

Checklist of items prior to running 1098T Process:

1. Proof item types to verify the 1098T box is checked by running NDU_0108_SF item type tax flags
 - a. The Collaborative charges should not have the 1098T box selected. This is because those charges are being picked up on the providing institution's 1098T
2. Verify 1098T setup data (contact name, phone number, address usage, tax year)
Set Up SACR >Product Related>Student Financials>Taxes>1098-T TIN Table
3. Run SSN query NDU_041_SF to identify numbers that are all X's
4. Contact students in attempt to update invalid SSN's and document any communication attempts
5. Request Self-Service for 1098-T to be disabled via remedy ticket (prevents student to print the form too early)

Steps to generating a 1098T for your students:

1. Run the generate 1098T process for all students (even those with invalid SSN)
2. Review the message log for potential errors
3. Run the 1098T audit report – **Make sure to run as indicated in the instructions or you will not have any forms to print.**
4. **Carefully review the 1098T audit report. This is a summary of the forms that will be issued to your students. This is your chance to clean up the data. Please look for invalid social security numbers, and that any prior year adjustments are reflected on the audit report.** You need to rerun the audit to get your data updated so a form prints.
5. **UPDATE- this should not be the case this year... please test to ensure you no longer need to do this.** For those students with an invalid SSN, you will need to do a student override to force the 1098-T-
6. **Please make sure you have verified your data – there is no turning back. ☺**
7. ****After all adjustments are completed, submit remedy ticket to have self-service enabled to allow students to view their 1098T form (THIS IS AN IMPORTANT STEP to EXCLUDE those consented students from the print form process)**
8. Run the print form process – Please make sure you run as **print only!** Campus Solutions will generate a submittal file at a later date. If you are prompted to enter a file name or path, go back.
9. Merge the 1098T data (excel file) with the template (word file).
10. Print the 1098T's generated by the template (Word document).
11. Mail the 1098T's to the students.
12. Send out a communication to students stating 1098-T are available to print
13. The 1098-T program has continued to mask the first 5 digits of the SSN for both the printed and online version of the form

**** Please read number 7 carefully and make a note to have self-service turned back on!**

To generate the 1098-T information

Student Financials > Taxes > Generate 1098-T

**You will need to return to this navigation to force 1098T's for students that need a form.*

Generate 1098-T
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: begins with

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Use your run control for 1098T's, you may use the one from last year. If the user does not have one, then one needs to be created by clicking on the Add a New Value hyperlink.

Generate 1098-T

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

Enter a Run Control and click , if a new run control is needed.

Generate 1098-T


Run Control ID:


[Report Manager](#) [Process Monitor](#)


Run

Control Information

Find | View All First 1 of 1 Last

*Federal TIN: 

*Calendar Year: 

Student Override  

Bypass Validation Edits

Citizenship



Academic Credit

Financial Aid

Financial Info

Student Override


Customize | Find | View All |  First 1 of 1 Last

*ID	National ID	Force 1098-T		
1		<input type="checkbox"/>		

Use the lookup  to select your federal TIN, and calendar year (2011).

- To bypass any validation Edits NDUS recommends you check the following boxes
- Citizenship (1098T eligible students will receive a 1098T regardless of citizenship status)
- Academic Credit (1098T eligible students will receive a 1098T regardless of Academic Credit)
- Financial Aid (1098T eligible students will receive a 1098T regardless FA exceeding charges)

NOT RECOMMENDED DO NOT select Financial Info box. Checking this box will return ALL students regardless if they have eligible 1098T charges.

Click . Click **Run** to run the process.

Menu

- Student Financials
 - Tuition and Fees
 - Charges and Payments
 - Bill Customers
 - Cashiering
 - Payment Plans
 - International Health Coverage
 - Refunds
 - Collections
 - GL Interface
 - StudyLink
- Taxes
 - Tax Reports
 - Generate 1098-T
 - Edit 1098-T Data
 - Review 1098-T Data
 - Revoke 1098-T Consent
 - Create Student Job Data
 - Generate T4A
 - Review T4A Data
 - Generate T2202A
 - Edit T2202A Data
 - Print T2202A
 - Create T2202A Extract File
 - Generate Donation Receipts
 - Generate Tax Receipts

Process Scheduler Request

User ID: auhlenkamp Run Control ID: Generate_1098T

Server Name: [Dropdown] Run Date: 12/08/2008 [BT]

Recurrence: [Dropdown] Run Time: 3:18:46PM [Reset to Current Date/Time](#)

Time Zone: [Dropdown]

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Populate 1098-T Detail	SFP1098P	COBOL SQL	(None)	(None)	Distribution

OK Cancel Refresh

Server Name: LEAVE BLANK, click OK

Click on the [Process Monitor](#) link – it could take up to an hour to process the information.

Upon success of the process, Click the [Details](#) hyperlink

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 - Review T4A Data
 - Generate T2202A
 - Edit T2202A Data
 - Print T2202A
 - Create T2202A Extract File
 - Generate Donation Receipts
 - Generate Tax Receipts

Process Detail

Process

Instance: 1888856 Type: COBOL SQL

Name: SFP1098P Description: Populate 1098-T Detail

Run Status: Queued Distribution Status: N/A

Run **Update Process**

Run Control ID: Generate_1098T Hold Request

Location: Server Queue Request

Server: Cancel Request

Recurrence: Delete Request

Restart Request

Date/Time **Actions**

Request Created On: 12/08/2008 3:19:37PM CST [Parameters](#) Transfer

Run Anytime After: 12/08/2008 3:18:46PM CST [Message Log](#)

Began Process At: Batch Timings

Ended Process At: [View Log/Trace](#)

Click on [View Log Trace](#)

PEOPLE SOFT **Report/Log Viewer**

Instance: 419292 Type: COBOL SQL

Name: SFP1098P Run Cntl ID: Generate_1098T

Status: Success Submitted By: auhlenkamp

Server: PSNT Recurrence:

[Populate 1098-T Detail](#)

Name	File Size	File Creation Date
Message Log	90545 bytes	Thu Dec 08 11:03:05 2005

The message log will list the errors. It is suggested that you print this report. Close out of this screen after you print the information.

Definitions of Errors- What do they mean???

EXAMPLES:

EMPLID: 1111111 not eligible for 1098-T - No Financial Info

This error will be given if all amount boxes have a value of ZERO

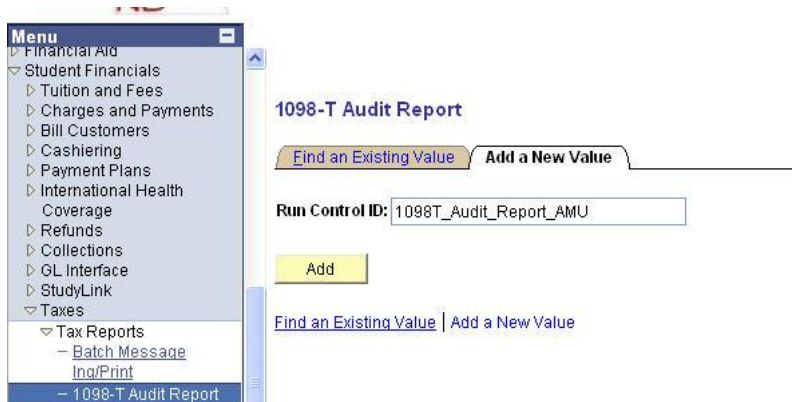
To Print the 1098 T audit report

Student Financials > Taxes > Tax Reports>1098-T Audit Report



The screenshot shows the '1098-T Audit Report' interface. On the left is a 'Menu' tree with 'Taxes' expanded to 'Tax Reports', where '1098-T Audit Report' is selected. The main area has the title '1098-T Audit Report' and the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. A search field is present with a dropdown menu set to 'begins with'. There is an unchecked 'Case Sensitive' checkbox. At the bottom of the search area are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search area are two hyperlinks: 'Find an Existing Value' and 'Add a New Value'.

Click the [Add a New Value](#) hyperlink if adding a new run control, otherwise select appropriate run control for this process



This screenshot shows the same interface as the previous one, but with the 'Run Control ID' field populated with the text '1098T_Audit_Report_AMU'. An 'Add' button is now visible below the search area. The 'Find an Existing Value' and 'Add a New Value' hyperlinks are still present at the bottom.

Enter a Run Control and click [Add](#) or select Find an Existing Value and select

Report Mode: Audit and Validate
 Print Selection: All 1098-T's
 Primary sort: SSN- This sort will list the student's SSN#'s with all X's at the beginning and/or end of the report.

NOTE NEW** **DO NOT** select the "Student Override" box for student's that have an invalid SSN#. We have modified the program to include ALL students with invalid SSN's

Secondary Sort: ID (optional sort)

TIN Control Info: Look up your school's Federal TIN and select the calendar year.

Run the process

Server Name: LEAVE BLANK
 *Note: Make sure report is run in PDF format.

Click **OK**
 Click the [Process Monitor](#) link

Menu

- Financial Aid
 - Student Financials
 - Tuition and Fees
 - Charges and Payments
 - Bill Customers
 - Cashiering
 - Payment Plans
 - International Health Coverage
 - Refunds
 - Collections
 - GL Interface
 - StudyLink
 - Taxes
 - Tax Reports
 - Batch Message Log/Print
 - 1098-T Audit Report
 - 1098-T Form Print
 - GST Tax Summary Report
 - Individual GST Tax Detail
 - Organization GST Tax Detail
 - Generate 1098-T
 - Edit 1098-T Data
 - Review 1098-T Data
 - Revoke 1098-T Consent
 - Create Student Job Data

Process List

View Process Request For

User ID: auhlenkamp Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1888850		SQR Report	SF1098VP	auhlenkamp	12/08/2008 2:30:56PM CST	Queued	N/A	Details

Go back to 1098-T Audit Report

Save

Click [Details](#) upon success of the process

PeopleSoft. Home

Home > PeopleTools > Process Monitor > Inquire > Process Requests

Process Detail

Process

Instance: 419293 Type: SQR Report

Name: SF1098VP Description: 1098-T Validation and Audit

Run Update Process

Run Control ID: Generate_1098T

Location: Server

Server: PSNT

Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time Actions

Request Created On: 12/08/2005 12:21:40PM CST [Parameters](#) Transfer

Run Anytime After: 12/08/2005 12:20:53PM CST [Message Log](#)

Began Process At: 12/08/2005 12:21:53PM CST Batch Timings

Ended Process At: 12/08/2005 12:22:12PM CST [View Log/Trace](#)

OK Cancel

Click [View/log trace](#)

PEOPLE Soft Report/Log Viewer

Instance: 419293 Type: SQR Report

Name: SF1098VP Run Cntl ID: Generate_1098T

Status: Success Submitted By: auhlenkamp

Server: PSNT Recurrence:

1098-T Validation and Audit

Name	File Size	File Creation Date
Trace File	18234 bytes	Thu Dec 08 12:21:53 2005
SF1098VP_419293.PDF	346897 bytes	Thu Dec 08 12:21:58 2005
Message Log	1563 bytes	Thu Dec 08 12:21:53 2005

Click on the [PDF file](#)

To Print the 1098-T form to be sent to the student.

Navigate to the following:

Student Financials > Tax Reports > 1098-T Form Print



Create a new run control to print these forms by clicking on the Add a New Value Link

1098-T Print

Run Control ID: LRSC

[Report Manager](#) [Process Monitor](#)

Run

Transmitter's TIN:	450281889	*Calendar Year:	2011	Lake Region State College
*Media:	Print Only	<input type="checkbox"/> Alignment Run	Alignment Count:	[]
Filing Status:	Original	<input type="checkbox"/> Test File	Replacement Alpha Character:	[]
Primary Sort:	ID	Secondary Sort:	Last Name	

File Parameters

TIN Control Information		Find View All	First 1 of 1	Last
*TIN:	450281889	*Calendar Year:	2011	Lake Region State College
				<input type="checkbox"/> Student Override
Student Override		Find View All	First 1 of 1	Last
*ID:	[]			

Save

Return to Search

Refresh

Add

Update/Display

You need to enter the following information to run this process:

- A. Enter your Transmitter's TIN(Tax Information Number), search by clicking on the look up icon
- B. The Calendar Year will be 2011 tax year
- C. The Media needs to be **PRINT ONLY** **** This is very important you choose this media****
- D. Filing Status is Original
- E. Primary Sort- School Option
- F. Secondary Sort- School Option

UNDER TIN Control Information

- A. Enter your schools TIN
- B. Calendar Year = 2011
- C. Save this information on your run control and click on the run button

Process Scheduler Request

User ID: auhlenkamp Run Control ID: LRSC

Server: Run Date: 11/22/2011

Recurrence: Run Time: 2:12:32PM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Print 1098-T Forms	SF1098RP	SQR Report	Web	PDF	Distribution

[OK](#) [Cancel](#) [Refresh](#)

Make sure the server name is LEFT BLANK

The type and format can remain as Web and PDF then click the OK button

Click on the process monitor until the process has completed to success

Click on the details link and the view log trace link and you should return an instance number (Example is below)

Report

Report ID: 53830 Process Instance: 1612807 [Message Log](#)

Name: SF1098RP Process Type: SQR Report

Run Status: Success

Print 1098-T Forms

Distribution Details

Distribution Node: PSREPORTS Expiration Date: 12/07/2011

File List

Name	File Size (bytes)	Datetime Created
NDUSF1098T_1612807.CSV	1,112,195	11/22/2011 11:20:36.245000AM CST
SF1098RP_1612807.PDF	1,080,447	11/22/2011 11:20:36.245000AM CST
SF1098RP_1612807.out	353	11/22/2011 11:20:36.245000AM CST
SQR_SF1098RP_1612807.log	1,748	11/22/2011 11:20:36.245000AM CST

Distribute To

Distribution ID Type	*Distribution ID
User	auhlenkamp

A. Right click on the NDUSF1098T CSV file: and select Save Target as

B. Save the data as a csv file (please look at screen shot) and the save as type is ALL file **NOT EXCEL**



a. Dec 07 10:14:16 2006

This is an example of what the data school look like.

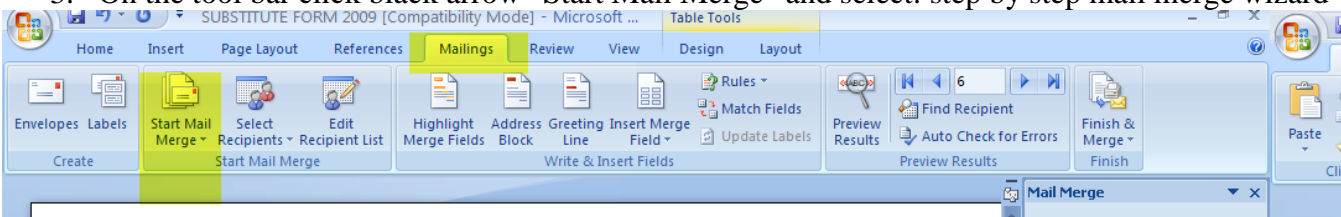
FILER_NAME	FILER_CONTACT	FILER_PHONE	FILER_ADDR1	FILER_CITY	FILER_STATE	FILER_ZIP	FILER_TIN	STUDENT_NAME	STUDENT_TIN	ST
Dickinson State University	Dickinson State University	701/483-2532	Box 999	Dickinson	ND	99999	45-600248			55

You will need to save this data to a folder on your hard/shared drive:

1. Open the file from within Excel. The Text Import Wizard should open up.
2. In Step 1 of 3 – Click on “Delimited”. Click Next.
3. In Step 2 of 3 – Click on the delimiter for “Comma”. You can remove the “Tab” delimiter. Click Next.
4. In Step 3 of 3 – Within the data preview, click on the column header that says General. Holding down the Shift button, scroll over to the last column and again click on that header that says General. Now click on the “Text” button within the Column Data Format. Click on Finish.
5. All columns have now been imported in as Text. This format is easier to work with importing the information into Word.
6. Save the file as an Excel Workbook.

You will use the Microsoft merge wizard to merge this data into your 1098T template form

1. Open up your 1098T form template
2. Click on Mailings Tab
3. On the tool bar click black arrow “Start Mail Merge” and select: step by step mail merge wizard



7. You will need to browse for your data (excel data) to be merged
 - a. Step 1 of 6 you will need to select the type of document, the “Letters” radio button should already be select, once verified click on Next: starting document

2011 SUBSTITUTE FORM 1098-T
TUITION PAYMENTS STATEMENT
THIS IS IMPORTANT TAX INFORMATION AND IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE.

INSTITUTION: «FILER_TIN» STUDENT: «STUDENT_TIN»

«FILER_NAME»
«FILER_ADDR1»
«FILER_CITY» «FILER_STATE»
«FILER_ZIP»

«STUDENT_NAME»
«STUDENT_ADDR1»
«STUDENT_ADDR2»
«STUDENT_CITY» «STUDENT_STATE»
«STUDENT_ZIP»

Box 2	Amounts billed for qualified tuition and related expenses.	«AMOUNT_BILLED»
Box 4	Adjustments made for a prior year.	«PRIOR_YR_ADJ»
Box 5	Scholarships or grants.	«FINANCIAL_AID»
Box 6	Adjustments to scholarships or grants for a prior year.	«PRIOR_YR_FA_ADJ»
Box 8	At least half-time student.	«STUDENT_HALF_IND»
Box 9	Graduate Student.	«STUDENT_GRAD_IND»

Box 2. Shows the total amount billed in the calendar year for qualified tuition and related expenses less any qualified waivers.

Box 4. Includes any reduction made during the calendar year to qualified tuition and related expenses reported in Box 2 on a prior year Form 1098-T. This amount may reduce any allowable education credit you may claim for the prior year. See Form 8863 or Publication 970 for more information.

Box 5. Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of any allowable tuition and fees deduction or the education credit you may claim for the year.

Box 6. Shows any reduction made during the calendar year to scholarships or grants on prior year Form 1098-T. This amount may affect the amount of any allowable tuition and fees deduction or the education credit you may claim for the prior year. See Form 8863 for how to report these amounts.

Box 8. Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of

Select document type

What type of document are you working on?

Letters

E-mail messages

Envelopes

Labels

Directory

Letters

Send letters to a group of people. You can personalize the letter that each person receives.

Click Next to continue.

Step 1 of 6

Next: Starting document

b. Step 2 of 6 ask how you want to set up your letters? Verify that the “Use the current document” radio button is selected and click Next: Select recipients

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«FILER_NAME»
«FILER_ADDR1»
«FILER_CITY» «FILER_STATE»
«FILER_ZIP»

«STUDENT_NAME»
«STUDENT_ADDR1»
«STUDENT_ADDR2»
«STUDENT_CITY» «STUDENT_STATE»
«STUDENT_ZIP»

Box 2	Amounts billed for qualified tuition and related expenses.	«AMOUNT_BILLED»
Box 4	Adjustments made for a prior year.	«PRIOR_YR_ADJ»
Box 5	Scholarships or grants.	«FINANCIAL_AID»
Box 6	Adjustments to scholarships or grants for a prior year.	«PRIOR_YR_FA_ADJ»
Box 8	At least half-time student.	«STUDENT_HALF_IND»
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Box 8. Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution. If you are at least a one-half time student for one academic period that begins during the year, you meet one of the requirements to qualify for the Hope credit. If enrolled less than one-half time for at least one

Select starting document

How do you want to set up your letters?

Use the current document

Start from a template

Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

Step 2 of 6

Next: Select recipients

Previous: Select document type

c. Step 3 of 6 Select recipients. Verify that the “Use an existing list” radio button is selected. You will want to click on the blue Browse hyperlink to find the spreadsheet of data that you saved in the print forms process, once you select the file, a screen will pop up to view the data. Select OK button click Next: Write your letter

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INSTITUTION:
«FILER_TIN»

«FILER_NAME»
«FILER_ADDR1»
«FILER_CITY» «FILER_STATE»
«FILER_ZIP»

«STUDENT_NAME»
«STUDENT_ADDR1»
«STUDENT_ADDR2»
«STUDENT_CITY» «STUDENT_STATE»
«STUDENT_ZIP»

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	FILER_NAME	FILER_CONTACT	FILER_PHONE
C:\Users\ange...	Lake Region State ...	Val Wood	701/662-1504
C:\Users\ange...			
C:\Users\ange...			
C:\Users\ange...			
C:\Users\ange...			
C:\Users\ange...			

Data Source: C:\Users\angela.oleary\Documei

Refine recipient list

Sort...
Filter...
Find duplicates...
Find recipient...
Validate addresses...

Edit... Refresh

OK

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- Box 8.** Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution. If you are at least a one-half time student for one academic period that begins during the year, you meet one of the requirements to qualify for the Hope credit. If enrolled less than one-half time for at least one

d. Step 4 of 6 Click on Next: Preview your letters

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INSTITUTION:
«FILER_TIN»

«FILER_NAME»
«FILER_ADDR1»
«FILER_CITY» «FILER_STATE»
«FILER_ZIP»

«STUDENT_NAME»
«STUDENT_ADDR1»
«STUDENT_ADDR2»
«STUDENT_CITY» «STUDENT_STATE»
«STUDENT_ZIP»

STUDENT:
«STUDENT_TIN»

Box 2	Amounts billed for qualified tuition and related expenses.	«AMOUNT_BILLED»
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Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

Next: Preview your letters

- a. Step 5 of 6 Once you have previewed your letter, a sample merge letter will appear. Please review and verify all data has merged successfully and accurate and you can move on to the last step.

2011 SUBSTITUTE FORM 1098-T
TUITION PAYMENTS STATEMENT
 THIS IS IMPORTANT TAX INFORMATION AND IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE.

<p>INSTITUTION: .89 Lake Region State College 1801 College Drive North Devils Lake ND 58301</p>	<p>STUDENT: *** **)</p>	<table border="1"> <tr> <td>Box 2</td> <td>Amounts billed for qualified tuition and related expenses.</td> <td style="text-align: right;">492.22</td> </tr> <tr> <td>Box 4</td> <td>Adjustments made for a prior year.</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Box 5</td> <td>Scholarships or grants.</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Box 6</td> <td>Adjustments to scholarships or grants for a prior year.</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Box 8</td> <td>At least half-time student:</td> <td></td> </tr> <tr> <td>Box 9</td> <td>Graduate Student:</td> <td></td> </tr> </table>	Box 2	Amounts billed for qualified tuition and related expenses.	492.22	Box 4	Adjustments made for a prior year.	0.00	Box 5	Scholarships or grants.	0.00	Box 6	Adjustments to scholarships or grants for a prior year.	0.00	Box 8	At least half-time student:		Box 9	Graduate Student:	
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Box 2. Shows the total amount billed in the calendar year for qualified tuition and related expenses less any qualified waivers.

Box 4. Includes any reduction made during the calendar year to qualified tuition and related expenses reported in Box 2 on a prior year Form 1098-T. This amount may reduce any allowable education credit you may claim for the prior year. See Form 8863 or Publication 970 for more information.

Box 5. Shows the total of all scholarships or grants administered and processed by the eligible educational institution. The amount of scholarships or grants for the calendar year (including those not reported by the institution) may reduce the amount of any allowable tuition and fees deduction or the education credit you may claim for the year.

Box 6. Shows any reduction made during the calendar year to scholarships or grants on prior year Form 1098-T. This amount may affect the amount of any allowable tuition and fees deduction or the education credit you may claim for the prior year. See Form 8863 for how to report these amounts.

Box 8. Shows whether you are considered to be carrying at least one-half the normal full-time workload for your course of study at the reporting institution. If you are at least a one-half time student for one academic period that begins during the year, you meet one of the requirements to qualify for the Hope credit. If enrolled less than one-half time for at least one semester you still may be eligible to claim the tuition and fee deduction or the lifelong learning credit

Preview your letter

One of the merge letters will appear here. To preview one of the following letters, click the Recipient button.

[Find a recipient](#)

Make changes

You can also change the recipient information for a letter.

[Edit recipient](#)

[Exclude this recipient](#)

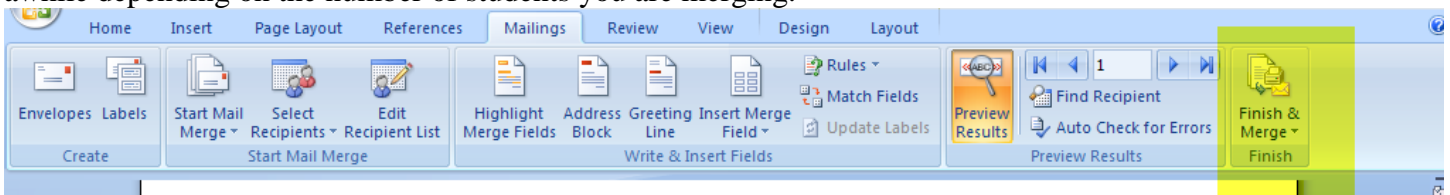
When you have finished previewing your letters, click the Merge button to print the merged letters or the individual letters and comments.

Step 5 of 6

[Next: Complete](#)

[Previous: Preview](#)

TIP: To view all students in a word document format, select the Finish & Merge and select “edit individual documents. Once this happens all records are merging into a separate word document. This process can take awhile depending on the number of students you are merging.



On line 1098-T Inquiry

Student Financials > Taxes>Review 1098-T Data

Menu

- Financial Aid
 - Student Financials
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 - Charges and Payments
 - Bill Customers
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 - Edit T2202A Data
 - Print T2202A

1098-T Inquiry
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID: begins with [dropdown] [input] [magnifying glass]

Federal TIN: = [dropdown] [input] [magnifying glass]

Calendar Year: = [dropdown] [input] [magnifying glass]

National ID: begins with [dropdown] [input]

Campus ID: begins with [dropdown] [input]

Last Name: begins with [dropdown] [input]

First Name: begins with [dropdown] [input]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Enter the student's emplid, your school's Federal TIN and the calendar year and then click **Search**

Please note: If the student is enrolled at other NDUS schools, they will have more than one 1098-T.

The details for each box on the 1098-T is listed here.

Manual adjustments for a 1098-T already generated (but not transmitted to the IRS):

Student Financials>Taxes>Edit 1098-T Data

1098-T Data

ID: _____ Federal TIN: _____ Calendar Year: _____

1098-T Status Find | View All | First 1 of 1 Last

Seq. Nbr. 1 Overriden Printed 01/18/08 2:15:58PM File Created 03/27/08 9:22:19AM
 Correction Correction Type: _____ 'Validation Status: Passed Validation
Date Created: 12/19/07 3:03:24PM Disable 1098-T Self Service Date Updated: _____

Student 1098-T Data

SSN: _____ (1) Payments Received: _____ (5) Financial Aid: _____
First Name: _____ (2) Amount Billed: 540.00 (6) Prior Year FA Adj: _____
Middle Name: _____ (3) Reporting Method Change (7) Includes Future Period
Last Name: _____ (4) Prior Year Adj: _____ (8) Half Time
 (9) Graduate

1098-T Detail Items Find | View All | First 1 of 1 Last

Box #	Item Amount	Business Unit	Item Type	Account Type	Item Term	Description	Actual Billing Date	Date Posted	Payment Date
1 002	540.00	MASU1	100000019000	TUT	0730	Dual Credits	01/16/2007	01/03/2007	

When you 'click' the you are able to adjust the amounts. Make sure to after you have made changes to the student's 1098-T.

NOTE** When making any adjustments esp. to boxes 4 and 6, you have to **enter a positive amount**. PeopleSoft does not recognize negative amounts and the File sent to the IRS will be automatically rejected. Any positive adjustments in prior and current year are reflected in boxes 2 and 5.

Note: Student 1098-t boxes are no longer shaded after you click the button and you can make changes to the data. Also, note there is more than one record for the student - the one generated by PS and one after you have made changes. **IMPORTANT: Need to uncheck the Correction field box. Corrections are ONLY applicable after the file has been transmitted to the IRS which will be after March.**

1098-T Data

ID: .00 Federal TIN: 450 Calendar Year: 2011

1098-T Status Find View All First 1 of 2 Last

Seq. Nbr. 2 Overridden Printed File Created

Uncheck Correction Correction Type: *Validation Status: Pending Validation

12/08/2011 11:25:16AM **Override Data** Date Updated: 12/08/2011 11:25:16AM

Disable 1098-T Self Service

Student 1098-T Data

SSN: (1) Payments Received: (5) Financial Aid:

First Name: n (2) Amount Billed: 492.22 (6) Prior Year FA Adj:

Middle Name: (3) Reporting Method Change (7) Includes Future Period

Last Name: n (4) Prior Year Adj: (8) Half Time

[Student Address](#) (9) Graduate

1098-T Detail Items Customize Find View All First 1-5 of 8 Last

Box #	Item Amount	Business Unit	Item Type	Account Type	Item Term	Description	Actual Billing Date	Date Posted	Payment Date
1 002	0.09		200000070000	TUT	1210	MAND FEE-NDSA	10/05/2011	09/14/2011	
2 002	9.00		200000020001	TUT	1210	MAND FEES-ACTIVITY 1	10/05/2011	09/14/2011	
3 002	15.00		200000030001	TUT	1210	MAND FEES-ACTIVITY 2	10/05/2011	09/14/2011	

After the student's data has been adjusted, the data will also need to pass validation by running 1098T Audit Report. Run the 1098T Audit Report by selecting the Student Override box and entering the student's ID number.

The 1098T Form Print process will also need to be run. To do this make sure the Filing Status field has the "Print Only" value selected. Also, make sure to select the individual students that need the updated 1098T form by selecting the student override box and entering the Emplids.

1098-T Print

Run Control ID: LRSC

[Report Manager](#) [Process Monitor](#)

Run

Transmitter's TIN: 450281889	*Calendar Year: 2011	Lake Region State College	
*Media: Print Only	<input type="checkbox"/> Alignment Run	Alignment Count:	<input type="checkbox"/>
Filing Status: Original	<input type="checkbox"/> Test File	Replacement Alpha Character:	<input type="checkbox"/>
Primary Sort: ID	Secondary Sort:	Last Name	

File Parameters

TIN Control Information		Find View All	First	1 of 1	Last
*TIN: 450281889	*Calendar Year: 2011	Lake Region State College		<input checked="" type="checkbox"/> Student Override	
Student Override		Find View All	First	1 of 1	Last
*ID: 09	Br				

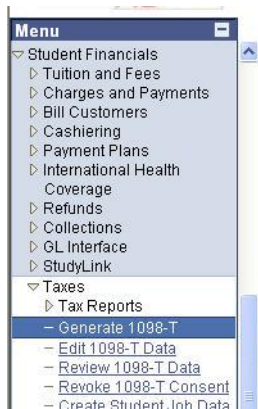
[Save](#) [Return to Search](#) [Refresh](#)

[Add](#) [Update/Display](#)

To create a 1098-T for a student who has not been generated a 1098T

Student Financials > Taxes > Generate 1098-T

Find an existing value – enter your run control from when you ran the 1098-T process, or search for the run control.



Generate 1098-T
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Check the student override box, and enter the student's Emplid. Also, check the Force 1098-T box hit [Save](#) & [Run](#) the process.

Run Control ID: LRSC

[Report Manager](#) [Process Monitor](#)

Run

Control Information Find | View All | First 1 of 1 Last

*Federal TIN: *Calendar Year: Student Override

Bypass Validation Edits

Citizenship Academic Credit Financial Aid Financial Info

Student Override Customize | Find | View All | First 1 of 1 Last

ID	National ID	Force 1098-T
1		<input checked="" type="checkbox"/>

[Save](#) [Return to Search](#) [Refresh](#)

[Add](#) [Update/Ds play](#)

- Menu
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 - Review T4A Data
 - Generate T2202A
 - Edit T2202A Data

Process Scheduler Request

User ID: auhlenkamp Run Control ID: Generate_1098T

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Populate 1098-T Detail	SFP1098P	COBOL SQL	(None)	(None)	Distribution

Server Name: LEAVE BLANK, click

Click on the [Process Monitor](#) link – it will take a few minutes to process the information.

Menu

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 - Review 1098-T Data
 - Revoke 1098-T Consent

Process List

View Process Request For

User ID: auhlenkamp Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1888856		COBOL SQL	SFP1098P	auhlenkamp	12/08/2008 3:18:46PM CST	Queued	N/A	Details
<input type="checkbox"/>	1888850		SQR Report	SF1098VP	auhlenkamp	12/08/2008 2:30:56PM CST	Success	Posted	Details

Upon success of the process, Click the [Details](#) hyperlink

Menu

- Student Financials
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 - Generate T4A
 - Review T4A Data
 - Generate T2202A
 - Edit T2202A Data
 - Print T2202A
 - Create T2202A Extract File
 - Generate Donation Receipts
 - Generate Tax Receipts

Process Detail

Process

Instance: 1888856 Type: COBOL SQL

Name: SFP1098P Description: Populate 1098-T Detail

Run Status: Queued Distribution Status: N/A

Run **Update Process**

Run Control ID: Generate_1098T

Location: Server

Server:

Recurrence:

Hold Request

Queue Request

Cancel Request

Delete Request

Restart Request

Date/Time **Actions**

Request Created On: 12/08/2008 3:19:37PM CST [Parameters](#) [Transfer](#)

Run Anytime After: 12/08/2008 3:18:46PM CST [Message Log](#)

Began Process At: [Batch Timings](#)

Ended Process At: [View Log/Trace](#)

Click on [View Log Trace](#)

PEOPLE Soft Report/Log Viewer

Instance: 419292 Type: COBOL SQL

Name: SFP1098P Run Cntl ID: Generate_1098T

Status: Success Submitted By: auhlenkamp

Server: PSNT Recurrence:

[Populate 1098-T Detail](#)

Name	File Size	File Creation Date
Message Log	90545 bytes	Thu Dec 08 11:03:05 2005

The message log will list the errors as well as the number of records added. It is suggested that you print this report. Close out of this screen after you print the information.

*If you go the 1098T inquiry (see instructions above) you will see the student's information.

After the 1098T has been generated, the data will also need to pass validation by running the 1098-T Audit Report. Run the 1098-T Audit Report by using selecting the Student Override and entering the student's ID number.

1098-T Audit Report

Run Control ID: []

[Report Manager](#) [Process Monitor](#)

*Report Mode:

*Print Selection:

*Primary Sort:

*Secondary Sort:

TIN Control Information

Find | View All First 1 of 1 Last

*Federal TIN:

*Calendar Year:

Student Override

Student Override

Find | View All First 1 of 1 Last

*ID:

The 1098T Form Print process will also need to be run. To do this make sure the Filing Status field has the "Print Only" value selected. Also, make sure to select the individual students that need the updated 1098T form by selecting the student override box and entering the Emplids.

1098-T Print

Run Control ID: LRSC

[Report Manager](#) [Process Monitor](#)

Run

Transmitter's TIN:	<input type="text" value="450281889"/>	*Calendar Year:	<input type="text" value="2011"/>	Lake Region State College
*Media:	<input type="text" value="Print Only"/>	<input type="checkbox"/> Alignment Run	Alignment Count:	<input type="text"/>
Filing Status:	<input type="text" value="Original"/>	<input type="checkbox"/> Test File	Replacement Alpha Character:	<input type="text"/>
Primary Sort:	<input type="text" value="ID"/>	Secondary Sort:	<input type="text" value="Last Name"/>	

File Parameters

TIN Control Information			Find View All	First	1 of 1	Last
*TIN:	<input type="text" value="450281889"/>	*Calendar Year:	<input type="text" value="2011"/>	Lake Region State College	<input checked="" type="checkbox"/> Student Override	
Student Override			Find View All	First	1 of 1	Last
*ID:	<input type="text" value="05"/>	Br				

[Save](#) [Return to Search](#) [Refresh](#)

[Add](#) [Update/Display](#)

Trouble-shooting why a 1098T has not printed:

Verify the student has a validation status of Passed validation. If you have another value in this field the student's 1098T was not printed.

Other

People books has some very useful information to aid you in the 1098T process.

After the 1098T file has been transmitted:

- The 1098T file is transmitted to the IRS at the end of March.
- Keep a separate log of:
 - New 1098Ts for students who did not previously receive one.
 - Corrected 1098Ts that had been previously transmitted.
- Report these logs to Marie at the end of April for an additional transmittal to be completed in early May.
- After the transmittal in early May, a ticket will need to be submitted in order to have any new records electronically submitted to the IRS.

