



DEFAULT FORMS SETTINGS

1. BRIEF DESCRIPTION

- This document contains details about the "Default Form Fields" feature provided by *IRSLOGICS* to the admin user .
- This feature enables the admin user to set certain default values for forms 2848/8821 for all his licensed users.

2. DEFAULT FORMS SETTINGS

- The "Default Form Fields" feature can be accessed by an admin user under the administration button / Forms as shown below.
- This feature will be available to only tax resolution clients
- This feature is divided into three parts namely "*2848 fields*", "*8821 fields*" and "*2848/8821 common fields*".
- The menu option will help the admin user to add default values to certain fields of 2848 and 8821 forms. Anytime a user creates a new case and uses either or both of 2848 and 8821 forms these values will come auto populated in the form.
- These values can be edited by the user also after auto population according to specific needs of the case analyst.

The screenshot shows the 'CTR QA' application interface. The left navigation menu includes 'CTR Main', 'Dashboard', 'Calendar', 'Cases', 'ALL CASES', 'CLIENTS', 'CSS YES', 'My Cases', 'test1', and 'Tasks and Events'. The 'Administration' section is expanded, showing 'Forms' highlighted. The main content area is titled 'Form Fields' and contains a 'Default Form Fields' section with a red box around it. Below this is a 'Default values' table with the following data:

Field Name	Default Value	Edit	Delete
Specific Tax Matters 1	'test1'		
Appointee Name 1	'Rob Kitson'		
Specific Tax Matters 2	'test2'		
Specific Tax Matters 3	'test3'		
Appointee Name 2	'Azem Quereshi'		
Appointee Name 3	'Shannon Stoffe...'		
Business Specific Tax Matters 1	'test4'		
Business Specific Tax Matters 2	'test5'		
Business Specific Tax Matters 3	'test6'		
Business Appointee Name 1	'Daniel Serrano'		
Business Appointee Name 2	'AAA Filter User'		
Business Appointee Name 3	'AAA Filter User'		

Figure1

3. 2848 Fields

- There are two types of forms that are covered under this section namely 2848 default/Spouse and 2848 business forms.
- The user can set up to 12 representative names for both default and business 2848 forms using the add default field button as explained as STEP1 and STEP2 in figures below .
- The admin can edit, delete or add these default values as per his convenience anytime in the application as explained in STEP3.
- An example 2848 form mapping of default values is shown below in STEP4.

STEP1 => Click on the add default field













































Field Name	Default Value	Edit	Delete
Representative Name 1	'Terri Turner c/o ...		
Representative Name 2	'James Sharmat...		
Representative Name 4	'Nahed Najmyar...		
Representative Name 5	'Gevork Oganes...		
Representative Name 6	'Joseph Cole c/o...		
Representative Name 7	'Roxana Sadegh...		
Business Representative Name 1	'Terri Turner c/o ...		
Business Representative Name 2	'James Sharmat...		
Business Representative Name 4	'Nahed Najmyar...		
Business Representative Name 5	'Gevork Oganes...		
Business Representative Name 6	'Joseph Cole c/o...		
Business Representative Name 7	'Roxana Sadegh...		
Representative Name 8	'Annie Arakelian...		
Business Representative Name 8	'Annie Arakelian...		
Representative Name 3	'Ryan McFarlan...		
Business Representative Name 3	'Ryan McFarlan...		
Representative Name 9	'Sarin Neshania...		
Business Representative Name 9	'Sarin Neshania...		
Representative Name 10	'Shamim Akhav...		
Business Representative Name 10	'Shamim Akhav...		
Representative Name 11	'Jiyun Seo c/o U...		
Business Representative Name 11	'Jiyun Seo c/o U...		

STEP2 => select field from dropdown and add default value

Field Name:

- Representative Name 1
- Representative Name 2
- Representative Name 3
- Representative Name 4
- Representative Name 5
- Representative Name 6
- Representative Name 7
- Representative Name 8
- Representative Name 9
- Representative Name 10
- Representative Name 11
- Representative Name 12
- Business Representative Name 1
- Business Representative Name 2

STEP3=>edit or delete values

Form Fields	Default values	
Custom Form Details	Add Default Field For more default 2848 fields please refer 2848/8821 common fields HELP	
<ul style="list-style-type: none"> Custom Forms Default Form Fields <ul style="list-style-type: none"> 2848 Fields 8821 Fields 2848/8821 Common Fields 	Field Name	Default Value
	Representative Name 1	'Terri Turner c/o ...  
	Representative Name 2	'James Sharmat...  
	Representative Name 4	'Nahed Najmyar...  
	Representative Name 5	'Gevork Oganess...  
	Representative Name 6	'Joseph Cole c/o...  
	Representative Name 7	'Roxana Sadegh...  
	Business Representative Name 1	'Terri Turner c/o ...  
	Business Representative Name 2	'James Sharmat...  
	Business Representative Name 4	'Nahed Najmyar...  
	Business Representative Name 5	'Gevork Oganess...  
	Business Representative Name 6	'Joseph Cole c/o...  
	Business Representative Name 7	'Roxana Sadegh...  
	Representative Name 8	'Annie Arakelian...  
	Business Representative Name 8	'Annie Arakelian...  
	Representative Name 3	'Ryan McFarlan...  
	Business Representative Name 3	'Ryan McFarlan...  
	Representative Name 9	'Sarin Neshania...  
	Business Representative Name 9	'Sarin Neshania...  
	Representative Name 10	'Shamim Akhav...  
	Business Representative Name 10	'Shamim Akhav...  
	Representative Name 11	'Jiyun Seo c/o U...  
	Business Representative Name 11	'Jiyun Seo c/o U...  

STEP4 =>Mapping

Type: **Prospect** Status: **[Returned]** - * Fake Probability: **Low**

Profile Interview Billing **Forms** Documents Services Tasks & Events

Form: 2848 **Power of Attorney and Declaration of Representative**

City: _____ State: _____ Zip: _____

Representative(s)

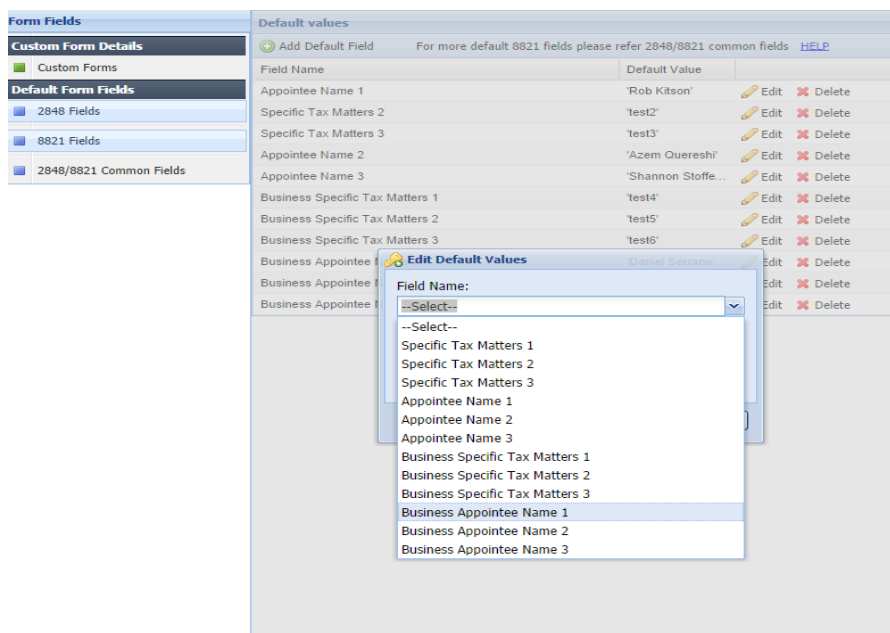
Rep #1: Terri Turner c/o U <input checked="" type="checkbox"/> send notices	Rep #2: James Sharmat c/ <input type="checkbox"/> send notices	Rep #3: Ryan McFarland c/ <input type="checkbox"/> send notices
Rep #4: Nahed Najmyar c/ <input type="checkbox"/> send notices	Rep #5: Gevork Oganessya <input type="checkbox"/> send notices	Rep #6: Joseph Cole c/o U <input type="checkbox"/> send notices
Rep #7: Roxana Sadeghi c/ <input type="checkbox"/> send notices	Rep #8: Annie Arakelian c/ <input type="checkbox"/> send notices	Rep #9: Sarin Neshanian c/ <input type="checkbox"/> send notices
Rep #10: Shamim Akhavan <input type="checkbox"/> send notices	Rep #11: Jiyun Seo c/o US <input type="checkbox"/> send notices	Rep #12: _____ <input type="checkbox"/> send notices

Matters

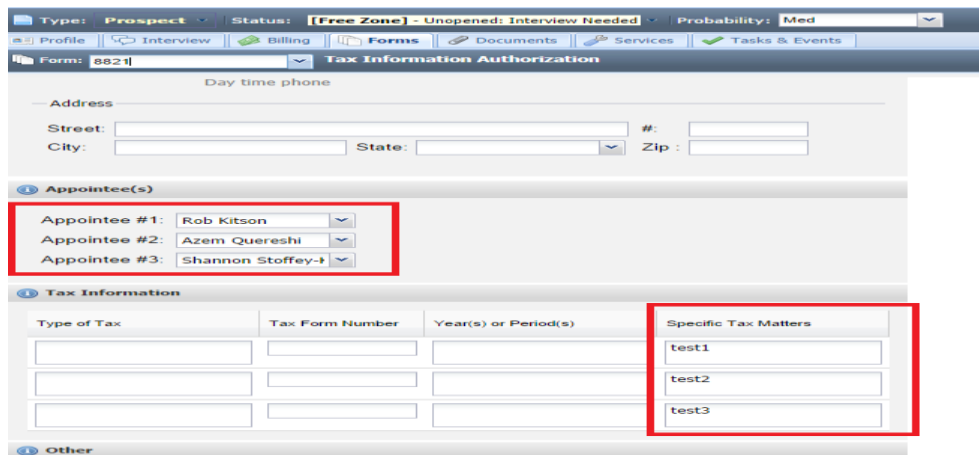
4. 8821 Fields

- There are two types of forms that are covered under this section namely 8821 default/Spouse and 8821 business forms.
- The user can set up to 3 appointee names and 3 specific tax fields for both default and business 8821 forms using the add default field button as explained as STEP1.
- The admin can edit ,delete or add these default values as per his convenience anytime in the application similarly as for 2848 explained above.
- An example 8821 form mapping of default values is shown below in STEP2.

STEP1 => Fields



STEP2 => Mapping



5. 2848/8821 Common Fields

- There are 4 types of forms that are covered under this section namely 8821 and 2848 default/Spouse and 8821and 2848 business forms.
- As 2848 and 8821 forms are similarly linked hence the user can set tax form number ,year of periods and tax description matters (which is named as type of tax in 8821 form) for both 2848/8821 simultaneously only.
- The user can set up to 3 "tax form numbers" , 3 "years of periods" and 3 "tax description" fields for 4 forms , default and business 8821and 2848 forms.
- The admin can edit ,delete or add these default values as per his convenience anytime in the application similarly as for 2848 explained above.
- An example of interlinking mapping of 8821and 2848 form fields is shown below in STEP1.

STEP1 = > interlinked default value mapping

The screenshot displays two side-by-side application windows. The left window, titled 'Form: 2848 Power of Attorney and Declaration of Representative', features a 'Matters' section with a table:

Description of Matter	Tax Form Number	Year(s) or Period(s)
test1	TEST4	11
test2	TEST5	21
test3	TEST6	31

The right window, titled 'Form: 8821 Tax Information Authorization', features a 'Tax Information' section with a table:

Type of Tax	Tax Form Number	Year(s) or Period(s)	Specific Tax Matters
test1	TEST4	11	
test2	TEST5	21	
test3	TEST6	31	

The mapping shows that 'test1' in the left window corresponds to 'test1' in the right window, with the same 'TEST4' form number and '11' year/period value.