What is a 1098-T tax form?
The 1098-T form is used by eligible educational institutions, including Stanford University, to report information about its degree-seeking students to the IRS as required by the Taxpayer Relief Act of 1997.

The form is Stanford’s report to you of the amount of tuition and related expenses that have been billed to you during the calendar year as well as any scholarships or grants that have been credited to your account during that year.

Information included:
- Student name
- Address
- Social security number OR tax identification number
- Enrollment status
- Academic status
- Amount billed for qualified tuition OR amounts paid for qualified tuition
- Scholarship or grant amounts; and
- (If applicable) Adjustments to prior year’s qualified tuition and/or adjustments to prior year scholarships

What are students supposed to do with the form when they receive it?
The 1098-T form simply is a reminder that students (or their parents) may have tax reporting responsibilities or may have the opportunity to take an education tax credit.

Who receives a 1098-T form?
Students who are U.S. citizens OR permanent residents and whose enrollment credits are leading to a post-secondary degree will receive a completed 1098-T form from Stanford University.

Who does not automatically receive a 1098-T form?
The following students do not receive a 1098-T form:
- nonresident alien (international student)
- students enrolled in courses for which no academic credit is offered and/or which do not lead to a post-secondary degree (e.g. continuing studies student or high school summer student)
- students whose tuition is entirely waived or paid by scholarships and/or grants
- students with a Third Party Contract which pays 100% of tuition

When do students receive the 1098-T form?
Student Financial Services sends 1098-T forms out to students by January 31st of each year.

Electronic delivery
Students who have opted in to electronic receipt of the 1098-T form in Axess (recommended) before December of the previous year will receive an email notifying them when their 1098-T form is ready to view and print in Axess.

Mail delivery
A paper copy of the 1098-T forms is completed and mailed on or before January 31st for students who did not opt for electronic delivery. The 1098-T form is mailed to the student at the Permanent Home Address listed on Axess.
What do I use if I do not have a 1098-T?
Log into Stanford ePay or your Axess account and click on “View Financial History by Term” under Finances as an official record of account in lieu of a 1098-T.

I no longer have access to Axess and need a copy of my 1098-T?
To obtain a copy of your 1098-T form, contact the Student Services Center.

What is the definition of qualified educational fees?
All tuition related fees, (which may include small fees for special PE classes, or lab fees). Documents Fee, Student Activities Fees.

I just became a US resident and need a copy of the 1098-T?
To obtain a copy of your 1098-T form, contact the Student Services Center or submit a HelpSU ticket.

Where can I get general 1098-T form information?
Official IRS Guidelines:  
irs.gov/publications/p970/index.html

Education Tax Credits (overview information for students):  
http://www.irs.gov/uac/Am-I-Eligible-to-Claim-an-Education-Credit%3F

Who should a student contact with questions about the content of their 1098-T form?
Students can contact the Student Services Center with any questions about the content of the 1098-T or to request a 1098-T be provided.

What do the values in Box 6 mean?
Box 6 shows an amount of scholarships or grants reported on a 1098-T in a prior year that were subsequently adjusted or reduced in the current tax year. In most Stanford cases, Box 6 adjustments are the consequence of departments or the Financial Aid Office changing the source of aid from one internal account to another. When departments make this change, it creates a deficit from a prior year (Box 6) and this amount is then included in Box 5 along with the current year’s aid. If you have Box 6 adjustments, please request an itemized breakdown for further assistance and explanation. You may want to speak with a tax consultant to understand how to include box 6 into your calculations.