

1098-T FORM Frequently Asked Questions

| Question | Answer |
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| 1. What is the 1098-T Form, and why did I receive one? | The 1098-T Form is used by eligible educational institutions to report financial information about its students to the IRS as required by the Taxpayer Relief Act of 1997. Institutions are required to submit to the IRS a student's name, address, taxpayer identification number (TIN), enrollment and academic status and their qualified tuition and related expenses, as well as scholarships and/or grants, taxable or not. The 1098-T must also be mailed to each eligible student unless he or she consents to receive an electronic version only. |
| 2. Why didn't I receive a 1098-T? | Students who receive grants and/or scholarships and/or veteran benefits that exceeded assessed fees in the calendar year will not receive a 1098-T Form. If no Social Security Number is on file, a 1098-T Form can not be issued. |
| 3. Where can I go to view my 1098-T? | Login to 'My Fresno State' portal at my.csufresno.edu . Go to Student Self Service>Student Center> 1098-T Detail Inquiry link under Finances. A student can also indicate at the 1098-T Print Option Inquiry if they do not want a 1098-T Form mailed to them. |
| 4. Why is the format under 1098-T Detail Inquiry different than the format on my 1098-T Form? | The 1098-T Detail Inquiry provides a printable electronic version of the same information as the mailed 1098-T Form. Either is acceptable pursuant to IRS regulations. |
| 5. Where can I obtain more detailed information regarding the reported amounts on a 1098-T Form? | Login to 'My Fresno State' portal at my.csufresno.edu . Go to Student Self Service>Student Center> 1098-T Detail Inquiry link under Finances. Use the Box 1-6 Details link on the 1098-T Data view. |
| 6. Why aren't there amounts in both Box 1 and Box 2 on the 1098-T Form? | Institutions may elect to report either the aggregate amount of payments received for qualified tuition and related expenses (Box1), OR the aggregate amount <u>charged</u> for qualified tuition and related expenses (Box 2) during the calendar year with respect to individuals enrolled for any academic period. California State University, Fresno reports amount billed in Box 2. |
| 7. What educational expenses are considered as qualified tuition and related expenses as reported on Form 1098-T? | Qualified tuition and related expenses, for a given calendar tax year, are tuition, registration and course fees required for enrollment or attendance at an eligible educational institution assessed between January 1 st and December 31 st of that year. Amounts <u>not</u> reported on a 1098-T include: books, room and board, student activities, athletics (unless the course is part of the degree program), insurance, equipment, transportation, or similar personal living and family expenses. |
| 8. Who can I contact for further information? | The University 1098-T help line is 278-6142. This number is voicemail only, and calls will usually be returned within 2-3 days. The University can only answer questions related to amounts provided in Form 1098-T and why someone may not have received a form. For a quicker response, you can send an email to 1098T@csufresno.edu The University cannot provide tax preparation information. The IRS website, www.irs.gov , provides further detailed tax guidelines and information. |
| 9. Where can I view the transactions from my account if I have not received a Form 1098-T? | Login to my.csufresno.edu and go to Student Self Service>Student Center. On the Student Center screen click on Account Inquiry under Finances, then click on the "Activity" tab along the top. On that screen, change the date ranges to 01/01/2011 and 12/31/2011 and then select "All Terms" and click on the "GO" button, and then click on "View All". This can help you determine if grants and/or scholarships exceeded assessed fees for the calendar year. |