

U.S. Resident Taxes information for 2023

University of Washington

Student Fiscal Services



Agenda

- > Important Information for 2023 Returns
- > American Opportunity Tax Credit & Lifetime Learning Tax Credit
- > Qualified Tuition Programs (529 Plans)
- > Qualified Education Expenses
- > Non-Qualified Education Expenses
- > Departmental Scholarships, Fellowships and Grants for U.S. Resident students
- > Prepaying Your Taxes to the IRS
- > Form 1098T
- > Information Resources



Important Information

- > Tax due date is **04-15-2024**
- > Standard deduction is \$13,850 for single and \$27,700 for married joint return
- > Covid-19 Emergency aid or CARES Act payment is not reported in Box 5 on the 1098T form. This money is non-taxable
- > Only use 1040 tax form to file. Form 1040A or 1040EZ have been discontinued



Standard Deduction of \$13,850 for single filer

- > An amount you will subtract from your gross income before you calculate your taxes
- > Taxpayers can do itemized deductions if they have large acceptable expenses, like mortgage interest or property tax
- > The IRS gives you the standard deduction if you do not have itemized deductions or if your itemized deductions are less than \$12,550

✓ You can use the standard deduction whether you are a dependent or not!



Tax Credit

- > A tax credit reduces the amount of income tax you may have to pay
- > Please read IRS Publication 970 for more information on the two education tax credits
- > The IRS discontinued the tuition and fees deduction form 8917. So you cannot claim this deduction if you do not qualify for tax credit.



American Opportunity Tax Credit:

- > Applies to the first four years of post-secondary education, this credit is for undergraduate students
- > You can claim up to a **\$2,500 credit** if you paid the cost of qualified tuition and related expenses in the tax year 2023



Lifetime Learning Tax Credit:

- > For **any type of post-secondary education**, including classes taken to improve or acquire job skills
- > Includes students enrolled in a graduate program or fee base program
- > For an unlimited number of years
- > Credit is calculated by 20% of the first \$10,000 you paid for the qualified education expenses
- > **Maximum \$2,000 credit** in tax year 2023



You Can Claim a Tax Credit

- > If you pay qualified education expenses
- > For American Opportunity and Lifetime Learning: your MGI is under **\$90,000** for single or under **\$180,000** for married filing jointly. AOTC and LLC are both incrementally decreased for MGI between \$80,000 – \$90,000 for single filers and \$160,000 – \$180,000 for joint filers
- > To claim a credit, use **tax form 1040**
- > To calculate the tax credit, use **form 8863**



You Cannot Claim a Tax Credit

- > If your filing status is married filing separately
- > You are listed as a dependent in the exemptions section on another person's tax return
- > Your income is over **\$90,000** for single and over **\$180,000** for married filing jointly
- > You or your spouse was classified as a Non-Resident Alien for any part of 2023 and did not elect to be treated as a resident for tax purposes



Qualified Tuition Program

(GET/DreamAhead or 529 College Saving Program)

- > Many states have programs that allow people to prepay or contribute to an account to help pay for qualified education expenses
- > **No tax is due on a distribution for a Qualify Tuition Payment** unless the amount distributed is greater than the qualified education expenses
- > Washington State offers the GET program and the DreamAhead Program
- > Payments from these two programs are not reported on the 1098T tax form



Qualified Education Expenses For American Opportunity Tax Credit

Per IRS regulations, qualified education expenses are:

- > Tuition and fees required for enrollment
- > Course related books
- > Supplies
- > Equipment needed for a course of study

Qualified Educational Expenses include course materials that the student needs for a course of study whether or not the materials are bought at the educational institution as a condition of enrollment or attendance



Qualified Education Expenses for Lifetime Learning Tax Credit

Per IRS regulations, qualified education expenses are:

- > Tuition and fees required for enrollment
- > Books
- > Supplies
- > Equipment
 - > May be claimed ONLY if the expense is required for attendance and is **paid directly** to the educational institution



Qualified Education Expenses DO NOT Include

- > Insurance
- > Medical Expenses (including student health fees)
- > Transportation (U-Pass)
- > Room & Board
- > Similar personal, living or family expenses



Departmental Scholarships, Fellowships and Grants



A scholarship or fellowship is tax free when:

the money is paying for qualified education expenses

AND

the student is working towards a degree



Prizes, Awards and Stipends to U.S. Citizens & Resident Students

- > Prizes, awards and stipends are taxable income
- > When a department awards money onto the student's tuition account, UW does not withhold taxes, but will report it on the 1098T form
- > The money can affect the student's tax credit and financial aid status
 - When departments award money in the student account system, the Financial Aid Office will receive this information for use in determining the needs of students when they apply for financial aid



Paying Taxes on Stipend Payments

- > Stipend payment from your department is taxable income
- > FICA taxes are not withheld from departmental stipend payment if it is paid by the payroll office
- > For taxable income with taxes not withheld, you should prepay taxes to the IRS quarterly to reduce the tax amount due when you file your yearly tax return



How to Prepay Your Taxes



- > Visit: irs.gov/payments
- > Go to make a payment section:

Pay from Your Bank Account

For individuals only. No registration required. No fees from IRS. Schedule payments up to a year in advance.

Pay Now with Direct Pay

Pay by Debit Card, Credit Card or Digital Wallet (e.g., PayPal)

For individuals and businesses (not for payroll tax deposits). Processing fees apply.

Pay Now by Card or Digital Wallet

Other Ways You Can Pay

- [Same-Day Wire](#) — Bank fees may apply
- [Check or Money Order](#) — Through U.S. mail
- [Cash](#) — Through a retail partner and other methods
- [Electronic Funds Withdrawal](#) — During e-filing

- > Pay using your SS# with the amount
- > You need to select the year and prepay taxes
- > Print a payment receipt after you pay



1098T Form (prepared by UW)

- > UW generates a 1098T form for all UW and CC/PCE students. On-line printing available from our website:

<http://finance.uw.edu/sfs/tax>

- > Summarizes all tuition and fee charges and payments in Box 1
- > Summarizes scholarships, fellowships and financial aid in Box 5
- > Helps students to determine if they qualify for a tax credit or if the scholarship and grant aid money is taxable
- > Non-Resident Alien students do not receive the 1098T form, but there are some exceptions



1098T Form (prepared by UW)

UW reports tuition payments plus scholarships and financial aid grants on the 1098T form

Information on the form:

- > Box 1 – total of qualified tuition and fees payments
- > Box 5 – total of scholarships or financial aid grants

When comparing box 1 to box 5:

- > If box 1 total is greater than box 5 total, student may qualify for a tax credit
- > If box 5 total is greater than the box 1 total, student will have to report the difference in the amount as income



1098T Form – Tax Credits



UNIVERSITY OF WASHINGTON
Educational Tax Credits Report
IRS Form 1098-T and UW Information Statement – Tax Year 2023

1/22/24

If you have any questions regarding this report, please contact Student Fiscal Services via email at taxquest@uw.edu or call 206-221-2608, 9-5 Pacific Time Monday through Friday. See reverse page for additional information.

University of Washington
Student Fiscal Services
129 Schmitz Hall, Seattle WA 98195

UW IRS Identification Number: 91-6001537

SOC SEC NUMBER:
Student Number:

INFORMATION SUBMITTED TO THE IRS

The following information is being sent to the IRS. Box numbers correspond to IRS form 1098-T, also called the "Tuition Statement". Any box number not listed should be considered to have a zero dollar amount.

Box 1 : Payments for qualified tuition & related expenses... \$12,106.00
Box 5 : Scholarships or grants..... \$0.00
Box 7 : Expenses include an amount for 2024..... No
Box 8 : Student is at least half-time..... Yes
Box 9 : Student is a graduate student..... No

DETAIL OF CHARGES AND FINANCIAL ASSISTANCE RECEIVED

The following itemized information is NOT being sent to the IRS.

QUALIFIED TUITION and RELATED EXPENSES PAID IN 2023

Charged	Transaction	Expense	Paid
12/28/22	WINTER 2023 TUITION	3,989.00	3,989.00
3/22/23	SPRING 2023 TUITION	3,988.00	3,988.00
8/31/23	AUTUMN 2023 TUITION	4,129.00	4,129.00
TOTAL:		12,106.00	12,106.00

Box 1 \$12,106.00

Box 5 - \$0.00

Difference: **\$12,106.00**

you can only claim one of the credits:

American Opportunity is **\$2,500**

Lifetime Learning is **\$2,000**



1098T Form – Scholarship Income



UNIVERSITY OF WASHINGTON
 Educational Tax Credits Report
 IRS Form 1098-T and UW Information Statement – Tax Year 2023

1/12/24

If you have any questions regarding this report, please contact Student Fiscal Services via email at taxquest@uw.edu or call 206-221-2609, 9-5 Pacific Time Monday through Friday. See reverse page for additional information.

University of Washington
 Student Fiscal Services
 129 Schmitz Hall, Seattle WA 98195

UW IRS Identification Number: 91-6001537

INFORMATION SUBMITTED TO THE IRS

The following information is being sent to the IRS. Box numbers correspond to IRS Form 1098-T, also called the "Tuition Statement". Any box number not listed should be considered to have a zero dollar amount.

Box 1 : Payments for qualified tuition & related expenses... \$10,227.00
 Box 5 : Scholarships or grants... -\$20,202.00
 Box 7 : Expenses include an amount for 2024... No
 Box 8 : Student is at least half-time... Yes
 Box 9 : Student is a graduate student... No

DETAIL OF CHARGES AND FINANCIAL ASSISTANCE RECEIVED

The following itemized information is NOT being sent to the IRS:

QUALIFIED TUITION and RELATED EXPENSES PAID IN 2023

Charged	Transaction	Expense	Paid
12/28/22	WINTER 2023 TUITION	3,989.00	3,989.00
	REGULAR COURSE FEES	75.00	75.00
3/22/23	SPRING 2023 TUITION	1,993.00	1,993.00
	REGULAR COURSE FEES	80.00	80.00
6/14/23	SUMMER 2023 TUITION	1,195.00	1,195.00
8/31/23	AUTUMN 2023 TUITION	2,890.00	2,890.00
	REGULAR COURSE FEES	5.00	5.00
TOTAL:		10,227.00	10,227.00

SCHOLARSHIPS OR GRANTS RECEIVED IN 2023

Date	Transaction	Grant Aid	Total
12/28/22	UNDERGRAD TUITION EXEMPTION	2,658.00	
	WASHINGTON COLLEGE GRANT	1,498.00	
	WASHINGTON COLLEGE GRANT	1,427.00	
	WASHINGTON BRIDGE GRANT	187.00	
	FEDERAL SUPPLEMENTAL GRANT	100.00	
	FEDERAL PELL GRANT	1,724.00	
3/30/23	UNDERGRAD TUITION EXEMPTION	830.00	
	WASHINGTON COLLEGE GRANT	760.00	
	FEDERAL PELL GRANT	575.00	
	WASHINGTON COLLEGE GRANT	215.00	
	WASHINGTON BRIDGE GRANT	166.00	
6/22/23	WASHINGTON COLLEGE GRANT	997.00	
	WASHINGTON BRIDGE GRANT	109.00	
	FEDERAL PELL GRANT	181.00	
	FEDERAL PELL GRANT	435.00	
9/20/23	UNDERGRAD TUITION EXEMPTION	2,890.00	
	UNDERGRAD UNIVERSITY GRANT	91.00	
	UNDERGRAD UNIVERSITY GRANT	619.00	
	WASHINGTON COLLEGE GRANT	1,993.00	
	WASHINGTON BRIDGE GRANT	125.00	
	FEDERAL SUPPLEMENTAL GRANT	75.00	
	FEDERAL PELL GRANT	1,233.00	
9/28/23	UNIVERSITY SCHOLARSHIP SEATTLE	1,334.00	20,202.00

Box 1: \$10,227.00
Box 5: -\$20,202.00
Difference: **\$-9,975.00**

Extra scholarship funds to report as
 income: **\$9,975.00**



1098T Form – Stipend



UNIVERSITY OF WASHINGTON
Educational Tax Credits Report
 IRS Form 1098-T and UW Information Statement – Tax Year 2023

1/12/24

If you have any questions regarding this report, please contact Student Fiscal Services via email at taxquest@uw.edu or call 206-221-2609, 9-5 Pacific Time Monday through Friday. See reverse page for additional information.

University of Washington
 Student Fiscal Services
 129 Schmitz Hall, Seattle WA 98195

UW IRS Identification Number: 91-6001537

Box 1: \$14,080.00
Box 5: - \$42,433.03
Difference: - **\$28,353.03**

Additional scholarship payments should be reported as additional income:
 \$28,353.03

Stipend Paid via Payroll:

No taxes are withheld by the payroll office – stipends are reported on the 1098T form as a scholarship. This may increase tax liability

INFORMATION SUBMITTED TO THE IRS

The following information is being sent to the IRS. Box numbers correspond to IRS form 1098-T, also called the "Tuition Statement". Any box number not listed should be considered to have a zero dollar amount.

Box 1 : Payments for qualified tuition & related expenses... \$14,080.00
 Box 5 : Scholarships or grants..... \$42,433.03
 Box 7 : Expenses include an amount for 2024..... No
 Box 8 : Student is at least half-time..... Yes
 Box 9 : Student is a graduate student..... Yes

DETAIL OF CHARGES AND FINANCIAL ASSISTANCE RECEIVED

The following itemized information is NOT being sent to the IRS.

QUALIFIED TUITION and RELATED EXPENSES PAID IN 2023

Charged	Transaction	Expense	Paid
3/23/23	SPRING 2023 TUITION	6,071.00	6,071.00
6/22/23	SUMMER 2023 TUITION	1,736.00	1,736.00
9/08/23	AUTUMN 2023 TUITION	6,273.00	6,273.00
TOTAL:		14,080.00	14,080.00

SCHOLARSHIPS OR GRANTS RECEIVED IN 2023

Date	Transaction	Grant Aid	Total
4/05/23	1% MERIT-GRADUATE/F EXEMPT	6,071.00	
	NSF GRFP FELLOWS 22-23	92.00	
5/04/23	EARTH/SPACE SCI RCR	1,000.00	
6/22/23	1% MERIT-GRADUATE/F EXEMPT	1,736.00	
6/30/23	NSF GRFP FELLOWS 22-23	92.00	
10/02/23	UW FUNDS TECH FEE	22.00	
10/04/23	NSF GRFP FELLOWS 22-23	6,337.00	
12/31/23	SUM OF AMTS PAID THRU WORKDAY	27,083.03	42,433.03

← stipend payment



IRS Form 1040 Schedule 1

SCHEDULE 1
(Form 1040)

Additional Income and Adjustments to Income

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

2023
Attachment
Sequence No. **01**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR

Your social security number

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions): _____		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income:		
a	Net operating loss	8a	()
b	Gambling	8b	
c	Cancellation of debt	8c	
d	Foreign earned income exclusion from Form 2555	8d	()
e	Income from Form 8853	8e	
f	Income from Form 8889	8f	
g	Alaska Permanent Fund dividends	8g	
h	Jury duty pay	8h	
i	Prizes and awards	8i	
j	Activity not engaged in for profit income	8j	
k	Stock options	8k	
l	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8l	
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m	
n	Section 951(a) inclusion (see instructions)	8n	
o	Section 951A(a) inclusion (see instructions)	8o	
p	Section 461(l) excess business loss adjustment	8p	
q	Taxable distributions from an ABL account (see instructions)	8q	
r	Scholarship and fellowship grants not reported on Form W-2	8r	
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	()
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t	
u	Wages earned while incarcerated	8u	
z	Other income. List type and amount: _____	8z	
9	Total other income. Add lines 8a through 8z	9	
10	Combine lines 1 through 7 and 9. This is your additional income . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	

To report excess scholarship as income use:

LINE 8r of Schedule 1:
amount & "SCH"



IRS Form 8863 – Calculate Tax Credit

Form **8863** **Education Credits**
(American Opportunity and Lifetime Learning Credits)
Department of the Treasury
Internal Revenue Service
Name(s) shown on return

OMB No. 1545-0074
2023
Attachment
Sequence No. **50**

Attach to Form 1040 or 1040-SR.
Go to www.irs.gov/Form8863 for instructions and the latest information.

Your social security number

CAUTION Complete a separate Part III on page 2 for each student for whom you're claiming either credit before you complete Parts I and II.

Part I Refundable American Opportunity Credit

1 After completing Part III for each student, enter the total of all amounts from all Parts III, line 30 **1**

2 Enter: \$180,000 if married filing jointly; \$90,000 if single, head of household, or qualifying surviving spouse **2**

3 Enter the amount from Form 1040 or 1040-SR, line 11. But if you're filing Form 2555 or 4563, or you're excluding income from Puerto Rico, see Pub. 970 for the amount to enter instead **3**

4 Subtract line 3 from line 2. If zero or less, stop; you can't take any education credit **4**

5 Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying surviving spouse **5**

6 If line 4 is:
• Equal to or more than line 5, enter 1.000 on line 6 **6**
• Less than line 5, divide line 4 by line 5. Enter the result as a decimal (rounded to at least three places)

7 Multiply line 1 by line 6. **Caution:** If you were under age 24 at the end of the year and meet the conditions described in the instructions, you can't take the refundable American opportunity credit; skip line 8, enter the amount from line 7 on line 9, and check this box **7**

8 **Refundable American opportunity credit.** Multiply line 7 by 40% (0.40). Enter the amount here and on Form 1040 or 1040-SR, line 29. Then go to line 9 below. **8**

Part II Nonrefundable Education Credits

9 Subtract line 8 from line 7. Enter here and on line 2 of the Credit Limit Worksheet (see instructions) **9**

10 After completing Part III for each student, enter the total of all amounts from all Parts III, line 31. If zero, skip lines 11 through 17, enter -0- on line 18, and go to line 19 **10**

11 Enter the smaller of line 10 or \$10,000 **11**

12 Multiply line 11 by 20% (0.20) **12**

13 Enter: \$180,000 if married filing jointly; \$90,000 if single, head of household, or qualifying surviving spouse **13**

14 Enter the amount from Form 1040 or 1040-SR, line 11. But if you're filing Form 2555 or 4563, or you're excluding income from Puerto Rico, see Pub. 970 for the amount to enter instead **14**

15 Subtract line 14 from line 13. If zero or less, skip lines 16 and 17, enter -0- on line 18, and go to line 19 **15**

16 Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying surviving spouse **16**

17 If line 15 is:
• Equal to or more than line 16, enter 1.000 on line 17 and go to line 18 **17**
• Less than line 16, divide line 15 by line 16. Enter the result as a decimal (rounded to at least three places)

18 Multiply line 12 by line 17. Enter here and on line 1 of the Credit Limit Worksheet (see instructions) **18**

19 **Nonrefundable education credits.** Enter the amount from line 7 of the Credit Limit Worksheet (see instructions) here and on Schedule 3 (Form 1040), line 3 **19**

CAUTION Complete Part III for each student for whom you're claiming either the American opportunity credit or lifetime learning credit. Use additional copies of page 2 as needed for each student.

Part III Student and Educational Institution Information. See instructions.

20 Student name (as shown on page 1 of your tax return) **21** Student social security number (as shown on page 1 of your tax return)

22 Educational institution information (see instructions)
a. Name of first educational institution b. Name of second educational institution (if any)

(1) Address. Number and street (or P.O. box), city, town or post office, state, and ZIP code. If a foreign address, see instructions. (1) Address. Number and street (or P.O. box), city, town or post office, state, and ZIP code. If a foreign address, see instructions.

(2) Did the student receive Form 1098-T from this institution for 2023? Yes No (2) Did the student receive Form 1098-T from this institution for 2023? Yes No

(3) Did the student receive Form 1098-T from this institution for 2022 with box 7 checked? Yes No (3) Did the student receive Form 1098-T from this institution for 2022 with box 7 checked? Yes No

(4) Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in (2) or (3). You can get the EIN from Form 1098-T or from the institution. (4) Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in (2) or (3). You can get the EIN from Form 1098-T or from the institution.

23 Has the American opportunity credit been claimed for this student for any 4 prior tax years? Yes — Stop! Go to line 31 for this student. No — Go to line 24.

24 Was the student enrolled at least half-time for at least one academic period that began or is treated as having begun in 2023 at an eligible educational institution in a program leading towards a postsecondary degree, certificate, or other recognized postsecondary educational credential? See instructions. Yes — Go to line 25. No — Stop! Go to line 31 for this student.

25 Did the student complete the first 4 years of postsecondary education before 2023? See instructions. Yes — Stop! Go to line 31 for this student. No — Go to line 26.

26 Was the student convicted, before the end of 2023, of a felony for possession or distribution of a controlled substance? Yes — Stop! Go to line 31 for this student. No — Complete lines 27 through 30 for this student.

CAUTION You can't take the American opportunity credit and the lifetime learning credit for the same student in the same year. If you complete lines 27 through 30 for this student, don't complete line 31.

American Opportunity Credit

27 Adjusted qualified education expenses (see instructions). Don't enter more than \$4,000 **27**

28 Subtract \$2,000 from line 27. If zero or less, enter -0- **28**

29 Multiply line 28 by 25% (0.25) **29**

30 If line 28 is zero, enter the amount from line 27. Otherwise, add \$2,000 to the amount on line 29 and enter the result. Skip line 31. Include the total of all amounts from all Parts III, line 30, on Part I, line 1 **30**

Lifetime Learning Credit

31 Adjusted qualified education expenses (see instructions). Include the total of all amounts from all Parts III, line 31, on Part II, line 10 **31**



Electronic Filing

An official website of the United States Government

IRS

Help | News | English | Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions

Search

Home / File / Individuals / How to File / Free File: Do your taxes for free

IRS Free File: Do your taxes for free

English | Español | 中文(简体) | 中文(繁體) | 한국어 | Русский | Tiếng Việt | Kreyòl ayisyen

Individuals

- Who Should File
- How to File
- Free File**
- e-File Options
- When to File
- Where to File
- Amend Return
- Your Information
- Life Events
- Students
- Employees
- Parents
- Military
- Seniors & Retirees

Businesses and Self-Employed

Charities and Nonprofits

International Taxpayers

Governmental Liaisons

Federal State Local Governments

IRS Free File lets qualified taxpayers prepare and file federal income tax returns online using guided tax preparation software. It's safe, easy and no cost to you. Those who don't qualify can still use Free File Fillable Forms.

Individual tax filers, regardless of income, can use IRS Free File to electronically request an automatic tax-filing extension.

Choose from IRS Free File:

Option 1: Guided Tax Software
(for **Adjusted Gross Income (AGI)** \$79,000 or less)

Let the software do the work

- Answer simple questions
- Choose between trusted IRS partners you qualify for
- Accurate math calculations guaranteed
- Free state tax preparation and filing with some trusted partners
- Prepare and file your federal return in [Spanish](#)

[Explore Free Guided Tax Software](#)

Option 2: Fillable Forms

You do all the work using form instructions

- Available for any income level
- No guidance and limited calculations provided
- No state tax preparation and filing

[Use Fillable Forms](#)

What is IRS Free File?

The IRS Free File Program is a public-private partnership between the IRS and many tax preparation and filing software industry companies who provide their online tax preparation and filing for free. It provides two ways for taxpayers to prepare and file their federal income tax online for free:

Here's What to ...

What to know about IRS Free File guided tax software

Here's How to ...

How to use the Find Your Trusted Partner Tool

How to Create ...

How to create an account to use IRS Free File Fillable Forms

[Transcript](#)

Link:

<https://www.irs.gov/filing/free-file-do-your-federal-taxes-for-free>



IRS Resources

Great source for:

- Information about tax return preparation
- Tax forms and instructions
- IRS Publications

Help by phone:

- Hotline available to answer questions
- Helps with tax return preparation
- Most documents are easy to print



www.irs.gov

IRS Publication 970



Individual Tax Help

1-800-829-1040



IRS Seattle Office

915 Second Ave (Downtown Seattle)
32nd Floor, Federal Building

Hours:

Monday - Friday

8:30 am to 4:30 pm by appointment



At Your Service

Taxpayer Advocate Service

www.irs.gov/advocate

(206) 946-3707

- > Serves taxpayers in Washington State
- > Helps if you have tried unsuccessfully to resolve a problem with the IRS
- > Offers special help to taxpayers experiencing a significant hardship due to their tax problems



Other Tax Help

United Tax Way Free Online Tax Help

January 16th – April 21st, 2024

- > 17 locations across King County + virtual tax site
- > No appointment needed

Follow the link below:

[FreeTaxExperts.org](https://www.freetaxexperts.org)



UW Free Tax Assistance

HOURS

UW VITA reopens on January 24th, 2024. The site will run from 11:30 am to 2:30 pm on Tuesdays and Thursdays.

LOCATION

University of Washington, Seattle Campus
Dempsey Hall Room 202
4277 NE Stevens Way, Seattle, WA 98195

WHO QUALIFIES

Households making less than \$80,000 can access free tax help and preparation for this tax year

The UW site also helps prepare nonresident returns



For More Tax Information

IRS Web Site
www.irs.gov

IRS Publication 970
IRS Instructions for 1040



Opting Out of the Paper 1098-T

For a no-hassle, paperless, environmentally friendly 1098T, sign up to **“Opt Out”** of receiving the paper 1098T form

Student Fiscal Services will send you an email as soon as the 1098T is on your MyUW page!

UNIVERSITY of WASHINGTON

HOME / TUITION & FEES / SCHOLARSHIPS & TAXES / LOANS & RECEIVABLES / UW DEPTS / RESOURCES / ABOUT SFS

Student Fiscal Services

TUITION PAYMENT
LEARN MORE

TUITION OVERVIEW
LEARN MORE

TAXES
LEARN MORE

SCHOLARSHIPS & FELLOWSHIPS
LEARN MORE

LOGINS

TUITION STATEMENT

1098-T TAX FORM

STUDENT LOGIN

PARENT LOGIN

NEWS & NOTICES

Phishing Scam Alert - 01/31/20:

We are aware of a phishing scam that may have affected UW students and staff. The phishing email mentions confirmation of a Webcheck payment and/or a direct deposit transfer. If you receive an email confirming a Webcheck payment when you have not initiated a payment or receive an email regarding a direct deposit you had not anticipated please do not click on or provide any personal information on the webpages linked in the email. We are investigating the matter and its possible causes. Thank you for your cooperation.

CHANGE ADDRESS

INFO RELEASE

FORMS FOR STUDENTS

FAQ

DIRECT DEPOSIT

For more information go to:
<http://finance.uw.edu/sfs/tax>



To contact student fiscal service by phone or email, you need to provide your **student ID number**



Student account questions?

Send email to: taxquest@uw.edu



Student Fiscal Services Tax line

206-221-2609



UW student tax website:

f2.washington.edu/fm/sfs/tax



Contacts

1098T Forms

Student Fiscal Services

taxquest@uw.edu

206-221-2609

W-2 forms

Payroll Tax - ISC

pr-tax@uw.edu

206-616-4317

