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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8 SP1 Student Financials

Changes and Updates to PeopleSoft Student Financials

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Changes and Updates to PeopleSoft Student Financials

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PeopleSoft 8 SP1 Student Financials Documentation Updates for SA Bundle #15

Note. This document is an update to the *PeopleSoft Enterprise 8 SP1 Student Financials PeopleBook*. It describes the Product Update ID #613410 that was posted to Customer Connection in August 2006. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with SA Bundle #15. Specifically, it discusses changes in:

- Setting up 1098-T tax form production
- Production and filing of 1098-T tax forms

See Also

PeopleSoft Enterprise 8 SP1 Student Financials PeopleBook, "Setting Up Tax Form Production," Setting Up 1098-T Tax Form Production

PeopleSoft Enterprise 8 SP1 Student Financials PeopleBook, "Producing Tax Forms and Receipt Information," Producing and Filing 1098-T Tax Forms

Setting Up 1098-T Tax Form Production

This section discusses changes related to how to set up 1098-T tax form production.

Pages Used to Set Up 1098-T Tax Form Production

Page Name	Object Name	Navigation	Usage
1098-T	SF_1098_INST	Manage Student Financials, Manage Tax Reporting, Setup, 1098-T TIN Table	Set up a TIN.
Citizenship Statuses	SF_1098_INST_CIT	Manage Student Financials, Manage Tax Reporting, Setup, 1098-T TIN Table, Citizenship Statuses	Enter citizenship statuses.

Setting Up a TIN

Access the 1098-T TIN Table page.

1098-T TIN Table
Citizenship Statuses

Federal TIN: 751234567 **Calendar Year:** 2006

***Description:** [1098-T Institution Address](#)

***Address Usage:** Billing,Mail,Home,Perm

***Name Usage:** Primary Full

***Contact Name:**

***Contact Phone:**

***Name Control:** **Transmission Code:** Last Filing Year Reporting Method Change

1098-T Reporting Indicator

Amounts Billed

Payments Received

Business Unit Detail View All First 1 of 1 Last

	*Business Unit	*Institution	FinAid Group	Third Party Group
1	<input type="text" value="GLAKE"/> <input type="button" value="Q"/> Glake Bursar	<input type="text" value="GLAKE"/> <input type="button" value="Q"/>	<input type="text" value="GRANTS"/> <input type="button" value="Q"/>	<input type="button" value="Q"/> <input type="button" value="+"/> <input type="button" value="-"/>

1098-T TIN Table page

The **Reporting Method Change** checkbox is added. Select this checkbox if you change your method of reporting payments received or amounts billed from the prior year.

Setting Up Citizenship Statuses

Access the Citizenship Statuses page.

1098-T TIN Table
Citizenship Statuses

Federal TIN: 951223331 **Calendar Year:** 2002

***Citizenship Status** Native

***Citizenship Status** Naturalized

***Citizenship Status** Alien Permanent

Valid Citizenship Statuses View All First 1-3 of 3 Last

	*Citizenship Status	Description	
1	<input type="text" value="1"/> <input type="button" value="Q"/>	Native	<input type="button" value="+"/> <input type="button" value="-"/>
2	<input type="text" value="2"/> <input type="button" value="Q"/>	Naturalized	<input type="button" value="+"/> <input type="button" value="-"/>
3	<input type="text" value="3"/> <input type="button" value="Q"/>	Alien Permanent	<input type="button" value="+"/> <input type="button" value="-"/>

Citizenship Statuses page

Enter valid Citizenship statuses so that a 1098-T is produced for only the statuses listed.

Producing and Filing 1098-T Tax Forms

This section discusses changes related to how to produce and file 1098-T tax forms.

Pages Used to Produce and File 1098-T Tax Forms

Page Name	Object Name	Navigation	Usage
1098-T Data	SF_1098_DTL	Manage Student Financials, Manage Tax Reporting, Inquire, 1098-T Inquiry Manage Student Financials, Manage Tax Reporting, Use, 1098-T Data	View 1098-T data by student. Manually make changes to a student's 1098-T data.

Reviewing and Overriding 1098-T Data

Access the 1098-T Data page.

1098-T Data

ID: SFTX00001 **Abbatista, Aaron Edward** **Federal TIN:** 951223331 **Calendar Year:** 2006

1098-T Status View All First ◀ 1 of 2 ▶ Last

Seq. Nbr. 2 Overridden Printed File Created
 Correction **Correction Type:** ***Validation Status:** Pending Validation

Date Created: 08/10/06 12:22:57PM Override Data **Date Updated:** 08/10/06 12:22:57PM

Student 1098-T Data

SSN: 001-02-0001 **(1) Payments Received:** **(5) Financial Aid:**
First Name: Aaron **(2) Amount Billed:** 4128.00 **(6) Prior Year FA Adj:**
Middle Name: Edward **(3) Reporting Method Change** **(7) Includes Future Period**
Last Name: Abbatista **(4) Prior Year Adj:** **(8) Half Time**
[Student Address](#) **(9) Graduate**

1098-T Detail Items View All First ◀ 1-4 of 4 ▶ Last

Box #	Item Amount	Business Unit	Item Type	Account Type	Item Term	Description	Actual Billing Date	Date Posted	Payment Date
1 002	1032.00	PSUNV	100000000007	TUT	0560	Graduate School Tuition	08/08/2006	08/08/2006	
2 002	1032.00	PSUNV	100000000007	TUT	0560	Graduate School Tuition	08/08/2006	08/08/2006	
3 002	1032.00	PSUNV	100000000007	TUT	0570	Graduate School Tuition	08/08/2006	08/08/2006	
4 002	1032.00	PSUNV	100000000007	TUT	0570	Graduate School Tuition	08/08/2006	08/08/2006	

1098-T Data page

After generating 1098-T data, you may review and override the data.

Student 1098-T Data

The fields in the Student 1098-T Data group box have been re-numbered to be consistent with the actual 1098-T form. The number in parentheses preceding each field indicates the corresponding box on the 1098-T.

(1) Payments Received Displays the value that prints in Box 1 on 1098-T forms.

(2) Amount Billed Displays the value that prints in Box 2 on 1098-T forms.

(3) Reporting Method Change	<p>Displays the value that prints in Box 3 on 1098-T forms.</p> <p>The system selects this check box if you have changed your reporting method.</p>
(4) Prior Year Adj (prior year adjustment)	<p>Displays the value that prints in Box 4 on 1098-T forms.</p> <p>Indicates adjustments made for a prior year.</p>
(5) Financial Aid	<p>Displays the value that prints in Box 5 on 1098-T forms.</p> <p>Indicates receipt of scholarships or grants.</p>
(6) Prior Year FA Adj (prior year financial aid adjustment)	<p>Displays the value that prints in Box 6 on 1098-T forms.</p> <p>Indicates adjustments to scholarships or grants for a prior year.</p>
(7) Includes Future Period	<p>Displays the value that prints in Box 7 on 1098-T forms.</p> <p>The system selects this check box during the Generate 1098-T process if any of the amounts reported in Boxes 1 or 2 (Payments Received or Amount Billed) were related to an academic period that begins in January through March of the following year.</p>
(8) Half Time	<p>Displays the value that prints in Box 8 on 1098-T forms.</p> <p>The system selects this check box during the Generate 1098-T process if the student's academic load was at least half-time during any term within the tax-reporting year.</p>
(9) Graduate	<p>Displays the value that prints in Box 9 on 1098-T forms.</p> <p>The system selects this check box during the Generate 1098-T process if the student was enrolled as a graduate student during any term within the tax-reporting year.</p>

Note. The inquiry version of this page displays the same information as the 1098-T Data page. However, no Override Data button appears on the inquiry page so you cannot edit any of the displayed information.