Directions for Students to Retrieve 1098-Ts Electronically

Your institution has contracted with Maximus Federal, Inc., to process your 1098-T. As part of this service, you have access to your 1098-T electronically through the TRA website. If you access your 1098-T before the date set by your institution to print 1098-Ts you can select to retrieve your form electronically in lieu of a mailed paper copy. Don't worry, you can always return to get additional copies if you need them.

Accessing your 1098-T is easy- Simply go to **https://tra.maximus.com**, click on "First Time Student" and follow the instructions.

If you need help, below are detailed instructions to walk you through the steps:

1. Open a web browser (such as Internet Explorer, Safari, Chrome, Firefox, etc). You should see the following:

2. **Returning Users** - If you have previously registered on this site, enter your User ID and Password or use the "Forgot your Password" or "Forgot your User ID" links to retrieve and reset your login credentials.

   New Users – Click the "First Time Students" button.
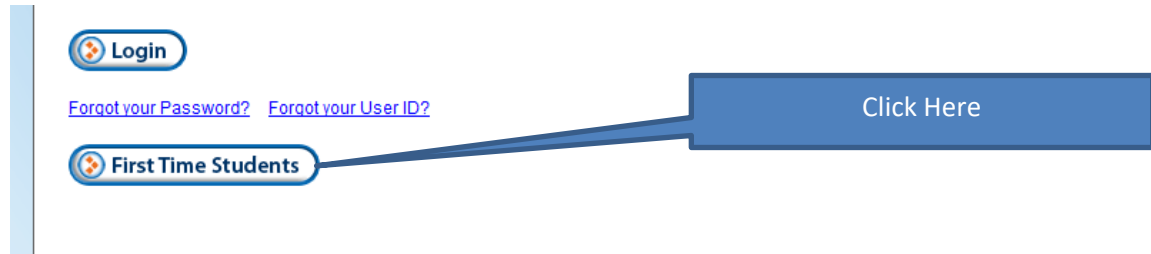
3. Enter the last 5 digits of your SSN (or your full student ID if your school reports to Maximus for processing) AND First and Last name (as it appears in your student records.)

   -Didn't find any results?

      -Did you have any net out of pocket tuition expense during the tax year? If not, your institution may not issue you a 1098-T. If you had tuition that was entirely covered by Grants or Scholarships, you may not be getting a 1098-T.

      -Is your name the same as it is on your school records?

      -Is your SSN reported to your school – We can't use it to find your record if the school doesn't have it.)

      -If you are trying Student ID, it is possible your school does not report Student IDs for processing 1098-Ts, you can either try your SSN or wait for a paper copy in the mail.

If records were found for you, you'll get the following message and boxes – Fill in the boxes to create your user account. (Note: Only one account per email address is allowed.)

✓ 1098-T forms have been found for you. In order to review your forms you must complete your registration and login. Fill out additional information below.

By accessing this site and creating an account, I am representing that I am authorized to access this information and any misuse of the information herein will be prosecuted under applicable privacy laws. I understand that I am not to share my login credentials with anyone and doing so may put my personal information at risk.

E-mail Address: samplestudent1098t@gmail.com

Verify E-mail Address: samplestudent1098t@gmail.com

Create User ID: studentsam01   Your User ID is not case sensitive and must be at least 3 characters and no more than 25. For security

reasons, please choose a User ID that is secure and easy for you to remember.

⊗ **Complete Registration**

Then Click Here

4. You should receive the following success message – if not follow the instructions to correct what went wrong.

SERVICE

Success

You have successfully created your account. You will be receiving an e-mail shortly with your temporary password and instructions on how to activate your account.

Please remember to keep track of your user id and do not share it with others.

Your User ID is **studentsam01**

Close this browser window and go to your e-mail. Use the link and default password in the e-mail, from TRA Customer Service, to complete activation of your account. If you have not received an e-mail within 15 minutes, check your spam or junk mail folders for this e-mail.

5. Go to your email and retrieve your default password. The email comes from "TRA Customer Service" If you don't get the email, look in your "SPAM" of Junk Mail folder.

TRA Customer Service <TRA_Customer_Service   10:38 AM (2 minutes ago) ☆ ↩ ▼
to me ▾

Dear Sample,

Thank you for creating an account in the TRA system. Your temporary password is $#7m_d11

Please click the link below to log in and complete your account creation. You may either select the link or copy the entire link and paste it into the address or location line of your Web browser. Make sure you copy and paste the entire link.

6. Click on the link provided in the email (If clicking doesn't work, copy and paste it into your browser) and fill in the username you created and copy and paste or type the temporary password in the password box.

Account Setup Completion - Identification

Please fill in your User ID and temporary password. Your password was sent to the e-mail account you used during registration.

You will have the opportunity to set your own password later in this process.

Note:

> Internet Explorer 9 Users - Use "Compatability View" to view this page properly. "Compatability View" can be found in your "Tools" menu.

User ID: studentsam01

Password: ••••••••

(⊗) Next

7. Select one of the security questions to answer and type an answer only you'll know and that you'll remember. This answer is "Case sensitive" so take note of any capital letters you use. Remember it doesn't have to be the right answer, just one you'll know what response to give.

Account Setup - Challenge Question

Challenge Question   What is the name of your favorite pet?   ▼

Challenge Question Answer   phydeaux

(⊗) Back   (⊗) Submit

> Click "Submit" to save your response and continue

8. Enter a new Password for yourself. You can use as "Strong" or "weak" of a password as you want, but remember, this is protecting access to your data. Passwords are case sensitive as well. Hint: You can change your password by using the "Forgot my Password" link on the main login page.

Account Setup - Password

Understand that, while this site does not require "strong passwords" it is in your best passwords are not based in words, but contain a mixture of upper and lowercase lette numbers.

New Password   ••••••••

Confirm Password   ••••••••

(⊗) Back   (⊗) Next

> Click Next

9. When you have saved your new password, you should be automatically logged in. You will see all the 1098-T records Maximus has for you.

Student Options

Welcome Sample Student!

The following is a listing of the 1098-T's that are associated with your Social Security Number. Please note, this list is only from schools who currently are, or were previously using Vangent's services. The available 1098-T records displayed are from 2005 - present. If you need a 1098-T from a year prior to 2005, please contact TRA Customer Service at 800-223-0043.

Records Found:1

Name ⬦	SSN ⬦	Tax Year ▾	Campus Name ⬦	Action	
Sample Student	778889...	2012	Mars Academy One	Change 1098-T dat Get 1098-T by Mail View/Print 1098-T	

> Click here to see and print your 1098 T

10. If you access the record before your institution has directed it to be printed, you will receive the following message:

> By checking the 'Acknowledge' check box, I indicate that I understand that I am retrieving my 1098-T electronically and that a paper 1098-T will not be printed and mailed to me pursuant to IRS rules that allow for a taxpayer to elect in the affirmative to receive a form electronically. I understand that I can return to this site to retrieve additional copies of my 1098-T in the future.
>
> Acknowledge ☐
>
> ⊙ Save   ⊙ Cancel

11. Check the Acknowledge box and Click save – You have confirmed that you inderstand a paper 1098-T will not be mailed to you. If you do not complete this step, you will have to wait until your institutions' forms have printed to have access electronically without consenting to waiving printing.

12. Your 1098-T should now display for you as a pdf. If it does not, click on the view/print 1098-T pdf link again.

FILER'S name, street address, city, state, and ZIP code Mars Academy 545 Million Miles Away Road Des Moines CA 97777 TRA Customer Service 800 - 223 - 0043	1 Payments received for qualified tuition and related expenses $1000.00	OMB No. 1545-1574 **2012** **Form 1098-T**	**Tuition Statement**
	2 Amounts billed for qualified tuition and related expenses		CORRECTED ☐ (if checked)
FILER'S Federal identification no. 88-9774777 FILER'S 1098-T contact name Davey and phone 944-555-1717	3 Reporting method changed for 2012 (if checked) ☐	Student's Social Security Number 778-88-9999	**Copy B** For Student
	4 Adjustments made for a prior year	5 Scholarships or grants $500.00	This is important tax information and is being furnished to the Internal Revenue Service.
Sample Student 123 E Sample St Sample City AA 99999	6 Adjustments to scholarships or grants for a prior year	7 The amount in box 1 or 2 includes amounts for an academic period begininning January - March 2013 (if checked) [X]	
	8 At least half-time student (if checked) [X]	9 Graduate student (if checked) ☐	10 Ins. Contract reimb./refund
Form 1098-T	(keep for your records)		Department of the Treasury - Internal Revenue Service

YOU MAY BE ABLE TO REDUCE YOUR FEDERAL TAX LIABILITY!

13. You can print or save the document from the pdf window now. Remember, you can always return to this site for additional copies of your 1098-T.

Did something not work right? - Click on "Student Help" In the left-hand "Info" menu, for useful help on commonly encountered issues and access to further assistance.

Info

Links

Student Help

Student Option

Welcome Sample Student!

The following is a listing of the
were previously using Vanger
please contact TRA Custome

Records Found:1

Click Here to access help resources.