.utm.edu/departments/bursar/pdfs/NewBookLoan.pdf>
- An online request can be done in Banner
  - **My UTMartin enter username and password**
  - **Click on “Banner” tab**
  - **Click on “Student Records” tab**
  - **Click on “Book Loan Application”**
  - **Select the correct term from the dropdown**
  - **Select “Continue”**

- **Enter amount up to \$750.00 in the “Requested amount for Book Loan”**
- **Click “I Agree. Submit My Book Loan Application”**

## Computer Loan

- Students who have financial aid in excess of their tuition and fees can get an advance to purchase a computer from the Computer Store, located at 108 Boling University Center.
- Funds are applied to the student’s Skyhawk card
- You can request a computer loan up to \$1,250
- You can obtain an estimate from the Computer Store and provide this to our office to increase your advance.
- Please see follow the link provided for the paper form.
  - <https://www.utm.edu/departments/bursar/pdfs/NewComputerStoreLoan.pdf>
- An online request can be done in Banner
  - **My UTMartin enter username and password**
  - **Click on “Banner” tab**
  - **Click on “Student Records” tab**
  - **Click on “Computer Loan Application”**
  - **Select the correct term from the dropdown**
  - **Select “Continue”**
  - **Enter amount up to \$1,250.00 in the “Requested amount for Computer Loan”**
  - **Click “I Agree. Submit My Computer Loan Application”**

## Fee Payment

- Fees must be paid in full or a payment plan set up by the payment deadline
- Use the following steps to login and make payment/payment plan to ensure your classes are not dropped.
  - **Under My UTMartin, enter your username and password**

- **Click on “Banner” tab**
- **Under “Students”, click on “Student Records”**
- **Click “Finalize Registration with Payment”**
- **Based on your current balance, the appropriate links and options will appear to you.**

## Fee Waivers

- Many students have a fee waiver/fee discount form
  - Some examples include being the dependent of a licensed school teacher or being a dependent of a state employee.
- Each type fee waiver/discount form pays a different percentage
  - Visit link below and view the Fee Waiver/Discount Chart
  - <http://www.utm.edu/departments/bursar/tuition.php>
- For Fall semesters, we begin accepting fee waivers in July.
- Forms sent prior to acceptance time will be sent back.

## Payment Plan

- During Fall and Spring semesters, we offer a 4 part payment plan.
- During the Summer semesters, we offer a 2 part payment plan.
- $\frac{1}{4}$  of the total amount due plus a \$30.00 fee is due at the time of setup.
- Example
  - Fall Tuition, Fees, Meal Plan, and Housing: \$7,111.00
  - Financial Aid (Including Scholarships, Grants, and Loans): \$5,000.00
  - Account Balance: \$2,111.00
  - $\$2,111.00/4 = \$527.75 + \$30.00$  (Set up Fee)= \$557.75 due at set up
  - Payments Due 9/15, 10/15, & 11/15 are \$527.75
- To set up a payment plan....
  - **My UTMartin enter username and password**

- **Click on “Banner” tab**
- **Click on “Personal” tab**
- **Click “Payments and Deposits”**
- **Click on “Click here for Online Payments/E-Bills”**
- **Click “Payment Plans”**
- **Click “Enroll Now”**
- **Select the appropriate term, read Plan Agreement, then click “Continue”**
- **Click on Display Payment Schedule**
  - Please be sure to review payment schedule carefully before completing
- **Total Due Now- down payment & service fee must be paid at time of enrollment**
- **Total of Installments- Amount to pay by due date**
- **At the bottom of the page is the option to set up installment for automatic payment**
  - Select Yes or No; then click Continue
- **Select Payment Method & Click Continue**
  - Enter payment method information; then click continue
- **Read, then sign the payment plan agreement by check “I Agree”. Click Continue**
- **Payment & Deferment Plan Enrollment Confirmation is shown**

## Refunds

- Refund checks are normally processed one (1) time per week at minimum.
- Effective Spring 2016, student refund checks are no longer available for pickup at the Bursar's Office windows. Refund checks will only be mailed to the student's permanent address listed in Banner or directly deposited to bank accounts.
- You can set up direct deposit on-line through you banner account.
  - **Under My UTMartin, enter your username and password**
  - **Click on “Banner” tab**
  - **Click on “Personal” tab**
  - **Click on “Payments and Deposits”**
  - **Click on “Click here for Online Payments/E-Bills”**

- **Click on “eRefunds”**
- **Click “Set Up Account”**
- **Indicate the Account Type (Checking or Savings)**
- **Enter the Routing Number**
- **Enter the Bank Account Number**
- **Confirm the Bank Account Number**
- **Enter name on Account**
- **Enter the Billing Address**
- **Enter the name of the account in the “Save Payment Method as” box.**
  - **This can be anything you would like such as My Checking Account**
- **Items to Note**
  - The account that you are setting up must have a routing number.
  - Your account must be entered at least 2 days prior to the refund process in order to be verified.

## Skyhawk Card

- Your Skyhawk Card is more than just an id card. You can use your card to make cash free purchases at campus locations that accept the Skyhawk Card as a method of payment. You can also use your card to access building across campus.
- You can load your card with money in three (3) different ways
  - Bursar's Office Windows from 8:00AM to 4:45PM Monday through Friday
  - Online through Banner
    - **My UTMartin enter username and password**
    - **Click on “Banner” tab**
    - **Click on “Personal” tab**
    - **Click “Payments and Deposits”**
    - **Click on “Click here for Online Payments/E-Bills”**
    - **Click “eDeposits”**
    - **Select “Skyhawk Card” from the “Term” dropdown**