

January 2024

Dear Student,

The 1098-T document is provided to you for tax reporting purposes only and meets Butler University's obligation for reporting per IRS guidelines. The 1098-T information pertains to the American Opportunity and Lifetime Learning tax credits.

Please keep in mind that you must consult your tax advisor or the IRS for assistance in determining your eligibility for tax credits and interpreting the information provided. The Office of Student Accounts' staff **is not trained in tax preparation** and cannot assist you in determining your eligibility.

The following information details the tax reporting requirements for the individual BOXES on the 1098-T document:

Box 1	Amount includes all PAYMENTS (out of pocket, financial aid, loans, and grants) that applied to TUTION and QUALIFIED FEES between 01/01/2023 and 12/31/2023.
Box 2	Intentionally left blank.
Box 3	Intentionally left blank.
Box 4	Represents TUTION and QUALIFIED Fee/Payment adjustments, reported on a prior year's 1098T.
Box 5	Amount includes scholarships or grants that applied to the student account between 01/01/2023 and 12/31/2023 to pay the student's cost of attendance.
Box 6	Represents scholarship and grant adjustments for a prior year.
Boxes 7, 8, 9	Checked, if applicable.
Box 10	Intentionally left blank.

NOTE: If you would like to review a full history of all charges and credits that have posted to your student account by date, log in to your **my.butler.edu** account, click on *Self Service Student Homepage* then *Student Center* and scroll down to the FINANCES heading. Click on *View Bills* which links you to *TRANSACT*. Click **Statements**, located in the left portion of the screen, click on "Account Activity – Full History (updated once each business day)."

Please keep in mind that any Authorized Payers that you have set up on your account also have access to your 1098T and your Account Activity within *TRANSACT*. If you need to set up an Authorized Payer on your account, please review additional information at <https://www.butler.edu/campus-services/student-accounts/billing-payment/>

1098-T Questions? Additional resources are available at:

<https://www.irs.gov/forms-pubs/about-publication-970> (IRS publication 970)

<https://www.irs.gov/forms-pubs/about-form-8863> (IRS form 8863)

Would you like to EXPEDITE RECEIPT OF YOUR 1098-T for future tax years?

Consent to receive the document electronically:

- ⇒ Log into your **my.butler.edu** account and click on *Self Service Student Homepage* then *Student Center*.
- ⇒ Under the FINANCES heading, click on *View Bills* (which links you to our E-Bill & E-Pay System). Click on *Tax Forms* (left menu), click on *Sign up* under the *Sign up for paperless delivery* heading.

Office of Student Accounts

Butler University

studentaccounts@butler.edu

<https://www.butler.edu/student-accounts>