2023 Processing Guide Official Mode

Once you have verified that the data in the IRS DATA file tsr1098\_XXXXXX.dat is correct and you feel that you are ready to send your final file to ECSI, follow the steps below to complete the process.

**Remember that once you run in OFFICIAL Mode, you will not be able to run the processes in test mode again. So be sure that you are ready!!!**

1. **Run GLBDATA for CREDIT\_STUDENTS\_SINCE (if your college uses this pop sel, not all do)**
2. **Run TSP1098 IN OFFICIAL MODE – See attachment for parameter options**
3. **Run GLBDATA for 1098T\_SEND\_TO\_ECSI (If your college excludes non-resident aliens and/or excludes students with GRSH > PYRE) OR 1098T\_SEND\_TO\_ECSI\_ALL (if your college is sending to all students).**
4. **Run TSR1098 IN OFFICIAL MODE – See attachment for parameter options**
5. **Get your 1098T count from the tsr1098 log file**
6. **Using your BANNER SFTP software program (or whatever steps your college uses to download files from banner), SFTP the tsr1098\_XXXXXX.dat(where XXXXXX is your job number from banner) down to your PC (I put mine down to the desktop)**
7. **Once on your desktop/PC, open the file and make sure that the total at the bottom matches the total from your log file in step 5**
8. **Rename the file by right clicking on the file and choosing rename. The name should be 20231098T. DO NOT PUT SPACES OR ANY SPECIAL CHARACTERS IN THE FILE NAME! This could cause your file to not process.**
9. **Upload your file to ECSI using the EasyPath Client Portal. Instructions for doing this are located in the 1098-T EasyPath Client Portal FINAL.pdf document.**