



Frequently Asked Questions Regarding the 1098-T Form Tax Year 2020

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 [irs.gov](https://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 website at [irs.gov](https://www.irs.gov).

Question: How can I obtain a copy of my 1098-T form for Tax Year 2020?

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. 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: All students billed during the 2020 calendar year will need to access their records via their [MWUNET](#) account. Midwestern University will email all students who have graduated, withdrawn or ceased to be enrolled in calendar year 2020 informing them how to access their 1098-T form electronically.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 cannot access your 1098-T form, you must **not** have been charged any tuition and/or student services fees from January 1, 2020 to December 31, 2020. 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 Student Accounts Office by e-mail.

IL Campus

ILStudentAccounts@midwestern.edu

AZ Campus

AZStudentAccounts@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.

IL Campus

ilregistrar@midwestern.edu

AZ Campus

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:

IL Campus

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

AZ Campus

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 from the menu. However, please keep in mind that the address shown on the 1098-T is irrelevant for IRS income tax filing purposes.

Question: Did 1098-T reporting change?

Answer: Starting calendar year 2018, institutions were instructed by the IRS to change reporting in Box 2 to reporting in Box 1, based on the aggregate amount of **payments made** for qualified tuition and related expenses during the year.

Question: What is categorized under qualified tuition and related expenses (QTRE)?

Answer: Qualified tuition and related expenses are tuition, fees, and course materials required for the student to be enrolled and attend your institution.

This does not include:

- Amounts for any course or other education involving sports, games or hobbies unless the course or other education is a part of the student's degree program or taken to acquire or improve job skills.
- Charges and fees for books, room, board, insurance, medical expenses (including student health fees), transportation, and similar personal, living or family expenses.

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 email.

IL Campus

ilregistrar@midwestern.edu

AZ Campus

azregistrar@midwestern.edu

Question: Can I claim payments made towards qualified tuition and expenses in 2020 for classes starting in early 2021?

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" from the menu. Please enter the BEGIN and END dates to cover the time period you need to review. If additional information is needed regarding the itemized listing, please contact the Student Accounts Office by email:

IL Campus

ILStudentAccounts@midwestern.edu

AZ Campus

AZStudentAccounts@midwestern.edu

Question: I misplaced my 1098-T form. How do I get another?

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. You may also print the form and retain it for your records.

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 Student Accounts Office by email at:

IL Campus

ILStudentAccounts@midwestern.edu

AZ Campus

AZStudentAccounts@midwestern.edu