

Xavier University of Louisiana

Student Accounts Department

Form 1098-T Information

I. IRS Reporting & Compliance

Form 1098-T is a tax information form that is issued to students for the purpose of determining eligibility for education tax credits. The information on the form is also filed with the Internal Revenue Service (IRS). Xavier University (the University) provides the form to each student who is a U.S. citizen or permanent resident who has made payments of qualified tuition plus related expenses during the calendar year.

II. Issuance of Form 1098-T

A Form 1098-T is produced annually for each student with qualifying account transactions if a valid Social Security or Tax Identification Number was provided to the University. A paper form will be mailed to each qualifying student no later than January 31. Also, Form 1098-T federal tax documents are available to qualified students online by logging into their Banner Web account as follows:

Login Banner Web at: www.xula.edu

- Select "Start Here".
- Click on "My XULA".
- Enter "User Name and Password".
- Click on "Banner Web".
- Click on "Student and Financial Aid".
- Click on "Student Record".
- Click on "Tax Year".
- Enter "Year".
- Click on "Submit".
- Click on "Tax Notification".

A student can select "Another Tax Year to View" for a different reporting period.

III. Additional Information

Below is an explanation of how the University determines the value in each box of the form 1098-T:

Box 1: Payments Received for Qualified Tuition and Related Expenses

Box 1 displays the total amount of payments received **for qualified tuition and related expenses (QTRE)** from all sources during the calendar year. Payments displayed in Box 1 cannot exceed the QTRE. The amount reported is the total amount of payments received, less any reimbursements or refunds made during the calendar year.

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Box 2: Reserved

Beginning for the calendar year 2018, no information is required to be reported in Box 2.

Box 3: Change of Reporting Method

For the tax year 2019, Box 3 is checked to signify the change the University made to report payments Received in Box 1. Prior to 2018, Xavier reported QTRE in Box 2.

Box 4: Adjustments Made for a Prior Year

Box 4 represents a reduction in payments made for QTRE originally billed in a prior calendar year. No information is reported in Box 4 for 2019 for any student, as the University did not report payments made for QTRE originally billed in a prior calendar year.

Box 5: Scholarships or Grants

Box 5 displays the total amount of any scholarships or grants processed during the calendar year for payment of the student's cost of attendance. Scholarships and grants generally include all payments received from 3rd parties (excluding family members and loan proceeds). This includes payments received from governmental and private entities such as the Department of Veterans Affairs, the Department of Defense, civic and religious organizations and nonprofit entities.

Box 6: Adjustments to Scholarships or Grants for a Prior Year

Box 6 displays the amount of any reduction to the amount of scholarships or grants that were reported for any prior year after the calendar year 2002.

Box 7: Amounts for an Academic Period Beginning in January through March 2019

Box 7 is checked if any payments of qualified tuition and related expenses reported for 2019 relate to an academic period that begins in January through March of 2019.

Box 8: At Least a Half-Time Student

Box 8 is checked if the student was at least a half-time student during any academic period that began in 2019. A half-time student is a student enrolled for at least half the full-time academic workload for the course of study the student is pursuing. At Xavier, a half-time student is taking less than 12 hours per semester.

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Box 9: Graduate Student

Box 9 is checked if the student was a graduate student. A graduate student is defined as a student who was enrolled in a program or programs leading to a graduate-level degree, graduate-level certificate, or other recognized graduate-level educational credential.

IV. Form 1098-T Not Received by a Student

A student may not receive a Form 1098-T if any one of the following occurs:

- No payments were received by the University in the calendar year from the student.
- The student received a credit balance refund(s) in excess of the QTRE payment(s) made in the calendar year.
- The student was not billed qualified tuition and related expenses in the calendar year.
- The student QTRE amount was reduced to zero by a tuition waiver.
- A student has not provided the University with a valid Social Security number. A student can provide this information by downloading and completing IRS form W-9S as follows:
 - The IRS form W-9S can be downloaded by clicking here:
<http://www2.xula.edu/fiscal/documents/W%209S%20Request%20For%20Students%20Taxpayer%20ID%20Certification.pdf>
 - By email to Ms. Rebecca Sanchez at rsanche1@xula.edu or Mrs. Avis Stuard at astuard@xula.edu.
 - For name changes, please contact the Office of the Registrar at (504) 520-7583.

Questions?

If you should have any questions regarding the Form 1098-T, please [Contact a Student Accounts Representative](#).