Tips and How-To Steps from the Bursar’s Office

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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 for the preceding year will be available on or before each January 31st.
- Students can opt to receive a paper copy mailed to their permanent address or a digital copy only. Students will always receive a digital copy, regardless of whether they receive a paper copy as well.
- My UTMartin, enter username and password
- Click on the Touchnet link
- Click on the My Account tab in the upper right
- Click on Consents and Agreements
- Your current selection will appear
- The 1098-T form will only report in Box 1 payments made toward qualified tuition and related expenses billed within the same calendar year. Box 5 displays the total of all scholarship and/or grants administered and processed by the University of Tennessee at 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
- My UTMartin, enter your username and password
- Click on the Touchnet link
- Under My Profile Setup, 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 to 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.
- An online request can be done in Banner
  - My UTMartin, enter username and password
  - Click on Banner Self Service link
  - 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 field

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.
- An online request can be done in Banner
  - My UTMartin, enter username and password
  - Click on Banner Self Service link
  - 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 field
  - Click “I Agree. Submit My Computer Loan Application”

Fee Payment/Payment Deadline

- 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.
  - My UTMartin, enter your username and password
Click on the Touchnet link

Click the Make Payment button

Select Payment Option: Current Account Balance, Current Statement Amount, Pay by Term, or Pay by Line Item

Click Add by the amount in the box you wish to pay

Click Continue

Select Payment Method: Credit Card via Paypath (includes 2.85% fee) or Electronic Check

Enter credit card or checking account information

Click Continue

You will be able to choose if you wish to save the account for future use or as your refund account

You will receive a confirmation message when the payment is complete

Fee Waivers

- See below for a listing of fee waivers/discount forms offered:
  - Children of Educators and Children of State Employees (age limit 23)
  - Special Policy for Totally Disabled or Elderly Audit/Credit Students (age 60 audit/65 credit)
  - State Employees
  - TBR Employees, Spouse, Dependents (dep. age limit 26)
  - UT Employees (Includes employees at Chattanooga, Health Science Center, Knoxville, and Martin campuses)
  - UT Employee Spouse/Dependents (Includes employees at Chattanooga, Health Science Center, Knoxville, and Martin campuses) (dep. age limit 26)

- Each type fee waiver/discount form pays a different percentage of fees or number of credit hours. For an updated chart each year, see the Bursar webpage, under Tuition and Fees.

- Submit to fee waivers@utm.edu or 731-881-7813 (fax)

- Acceptance Dates
  - Fall semester: July 1 – last day of classes
  - Spring semester: October 1 – last day of classes
  - Summer semesters: March 1 – last day of classes

- 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 the Touchnet link
  - Click Enroll in Payment Plan
  - 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; click Continue
  - Select Payment Method & Click Continue
    - Enter payment method information; click Continue
  - Read, then sign the payment plan agreement by checking “I Agree”. Click Continue
  - Payment & Deferment Plan Enrollment Confirmation is shown
Refunds

- Refund checks are normally processed one (1) time per week at minimum.
- Refund checks will only be mailed to the student’s permanent address listed in Banner or directly deposited to bank accounts.
- Refund accounts for direct deposit can be set up in Touchnet
  - My UTMartin, enter your username and password
  - Click the Touchnet link
  - Click on Electronic Refunds
  - 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 you choose for the account in the Save Payment Method As box
- Items to Note
  - The account that you are setting up must have a routing number.
  - Your account must be entered at least 24 hours 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 buildings across campus.
- You can load your card with money in three (3) different ways
  - Bursar’s Office Window from 8:00 AM to 4:45 PM Monday through Friday
  - Online through Touchnet:
    - My UTMartin, enter username and password
    - Click on the Touchnet link
    - Click Deposits at the top of the screen
    - Select Skyhawk Card from the Term dropdown
    - Select Skyhawk Card from the Deposit dropdown and click Continue
    - Type in the amount of deposit and click Continue
    - Enter payment information and complete deposit
Real-Time Statement

- At any time students can generate a real-time and up to date statement for their student account
  - My UT Martin, enter username and password
  - Click on the Touchnet link
  - Under the Statements section, click on Real-Time Statement
  - Select the Term you wish to view from the dropdown menu