

2011 Desktop Settings for Functional Users (Note - Screen shots are from previous year)

Desktop Recommendation (Borrower Entity)

1. 1098T
2. 1098E (only if your campus loaded this type of document)
3. Emails: (resend from here, click on System ID (33). Under Administrative Options, click Resend Email
4. Documents: View PDF copy of the document. Mark as viewed if you printed the document for the student/borrower.
5. Borrower Information: shows last person/campus/borrower to update the record.
6. Not shown: if you have access to more than one campus, open University Associations.

Borrower									
Administrative Options		Data Views			Shortcuts				
System ID 210000834543	Full Name SUSIE SAMPLE Date Of Birth	SSN XXX - XX - 7900 Borrower ID 210000834543							
Menu 1098Ts ▼ ▲ ✕									
System ID	University Campus	Name	Category	Modified By	Last Modified				
130000026700	SAMPLE UNIVERSITY: MAIN (000169)	Form 1098T 2009	Form 1098T 2009	lvertal	1/10/2010 5:18:32 PM				
Menu 1098Es ▼ ▲ ✕									
System ID	University Campus	Name	Category	Modified By	Last Modified				
Menu Emails ▼ ▲ ✕									
System ID	Email	Task	Date Sent	University	Entity	Created By	Date Created	Status	
330003058427 (View)	gmd1098@hotmail.com	Document; Document Available; Email	1/10/2010 5:18:32 PM	SAMPLE UNIVERSITY (000169)	130000026700	310003585567	1/10/2010 5:18:32 PM	Sent	
Menu Documents ▼ ▲ ✕									
System ID	University Campus	Name	Extension	Category	Print Date	Modified By	Last Modified	Viewed	
310003585567 (View)	SAMPLE UNIVERSITY: MAIN (000169)	SAMPLE UNIVERSITY Form 1098T 2009	.pdf	Form 1098T 2009		lvertal	1/10/2010 5:18:32 PM		
Menu Borrower Information ▼ ▲ ✕									
System ID	210000834543								
SSN	XXX - XX - 7900								
ITIN									
Borrower ID No.	210000834543								
Prefix									
First Name	SUSIE								
Middle Name									
Last Name	SAMPLE								
Suffix									
Gender									
Created By	lvertal								
Date Created	1/6/2009 3:00:26 PM								
Modified By	lvertal								
Last Modified	1/10/2010 5:43:05 PM								

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Desktop Recommendation (1098T Entity)

Click on the 1098T System ID when the Borrower Entity is “yellow” to drill down to this level.

1. Documents
2. 1098T Information
3. To edit the 1098T (which updates document), choose Edit from Administrative Options.

Borrower	Administrative Options	Data Views	Shortcuts					
System ID 210000834543	Full Name SUSIE SAMPLE Date Of Birth	SSN XXX - XX - 7900 Borrower ID 210000834543						
1098T	Administrative Options	Data Views	Shortcuts					
System ID 130000026700	University Campus SAMPLE UNIVERSITY: MAIN (000169)	Category Form 1098T 2009	Description SAMPLE UNIVERSITY Form 1098T 2009 Modified By lvertal Last Modified 1/10/2010 5:18:32 PM					
Menu Documents								
System ID	University Campus	Name	Extension	Category	Print Date	Modified By	Last Modified	Viewed
310003885567 (View)	SAMPLE UNIVERSITY: MAIN (000169)	SAMPLE UNIVERSITY Form 1098T 2009	.pdf	Form 1098T 2009		lvertal	1/10/2010 5:18:32 PM	
1098T Information								
System ID	130000026700							
University Campus	SAMPLE UNIVERSITY: MAIN (000169)							
Name	Form 1098T 2009							
Description	SAMPLE UNIVERSITY Form 1098T 2009							
Category	Form 1098T 2009							
Certificate	8772DE121602479B8A9A2DA2E3D7F66F							
Tax Identification Number	XXX - XX - 7900							
Name Prefix								
First Name	SUSIE							
Middle Name								
Last Name	SAMPLE							
Name Suffix								
Address Line 1	PO BOX 932							
Address Line 2								
Address Line 3								
Address Line 4								
City	BROOKFIELD							
State	VA							
Zip	53089							
Zip+4								
Country								
Province								
Foreign Postal Code								
Email Address	gmd1098@hotmail.com							
Account Number	210000834543							
Field 1								
Field 2	\$5,000.00							
Field 3	No							
Field 4								
Field 5								
Field 6								
Field 7	No							
Field 8	Yes							
Field 9	No							
Field 10								
Corrected	No							
Client ID								
Created By	lvertal							
Date Created	1/10/2010 5:18:32 PM							
Modified By	lvertal							
Last Modified	1/10/2010 5:18:32 PM							

2011 Desktop Settings for Functional Users

(Note - Screen shots are from previous year)

Desktop Recommendation (1098E Entity)

Click on the 1098E System ID when the Borrower Entity is “yellow” to drill down to this level.

1. Documents
2. 1098T Information
3. To edit the 1098E (which updates document), choose Edit from Administrative Options.

Borrower	Administrative Options	Data Views	Shortcuts					
System ID 210000834543	Full Name SUSIE SAMPLE Date Of Birth	SSN XXX - XX - 7900 Borrower ID 872151						
1098E	Administrative Options	Data Views	Shortcuts					
System ID 120000467980	University Campus SAMPLE UNIVERSITY: MAIN (000169)	Category Form 1098E 2009	Description SAMPLE UNIVERSITY Form 1098E 2009 Modified By susiesample Last Modified 1/10/2010 6:20:57 PM					
Menu Documents								
System ID	University Campus	Name	Extension	Category	Print Date	Modified By	Last Modified	Viewed
310003585574 View	SAMPLE UNIVERSITY: MAIN (000169)	SAMPLE UNIVERSITY Form 1098E 2009	.pdf	Form 1098E 2009		susiesample	1/10/2010 6:20:57 PM	
1098E Information								
System ID	120000467980							
University Campus	SAMPLE UNIVERSITY: MAIN (000169)							
Name	Form 1098E 2009							
Description	SAMPLE UNIVERSITY Form 1098E 2009							
Category	Form 1098E 2009							
Certificate	68CA7C509CB542AFBF6AEDE703179A7D							
Tax Identification Number	XXX - XX - 7900							
Name Prefix								
First Name	SUSIE							
Middle Name								
Last Name	SAMPLE							
Name Suffix								
Address Line 1	PO BOX 932							
Address Line 2								
Address Line 3								
Address Line 4								
City								
State								
Zip								
Zip+4								
Country								
Province								
Foreign Postal Code								
Email Address	gmd1098@hotmail.com							
Account Number	872151							
Field 1	\$250.00							
Field 2	No							
Corrected	No							
Client ID								
Created By	susiesample							
Date Created	1/10/2010 6:20:57 PM							
Modified By	susiesample							
Last Modified	1/10/2010 6:20:57 PM							

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Find It Fast

1. Update Borrower/Student Demographics

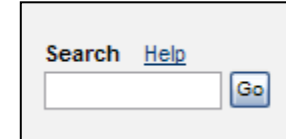
- Open 1098T or 1098E entity
- Administrative Options
- Edit
- Make Changes
- Check Send Email box if applicable
- Submit

2. Update Data on 1098T or 1098E

- Open 1098T or 1098E entity
- Administrative Options
- Edit
- Make Changes
- Check Correction box if applicable
- Check Send Email box if applicable
- Submit

3. Search for Borrower/Student

- Click [Help](#) for a complete list of search strings, for example.
 - Last Name
 - BID=xxxx (this is the campus account that was uploaded)
 - Document ID (begins with 31)
 - SSN



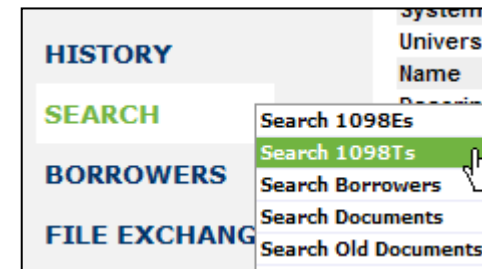
Hint: If the “name” search does not result in any matches, try using the Search 1098T or 1098E feature

4. Search for 1098T or 1098E

- Enter one or more data variables to search for the borrower/student.
- Click the System ID to navigate to the specific borrower

5. Can Not Locate Borrower/Student

- Log on using the UW System Administration View Only user ID
- Repeat Search Steps
- Contact UW System or UAS to make the necessary University Associations.



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Create and Update Record Basics

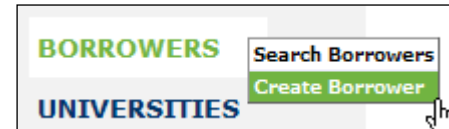
1. Create New Borrower/Student/Document

•Add Borrower:

- Search for the borrower/student to confirm they don't exist on your campus.

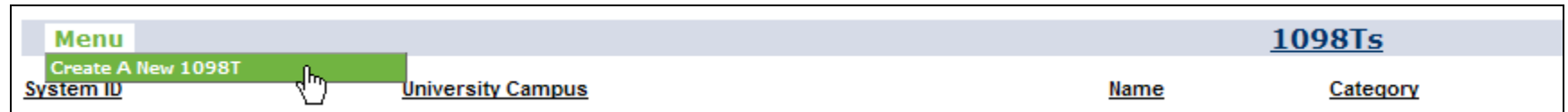
Hint: search using View Only UW System Administration user id. You may just need a University Association.

- Borrowers menu
- Create Borrower
- Complete form, click Submit



•Add Document:

- Open 1098T or 1098E Entity from Borrower Data Views menu list
- Click Create New 1098 from the entity Menu



•Complete the Form and Click Submit

Hint: Remember to check Send Email box to push certificate email to the borrower/student.

2. Email Never Sent

•Open 1098T or 1098E Entity

- Administrative Options
- Edit
- Enter email Address and any other changes
- Check Send email
- Submit

Hint: The borrower/student will receive a corrected email notice...not the original email text.

3. Email Sent Not Received

•Click on email System ID from the Email Entity.

- Administrative Options
- Edit email Address if applicable
- Click Resend email.

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4. Document Printed Local for Borrower/Student (Administrative Role)

- Click on the Document ID •Administrative Options •Mark Document as Viewed

5. Enter a Memo

- Borrower Entity •Memo Data View •Memo Menu •Create a New Memo •Enter Memo, click Submit

Borrower	Administrative Options	Data Views	Shortcuts
System ID 210000834543	Full Name SUSIE SAMPLE Date Of Birth	SSN XXX - XX - 7900 Borrower ID 872151	
Menu		Memos	
<ul style="list-style-type: none"> <li style="background-color: #92d050; padding: 2px;">Create A New Memo <li style="padding: 2px;">Export Flat File <li style="padding: 2px;">Export XML 	University Campus	<u>Description</u>	<u>Preview</u>

6. Upload a Document for Future Reference (any type document or image file)

- Borrower Entity •Document Data View •Create a New Document •Complete required fields
- Browse to the document •Submit

Menu		Documents	
<ul style="list-style-type: none"> <li style="background-color: #92d050; padding: 2px;">Create A New Document <li style="padding: 2px;">Generate A Document From Template 	University Campus	<u>Name</u>	<u>Extension</u>
310003585574 (View)	SAMPLE UNIVERSITY: MAIN (000169)	SAMPLE UNIVERSITY Form 1098E 2009	.pdf
310003585567 (View)	SAMPLE UNIVERSITY: MAIN (000169)	SAMPLE UNIVERSITY Form 1098T 2009	.pdf