

1098-T Frequently Asked Questions

What is a Form 1098-T?

IRS Form 1098T is a Tuition Statement provided by higher education institutions to students to report scholarships, grants and other payments of qualified educational expenses, and this information may assist you or your parents in claiming certain educational tax benefits. This form is required to support any claim for an educational credit, so retain the form for your records.

What is reported on Form 1098-T?

Beginning with tax year 2018, USD is required to report payments of Qualified Tuition and Related Expenses (QTRE) received by the University. We report those payments, up to the amount of QTRE in Box 1. In all prior years, USD reported QTRE charges in Box 2. This change is required by the IRS effective with the 2018 tax year.

University of San Diego reports the following information to the IRS on Form 1098T:

BOX 1: Payments received during the year for Qualified Tuition and Related Expenses

BOX 2: Amounts billed for qualified tuition and related expenses. **No longer used.**

BOX 3: Checked if the school is changing its method of reporting

BOX 4: Indicates that there was a reduction in tuition bill during a prior year.

BOX 5: Amount of grants and scholarships applied to the student account during the year

BOX 6: Adjustments to scholarships and grants for a prior year

BOX 7: Checked if some portion of the amount reported in Box 1 relates to an academic period beginning in January – March 2022

BOX 8: Checked if the student was registered at least half-time during the year

BOX 9: Checked if the student was a graduate student during the year

When is my Form 1098-T available?

Students who elect to receive an electronic Form 1098-T may access their Form 1098-T via their My San Diego Portal under the My Student Account Page under Tax Documents by January 31st after each tax year.

How do I consent to receive my Form 1098-T electronically?

Your consent is required for electronic delivery of your 1098-T. Follow the steps below to consent:

- Click on the "opt-in" link below to receive their forms electronically is <https://heartland.ecsi.net/index.main.html#/access/eConsent>
- Complete all required fields on the "opt-in" link.
- Your student ID is your nine digit numeric ID. This is NOT your Social Security Number. Example: 001234567

Why am I receiving the following message?

Message: Cannot locate student (5a). Either try correcting your input or contact ECSI Customer Service.

If you received this message while trying to access your Form 1098-T, it means that a form was not generated because of the following reason:

There were no Qualified Tuition and Related Expenses to your student account during the calendar year which you were enrolled. For example, if you registered in November or December for the following Spring semester, those charges would be posted to your student account in the month of registration which would be included in the Form 1098-T for the prior year. If no other registration took place in your final year, other than Spring, there would be no Form 1098-T generated for that year.

Can I get a copy of the Form 1098-T for prior years?

Yes, you can access prior years from your Tax Documents section that is located on your My San Diego portal under the My Student Account page. If you no longer have access to the portal you can email onestop@sandiego.edu to request a paper copy be mailed to your mailing address on file. If possible please email from your USD Email or personal email on file (if you are an alumni or former student).

I'm a parent. Can I have my student's 1098-T form sent to me?

Students must make all information requests. The student is responsible for providing information to other parties in accordance with FERPA (Family Educational Rights and Privacy Act). <http://www.ed.gov/policy/gen/guid/fpco/ferpa/index.htm>

Why did I not receive a Form 1098-T?

There are several possibilities:

- You did not enroll in courses at USD during the January 1, 2021 through December 31, 2021 calendar year.
- Your paper copy of the Form 1098-T was mailed to the mailing address on record and returned by the Postal Service.

Remember to keep your contact information current in the MySanDiego portal as follows:

- Log into my.sandiego.edu
- Under My Torero Hub tab, click My Torero Services link
- Go to Personal Information and click Update addresses.
- Select the Edit box and update your mailing address information.

I am an international student, do I need a 1098-T form?

It depends on whether you are a non-resident alien for federal income tax purposes. Non-resident aliens are generally not eligible for educational tax benefits.

I am a recipient of a GI Bill paid by the VA. How are the GI Bill tuition and stipend payment amounts reported on a Form 1098-T?

Per IRS Publication 970, payments you receive for education, training, or subsistence under any law administered by the Department of Veterans Affairs (VA) are tax free. However, for U.S. tax reporting purposes, GI Bill recipients are issued a Form 1098-T from the University reflecting the total tuition and fee payments by multiple sources (including GI Bill paid by VA), not just items personally paid out-of-pocket. The amounts of GI Bill benefits designated for tuition and fees do not count as qualified payments against federal education tax credits.

For additional assistance, visit the Veteran's Affairs official [GI Bill website](#).

My address listed on the Form 1098-T has changed. Will this affect me?

No. The address shown on Form 1098-T is irrelevant for IRS income tax filing purposes. The single most important information on the form is your social security number.

The Social Security Number (SSN) on my Form 1098-T is missing or incorrect. What should I do?

Reporting to the IRS depends primarily on your social security number. It is very important for you to have the correct information on file with the University.

Follow these steps to have a corrected Form 1098-T generated:

Update your SSN with the USD Registrar's Office.

If you had a SSN number issued prior to Dec 31st we will update the information for the reporting period.

DISCLAIMER: The information on this page is general information only. We are not personal tax preparers and cannot give any personal tax advice. For tax preparation advice, please consult a tax advisor.

There is no IRS requirement that you must claim the education credit. Claiming education tax benefits is a voluntary decision for those who qualify.