

# UNIVERSIDAD CENTRAL DE BAYAMÓN

## OFICINA DE TESORERÍA

### MANUAL *1098-T* SELF SERVICE



Acceder a ucb.edu.pr, luego **SERVICIOS EN LÍNEA** buscar **SELF SERVICE**



The screenshot displays the UCB (Universidad Central de Bayamón) website. At the top, there is a purple header bar containing the phone number 787-786-3030, a search icon, social media icons for Facebook, Twitter, and YouTube, and a yellow button labeled 'Solicita Información'. Below the header, the UCB logo is on the left, and a navigation menu is on the right. The menu items are 'Conoce la UCB', 'Servicios', 'Programas Académicos', 'Vida Estudiantil', and 'Servicios en Línea'. The 'Servicios en Línea' item is highlighted with a red box. A dropdown menu is open under 'Servicios en Línea', showing options: 'Educación a Distancia', 'Biblioteca en Línea', 'Email Institucional', 'WebAdvisor', and 'Self Service'. The 'Self Service' option is highlighted with a yellow box. The main banner features a large yellow phone number 787.786.3030 and a photo of three students (a male athlete, a female nurse, and a male EMT) smiling. At the bottom of the banner, a yellow speech bubble contains the slogan 'Si lo vas a hacer hazlo bien' in purple text. In the bottom left corner, there is a small image of two UCB mascots.

UCB  
UNIVERSIDAD CENTRAL DE BAYAMÓN

787-786-3030

Conoce la UCB | Servicios | Programas Académicos | Vida Estudiantil | **Servicios en Línea**

- Educación a Distancia
- Biblioteca en Línea
- Email Institucional
- WebAdvisor
- Self Service**

**"Si lo vas a hacer  
hazlo bien"**



Escribir su **USUARIO** y **CONTRASEÑA**, presionar **SIGN IN**



Sign In

User name

jp0012345

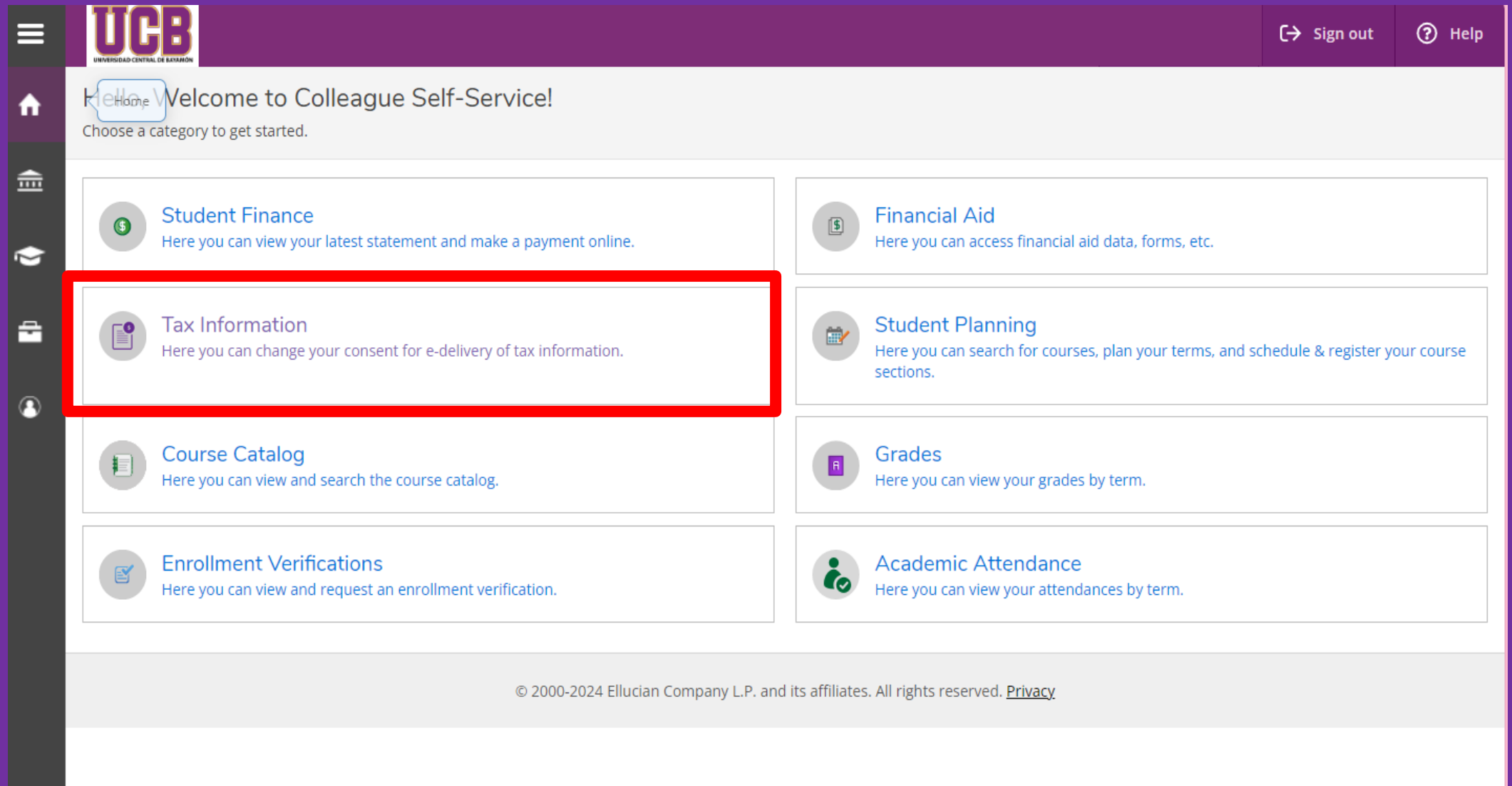
Password

\*\*\*\*\*

Sign In



# Acceder a *TAX INFORMATION*



The screenshot shows the UCB Colleague Self-Service portal. The header includes the UCB logo and navigation links for Sign out and Help. A welcome message from Kelly is displayed. A sidebar on the left contains icons for Home, UCB, and various service categories. The main content area features eight service tiles: Student Finance, Financial Aid, Tax Information (highlighted with a red border), Student Planning, Course Catalog, Grades, Enrollment Verifications, and Academic Attendance. Each tile includes an icon, a title, and a brief description of the service.

**UCB**  
UNIVERSIDAD CENTRAL DE BAYAMON

Sign out Help


Kelly, Welcome to Colleague Self-Service!  
Choose a category to get started.

- Student Finance**  
Here you can view your latest statement and make a payment online.
- Financial Aid**  
Here you can access financial aid data, forms, etc.
- Tax Information**  
Here you can change your consent for e-delivery of tax information.
- Student Planning**  
Here you can search for courses, plan your terms, and schedule & register your course sections.
- Course Catalog**  
Here you can view and search the course catalog.
- Grades**  
Here you can view your grades by term.
- Enrollment Verifications**  
Here you can view and request an enrollment verification.
- Academic Attendance**  
Here you can view your attendances by term.

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Presionar en el círculo **RECEIVE MY 1098 ONLY  
ELECTRONIC FORMAT**, luego **SAVE**



Sign out Help

Financial Information • Tax Information

Home

Tax Information

1098 Information

Select an option below to set your preferences for receiving your electronic 1098:

☐ Receive my 1098 only in electronic format

By selecting this option, I agree to receive my official 1098-E and/or 1098-T only in electronic format by accessing the web and viewing/printing. I understand that by consenting to receive my 1098 tax forms in electronic format, I will not receive a paper 1098 statement. I understand that I have the ability at any time to return to this form and remove my consent.

☒ Withhold my consent

I choose to withhold my consent and understand by doing so that I will receive my official 1098-E and/or 1098-T in paper format. I understand that I have the ability at any time to return to this form and consent to receiving my official 1098-E and/or 1098-T in electronic format only.

Save

1098 Statements

| Tax Year | Notation                             |
|----------|--------------------------------------|
| 2023     | <a href="#">2023 1098T Statement</a> |



A continuación aparecen sus **1098-T** e **HISTORIAL DE CONSENTIMIENTOS** para obtener su 1098-T de forma electronica.

### 1098 Statements

| Tax Year | Notation                             |
|----------|--------------------------------------|
| 2023     | <a href="#">2023 1098T Statement</a> |
| 2022     | <a href="#">2022 1098T Statement</a> |
| 2021     | <a href="#">2021 1098T Statement</a> |

### Electronic 1098 Consent History

| Date             | Consent Status |
|------------------|----------------|
| 2/9/2024 3:52 PM | Consent Given  |



*Para obtener su 1098-T* presionar el año deseado.  
Ejemplo para el año 2023: ***2023 1098T STATEMENT.***

| 1098 Statements |                                      | Electronic 1098 Consent History |                |
|-----------------|--------------------------------------|---------------------------------|----------------|
| Tax Year        | Notation                             | Date                            | Consent Status |
| 2023            | <a href="#">2023 1098T Statement</a> | 2/9/2024 3:52 PM                | Consent Given  |
| 2022            | <a href="#">2022 1098T Statement</a> |                                 |                |
| 2021            | <a href="#">2021 1098T Statement</a> |                                 |                |



## Instructions for Student

You, or the person who can claim you as a dependent, may be able to claim an education credit on Form 1040 or 1040-SR. This statement has been furnished to you by an eligible educational institution in which you are enrolled, or by an insurer who makes reimbursements or refunds of qualified tuition and related expenses to you. This statement is required to support any claim for an education credit. Retain this statement for your records. To see if you qualify for a credit, and for help in calculating the amount of your credit, see Pub. 970, Form 8863, and the Instructions for Form 1040. Also, for more information, go to [www.irs.gov/Credits-Deductions/Individuals/Qualified-Education-Expenses](http://www.irs.gov/Credits-Deductions/Individuals/Qualified-Education-Expenses).

Your institution must include its name, address, and information contact telephone number on this statement. It may also include contact information for a service provider. Although the filer or the service provider may be able to answer certain questions about the statement, do not contact the filer or the service provider for explanations of the requirements for (and how to figure) any education credit that you may claim.

**Student's taxpayer identification number (TIN).** For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS. **Caution:** If your TIN is not shown in this box, your school was not able to provide it. Contact your school if you have questions.

**Account number.** May show an account or other unique number the filer assigned to distinguish your account.

**Box 1.** Shows the total payments received by an eligible educational institution in 2023 from any source for qualified tuition and related expenses less any reimbursements or refunds made during 2023 that relate to those payments received during 2023.

**Box 2.** Reserved for future use.

**Box 3.** Reserved for future use.

**Box 4.** Shows any adjustment made by an eligible educational institution for a prior year for qualified tuition and related expenses that were reported on a prior year Form 1098-T. This amount may reduce any allowable education credit

that you claimed for the prior year (may result in an increase in tax liability for the year of the refund). See "recapture" in the index to Pub. 970 to report a reduction in your education credit or tuition and fees deduction.

**Box 5.** Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of the education credit you claim for the year.

**TIP:** You may be able to increase the combined value of an education credit and certain educational assistance (including Pell Grants) if the student includes some or all of the educational assistance in income in the year it is received. For details, see Pub. 970.

**Box 6.** Shows adjustments to scholarships or grants for a prior year. This amount may affect the amount of any allowable tuition and fees deduction or education credit that you claimed for the prior year. You may have to file an amended income tax return (Form 1040-X) for the prior year.

**Box 7.** Shows whether the amount in box 1 includes amounts for an academic period beginning January–March 2024. See Pub. 970 for how to report these amounts.

**Box 8.** Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution.

**Box 9.** Shows whether you are considered to be enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level educational credential.

**Box 10.** Shows the total amount of reimbursements or refunds of qualified tuition and related expenses made by an insurer. The amount of reimbursements or refunds for the calendar year may reduce the amount of any education credit you can claim for the year (may result in an increase in tax liability for the year of the refund).

**Future developments.** For the latest information about developments related to Form 1098-T and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/Form1098T](http://www.irs.gov/Form1098T).

**Free File Program.** Go to [www.irs.gov/FreeFile](http://www.irs.gov/FreeFile) to see if you qualify for no-cost online federal tax preparation, e-filing, and direct deposit or payment options.

☐ CORRECTED

|  |               |  |   |   |
|--|---------------|--|---|---|
| FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number<br><b>UNIVERSIDAD CENTRAL DE BAYAMON</b><br><b>PO BOX 1725 BAYAMON, PR 00960-1725</b> |               | 1 Payments received for qualified tuition and related expenses<br><b>\$ 6,040.00</b>   | OMB No. 1545-1574<br><b>2023</b><br>Form <b>1098-T</b>                      | <b>Tuition Statement</b><br><br><b>Copy B For Student</b><br><br>This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return. |
| 787-786-3030 Ext. 2132   | 2             | 3  | 4 Adjustments made for a prior year<br><b>\$</b>                            |   |
| FILER'S employer identification no.<br><b>66-0259904</b>   | STUDENT'S TIN | 5 Scholarships or grants<br><b>\$ 2,620.00</b>   | 6 Adjustments to scholarships or grants for a prior year<br><b>\$</b>       |   |
| STUDENT'S name<br>:  |               | 7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2024 <input type="checkbox"/> | 8 Checked if at least half-time student <input checked="" type="checkbox"/> |   |
| Street address (including apt. no.)<br>:   |               | 9 Checked if a graduate student <input type="checkbox"/>   | 10 Ins. contract reimb./refund<br><b>\$</b>                                 |   |
| City or town, state or province, country, and ZIP or foreign postal code<br>:  |               |  |   |   |
| Service Provider/Acct. No. (see instr.)  |               |  |   |   |

Form **1098-T**

(keep for your records)

[www.irs.gov/Form1098T](http://www.irs.gov/Form1098T)

Department of the Treasury - Internal Revenue Service





# ¿Necesitas Asistencia?



787-786-3030, exts. 2130, 2131, 2132



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Ave. Zaya Verde Reparto La Milagrosa  
Hato Tejas Bayamón, PR 00959

