

Oracle's PeopleSoft 8SP1 Student Financials Changes and Updates for SA Bundle #20

August 2007

Changes and Updates for CS Bundle #20

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PeopleSoft Student Financials Documentation Updates for CS Bundle #20

Note. This document is an update to the *PeopleSoft Enterprise Student Financials 8 SP1 PeopleBook*. It describes the Product Update ID # 682697 that was posted to Customer Connection in August 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document provides information related to updates and fixes delivered with CS Bundle #4. Specifically, it provides information about Producing and Filing 1098-T forms.

See Also

PeopleSoft Enterprise 8 SP1 Student Financial PeopleBook, "Producing Tax Forms and Receipt Information". Producing and Filing 1098-T Tax Forms, Generating 1098-T Data.

Producing and Filing 1098-T Forms

This section discusses changes related to producing and filing 1098-T tax forms page.

Page Used to Generate 1098-T Data

Page Name	Object Name	Navigation	Usage
Generate 1098-T	RUNCTL_SF_SFP1098P	Manage Student Financials, Manage Tax Reporting, Process, Generate 1098-T	Generate 1098-T data.

Generating 1098-T Data

Access the Generate 1098-T page.

Generate 1098-T

Run Control ID: PSUNV_TAXES

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

Run

Control Information			View All	First	1 of 1	Last	
'Federal TIN:	951223331	'Calendar Year:	2007	<input type="checkbox"/> Student Override			+ -
Bypass Validation Edits							
<input type="checkbox"/> Citizenship	<input checked="" type="checkbox"/> Academic Credit	<input type="checkbox"/> Financial Aid	<input type="checkbox"/> Financial Info				
Student Override			View All	First	1 of 1	Last	
'ID	National ID	Force 1098-T					
1		<input type="checkbox"/>	+ -				

Generate 1098-T page

On the Generate 1098-T Run Control page, the **Bypass Validation Edits** group box has been added.

Citizen Select to bypass the Citizenship edit, so all students with eligible charges will have a 1098-T produced regardless of citizenship status.

Academic Credit Select to bypass the Earned Academic Credit edit, so all students with eligible charges will have a 1098-T produced, even if they are enrolled in classes that earn no academic credit.

Financial Aid Select to bypass the Financial Aid edit, so students who have eligible charges paid entirely by Financial Aid will have a 1098-T produced.

Financial Info Select to enable students who have no financial information in boxes one through six to have a 1098-T produced. The 1098-T is produced as long as students are currently enrolled.

Note: Each edit bypass works independently which means institutions may choose one, all or none of the edit bypasses.