1098-T Tax Form FAQs

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Important Dates
1098-T tax forms will be available online through the myHUgo portal before the January 31 mailing deadline. Please allow 7-10 days for 1098-T tax forms to be mailed to students who do not choose electronic delivery.

Questions about your 1098-T tax form and how to access it online?
Students can use the How to Access Your Electronic 1098-T Tax Form guide to access their form from the myHUgo portal.

What is the 1098-T tax form?
The Internal Revenue Service (IRS) requires Hodges University to issue Form 1098-T to each qualified student by January 31 of each year. The 1098-T tax form is an informational tax document to aid taxpayers in determining if they are eligible to claim a tax deduction or one of the education tax credits. The 1098-T tax form is NOT to be filed with a tax return. Its purpose is not to report scholarship income to the IRS; it is for information purposes only.

Why did I not receive a 1098-T tax form?
There are several possibilities why a student may not receive a 1098-T tax form:

- Grants, scholarships and/or third-party sponsors, including VA Chapter 31, 33 benefits posted to the student account during the calendar year, were equal to the total Qualified Tuition and Related Fees charged to your account.
- There were no Qualified Tuition and Related Fees charged to the student account during the calendar year. For example, if you registered in December 2015 for a UPower™ subscription, those charges would be posted to your student account in the month of registration which would be included in the 2015 1098-T tax form and not 2016. If no other registration took place in 2016, there would be no 1098-T tax form generated for 2016.
- The student was not enrolled at Hodges University for any courses that were eligible for academic credit during the 2016 calendar year even if they are otherwise enrolled in a degree program.
- The student is a nonresident alien.
- The paper copy of the 1098-T tax form was mailed to the address on file and returned by the Postal Service. Students must make sure to keep their address current through the Registrar’s Office. It is the student’s responsibility to make sure address information is correct at least 30 days prior to the 1098-T tax forms being available to students.
Why is my Social Security Number (SSN) or Taxpayer Identification Number (TIN) required for the 1098-T tax form?

- Federal regulations require students to furnish their Social Security Number (SSN) or Taxpayer Identification Number (TIN) for federal reporting requirements. These requirements apply to any student, regardless of whether the student seeks or intends to seek any tax credits.
- It is the student’s responsibility to ensure that information is accurate at least 30 days prior to the 1098-T tax forms being available students.
- A student who does not provide their SSN or TIN upon request by the educational institution can be subject to a fine imposed by the Internal Revenue Service (IRS).

The SSN or TIN on my 1098-T tax form is missing or incorrect. What should I do?

Reporting to the IRS depends primarily on the student’s SSN or TIN. It is very important for the student to have the correct information on file with the University. If you receive a form with the wrong information, take action immediately.

If you receive your 1098-T tax form and your SSN or TIN information is incorrect, please contact the Registrar’s Office to have this information updated. Your Social Security Card or Taxpayer Identification Letter (from the IRS) will need to be presented to the Registrar’s Office in either of the following ways:

**In person:**
Registrar’s Office
Fort Myers campus: 4501 Colonial Boulevard Fort Myers, FL 33966 (1st floor)
Naples campus: 2647 Professional Circle Naples, FL 34119 (2nd floor)

**Email:** registrar@hodges.edu

**Fax:** (239) 938-7892

Hodges University strives to protect our students and their information. When make requests for information or assistance, please include your Student ID number and Date of Birth.

How do I use the 1098-T tax form when filing my taxes?

Hodges University employees cannot offer tax advice. Students who have questions concerning their 1098-T tax information should consult with a qualified tax professional or contact the IRS Taxpayer Assistance line at (800) 829-1040. The IRS website also has information about the 1098-T tax form:

- IRS Official Website
- Instructions for Form 1098-T by Year
Why is Box 1 (payments received) blank?
As stated in IRS guidelines, higher education institutions must choose to report either (Box 1) payments received for qualified tuition and related expenses or (Box 2) amounts billed for qualified tuition and related expenses. Hodges University has chosen to report (Box 2) amounts billed for qualified tuition and related expenses.

Why doesn’t Box 2 (amounts billed) match my receipts?
Student’s receipts will show when they paid, which would not match Box 2 because Box 2 shows when they were charged. In addition, not all charges are considered Qualified Tuition and Related Fees by the IRS. Box 2 only includes qualified expenses. Textbooks, supplies, equipment and other similar expenses are not qualified expenses to be reported on the 1098-T tax form.

Why doesn’t Box 5 (scholarships and grants) match my records?
Box 5 shows the amount of scholarships and grants the student received. Box 5 does not include loans. Scholarships and grants reduce the amount of qualified expenses the student can use when calculating a deduction or credit. If the amount of scholarships and grants the student received in a calendar year is equal to the amount of qualified expenses they are charged in that year, a 1098-T tax form will not be generated for that student.

Can my parent(s), other persons who may claim me as a dependent, or my tax preparer receive my 1098-T tax form directly?
As required by the Family Education Rights and Privacy Act (FERPA), Hodges University cannot provide this information directly to anyone other than the student. If the student is claimed as a dependent on another person’s tax returns (such as their parent’s), the student will need to provide the 1098-T tax form directly to that person.