

Dear SCU Student,

This email contains critical information about the annual IRS 1098-T form. It may be helpful to forward this email to anyone assisting with paying your education-related expenses.

The annual 1098-T form has been prepared for calendar/tax year 2020. You can obtain a copy of your 2020 Form 1098-T from our vendor, Tab Service Company, (TABS), by logging into the website below with the following information:

Website: www.tsc1098t.com

Site ID: 11477

Username: 11-Digit Student ID# (ex. 00009999999)

Password: **For first time users only:** The last 4 digits of your social security number (SSN) will only work if it is the first time you are logging into the site. For security reasons, you will be prompted to change your password after your initial login.

Returning students utilize their password from the prior year. If you forgot your password, please select “Forgot Password? Click Here” from the login screen on the TABS website. An automated email will be sent to your email address on file, and allow you to reset your password. If no email address is on file, you will receive a message stating no information found.

The new password must be at least 8 characters and contain at least one upper case letter, one lower case letter, one numeric character and one special character.

Please note that Santa Clara University does not mail any forms in order to reduce our carbon footprint and limit access to sensitive personal information. Electronic forms consent is provided at the time you agree to the University Terms and Conditions.

The Form 1098-T provides information related to payments received in the calendar year for qualified tuition and related expenses (QTRE). Therefore, you will see payments from all sources received for QTRE in the calendar year reported in Box 1.

Scholarships and grants administered by the University are reported in Box 5 on the form.

For clarification on what types of payments and scholarships and grants are included in the 1098-T form reporting, please refer to the Bursar's website: www.scu.edu/bursar.

The University is required to prepare and submit to the IRS a 1098-T form for all U.S. citizens. If you did not provide your SSN to the University during the application process or have not completed a W-9S form, then you may not have a 1098-T form. Please contact the OneStop Office to complete a W9-S form if you wish to receive a 2020 Form 1098-T. We will accept completed W-9S forms **until** March 15, 2021.

Santa Clara University is not required to provide a 1098-T form for:

- students in a non-degree program
- students who were not enrolled in the calendar year
- students without qualified charges in the calendar year
- non-resident aliens/international students*
- students whose QTRE is paid entirely with scholarships/grants, including government agencies such as Veteran's Affairs and the Department of Defense.

**Non resident aliens/international students that would like a 1098-T form will have to complete a Form W-9S.*

If you cannot locate your 1098-T form via the TABS website or have an address, name or SSN change, please contact the OneStop office to complete the necessary form(s). If you have issues retrieving the 1098-T form, please contact TABS at (888) 220-2540.

Please note that University staff and TABS representatives cannot provide guidance in regards to the 1098-T form reporting. The IRS regulations prevent inquiries to Form 1098-T preparers. All questions related to educational tax credits need to be directed to the IRS. Please consult a qualified tax preparer for assistance.

The following are some helpful links:

<https://www.irs.gov>

<https://www.irs.gov/individuals/students>

<https://www.irs.gov/pub/irs-pdf/p970.pdf>