Lessons Learned from 2022

Go over TSR1098 and the importance of parameter 05 being entered correctly when running in official mode.

Go over what the options for parameter 05 mean on TSR1098 and why everyone will either have a 2 or 4 there and NEVER a 1.

Talk about the exclude status and how that will not come into play if you use pop sels. So if you are not trying to exclude NRA and RA then it might be better to not use a pop sel and let those run through depending on how many NRA/RAs you have and then using parameter 05 in TSR1098 to exclude people with 0s and/or BOX 5 > Box 1 without using a pop sel. So that might be an option and this will allow the system to put excluded as a status so they cannot see a 1098T if they are not eligible. Nora @ Southeastern brought this to my attention.