

**UNIVERSITY OF CALIFORNIA**  
**TRA Vendor Phone Service**  
**Questions and Issues to Anticipate**

**Form**

1. What am I supposed to do with the notice I just received? What's it for?
2. How do I get a copy of the 1098-T?
3. Why is this notice coming from your company and not from the University?
4. I just found out in 2001 that I was eligible to claim the Lifetime Learning credit in 1998—my last year at UC. I didn't claim the credit in 1998, so now I'm in the process of filing an amended tax return. How do I get a copy of the 1098-T from three years ago?
5. I didn't receive a notice about the amount of student loan interest I paid.
6. I found the notice I received from UC confusing and have some suggestions to how it could be improved. Who do I notify?
7. How much am I eligible to claim? If it's the difference between the amounts paid less the gift aid, why don't you just print the net figure to make it easier for people like me?

**Eligibility**

8. Am I eligible? Which credit can I claim?
9. I am a foreign student and do not have a Social Security Number. Do I have to get a Taxpayer Identification Number just for this purpose, even though I am ineligible to claim it?
10. I am a foreign student. Do I qualify for either credit?
11. I was a sophomore in the Spring of 1998 and a junior in the Fall of 1998. Which credit can I claim, or can I claim both but each for just the applicable portions of the eligible tuition and fees that I paid?
12. The amount of "qualified tuition and related expenses" reported is less than the amount I paid to the school. Which fees don't qualify?
13. The term "qualified tuition and related expenses" seems to imply that it might include books and supplies, which are included for purposes of determining which gift aid should be treated as taxable income. Are you should that the definition for the tax credit isn't the same—as for determining taxable income?
14. If UC requires that I pay certain fees in order to be registered, then why can't I include all those mandatory fees as "qualified tuition and related expenses"?
15. I took a one-day extension class. Am I eligible for the credit?
16. I took a wine tasting/floral design/salsa dancing class from Extension. Can I claim the credit?
17. I graduated from high school last year, and now I am taking classes through Extension. Am I eligible for the Hope Scholarship?
18. I've taken several Extension classes over a period of years (more than two); am I still eligible for the Hope Scholarship?
19. I am an Extension student. What constitutes "half-time student"?
20. I am Student X's ex-spouse. I paid all of Student X's expenses while he/she was attending school last year. Now that the ?@#! has graduated and is making lots of money, he/she is divorcing me. Since I paid those expenses, I want to claim the credit. Can I?

21. I've been taking tennis classes through the community college for the last four years. Now I'm enrolled at UC as a freshman. Am I still eligible for the Hope Scholarship?
22. I (the student) received the 1098-T and assumed that I was eligible to claim the credit. My parents, however, are telling me that they, not me, are the only ones who can claim the credit. Who's right? Can we both claim it?
23. I was a freshman in Fall 1998, carried at least a half-time academic load, but did very poorly. Now I'm on academic probation. Do I qualify for the Hope Scholarship for 1998?
24. I entered as a freshman in Fall 1998 and expect to complete my four years of college at UC. If I claim the Hope Scholarship for the tax year 1998, I won't get a complete year's worth of Hope Scholarship credit for that year. How can I maximize my eligibility for the Hope Scholarship since it can only be claimed for two tax years?
25. I was a freshman in Fall 1998 and initially had a full academic load, but then I dropped all but one class. Do I qualify for the Hope Scholarship for 1998?
26. My parents' make about \$90,000. Can they still claim either the Hope Scholarship or Lifetime Learning Credit?
27. I want to pay my Winter quarter/Spring semester fees in 1999 rather than in December 1998.
28. What's the definition of "qualified tuition and related expenses"? For UC, what are those fees?

### **Data Corrections**

29. The information on the notice I received is incorrect. Where did it come from? How do I get it corrected?
30. You have an old address for me. If I give you my new address, do I also have to notify the campus? (for both currently enrolled students and students who have since left the school)
31. The SSN on the 1098-T is wrong.
32. I've changed my name since the time I was enrolled in school. I want the name changed that is printed on the 1098-T to show my new name.
33. I'm being claimed as a dependent by my parents, and they want the 1098-T information reported under their SSN.
34. I am an Extension student. I have taken numerous courses. The 1098-T did not indicate that I was attending at least half time, but I was. How do I get the 1098-T corrected?
35. I'm in a special joint program that involves more than one UC campus, and I don't believe that the information includes amounts regarding the fees I paid for the other program.

### **Financial Aid**

36. Can I pay my tuition and fees out of pocket so that my gift aid won't be used as an offset to my credit?
37. What if I have a scholarship from an outside agency/foundation? How is this reported to the IRS?
38. What if my Americorp voucher is used against my fees? How is this reported?
39. Who reports the aid from consortium agreements between two schools? The Host School or the Home School?
40. Was my grant /scholarship applied against fees?
41. What constitutes "gift aid"?
42. Is the amount of money I received for work-study treated as "gift aid"?

43. I received a reimbursement from my employer for the fees that I paid. Can I still claim that amount?
44. I was a regularly enrolled student during the year and received scholarships that covered all my expenses. I also attended summer session/Extension for which I received no financial aid. Can I still claim the full amount of the fees that I paid for summer/Extension? (Same scenario but with attendance at two different schools.)
45. I received a scholarship from my mother's employer. The amount of that scholarship wasn't listed on the notice I received from the University, even though the check was sent to the financial aid office. My mother wants to know if the credit she claims has to represent the difference between the amount of qualified tuition and related expenses paid less the scholarship amount?
46. Are you sure that the loans I received are treated as "payments" of qualified tuition and related expenses? Will you put that in writing?

## **IRS**

47. Where can I get more information about these credits?
48. Why did you send this notice to me? I'm not eligible.
49. My parents claim me as a dependent on their tax return. Am I supposed to list just one or both of my parents on the W-9S form?
50. I am a dependent student. My parents were married in 1998, while I was attending UC, but now in 1999 they're divorced. Which parent do I list on the W-9S form?
51. If I took money from an IRA to pay part of my expenses, can I claim that those funds were used to cover my room and board, thus, claiming the full benefit from the credit?
52. I received a scholarship that wasn't listed on the notice I received from the University. How would the IRS know that I got it if the University didn't report it?
53. How would the IRS know what I paid in qualified tuition and related expenses and what gift aid I received if the University didn't have to report it to them?
54. For 1998, would I get caught if I just claimed the maximum credit, even though I didn't actually pay the full amount?

## **Privacy**

55. I'm Student X's parent and was told I needed to contact you (the vendor) in order to get a copy of the 1098-T. (same scenario but with Student X's spouse)
56. I'm Student X's parent and need further clarification about the amounts of qualified tuition paid/financial aid received that was reported on the 1098-T that my child received. (same scenario but with Student X's spouse)
57. What do you mean you can't release the information to me without my child's written permission?! I need the information NOW to complete my tax return; the deadline is today! I can't reach my child; he/she is attending classes. (same scenario but with the student's spouse)
58. Will you accept a faxed copy of my child's signature, authorizing you to release information to me?
59. Can I have the student, who is my child/spouse, send you an e-mail giving you permission to release the information to me?
60. To whom does my child/spouse have to give written permission in order for me to have open access to this information? If it's the school, which office?

61. Once you have my child's/spouse's written permission, can I access other information that you have about the student?
62. Does my child/spouse have to give written permission each year to the University in order for me to get the information I need for my tax return?
63. What exactly does this written permission have to say?
64. My child is unreliable about forwarding information tax documents to me. In the future, would you please send the 1098-T directly to me and not to my child.
65. Who can I contact to complain about UC's policy of not releasing information to parents who need the information to file their tax returns?
66. I don't want my information reported because I'm not eligible for either credit. How do I stop it from being reported?