**TEXAS A&M UNIVERSITY - COMMERCE**

**1098-T Processes and Procedures**

The Office of Financial Services is responsible for processing 1098-T forms for all students who have provided a valid SSN to the Registrars’ office. When a student provides an SSN, the 1098-T data is generated overnight, and will be available in myLeo the next business day. Tax data is also uploaded to the Maximus website, where it is available online.

**Requirements to get a 1098-T form:**

* Students with a payment with a transaction date in the prior tax year (regardless of term).
* Students with a valid SSN (not system generated, ex. pidm <> last 6 digits of SSN).
* Students with a valid address type of Local (L), 1098 Tax Address (T), Billing (B) or Permanent (P).

**Where students can access their 1098-T form:**

* Online, at <https://tra.maximus.com/traPortal/Register>
* Online, at <https://myleo.tamuc.edu>
* Tax forms are generated and mailed to all students in January.
* The 1098-T tax form can be mailed or emailed to a student by request if the mailing or email address matches what is in Banner. (Cannot be mailed to emailed to any other address that is not in Banner)

**Things We Cannot Provide:**

* Student tax information cannot be provided to a parent or spouse. Only when there is a FERPA authorization on file can tax information be shared with a parent.
* Being an authorized user in Touchnet does not give parents access to 1098-t information.  Tax information can be sent it only to the student and they can share it with a parent if they wish.
* Do not share 1098-T information with accountants, tax preparers or other third-parties even if they say that the student/parent authorized them to call.

**Note**

* 1098-t information is available in Banner at TSATAXN
* IRS instructions for 1098-T, at <https://www.irs.gov/pub/irs-pdf/i1098et.pdf>
* About form 1098-T, at <https://www.irs.gov/forms-pubs/about-form-1098-t>
* Spring charges will have an initial effective date after January 1st so that Spring 2023 charges do not show on the 2022 1098-t.