

## My.Whittier.Edu - Business Office FAQ's

Proxy my.whittier.edu Authorization Link Descriptions - Business Office.....	1
Where can I view and print my tuition billing statement?.....	1
Where can I view my past tuition billing statements? .....	1
Where can I see payment history for my tuition account?.....	1
What is “Unbilled Activity” on my tuition statement screen?.....	2
Where did my Account Summary information go? .....	2
How do I make an electronic payment for my tuition account? .....	2
What type of bank accounts can be used to make one-time electronic payments? .....	2
What is a 1098-T Tax Statement?.....	2
Where can I get a copy of my 1098-T Tax Statement? .....	2
Can I get copy of last year’s 1098-T Tax Statement?.....	2
Why didn't I receive a 1098-T Tax Statement? .....	3
Did you send a copy of my 1098-T form to the IRS?.....	3
What information is reported on the 1098-T Tax Statement? .....	3

## Proxy my.whittier.edu Authorization Link Descriptions - Business Office

(Business Office 562-907-4207)

You will be giving your proxy access to the following information by selecting these pages:

Statement – Proxy will be able to view and print your latest Billing Statement. Also view and reprint any past statements, payment history and recent tuition account activity.

Make Electronic Payment – Proxy will be able to make a credit card or ACH “e-check” payment through the Sallie Mae One Time Payment Gateway Site.

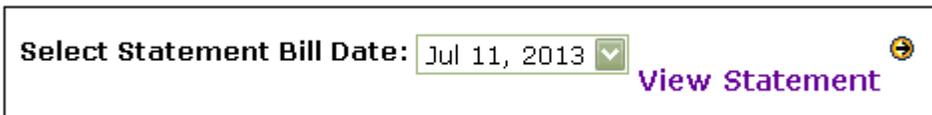
Tax Notifications – Proxy can view and reprint 1098T Tuition Tax Statement Information. They will also have access to past years if applicable.

### Where can I view and print my tuition billing statement?

Log into your my.whittier.edu account and click on the My Info tab. Located in the left column of the screen, you will find the **My Statement** channel. Click on the Statement and Payment History link.



You will be taken to the ALL screen of your Statement and Payment History page where from the drop down menu, select a Statement Bill Date and click **View Statement**. The billing statement will open in a printable PDF file.



### Where can I view my past tuition billing statements?

From the Statement and Payment History page, you will have access to 6 months of billing statement history. Just click on the down arrow next to **Select Statement Bill Date** to select a past statement from the drop down menu. Then click **View Statement**.

### Where can I see payment history for my tuition account?

You will have access to view 12 months of payment history. From your Statement and Payment History link located in the My Statement box, you will be taken to the ALL screen. Here, any payments made in the last 12 months will be listed.

### Payments since Aug 01, 2012

Post Date	Term	Description	Amount	Bill Date
Jan 02, 2013	Spring 2013 - Whittier College	Check Payment	\$42.00	Feb 19, 2013
Aug 01, 2012	Fall 2012 - Whittier College	Check Payment	\$100.00	Oct 15, 2012

### What is “Unbilled Activity” on my tuition statement screen?

This section contains information about activity (credits and charges) posted to the tuition account since the last statement was generated. Example: Last Billing Statement was generated on July 11, 2013 and two payments have been credited to the account on July 15<sup>th</sup> and August 7<sup>th</sup>. These credits will be reflected on the August Billing Statement.

### Unbilled Account Activity

Effective Date	Term	Description	Charge	Payment	Post Date
Aug 07, 2013	Fall 2013 - Whittier College	Check Payment	\$500.00		Aug 07, 2013
Jul 15, 2013	Fall 2013 - Whittier College	Check Payment	\$500.00		Jul 15, 2013

### Where did my Account Summary information go?

You still have access to view the information that used to be displayed in your Account Summary channel. When viewing the **Statement and Payment History** page, at the bottom of the page, will be a link to view your Account Summary information. Please note that when viewing your Account Summary information, anticipated Sallie Mae Monthly contract payments, financial aid, and memos are NOT included until they are posted to your tuition account.

[ [Account Summary](#) | [Account Summary by Term](#) | [Account Detail for Term](#) ]

### How do I make an electronic payment for my tuition account?

#### 1. How to make an electronic payment:

You must enable Pop-Ups for the website “my.whittier.edu” for your web browser. Step 5 will not work if Pop-Ups are not enabled. Please do so before starting the process.

- Log into [my.whittier.edu](http://my.whittier.edu)
- Click on the **My Info** Tab.
- In the Make Online Payment Box, click the **Make Online Payment** link.
- Next, you’ll be asked to **Select a Term** from the drop down menu. **\*\*Be careful which term you select or the payment will not credited correctly to your account.** View Only Terms can be selected. Then click the **Submit** button.
- The **One Time Payment Gateway** page will open in a new window where you can enter in your payment information.
- Your electronic payment will reflect on the tuition account within 24 hours.

#### 2. Other payment options available [HERE](#)

### What type of bank accounts can be used to make one-time electronic payments?

- Checking Accounts
- Savings Accounts
- Credit / Debit Cards: Visa, Master Card, American Express, Discover

### What is a 1098-T Tax Statement?

The information contained in the 1098-T will help you to determine if you may claim the Hope or the Lifetime Learning education tax credits. No Whittier College employee may give tax advice regarding these credits. If you are unsure about your eligibility, please consult with a qualified tax preparer. Whittier College will send a paper statement to you via US Postal Service by January 31<sup>st</sup>.

### Where can I get a copy of my 1098-T Tax Statement?

- Log into [my.whittier.edu](http://my.whittier.edu) account
- Click the **My Info** Tab
- In the **Self-Service Box**, expand the **Self Service Links**
- Click on **Students** Folder
- Click on **Student Account** Folder
- Select **Tax Notification** and select the desired year

### Can I get copy of last year’s 1098-T Tax Statement?

Yes, please follow the same steps to “Get a copy of my 1098-T Tax Statement”. For step 6, you can enter in a year you desire.

## Why didn't I receive a 1098-T Tax Statement?

There are several possibilities:

1. You are looking for your 1098-T at the wrong address.  
IRS regulations require mailing your 1098-T to your permanent address, not your local or campus one. Check at home to see if your family received the form.
2. Your 1098-T was mailed to the wrong address.  
If you did not have a current address on file with the College, then your form may have gone astray. You may obtain copies of your 1098-T through your my.whittier.edu account at your convenience. Remember to update your addresses with Whittier College.
3. You were a visa student who did not have a valid Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) on file.  
IRS regulations specify that the College is not required to issue a 1098-T in this situation, unless the student requests the form.

## Did you send a copy of my 1098-T form to the IRS?

Yes, Whittier College is required to file information returns to assist taxpayers and the IRS in determining eligibility for the Hope and Lifetime Learning Education tax credits. The annual deadline for Whittier College to file the required tax information is January 31<sup>st</sup>.

## What information is reported on the 1098-T Tax Statement?

Whittier College reports the name, SSN and address of the student, and indicated whether the student was a graduate student or at least half-time during the calendar year. Institutions are required to report either the payments received for qualified charges or the amounts billed for qualified charges. Whittier College does not identify payments on your student account with specific charges, therefore, Whittier College reports amounts billed.

Beginning in tax year 2003, education institutions must also report amounts to the IRS pertaining to qualified tuition and related expenses, as well as scholarships and/or grants, taxable or not. If you qualify for an education credit, you should use your personal records and student account statements to determine the amounts that you actually paid toward the charges reported on the 1098-T. We are required to report all qualified transaction in the actual calendar year during which they were posted to your account, regardless of when you pay them.