January 7, 2016

Subject: Electronic 1098-T Instructions

Greetings from Student Financial Services.

As the 2016 tax season approaches, we wanted to inform you how to request that your 1098-T tax form be available to you in electronic format through the Student Information System. If you have already requested to have access to your 1098-T tax form electronically, please disregard this message.

1098-T forms, mailed no later than January 31st, report only qualifying charges (NOT your payments), which are tuition, mandatory (comprehensive) fees, and off-grounds fees for 2015. Payments that you made to cover those charges are not reported on the 1098-T form. Tuition for non-credit classes is not a qualifying charge. For 2015, 1098-T forms will reflect charges for the Fall 2015 term (billed in July 2015) and the Spring 2016 term (billed in December 2015). 1098-T forms should be viewable in the SIS after January 25th.

The benefits of receiving your 1098-T electronically are several:

- Earlier access to your information
- Cannot be misplaced
- Access from almost anywhere
- Use less paper and reduce mailing costs

To request electronic-only delivery of your 1098-T form, log in to your SIS Student Center. In the Finances section, choose "View 1098-T" from the drop-down menu. On the subsequent page, choose the "1098t tax form" sub-tab. (DO NOT choose the "student permissions" sub-tab; make sure you are on the "1098t tax form" sub-tab.) Then, click on the green "Grant Consent" button at the bottom of the screen. (If you have previously granted consent for this, you will not see the green "Grant Consent" button.) On the subsequent page, check the box indicating you have read the agreement and click the green "Submit" button. You will be taken to a confirmation screen. After you grant consent to receive electronic-only 1098-T forms, you will no longer be mailed a paper form to your permanent address.

For more complete information on 1098-T forms, including who should expect to receive one, please visit [http://sfs.virginia.edu/tax/1098-t](http://sfs.virginia.edu/tax/1098-t). It is important to remember that not all students will receive a 1098-T form, so please read the information about 1098-T forms carefully before contacting our office. If after reading the additional information you still have questions, please write to us at sfs@virginia.edu or call us at (434) 982-6000 for assistance.

As in all matters related to the tax implications of education expenses, our staff will be unable to advise parents and students. We strongly encourage you to speak with a qualified tax advisor to answer questions specific to you or your student. Information about education credits can be found at [http://www.irs.gov/Individuals/Education-Credits](http://www.irs.gov/Individuals/Education-Credits), and IRS publication 970 regarding tax benefits for education can be found at [http://www.irs.gov/pub/irs-pdf/p970.pdf](http://www.irs.gov/pub/irs-pdf/p970.pdf).

Thank you from Student Financial Services.

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