

1098-T Guide

Purpose: Use this checklist as a guideline for 1098T preparations for Student Financials in ctclink.

Audience: Student Financials staff


1098-T Guide

Task Name	Description	QRG	Suggested Timeline
1098-T TIN Table Setup	<p>Verify your 1098-T TIN Table information is correct for the current calendar year. If you have not copied over the TIN for the upcoming calendar, please do so.</p> <ol style="list-style-type: none">1. 1098-T Institution Address2. Address Usage3. Name Usage4. Contact Name5. Contact Phone6. Template Definition7. 1098-T Citizenship <p>Prerequisite: Image Update notification from SBCTC to update the Template Definition field.</p>	<ul style="list-style-type: none">• Copy/Update 1098-T Table/Template	October through December
Verify Item Type 1098-T Box 1/ Box 5 Configuration	<p>Verify Item Types are flagged as 1098-T eligible.</p> <p>Use queries:</p> <ul style="list-style-type: none">• QCS_SF_1098T_ITEM_TYPE_CHRG• QCS_SF_INBOX5_1098SETUP <p><i>You do not need to verify previously audited Item Types. Only new Item Types need to be audited.</i></p> <p>Prerequisite: None</p>	<ul style="list-style-type: none">• 1098-T Item Type Configuration Verification	October through December, depending on how often new item types are created
Student Communications	<p>Communicate to students to do the following in their self-service:</p>	<ul style="list-style-type: none">• View/Consent 1098-T	Once per term or year

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	<ol style="list-style-type: none"> Grant electronic consent for electronic 1098-T Update their mailing address, if needed. Ensure the required staff/ department have sent out the missing SSN/TIN letters. <ul style="list-style-type: none"> <i>The update TIN request process looks at the communications table to see if it has been set to completed.</i> <p>Prerequisite: None</p>	<ul style="list-style-type: none"> 9.2 Update Addresses Request Missing Student National ID (SSN) Communications 	
Verify FIRE Account Access	<p>Review your FIRE account with the IRS.</p> <p>Prerequisite: None</p>	<ul style="list-style-type: none"> https://fire.irs.gov/ Set Up and Test Fire Account with the IRS 	<p>Test transmittal files may be sent until the end November.</p> <p>Filing Information Returns Electronically</p> <p>Production transmittal file is due by the end of March.</p>
1098-T Processing	<ol style="list-style-type: none"> Generate Update Audit/Validate Print: <ol style="list-style-type: none"> The college runs the Print process in ctcLink. SBCTC pulls the file and sends it to the Department of Enterprise Services for printing. Send <p>Please do not run the Validation process until you are ready for students to receive their 1098-Ts.</p>	<ul style="list-style-type: none"> 1098-T Processing 	January

Task Name	Description	QRG	Suggested Timeline
	Pre-req: Item Type Reconciliation, TIN Table Setup, SSN/TIN Student Communications*, Verify FIRE Account		

Printable Guide

 Have this optional 1098-T Guide handy (printed or downloaded) so you can refer back to it and pick up where you left off.



[1098-T Guide.pdf](#)