

1098-T FORMS

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.treas.gov. At the website choose forms and publications at the bottom of the page and follow the prompts to print off the 8863 form.

The 1098-T form will cover charges, not payments for the following: Summer 2008, Fall 2008, Winter 2008, and Spring 2009. This form is to be used as a guide.

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 should be able to view and print your 1098-t from the website 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
- 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.