UCSB Annual Income Tax Information Return Contacts

To request missing forms:

Employees Receiving Wages
- **IRS Form W-2, Wage and Tax Statement**—mailed by January 31
- Also available from the [AtYourServiceOnline](http://AtYourServiceOnline) web page.
- Payroll Office contacts—
  - geraline.savary@bfs.ucsb.edu
  - Lissett.gonzales@bfs.ucsb.edu

Independent Personal Services Providers
- **IRS Form 1099-MISC, Miscellaneous Income**—mailed by January 31
- Contact asger.pedersen@bfs.ucsb.edu

Students
- **IRS Form 1098-T, Tuition Statement**—mailed by January 31
- Details available at [http://www.1098t.com](http://www.1098t.com)
- Q and A at [http://www.bfs.ucsb.edu/faqs/1098t](http://www.bfs.ucsb.edu/faqs/1098t)
- Call 1-877-467-3821 with additional questions.

Nonresident Aliens
- **IRS Form 1042-S, Foreign Person’s U.S. Source Income Subject to Withholding**—mailed by March 15 or sooner in case of fellowship grant income:
  - Contact asger.pedersen@bfs.ucsb.edu for payments to non-employees (honoraria, independent personal services) and students (non-service fellowship grant stipends—usually mailed by mid February)
  - Contact margarita.cantu@bfs.ucsb.edu for treaty exempt wages paid to students, teachers and researchers through payroll

California Nonresidents, including Nonresident Aliens
- **California Form 592-B, Report of Tax Withheld at Source on Nonresidents**—mailed by January 31
  - Payroll transactions—contact lan.nguyen@bfs.ucsb.edu
  - Non-Payroll transactions—contact asger.pedersen@bfs.ucsb.edu

University Retirees
- **IRS Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**
  - Call (800) 888-8267, UC Retirement Administration Service Center, PO Box 24570, Oakland, CA 94623-1570.

To report incorrect information

**IRS Form W-2, Wage and Tax Statement:** Sona Baboolal, sona.baboolal@bfs.ucsb.edu

**IRS Form 1098-T, Tuition Statement:** Steve Kriz, steve.kriz@bfs.ucsb.edu

**IRS Form 1099-MISC, Miscellaneous Income,** Asger Pedersen asger.pedersen@bfs.ucsb.edu

**IRS Form 1042-S, Foreign Person’s U.S. Source Income Subject to Withholding:** Asger Pedersen asger.pedersen@bfs.ucsb.edu