In order to apply for the Lifetime Learning Credit you will need your 1098-T form in addition to the 8863 IRS form available at www.irs.gov.

The 1098-T form will cover charges, not payments for the following: Summer 2009, Fall 2009, Winter 2009, and Spring 2010. Changes to your Spring 2010 schedule after January 14, 2010 may not be included on your 2009 1098-T form. This form is to be used as a guide. Please contact a tax preparer or your personal tax advisor to answer questions in regards to completing your federal income tax return.

Note: Institutions may elect to report either the aggregate amount of payments received for qualified tuition and related expenses (box 1), or the aggregate amount billed for qualified tuition and related expenses (box 2) for individuals enrolled who paid or were billed for qualified tuition and related expenses during the calendar year. DTS uses box 2.

However, the credits are allowable only for amounts paid during the year and not amounts reported as billed, but not paid, during the year. When claiming a tax credit, the taxpayer’s financial records serve as the official supporting documentation for calculating the amount being claimed.

If you have questions regarding your form call 1-877-467-3821 or go to www.1098t.com. You are able to view and print your 1098-t from www.1098t.com if you haven’t received it by mail.

Steps to View and Print 1098-T Form for tax purposes

Step 1: Go to www.1098t.com.
Step 2: Click on Access my record from the column on the left side of the screen.
Step 3: Enter Social Security # and Last name and follow prompts to set up PIN (Note: You may login using your DTS ID# instead. To do so, please follow the link to login with your school identification number).
Step 4: After getting in, click on View my 1098-t Tax Record from column on left side of the screen.
Step 5: You may print 1098 form from browser window by clicking File-Print from the menu bar.
Step 6: Use back button to return to previous menu and choose Log Off from the column on the left.