

# 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](#) web page.
- Payroll Office contacts—
  - [geraldine.savary@bfs.ucsb.edu](mailto:geraldine.savary@bfs.ucsb.edu)
  - [Lissett.gonzales@bfs.ucsb.edu](mailto: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](mailto:asger.pedersen@bfs.ucsb.edu)

### Students

- **IRS Form 1098-T, Tuition Statement**—mailed by January 31
- Details available at <http://www.1098t.com>
- Q and A at <http://www.bfs.ucsb.edu/faqs/1098t>
- Call [1-877-467-3821](tel: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](mailto: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](mailto: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](mailto:lan.nguyen@bfs.ucsb.edu)
- Non-Payroll transactions—contact [asger.pedersen@bfs.ucsb.edu](mailto: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](mailto:sona.baboolal@bfs.ucsb.edu)

**IRS Form 1098-T, Tuition Statement:** Steve Kriz, [steve.kriz@bfs.ucsb.edu](mailto:steve.kriz@bfs.ucsb.edu)

**IRS Form 1099-MISC, Miscellaneous Income,** Asger Pedersen [asger.pedersen@bfs.ucsb.edu](mailto: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](mailto:asger.pedersen@bfs.ucsb.edu)