

1099 Frequently Asked Questions

- 1) Which tax forms are handled by the Accounting and Budget department and what do they include?
 - 1099M (miscellaneous) and 1099N (non-employee compensation).
 - i. 1099M – includes at least \$10 in royalties (box 02), or at least \$600 in rents (box 01), or at least \$600 in prizes, awards, teacher incentives, research participant payment, and other income (box 03)
 - ii. 1099N – includes at least \$600 in non-employee compensation services or payments to an attorney (box 01)

- 2) Who to contact for 1099 related items:
 - If you are a student and have a question about your 1099 amount, please reach out to James Fore 713-500-3884 or James.C.Fore@uth.tmc.edu

 - If you are a non-employee and have a question about the payment amount please reach out to Pam Butler 713-500-8059 or Pamela.H.Butler@uth.tmc.edu

 - If you have a question about your royalty amount, please reach out to Pam Butler 713-500-8059 or Pamela.H.Butler@uth.tmc.edu

 - If you are an employee and have a question about your 1099 amount please reach out to Pam Butler 713-500-8059 or Pamela.H.Butler@uth.tmc.edu

 - If you are a teacher and have a question about your teacher incentive payment received through our Children's Learning Institute and what is/is not included, please reach out to Wendy Barrington 713-500-3227 or Wendy.H.Barrington@uth.tmc.edu

 - Other questions about the form, or if you need another one sent to you, please reach out to Accounting and Budget at 713-486-1099 and leave a voicemail with your name, number, supplier ID if known, and brief summary of your question. Your call will be returned within 2 business days.

- 3) What is the date range for the tax year 2021 1099N and 1099M form?
 - 01/01/2021 – 12/31/2021
 - The payments included are based on the payment date

- 4) I have a change to my Supplier information (address, name, tax ID), how do I update that information for my 1099?
- If you have a change to your supplier information, you will need to send a signed W-9 with the new information to our Procurement department. W9 can be faxed to 713-383-3722. Contact Judy Scypion 713-500-8192 Judy.Scypion@uth.tmc.edu or Alejandra Baez 713-500-4709 Alejandra.Baez@uth.tmc.edu if you have questions or don't have a way to fax the form.
 - The change to the supplier information has to be completed before we are able to send the updated 1099. Once you have updated your supplier information, you can let Accounting and Budget know that you need a corrected 1099 form by contacting 713-486-1099 and leave a voicemail with your information.
- 5) What is a W-9 form and where do I get one?
- A W-9 form is a request for taxpayer identification number and certification. It includes things like your name, address, federal tax classification, tax identification number (TIN), and signature
 - You can find a blank W-9 form on the <https://www.irs.gov> website under Forms & Instructions, and W-9 Form.
- 6) How do I know if I received a corrected 1099 form?
- The corrected check box on the form will be marked.
- 7) How long will it take to send me a corrected or additional 1099 form?
- It varies depending on your location and the postal service. It could also take longer in the COVID-19 environment to prepare the correction.
- 8) Can you email me the 1099 form? Or can I access it online?
- No – email is not a secure way to send your personal information such as your TIN. We mail the initial batch by 1/31 and any corrections will either be mailed or, if you live close to UTHealth, you can schedule a time to come and pick up the 1099 with your ID. Call 713-486-1099 and leave a voicemail to schedule.
- 9) I am the parent, spouse, or other relationship to the living person who received the 1099 from UTHealth. Can you answer my questions or tell me information about their 1099 if I call?
- No – we can only discuss the 1099 information with the person that received the 1099.
- 10) I have a question about how to fill out my taxes based on the 1099 form received, can you help me?
- No – we are not allowed to provide tax advice. If you have a question about how to complete your taxes you can discuss that with your tax advisor. We can only answer questions about the form itself as it relates to UTHealth.

Other Form Questions

- 11) I have a question about a 1042 form, who do I contact?
- Sherry Moser 713-500-3183 Sherry.L.Moser@uth.tmc.edu
- 12) I am an employee and I have a question about my W-2 or I need to know how to get it, who do I contact?
- Betty Williams 713-500-3960 Betty.Williams@uth.tmc.edu
 - If you have consented to receive your W-2 electronically you can log into your employee self service to retrieve it.
- 13) I am a student and have a question about my 1098-T (reflects tuition and fees and financial aid awarded to student for purpose of educational tax credits), who do I contact?
- Sue Thomey 713-500-3895 Sue.Thomey@uth.tmc.edu
- 14) I am a student and I received a stipend payment, should I have received a 1099 form?
- No - student stipends are not taxable for U.S. residents. You would not receive a tax form from UTHealth. If you want to know how much you were paid, email payroll@uth.tmc.edu and they can send you a copy of your last check.
- 15) I worked for UTHealth and am now a retiree, beneficiary, or former member who received payments from Teacher Retirement System (TRS), such as annuity payments, death benefits or a refund, will I get a 1099 from UTHealth?
- No – you would get a 1099R from TRS. You would need to contact their company for questions.
- 16) I am a student and I got a tuition refund, should I have received a 1099 or other tax document?
- No – tuition refunds are not taxable and you should not receive a 1099. You would also not have received a 1098-T for this either.