1098-T Form Breakdown

The 1098-T Tuition Statements are issued each year by January 31st. 1098-T forms are mailed to all students who have been billed for qualified tuition and fees in the previous calendar year, using the mailing address on record in Banner (please make sure your information is always current).

Please note that, while it is our goal to provide the highest level of customer service, the Bursar's office cannot provide anyone with any tax advice. For more information on tax benefits for education and qualified expenses see: <u>IRS Publication 970</u>. For more information on the 1098-T form see: <u>Form 1098-T Tuition Statement (IRS)</u>.

1098 T	Breakdown		
FILER'S name, street address, city or town, state or province, country, ZIP of foreign postal code, and telephone number	r 1 Payments received for qualified tuition and related expenses	OMB No. 1545-1574	This is important tax information and is being furnished to the IRS. This form must be used a complete Form 886 to claim education credits. Give it to the
FILER'S employer identification no. STUDENT'S TIN	its reporting method for 201		
STUDENT'S name	Adjustments made for a prior year	5 Scholarships or grants	
Street address (including apt. no.) City or town, state or province, country, and ZIP or foreign postal code	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January—March 2019	
Service Provider/Acct. No. (see instr.) 8 Check if at least half-time student Form 1098-T (keep for your records)	9 Checked if a graduate student	10 Ins. contract reimb./refund \$	tax preparer or use it prepare the tax retu

FILER'S information: This box contains the Bursar's Office address and the telephone number to ASU's third party vendor who provides the forms electronically.

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FILER'S name, street address, city or town, state or province, country, ZIP of foreign postal code, and telephone number	r 1 Payments received for qualified tuition and related expenses \$ 2	OMB No. 1545-1574	Tuition Statemen
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FILER'S employer identification no. STUDENT'S TIN	its reporting method for 201	educational institution changed	Copy B
		<u> </u>	For Student
STUDENT'S name	4 Adjustments made for a prior year	5 Scholarships or grants	This is importan tax information
	\$	\$	and is being
Street address (including apt. no.) City or town, state or province, country, and ZIP or foreign postal code	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period	furnished to the IRS. This form must be used to complete Form 8863
only of lown, state of province, country, and 21 of foreign postar code	s	beginning January— March 2019	to claim education credits. Give it to the
Service Provider/Acct. No. (see instr.) 8 Check if at least half-time student	9 Checked if a graduate student	10 Ins. contract reimb./refunc	tax preparer or use it to prepare the tax return
Form 1098-T (keep for your records)	www.irs.gov/Form1098T	Department of the Treasury	/ - Internal Revenue Service

FILERS'S federal identification number: This box contains ASU federal identification number.

FILER'S name, street address, city or foreign postal code, and telephone no	town, state or province, country, ZIP or imber	Payments received for qualified tuition and related expenses \$ 2	OMB No. 1545-1574	Tuition Statement	
Ell EDIO	LOTUDENTIO TIN	la Killi I i i i i i i i i i i i i i i i i i	Form 1098-T		
FILER'S employer identification no.	STUDENT'S TIN	3 If this box is checked, your e its reporting method for 2018		Copy B For Student	
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants	This is important tax information and is being	
Street address (including apt. no.)		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an	furnished to the IRS. This form must be used to	
City or town, state or province, count	ry, and ZIP or foreign postal code	\$	academic period beginning January— March 2019	complete Form 8863 to claim education credits. Give it to the	
Service Provider/Acct. No. (see instr.	half-time student	9 Checked if a graduate student	10 Ins. contract reimb./refund	tax preparer or use it to prepare the tax return.	

Student's information: These boxes contain the student's full legal name and mailing address (the mailing address on record in Banner Web).

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FILER'S name, street address, city or town foreign postal code, and telephone number		Payments received for qualified tuition and related expenses 2	OMB No. 1545-1574	Tuition Statement
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FILER'S employer identification no. ST	UDENT'S TIN	3 If this box is checked, your e its reporting method for 201	educational institution changed 8	Copy B For Student
STUDENT'S name		Adjustments made for a prior year	5 Scholarships or grants	This is important tax information and is being
Street address (including apt. no.) City or town, state or province, country, a	nd ZIP or foreign postal code	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period	furnished to the IRS. This form must be used to complete Form 8863
ony or torn, out or province, country, a	Zii di ididigii podiai dada	s	beginning January— March 2019	to claim education credits. Give it to the
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student	9 Checked if a graduate student	10 Ins. contract reimb./refund	tax preparer or use it to prepare the tax return.
Form 1098-T (keep	for your records)	www.ire.gov/Form1008T	Department of the Treasury	- Internal Revenue Service

<u>Box 1</u>: Shows the total payments received by ASU in 2018 from any source for qualified tuition and related expenses less any reimbursements or refunds made during 2018 that relate to those payments received during 2018.

FILER'S name, street address, city or to foreign postal code, and telephone nut	lown, state or province, country, ZIP or mber	1 Payments received for qualified tuition and related expenses 2	OMB No. 1545-1574 2018 Form 1098-T	Tuition Statement
FILER'S employer identification no.	STUDENT'S TIN	3 If this box is checked, your e its reporting method for 2018	ducational institution changed	Copy B For Student This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the
STUDENT'S name		Adjustments made for a prior year S	5 Scholarships or grants	
Street address (including apt. no.) City or town, state or province, country	y, and ZIP or foreign postal code	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January—March 2019	
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student	9 Checked if a graduate student	10 Ins. contract reimb./refund	tax preparer or use it to prepare the tax return.

<u>Box 3</u>: Shows whether ASU changed its reporting method for 2018. It has changed its method of reporting if the method (payments received) used for 2018 is different than the reporting method (amounts billed) for 2017. You should be aware of this change in figuring your education credits.

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FILER'S name, street address, city or town, foreign postal code, and telephone number		Payments received for qualified tuition and related expenses 2	OMB No. 1545-1574		Tuition Statement	
			Form 1098-T			
FILER'S employer identification no. STU	JDENT'S TIN	3 If this box is checked, your e its reporting method for 201				
STUDENT'S name		Adjustments made for a prior year	5 Scholarships or grants		This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the	
Street address (including apt. no.)		b Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an			
City or town, state or province, country, an	d ZIP or foreign postal code	s	academic period beginning January — March 2019			
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student	9 Checked if a graduate student	10 Ins. contract reimb./re	fund	tax preparer or use it to prepare the tax return	
Form 1098-T (keep for	or your records)	www.irs.gov/Form1098T	Department of the Trea	asury -	Internal Revenue Service	

<u>Box 4</u>: Shows any adjustment made by ASU for a prior year for qualified tuition and related expenses that were reported on a prior year Form 1098-T. This amount may reduce any allowable education credit that you claimed for the prior year (may result in an increase in tax liability for the year of the refund).

FILER'S name, street address, city or town, state or province, country, Zli foreign postal code, and telephone number	RECTED P or 1 Payments received for qualified tuition and related expenses \$	OMB No. 1545-1574 2018 Form 1098-T	Tuition Statement	
FILER'S employer identification no. STUDENT'S TIN	3 If this box is checked, your educational institution changed its reporting method for 2018		Copy B For Student	
STUDENT'S name	Adjustments made for a prior year	5 Scholarships or grants	This is important tax information and is being	
Street address (including apt. no.) City or town, state or province, country, and ZIP or foreign postal code	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January — March 2019	furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the	
Service Provider/Acct. No. (see instr.) 8 Check if at least half-time student	9 Checked if a graduate student	10 Ins. contract reimb./refund	tax preparer or use it to prepare the tax return.	

<u>Box 5</u>: Indicates the total of all scholarships and/or grants administered and applied to the student's account by the ASU. The amount of scholarships or grants for the calendar year may reduce the amount of any education credit or deduction you may claim for the tax year.

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FILER'S name, street address, city or town, foreign postal code, and telephone number	state or province, country, ZIP or	Payments received for qualified tuition and related expenses	OMB No. 1545-1574	Tuition Statement
			Form 1098-T	
FILER'S employer identification no. STUE	DENT'S TIN	its reporting method for 201	educational institution changed 8	Copy B For Student
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants	This is important tax information and is being
Street address (including apt. no.) City or town, state or province, country, and	ZIP or foreign postal code	6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January— March 2019	furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student	9 Checked if a graduate student	10 ins. contract reimb./refund	tax preparer or use it to prepare the tax return.
Form 1098-T (keep for	r your records)	www.irs.gov/Form1098T	Department of the Treasury	y - Internal Revenue Service

<u>Box 7</u>: Shows whether the amount in box 1 includes amounts for an academic period beginning January–March 2019.

Tuition Statement	OMB No. 1545-1574	Payments received for qualified tuition and related expenses 2		FILER'S name, street address, city or tov foreign postal code, and telephone numb
Conv.B	Form 1098-T	3 If this box is checked, your e	TUDENT'S TIN	FILER'S employer identification no.
Copy B For Student		its reporting method for 2018	TODENT 3 TIN	FILEN 3 employer identification no.
This is important tax information and is being	5 Scholarships or grants	Adjustments made for a prior year		STUDENT'S name
furnished to the IRS. This form must be used to complete Form 8863	7 Checked if the amount in box 1 includes amounts for an	6 Adjustments to scholarships or grants for a prior year		Street address (including apt. no.)
to claim education credits. Give it to the	academic period beginning January— March 2019	s	and ZIP or foreign postal code	City or town, state or province, country,
tax preparer or use it to prepare the tax return	10 Ins. contract reimb./refund	9 Checked if a graduate student	8 Check if at least half-time student	Service Provider/Acct. No. (see instr.)

<u>Box 8</u>: Indicates whether a student was considered at least a half-time student. Undergraduates must be enrolled in a minimum of 6 hours to be considered at least half-time. Graduates must be enrolled in a minimum of 5 hours to be considered at least half-time.

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FILER'S name, street address, city or to foreign postal code, and telephone nut		Payments received for qualified tuition and related expenses S	OMB No. 1545-1574 2018 Form 1098-T		Tuition Statement	
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FILER'S employer identification no.	STUDENT'S TIN	3 If this box is checked, your e		nged	Сору В	
	×	its reporting method for 201			For Student	
STUDENT'S name		4 Adjustments made for a	5 Scholarships or grant	s	K	
		prior year			This is important	
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		\$	\$		furnished to the	
Street address (including apt. no.)		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amour in box 1 includes amounts for an	nt	IRS. This form must be used to	
City or town, state or province, countr	y, and ZIP or foreign postal code	. Israpioryan	academic period beginning January—		complete Form 8863 to claim education	
		IS	March 2019		credits. Give it to the	
Service Provider/Acct. No. (see instr.)	8 Check if at least	9 Checked if a graduate	10 Ins. contract reimb./	refund	tax preparer or use it to prepare the tax return.	
2752	half-time student	student	\$		propare the tax return	
Form 1098-T (ke	eep for your records)	www.irs.gov/Form1098T	Department of the Tr	easury -	Internal Revenue Service	

<u>Box 9</u>: Indicates whether ASU considers you to have been enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level course work during the specified tax year.

Tuition Statement	OMB No. 1545-1574	Payments received for qualified tuition and related expenses S	town, state or province, country, ZIP or umber	FILER'S name, street address, city or foreign postal code, and telephone nu
	Form 1098-T			
Copy B For Student		3 If this box is checked, your ed its reporting method for 2018	STUDENT'S TIN	FILER'S employer identification no.
This is important tax information and is being	5 Scholarships or grants	Adjustments made for a prior year		STUDENT'S name
furnished to the IRS. This form must be used to	7 Checked if the amount in box 1 includes amounts for an	6 Adjustments to scholarships or grants for a prior year		Street address (including apt. no.)
complete Form 8863 to claim education credits. Give it to the	academic period beginning January— March 2019	\$	ry, and ZIP or foreign postal code	City or town, state or province, count
tax preparer or use it to prepare the tax return.	10 Ins. contract reimb./refund	9 Checked if a graduate student	8 Check if at least half-time student	Service Provider/Acct. No. (see instr.)

ASU Third party Service provider account number.