

## 1098T FAQ for Students

Colleges and universities are required under Internal Revenue Code Section 6050S to issue the [Form 1098-T](#) (link is external) for the purpose of determining a taxpayer's eligibility for various tax credits and/or deductions. The form is informational only.

Cuyahoga Community College reports payments received for qualified tuition and related expenses (QTRE) on IRS Form 1098-T

While the FAQs below may provide some guidance, please note that **Cuyahoga Community College cannot provide tax filing advice regarding Form 1098-T or your eligibility for tax credits/deductions.** Please visit [irs.gov](https://irs.gov) or contact your tax professional for filing assistance.

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### **Form 1098-T questions**

#### 1. What is a Form 1098-T?

Colleges and universities are required under Internal Revenue Code Section 6050S to issue the Form 1098-T for the purpose of determining a tax payer's eligibility for various tax credits and/or deductions. The form is informational only.

#### 2. Does every student get a Form 1098-T?

Cuyahoga Community College must file a Form 1098-T for each student enrolled for the given calendar year and for whom a reportable transaction is made. However, the IRS does not require Cuyahoga Community College to provide a Form 1098-T for:

- Courses for which no academic credit is offered, even if the student is otherwise enrolled in a degree program
- Nonresident alien students
- Students whose qualified tuition and related expenses are entirely waived or paid entirely with scholarships/grants/3<sup>rd</sup> party sponsors AND there are no prior year adjustments.
- Students whose expenses are covered by a formal 3<sup>rd</sup> party billing arrangement
- Students who did not provide a valid mailing address to the College.

#### 3. When will I get my 1098T?

If you are eligible to receive to a 1098T, it will be available to you by Jan. 31<sup>st</sup>. Sign up for eDelivery to receive it sooner. You can sign up for eDelivery at My TriC Space/Paying for College/Tax Documents/Electronic 1098T Sign Up or click here <https://heartland.ecsi.net/index.main.html#/access/eConsent>. For 2023 the deadline to sign up is January 20th.

If you didn't elect the electronic delivery, your 1098T will be mailed to you starting January 31.

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### 4. I was told that I am "not eligible to receive a 1098-T form". Why?

Depending on your particular situation, Cuyahoga community College may not be required to produce a Form 1098-T for you. See exceptions in Question #2 "Does every student get a Form 1098-T?"

### 5. How can I use 1098T on my tax return?

1098T provides you and your tax preparer with information on amounts which may reduce your tax liability. Consult your accountant, tax preparer, or [Internal Revenue Service](#) on which amounts you can include for tax purposes. Please do not contact the College for any tax advice.

### 6. How do I get my 1098T??

If you didn't sign up for e-delivery you will receive your 1098T in the mail after 1/31. You can also go to the ECSI web site to retrieve/print your 1098T. This option is available to all students qualified to receive a 1098.

- Click on the link below or access it from MTC Space/Tax Documents (\*\*follow steps on page 8 to add this card if it's not already there)/Official 1098T: Login to Retrieve the Official 1098T. Make sure your web browser's pop up blocker is off. [ECSI - Sign In or Register](#)

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- If you have not already created a profile you will need to do so now. The only way to access your 1098T is to create a profile.
- After you have created your profile, you will need to sign in.
- Click this link to sign in: [ECSI - Sign In or Register](#)
- **Create A Profile**

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- To create a profile, click on the Sign In | Register link in the top right of the web page. Go to the Register and Create A New Profile area on the right side of the page. Follow the instructions below.
- **Step 1:** Think of the username you want to use and enter it in the Username field. Then think of a password you want to use and enter it in the Password field. You will need to re-enter the Password in the Confirm Password field. Click on the Continue button.
- **Step 2:** Enter your contact information including your first and last name, date of birth, phone number, and email address. Click on the Continue button.
- **Step 3:** Enter your address including street, city, state and zip code. Click on the Continue button.
- **Step 4:** Select three (3) security questions and enter your security answers. Check the reCAPTCHA checkbox and click on the Save Your Profile button.
- When your profile is successfully created, you will be returned to the Sign In page.
- **Sign In To Your Profile**
  - To sign in to your profile, click on the Sign In | Register link in the top right of the web page. Go to the Sign In To An Existing Profile area on the left side of the page. Follow the instructions below.
  - **Step 1:** Enter your username and password. Click on the Continue button.
  - **Step 2:** Choose how you want to receive your verification code. Check the reCAPTCHA checkbox and click on the Send Verification Code button.
  - *NOTE: You can receive the code via text if you entered a mobile number for your profile. Otherwise, you can receive your verification code via automated call or email.*
  - **Step 3:** Enter the verification code that you received in the Verification Code field. Click on the Continue button.
  - When you have successfully completed the Sign In process, you will be directed to the Your School Accounts page. This is where you will need to connect your tax form account to your profile to view or print your 1098-T(s)
- **Connect An Account**
  - To connect an account to your profile, use the following steps.
  - *IMPORTANT! You will need your Heartland Key to connect your account.*
  - **Step 1:** Click on the Connect An Account tile from the Your School Accounts page.
  - **Step 2:** On the right side of the page, enter your Heartland Key and click the Continue button.
  - If ECSI's information matches the information in your profile, your tax form account will be connected to your profile. If ECSI's information only partially matches your information in your profile, you will be prompted to enter additional points of verification. If ECSI's information does not match the information in your profile, you will be directed to call our Contact Center at (866) 428-1098.
  - If you signed up to receive your tax form electronically (completed the electronic consent application) prior to receiving your tax form, your Heartland Key will be located in the email communication you received from ECSI on behalf of your school. If you cannot locate this email, you will need to call our Contact Center at (866) 428-1098 to get your Heartland Key over the phone or have the email resent to you.
  - If you received a printed tax form that was mailed to your address, you will need to call our Contact Center at (866) 428-1098. Once you have verified your identity, we can either provide your Heartland Key over the phone or we can send an email with your Heartland Key to you.
  - **View Your 1098-T Tax Information Online**
  - After you have created a profile, signed in to your profile, and connected your tax form account, you can view your 1098-T tax information.

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- From the Your School Accounts page, click on the tile/card that is displayed for the school. Then, click on the View Account button. Your tax form information will be displayed on the page.
- **View Or Print Your 1098-T Tax Form**
- After you have created a profile, signed in to your profile, and connected your tax form account, you can view your 1098-T tax form.
- From the Your School Accounts page, click on the tile/card that is displayed for the school. Then, click on the View Account button. Your tax form information will be displayed on the page.
- *IMPORTANT: You must turn off pop-up blockers to view your form in the IRS Form 1098-T format. To turn off your pop-up blockers, visit the Tools or Settings menu for your specific browser.*
- Click on the View/Print Statement link to the right of the tax form information section. Your form will be presented in the IRS Form 1098-T format in your browser's standard print dialogue box. Follow the print instructions for your particular browser to print the form to your local printer.

Home Download Forms Help Center Contact Us

## Tax Document Information

This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker for this site. To turn off your Pop-up blocker, visit the Tools or Settings menu for your specific browser.

YOUR TAX STATEMENT

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STATEMENT DETAIL FOR CURRENT REPORTING PERIOD

1098-T STATEMENT Status: Delivered View Details »

**ECSI**  
Terms of Use - Privacy Statement - Site Map Live Chat

- Click View/Print Statement. Be sure your web browser's pop-up blocker is turned off to allow pop-ups from the Heartland ECSI website.

## Tax Document Information

This site uses Pop-up windows for printing your tax documents. Please be sure to turn off your Pop-up blocker for this site. To turn off your Pop-up blocker, visit the T or Settings menu for your specific browser.

### YOUR TAX STATEMENT

STATEMENT DETAIL FOR CURRENT REPORTING PERIOD

1098-T STATEMENT

Status: Delivered 0 -

Reporting Institution: Cuyahoga Community College

Tax Year: 2016

[View/Print Statement](#)  
You must turn off your pop-up blocker to view or print the tax form.



### 7. I misplaced the 1098T mailed to me. Can I get another copy?

See #6 for retrieving/printing your 1098T.

### 8. Why is the Amount Paid in BOX 1 different than what I actually paid?

Box 1 shows the total payment made in the tax year from any source (i.e. cash, check, credit card, financial aid, loans, 529, grants, scholarships, 3<sup>rd</sup> party sponsor pays, etc.) for qualified tuition and related expenses (QTRE) for the year less any reimbursements or refunds. Please note that this amount can be affected by prior year reporting. Here are some examples to illustrate various scenarios where Box 1 differs from what you paid.

- For example if you paid \$1,000 but your qualified tuition and related expenses was only \$800, Box 1 will show \$800.
- Here is another example, if you paid \$1,500 but \$300 of that was refunded to you because you dropped a class. Box 1 will show \$1,200.
- Let's say you paid \$1,500 during the year and \$500 of that was for a term prior to the tax year. Box 1 will only show \$1,000.

Any payments received by mail during the winter break (12/23/2023 – 1/2/2024) will be posted to your account when the College reopens and will be reported as payments for the subsequent tax year.

If you want a list of what you actually paid, log in to MTC Space, Tax Documents (\*\*follow steps on page 8 to add this card if it's not already there), 1098T Information. Select the Tax Year and click on Payments Received for any Terms to see a list of payments you made during the year.

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Form 1098-T, 2020

Service Provider/Acct. No. (opt)	8 Check if at least half time student <input checked="" type="checkbox"/>	9 Check if a graduate student <input type="checkbox"/>
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**Supplemental Information**

Hard Copy Mailed:	No
<b>Tax Report Description</b>	<b>Total</b>
Qualified Charges for any date	\$1,076.50
Payments Received for any Term	\$953.50

### 9. What are qualified tuition and related education expenses (QTRE)?

Only payments for qualified tuition and related expenses (QTRE) are reported in BOX 1. QTRE are tuition and certain related expenses required for enrollment or attendance at the College. That means fees such as meal plan, library fine, installment plan fees, and other miscellaneous fees are generally not QTRE. Please go to IRS Publication 970 Tax Benefits for Education for additional guidance (link to IRS Publication & Forms database provided below).

### 10. Did Cuyahoga Community College send a copy of this form to the IRS?

Yes. Go to the IRS web site to see the filing requirements [Publication 1220 \(Rev. 9-2020\) \(irs.gov\)](https://www.irs.gov/publications/p1220)

### 11. What am I supposed to do with the 1098-T Form?

Keep it for your personal records and share it with your tax preparer. The information contained in the 1098-T will help you determine if you may claim various tax credits and/or deductions for qualified educational expenses. Please be aware that the 1098-T captures financial information on a calendar year basis (January 1 – December 31) and you will likely need your **Account History** (also available in My Tri-C Space under Paying for College/View Account Details) and other personal receipts (e.g. books & supplies) to calculate your tax credits and deductions.

### 12. Which expenses qualify for the American Opportunity, or Lifetime Learning Credits?

Cuyahoga Community College University cannot legally provide tax advice. Please consult with a qualified tax preparer or the IRS if you have questions concerning how to use this form to prepare your tax return. For more information see the Additional Resources below.

### 13. Who can claim an Education Credit?

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Cuyahoga Community College University cannot legally provide tax advice. Please consult with a qualified tax preparer or the IRS if you have questions concerning how to use this form to prepare your tax return. For more information see the Additional Resources below.

### 14. What amounts are reported on Form 1098-T?

Box 1 -- Shows the total payments made during the year for qualified tuition and related expenses less any reimbursements or refunds made during the same year. Please note that this amount can be affected by prior year reporting.

Box 4 – Adjustments to prior year payments

Box 5 -- Represents the total amount of scholarships or grants received and processed for the calendar year.

Box 6 -- Represents the amount of reductions made for scholarships or grants reported for a prior year.

Box 8 -- Checked if you have been at least a half-time student (6 credit hours) for at least one academic period that began during the year.

### **Additional Resources**

- [IRS Publication 970, Tax Benefits for Education](#)
- [Form 8863 Instructions for Education Credits](#)
- [IRS Information on American Opportunity Credit](#)
- [IRS Information at Lifetime Learning Credit](#)
- [ECSI Student Tax Information](#)

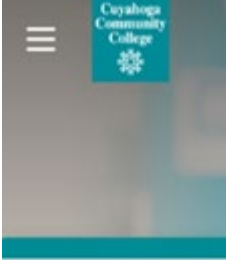
If you have additional questions, please contact us at [bursar@tri-c.edu](mailto:bursar@tri-c.edu)

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### \*\*How to Add a Card in MTC Space

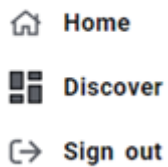
Please follow these steps to view your account information:

1. Log in to My Tri-C Space (here is the link: [my.Tri-c.edu](https://my.tri-c.edu))
2. Click the 3 lines in the top left corner.

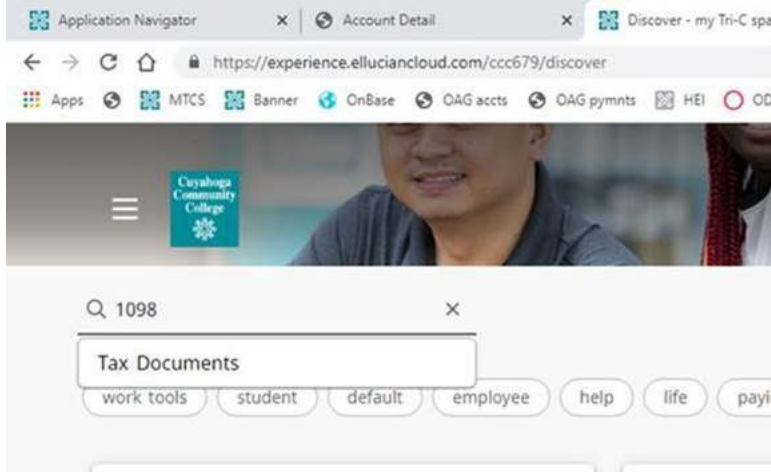


Have questions

3. Click “Discover”



4. In search area, type “1098” and then click “Tax Documents”.





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5. To add this to your card list, click the bookmark at the top right corner. This will add the card to your homepage. From here, you are able to sign up for electronic delivery, view your 1098-T, and review the FAQs.

