

Form 1098-T FAQs

What is a Form 1098-T?

The Internal Revenue Service (IRS) requires SFA to issue Form 1098-T, *Tuition Statement*, to certain students. The 1098-T reports qualified tuition and related expenses (QTRE) as defined by the IRS, and provides information necessary to determine eligibility for federal education tax credits.

Form 1098-T is an informational form and may not match personal payment records or the amounts taxpayers should enter on their tax returns. Taxpayers may have made QTRE payments that are not on Form 1098-T, such as those for required books and supplies. It is the taxpayer's responsibility to report actual QTRE payments made during the calendar year to the IRS.

In 2017 and before, the amount reported in Box 2 of the 1098-T was the QTRE ***billed*** by SFA to the student's account during the calendar (tax) year. Due to changes in IRS reporting requirements beginning with the 2018 year, Box 2 is no longer used. Instead, Box 1 is used to report the amount of QTRE ***paid*** between January 1-December 31 for that year's semesters/terms. Therefore, QTRE payments received by SFA from January 1-December 31, 2018, for 2018 semesters/terms are reported in Box 1 of the 2018 Form 1098-T. (Payments made during 2018 but applied to previous- or future-year semesters/terms are not included.) There was no change in reporting requirements for Box 5, which is the total of scholarships, grants and contracts processed by SFA and posted to the student's account during the calendar year.

Note: not every student is issued a Form 1098-T. For example, a student who has scholarships and/or grants that fully cover the amount of their QTRE does not receive a 1098-T.

To insure the information SFA reports to you and the IRS is correct, verify your **Permanent** address as it will appear on Form 1098-T:

- login to mySFA
- under the HOME tab, scroll down to MY CONTACT INFO (on right side of page)
- select Update Address & Phone
- view your **Permanent** address as it will appear on your Form 1098-T
- if any corrections or revisions are needed, click Current, make the changes, and click Submit.

How can I receive my Form 1098-T by mail, rather than electronically?

By registering for classes online, you automatically consent to receive your 1098-T online. You may withdraw your consent to receive your 1098-T electronically at any time by contacting the SFA Business Office. (See "How can I withdraw my consent to receive my 1098-T electronically", below.)

When will the Form 1098-T be available?

- **Students who consent to receive Form 1098-T electronically:**

By registering for classes online, students consent to receive their 1098-T online. Students who are issued a 1098-T have access to it online no later than January 31 for the prior tax year. Once the form is available, an email is sent to applicable students' SFA Jacks accounts notifying them of its availability and instructions on how to access it through mySFA. Students will not receive their 1098-T via mail unless they withdraw their consent to receive it electronically. (See "How can I withdraw my consent to receive my 1098-T electronically", below.)

- **Students who withdrew their consent to receive Form 1098-T electronically:**

A paper copy of IRS Form 1098-T will be mailed to these people by January 31.

How can I withdraw my consent to receive my 1098-T electronically?

You may withdraw your consent and receive a paper Form 1098-T by providing written notification to the SFA Business Office via email at businessoffice@sfasu.edu, or by mail at Box 13053, Nacogdoches, TX 75962, or in person at the Business Office, Room 204 of the Austin Building, during normal working hours.

How do I view and print my 1098-T?

The Form 1098-T is accessible through mySFA. To access it:

- Login to mySFA
- Click the BILLING tab
- Under TAX INFORMATION, click 1098-T
- Enter a Tax Year (20xx)
- Click Submit

How do I view and print my 1098-T for previous years?

The current year form, plus forms back to 2011 are available to view and print through mySFA. Follow the instructions under "How do I view and print my 1098-T?", above.

Former students who do not have access through mySFA may request a duplicated 1098-T. Follow the instructions under "How do I request a duplicate 1098-T?", below.

How do I request a duplicate 1098-T?

A duplicate 1098-T may be requested by completing the [1098-T Duplicate Request Form](#) and following the instructions on the form.

Can parents/guardians have online access to my 1098-T?

No, only students have access through mySFA.

Why are the amounts on my 1098-T different from the amounts I paid SFA?

This is a common question. Qualified tuition and related fees (QTRE) reported on the 1098-T are defined by the IRS. The IRS does not consider fees such as room and board, post office box rental, and parking fines as QTRE. Therefore, they are excluded from amounts reported on the 1098-T. Additionally, amounts reported on Form 1098-T include only payments made during the year for that year's semesters/terms. Payments applied to previous- or future-year semesters/terms are not included.

I have more questions. How can I get them answered?

- **Help from SFA:**

Please contact the SFA Business Office:

Phone: (936) 468-6960

Email: businessoffice@sfasu.edu

In person: Room 204, Austin Building

SFA Business Office hours are Monday-Friday, 8:00 a.m.-4:30 p.m.

- **Help from the IRS and your tax advisor:**

To see if you qualify for federal education tax credits or deductions, and for help in calculating the amounts, see IRS Pub. 970, *Tax Benefits for Education*; IRS Form 8863, *Education Credits*; and IRS Form 1040, *U.S. Individual Income Tax Return*, instructions. Also refer to your own records or contact your tax advisor. SFA does not provide tax advice.

Updated February 2019