

## Commonly Asked Questions about IRS Form 1908T

### **Q. What is Form 1098T?**

IRS Form 1098T Tuition Statement is an informational statement required by the IRS to be issued by the eligible educational institution that the student attends. To assist the student and the IRS in determining if the student qualifies for the tax benefits available, the school is required to provide information on the 1098T regarding the amount of tuition and fees billed to the student, scholarships and grants received for the student by the University, whether the student was enrolled at least-half time at some point during the tax years, and whether the student was exclusively a graduate student.

### **Q. When will I receive my 1098-T?**

Your 1098-T paper form will be mailed by January 31, 2017. If you have moved recently or have an updated address, please make sure that you contact the University to provide the correct mailing information.

### **Q. Which terms apply to the 1098T for the 2016 year?**

Winter 2015 if it was not included in the 2015 1098T, spring 2016, summer 16/17 and fall 16/17. If you were registered for winter term for 16/17 in December 2016, it will also be included as long as it was not the only term you were registered for.

### **Q. I was registered for classes but they are not showing on my 1098T?**

If you enrolled but dropped your class, it will not reflect on your 1098T even if you paid for it. If you did not receive a grade, it will not show on your 1098T.

### **Q. How can I find out what I actually paid to City University?**

Logon to the City University portal, and go to your financial account. There will be a link to click on labeled: Show Tax Year 2016 which will give you an audit trail of your account for 2016. You can print directly from the portal.

### **Q. How can I find out if I am eligible for a tax benefit?**

Read [IRS Publication 970](#), contact the IRS at (800) 829-1040, or contact a tax advisor for information on how to determine if you qualify for one of the tax benefits.

### **Q. I think I should have received a 1098T, but did not get one. What should I do?**

Contact the Business Office at 1-800-426-5596 extension 3488 for 1098T questions or email [billing@cityu.edu](mailto:billing@cityu.edu). If we do not have your correct address, please email us with the correct address and phone number in order for us to send you a duplicate. Please note: if you did not provide us with your social security number, we cannot produce a 1098T form. Please contact the Registrar's Office to update your social security number.

### **Q. Since I received Form 1098T from the University, will I qualify for one of the tax benefits?**

Not necessarily. Read [IRS Publication 970](#), contact the IRS at (800) 829-1040, or contact a tax advisor for information on how to determine if you qualify for one of the tax benefits. The University is required to send 1098T forms to all students who have been billed for qualified tuition and related expenses except waivers.

**Q. Do the (Amounts Billed) figures in Box 2 of my 1098T equal the (Qualified Expenses) I can claim on my IRS FORM 8863 as I file my taxes?**

Not necessarily. The University is required to provide the (amounts billed) and (scholarship or grant) figures to help you determine the amount of qualified expenses you can claim on your [IRS Form 8863](#). You will need to review your payment records to determine the actual qualified expenses paid. Remember that qualified amounts paid by student loans may count as payments eligible for these purposes. Scholarships and grants received may reduce your eligible payment amounts. See [IRS Publication 970](#) for information to determine your qualified expenses paid amount.

**Q. How did the University determine what figures to include in Form 1098T Box 2 Amounts billed for qualified tuition and related expenses?**

The figure in Box 2, Amounts billed for qualified tuition and related expenses includes the total amount BILLED of tuition and tuition related fees posted to your account in the 2016 calendar year according to the terms explained above.

Non-qualified expenses are defined as application fees, late fees, books/supplies, interest charges, student health insurance, ESL courses, postage, transcripts, and any other non tuition related fees. The IRS does not provide clear guidance on the qualified status of application fees. City University does not include application fees in qualified expenses. If you have any questions, please consult your tax advisor.

**Q. How did the University figure out what amounts to include in Form 1098T Box 4 Scholarships or grants?**

The figure in Box 4 Scholarships or grants includes all scholarships or grants.

**Q. What are 1098T Boxes 3 and 5?**

Any adjustments made to your account in the current year which would have affected the previous year 1098T amounts are included in these boxes.

**Q. My Form 1098T contains incorrect information. How can this be corrected?**

Contact the Business Office by email; [billing@cityu.edu](mailto:billing@cityu.edu) and explain what information you feel is incorrect. If Form 1098T does contain incorrect information, a corrected form will be issued. You can also call us at 1-800-426-5596 extension 3488.

**Q. Can I receive an electronic version of my 1098-T?**

You can view and print your 1098-T tax form from our website. This is a more secure way of getting your forms quicker than receiving them in the mail. The online 1098-T form will be available mid-January, 2017. In an effort to be more environmentally conscious City University of Seattle provides students with the option to receive their 1098-T tax form online.

To sign up and view your 1098T, go to [my.cityu.edu](http://my.cityu.edu), you will be directed to our new City University of Seattle portal, login to access the student center and look for the "View 1098T Data" link, click the link and follow the instruction to give consent to view your tax information electronically. If you choose not to receive your 1098-T electronically, paper forms will be mailed on January 31, 2017.