

## Important Updates and Reminders regarding your 2021 1098-T form.

- In order to receive your 1098-T electronically and view online, you must provide consent by **January 7<sup>th</sup>, 2022**. Please click [here](#) for step-by-step instructions for consenting to electronic delivery of your 1098-T. Even if you consented to electronic delivery of your Form 1098-T in the past, it is necessary to renew consent for 2021. If you do not grant consent, your Form 1098-T will not be available to view or print online.
  - Dolphin email accounts should be checked regularly for updates and general information regarding Form 1098-T.
  - Students must provide a correct social security number (SSN) or individual taxpayer identification number (ITIN) by **January 7<sup>th</sup>, 2022**. Wrong information on file could result in fines imposed on the student by the Internal Revenue Service (IRS). For the protection of personal information, **do not** send any SSN or ITIN documents via email. To learn how to update this information, please reference the 1098-T FAQs.
- 

## IRS Form 1098-T FAQs

### 1. WHAT IS THE 1098-T TAX FORM?

The 1098-T tax form is a Tuition Statement provided by higher education institutions to all eligible students who paid for Qualified Tuition and Related Fees (including non-resident tuition) during the 2021 calendar year. The form contains information about qualified tuition and related expenses to help determine whether you, or the person who can claim you as a dependent, may claim an education credit to reduce Federal income tax. For more information, see IRS Pub. 970, Tax Benefits for Higher Education.

The University is required to file 1098-T Tax Forms (*Tuition Statement*) with the Internal Revenue Service (*IRS*). Details of charges and payments posted to your account can be obtained via your myCI portal.

More information on the 1098-T form can be found [here](#) or by contacting the IRS at: 1-800-829-1040.

### 2. WHEN WILL THE 1098-T FORM BE AVAILABLE?

CSUCI is required to make the form available no later than January 31<sup>st</sup> following the tax year. Generally, it is available prior to that date for students that have consented to receive the form electronically via their myCI portal.

**IF YOU DO NOT PROVIDE CONSENT**, your Form 1098-T will be mailed to your address on file in your myCI account by January 31st, 2022.

If your mailing address has changed, follow the [How to Update Your Personal Contact Information](#) instructions to change your address online.

### 3. TO RECEIVE YOUR FORM 1098-T ELECTRONICALLY

All eligible CSUCI students can consent to view, print and save their 1098-T form via their myCI account. The 2021 forms will be available on or before January 31, 2022. If you have not consented to receive your form electronically, log into your myCI account and go to:

- CI Records > Student Center > Finances

- Click on “view 1098-T” from the drop down menu and click the circle with the double arrows
- Click on the “grant consent” button
- Click “yes” after you have read and agree to the Consent agreement.
- Consent is only required to be given once and is valid until canceled in writing.
- Students can withdrawal from receiving an electronic form at any time. Please reference question #14 for more information.

#### **4. WHAT ARE THE BENEFITS OF RECEIVING MY FORM ELECTRONICALLY?**

- Receive the form earlier than traditional mailing
- Eliminate the chance of having the form lost, misdirected, misplaced or delayed in the mail
- Locate your form anywhere with internet access, 24/7
- Help CSU Channel Islands reduce waste and go paperless

#### **5. WHERE CAN I FIND MY ELECTRONIC FORM 1098-T?**

To access your Form 1098-T online, please follow the instructions in the [Electronic consent for Form 1098-T](#) guide.

#### **6. WHY DID I NOT RECEIVE A 1098-T FORM?**

CSU Channel Islands is not required to file Form 1098-T or furnish a statement for:

- Non-credit program courses without Continuing Education Units (CEU), even if the student is otherwise enrolled in a degree program.
- The student account does not reflect any payments during the calendar year.
- The paper copy of the 1098-T Form was mailed to the address on file and returned by the US Postal Service. Students must keep their address current through their myCI account.
- The student is a non-resident alien.

#### **7. WHY IS MY SOCIAL SECURITY NUMBER (SSN) OR INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER (ITIN) REQUIRED FOR THE 1098-T TAX FORM?**

- Federal regulations require students to furnish their Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) to ensure that informational return from CSUCI to the IRS is accurately reported.
- These requirements apply to any student, regardless of whether the student seeks or intends to seek the American opportunity tax credit (formerly “Hope credit”) or Lifetime Learning Credit.
- A student who does not provide a correct SSN or ITIN, can be subject to a fine imposed by the IRS.
- All students must verify that their SSN or ITIN information is accurate with the University and submit updates by January 7<sup>th</sup>, 2022, to the Registrar’s office on campus. See below for more information.

## **8. THE SOCIAL SECURITY NUMBER (SSN) OR INDIVIDUAL TAXPAYER IDENTIFICATION NUMBER (ITIN) ON MY FORM 1098-T IS MISSING OR INCORRECT. WHAT SHOULD I DO?**

The single, most important information on the form is the student's SSN or ITIN. Without your SSN/ITIN, the University cannot properly report an informational return with the IRS. The student's SSN/ITIN must be correct. To update this information, take action immediately by following the steps below:

*\*\*Note: For the security of your information, do not send this information via email! \*\**

- By January 7<sup>th</sup>, 2022, complete the the [Correction of Demographic Information Form](#), and submit both the form and corresponding legal documents by logging into your [myCI portal](#) and clicking on the "Demographic Corrections" service icon. Incomplete submissions will not be processed.

## **9. THE NAME ON THE FORM IS INCORRECT OR HAS BEEN CHANGED, HOW CAN I GET IT CORRECTED?**

For IRS purposes, the name on your Social Security card must match the name on file with the University. To correct information with the University, complete the steps below:

*\*\*Note: For the security of your information, do not send this information via email! \*\**

- Complete the [Legal Name Change/Name Correction Request](#) form found at [https://www.csuci.edu/records-registration/rec\\_reg\\_library.htm](https://www.csuci.edu/records-registration/rec_reg_library.htm) and submit the form, along with copies of legal documentation, via your myCI portal by clicking on the "Demographic Corrections" service icon.

## **10. I MADE A PAYMENT IN DECEMBER, WHY DOESN'T IT SHOW UP IN BOX 1 ON MY FORM?**

All in-person payments and/or mailed payments with Student Business Services must have been received by close of business on December 22<sup>nd</sup>, 2021 to be posted and reflected on the 2021 1098-T form. All electronic payments must have been posted by December 30<sup>th</sup>, 2021.

## **11. CAN YOU TELL ME HOW TO USE THE 1098T INFORMATION WHEN FILING MY TAXES?**

California State University Channel Islands does not assist in tax preparation, act as a tax consultant, provide tax advice, and cannot answer your tax questions. Please consult a tax professional or the Internal Revenue Service (IRS) with your tax questions. Each student and/or parent(s) must determine eligibility for, calculation of, and limitation on the tuition for the Education Credits (Hope or Lifetime Learning Credit).

Information for Education Credits can be found on the IRS website Publication 970 or by calling the IRS at 1-800-829-1040.

## **12. CAN MY PARENT(S) OR OTHER PERSONS WHO CLAIM ME AS A DEPENDENT, OR MY TAX PREPARER RECEIVE MY FORM 1098-T DIRECTLY INSTEAD?**

As required by FERPA (Family Education Rights & Privacy Act of 1974), CSUCI or its personnel cannot provide this information directly to parents or other persons who may claim the student as a dependent, or tax preparers.

If you are claimed as a dependent on another person's tax return (such as your parent's return), please give your Form 1098-T and Supplemental Information directly to that person.

## **13. HOW DO I REVOKE MY CONSENT TO AN ELECTRONIC FORM 1098-T?**

Eligible students can withdrawal from receiving an electronic form at any time by sending an email to [studentaccounting@csuci.edu](mailto:studentaccounting@csuci.edu) **from the student's CSUCI email account.**

Requests from personal non-CSUCI email addresses will *not* be processed. A confirmation of the request will be sent via email. Once a student revokes their consent, any future 1098-T forms will be mailed to the address listed on the student's myCI account.

For 2021 forms, addresses must be updated in the student's myCI account no later than January 7<sup>th</sup>, 2022, to avoid delays in receiving the form. Forms will be mailed on or before January 31, 2021.

## **14. MY ADDRESS LISTED ON THE FORM 1098-T HAS CHANGED. WILL THIS AFFECT ME?**

The address shown on Form 1098-T is irrelevant for IRS income tax filing purposes. The single most important information on the form is the student's social security number (SSN) or individual taxpayer identification number (ITIN). If you opt to have your form mailed to you, then your address must be current by January 7<sup>th</sup>, 2022 in your myCI account to avoid delays in delivery.

## **15. PRIOR TO 2018, MY FORM 1098-T DID NOT REFLECT DATA IN BOX 1, BUT NOW DATA IS SHOWING IN THAT BOX. IS THIS CORRECT?**

Beginning with tax year 2018, all institutions were required to report payments made for Qualified Tuition and Related Expenses which are reflected in box 1 of the form and no longer produce data in Box 2. This is to ensure a uniform tax reporting process.