

Instructions: Printing a 1098T Information Statement Using MS Access

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There are two options for printing 1098T information statements from MS Access:

- Print all statements for students extracted in BM1745J (all balances including \$0 qualified amounts).
- OR
- Print statements for only those students whose summarized qualified amounts are greater than zero (all balances excluding \$0 qualified amounts).

There is a "theme" to the Queries and Reports in the IRS_1098T database. Select and remain with either the **ALL** theme or the **NON ZERO** theme.

Notes: A new report, 1098T Information Statement (by SID), and a new query, Query 3 (by SID), have been added to **IRS_1098T.mdb**.

A report for printing labels is also available. See [Printing Labels](#).

1098T Information Statements

1. Run [DataExpress report BM1745RE](#) from the INFORM group/PLIB account catalog.

Special Note: At the Output File Format Options menu, select option #24 Dbase dbf format.

2. Once the data has been extracted, you will be prompted:

DOWNLOAD/SAVE/APPEND file (D/s/a)?

Press return to accept the Download default.

3. At the PC FILE NAME prompt, type the file path and filename.

The filename must be BM1745, for example, **C:\BM1745.dbf**

4. Once the download has completed, minimize your Minisoft or Reflections window and open Microsoft Access. It is best to minimize at this point, as opposed to exiting out, so that you can reuse the extract if necessary instead of rerunning the BM1745RE DataExpress.
5. Now open or maximize the Access IRS_1098T database. (If you have not yet downloaded the database, do so now by clicking [IRS_1098T.mdb](#).)

A IRS_1098T database window will appear on your screen. There will be several tabs at the top of the window (TABLES, QUERIES, FORMS, REPORTS, MACROS, MODULES).

6. If using Access 2010, go to the EXTERNAL DATA tab, choose MORE > “dBase file – Import or link to a dBase file” from the dropdown menu.

You are now going to import the BM1745 extract as an Access table.

7. You should now see an IMPORT window. This is where you locate the BM1745 download from DataExpress.
 - Select the source and destination of the data – you can either type in the file path you saved the file to or use the browse feature
 - Once the file path is entered, choose “Import source data into a new table in the current database” and click OK.
 - Once the file has been successfully imported, click Close.

You will now be back at the IRS_1098T database window and BM1745 should appear as an available table.

8. Click the QUERIES tab.
9. To run one of the queries (non-zero balances, all balances or by individual SID), double-click on it.
10. When the query has run, a spreadsheet of your data will appear on your screen.

Click the X button in the top right corner of the spreadsheet query window to accept the data and close the spreadsheet.

11. From the IRS_1098T database window, select the REPORTS tab.
12. Click the Report entitled 1098T Information Statement (2 – All).
Click the Preview button. Your data is displayed in the format that will print on the statements.
 - Click the printer icon to print;
OR
 - Click the drop-down File menu followed by Print. Note that this will print all reports.
13. To print one statement, double-click the Report entitled 1098T Information Statement (by SID).
Enter the SID, and click the OK button. A report for that student appears.

- Click the printer icon to print;
OR
- Click the drop-down File menu followed by Print.

Printing Labels

The statements are intended to be used with window envelopes. However, if you wish to print labels instead, follow the directions below.

Note: Print labels after you have run your statements.

1. Click on the QUERIES tab of the IRS_1098T database window
2. If you ran the 1098T Information Statement (2-All) report, click Labels – All Query.

If you ran the 1098T Information Statement (1-Non Zero) report, click the Labels – non zero Query.

3. To run the query, double-click on it.
4. When the query has run, a spreadsheet of your data will appear on your screen. Click the X button in the top right corner of the spreadsheet query window to accept the data and close the spreadsheet.
5. Click the REPORTS tab of the IRS_1098T database window.
6. With the REPORTS tab accessed (in the IRS_1098T database):
 - If you ran the 1098T Information Statement (2–All) report, click Labels (all balances).
 - If you ran the 1098T Information Statement (1-Non Zero) report, click Labels (non- zero balances).

7. Click the Preview button.

8. To print the labels either:
 - Click the printer icon to print.
OR
 - Click the drop-down File menu followed by Print.