

Student Tax Documents

W-2 (Wages)

Student employees will be sent W-2 forms by January 31st of each year. To ensure forms are received without delay, please contact the Human Resources Office immediately if you have a change of address. Duplicate forms may be requested from the Payroll Office at (615) 963-7607 or at bhickson@tnstate.edu. Duplicates will be mailed after February 15th, and only after correct addresses have been entered into the system by the Human Resources Office.

1098-T (Hope and Lifetime Learning Tax Credits)

In compliance with the Taxpayer Relief Act of 1997 (TRA97), 1098-T tax statements will be available for students on myTSU each year. The statements will reflect amounts billed for qualified tuition and related expenses. The statements are for their use in determining if they are eligible for the Hope Scholarship Tax Credit or the Lifetime Learning Credit. The information provided in Box 2 is the amount of qualified tuition and related expenses charged during the calendar year. Items such as room and board, books, supplies, etc., are not included as they generally do not qualify for the credits. Box 5 is the total of grants and scholarships applied to those expenses. These items generally offset and reduce the amount of qualified expenses eligible for the credits.

Since the statements will not be mailed, students should access myTSU @ <http://mytsu.tnstate.edu> to print the 1098T Tax Statements on January 31st each year (Parents will need to coordinate login information with students). The parent, guardian, or student will be responsible for reporting to the IRS amounts actually paid out-of-pocket or with borrowed funds during the tax year for qualified tuition and related expenses. For assistance contact the Bursar's Office at (615) 963-5472 or (877) 288-0028.

To print the 1098T, access myTSU and do the following:

- Click on Banner Services
- Click on Student tab
- Select Student Account
- Select Tax Notification

For assistance logging into myTSU, please call the Help Desk at (615) 963-7777.

1098-E (Interest on Student Loans)

Also in compliance with TRA97, students who pay interest on Perkins Loans will be sent a 1098-E form by January 31st. Please contact University Accounting Services at 1-800-999-6227 if you have had a change of address. (The Tennessee State University representative at University Accounting Services is Ms. Kathleen Buchwald.) Duplicate forms may be requested directly from University Accounting Service after February 15th, and only after correct addresses have been entered into the system by the Tennessee State University Records Office.

If you would like additional information on the 1098-T or 1098-E, please contact your tax consultant or the Internal Revenue Service at www.irs.ustreas.gov, as Tennessee State University may not provide tax advice or make a determination regarding your eligibility to claim these credits.

