



IRS Form 1098-T Q&A

Q: *What is the IRS Form 1098-T?*

A: Form 1098-T is issued by higher education institutions to report the total amount paid for qualified tuition and related expenses (QTRE) in a single tax year. Lakeland reports the amount of QTRE you **paid** during the year in Box 1.

The amounts listed on your Form 1098-T can help you complete IRS Form 8863, used to calculate education tax credits for your tax return. You *may* be eligible for a federal education tax credit depending on your income (or your family's income, if you're a dependent), enrollment status, and qualified educational expenses. For more details, refer to [IRS Publication 970](#), page 9.

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

A: All current and former students should access Form 1098-T electronically on My.Lakeland using the following steps:

- Login to my.lakeland.edu.
 - *Forgot your password?* Click "Office 365 Password Self-Reset Instructions" on the left.
- Click "Student Accounts" under Quick Links on the left.
- Locate "Account History/1098T" on the right bottom of the screen
- Click the correct "Tax Form 1098T 20XX" for the last calendar year.
- Choose the 1098T PDF.

**** *The Form 1098T is not mailed and cannot be emailed for security purposes; However, Lakeland can mail or fax a copy of Form 1098-T upon request.* ****

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

A: Lakeland University is required by the IRS to report information in Box 1, which is the Payments Received for Qualified Tuition and Related Expenses. If applicable, information on Scholarships and Grants is also provided in Box 5 and/or Box 6.

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

A: QTRE includes tuition, fees (including lab fees), and required course materials paid for enrollment in an academic period in a tax year or the first three months of the next tax year. It does not include payments for room, board, insurance, interest, fines, or other charges.

Q: *What are considered Scholarships and Grants?*

A: Scholarships and grants are payments received from third parties, including government and private entities. Examples include:

- Corporation or employer payments through third-party billing
- Department of Defense Tuition Assistance payments and support for service members and dependents

- Federal Pell, SEOG, or state grants, including vocational rehabilitation grants
- Institutional scholarships or grants
- Third-party scholarships, including those from private nonprofits, processed by Lakeland as a scholarship or grant
- Scholarships restricted to room and board
- Veteran's benefits (Chapter 31, Chapter 33, and Yellow Ribbon)

Items that do not qualify as a Scholarship or Grant include:

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

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 that do not offer academic credit, even if the student is enrolled in a degree program. Additionally, you must have made payments for qualified tuition and related expenses (QTRE) or received a scholarship or grant in a tax year.

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

A: If you have entered incorrect information or have not completed a W-9, you will need to complete a paper W-9S form 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; 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: *What do I do with this form?*

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

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

A: Please contact the Bursar at 920-565-1000 ext. 2378 or studentaccounts@lakeland.edu.