

☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number INDIANA UNIVERSITY 1024 E 3rd St Room 132 Bloomington IN 47405 Office of the University Controller 812/855-0375		1 Payments received for qualified tuition and related expenses \$ 9955.78	OMB No. 1545-1574 2023 Form 1098-T
		2	
FILER'S employer identification no. 356001673	STUDENT'S TIN *****3741	3	
STUDENT'S name Kundwa Mushumba		4 Adjustments made for a prior year \$	5 Scholarships or grants \$
Street address (including apt. no.) 15131 Troxel Dr W Apt 104		6 Adjustments to scholarships or grants for a prior year \$	7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2024 <input type="checkbox"/>
City or town, state or province, country, and ZIP or foreign postal code Noblesville IN 46060-5843 USA			
Service Provider/Acct. No. (see instr.) 2001255310	8 Checked if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$

Tuition Statement

Copy B For Student

This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return.

Form **1098-T**

(keep for your records)

www.irs.gov/Form1098T

Department of the Treasury - Internal Revenue Service

Instructions for Student

You, or the person who can claim you as a dependent, may be able to claim an education credit on Form 1040 or 1040-SR. This statement has been furnished to you by an eligible educational institution in which you are enrolled, or by an insurer who makes reimbursements or refunds of qualified tuition and related expenses to you. This statement is required to support any claim for an education credit. Retain this statement for your records. To see if you qualify for a credit, and for help in calculating the amount of your credit, see Pub. 970, Form 8863, and the Instructions for Form 1040. Also, for more information, go to www.irs.gov/Credits-Deductions/Individuals/Qualified-Ed-Expenses.

Your institution must include its name, address, and information contact telephone number on this statement. It may also include contact information for a service provider. Although the filer or the service provider may be able to answer certain questions about the statement, do not contact the filer or the service provider for explanations of the requirements for (and how to figure) any education credit that you may claim.

Student's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS. **Caution:** If your TIN is not shown in this box, your school was not able to provide it. Contact your school if you have questions.

Account number. May show an account or other unique number the filer assigned to distinguish your account.

Box 1. Shows the total payments received by an eligible educational institution in 2023 from any source for qualified tuition and related expenses less any reimbursements or refunds made during 2023 that relate to those payments received during 2023.

Box 2. Reserved for future use.

Box 3. Reserved for future use.

Box 4. Shows any adjustment made by an eligible educational institution 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

that you claimed for the prior year (may result in an increase in tax liability for the year of the refund). See "recapture" in the index to Pub. 970 to report a reduction in your education credit or tuition and fees deduction.

Box 5. Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of the education credit you claim for the year.

TIP: You may be able to increase the combined value of an education credit and certain educational assistance (including Pell Grants) if the student includes some or all of the educational assistance in income in the year it is received. For details, see Pub. 970.

Box 6. Shows adjustments to scholarships or grants for a prior year. This amount may affect the amount of any allowable tuition and fees deduction or education credit that you claimed for the prior year. You may have to file an amended income tax return (Form 1040-X) for the prior year.

Box 7. Shows whether the amount in box 1 includes amounts for an academic period beginning January–March 2024. See Pub. 970 for how to report these amounts.

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

Box 9. Shows 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. Shows the total amount of reimbursements or refunds of qualified tuition and related expenses made by an insurer. The amount of reimbursements or refunds for the calendar year may reduce the amount of any education credit you can claim for the year (may result in an increase in tax liability for the year of the refund).

Future developments. For the latest information about developments related to Form 1098-T and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1098T.

Free File Program. Go to www.irs.gov/FreeFile to see if you qualify for no-cost online federal tax preparation, e-filing, and direct deposit or payment options.

Calendar Year 2023

Indiana University is required to report only specific types of transactions on Form 1098-T. Please note that this form may not reflect all eligible transactions that a taxpayer may use to compute their income tax credit or deduction. The IRS expects the taxpayer to maintain adequate records to support any information used when preparing their individual income tax return. Form 1098-T is an informational statement intended to serve as a guide for the taxpayer. The taxpayer should refer to their own financial records when calculating the eligible amount that can be claimed for any educational related income tax credits or deductions.

Please refer to IRS Publication 970 (www.irs.gov) or the "Tax Benefits for Education: Information Center" located on the IRS website at <http://www.irs.gov/newsroom/article/0,,id=213044,00.html> for more information.

Payments applied to qualified tuition and related fees during the calendar year, from any source, are reflected below. Please note, the payments reported may include qualified tuition and related fee payments associated with terms that did not begin during the calendar year.

Received for Qualified Tuition & Related Expenses			
Campus	Term	Item Description	Item Amount
KO	Spring 2023	Aggregated Mandatory Fee	\$210.00
KO	Spring 2023	Online Collab UG Tuit InState	\$750.00
KO	Summer 2023	IU eTexts Fee	\$95.00
KO	Summer 2023	Aggregated Mandatory Fee	\$840.00
KO	Summer 2023	Online Collab UG Tuit InState	\$3,000.00
KO	Fall 2023	IU eTexts Fee	\$110.78
KO	Fall 2023	Online Student Services Fee	\$600.00
KO	Fall 2023	Online Collab UG Tuit InState	\$4,350.00
		Total:	\$9,955.78