Copy/Update 1098-T Table/Template

Purpose: Use this document as a reference for the copying or updating your 1098-T Table.

Audience: Student Financials Staff

⊘ You must have at least one of these local college managed security roles:

• ZD SACR SF All Config
• ZZ SACR SF Bill Col Tax Config

  If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

ⓘ Each year, ctcLink requires a new copy of 1098-T table information to be created (copied over from previous year) for the file generation process.

  It is crucial that the data contained in the table is reviewed and _verified as proper_ for the upcoming tax processing.

Navigation: Set up SACR > Product Related > Student Financials >Taxes > 1098-T TIN Table

1. The 1098-T TIN Table search page displays.
2. Select the **Add a New Value** tab.
3. Enter the **Federal TIN**.
4. Enter **Calendar Year** that you will be processing and select the **Add** button.
5. The 1098-T TIN Table page displays.
6. Select the **Copy TIN Setup** button.
7. The **Enter From Year** window displays.
8. Enter the **From Year** then select the **OK** button**.**
9. Ensure all of the fields are updated and current.
10. Ensure you enter your **Transmission Code** if not already populated. Please see the below information in green.
11. Select the **Template Definition** field within the **1098-T Self Service** section.
12. Select the most recent year.
13. Under the **SSN Masking Option** section, select the **Masking Options** drop-down and select an option.
14. Select the **1098-T Citizenship** tab and the 1098-T Citizenship page displays.
15. Under the **Valid Citizenship Statuses** section, enter or search for a **Citizenship Status**.

- Note: Only Citizenship Statuses entered will receive a 1098-T.

16. Select the **Add a New Row [+]** button or the **Remove a Row [-]** button as necessary.
17. Select the **Save** button.
18. Process complete.

> ⚠ Ensure that you update the **Template Definition** field once the new template becomes available some time after October.

> 💡 To file 1098-T tax forms with the Internal Revenue Service (IRS) electronically, you must first file IRS Form 4419, Application for Filing Information Return Magnetically/ Electronically. If the IRS accepts your application to file electronically, you are assigned a five-character alphanumeric Transmitter Control code. Enter this code in the Transmission Code field.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the external link to 1098-T TIN Table. This link will open in a new tab/window.