



IRS Form 1098-T Questions & Answers January 2018

Q: What is the IRS Form 1098-T?

A: The Form 1098-T is a statement that institutions of higher education are required to issue to certain students. It provides the total dollar amount charged to your student account for what is referred to as “qualified tuition and related expenses” (QTRE) in a single tax year.

Q: How do I access my Form 1098-T?

A: Please use the following instructions as Forms 1098-T are no longer mailed:

- Login to my.lakeland.edu.
 - If you forgot your password, please select the “Office 365 Password Self-Reset Instructions,” located on the left side of the screen.
- Click “Traditional Undergrad”, or “Evening, Weekend, Online”
 - You will only see the option for the program you are in
- Click “Student Accounts” on the left side of the screen. See below.
- Under “Print Invoice/Book Agreement/Account History/1098T” on the right side of the screen, click “Tax Form 1098T 2017.”
- Select the 1098T PDF.
- All current and former students will be able to access Form 1098-T in this manner.

Parents and Families Muskie Central IT HelpDesk Academics **Evening, Weekend & Online** Campus Life Alumni My Pages

You are here: [Evening, Weekend & Online](#) > [Student Accounts](#)

STUDENT ACCOUNTS

Announcements

If you have any questions regarding your account please contact the Bursar's Office (Formerly known as the Student Accounts Office) at [920-565-1000](tel:920-565-1000) x 2378 or the Business Office at [920-565-1027](tel:920-565-1027) x 2223.

The Course and Fee Statement below will only reflect current posted transactions. Anticipated transactions such as upcoming tuition and financial aid will only be reflected in the invoice.

CASHNet My Account Info

[My Account Balances](#)
[Course and Fee Statement](#)

Pay Using CASHNet

[Go to CASHNet](#)

Credit Cards Accepted: MASTERCARD, DISCOVER, and VISA.
There is No Service Fee for E-Check Payments or ACH transfers.

Select a Payment Option

Please use the following link to select a payment plan. If you have any questions, contact the Student Accounts Office at [920-565-1000](tel:920-565-1000) x2378.

[Click to select your payment option](#)

Lakeland University Book Agreement Information

To be eligible for a book charge you must have authorized financial aid that exceeds your student account charges. You will need to print the Lakeland University Book Agreement (below) and provide a signed copy to the bookstore to allow you to charge your books to your expected financial aid. If you cannot access the agreement you may view the status of your financial aid on Net Partner. The Spring Book Agreement will be available 12/18/17. Students that receive funding from sources other than federal aid need to contact Bursar's Office (formerly known as Student Accounts) for assistance.

Scan and email to : 0305mgr@follett.com as a [PDF attachment](#). No JPG nor HTML images can be accepted.

Print Invoice/Book Agreement/Account History/1098T

[Spring Invoice](#)
[Fall Invoice](#)
[Lakeland University Book Agreement](#)
[Transaction History 2016](#)
[Tax Form 1098T 2016](#)
[Transaction History 2015](#)
[Tax Form 1098T 2015](#)
[Transaction History 2014](#)
[Tax Form 1098T 2014](#)

Q: *What information is provided on Form 1098-T?*

A: Lakeland University is required by the IRS to furnish information in EITHER Box 1, Payments Received for Qualified Tuition and Related Expenses, OR Box 2, Amounts Billed for Qualified Tuition and Related Expenses, but not both. Lakeland has elected this year, as in previous years, to report Box 2.

Additionally, Lakeland provides information on Scholarships and Grants, if applicable to the student, in Box 5 and/or Box 6.

Please note that for the calendar year 2018 (next year), Lakeland will be required to report Box 1, Payments Received for Qualified Tuition and Related Expenses.

Q: *What are considered Qualified Tuition and Related Expenses (QTRE)?*

A: QTRE includes tuition; fees, including lab fees; and course materials billed to a student that are required for enrollment in a course. Amounts billed for room, board, insurance, interest, fines, and other charges are excluded.

Q: *What are considered Scholarships and Grants?*

A: Scholarships and grants are payments received from third parties, including payments received from governmental and private entities. Below are examples of qualified Scholarships and Grants:

- Corporation or employer payments under a third-party billing arrangement
- Department of Defense Tuition Assistance payments and/or support for service members and dependents
- Federal Pell, SEOG, or state grants, including vocational rehabilitation grants
- Institutional scholarships or grants
- Scholarships from a third party, including a private nonprofit or other organization, if processed by Lakeland as a scholarship or grant
- Scholarships restricted to room and board
- Veteran's benefits (Chapter 31, Chapter 33, and Yellow Ribbon)

Below are examples of items that do not meet the criteria of a qualified Scholarship and Grant:

- AmeriCorps payments
- Corporation or employer payment on account that are not administered or processed by the institution
- Tuition remission (waiver)
- Tuition exchange (waiver)
- Private payments on account, such as a family trust or §529 plan
- Veteran's benefits (Chapter 30)

Waivers of tuition will be reported as a reduction in the QTRE in Box 2.

Q: *The information on my Form 1098-T Box 2 seems too low. What do I do?*

A: It is possible that a tuition waiver, such as tuition remission, has been netted in Box 2, which will decrease the amount billed for QTRE.

Q: *I did not receive a Form 1098-T. Should I expect one?*

A: Lakeland is not required to produce Form 1098-T for students enrolled in courses for which no academic credit is offered, even if the student is otherwise enrolled in a degree program.

Q: *My SSN is incorrect on my form. What do I do?*

A: Lakeland solicits updated personal information each term upon registration. If you have not completed form W-9S via my.lakeland, you will need to follow instructions under the "Student Accounts" page and follow the prompts. If you have entered incorrect information, you will need to complete a paper form W-9S and submit it as noted below.

Please note that Lakeland is required to submit your personal information to the Internal Revenue Service. By law, you are required to provide your correct Taxpayer Identification Number (Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN)) to the persons who are required to file information returns with the IRS. If you fail to furnish your correct SSN or ITIN to Lakeland University, you are subject to a penalty of \$50, imposed by the IRS, unless your failure is due to reasonable cause and not to willful neglect.

If you are not 18 years of age, a parent or guardian must sign a paper form on your behalf. Completed paper forms can be returned via the following:

Fax: 920-565-1060;
Email: studentaccounts@lakeland.edu; or
US Mail: Lakeland University
Attn: Bursar
W3718 South Drive
Plymouth, WI 53073

You may print the IRS Form W-9S here: <https://www.irs.gov/pub/irs-pdf/fw9s.pdf>.

Q: *My tax preparer is asking for Box 1 to be completed. What do I do?*

A: Lakeland is only required by the IRS to furnish information in Box 1 or Box 2. It has elected, as in previous years to report Box 2. Lakeland cannot change reporting on a student-by-student basis. Therefore, Lakeland is unable to produce a Form 1098-T with this information. If you have questions regarding payments made, please refer to your billing statements.

Q: *What do I do with this form?*

A: Lakeland University cannot provide tax advice. Please contact your accountant or tax preparer for assistance.

Lakeland University's Volunteer Income Tax Assistance (VITA) program does offer to eligible individuals free tax preparation services. Please contact Brett Killion at 920-565-1000 ext. 2290 with questions.

Q: *How do I get a copy of my form?*

A: All current and former students should be able to access the form online. Upon request, Lakeland will also mail or fax a copy of Form 1098-T to you. For security purposes, Lakeland is unable to email the form.

Q: *Who do I contact if I have questions on the content of my form?*

A: Please contact the Business Office at 920-565-1000 ext. 2223 or businessoffice@lakeland.edu.