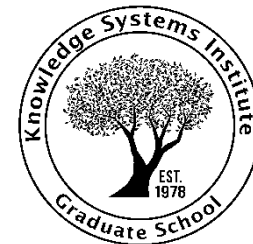


# Knowledge Systems Institute Graduate School



## 1098-T Tax Request Form

Students that have submitted out-of-pocket tuition payments are eligible to request a 1098-T Form. This form can be used to claim the educational tax benefits outlined in IRS Publication 970. Eligibility also includes payments submitted with a loan, for “qualified educational expenses.” IRS Publication 970 defines "qualified educational expenses" as *tuition, fees, and books*. The 1098-T reflects the previous **calendar year** (January through December).

### Is there any reason I might not receive a 1098-T?

- You will **not** receive a 1098-T on the portion of tuition paid with **tax-free educational assistance**. Per IRS guidelines: *If you pay qualified education expenses with certain tax-free funds, you cannot claim a credit for those amounts. You must reduce the qualified education expenses by the amount of any tax-free educational assistance and refund(s) you received.* A 1098-T is, therefore, **not** issued for the portion of tuition paid with **tax-free educational assistance** including:
  - The tax-free part of scholarships and fellowships,
  - Pell grants,
  - Employer-provided educational assistance,
  - Veterans' educational assistance, and/or
  - Any other nontaxable (tax-free) payments (other than gifts or inheritances) received as educational assistance (including CAP and FSEOG grants).
- You will **not** receive a 1098-T if you have a delinquent balance for the calendar year you are requesting a 1098-T.
- You will **not** receive a 1098-T if you do not have a SSN# or ITIN#.

### How do I obtain a 1098-T form?

- To obtain a 1098-T form, **a completed 1098-T Request Form should be submitted to the Administrative Office via email (office@ksi.edu), fax (847-679-3166) or in person by January 21.**
- 1098-Ts are available in the Administrative Office by January 31. Students can pick-up the form, have it mailed, emailed or faxed to them as selected in the *method of form delivery* field below.

#### Student Information:

First Name:	Middle Name:	Last Name:
Mailing Address (street, unit/apt, city, state & zip):		
SSN# or ITIN# (9-digits):		
Method of Form Delivery ( <i>you may select more than one method from the provided list</i> ):		
<input type="checkbox"/> Pick-up from Administrative Office		
<input type="checkbox"/> Mail to Address Above		
<input type="checkbox"/> Fax to:		
<input type="checkbox"/> Email to:		