1098-T Consent Communication

> **Purpose**: Use this document as a guide for generating communications to students for electronic consent to their 1098-T.
>
> **Audience**: Student Financials staff.

1. Run 3C Engine

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. In the **Process 3C's** section, select the **Population Selection** check-box and the **Event** and **Population Selection** sections appear.
5. In the **Process Joint Records** section, select the **No Join Processing** check-box.
6. In the **Event Selection** section, enter or search for the:
   A. **Academic Institution.**
   B. **Administration Function: GEN.**
   C. **Event ID: B_GBL_B0E.**

7. In the **Population Selection** section:
   A. Click the **Selection Tool** drop-down and select **PS Query**.
   B. In the **Query Name** field, enter or search for **QCS_SF_PS_1098T_CONSENT**. The **Edit Prompts** hyperlink appears.
   C. Select the **Edit Prompts** hyperlink and the **Query Prompts** box displays.
      I. Enter or search for the **Business Unit**.
      II. Select the **OK** button and the Parameters tab displays.

   D. Select the **Preview Selection Results** hyperlink to ensure you have students populating.

8. Select the **Manage Duplicate Assignment** tab.
9. In the **Duplicate Communication Check** section, de-select the **Check Duplicate Communication** check-box.

10. In the **Duplicate Checklist Check** section, leave the **Check Duplicate Checklist** check-box selected.
11. Select the **Run** Button. Please refer to the [Process Schedule Request](#) steps for further instructions.
12. 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 1098-T Consent Communication](#). This link will open in a new tab/window.

2. Communication Generation

Navigation: Campus Community > Communications > Communication Generation

1. The Communication Generation 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).

2.1. Selection Parameters Tab

3. The Communication Generation Selection Parameters tab displays.
4. In the **ID Selection** section, click the **ID Selection** drop-down and select **Population Selection**. The **Population Selection** section appears.
5. In the **Population Selection** section:

A. Click the **Selection Tool** drop-down and select **PS Query**.
B. In the **Query Name** field, enter or search for **CTC_SF_PS_COMGEN_LIMIT**. The **Edit Prompts** hyperlink appears.
C. Select the **Edit Prompts** hyperlink and the **Query Prompts** box displays.
  I. Enter the **Institution**.
  II. Enter the **Limit to** field: (encouraged to be a high number, ex. 5000)
  III. Enter or search for the **Letter Code: B0E.**
  IV. Select the **OK** button and the **Selection Parameters** page displays.

D. Select the **Preview Selection Results** hyperlink to ensure you have students populating.

6. In the **Letter Code Selection** section, enter or search for the **Letter Code B0E.**
   A. In the **Template Selection** section, select the **Report Name** hyperlink and the **Look Up Report Name** page displays.
      I. Select the **Report Name** hyperlink for your institution and the **Selection Parameters** tab displays.

7. In the **Communication Language Usage** section, select the **Specified Language**.
8. In the **Communication Method Usage**, select the **Method** of communication.
   A. **E-Mail**: Your college will be emailing this communication to the students. This is currently the only option configured.

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2.2. Process Parameters Tab

9. Select the **Process Parameters** tab.
10. The Process Parameters tab displays.
11. **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.**

> ℹ️ Usage selection for address is connected to the method being sent. For example: If the communication method is Email, an Email usage like Student Email should be selected.

12. Under the **Communication Processing Dates** section:
    A. **Communication Date Range Selection:**
        I.   **From Date: Current Date.** *(Should be the date that the Run 3C step was completed)*
        II. **To Date: 01/01/2500.**

B. **Update Communication Generation Date With: System Date** (default).
C. **Update Communication Completion Date With: System Date** (default).

13. Under the **Missing Critical Data** section:
    A. Select the **Produce Communication** check box (default).
    B. Uncheck the **Complete Communication** check box.

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View the external link to 1098-T Com Gen Process Parameters Tab. This link will open in a new tab/window.

2.3. Email Parameters Tab

14. Select the **Email Parameters** tab and the **Email Parameters** tab displays.
15. Use only when the Communication Method Usage selected on the Selection Parameters tab is Email.
    A. **From:** Enter the email address of the person or entity that is sending the email. (e.g. example@tacomacc.edu).
    B. **Subject:** Email topic.
    C. **Reply to:** If the student clicks Reply, this is the email address that will receive the response email.
    D. **Sender:** Enter the email address of the person or entity that is sending the email. (e.g. example@tacomacc.edu).
    E. **Bounce to:** If the email is undeliverable, this is the email address that will receive the email.
    F. In the **Importance** and **Sensitivity** group boxes, select the appropriate options.

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View the external link to [1098-T Com Gen Email Parameters Tab](#). This link will open in a new tab/window.

2.4. Checklist Parameters Tab

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

2.5. Run the Com Gen

17. Select the **Run** button.
18. The Process Scheduler Request page displays next.
19. Select the **SCC_COMMGEN** process and then select the OK button.
20. Please refer to the [Process Schedule Request](#) steps for further instructions.