Tax Form Details

Box 1—Total payments from any source received by an eligible educational institution in 2018 for qualified tuition and related expenses less any reimbursements or refunds made during 2018 that relate to payments received during 2018. Please note the amount in Box 1 will NOT equal to or sum to the charges paid for calendar year 2018 because all charges are not considered qualified tuition and related expenses as defined by the Internal Revenue Service. Health Insurance, Housing, Meals, penalties and processing fees are not qualified; therefore, the full amount of the charges and fee paid will not be reported.

Note: If you registered for and paid for Spring 2018 classes in 2017, those payments will not be included on the 2018 1098-T. Also, if you register and pay for Spring 2019 classes in 2018, those payments will be included on the 2018 1098-T.

The amount of your payment reported in Box 1 is limited by the total amount of Qualified Tuition and Related Expenses billed during 2018 calendar year.

Box 2—Used by George Mason University for tax year prior to 2018. Will no longer be used and currently reserved by IRS.

Box 3—Indicates that GMU changed its method of reporting for 2018. This box will be checked for 2018.

Box 4—Is the amount of any adjustments made for a prior year for qualified tuition and related expenses that were reported on a prior year Form 1098-T. This amount may reduce any allowable education credit you may claim for the prior year. See Form 8863 or the IRS Pub 970 for more information. This box will be blank for 2018 as 2018 is the first year the University has reported payments.
Box 5—Includes the total amount of any scholarships or grants that were administered and processed during the calendar year for the payment of the student’s costs of attendances. All payment received from third parties such as governmental and private entities will be reported.

Box 6—The amount of any adjustments made for prior year scholarships, grants, and fee waivers that were reported on a prior year Form 1098-T. This amount may reduce any allowable education credit you can claim for the prior year.

Box 7—Will be checked if the amount in Box 1 includes amounts for an academic period beginning January–March 2019. See the IRS Pub 970 for how to report these amounts when this box is checked.

Box 8—Indicates whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at GMU.

Box 9—Indicates whether you are considered to be enrolled in a program leading to a graduate degree, graduate-level certificate, or other recognized graduate-level educational credential.

Box 10—Will always be blank on any 1098-T form you receive from GMU.