Frequently Asked Questions
IRS Form 1098-T
University of North Texas

1. **What is the IRS Form 1098-T?**
   The Form 1098-T provides tax information for individuals who are eligible for the American Opportunity Credit or the Lifetime Learning Credit so that they may claim a tax credit on their IRS tax return.

   For more information on these tax credits including eligibility requirements, please visit https://www.irs.gov/pub/irs-pdf/p970.pdf for Pub. 970. This publication provides the information you need.

2. What are Qualified Tuition and Related Expenses (QTRE)?
   Qualified tuition and related expenses are tuition, fees, and course materials required for a student to be enrolled at or attend an eligible educational institution. Amounts paid for any course involving sports, games, or hobbies (unless part of your degree program or taken to acquire or improve job skills) are not eligible.

3. What tuition and fees are **not qualified** to be on the Form 1098-T?
   The IRS considers Housing/Meal charges, Transportation charges and Medical charges to be unqualified expenses. This would cover parking fees, health insurance and medical service fees as well as some miscellaneous fees. See Pub. 970 at https://www.irs.gov/pub/irs-pdf/p970.pdf. This will explain the details of claiming the tax credits (e.g. who is eligible, charges that are eligible or ineligible) and your responsibilities in the process.

4. When will the Form 1098-T be available?
   The Form 1098-T will be available no later than January 31st each year.

5. Where can I find my Form 1098-T?
   The Form 1098-T is available on your myUNT Student Center on the Account Services tab. If you did not sign up for an electronic form, your Form 1098-T will be mailed to you at the mailing address on file. Please verify/update your mailing address no later than January 10th if you are expecting a paper copy of your Form 1098-T.

6. May I get an email copy of my Form 1098-T?
   Due to the confidential nature of the information, we do not email the 1098-T forms. The forms are available online or through the mail. If needed, it can be requested in person at Student Financial Services on the first floor of the Eagle Student Services Center.

7. Can my parents/spouses/family members have access to my 1098-T information?
   For parents, spouses or family members to have access, the student will need to complete a Release of Information form. This is available online at https://sfs.unt.edu/forms .

8. Why doesn't Box 1 on the 1098-T match what I personally paid?
   - Payments for unqualified charges will not show up in Box 1.
   - Payments that occurred in 2018 for Spring 2019 sessions will be included on the 2018 1098-T. It is determined by when the payment was made.
   - Payments from other sources (e.g. scholarships) are included in Box 1 which is over and above the amount that you personally paid.

9. The amounts reported are calculated from your account terms covered by the calendar year being reported.

   Box 1 = Payments + Financial Aid – Refunds – Ineligible Items
   Box 4 = Adjustments made in the reporting year for the prior year(s)
   Box 5 = Financial Aid provided to you in the reporting year
   Box 6 = Adjustments made in the reporting year by Financial Aid for the prior year(s).

10. I graduated in Spring and did not receive a Form 1098-T.

    Your payment for Spring was most likely made in Fall of the prior year. Since payments are reported when they are made, any payments made in the prior year would have been included on the prior year's Form 1098-T.

Additional Questions?

Contact Student Financial Services

Email: sfs@unt.edu

Phone: 940.565.3225