1098T Tax Form FAQ

Q: What is the 1098T tax form?
A: The 1098T tax form is an Internal Revenue Service (IRS) tuition statement which is intended to help students file their federal income tax return. The University mails paper copies of the 1098T tax form to students each January (unless the student has opted to receive it electronically) and also reports this same information to the IRS. Students need to keep the 1098T tax form for their records. Since Kent State sends students’ 1098T tax information directly to the IRS, there is no need for students to include the 1098T tax form when filing their tax return. Students only need to use it if they are planning to file Form 8863 with their taxes. Students can opt to receive their 1098T tax form electronically, which allows the student to access their 1098T tax form information about two weeks earlier than if it was mailed to her/him. Students who do not opt to receive their 1098T electronically can expect to receive a paper copy of their 1098T tax form after January 31st each year.

Q: What are the benefits of receiving the 1098T tax form electronically?
A: There are several reasons such as:
- Allows the student to access their 1098T tax form information about two weeks earlier than if it were mailed to her/him. Students who do not opt to receive their 1098T tax form electronically can expect to receive a paper copy of their 1098T tax form after January 31st each year
- There is no chance of it getting lost, delayed, or misplaced since students can access a copy 24/7.
- Students will also be able to access prior years’ 1098-T tax forms for future needs in a quick and easy fashion.
- Students are able to access their electronic copy using their smart phones, tablets, or computer when they need it.
- Eco-friendly since no paper is needed.

Q: How do I opt in to receive my 1098T tax form electronically?
A: Log into Flashline and follow the steps listed below:
- Log in to Flashline and click on the “My Account” tab
- Select “1098T Tax Forms”
- Choose the year needed
- Select “opt-in”
Q: Which expenses qualify for the American Opportunity or Lifetime Learning Credits?
A: You need to contact your tax preparer or the IRS if you have questions concerning how to use the 1098T tax form for your taxes. There are several good websites that have helpful information on how to use the credit such as www.irs.gov. Use search criteria American Opportunity credit or Lifetime Learning Credits.

Q: Why is box #1 blank?
A: Kent State like many other universities, does not use box #1. Instead they use box #2 to report students billed tuition and qualified fees which does not include room, food, and books.

Q: Why does box #2 not include last spring’s tuition?
A: Kent State is required by the IRS to report the registration during that tax year it happened and not the academic year. Since KSU invoices for spring tuition in December for pre-registered students, it is reported with the prior tax year. Therefore, students need to look on their prior year’s form.

   Example: Student was pre-reregistered for classes for spring term 2014. That means her/his classes were billed in December 2013, or during the 2013 tax year, and would have been included in the student’s 2013 1098T tax form.

Q: Why is box #2 blank but an amount is listed in box #5?
A: As noted in the answer above, class registration is listed in the tax year it happens. The same goes for scholarships and grants. Since they transfer to the student account in January, they are listed on the 1098T tax for that year.

Q: How do I access my 1098T information if I have not opted to receive the form electronically?
A: A student can view and print a copy of their 1098T through their Flashline account. Keep in mind, the information will not be available until after the forms are mailed or after January 31.
   • Log in to Flashline and click on the “My Account” tab
   • Select “1098T Tax Forms”
   • Choose the year needed

You may find useful information relating to 1098T on the IRS website at these following web addresses.
   • http://www.irs.gov/Individuals/Students
   • http://www.irs.ustreas.gov/Individuals/Parents

Kent State University has also produced a video to provide more information about the 1098T.
tax form. You can access the video here (link coming soon)