

2022 1098-T Events Timeline

The following schedule identifies key target dates for the 2022 tax season. In order to ensure that your 1098-T documents are processed in a compliant and timely manner, please be sure to follow the schedule identified below.

1098-T Event Timeline		
Date	Event	Event Details
Friday, September 9, 2022	Student Electronic Opt-In Solicitation email template	ECSI will provide all new and returning TaxSelect 1098-T clients with the Student Electronic Opt-In Solicitation email template. This email should be sent to all students encouraging them to opt-in to receive 1098-T statements electronically. Students who have opted-in to receive statements electronically will receive a notification from ECSI with instructions on how to access statements online within 24 hours of the client approving the 1098-T data. <i>Note: TouchNet clients utilizing the TouchNet Managed Service should disregard the Student Electronic Opt-In Solicitation email template. TouchNet clients will use the TouchNet Consent Manager instead.</i>
Monday, Oct. 24, 2022 to Friday, Dec. 16, 2022	Test Period	ECSI will open the 1098-T data file testing period. During this time, clients may provide ECSI with a 1098-T test data file and ECSI will process the file and post the results online. <i>Clients are encouraged to only send a test file if the data file layout has changed from previous years.</i>
Friday, Dec 30, 2022	Deletion of Test Data	All test data will be deleted and the production period will begin.
Tuesday, Jan 3, 2023 to Monday, Jan 16, 2023	1098-T Production Period Begins	The 1098-T data file production period will begin. During this time, clients must provide a 1098-T production data file. Clients are encouraged to provide production data as soon as possible.
Friday, Jan 20, 2023	Cutoff Date for 1098-T Production Files	ECSI requires that all processed 1098-T production files be reviewed and approved by this date.

		<p>Please note that if your file is not reviewed and approved by this date, ECSI cannot guarantee that your statements will be printed and mailed by the IRS deadline.</p> <p><u>If approval is not received by this date, an additional rush fee of up to \$1,000.00 will be assessed to your account.</u></p>
Tuesday, Jan 31, 2023	IRS Deadline for Mailed Forms	All forms must be postmarked no later than Monday, Jan 31, 2023.
Wednesday, Feb 1, 2023	Correction Period Opens	<p>ECSI will open the 1098-T correction period. During this time, clients can create or edit 1098-T statements online using the "Create/Edit Tax Documents" feature. All statements created/edited during this period will be automatically submitted to the IRS as part of the original submittal by Mar 31, 2023.</p> <p><i>There is no need to contact ECSI when a correction is made online.</i></p>
Wednesday, Feb 1, 2023 to Tuesday, Feb 28, 2023	1098-T Invoice Period	ECSI will distribute the TaxSelect 1098-T Invoice to clients.
Friday, Mar 17, 2023	File Correction Period Closes	The time period to submit a correction/addition file prior to the IRS submittal will be closed.
Friday, Mar 24, 2023	Deadline for Manual Adjustments and Corrections	Manual adjustments and corrections to 1098-T forms online must be completed by 5:00 pm Eastern Time. Access to the edit function of the 1098-T website will be closed at this time.
Wednesday, Mar 31, 2023	End of Submittal Period for 1098-T Statement Date to IRS	ECSI will submit the 1098-T statement data to the IRS on March 29, 2023 to meet this deadline.
Saturday, Apr 1, 2023	Reopen 1098-T Website	Access to the edit function of the 1098-T portion of our website will be reopened.
Saturday, Apr 1, 2023 to Monday, Jul 31, 2023	Submission of New and Corrected 1098-T Data to IRS	<p>ECSI will submit all new and corrected 2022 1098-T data to the IRS once a month. There is no need to contact ECSI when a correction is made online.</p> <p><i>IRS penalties may be applicable to all new and corrected 1098-T data submitted to the IRS after the original filing deadline of Mar 31, 2023.</i></p>

Tuesday, Aug 1, 2023	End of Submission of New and Corrected 1098-T Data to IRS	ECSI will not automatically submit new or corrected 2022 1098-T data to the IRS. Clients are required to contact the IRS directly to provide detail on why the 1098-T statement data is being reported after the filing deadline. The IRS will provide guidance on how to submit the new and/or corrected data. <i>IRS penalties may be applicable to all new and corrected 1098-T data submitted to the IRS after the original filing deadline of Mar 31, 2023.</i>
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