

1098-T Tax Form Sample

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| FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Wittenberg University P.O. Box 720 Springfield, OH 45501-0720 937-327-6146 | | 1 Payments received for qualified tuition and related expenses 2 | OMB No. 1545-1574 2022 Form 1098-T | Tuition Statement |
| FILER'S employer identification no. 31-0537177 | STUDENT'S TIN | 3 | 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. | |
| STUDENT'S name | | 4 Adjustments made for a prior year \$ | | 5 Scholarships or grants \$ |
| 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 academic period beginning January-March 2023 <input type="checkbox"/> |
| City or town, state or province, country, and ZIP or foreign postal code | | | | |
| Service Provider/Acct. No. (see instr.) | 8 Checked if at least half-time student <input type="checkbox"/> | 9 Checked if a graduate student <input type="checkbox"/> | | 10 Ins. contract reimb./refund \$ |
| Form 1098-T | | (keep for your records) | | www.irs.gov/Form1098T |

Box 1 – The total payments from any source by an eligible educational institution for qualified tuition and related expenses (QTRE) less any reimbursements or refunds made that relate to payment received during the tax year. Please note the amount in Box 1 will NOT equal to or sum to the charges paid for the calendar year in question because all charges are not considered qualified tuition and related expenses as defined by the IRS. See the chart below for a list of qualified and unqualified expenses.

- **Charges Reported:** Tuition, Student Activity & Technology Fees, Required Course/Program Fees
- **Charges Not Reported:** Room, Board, late fees, health insurance, parking & miscellaneous fees

Box 4 – The amount of any adjustments made for a prior year for qualified tuition and related expenses that were reported on a prior year 1098-T Form. This amount may reduce any allowable education credit you may claim for the prior year. See Form 8863 or the IRS Pub 970 for more information.

Box 5 – The total amount of scholarships, grants, and fee waivers administered and processed by the university. This box also includes all payments received from third parties (excluding family members and loan proceeds) such as the Department of Veterans Affairs, the Department of Defense, civic and religious organizations and other nonprofit entities.

Box 6 – The amount of any adjustments made for prior year scholarships, grants, or other third parties originally reported on a prior year 1098-T Form.

Box 7 – Will be checked if the amount in Box 1 includes amounts for an academic period beginning in the proceeding January – March months. See the IRS Pub 970 for how to report these amounts.

Box 8 – Indicates whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at Wittenberg.

Box 9 – Indicates whether you are considered to be enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level education credential.

Box 10 – Will always be blank on any 1098-T forms you receive from Wittenberg.