Frequently Asked Questions Regarding the 1098-T Form
Tax Year 2013

Question: What is a 1098-T form?
Answer: This is a form used by all educational institutions to report financial information about their students to the Internal Revenue Service (IRS). This form will assist you in determining your eligibility for the Lifetime Learning education tax credit.

Question: Since I received a 1098-T form from the university, am I qualified for one of the educational tax credits?
Answer: Midwestern University cannot provide individualized information about how to file taxes and the amount of credit or deduction to claim. General information about eligibility and requirements can be found on the IRS web site at http://www.irs.gov. You should search for Publication 970, Tax Benefits for Education. You may also contact the IRS directly at 1-800-829-1040. Midwestern University strongly urges and advises you to seek expert advice from your tax advisor, personal accountant and/or the IRS. Please keep in mind that Midwestern University students do NOT qualify for the Hope Education Tax Credit because they have already completed at least two years of postsecondary education.

Question: How do I claim an education tax credit or deduction?
Answer: The form to use for claiming the Lifetime Learning tax credit with your federal taxes is IRS Form 8863. You can find information regarding the tax credits and deductions, along with links to obtain IRS Form 8863, by selecting “Form 8863” from the IRS web site at http://www.irs.gov.

Question: How can I obtain a copy of my 1098-T form for Tax Year 2013?
Answer: You can access your form electronically by logging into your MWUnet account. Click on the “Financial Services” tab at the top and then click on “1098-T” from the menu on the left hand side of the page. You may also print the form for your records.

Question: Will the 1098-T form be mailed to me or will I have to access it electronically?
Answer: Midwestern University will not mail 1098-T forms to students. All students billed during the 2013 calendar year will need to access their records via their MWUnet account. Midwestern University will mail a personalized letter to those students who have graduated, withdrawn or ceased to be enrolled in calendar year 2013 informing them how to access their 1098-T form electronically.

Question: What should I do with this form?
Answer: You should retain the 1098-T form for your records and use it for determining your eligibility for the Lifetime Learning Education Tax Credit. You will not need to send this form to the IRS. Midwestern University is required to send your 1098-T form to the IRS by Section 6050S of the Internal Revenue Code, as enacted by the Taxpayer Relief Act of 1997.
Question: When I log in to my MWU account and click on the “1098-T” tab I do not see the 1098-T form, why?
Answer: If you can not access your 1098-T form you must not have been charged any tuition and/or student services fees from January 1, 2013 to December 31, 2013. In addition, non-resident alien students (visa students who do not possess a valid Social Security Number) will not receive a 1098-T form. If you still have questions regarding this matter please contact the Accounts Receivable department by phone or email.

DG Campus
(630) 515-6101
ilfinaid@midwestern.edu

AZ Campus
(623) 572-3267
azar@midwestern.edu.

Question: I am an international student. Am I eligible for an education tax credit?
Answer: IRS Notice 97-60 states that, in general, nonresident aliens are not eligible for such credits unless their marital status allows them to claim an exception. Nonresident aliens are instructed to discuss this point with a U.S. tax advisor.

International students who do not have valid Social Security Number (SSN) on file with the University will not receive a 1098-T or supplemental financial information. IRS Notice 98-59 states that "educational institutions are not required to file information returns for 1998 or 1999 with respect to nonresident alien students, unless requested to do so by the student." This waiver was extended to tax year 2000 in IRS Notice 99-37 and to tax year 2001 in IRS Notice 2000-62.

Question: Who do I contact if my name is incorrect?
Answer: Please log into your MWUnet account and make corrections. The Registrar’s Office will also need documentation verifying the name change (i.e. copy of marriage license, birth certificate, social security card, etc.). If you have questions or need assistance, you can email the Registrar’s Office.

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ilregistrar@midwestern.edu

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azregistrar@midwestern.edu.

Question: Who should I contact if my Social Security Number is incorrect?
Answer: Please submit a written letter of explanation and a copy of your Social Security card to:

Midwestern University
Office of Student Financial Services
555 31st Street
Downers Grove, IL 60515

Midwestern University
Office of Student Financial Services
19555 N. 59th Avenue
Glendale, AZ 85308.

You may be required to complete Form W-9S (Request for Student’s or Borrower’s Taxpayer Identification Number and Certification). Form W-9S is the official IRS form used to indicate your correct SSN. You need only to complete Part I of this form when requesting a 1098-T Form.
Question: My address listed on the 1098-T form is incorrect; how can I change my address?
Answer: The address shown on your 1098-T can be updated by logging into your MWUnet account and clicking on the “My Info” tab and then clicking on the “Name & Address” tab on the left hand side of the menu. However, please keep in mind that the address shown on the 1098-T is irrelevant for IRS income tax filing purposes.

Question: Why are boxes 1, 3, and 10 of the 1098-T form NOT populated with any information?
Answer: The IRS instructs institutions to report either payments received (Box 1) or amounts billed for qualified tuition and related expenses (Box 2) on the 1098-T Form. Once an institution has selected these options, they cannot change reporting methods between calendar years without permission from the IRS (Box 3). Midwestern University reports qualified tuition and related expenses that were billed during the tax year (Box 2); therefore, Box 1 will be blank. Box 10 is also blank because Midwestern University is not an insurer.

Question: How does the IRS define “qualified tuition and related expenses” in Box 2?
Answer: It is defined as any tuition and student services fee payment you have made in the 2013 calendar year (January 1, 2013 to December 31, 2013). It does NOT include books/supplies, on/off campus room/board, health/disability insurance fee, transportation or personal living expenses. As a result, the amount of your “qualified tuition and related expenses” listed in Box 2 of your 1098-T form may be LESS than the total amount of money you have paid directly to MWU. Please remember that the “calendar year” charges will most likely not match your “academic year” charges.

Question: Why is Box 8 (at least half-time student) on the 1098-T form not checked?
Answer: Box 8 will be checked only if you had registered for at least 6 credit hours per quarter in any program at Midwestern University.

Question: I disagree with my status in Box 8 (half-time or greater) or Box 9 (graduate student). Whom should I contact to correct this condition?
Answer: Please contact the Registrar’s Office by phone or email.

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(630) 515-6074  
ilregistrar@midwestern.edu

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(623) 572-3325  
azregistrar@midwestern.edu

Question: Can I claim payments made towards qualified tuition and expenses in 2013 for classes starting in early 2014?
Answer: Yes. The prepayment regulation explains if tuition is paid during one tax year for an academic period that begins during the first three months of the following tax year, taxpayers may claim the credit
for the year in which the payment is made. Please refer to your detailed, MWU Statement of Account which contains all applicable qualified tuition and student service fee payments/refunds you may possibly claim for a tax education credit.

Question: I would like an itemized listing of all my financial activity, but I see only a few items on my 1098-T form. Who do I contact to get a complete itemized listing of my financial activity?

Answer: Midwestern University does provide an itemized listing of financial activity. Students can view their MWU Statement of Account (bill) each quarter of every academic year through MWUnet. Once you gain access, click on the “Financial Services” tab and then click on “Statement of Account on the left hand menu. If additional information is needed regarding the itemized listing, please contact the Accounts Receivable department by phone or email.

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Question: I believe that the financial information provided on my 1098-T form is incorrect. Who do I contact to correct this situation?

Answer: Please contact the Accounts Receivable department by phone or email.

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