

# Education Credits – Preparation

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Tyler, Texas

This simple guide is provided to help local taxpayers gather the information they need to see if they qualify for an education credit. This includes instructions for getting educational expense information from two of the local colleges, UT Tyler and Tyler Junior College. Practitioners not in the Tyler area may want to create a guide for accessing account information from their local colleges and universities.

While this is written primarily for taxpayers, practitioners may just want to have the client log into the account or provide the login information and then access, copy, and format the data themselves. That would alleviate some of the taxpayer's frustration and possibly avoid time-consuming errors. Also included here are simple instructions for accessing prior year tax return information for amending returns.

This is one in a series of articles I've written on how to claim education credits. One version of the primary article was posted on the blog, [Switched Keys](#). The articles and other resources are part of an AOTC toolkit that can be downloaded from [www.tylerhosting.com/EdCredit/](http://www.tylerhosting.com/EdCredit/). Comments, questions, and corrections are welcome and can be submitted through the contact form on the blog.

## AOTC Toolkit

- Education Credit Regulations: A discussion of the AOTC and the regulations that permit inclusion of grants and scholarships to increase qualifying expenses and the credit. Coordinating with other education programs is also discussed.
- Education Credit Preparation: Specific instructions for accessing and retrieving expense information from local institutions UT Tyler and TJC.
- Education Credit Calculations: A method for tabulating qualifying expenses and calculating the credit. Includes the spreadsheet version of the AOTC worksheet.
- AOTC Flowcharts: The Student Qualifications Test assists in determining if the taxpayer qualifies for the credit. Same chart as published by the IRS. The Refundable Credit Test helps determine if the taxpayer qualifies for the refundable portion of the AOTC. Instead of the IRS outline of those who **do not qualify**, this flowchart identifies those that **do qualify**.
- AOTC Worksheet: The AOTC worksheet assists in maximizing the AOTC qualifying expenses and calculating the amount of taxable scholarships. Includes examples from IRS publications and regulations. Not the same as related IRS published worksheets.

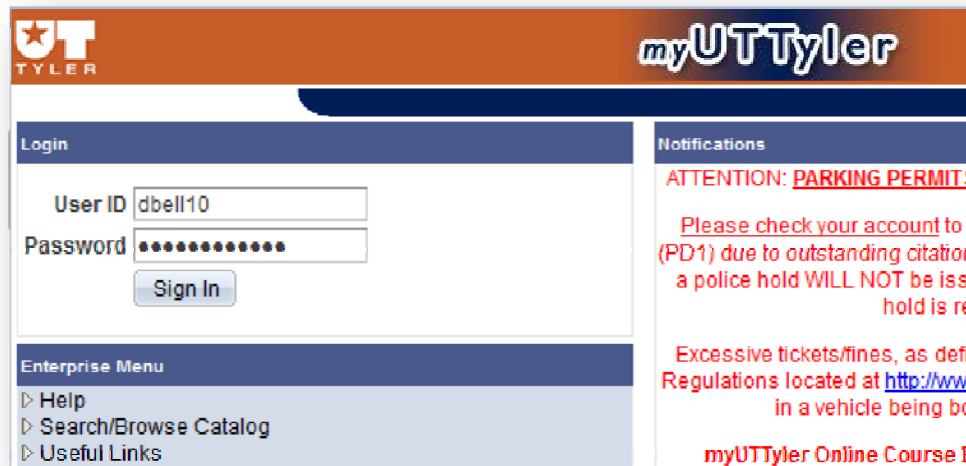
UT Tyler does not make it easy to download information on your qualifying expenses. This is one way to get the information that you need from their website if you do not have that information elsewhere.

## Login

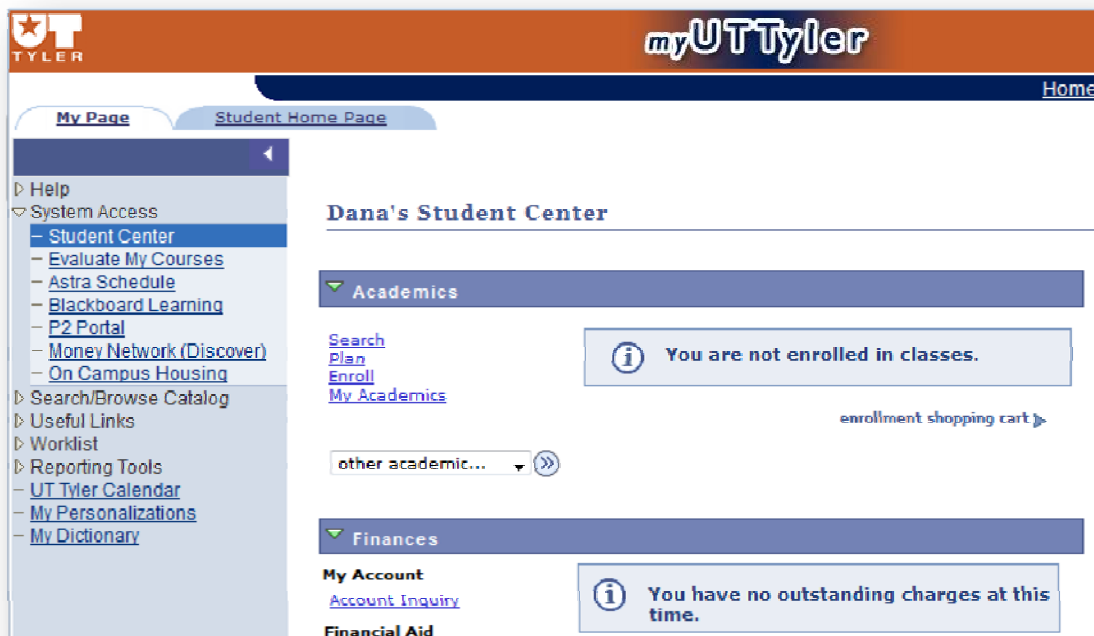
Go to your browser and enter

**my.utt Tyler.edu**

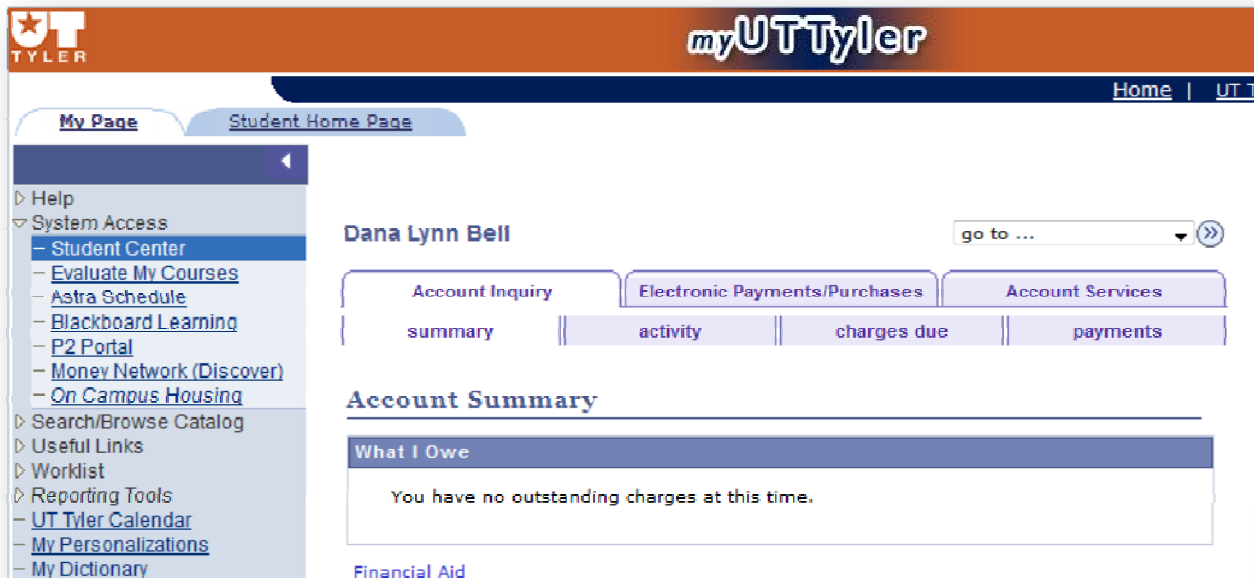
This will redirect to something that starts with *https://sis-portal-prod.utt Tyler.edu/psp/* and prompts the user to log in.



Enter your User ID and password and click Sign In. Your UserID is normally the part of your patriots email address before the @ sign. Once you are in, you will see several items in the left menu



Click on Student Access, then on Student Center, and under Finances, click Account Inquiry



The display will then show several tabs at the top with Account Summary as the initial section shown. Click on the Activity sub-tab to select the transactions you will need.

## Inquiry



Under the subhead View by, select the dates you want to include in your inquiry. Ideally, enter the date three months before the start of the year, and then the end of the year. For 2014, the dates would be 10/01/2013 and 12/31/2014. Starting in the previous year is necessary because the University enters charges for Spring 2014 at the end of 2013.

Then select the term to report on, and press Go

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Account Activity

View by

From 10/01/2011 To 12/31/2012 2012 Spring go

Posted Date	Item	Term	Charge	Payment	Refund
01/20/2012	Refund - Other	2012 Spring			1,668.00
01/09/2012	ACCT Course Fee - UNDERGRADUATE INTERNSHIP	2012 Spring	51.00		
01/09/2012	ENGL Course Fee - CREATIVE WRITING I	2012 Spring	-37.50		
01/09/2012	Refund - Other	2012 Spring			2,737.00
01/06/2012	Direct Stafford Loan	2012 Spring		2,737.00	
01/06/2012	Federal Pell Grant	2012 Spring		2,775.00	
01/06/2012	M J Harvey Sr Memorial End	2012 Spring		1,000.00	
01/06/2012	Texas Public Ed. Grant	2012 Spring		1,000.00	

Initially the display will show only 10 lines at a time. In the table header, click on 'View All' to show all transactions (up to 100) for the term. If more than 100 items, you will have to display and process each 100 until complete.

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Account Activity

View by

From 10/01/2011 To 12/31/2012 2012 Spring go

Posted Date	Item	Term	Charge	Payment	Refund
01/20/2012	Refund - Other	2012 Spring			1,668.00
01/09/2012	ACCT Course Fee - UNDERGRADUATE INTERNSHIP	2012 Spring	51.00		
01/09/2012	ENGL Course Fee - CREATIVE WRITING I	2012 Spring	-37.50		
01/09/2012	Refund - Other	2012 Spring			2,737.00
01/06/2012	Direct Stafford Loan	2012 Spring		2,737.00	
01/06/2012	Federal Pell Grant	2012 Spring		2,775.00	
01/06/2012	M J Harvey Sr Memorial End	2012 Spring		1,000.00	
01/06/2012	Texas Public Ed. Grant	2012 Spring		1,000.00	

What you do now will depend on what the tax preparer can work with. I haven't been able to print the complete list, so I copy and paste the information from the browser to Excel first.

Account Activity

View by

From 10/06/2011 To 12/06/2014 2012 Spring go

Posted Date	Item	Term	Charge	Payment	Refund
01/20/2012	Refund - Other	2012 Spring			1,668.00
01/09/2012	ACCT Course Fee - UNDERGRADUATE INTERNSHIP	2012 Spring	51.00		
01/09/2012	ENGL Course Fee - CREATIVE WRITING I	2012 Spring	-37.50		
01/09/2012	Refund - Other	2012 Spring			2,737.00
01/06/2012	Direct Stafford Loan	2012 Spring		2,737.00	
01/06/2012	Federal Pell Grant	2012 Spring		2,775.00	
01/06/2012	M J Harvey Sr Memorial End	2012 Spring		1,000.00	
01/06/2012	Texas Public Ed. Grant	2012 Spring		1,000.00	

In order to copy/paste select the information on the page beginning to the left of Transactions head, mark all items in the table. Selecting is done by clicking, holding, and dragging to highlight the information you want. Right-click and select Copy.

Book1

	A	B	C	D	E	F	G
1							
2		Transacti ons	irst 1-39 of 39				
3		Posted Date	Item	Term	Charge	Payment	Refund
4		#####	Refund - Other	2012 Spring			1,668.00
5			ACCT Course Fee				
6		1/9/2012	- UNDERG RADUATE INTERNS HIP	2012 Spring	51		

Open Excel, select a cell, right-click and select paste. It will not look pretty at first but it can be fixed with a couple of steps.

	A	B	C	D	E	F	G
1							
2		Transactions	Find   View 10   First 1-39 of 39				
3		Posted Date	Item	Term	Charge	Payment	Refund
4		1/20/2012	Refund - Other	2012 Spring			1,668.00
5			ACCT Course Fee				
6		1/9/2012	- UNDERGRADUATE INTERNSHIP	2012 Spring	51		

The first step is to adjust the column widths to show all information. Click between the column headers and drag to widen the column to show the information without breaking words and obliterating the dates.

	A	B	C	D	E	F	G
1							
2		Transactions	Find   View 10   First 1-39 of 39				
3		Posted Date	Item	Term	Charge	Payment	Refund
4		1/20/2012	Refund - Other	2012 Spring			1,668.00
5			ACCT Course Fee				
6		1/9/2012	- UNDERGRADUATE INTERNSHIP	2012 Spring	51		
7			ENGL Course Fee				
8		1/9/2012	- CREATIVE WRITING I	2012 Spring	-37.5		
9		1/9/2012	Refund - Other	2012 Spring			2,737.00
10		1/6/2012	Direct Stafford Loan	2012 Spring		2,737.00	
11		1/6/2012	Federal Pell Grant	2012 Spring		2,775.00	
12		1/6/2012	M J Harvey Sr Memorial End	2012 Spring		1,000.00	
13		1/6/2012	Texas Public Ed. Grant	2012 Spring		1,000.00	

Next, select the entire worksheet by clicking in the top left corner.

Finally, adjust row heights by double clicking in the left column between two of the row headers. All rows should then be one or two lines high.

### Repeat

Repeat the Inquiry for each term attended. The information for separate terms does not have to be separate so you can append it to the previous data. The site software does not have a way to select all terms in a particular tax year. Be careful not to include amounts from terms in other years.

Now you can save and print the spreadsheets or bring the files to the tax preparer. The tax preparer can then evaluate the expenses and payments to see what qualifies for the education credit. Bringing spreadsheet files are better since he can more easily adjust the amounts to categorize and total the expenses, payments, and possible credit.

## **1098-T**

Next click Account Services

Click 1098t

print applicable forms

## Tyler Junior College

TJC provides students easy access to their account from their home page.

### Login

Go to your browser and enter

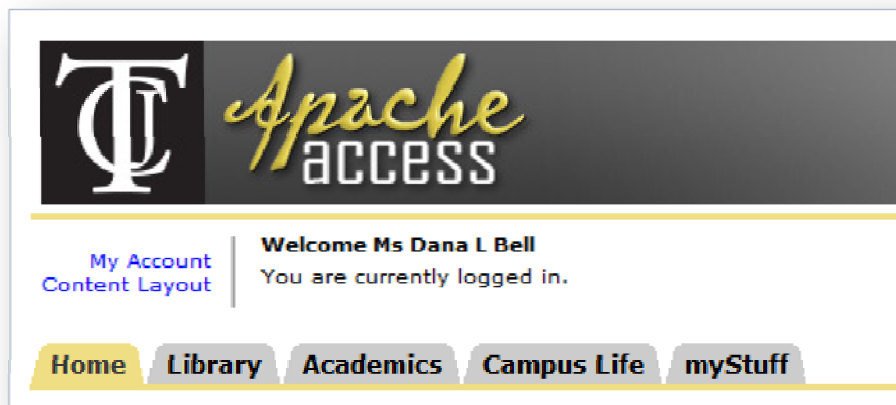
<http://www.tjc.edu/>



Students can log into their Apache Access account through Quick Links. Click on Quick Links and allow the page to expand the header showing the login window.

The image shows a login window titled 'Apache Access' on a blue background. It features two input fields: the top one contains the ID 'A007' and the bottom one contains a masked password '\*\*\*\*\*'. To the right of the password field is a blue 'Sign in' button. Below the fields are two links: 'Forgot password?' and 'Login trouble?'.

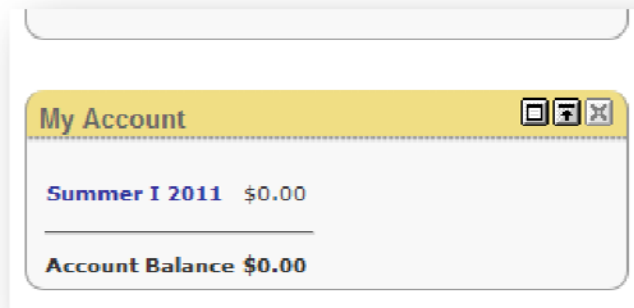
Sign in using the students ID and password.



This will bring you to a site starting with <http://myapacheaccess.tjc.edu/>. Click on the Academics tab.



## Inquiry



In the My Account box in the bottom right corner, select the term to view. Some financial data may be shown but you may need to select the more detailed information. Transactions should show dates, amounts, and description.

[Plan](#) | [Statement and Payment History](#) | [Sta](#)

At the bottom of the page click Statement and Payment History

[Term](#) | [Account Detail for Term](#) | [Mak](#)

At the bottom of the next screen, click Account Detail for Term

The screenshot shows a form titled "Select Term". It features a dropdown menu labeled "Select a Term:" with "Summer I 2013" selected. Below the dropdown is a "Submit" button. At the bottom of the form, the text "RELEASE: 8.5.4.4" and "© 2014 Elusion Company, L.P. and its affiliates" is visible.

**201130 Summer I 2011 Term Detail**

<b>Detail Code</b>	<b>Description</b>	<b>Item Date</b>	<b>Charge</b>	<b>Payment</b>	<b>Balance</b>	<input type="button" value="Pay Now"/>
DIST	Distance Education Fee	02-JUN-11	\$15.00			
HLTF	Health Service Fee	02-JUN-11	\$15.00			
LAB	Lab Fees	02-JUN-11	\$25.00			
PARK	Parking Fee	02-JUN-11	\$15.00			
REG3	Registration Fee	02-JUN-11	\$25.00			
GNEB	General Education Fee	02-JUN-11	\$136.00			
STLF	Student Life Fee	02-JUN-11	\$8.00			
TUI1	In-District Tuition	02-JUN-11	\$112.00			
DIST	Distance Education Fee	02-JUN-11	-\$15.00			
HLTF	Health Service Fee	02-JUN-11	-\$15.00			
LAB	Lab Fees	02-JUN-11	-\$25.00			
PARK	Parking Fee	02-JUN-11	-\$15.00			
REG3	Registration Fee	02-JUN-11	-\$25.00			
GNEB	General Education Fee	02-JUN-11	-\$136.00			
STLF	Student Life Fee	02-JUN-11	-\$8.00			
TUI1	In-District Tuition	02-JUN-11	-\$112.00			
HLTF	Health Service Fee	02-JUN-11	\$15.00			
PARK	Parking Fee	02-JUN-11	\$15.00			
REG3	Registration Fee	02-JUN-11	\$25.00			
GNEB	General Education Fee	02-JUN-11	\$102.00			
STLF	Student Life Fee	02-JUN-11	\$6.00			
TUI1	In-District Tuition	02-JUN-11	\$84.00			
MCV	Mastercard/Visa Payment	12-MAY-11		\$247.00		
<b>Net Term Balance</b>					<b>\$0.00</b>	

Then select the term to display the report for the applicable term. Select the items for the term, copy and paste into a spreadsheet. Other display options are available, but make sure dates and description are shown.

Select another term at the bottom for other semesters to make further inquiries.

## 1098-T

TJC lets a third-party service handle the availability of 1098T's. To access your 1098T, use your browser and go to

**[www.1098t.com](http://www.1098t.com)**

Once you log in you may be shown a page

FORM 1098-T ELECTRONIC DELIVERY AUTHORIZATION

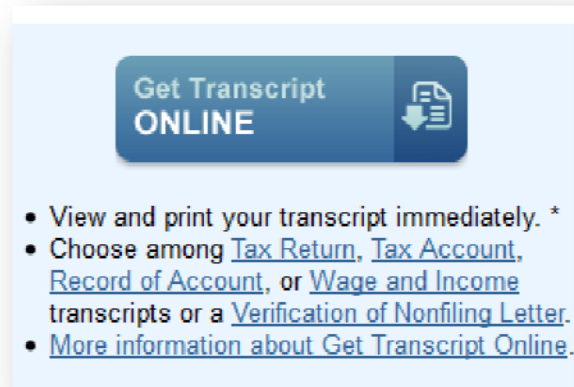
You don't have to authorize electronic delivery. By authorizing electronic delivery, you will have future forms e-mailed to you instead of receiving paper forms in the mail. Instead, click on the Student Information in the left side panel, and select the year and school, and click View My 1098T Tax Form. This will show a pdf download that you can save.


## IRS transcript

You can amend tax returns up to 3 years after their due date (without extensions). Thus, tax years 2011, 2012, and 2013 can all be amended before April 15 this year. If you do not have copies of your return, you can access your tax return information from the IRS website.

The IRS makes taxpayers prior year return information available on line using transcripts. The actual return is not there but the information you will need to review or amend a return is available. Using your browser go to

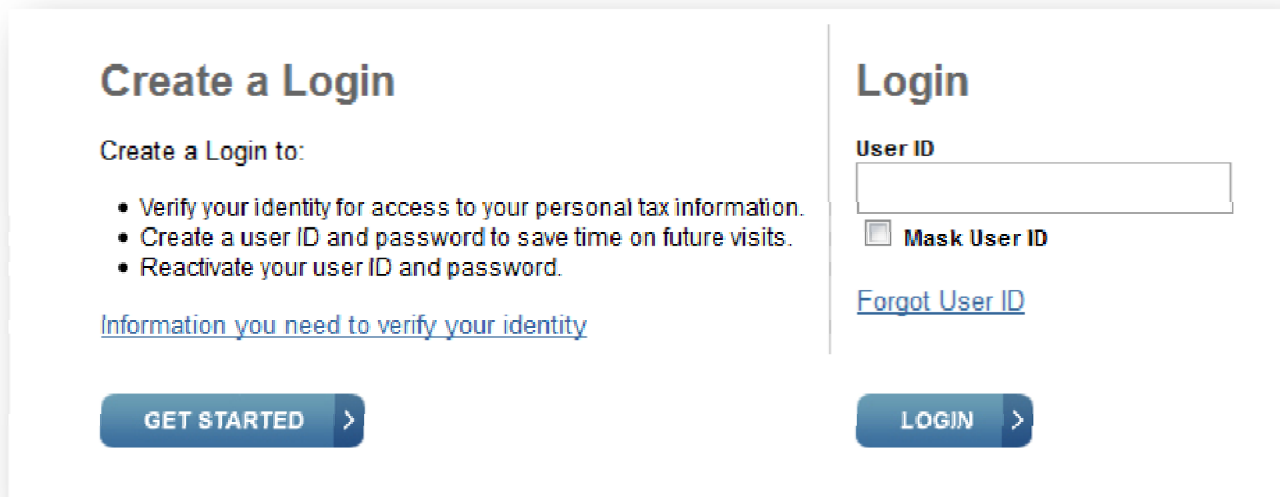
<http://www.irs.gov/Individuals/Get-Transcript>



**Get Transcript ONLINE** 

- View and print your transcript immediately. \*
- Choose among [Tax Return](#), [Tax Account](#), [Record of Account](#), or [Wage and Income transcripts](#) or a [Verification of Nonfiling Letter](#).
- [More information about Get Transcript Online](#).

Select Get Transcript Online



**Create a Login**

Create a Login to:

- Verify your identity for access to your personal tax information.
- Create a user ID and password to save time on future visits.
- Reactivate your user ID and password.

[Information you need to verify your identity](#)

**GET STARTED >**

**Login**

User ID

Mask User ID

[Forgot User ID](#)

**LOGIN >**

Log in to the site with your User ID and password (next screen). If you have not logged in before you will have to create an account. The IRS will ask several questions to verify your identity.

## Get Transcript

Select a reason you need a transcript:

GO >

Select a reason for requesting your transcript: **Federal Tax**

You selected: **Federal Tax**

We suggest you download: **Record of Account Transcript**

Below are the transcripts and years available.

### Return Transcript

[2013](#)

[2012](#)

[2011](#)

[2010](#)

### Account Transcript

[2013](#)

[2012](#)

[2011](#)

[2010](#)

[2009](#)

N/A

N/A

N/A

N/A

N/A

Show Less

### Record of Account Transcript

[2013](#)

[2012](#)

[2011](#)

[2010](#)

### Wage & Income Transcript

[2013](#)

[2012](#)

[2011](#)

[2010](#)

[2009](#)

[2008](#)

[2007](#)

[2006](#)

[2005](#)

[2004](#)

Show Less

## Glossary

### Return Transcript

Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return. In many cases, a Return Transcript will meet the requirements of lending institutions offering mortgages and student loans.

### Record of Account Transcript

Record of Account Transcripts combine the information from tax account and tax return transcripts.

### Account Transcript

**Record of Account Transcript** (includes return transcript) for year

Select the tax year you want to retrieve. The tax year is the year before when you file your return. Choose **Save File** and name the file with the tax year, like *2013TaxTranscript.pdf*. While you are there, you may want to get all four years available. Print or provide the files to your preparer.