

## Student Financials 1098-T

### Procedure

Use this lesson to learn how to view and print your 1098-T documents.

If you have questions please contact the Office of Student Accounts office at: (847) 491-5224 or [studentaccounts-ev@northwestern.edu](mailto:studentaccounts-ev@northwestern.edu)

The screenshot shows the Student Center interface. The 'Academics' section is expanded, showing links for Search, Enroll, and My Academics. A message box states 'You are not enrolled in classes.' Below this is a search bar and an 'enrollment shopping cart' link. The 'Financial Services' section is also expanded, listing various services: View My Account, View E-Bill & E-Payment, Make 9PAY Payment, Request a Refund, Apply for Financial Aid, Setup Direct Deposit, Financial Info Permission, and 1098-T. The 1098-T link is highlighted in blue. On the right side, there are buttons for 'SEARCH FOR CLASSES', 'EVALUATE CLASSES', and 'REVIEW EMERGENCY INFO.', along with sections for 'News and Info', 'Holds', 'To Do List', and 'Enrollment Dates'.

Step	Action
1.	From the Student Center go to the Financial Services section and click the 1098-T link. Click the <b>1098-T</b> link. <a href="#">1098-T</a>

The screenshot shows the 'Student Financials' section with the heading '1098-T Consent Agreement and View and Print 1098-T'. Below the heading, there is a text box: 'The 1098-T consent link below allows you to select the preferred method of receiving your 1098-T Tuition Statement information.' Below this text is a link labeled '1098-T Consent'. Further down, another text box states: 'To view the 1098-T Tuition Statement and print the form, please select the "View and Print 1098-T" link.' Below this text is a link labeled 'View and Print 1098-T'. At the bottom of the page, there is a search bar with the text 'go to ...' and a magnifying glass icon.

Step	Action
2.	To receive your 1098-T electronically you must first give your consent. Click the <b>1098-T Consent</b> link. <a href="#">1098-T Consent</a>

**1098-T Consent** 1 | [ ] | [ ]

**1. 1098-T Consent Agreement**

There are several tax benefits that assist students and families in the financing of a college education. The Taxpayer Relief Act of 1997 (TRA97) contains several provisions that you (or the person claiming you as a dependent) may be eligible for, such as a Hope Scholarship or Lifetime Learning tax credit. Alternately, you may be eligible for a tuition deduction. The 1098-T Tuition Statement includes financial information, such as tuition charges, scholarships received and payments made, which you may need for the filing of either of these education credits or the tuition deduction.

The IRS regulations allow Northwestern University to not print and mail a paper 1098-T Tuition Statement if you consent to receive the statement electronically. The 1098-T form will be available on CAESAR and could be printed from CAESAR if necessary. The tax information will be available via CAESAR for the most recent 3 tax years beginning with the tax year 2007 form. Should you no longer have access to CAESAR at the time the form is prepared at the end of January, a paper 1098-T form will automatically be printed and mailed to you.

The consent agreement below can be changed at any time in CAESAR prior to the preparation of the yearly tax form. Any change in consent after the preparation of the yearly tax form will remain in effect for future tax years.

By clicking the box below and pushing the submit button below, I agree to receive my 1098-T Tuition Statement electronically. I understand that I will not receive my 1098-T form via US mail and that the tax information is available in CAESAR.

I agree to receive my 1098-T Tax form electronically through on-line access.

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CANCEL
SUBMIT

Step	Action
3.	Put a checkmark in the agreement box by clicking in it. Click the option. <input checked="" type="checkbox"/>

**1098-T Consent** 1 | [ ]

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CANCEL
SUBMIT

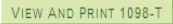
Step	Action
4.	Click the <b>Submit</b> button. 

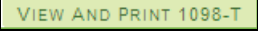
1098-T Consent 

2. 1098-T Consent Confirmation

 You have elected to receive your 1098-T Tuition Statement electronically. The tax information is available in CAESAR under 1098-T > View and Print 1098-T. The consent agreement can be changed at any time in CAESAR prior to the preparation of the yearly tax form. Any change in consent after the preparation of the yearly tax form will remain in effect for future tax years.

Push the View and Print 1098-T button to view your 1098-T information.



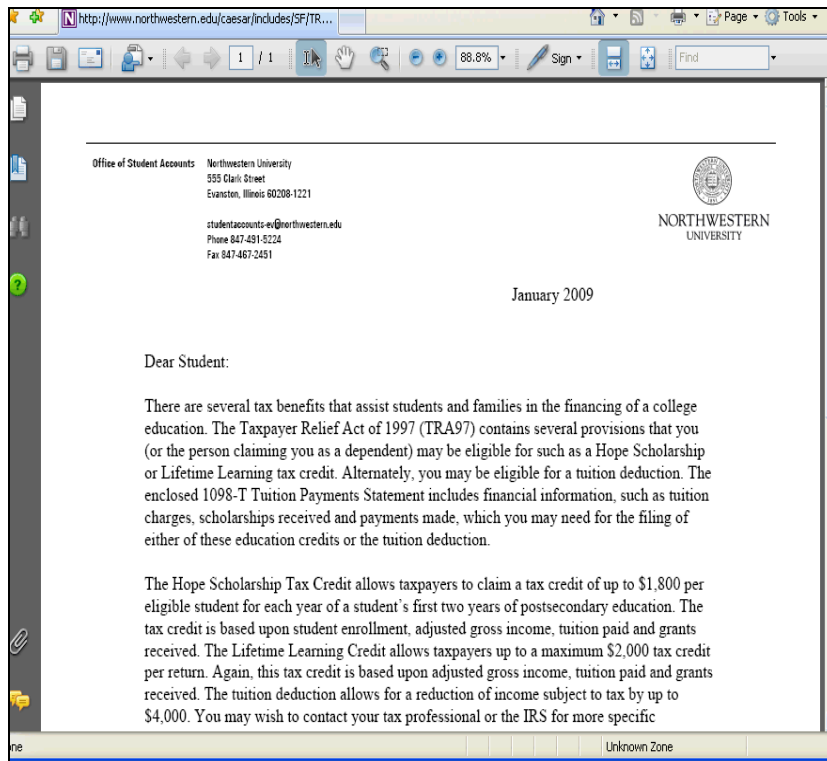
Step	Action
5.	After you have successfully submitted your consent, you will receive a confirmation and can move on to view and print your 1098 -T.
Step	Action
6.	Click the <b>View and Print 1098-T</b> button. 


**View & Print 1098 T**

A 1098-T Tuition Statement and its corresponding information letter is available for you to access electronically for the years below. Click on the year to bring up the printable form and its supporting transaction information.

1098-T Year	Report Name
<a href="#">2008</a>	Information Letter
<a href="#">2008</a>	1098-T Form
<a href="#">2007</a>	Information Letter

Step	Action
7.	<p>Select the year in which you wish to view your 1098 -T information.</p> <p>You may view and print an information letter as well as the 1098-T.</p> <p>First view the information letter.</p> <p>Click an entry in the <b>1098-T Year</b> column. <a href="#">2008</a></p>



Step	Action
8.	The letter displays here. You can print it by using your browsers print function. Click the <b>Print button</b> object. 

### View & Print 1098T


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1098-T Year	Report Name
<a href="#">2008</a>	Information Letter
<a href="#">2008</a>	1098-T Form
<a href="#">2007</a>	Information Letter
<a href="#">2007</a>	1098-T Form

Step	Action
9.	To view and print the 1098 -T form, select the year you wish to view. Click an entry in the <b>1098-T Year</b> column. <a href="#">2008</a>

CAESAR Report Generator  
Generating 1098-T Form

Please wait while 1098-T Form is being generated...

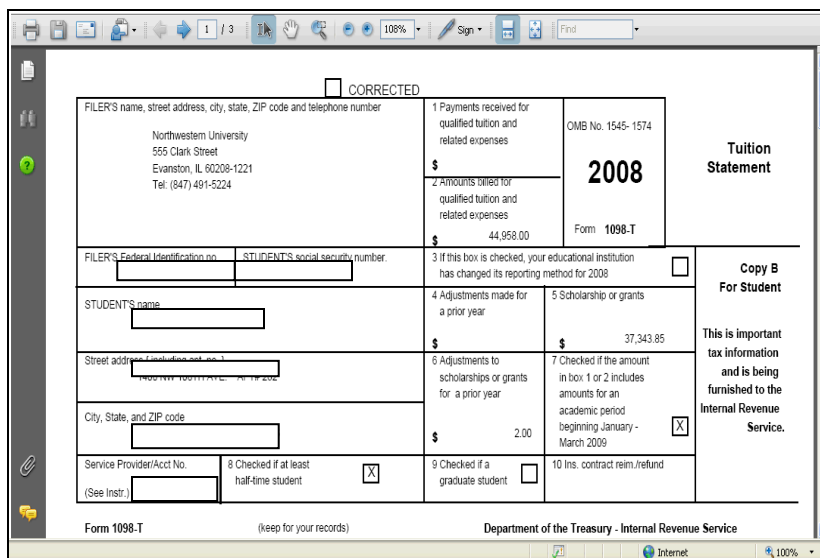


Step	Action
10.	Your 1098 - T will be generated.

CAESAR Report Generator  
1098-T Form Complete

Click to view your [1098-T Form](#).

Step	Action
11.	Click the <b>1098-T Form</b> link. <a href="#">1098-T Form</a>



CORRECTED

FILER'S name, street address, city, state, ZIP code and telephone number  
Northwestern University  
555 Clark Street  
Evanston, IL 60208-1221  
Tel: (847) 491-5224

1 Payments received for qualified tuition and related expenses  
\$  
2 Amounts billed for qualified tuition and related expenses  
\$ 44,958.00

OMB No. 1545-1574  
**2008**  
Form 1098-T

Tuition Statement

FILER'S Federal Identification no. STUDENT'S social security number.  
STUDENT'S name  
Street address (For use by IRS)  
City, State, and ZIP code  
Service Provider/Acct No. (See Instr.)

3 If this box is checked, your educational institution has changed its reporting method for 2008

4 Adjustments made for a prior year  
\$  
5 Scholarship or grants  
\$ 37,343.85

6 Adjustments to scholarships or grants for a prior year  
\$ 2.00

7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2009


8 Checked if at least half-time student

9 Checked if a graduate student

10 Ins. contract reim./refund

Copy B For Student  
This is important tax information and is being furnished to the Internal Revenue Service.

Form 1098-T (keep for your records) Department of the Treasury - Internal Revenue Service

Step	Action
12.	The 1098 -T displays here. You can print it by using your browsers print function. Click the <b>Print Button</b> object. 
Step	Action
13.	To go back to your previous page, click your browsers back button. Click the <b>Back</b> button. 