

Request Missing Student National ID (SSN) Communications

Purpose: Utilize this article to assist you with requesting TIN/missing SSN from students.

Audience: Student Records; 1098-T Staff; Student Financials Staff; Finance 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.

Use this as reference for sending out student 1098-T TIN (**T**axpayer **I**dentification **N**umber) requests. These steps assume a letter template has been created.

The following process steps describe how to send out two methods of communication for the student TIN (SS #'s) requests.

When preparing to run these processes, **BE SURE** to review the communication to determine if any dates, text, or policies have changed which should be reflected within the communication.

Below, we begin with the process of sending all students an email request and then we follow that up with a printed/mailed letter asking for their SS#'s for students with inactive/missing e-mail addresses.

To update the [Student's SSN](#), work with your Enrollment Staff.

To update a [Student's Address](#), work with your Enrollment Staff and/or refer to the [Update Address Information](#) QRG.

1. Assign the Communication to the Students - 3C Engine

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

- ZC CC 3Cs User
- ZZ CC 3Cs User

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

Navigation: Campus Community > Communications > Run 3C Engine

1. The 3C Engine 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 **3C Engine Parameters** tab displays.
4. Under the **Process 3C's** section, select the **Population Selection** checkbox.
5. Under the **Process Joint Records** section, ensure the **No Joint Processing** checkbox is selected.
6. In the **Event Selection** section, enter or search for the:
 - A. **Academic Institution**
 - B. **Administrative Function = GEN**
 - C. **Event ID = B_GBL_B03 (GBL SF Missing SSN Email)**
7. Under the **Population Selection** section:
 - A. Select the **Selection Tool** drop-down and select **PS Query**.
 - B. Search or enter the **Query Name CTC_SF_PS_3C_SSN_TIN**
 - C. Select the **Edit Prompts** hyperlink and the **Query Prompts** window displays.
 - I. Enter the **Business Unit**.
 - II. Select the **Limit - Not sent Ltr this year** checkbox.
 - III. Ensure **B03** is entered in the **Letter Checking if sent** checkbox.
 - IV. Select the **OK** button and the **3C Engine Parameters** tab displays.
8. You may select **Preview Selection Results** hyperlink to preview results.

9. Select the **Manage Duplicate Assignment** tab and the **Manage Duplicate Assignment** tab displays.
10. If you do not want this communication to go to students that have already received this communication, confirm the **Check Duplicate Communication** box is checked. It is located under the **Duplicate Communication Check** section.
 - A. Select the **Variable Data** drop-down and select **Match** if you want the duplicate communication process to only consider it a duplicate communication if the variable data matches.
 - B. Leave the **Communication Status** blank. This will prevent the assignment of duplicate letters.
11. Ensure the **Check Duplicate Checklist** checkbox is de-selected.
12. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
13. Section complete.

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 [Run 3C for Missing Student SSN](#). This link will open in a new tab/window.

2. Run Communication Generation (E-mail first)

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

- ZC CC 3Cs User
- ZD CC 3Cs User
- ZZ CC 3Cs User

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

Navigation: Campus Community > Communications > Communication Generation

14. The 3C Engine Run Control ID search page displays.
15. 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).

Selection Parameters Tab

16. The **Selection Parameters** tab displays.
17. Under the **ID Selection** section, select **Population Selection** from the **ID Selection** drop-down.
18. Under the **Population Selection** section:
 - A. Select the **Selection Tool** drop-down and choose **PS Query**.
 - B. Enter or search for the **Query Name CTC_SF_PS_COMGEN_LIMIT**
 - C. Select the **Edit Prompts** hyperlink and enter the:

- I. **Institution:** WAXXX
- II. **Limit to:** (encouraged to be a high number, ex: 5000+)
- III. **Letter Code:** B03
- IV. Select the **OK** button and the **Selection Parameters** tab displays.

19. Under the **Letter Code Selection** section:

- A. Enter or search for the **Letter Code B03**.
- B. Under the **Template Selection** section, select the **Report Name** hyperlink and the **Look Up Report Name** page displays.
 - I. Select the **CTCSFGBL_SSN** (*GBL SF missing SSN*) hyperlink and the **Selection Parameters** tab displays.

20. Under the **Communication Language Usage** section, select the **Preferred** checkbox.

21. Under the **Communication Method Usage** section, select:

- A. The **Specified** checkbox.
- B. Select the **Method** drop-down and choose **Email**.

The screenshot shows a web application interface for configuring report parameters. At the top, there are tabs for 'Selection Parameters', 'Process Parameters', 'Email Parameters', and 'Checked Parameters'. Below these are fields for 'Run Control ID' (WAXXX_MISSING_SSN_COM_GEN), 'Report Manager', 'Process Monitor', and a 'Run' button. The 'ID Selection' section has a dropdown for 'ID Selection' set to 'Population Selection'. The 'Population Selection' section includes a 'Selection Tool' dropdown set to 'PS Query', a 'Query Name' field with 'CTC_SF_PS_COMGEN_LIMIT', and buttons for 'Launch Query Manager' and 'Preview Selection Results'. The 'Letter Code Selection' section shows 'Letter Code' as 'B03' and 'GBL SF missing SSN' selected. Below this is the 'Template Selection' section, which displays 'No Matching Template Found' and two radio buttons: 'Use Default Template' (selected) and 'Do Not Produce Communication'. The 'Communication Language Usage' section has 'Preferred' selected. The 'Communication Method Usage' section has 'Specified' selected and 'Method' set to 'E-Mail'. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

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 [Missing SSN Communications \(Email\): Selection Parameters Tab](#). This link will open in a new tab/window.

Process Parameters Tab

22. Select the **Process Parameters** tab and the **Process Parameters** tab displays.
23. **Under the Usage Tables** section:
 - A. **Person Communication Usage:** These selections are connected to Name/Address Usage rules. Select the drop-down of each field and enter:
 - I. **Address: SF Email Campus, Home. Business**
 - II. **Address Name: Full Name- Pri, Prf, Leg**
 - III. **Salutation: Full Name- Pri, Prf, Leg**
 - IV. **Extra Name: Full Name- Pri, Prf, Leg**
 - V. Select the **Use Preferred Email Address** checkbox.
 - B. **Joint Salutation Usage:** Leave blank.
 - C. **Org Communication Usage:** Select the drop-down of each field and enter:
 - I. **Org Recipient: All Cntc, All Dept, All Loc.**
 - II. **Contact Name: Full Name - Pri, Prf, Leg.**
24. Under the **Communication Processing Dates** section:
 - A. Enter the **From Date** and **To Date** in the **Communication Date Range Selection** fields. These dates must cover the range from your 3C Engine Run Date.
25. Within the **Output Settings** section and under the **Missing Critical Data** section:
 - A. Ensure that the **Produce Communication** checkbox is selected.
 - B. De-select the **Complete Communication** checkbox. *(It is important to uncheck this box so students who do not have an email will be able to get a letter when re-running this process. Steps are below).*

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 [Missing SSN Communications \(Email\): Process Parameters Tab](#). This link will open in a new tab/window.

Email Parameters Tab

26. Select the **Email Parameters** tab and the **Email Parameters** tab displays.
27. Under the **Email Parameters** section, enter the:
 - A. **From:** (*Email address sending the message*).
 - B. **Subject:** (*Use a clear simple message about collecting student SS#'s*)

- **Important Note:** There will be multiple lines of the subject input because of the way the Report Definition is set up. This will not affect anything, just allows the job to run. Ensure you enter the same information in each **Subject** field.

C. **Reply to:** (Optional - Overrides the From email address above when recipient replies).

D. **Sender:** (Optional - Overrides).

E. **Bounce to:** (Email address set to receive all emails that do not send successfully).

28. Select the **Importance** level checkbox: (Optional).

29. Select the **Sensitivity** level checkbox: (Optional).

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 [Missing SSN Communications \(Email\): Email Parameters Tab](#). This link will open in a new tab/window.

Checklist Parameters Tab

30. This tab is not used and should remain blank.

Run Communication Generation and Determine Missing Critical Data

31. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
32. Select the **Actions** hyperlink under the **Actions** header within the process list. Select **Message Log** and the Message Log page displays.
33. Note the 'Not Processed' rows. See information below.
34. Section (or process) complete.

-  • If you view the last page of data, you will see that this Message Log shows how many communications were processed successfully and how many were unsuccessful. The unsuccessful records are the students who did not have an email in the system, so now we will move to the next step of sending those students a letter.
- To produce a report of emails sent by institution, date range, and letter code, you can execute the following query:
 - ***CTC_COMMUNICATION_LIST_BY_DATE***
 - When reviewing this query, please note the row labeled "Unsuccessful." If this row displays a value of "Y," the communication was not sent to the student. The row labeled **Outcome Reason** will give you a reason that the communication was not successful. The following reasons are possible on email communications
 - Missing Critical Data
 - Invalid Email Address
 - Email Send Error

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 [Run Com Gen and Check Missing Critical Data \(Email\)](#). This link will open in a new tab/window.

3. Re-Run Communication Generation (Letter)

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

- ZC CC 3Cs User
- ZD CC 3Cs User
- ZZ CC 3Cs User

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

 Only complete the following steps if you have Unsuccessful results from the email steps above or if you are only sending letters and not emails.

Navigation: Campus Community > Communications > Communication Generation

35. The 3C Engine Run Control ID search page displays.
36. 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).

Selection Parameters Tab

37. The **Selection Parameters** tab displays.

38. Under the **ID Selection** section, select **Population Selection** from the **ID Selection** drop-down.
39. Under the **Population Selection** section:
 - A. Select the **Selection Tool** drop-down and choose **PS Query**.
 - B. Enter or search for the **Query Name CTC_SF_PS_COMGEN_LIMIT**
 - C. Select the **Edit Prompts** hyperlink and enter the:
 - I. **Institution:** WAxxx
 - II. **Limit to:** (*encouraged to be a high number, ex: 5000+*)
 - III. **Letter Code:** B03
 - IV. Select the **OK** button and the **Selection Parameters** tab displays.
40. Under the **Letter Code Selection** section:
 - A. Enter or search for the **Letter Code B03**.
 - B. Under the **Template Selection** section, select the **Report Name** hyperlink and the **Look Up Report Name** page displays.
 - I. Select the **CTCSFGBLSSNL** (*GBL SF missing SSN Letter*) hyperlink and the **Selection Parameters** tab displays.
41. Under the **Communication Language Usage** section, select the **Preferred** checkbox.
42. Under the **Communication Method Usage** section, select:
 - A. The **Specified** checkbox.
 - B. Select the **Method** drop-down and choose **Letter**.

The screenshot displays the 'Selection Parameters' configuration page. At the top, there are tabs for 'Selection Parameters', 'Process Parameters', 'Email Parameters', and 'Checklist Parameters'. The 'Run Control ID' is 'WXXXX_MISSING_SSN_COM_GEN_LTR'. Below this, the 'ID Selection' section has a dropdown menu set to 'Population Selection'. The 'Population Selection' section shows 'Selection Tool' as 'PS Query' and 'Query Name' as 'CTC_SF_PS_COMGEN_LIMIT'. The 'Letter Code Selection' section shows 'Letter Code' as 'B03' and 'GBL SF missing SSN'. Under 'Template Selection', there is a 'Report Name' field and a 'Template List' table. The table has columns for 'Template ID', 'Description', 'Language', 'Method', and 'Default Template'. Below the table, there are radio buttons for 'Use Default Template' (selected) and 'Do Not Produce Communication'. The 'Communication Language Usage' section has radio buttons for 'Specified' (selected) and 'Preferred', and a 'Language' dropdown. The 'Communication Method Usage' section has radio buttons for 'Specified' (selected) and 'Preferred', and a 'Method' dropdown set to 'Letter'. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

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 [Missing SSN Communications \(Letter\): Selection Parameters Tab](#). This link will open in a new tab/window.

Process Parameters Tab

43. Select the **Process Parameters** tab and the **Process Parameters** tab displays.
44. **Under the Usage Tables** section:
 - A. **Person Communication Usage:** These selections are connected to Name/Address Usage rules. Select the drop-down of each field and enter:
 - I. **Address: SF Paper Check Mailing**
 - II. **Address Name: Full Name- Pri, Prf, Leg**
 - III. **Salutation: Full Name- Pri, Prf, Leg**
 - IV. **Extra Name: Full Name- Pri, Prf, Leg**
 - V. Select the **Use Preferred Email Address** checkbox.
 - B. **Joint Salutation Usage:** Leave blank.
 - C. **Org Communication Usage:** Select the drop-down of each field and enter:
 - I. **Org Recipient: All Cntc, All Dept, All Loc.**
 - II. **Contact Name: Full Name - Pri, Prf, Leg.**
45. Under the **Communication Processing Dates** section:
 - A. Enter the **From Date** and **To Date** in the **Communication Date Range Selection** fields. These dates must cover the range from your 3C Engine Run Date.
46. Within the **Output Settings** section and under the **Missing Critical Data** section:
 - A. Select the **Send to File** checkbox.
 - I. In the File Path field, enter the following file path:
 - a. **/CSTRANSFER/WA***/SFCollections/**
 - (asterisks (***) = your school code)
 - This file path is CASE SENSITIVE and must be exactly as listed above!
 - B. Ensure that the **Produce Communication** checkbox is selected.

- C. De-select the **Complete Communication** checkbox. (It is important to uncheck this box so students who do not have an email will be able to get a letter when re-running this process. Steps are below).

The screenshot shows the 'Process Parameters' tab of a web application. At the top, there are tabs for 'Selection Parameters', 'Process Parameters', 'Email Parameters', and 'Checklist Parameters'. Below these, there is a 'Run Control ID' field with the value 'WA300_MISSING_SSN_COM_GEN_LTR' and a 'Run' button. The main content area is divided into several sections: 'Usage Tables' (with sub-sections for 'Person Communication Usage', 'Joint Salutation Usage', and 'Org Communication Usage'), 'Communication Processing Dates' (with 'Communication Date Range Selection' and 'Update Communication Generation Date With'), and 'Output Settings' (with 'Sort Option' set to 'Country, Postal' and 'Send to File' checked). At the bottom, there is a 'Missing Critical Data' section with 'Produce Communication' checked and 'Complete Communication' unchecked. Navigation buttons 'Save', 'Notify', 'Add', and 'Update/Display' are located at the bottom of the form.

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 [Missing SSN Communications \(Letter\): Process Parameters Tab](#). This link will open in a new tab/window.

Email Parameters Tab

47. This tab is not used and should remain blank.

Checklist Parameters Tab

48. This tab is not used and should remain blank.

Run Communication Generation and Copy File Path

49. Select the **Run** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
50. Select the **Actions** hyperlink under the **Actions** header within the process list. Select **Message Log** and the Message Log page displays.
51. Scroll through and find the **URL** within the *Message Log* where the letter output was sent (it's usually towards the end of the list.) Copy just the portion of the URL that is beyond the '*SFCollections*' notation within the URL. This copied portion of the URL is what will be used to download the file. The following image contains a highlighted example.

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 [Run Com Gen and Copy File Path \(Letter\)](#). This link will open in a new tab/window.

Download PDF File

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

- ZZ SF Collections
- ZZ Upload Doc ADM
- ZZ Upload Doc ADV
- ZZ Upload Doc SR

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

Navigation: PeopleTools > CTC Custom > Extensions > Upload/Download Files

52. The **File Upload/Download** search page displays.
53. Enter the:
 - A. **Academic Institution.**
 - B. **Functional Area: Student Financials**
 - C. **Business Process Name: SF Collections**
54. Select the **Search** button.
55. The Upload Files tab displays.
56. Select the **Download Files** tab.
57. The **Download Files** page displays.
58. Enter the url file name copied out of the message log from the Com Gen process into the File Name field.
59. Select the **Download File** button.
60. Process complete.

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 [Download Missing SSN Communication Letter](#). This link will open in a new tab/window.

Optional: Verify Message Receipt

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

- ZC CC 3Cs User
- ZD CC 3Cs User
- ZZ CC 3Cs User

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

 Individual communications can be viewed on the Communication Management page. It will display as shown in the image below except with the parameters and dates specified, based on what was entered in the steps above.

Navigation: Campus Community > Communications > Person Communications > Communication Management

1. The Communication Management search page displays.
2. Enter the **ID** number and select the **Search** button.
3. Select the link to the **BGGB03** communication that was generated from this process. The Person Communication tab displays.
4. Under the **Communication Outcome** section, select the **View Generated Communication** hyperlink and the View Communication page displays.
5. Select the **View** button.
6. Process complete.

Person Communication | Communication Recipient Data

Francis Nidless ID 202181072

Communication Assignment

Assign DateTime: 11/30/2023 3:40:15PM

*Function: GEN General

*Institution: Bellingham Technical College

Communication Key:

*Category: B080EN Student Financials General

*Context: B08B03 GBL SF missing SSN

*Method: E Email

*Direction: Outgoing Communication

Letter Code: B03 GBL SF missing SSN Include Enclosures

Communication Process Details

Communication Date: 11/30/2023 Begin Time: End Time:

Comments: Print Comment

Communication ID:

Department:

Create Joint Communications

Checklist Association

Sequence
Item Sequence

Communication Outcome

Communication Generation Date: 12/01/2023

Communication Completed Date Activity Completed: 12/01/2023

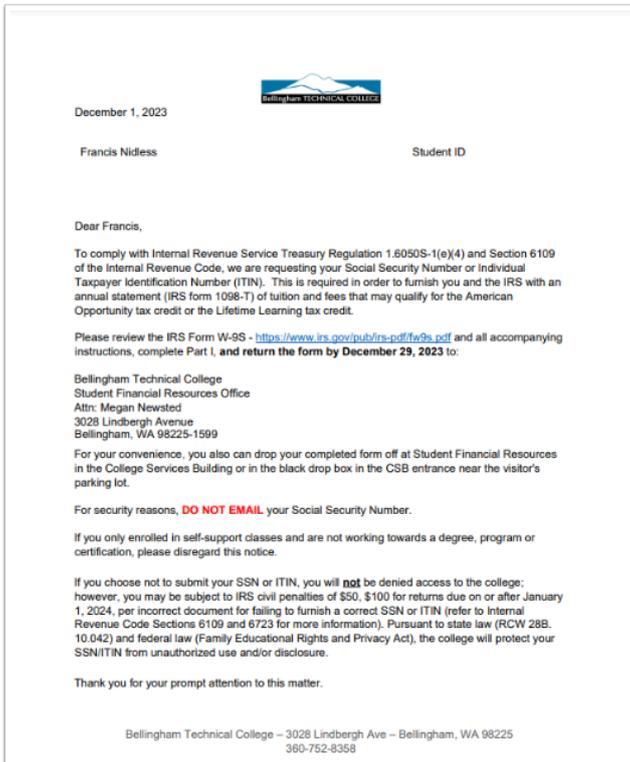
Unsuccessful Outcome Outcome Reason:

Language Used: (Invalid Value)

Method Used: Letter

Process Used: Communication Generation Process Instance: 141174001

Person Communication | Communication Recipient Data



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 [View Missing SSN Communication for Student](#). This link will open in a new tab/window.