

Student Electronic 1098-T Access Process

Institutions that contract with Maximus Federal to process their 1098-T forms have the option to allow students to electronically access their 1098-T forms through the TRA website. If students access their 1098-T before the date set by the institution to print their 1098-T (“Print After” date), this confirms receipt of the form and a paper copy is not mailed. Students are able to electronically access and print their current and prior years’ 1098-T forms saved on the TRA production database at any time, as many times as they require.

Accessing the TRA Program

Students access their 1098-Ts through the TRA website at: <https://tra.maximus.com>

Below are detailed are the steps students follow to access their form:

1. Open a web browser (Microsoft Edge, Chrome, Firefox, etc.) and enter <https://tra.maximus.com> in the address box. This URL will take them to the following landing page where they select “Login / Register” to access the program Login page.

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TRA Services

Info

- Links
- Student Help

Login

- Login / Register


Our mission is to make the 1098-T form easier for schools and students

STUDENTS: Please call **833-604-9184** for assistance obtaining your 1098-T form after clicking on Login/Register and experiencing trouble.

Monday through Friday 9:00am to 5:30pm CST, excluding Federal Holidays

SCHOOLS: MAXIMUS is pleased to provide answers to your questions and supply additional materials about our TRA Services.

Please email TRACustomerSupport@maximus.com for information regarding our TRA program.



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Login

Login / Register

Login

User ID

Password

Login Returning TRA.Maximus.com users

[Forgot your Password?](#) [Forgot your User ID?](#)

Register First-time TRA.Maximus.com users

Please call/email the following for TRA program support:

833-604-9184 - Student User Support

Monday through Friday 9:00am to 5:30pm CST, excluding Federal Holidays

hopescholar@maximus.com - Student User Email Support

TRACustomerSupport@maximus.com – School Staff Support ONLY

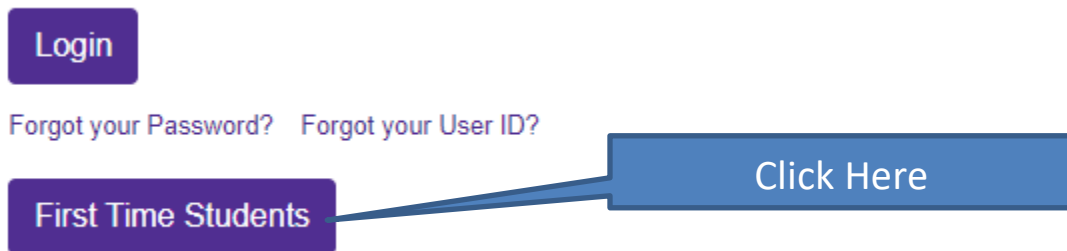
The Login page offers phone numbers for immediate assistance and an email address if the student prefers that method of communication. Our Customer Service Representatives monitor the email address and communicate back to the student in the method the communication is received unless another method is requested.

Returning Users

If the student has previously registered on this website, they should enter their User ID and Password or use the “Forgot your Password?” or “Forgot your User ID?” links to retrieve and reset their login credentials.

New Users

2. Students need to click on the “First Time Students” button.



3. New Users need to enter the last 5 digits of their SSN (or full student ID if the school concerned submits Student IDs in their TRA data) AND First and Last name (as it would appear on their 1098-T form).

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Registration

You must enter either the last 5 digits of your Social Security Number or your full Student ID, AND your full first and last name in order to be authenticated in this system. Note, the Student ID method will only work if your school has reported your Student ID to us. Many do not. Further, you must enter your name as it was provided to us by your school. If you've had a name change, you should use the name that was in use at the end of the tax year.

SSN or Student ID

Last 5 digits of your SSN

or

Student ID

AND

First and Last Name

First Name*

Last Name*

Next

4. If a student doesn't find any results:
 - a. They may not have had any net out-of-pocket tuition expense during the tax year or their tuition was entirely covered by grants or scholarships. For either of these circumstances, the institution may not issue them a 1098-T.
 - b. They did not enter their name as it was reported on their 1098-T form.
 - c. Either the SSN or Student ID that the student is using to locate their form is not included or is incorrect in their school's student record.
 - i. The student may not have given the school their SSN.
 - ii. The school may not report Student IDs in the student record.

5. If a 1098-T record is found for the student, they will see the following message to complete the required data (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.

Email

ConfirmEmail

UserId

Complete

Enter your email twice

You Create User ID

6. Students then receive the following success message:
- If the Success message is not received, students should follow the instructions that appear to correct any issues.

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Registration Successful

You have successfully created your account. You will be receiving an e-mail shortly to activate your account.

Please remember to keep track of your User ID. Do not share it with others.

Your User ID is [redacted]

Your User ID

Close this browser window and go to your e-mail. Use the link and default password to complete activation of your account. If you have not received an e-mail within [redacted] for this e-mail.

If unable to locate the e-mail, check your Spam and Junk folders.

7. Students should go to their email and follow the instructions inside the email. The email comes from "TRA Customer Service". They should look in their Spam or Junk Mail folder if it is not received.

[EXTERNAL] New TRA Account



TRA Customer Service <hopescholar@maximus.com>

To [redacted]

Dear [redacted],

This notice is to inform you that you now have an account in the TRA program.

Please click on the link below or copy and paste the entire link into your Web browser to complete your account creation.

<http://10.124.5.9/traPortal/AccountResetPassword> [redacted]

Please note that you will be required to set a personal password and challenge question after completing the initial log in. The challenge question will be used if you ever need to retrieve your password.

Once your account has been created you should bookmark <https://tra.maximus.com> for future visits to the TRA website. Please do not use the account creation link above for return visits as it may result in program access confusion.

Thank you,
TRA Customer Service

8. Students should select one of the security questions to answer and type an answer only they know and that they will remember. This answer is case sensitive and must match exactly when used in the future, similar to a password.

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Account Setup - Challenge Question

Challenge Question **Choose One**

Challenge Question Answer

Case Sensitive

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9. Students will set their personal Password. Passwords must contain at least one uppercase letter, lowercase letter, a special character and a number. Passwords are case sensitive as well. Passwords can be changed by using the “Forgot my Password” link on the main login page.
- a. Students are automatically logged in after completing this step and selecting Next:

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Account Setup - Password

Password must meet the following requirements:

- Be between 8-16 characters
- At least one upper case character(A-Z)
- At least one lower case character(a-z)
- At least one number(0-9)
- At least one of these special characters(@,.\$,#,!)

New Password

Confirm Password

Back Next

10. Returning student users and new student users will see the following screen when logged in. All 1098-T records on file with Maximus matching the SSN or Student ID provided upon registration will be visible here.

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Student Options

Welcome Test Student 1!

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 MAXIMUS's services. The available 1098 - T records displayed are from 2005 - present.

Show 10 entries Search:

Name	SSN	Student Id	OPEID	Tax Year	Campus Name	Action
Test Student 1	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	View/Print 1098-T Change 1098-T data Get 1098-T by Mail

Click here to view your 1098-T



11. If a student accesses their current year record prior to their institution's set "Print After" date, they 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

12. If they agree, the student should check the Acknowledge box and click Save. They have confirmed that they understand a paper 1098-T will not be mailed to them. If they do not complete this step, they have to wait until their institutions' forms have printed to have electronic access without consenting to waiving printing.
13. If they agree to the Acknowledgement, their 1098-T should now display as a pdf.

StudentPrint

1 / 1 | 100% |  

Tuition Statement

OMB No. 1545-1574

20

Form 1098-T CORRECTED (if checked)

FILED'S name, street address, city, state, and ZIP code
[REDACTED]

FILED'S Federal identification no.
FILED'S 1098-T contact name and phone
[REDACTED]

1 Payments received for qualified tuition and related expenses

2 Amounts billed for qualified tuition and related expenses

3 Reporting method changed for 2010 (if checked)

4 Adjustments made for a prior year
[REDACTED]

5 Scholarships or grants

6 Adjustments to scholarships or grants for a prior year

7 The amount in box 1 or 2 includes amounts for an academic period beginning January - March 2011 (if checked)

8 At least half-time student (if checked)

9 Graduate student (if checked)

10 Ins. Contract reimb./refund

Student's Social Security Number
XXX-XX-XXXX

Copy B For Student

This is important tax information and is being furnished to the Internal Revenue Service.

YOU MAY BE ABLE TO REDUCE YOUR FEDERAL TAX LIABILITY!

An eligible educational institution, such as your college or university, that received qualified tuition and related expenses on your behalf, must furnish this statement to you. You, or the person who may claim you as a dependent, may be able to take either the tuition and fee deduction or claim an

14. Students can then print or save the document from the pdf window. Students can always access additional copies of their 1098-T by following this same process.

15. On all TRA program pages, students have the “Student Help” option in the left-hand “Info” menu to access information on commonly-encountered issues and access to further assistance:

