

1098-T FORM Frequently Asked Questions

Question	Answer
<p>1. What is the 1098-T Form, and why did I receive one?</p>	<p>The 1098-T Form is used by eligible educational institutions to report financial information about its students to the IRS as required by the Tax Payer Relief Act of 1997. Institutions are required to submit to the IRS a student's name, address, tax payer identification number (TIN), enrollment and academic status and their qualified tuition and related expenses, as well as scholarships and/or grants, taxable or not.</p>
<p>2. What educational expenses are considered as qualified tuition and related expenses as reported on Form 1098-T?</p>	<p>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 1st and December 31st of that year. Amounts <u>not</u> reported on 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.</p>
<p>3. Why aren't there amounts in both Box 1 and Box 2 on the 1098-T Form?</p>	<p>Institutions may elect to report either the aggregate amount of payments received for qualified tuition and related expenses (Box1), OR the aggregate amount charged 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.</p>
<p>4. Why didn't I receive a 1098-T in the mail?</p>	<p>The Statement of Student Financial Responsibility included an agreement to receive the Form 1098-T electronically.</p>
<p>5. Where can I go to view my 1098-T?</p>	<p>Login to 'My Fresno State' portal at my.fresnostate.edu. Go to Student Self Service/Student Center/My Finances/View 1098-T. Use Box 1-6 Details link on the 1098-T Data View.</p>
<p>6. Where can I obtain more detailed information regarding the reported amounts on a 1098-T Form?</p>	<p>Login to 'My Fresno State' portal at my.fresnostate.edu. Go to Student Self Service/Student Center/My Finances/View 1098-T. Use Box 1-6 Details link on the 1098-T Data View.</p>
<p>7. Where can I view the transactions from my account?</p>	<p>Login to my.fresnostate.edu and go to Student Self Service/Student Center/My Finances/Account Inquiry, then click on the "Activity" tab along the top. On that screen, change the data ranges to 01/01/20XX and 12/31/20XX 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.</p>
<p>8. Who can I contact for further information?</p>	<p>The University 1098-T help line is 559-278-6142. This number is voicemail only, and calls will usually be returned within 1-3 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.</p>