1098T FAQs

- What is the 1098-T Tuition Statement?
  - The 1098-T Tuition Statement is an informational form filed with the IRS that assists students and their families in calculating educational tax benefits outlined in IRS Publication 970.
    - Note that any students whose qualified tuition and related charges are entirely waived or paid entirely with scholarships (including stipends) will not be issued a Form 1098-T for 2016.
  - An explanation of each box is also printed on the back of the 1098-T Tuition Statement.

- What is included in Box 2 of the 1098-T Tuition Statement?
  - Box 2 of the 1098-T Tuition Statement consists of qualified charges for educational expenses, including tuition, course fees, registration fees, and matriculation fees. Qualified charges do not include insurance, medical expenses, room and board, late penalties, transportation, and/or personal living expenses.

- What is included in Box 5 of the 1098-T Tuition Statement?
  - Box 5 of the 1098-T Tuition Statement consists of scholarships and grants that a student receives during the calendar year. These scholarships and grants could be called tuition awards, tuition fellowships, scholarships, grants, third party sponsorships, stipend payments, stipend fellowships, stipend scholarships, or similar such terms. Note: starting with the 2016 calendar year (and each year going forward), stipend payment information disbursed to the student in the calendar year will now be included in Box 5 of the 1098-T Tuition Statement. Also, third party sponsorships are moving from being reported in Box 2 to being reported in Box 5.

- How do I get the details for the amount in Box 5?
  - Log into GWEB
  - Select 'Student Records and Registration'
Select 'Student Accounts Menu'

Select 'Tax Notification'
Welcome! You have selected the Student Accounts Menu. Choose from the list of options below:

- View statements, pay online, authorize additional users, setup electronic refund profiles
- Account Summary by Term
- Select Tax Year
- Tax Notification
- Account Detail for Term
- Request For Refund
- View Refund Status
- Student Authorization

To view your class schedule, return to the Student Records and Registration menu and click on the Schedule by Day and Time link, or click the Student Detail Schedule link to view your course schedule.

For other options, please click the Help link at the top of your screen.

Enter the applicable tax year (e.g. 2016)

Scroll down to view the components of each applicable box
Does the stipend payment information shown in GWEB or Student eBill mean that I received or will receive an additional stipend payment?

- No. The stipend payment information shown in GWEB or Student eBill reflects a summary of the stipends you received in tax year 2016. It is being added to your student account as of 12/31/16.

Why doesn’t the Box 5 amount on my 1098-T match my award letter?

- Awards may cross tax years since they typically follow the academic year. The 1098-T is an IRS form that is completed for a tax year, running from January 1 through December 31. Therefore, the amount on the 1098-T Box 5 represents
the amount paid within a calendar year, not what was paid within an academic year. Box 5 may also include other scholarships.

- **How do I receive the 1098-T Tuition Statement?**
  - You have two options for receiving your 1098-T Tuition Statement: 1) online and 2) by mail.
  - To receive the 1098-T Tuition Statement online, you need to opt in to receive your 1098-T electronically. If you would like to receive your 1098-T Tuition Statement electronically (and haven’t already done so), please take the following steps:
    - Login to the GWeb Information System
    - Select the ‘Student Records and Registration’ menu
    - Select ‘Student Accounts’
    - Select ‘Student Authorizations’

  Note: The Student Authorizations also includes the opportunity to provide consent to allow GW to contact you via your cell phone for business purposes and to the select the appropriate option related to your Title IV authorizations. These elections are completely voluntary, are not a condition of admission or attendance, and will remain in effect unless or until updated by the student. The elections may be changed at any time via GWeb or by providing written advice via email to saobilling@gwu.edu. Changes in your elections will not be retroactive.

  Please review each item carefully before you select your responses. You do not need to click the ‘Submit Survey’ button to submit your responses, only navigate to the next question. If you click the ‘Submit Survey’ button you will not be able to make additional changes via GWeb until the following day. You can also change your authorizations by sending an email to saobilling@gwu.edu.

- **When do I receive the 1098-T Tuition Statement?**
  - The 1098-T Tuition Statement is available online around January 31. The 1098-T Tuition Statement is mailed annually by January 31 and should be received shortly thereafter.

- **Where do I go for additional help?**
  - For help on the 1098-T Tuition Statement
    - Contact ECSI, GW’s service provider for the Tuition Statement, at 1-866-428-1098.
    - As a reminder, neither ECSI nor GW can provide an explanation of the requirements for (and how to calculate) any education credit that you may claim. Please consult your own tax advisor for help in determining how this report impacts your individual tax situation.
  - For help on the components of Box 5 on the 1098-T Tuition Statement and on the transactions in GWEB and Student eBill:
    - Contact SAO at 202-994-7350 or via email at SAO@gwu.edu.
For help on specific detailed questions related to stipend payments
  ▪ Contact AP Customer Service via apcustsv@gwu.edu.