

Sul Ross State University

Form 1098-T: Information for Students

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1. What is Form 1098-T?

Form 1098-T, "Tuition Statement" is used to report information to the IRS as required by the Taxpayer Relief Act of 1997. The form helps you and the IRS to determine your eligibility to claim certain tax credits

(see IRS Publication 970, "Tax Benefits for Education" for more information (www.irs.gov)). SRSU is required to make the form available to students no later than Jan. 31st each year summarizing payments received and scholarships/grants awarded during the previous year.

An official Form 1098-T is only filed with the IRS if the total of all payments received for “qualified tuition and related expenses” exceeds the “scholarships and grants” awarded to you during the year. Thus, if the amount of scholarships and grants you received completely paid for your qualified tuition and related expenses during the year, SRSU will not report the information to the IRS. Please note that not all charges on your account are considered to be “qualified tuition and related expenses.” Common examples are room and board, medical fees, and optional fees not required of all students to attend classes. Please visit www.irs.gov to review IRS Publication 970, Form 1098-T Instructions, and/or consult your tax advisor if you have questions regarding your Form 1098-T.

2. Required Information from Students

Social Security Number (SSN) / Individual Taxpayer Identification Number (ITIN):

The IRS requires universities to file Form 1098-T using your Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN). Students who fail to provide the University with a valid SSN/ITIN will be subject to an IRS imposed "penalty of \$50 unless your failure is due to reasonable cause and not to willful neglect". See "Penalties" on IRS form W-9S, "Request for Student's or Borrower's Taxpayer Identification Number and Certification" for more information. To update your SSN/ITIN, complete a “Change of Information” form and return it to the appropriate office listed on the form *:

Alpine: <http://www.sulross.edu/page/1005/forms-students>

Uvalde/Del Rio/Eagle Pass: <http://www.sulross.edu/page/2180/student-and-faculty-forms>

* Students who were employed by the University during the year and are expecting to receive a form W-2, “Wage and Tax Statement” should contact Human Resources instead.

Permanent Address:

The IRS requires universities to use the “student’s permanent address” such as the “student’s home or other long-term address”. It is especially important for students who are no longer enrolled at SRSU to maintain a current address in LoboOnLine to ensure they will receive their final Form 1098-T. See Appendix B, “Update Your Address and Alternate Email in LoboOnLine” for detailed instructions including the order in which the different address types are selected by the software.

3. Viewing and Printing Form 1098-T

The electronic version of the form is located in two places on LoboOnLine. The “traditional” form is found under “Student Account Suite (Bill + Payment).” A detailed version of the form listing the payments, charges and scholarships appearing in each box is found under “Student Records”. Electronic versions are

provided for your records even if SRSU does not report your information to the IRS (see FAQ #5). Please see Appendix C, “Printing the form” for more information.

4. Frequently asked Questions (FAQ)

Q#1: Am I required to provide SRSU with my Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) for use on the Form 1098-T?

A#1: Yes (see topic #2, “Required Information from Students”). If SRSU is required to issue a form to you and you fail to provide a SSN or ITIN, “you are subject to a penalty of \$50 unless your failure is due to reasonable cause and not to willful neglect” (Non-resident aliens see FAQ #20).

Q#2: How do I verify that SRSU has my correct SSN on file?

A#2: If you have elected for electronic delivery of your 1098-T, you can see your SSN on the form when you login to Bill+Payment. If the SSN is incorrect, complete the “Change of Information” form as soon as possible (see topic #2, “Required Information from Students”). SRSU files the information with the IRS in late March. Corrections must be received no later than March 5th.

Q#3: Do I need an ‘official’ copy of the form before I can file my taxes?

A#3: No. The IRS allows universities to supply students with alternatively formatted statements. You may use the form printed from Bill+Payment for your records. You are not required to submit the form with your tax return.

Q#4: I received an email that said my “tax status” was “S”. What does this mean?

A#4: The University has generated your Form 1098-T and this information will be reported to the IRS. A paper form will be mailed to you no later than Jan. 31st. However, the paper form is not required for you to complete your tax return (see FAQ #3).

Q#5: I received an email that said my “tax status” was “E”. What does this mean?

A#5: You did not meet the conditions necessary to receive a Form 1098-T this tax year. The IRS does not require universities to provide the form to students if the total in Box 5 “Scholarships and grants” is greater than Box 1 “Payments received for qualified tuition and related expenses”. However, SRSU is providing you with an electronic version even if you did not agree to receive the form electronically. This is done as a courtesy only. Paper copies will not be mailed and the information will not be reported to the IRS.

Q#6: I did not receive an email with my “tax status”, why?

A#6: Emails are sent automatically to your SRSU email account. The most likely reason for not receiving the “status” email is that you did not have any activity during this tax year. First, follow the instructions in Appendix C to see whether or not your form is available on the website. If not, see FAQ #8 to review your account. In addition, you will not receive a form if you did not provide a SSN and you are a non-resident alien or your tuition bill was paid by a third party.

Q#7: I did not receive the form in the mail, why?

A#7: Some common reasons for not receiving the form in the mail include:

- You selected the “paperless” under LoboOnLine “Student Account Suite (Bill + Payment)”.
- You were not eligible to receive the form this year (see FAQ #5).
- Your mailing address is incorrect (see Appendix B)

See FAQ #22 to request a duplicate form.

Q#8: I went to the website but the form for this tax year is not listed, why?

A#8: The most likely reason is that you did not have any reportable activity during the calendar year. Login to LoboOnLine and go to the “Student Account Suite (Bill + Payment)” option. Once you are redirected to the “[Bill + Payment]” website, click “My Account” on the upper menu bar and select the “Payment History” option. Select “Date range” and enter Jan. 1st through Dec. 31st of the tax year in question. If no payments are listed, there was nothing to report and you will not have an electronic form. If you still believe a form should have been uploaded to the website, please follow the instructions in FAQ #23 to send an email explaining your issue.

Q#9: My Authorized Users receive an error when they try to open the form, why?

A#9: You must grant each user his/her own access to the form. See Appendix A to verify that you have the correct settings for each user. Also, authorized users only have access to the “traditional” version of the form, not the “detailed” version listing payments, charges and scholarships (see Appendix C).

Q#10: The amount in Box 1 is too low. Why are some payments not included?

A#10: Per IRS regulations, the amount reported as “payments received” is limited by the amount of “qualified tuition and related expenses” posted to your account. Payments for non-qualified charges such as room & board or medical fees are not included in the total. See IRS Publication 970 for more information on “qualified tuition and related expenses.” See Appendix C for instructions to view the payments, charges and scholarships included on the form.

Q#11: The amount in Box 1 is too high. Why does it include payments not made by me?

A#11: The “payments received” amount includes more than just your cash/credit card payments. It includes payments from all sources less refunds issued to you. Most “scholarships and grants” reported in Box 5 are reported as payments in Box 1. Exemptions and waivers are reported as payments if they are also reported in Box 5 (see FAQ #17). Loans received from outside sources (e.g. U.S. Dept. of Education, Texas B-On-Time) are included in Box 1 as well as other payments received from third parties (e.g. employers, school districts). For this reason, it is the responsibility of the tax payer to determine which payments can be claimed on his/her tax return. Please see IRS Publication 970 and/or consult with your tax advisor if you have questions. See Appendix C for instructions to view the payments, charges and scholarships included on the form.

Q#12: I made a late payment for a Term in 2017 or earlier but it is not showing this year in Box 1, why?

A#12: For tax years 2017 and earlier, SRSU was reporting to the IRS using the “charges billed” method, not “payments received” (i.e. amounts were reported in Box 2 while Box 1 was empty). In 2018 the

IRS required all universities to report using Box 1. However, this change was not retroactive. Thus, any new activity related to 2017 or earlier is still reported using the “charges billed” method. This means payments made this year will not appear in Box 1, but adjustments to scholarships may appear in Box 6. You may still be able to claim a deduction even if the payment is not shown on the 1098-T. Please see IRS Publication 970 and/or consult with your tax advisor if you have questions.

Q#13: I downloaded my Form 1098-T for tax year 2017 or earlier. Box 1 is empty, why?

A#13: SRSU did not begin reporting payments received in Box 1 until 2018 (see FAQ #12). You may obtain a list of payments for prior tax years by following the steps in FAQ #8. The IRS did not require the restatement of old Form 1098-Ts using Box 1 because, regardless of the tax year, it is always the tax payer’s responsibility to properly document payments and claim an appropriate deduction on the individual’s tax return (see FAQ #14).

Q#14: Does this form establish “proof of payment” for an IRS audit?

A#14: NO! Although SRSU cannot provide individual tax advice, students who have been audited in the past have reported that they needed to provide records such as bank/credit card statements, loan agreement/disbursement records, etc. SRSU recommends that you keep copies of your “Billing Statements” as well as download your “Current Activity” screens by Term (all found on the Bill+Payment website) to assist you with this process. Please see IRS Publication 970 and/or consult with your tax advisor to ensure that you have proper documentation.

Q#15: I did not receive any scholarships/grants, why does Box 5 show a positive amount?

A#15: See FAQ #17 regarding exemptions and waivers. In addition, certain forms of federal aid (e.g. VA payments, AmeriCorps) may be included in Box 5 as required by the IRS.

Q#16: How do I know which payments, charges and scholarships have been reported on the form?

A#16: You can review a summary of the amounts included on the form by logging into LoboOnline. See Appendix C for more information.

Q#17: How are exemptions and waivers reported on the form?

A#17: Exemption and waivers appear in Box 1, “Payments Received” and in Box 5, “Scholarships and grants”. In effect, the State of Texas or SRSU has paid the required charges on your behalf. Thus, they are treated the same as other scholarships and grants. The most common examples include the Hazlewood Exemption, Distance Learning Exemption and Concurrent Waivers.

Q#18: The amounts on the form are wrong. How can I get them corrected?

A#18: The amounts on the form will NOT be changed. Exceptions may be made only for the following:
1. You find an error on your student account. This means specifically that there is a transaction(s) on your “Current Activity” screen that is incorrect (located under the “My Account” menu on the Bill + Payment website). It does NOT mean that you think the transactions are being reported incorrectly on the form. If you do find an error, contact Customer Service to have your account corrected. Once corrected, Customer Service will refer you to Accounting Services to have your 1098-T corrected.

2. You have a detailed analysis of the transactions on your “Current Activity” screen and you or your tax advisor can cite a specific IRS regulation, IRS Revenue Bulletin or other authoritative ruling supporting your claim that the transaction is misclassified. Please email all the relevant documents to cashiers@sulross.edu and reference your “A” number. Accounting Services will contact you to discuss your account.

Q#19: I am graduating, transferring or just leaving school. How do I get my final 1098-T from SRSU?

A#19: Former students and their Authorized Users can continue to access LoboOnLine even after leaving school. Students and authorized users should keep their login information in a safe place to access LoboOnLine in January when the form is uploaded. Choosing electronic delivery is the most reliable method for receiving your form after leaving school. However, former students also need to maintain a current address if the form is to be mailed (see Appendix B and Appendix C).

Q#20: Does Form 1098-T reporting apply to non-resident aliens?

A#20: No. Non-resident aliens who do not need to file a U.S. income tax return do not need a Form 1098-T and are not subject to penalties for failing to provide a SSN/ITIN. However, if you would like to receive a Form 1098-T for any reason, simply make sure your SSN/ITIN is on file (see topic #2, “Required Information from Students”). A Form 1098-T will be generated automatically for any non-resident alien with a SSN/ITIN on file. If you submit your SSN/ITIN after the forms were generated, email the Cashier’s Office to request the form (see FAQ #22).

Q#21: The electronic form is showing my last name first and first name last.

A#21: The electronic version of the form does not always print the comma separating your last and first names. You can verify that your name is correct in Bill+Payment by selecting the “Personal Profile” option from the menu bar down the right side of the screen. In addition, your name is shown on the main menu of LoboOnLine when you first login (look for “Welcome [*your name*]”). If your name truly is incorrect, complete the “Change of Information” form referenced in topic #2, “Required Information from Students”.

Q#22: I cannot print the form or I have not received the form. How do I request a duplicate?

A#22: Duplicate paper copies will not be sent. Students are expected to follow the instructions in Appendix C to print the electronic version. If you cannot remember your “A” number or PIN, please read “Form 1098-T How to find your A number and PIN” on the Cashier’s Office webpage (<http://www.sulross.edu/page/902/cashiers-office>). If you are unable to access LoboOnLine, see FAQ #23.

Q#23: Where may I get additional help?

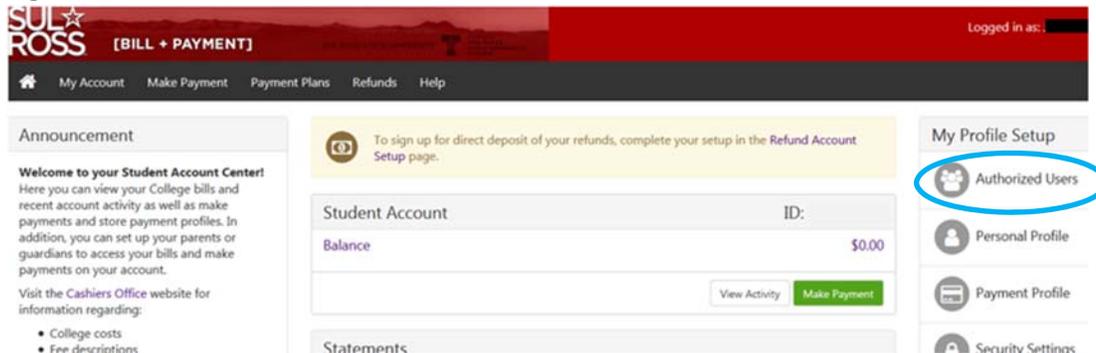
A#23: If you need assistance using LoboOnLine, contact the LTAC help desk at 432-837-8888. If you feel there is an error in the charges/payments on your student account, contact Customer Service at: Alpine (432) 837-8050; Del Rio (830) 703-4828; Eagle Pass (830) 758-5042 or (830) 758-5008; Uvalde (830) 279-3006.

If you have a question not answered in this FAQ, you may email the Cashier's Office with your name and "A" number (Alpine: cashiers@sulross.edu; RGC: rgc_cashiers@sulross.edu). Questions will not be answered in person or on the phone without a scheduled appointment. However, please remember that SRSU is not qualified to, nor does it provide tax advice to students. SRSU shall not be liable for damages of any kind in connection with the information provided in this document.

Appendix A: Form 1098-T Authorized Users

The following steps describe how to grant one or more of your authorized users access to your Form 1098-T. Users can be granted access to just the form and nothing else. This is helpful if you are using the services of a paid tax preparer. It is assumed that you have already logged into LoboOnLine (Banner Self Service). If you are having problems, see "How to Access Your Account" under the "Student Account Suite (Bill+Payment)" heading at the bottom of the Cashier's Office webpage (<http://www.sulross.edu/page/902/cashiers-office>).

Login to the "[Bill + Payment]" account page and click the "Authorized Users" option in the menu on the right.



A list of your authorized users will be displayed. Click the "Action" button on the right of the person you would like to change and click "edit". A menu will be displayed showing the access you have granted to this user. Click "Yes" on the option for 1098-T and click "Update User".

Edit Authorized User

Full name [REDACTED]
 Email address [REDACTED]

Would you like to allow this person to view your billing statement? Yes No

Would you like to allow this person to view your 1098-T tax statement? Yes No

Would you like to allow this person to view your payment history? Yes No

Cancel Update User

Full name	Email address	Action
[REDACTED]	[REDACTED]	

If you need to add a new user and have trouble, see "How to Designate an Authorized User," also found on the Cashier's Office webpage.

NOTE: Authorized users cannot see the “detailed” version of the form listing payments, charges and scholarships (see Appendix C).

Appendix B: Update Your Address and Alternate Email in LoboOnLine

The following steps describe how to ensure that your mailing addresses and your Bill+Payment alternate email are accurate. Students with inaccurate information may not receive their Form 1098-T. This is especially true for students who are no longer attending school after graduating, transferring, etc.

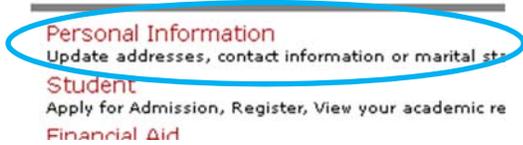
To add/update/delete your addresses:

01. Login to LoboOnLine by going to the SRSU homepage (<http://www.sulross.edu/>) and selecting “My SRSU” from the menu bar and choosing the “LoboOnLine (Banner Self Service)” option.
02. Click “Login” on the LoboOnLine loading screen. Enter your UserID (student “A” number) If you forgot your PIN, click the “Forgot PIN?” button to answer your security question and reset it. You can also lookup both your “A” number and PIN by following the instructions in “Form 1098-T How to find your A number and PIN,” located on the Cahier’s Office webpage. Otherwise, contact LTAC (Lobo Technology Assistance Center) at (432) 837-8888 or techassist@sulross.edu for assistance.

03. Click either the “Personal Information” tab or the link in the menu.



Main Menu



04. Click “Update Addresses and Phones” and/or “Update E-mail Address”.

Personal Information



05. To edit a current address/phone, click the red link. To add a new address, select the type from the drop-down and click the “Submit” button. The Form 1098-T uses the following address types in order of preference: **1. Permanent ***, 2. Local Mailing, 3. Mailing (employees only).

Addresses and Phones

Local Mailing Address	Phones
Current: Jan 07, 2016 to (No end date) 9999 N. Harrison Apt. #5 Alpine, Texas 54321	Primary: 222-1234567

Mailing Address	Phones
Current: Dec 30, 2015 to (No end date) 9999 N. Harrison Apt. 5 Alpine, Texas 54321	Primary: 222-1234567

Permanent	Phones
Current: Dec 30, 2015 to (No end date) 123 Main Street El Paso, Texas 12345	Primary: 111-1234567

Type of Address to Insert:

- Select
- Local Mailing Address
- Mailing Address

Check to ensure that your current address says “(No end date)” or has a date later than Jan. 31st (when the forms are mailed). If an end date is listed, then click the link to edit the address and edit the “Until this Date” field.

Mailing
Valid From This Date:MM/DD/YYYY 10/18/2007
Until This Date:MM/DD/YYYY
Address Line 1:

Detailed instructions for updating your Local address are found on the “Update Addresses and Phones” webpage by following the link for “Click HERE for detailed instructions on updating addresses in LoboOnLine” (see screen shot below).

Local Mailing Address (Students Only):

Your local mailing address is the address at which you receive mail. This may be a temporary Alpine address but could also be the same as your permanent address. This address can and should be updated in LoboOnLine as your mailing address changes. For instance, a student may elect to receive mail at a campus post office box during the fall and spring semester, but have mail go to a different address in the summer. [Click HERE for detailed instructions on updating addresses in LoboOnLine.](#)

*** NOTE REGARDING PERMANENT ADDRESS:** You cannot update your “Permanent” address using LoboOnLine. Instead, you must complete a “Change of Information” form as described on this same address/phone webpage (see screen shot below).

Sul Ross State University requires current mailing addresses for students, faculty, and staff. Below is a list of the various address types currently in use and how they are used by Sul Ross State University.

Permanent Address (Students Only):

Your permanent address is a mailing address at which you can be contacted indefinitely. This address was collected from your application for admission and may be a parent's address (although it does not have to be). This address can be viewed but not updated in LoboOnLine. Alpine students must submit a [Change of Information Form](#) to change the permanent address. Rio Grande College students must submit the [RGC Change of Information Form](#).

How this address is used:

- If a student does not elect to receive the 1098T electronically, Sul Ross will use this address for mailing of the 1098T (an important tax document).
- If a local mailing address is not provided or invalid, the permanent address will be used for official communication regarding your status at Sul Ross (see below).

Local Mailing Address (Students Only):

Your local mailing address is the address at which you receive mail. This may be a temporary Alpine address but could also be the same as your permanent address. This address can and should be updated in LoboOnLine as your mailing address changes. For instance, a student may elect to receive mail at a campus post office box during the fall and

06. Follow the same process to “Update E-mail Address”. Click on the link to change an existing email or select the type from the drop-down and click the “Submit” button to add a new email.

E-mail Addresses

Personal Email Address

hlobo@sulross.edu

Sul Ross Email (Non Updateable)

hlobo@sulross.edu Preferred

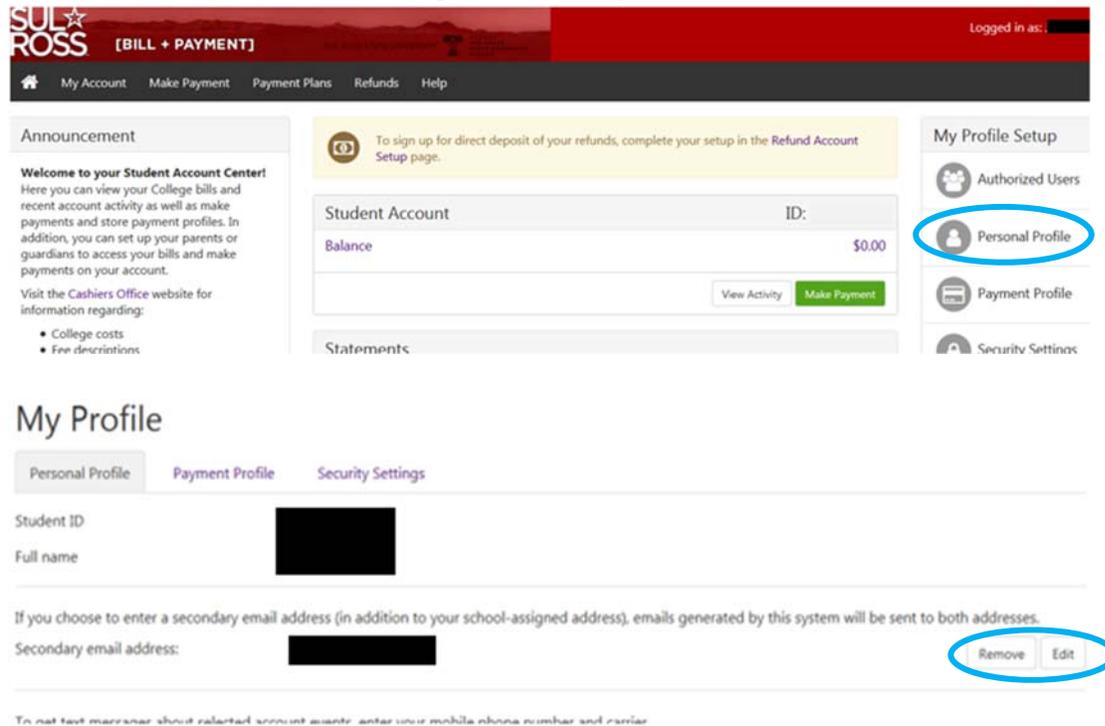
Type of E-mail to Insert: Personal Email Address

Submit

07. In addition, a stand-alone “Alternate email” is used exclusively by the Bill+Payment system to send emails when the Form 1098-T is uploaded and ready for you to view. Log into LoboOnLine, click the “Student” tab and then click “Student Account Suite (Bill+Payment)”. Next, click the “Continue to Student Account Suite” button to launch Bill+Payment. If you have problems, see "How to Access

Your Account" under the "Student Account Suite (Bill+Payment)" heading at the bottom of the Cashier's Office webpage (<http://www.sulross.edu/page/902/cashiers-office>).

Once in Bill+Payment, click the "Personal Profile" option from the menu bar down the right side of the screen. You will be able to add/update/remove your alternate email address on the next screen.



Appendix C: Printing the form

The following steps describe how to download/print the Form 1098-T. It is assumed that you have already logged into LoboOnLine (Banner Self Service). If you are having problems, see "How to Access Your Account" under the "Student Account Suite (Bill+Payment)" heading at the bottom of the Cashier's Office webpage (<http://www.sulross.edu/page/902/cashiers-office>). If you have forgotten your "A" number or PIN, see "Form 1098-T How to find your A number and PIN," also on the Cahier's Office webpage.

There are two versions of the form on LoboOnLine. The "traditional" version contains the official IRS language explaining the purpose of each box on the form. This version is found under "Student Account Suite (Bill + Payment)." A detailed version of the form listing the payments, charges and scholarships appearing in each box is found under "Student Records".

TRADITIONAL VERSION:

Login to LoboOnLine (Self-Service) and go to the "Student" screens to select "Student Account Suite (Bill + Payment)". Click "My Account" on the upper menu bar and select "Statements" from the drop-down list. Click on the "1098-T Tax Statements" tab that appears next. Click the "Action" button for the year you wish to download. Your browser should give you the option to open and/or save the file. If it does not,

make sure the browser is not blocking pop-ups. You may need to add one or both of these URLs to the browser's "trusted sites" list: <https://secure.touchnet.com/> and/or https://secure.touchnet.com/C20202_tsa/.

NOTE: If the "[Bill + Payment]" website terminates your session and displays the "Authorized Users log in here" sign-in page, you will need to close ALL of your browser windows before the security settings will reset. You'll need to login to LoboOnLine again and access the site using the "Student" and "Student Account Suite (Bill + Payment)" options. If your session terminated abnormally, you may need to restart your computer, clear your browser history and/or try a different web browser before the security settings will reset.

The screenshot shows the top navigation bar with the SUL ROSS logo and "[BILL + PAYMENT]" text. The "My Account" menu is expanded, highlighting "Statements" and "1098-T Tax Statements". Below the menu, a yellow warning banner reads: "Please make sure your browser's pop-up blocker is disabled before you view a statement." A table titled "1098-T Tax Statement" has two rows for the years "2015" and "2014". To the right of the table is an "Action" column with gear icons for each row.

DETAILED VERSION:

Login to LoboOnLine (Self-Service) and go to the "Student" screens. Select the "Student Records" option and then the "Tax Notification" option. You will be prompted to enter the 4-digit tax year to view the form (use the "Select tax year" option to make changes after your initial selection).

The screenshot shows the "Student" menu highlighted in the top navigation bar. Below the navigation bar, there is a search box and a "Go" button. The main content area is titled "Student" and includes a "Registration" section with the text "Check your registration status, class schedule and add or drop classes". Below this is the "Student Account Suite (Bill + Payment)" section, which contains a list of actions: "Check your balance.", "Make a payment towards your balance.", "View your payment history.", "Store your payment methods for quick and easy payment.", "As a student, provide permission to others (parents, employers, etc) to view your bill", "View and print your billing statement.", "Enroll in a payment plan so you can pay your balance in installments.", "View your current payment plan status.", "Make a payment toward one of your installments.", "Schedule future installment payments.", "Enter your bank account information so that refunds can be deposited into your acco". The "Student Records" option is highlighted in the bottom navigation bar.

Student Records

- [View Holds on Your Records](#)
- [Midterm Grades](#)
- [Final Grades](#)
- [Grade Detail](#)
- [View Your Academic Transcript](#)
Please review your record and let Registrar's Office know of a
- [Request Printed Transcript](#)
- [View Status of Your Transcript Requests](#)
- [Select Tax Year](#)
- [Tax Notification](#)
- [Course Catalog](#)
- [View Your Student Information](#)
- [Search for a Class in Schedule](#)

The details for payments, charges and scholarships are displayed by Term under the form. You will need sum the Terms to get the total. Note that Box 2, “Amounts Billed for qualified tuition and related expenses” is no longer printed on the form as discussed below.

Form 1098-T

FILER's name, address, and contact phone number Sul Ross State University PO Box C-500 Alpine, TX 79832 United States of America (432) 8378042		1 Payments Received 9,383.04	2018
FILER's Federal Id 746000027		2 Amounts Billed for qualified tuition and related expenses	
Student SSN *****	3 Check if reporting method has changed for 2018 <input type="checkbox"/>		
STUDENT's name, street		4 Adjustments	5 Scholarships 7,637.00
Service Provider/Acct. No. (opt)		6 Adjustments to Scholarships	7 Check if 2019 <input checked="" type="checkbox"/>
8 Check if at least half time student <input checked="" type="checkbox"/>	9 Check if a graduate student <input type="checkbox"/>		10 Reimbursements

Select links on the Tax Report Descriptions below to see additional detail which may be helpful in determining the amount to claim for Hope Scholar

Supplemental Information

Hard Copy Mailed: No

Detail of Payments Received

Term	Code Description	Amount	Pro-rata
201920	Spring 2019		
	CSHA Cash Alpine	\$500.00	
	Term Total:	\$500.00	
201910	Fall 2018		
	CSHA Cash Alpine	\$0.00	

Payments Received – It is likely that the detail for this section will exceed the amount reported in Box 1. As explained in FAQ #11, this section includes your cash/credit payments, scholarships, exemptions, loans and all other forms of ‘payments’ on your account, even if they were not applied directly to qualified tuition and related expenses. However, per IRS regulations, the Box 1 amount cannot be greater than the “Amounts Billed” (see below). Thus, many times the detail will be greater than what is ultimately reported in Box 1.

Amounts Billed – This amount was formally reported in Box 2 but is no longer used by the IRS. However, the calculation is important because it limits the payments reported in Box 1. This section does NOT contain all of the charges on your account, only those considered “qualified tuition and related expenses” (see section “1. What is Form 1098-T?”). A complete list of transactions, including non-qualified charges not shown here, can be found on the “Student Account Suite (Bill + Payment)” website by clicking on “My Account” on the upper menu bar and selecting “Current Account” from the drop-down list.

Scholarships and Grants – In addition to scholarships and other amounts received from Financial Aid, this section includes exemptions, waivers and some forms of federal aid (see FAQ #15). Note that nearly all of the items reported in Box 5 are also considered to be ‘payments’ in Box 1. Certain fellowships and other payments intended to cover personal living expenses while working on academic projects (i.e. research) may not be included. Please see IRS Publication 970 and/or consult with your tax advisor for the proper treatment of these payments on your tax return.

Adjustments – If your account included adjustments to payments or scholarships reported in a previous tax year, Box 4 and/or Box 6 will have an ‘adjustments’ section listing the items and Terms.