



1098-T Student FAQ

Purpose: To provide students with answers to frequently asked questions regarding the 1098-T tax form. Any additional questions should be directed to Student Accounts at AZStudentAccounts@midwestern.edu or ILStudentAccounts@midwestern.edu

1. What is a 1098-T?

Colleges and universities are required by the Internal Revenue Service (IRS) to provide each eligible student with a

1098-T tax form. This document contains important information that is also provided to the IRS. The document is used to assist students and their families in computing any tax credit or deduction they may be able to claim. Please consult with a tax professional for detailed information on tax benefits for education and assistance in determining eligibility criteria.

2. How can I get a copy of my current or previous year 1098-T?

When the 1098-T form is available, you can access the form online thru the online.midwestern.edu site:

- a) Log onto your Student Portal
- b) Select "Financial Service" tab
- c) Select the 1098-T link at the menu bar.
- d) For multiple years, use the drop-down menu to select the year you want.

If you have any difficulties printing your 1098-T, please ensure that you have Adobe Acrobat installed on your computer. If you still have problems, please contact Student Accounts.

If the 1098-T is not available in your student portal, please contact Student Accounts.

IL Campus

ILStudentAccounts@midwestern.edu

AZ Campus

AZStudentAccounts@midwestern.edu

3. I am an international student. Am I eligible for an education tax credit?

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 a 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.

4. Who should I contact if my name or address is incorrect?

You can update this information by logging into your MWUnet Student Portal and select the “My Info” tab. The Registrar’s Office will also need documentation verifying a name change (i.e., copy of marriage license, birth certificate, SSN card, etc.). If you have questions or need assistance, you can contact the Registrar’s Office.

IL Campus

ILRegistrar@midwestern.edu

AZ Campus

AZRegistrar@midwestern.edu

5. Who should I contact if my Social Security Number is incorrect:

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

6. Do I have to select a preferred method of delivery of my 1098-T each year?

No, all current and alumni students will be able to access their 1098-T form(s) by logging into their MWUnet Student Portal.

7. When will the 1098-T link become available on the Student Portal?

If you are eligible for a 1098-T, an email notification will be sent to your MWU email account when the link becomes available. You should receive this email on or before January 31st.

8. What educational expenses are considered qualified tuition and related expenses (QTRE)?

Qualified tuition and related expenses are tuition, fees, and course materials required for the student to be enrolled and attend MWU. This does not include:

- Amounts for any course or other education involving sports, games, or hobbies unless the course of 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.

9. Why is Box 2 empty instead of Box 1?

The IRS directs institutions to report either Payments Received (Box 1) or Amounts Billed (Box 2) for qualified tuition and related expenses. Midwestern University reports information in Box 1 which includes payments/loans received for qualified tuition and related expenses. Box 2 is intentionally left blank.

10. In addition to Box 1, what other information does the Midwestern University report to the IRS?

Midwestern University reports in boxes 4, 5, 6 and 8.

- Box 4 shows any adjustments made for a prior year for qualified tuition and related expenses (e.g., a transaction that posted in the tax year that is a credit for a charge made in a previous year).
- Box 5 lists scholarships or grants including:

- Scholarships
- Outside sponsored awards
- Box 6 shows adjustments to scholarships or grants for a prior year (e.g., a refund that posted in the tax year that relates to a transaction from a previous tax year).
- Box 8 shows registration of 6+ credit hours.

11. What is Northwestern University's Tax ID#?

Northern University's Tax ID number is 36-3377698.

12. Who do I contact if I see a discrepancy on my 1098-T?

Please contact Student Accounts for additional assistance in reviewing your account and for any questions you may have regarding the 1098-T process.

IL Campus

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AZ Campus

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