

1098-T Processing

Purpose: Use this document as a guide for generating the 1098-T notices. [Follow the 5 process steps in order.](#)

Audience: Student Financials staff.

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

- ZZ SF Taxes 1098T

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

1. Generate 1098-T

Navigation: Student Financials > Taxes > Generate 1098-T

1. The Generate 1098-T run control ID search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA140_GEN_1098T (Generate, 1098-T).
3. The Generate 1098-T page displays.
4. In the **Control Information** section, enter or search for the:
 - A. **Federal TIN.**
 - B. **Calendar Year.**
 - C. **Alternate NID Type** of ITIN.
5. In the **Bypass Validation Edits** section, select the appropriate checkbox(s).
 - A. PeopleBooks Definitions:
 - I. **Citizenship** = Select to bypass the Citizenship edit, so that a 1098-T is produced for all students with eligible charges regardless of citizenship status.

- II. **Academic Credit** = Select to bypass the Earned Academic Credit edit, so that a 1098-T is produced for all students with eligible charges, even if they are enrolled in classes that earn no academic credit.
 - III. **Financial Aid** = Select to bypass the Financial Aid edit, so that a 1098-T is produced for students who have eligible charges paid entirely by Financial Aid.
 - IV. **Financial Info** = Select to produce a 1098-T for students who have no financial information in boxes one through six. If the students are currently enrolled, the 1098-T is produced.
6. Do not select the **Student Override** checkbox.
 7. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
 8. Section Complete.

Generate 1098-T

Run Control ID WAXXX_GEN_1098T_XX
Report Manager
Process Monitor
Run

Control Information
Find | View All
First 1 of 1 Last

*Federal TIN
*Calendar Year
Alternate NID Type

Bypass Validation Edits

☐ Citizenship
☐ Academic Credit
☐ Financial Aid
☐ Financial Info

☐ Student Override

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

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

Save
Notify
Refresh
Add
Update/Display

Video Tutorial

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

View Tutorial Via Panopto

View the external link to [Generate 1098-T](#). This link will open in a new tab/window.

2. Update Student TIN Request Box

This process is dependent upon the successful completion of the Request student TIN/SSN communication listed in the *9.2 1098T Set Up QRG*.


The below process will check the box in the STUDENT'S TIN field on the 1098-T that is sent to the IRS.

Navigation: Student Financials > Taxes > Update 1098-T TIN Request

1. The Update 1098-T TIN Request run control ID search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA140_UPDATE_1098T_TIN (Update 1098-T TIN Request Box).
3. The 1098-T TIN Request Update page displays.
4. In the **Population Selection** section, enter or search for the:
 - A. **Selection Tool: PS Query**
 - B. Enter **Query Name: QCS_SR_COMM_COMPL_1098UPD**
 - C. Select **Edit Prompts**.
 - I. The Query Prompts window displays.
 - II. Enter the **Institution**.
 - III. Enter the **Letter Code** used in the 3C SSN TIN Request process designated for your institution. Letter codes may vary per institution.
 - IV. Select the **OK** button.
 - V. The Query Prompts window disappears.
5. Select the **Preview Selection Results** link to ensure students are being populated. If they do not, your Letter Code may not match the 3C SSN TIN Request letter code utilized.
6. In the **Parameters** section, enter or search for the:

- A. **Federal TIN.**
- B. **Calendar Year.**

7. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
8. Section complete.

 If you **are not using** the 3C Process and instead sending communications outside of ctcLink, please be sure to upload a spreadsheet of ID's (that had been sent the communication) using the **External File** upload process on this page instead of the above PS Query selection.

It is imperative that this step is completed to success.

1098-T TIN Request Update

Run Control ID WAXXX_UPDATE_1098T_TIN_XX

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

Population Selection

Selection Tool PS Query

Query Name QCS_SR_COMM_COMPL_1098UPD

[Edit Prompts](#)
[Launch Query Manager](#) [Preview Selection Results](#)

Parameters

*Federal TIN

*Calendar Year

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

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View the external link to [Update Student TIN Request Box](#). This link will open in a new tab/window.

3. Audit and Validate 1098-T

! This is an Auditing and Validating step prior to the sending out the 1098-T's. It creates a PDF to download and is used to verify student data. You may also utilize the QCS_SF_1098T_LATEST_STATUS query to obtain similar results for student data verification.


You can Audit as many times as you want. Try to reserve Validating until you are certain the data is correct. This will alleviate the need for fixes later on.

Once you Validate, students can view their 1098-T in Student Self Service.

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

1. The 1098-T Audit Report run control ID search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_ADM_FYR_5 (Admissions Letter, Summer, FYR Admit Type).
3. The 1098-T Audit Report page displays.
4. Select the **Report Mode** drop-down and select:
 - A. **Audit Only: Recommended prior to Validating.** Used to check the data manually before printing or creating a transmittal files. You can run this process as many times as you want.
 - B. **Audit and Validate:** The 1098-T Audit Report prints all applicable records and assigns a validation status to them. Use this Report Mode when you have completed your Auditing.

- C. **Validate Only:** Checks each applicable record to determine the validity of its data. Select this to isolate those missing an SSN, name, or address in the system. Do not Validate prior to Auditing.
5. Select the **Primary Sort** drop-down and select one of the options (typically is **Postal Code**).
6. Select the **Print Selection** drop-down and select:
 - A. All 1098-T's (**recommended**): Includes all types of 1098-T records.
 - B. Not Filed Corrected 1098-T's: Includes only those records that were included in a transmittal file and have the Correction box selected.
 - C. Not Filed Original 1098-T's: Includes only those records that were **not included** in a transmittal file and **do not** have the Correction box selected.
 - D. Not Printed Corrected 1098-T's: Includes only those records that **have not** printed and have the Correct box selected.
 - E. Not Printed Originals 1098-T's: Includes only those records that **have not** printed and that **do not** have the Correction box selected.
7. Select the **Secondary Sort** drop-down and select one of the options (typically is **Last Name**).
8. In the **TIN Control Information** section, enter or search for the:
 - A. **Federal TIN.**
 - B. **Calendar Year.**
9. The **Student Override** checkbox remains unchecked for this run. When making corrections, it may be selected.
 - A. For updates/edits/corrections for *individual students*, select the **Student Override** checkbox. The **ID** field under the **Student Override** section will be enabled.
 - I. Enter the student **ID**.
 - II. Select the **Add a New Row [+]** icon to add multiple students.
10. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
11. In the **Process List** within the **Process Monitor**, select the **Actions** drop-down arrow.
12. Select the **View Log/Trace** link and the View Log/Trace page displays.
13. Select the **PDF** document.
14. Section complete.

-  Use your search function to find Failed Validation Statuses:
- **Failed Validation:** The 1098-T Form Print report does not pick up records with this validation status. If you run the 1098-T Audit report to validate your data and it determines a record to be invalid, the system assigns this validation status to the record.
 - **Reasons for Failed Validation:**
 - **Invalid Address**
 - **Invalid Name**
 - **Invalid Box Amount**
 - Navigate to the Edit 1098-T Data page to verify the Failed Validation Status.

- To correct the Failed Validation, fix the reason for the Failed Validation then re-run the Audit/Validate process utilizing the **Student Override** functionality.



If you only Audited, re-run this process again to Validate.

1098-T Audit Report

Run Control ID WAXXX_AUDIT_VALIDATE_1098_T

Report Manager Process Monitor

Run

*Report Mode

*Print Selection

*Primary Sort Postal Code

*Secondary Sort Last Name

Optional Validations

☐ Do Not Report

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

Save Notify Refresh

Add Update/Display

Report ID: SF1098VP

PeopleSoft
AUDIT AND VALIDATE 1098-T
Mode = Audit Only

Page No. 1
Run Date 10/03/2023
Run Time 15:24:42

Institution TIN: 91-0824167
Institution Name : Clark College
Institution Address: 1933 Fort Vancouver Way
Vancouver, WA 98663-3529
Institution Contact: Help Line 360/992-2287

Student SSN: 202-02-1090 TIN NOT REQUESTED
Student Name: Kennedy Adams
Student EMPLID: 202903110
Student Address:

Correction (Y/N): Y

Payments Received: 298.08
Amount Billed:
Prior Year Adjustments:
Financial Aid:
Prior Year FA Adjustments:
Future Per(Y/N): N
Half Time (Y/N): N
Graduate (Y/N): N

Student SSN: 201-00-6859 TIN NOT REQUESTED
Student Name: Drew Allen
Student EMPLID: 202109885
Student Address:

Correction (Y/N): Y

Payments Received: 932.00
Amount Billed:
Prior Year Adjustments:
Financial Aid:
Prior Year FA Adjustments:
Future Per(Y/N): Y
Half Time (Y/N): Y
Graduate (Y/N): N

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View Tutorial Via Panopto

View the external link to [Audit and Validate 1098-T](#). This link will open in a new tab/window.

4. Print 1098-T

Navigation: Student Financials > Taxes > Tax Reports > 1098-T Form Print

These processes will not actually "print" the 1098-T, but will create the file that will be sent to the Department of Enterprise Services for printing, folding, and mailing.

Each individual college will run the Print process in ctcLink. SBCTC will then pull the file that is generated and send it to the Department of Enterprise Services for printing.

Please submit a ticket to SBCTC once you have finished the print process steps in PRD.

1. The **1098-T Form Print** run control ID search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_ADM_FYR_5 (Admissions Letter, Summer, FYR Admit Type).
3. The 1098-T Print page displays.
4. In the Run Parameters section, enter or search for the:

- A. **Transmitter's TIN.**
 - B. **Calendar Year.**
 - C. **Media: Print Only.**
 - D. **Filing Status:**
 - I. **Original:** If this is the first run of the year.
 - II. **Correction:** After the first run and for any corrections.
 - E. **Primary Sort:** (typically **Postal Code**).
 - F. Enter **Secondary Sort:** (typically **Last Name**)
5. In the TIN Control Information section, enter or search for the:
 - A. **TIN.**
 - B. **Calendar Year.**
 6. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
 7. Section complete.

1098-T Print

Run Control ID
WAXXX_PRINT_1098_T
Report Manager
Process Monitor
Run

Run Parameters

*Transmitter's TIN
*Calendar Year

*Media
Print Only

Filing Status

Primary Sort
Postal Code

Secondary Sort
Last Name

Alignment Run
Test File
Prior Year Indicator

Alignment Count
Replacement Alpha Character

File Parameters

TIN Control Information

Find | View All
First
1 of 1
Last

*ID

*ID

Student Override

Find | View All
First
1 of 1
Last

Save
Notify
Refresh

Add
Update/Display

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5. Send 1098-T Transmittal File to IRS

Use the below instructions as a reference to send 1098-T transmittal files to the IRS in ctclink.

PLEASE NOTE: Extra attention should be given to the proper file being uploaded, as erroneous files take a significant amount of time to correct.

Navigation: Student Financials > Taxes > Tax Reports > 1098-T Form Print

1. The 1098-T Form Print search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_ADM_FYR_5 (Admissions Letter, Summer, FYR Admit Type).
3. The 1098-T Print page displays.
4. In the **Run Parameters** section, select or enter the:
 - A. **Transmitter's TIN.**
 - B. **Calendar Year.**
 - C. **Media: Transmittal File Only.**
 - D. **Filing Status.**
 - E. **Primary Sort:** (typically is **Postal Code**)
 - F. **Secondary Sort:** (typically is **Last Name**)
5. In the **TIN Control Information** section, search or enter the:
 - A. **TIN.**
 - B. **Calendar Year.**
6. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.

7. In the **Process List** within the **Process Monitor**, select the **Actions** drop-down arrow.
8. Select the View Log/Trace link and the View Log/Trace page displays.
9. Right click on the **IRSTAX.001** file, then choose **Save Link As** or **Save Target As** and save to your desktop or other file location.
10. Rename the file. Ensure that the renamed file is kept as a text document (.TXT file extension). The file may need to be opened by MicroSoft Notepad to view its contents.
11. Log in to the **IRS FIRE** system by selecting the following link and proceed with specified directions to upload the file.
 - [IRS FIRE System](#)
12. Process complete.

1098-T Print

Run Control ID
WAXXX_SEND_1098_T_IRS
Report Manager
Process Monitor
Run

Run Parameters

*Transmitter's TIN
*Calendar Year

*Media
Transmittal File Only
Alignment Run
Alignment Count

Filing Status
Test File
Replacement Alpha Character

Primary Sort
Postal Code
Prior Year Indicator

Secondary Sort
Last Name
File Parameters

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

* TIN
*Calendar Year
Student Override

Student Override
Find | View All
First
1 of 1
Last

*ID

Save
Notify
Refresh
Add
Update/Display

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View the external link to [Send 1098-T Transmittal file to IRS](#). This link will open in a new tab/window.