

# 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 will 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 [feewaivers@utm.edu](mailto:feewaivers@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 UTMartin, 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**