

Understanding your Form 1098-T

SDSU

University
Bursar's Office

Overview of Form 1098-T

Form 1098-T is an informational document submitted to the Internal Revenue Service (IRS) that details the amount students have paid for **qualified tuition expenses**. This form can assist in deciding whether to claim educational tax credits through Form 8863 and Form 1040 / 1040A.

SDSU will generate Form 1098-T by January 31st each year. It's important to note that there is no IRS mandate requiring students to claim the tuition and fees deduction or an education credit. Claiming educational tax benefits is a voluntary choice for those who may be eligible.

What are “Qualified Tuition Expenses”:

Per the Internal Revenue Service website, “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”.

The following are not qualified tuition and related expenses.

- Amounts paid for any course or other education involving sports, games, or hobbies, unless the course or other education is part of the student's degree program or is taken to acquire or improve job skills.
- Charges and fees for room, board, insurance, medical expenses (including student health fees), transportation, and similar personal, living, or family expenses.

Downloading your Form 1098-T:

Students must log in to their my.SDSU to view and download their form, provided they have chosen to receive it electronically.

By default, SDSU will mail the Form 1098-T to the home address on file, if you have not already signed up to receive it electronically. If you do not need to have the form mailed, please opt-in for online delivery only.

Click [here](#) for step-by-step instructions on opting in for online delivery.

***Former student** please submit your Form 1098-T request [here](#).

IMPORTANT: Parent Accounts cannot access Form 1098-T, only a student may retrieve the form using their own student credentials. SDSU does not assist in tax preparation, act as a tax consultant for individuals or entities, provide tax advice, and cannot answer your tax questions. Please consult a tax professional, the IRS, or a financial planner who is proficient with tax and tax laws.



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Example of Form 1098-T

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses	OMB No. 1545-1574
		\$ 1	2024
FILER'S employer identification no. STUDENT'S TIN		3	Form 1098-T
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants
Street address (including apt. no.)		\$ 4	\$ 5
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 2025
Service Provider/Acct. No. (see instr.)		\$ 6	<input checked="" type="checkbox"/> 7
8 Checked if at least half-time student	9 Checked if a graduate student	10 Ins. contract reimb./refund	
<input checked="" type="checkbox"/> 8	<input checked="" type="checkbox"/> 9	\$ 10	

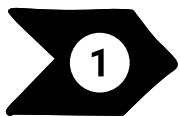
Form **1098-T** (keep for your records) www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service

Tuition Statement

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 tax preparer or use it to prepare the tax return.

Appropriate Box Explanation:



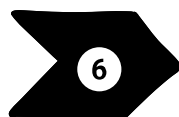
Reports total amount of out-of-pocket payments made towards tuition and mandatory campus fees less any related reimbursement or refunds.



Shows any adjustment made by an eligible educational institution 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).



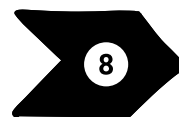
Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of the education credit you claim for the year.



Shows adjustments to scholarships or grants for a prior year. This amount may affect the amount of any allowable tuition and fees deduction or education credit that you claimed for the prior year. You may have to file an amended income tax return (Form 1040-X) for the prior year



If checked, this indicated that Box 1 includes amounts for an academic period beginning in the next calendar year.



Reports whether you are considered to be carrying at least one-half of the normal full-time course load for your course of study at SDSU.



Reports whether you are considered to be enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level educational credential.

