



MANUAL TRANSMITTAL

Department of the Treasury
Internal Revenue Service

7.15.8

JULY 31, 2025

EFFECTIVE DATE

(07-31-2025)

PURPOSE

- (1) This transmits revised IRM 7.15.8, Employee Plans TEDS User Manual, Tax Exempt Determination System (TEDS) Routing Slip Features.

MATERIAL CHANGES

- (1) Updated IRM 7.15.8.1.6 to change the name from Acronyms to Terms and Acronyms.
- (2) Added IRM 7.15.8.1(5), Primary Stakeholders.
- (3) Added IRM 7.15.8.1.3, Roles and Responsibilities.
- (4) Added IRM 7.15.8.1.4, Program Management and Review.
- (5) Added IRM 7.15.8.1.5, Program Controls.
- (6) Updated IRM 7.15.8.1.6 to include Office of Associate Chief Counsel (Employee Benefits, Exempt Organizations and Employment Taxes) (EEE), Information Tab (Info.) and Rulings and Agreements (R&A).
- (7) Added IRM 7.15.8.1.7, Related Resources.
- (8) Made editorial edits throughout the IRM for clarity.

EFFECT ON OTHER DOCUMENTS

This supersedes IRM 7.15.8 dated November 23, 2021.

AUDIENCE

Tax Exempt Government Entities TE/GEEmployee Plans Personnel

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7.15.8

Tax Exempt Determinations Systems (TEDS) Routing Slip Features

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7.15.8.1
(11-23-2021)
Program Scope and Objectives

- (1) **Purpose:** This IRM provides guidance to Employee Plans (EP) Determinations employees on the use and purpose of the routing slip in the Tax Exempt Determination System (TEDS). The material in this IRM comes from the Tax Exempt Determinations System (TEDS) Student Guide. The screenshots are taken directly from TEDS. The routing slip feature in TEDS allows a user to share a case with one or more users for review without transferring or otherwise changing the case ownership.
- (2) **Audience:** The determination application processing procedures in this manual are for employees in Employee Plans (EP) who work in TEDS.
- (3) **Policy Owner:** Director, EP.
- (4) **Program Owner:** EP.
- (5) **Primary Stakeholders:**
 - a. Internal - Director, Employee Plans; Director, Employee Plans Rulings and Agreements; EP Tax Law Specialists and Agents; Actuaries; Associate Chief Counsel (EEE), TE/GE Division.
 - b. External - Plan sponsors, plan representatives, and plan participants.

7.15.8.1.1
(11-23-2021)
Background

- (1) Tax Exempt Determination System (TEDS) is a web-based information system that provides an electronic case and inventory management system that Tax Exempt and Government Entities (TE/GE) Determinations business units use to manage cases.
- (2) TEDS was launched as a pilot in 2003, and from that time on, with a few exceptions, the EP Determination applications have been processed using this electronic system. EP Determination applications are uploaded to TEDS and, using on-screen capabilities, specialists review and process cases in TEDS.

7.15.8.1.2
(11-23-2021)
Authority

- (1) Delegation Order 7-1, under IRM 1.2.2.8.1, states the Director, Employee Plans has authority to issue favorable DLs on the qualified status of:
 - Pension, profit-sharing, stock bonus, annuity, and employee stock ownership plans under IRC 401, IRC 403(a), IRC 409, IRC 4975(e)(7).
 - The status for exemption of any related trusts or custodial accounts under IRC 501(a).
- (2) Find a complete list of delegation orders governing EP Rulings and Agreements at *Delegation Orders and Policy Statements by Process*.

7.15.8.1.3
(07-31-2025)
Roles and Responsibilities

- (1) The mission of Employee Plans is to provide EP's customers top-quality service by helping them understand and comply with applicable tax laws and to protect the public interest by applying the tax laws with integrity and fairness to all.
- (2) The Director, EP, reports to the Deputy Commissioner, TE/GE, and is responsible for planning, managing, directing and executing nationwide EP activities.
- (3) EP responsibilities include:

- a. Employee plans (including the qualification of pension, annuity, profit-sharing, and stock bonus plans, simplified employee pensions, saving incentive match plans for employees, and tax-sheltered annuities) and related trusts.
 - b. Tax treatment of participants and their beneficiaries and deductions for employer contributions.
 - c. Procedural and administrative provisions with respect to such plans.
- (4) The Director, EP R&A, reports to the Director, EP, and is responsible for three types of services for retirement plans - voluntary compliance, determination letters, and technical guidance.
- (5) Responsibilities of the EP R&A staff include:
 - a. Processing determination letter requests from employers regarding the qualified status of their pension, annuity, profit sharing and stock bonus plans.
 - b. Issuing opinion and advisory letters to specific requestors regarding pre-approved pension, annuity, and profit-sharing plans, including individual retirement accounts, simplified employee pensions and savings incentive match plans for employees, and tax-sheltered annuities.
 - c. Developing and operating voluntary correction programs, such as the Employee Plans Compliance Resolution System (EPCRS) program and issuing compliance statements or entering into closing agreements under these programs.
 - d. Processing requests for changes in funding method and making other actuarial determinations and interpretations.
 - e. Coordinating with Chief Counsel on requests for funding waivers.
 - f. Developing and maintaining responsibility for actuarial publications and other standards for the valuation of transfers of future interests for income, estate and gift tax purposes.
 - g. Coordinating with TE/GE Division Counsel, Associate Chief Counsel and the DOJ on litigation issues and declaratory judgment cases under the Internal Revenue Code. (IRC 7476).

7.15.8.1.4
(07-31-2025)
**Program Management
and Review**

- (1) Program reports:
 - a. The EP Determinations program uses Business Objects to view, create, and modify inventory and employee records. Business Objects uses tools to provide a built-in interface to query and analyze data and to build reports.
 - b. Monthly reports detailing the current inventory of cases by area and their status are produced and provided to the Director, EP R&A, Area Managers, and frontline managers.
 - c. Ad-hoc reports are produced as requested by determinations personnel with appropriate permission.
 - d. Each quarter, EP Determinations Quality Assurance issues reports to summarize the results of their TEQMS reviews. See IRM 7.11.3, Tax Exempt Quality Measurement System (TEQMS).
- (2) Program effectiveness:
 - a. EP Determinations monitors business unit progress toward completing and closing cases in inventory. They provide status and progress reports

Tax Exempt Determinations Systems (TEDS) Routing Slip Features 7.15.8

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to IRS leadership on a regular, recurring basis. Effectiveness is measured by analysis of compliance trends and results.

7.15.8.1.5 (07-31-2025) Program Controls

- (1) The IRS receives EP determination letter applications and user fees from taxpayers on Pay.gov.
- (2) The user fee information is then transferred to LINUS to ensure it is properly recorded.
- (3) The application information from Pay.gov is transferred to Tax Exempt Determination System (TEDS) and EP/EO Determination System (EDS), which are the systems that EP Determinations uses to control their inventory.
- (4) TEDS contains roles and permissions to ensure proper separation of duties. See IRM 7.15.4.
- (5) The EP Determinations Area Managers coordinate the assignment of inventory.
- (6) In order to ensure a consistent level of managerial engagement in the process of making key strategic decisions during a determination letter review, the specialist submits requests for approval by their manager through TEDS.
- (7) The manager approves or rejects any request through TEDS.
- (8) EP Determinations QA reviewers perform reviews on mandatory review cases and for cases selected for the Tax Exempt Quality Measurement System (TEQMS) to ensure that specialists are conducting their determination letter reviews per technical, procedural and administrative requirements. See IRM 7.11.3 and IRM 7.11.9 for more information.
- (9) The IRS is fully committed to protecting the privacy rights of taxpayers and employees. Privacy laws are included in the IRC, the Privacy Act of 1974, the Freedom of Information Act, and IRS policies and practices. For more information about these laws, visit the *FOIA Library/ Internal Revenue Service*.
 - a. For questions about privacy, email **Privacy*.
 - b. For questions about disclosure, email **Disclosure*.

7.15.8.1.6 (11-23-2021) Terms and Acronyms

- (1) The table lists commonly used acronyms and their definitions.

Acronym	Term
DL	Determination Letter
EEE	Office of Associate Chief Counsel (Employee Benefits, Exempt Organizations and Employment Taxes)
EP	Employee Plans
Info.	Information Tab
R&A	Rulings and Agreements

Acronym	Term
TE/GE	Tax Exempt and Government Entities
TEDS	Tax Exempt Determination System

7.15.8.1.7
(07-31-2025)

Related Resources

- (1) IRM 7.11.1.5 *Computer Systems*
- (2) IRM 7.11.1.5.2 *Tax Exempt Determination System (TEDS)*

7.15.8.2
(07-19-2013)

Routing Slip Features

- (1) A routing slip:
 - Gives a link to the case folder.
 - Gives the recipient (routee) the ability to read the entire case file including non-disclosable items.
 - Allows the routee to create a case chronology entry or import a document into the file.
- (2) EP Determinations employees can use the routing slip to refer a case to:
 - An on-the-job instructor.
 - A peer reviewer.
 - An actuary.
- (3) Using the routing slip characteristics:
 - The originator/case owner (router) or routee can attach a document to the routing slip.
 - Router/routees receive Inbox notifications of routing slip status.
 - Users can make comments.
 - Case owners can terminate a routing slip at any time.
- (4) Using the routing slip, a router can:
 - Route a case to a single user.
 - Route a case to several users in a predetermined order.
 - Route multiple routing slips simultaneously on the same case.
- (5) A router can only create a routing slip on a case assigned to them.

7.15.8.3
(07-19-2013)

Creating A Routing Slip

- (1) The router can create a routing slip in TEDS by following these steps:
 - Open the case that is to be routed.
 - Select **File**.
 - Click **New Routing Slip** from the drop-down menu.
- (2) See Exhibit 7.15.8-1, **Create Routing Slip**.

7.15.8.3.1
(07-19-2013)

Routing Slip Information Tab

- (1) On the routing slip **Info**. Tab, a router can change the default subject line using up to 50 characters. The router can also enter a description of up to 300 alphanumeric characters in the description box.

- (2) The **Info.** Tab Description box is used by the router for their comments when first creating the routing slip.
- (3) The comment tab (within the Info. Tab) is used by the routee for comments. The router may also add comments in this tab.
- (4) The router or routee may attach or remove additional documents from the routing slip. Imported document(s) are in the working folder.
- (5) The router should NOT select **Finish** until all desired information has been entered on all tabs (including routee).
- (6) See Exhibit 7.15.8-2, **Routing Slip Information Tab**.

7.15.8.3.2 (07-19-2013) **Routing Slip Attachments Tab**

- (1) After all information is entered on the **Info.** tab, the router can attach additional documents.
- (2) To attach one or more documents to the routing slip:
 - Click the **Attachments** tab and click **Add** to attach a document.
 - Click **Import** on the left pane to attach a document from the user's computer. This will bring up the Import screen. The importing procedures are described in IRM 7.15.6, Navigating the Tax Exempt Determination System (TEDS).
 - Click **OK**.

Note: See Exhibit 7.15.8-3, **Attachments Tab - Adding an Attachment** and Exhibit 7.15.8-4, **Import to Add Attachment**.
- (3) To remove attached documents, click on the box next to the attachment and click **Remove**. See Exhibit 7.15.8-5, **Attachment Tab - Removing an Attachment**.
- (4) After selecting recipients and you're ready to send the routing slip, select **Finish**.

7.15.8.3.3 (07-19-2013) **Users Tab (Router Only)**

- (1) The users tab allows the router to choose the routee(s) and to send the routing slip to users in a specific order. Only the router's routing slip will contain a users tab.
- (2) To select routee(s):
 - Select the routee(s) by highlighting the correct name and clicking on the arrows to add or remove names from the Selected Users box.
 - Click **Finish** to send routing slip or **Cancel** to abort the action.

Note: See Exhibit 7.15.8-6, **Select Recipients (Routees)**.

7.15.8.4 (07-19-2013) **Accessing the Routing Slip**

- (1) TEDS sends a message to the routee's Inbox. See Exhibit 7.15.8-7, **Routee's Inbox Notification**.
- (2) The sent copy of the routing slip includes a link to the case. The "Routing Slip Notification" icon (check mark ✓) indicates an action is required. The "red flag" icon indicates a simple notification.

- (3) To access the routing slip:
 - Click **Review Routing Slip** notification in the Inbox. See Exhibit 7.15.8-8, **Reviewing the Routing Slip**.
 - Right-click on the **Routing Slip Line** with the case number on the opened notification or highlight **Routing Slip Line** and click **File** on the TEDS toolbar menu.
 - Select **Edit** from the options in the dialogue box.
 - The routing slip will open. Click **Link to Case Folder**.
 - TEDS opens the case folder in a new window. See Exhibit 7.15.8-9, **Routee's View of the Routing Slip**.
- (4) Each routee can review all the case folders and the routing slip attachments. Routees can't make changes to the case data but may add/delete documents attached to the routing slip. The routee can also create a case chronology entry and input time on the case.
- (5) Each routee can view, add or delete attachments to the routing slip.
 - View any attachments to the routing slip in the Routing Slip **Attachments Tab**.
 - Click the **Attachment Link** to view the attachment or view the attachment in the working folder.
 - Note that if you remove documents from the **Attachments Tab**, they will remain in the working folder.

Note: See Exhibit 7.15.8-10, **Attachments Tab (Routee's View)**.

7.15.8.5
(07-19-2013)
Completing a Routing Slip (Routee)

- (1) Each routee of a routing slip can enter comments before completing the routing slip, on the **Comments** tab. Previous comment entries are shown on the **Comments** tab.
- (2) After the routee has completed the review, added or deleted the desired attachments, and entered any comments, the routing slip is ready to be completed.
 - a. From the open Inbox notification, click **Review Complete**.
 - b. Click **OK** to finish or **Cancel** to abort on the verification screen.
- (3) TEDs sends a message to the router's Inbox when the routee has completed the review.
- (4) If the case was routed to more than one routee, the completed slip will inform the router the routee has completed the review and the case has been routed to the next routee.
- (5) The below exhibits contain example screenshots of the routing slip completion process:
 - Exhibit 7.15.8-11, **Routee Comments Tab**.
 - Exhibit 7.15.8-12, **Completing the Routing Slip**.
 - Exhibit 7.15.8-13, **Notification of Completed Review - Router's Inbox**.
 - Exhibit 7.15.8-14, **Completing Routing Slip - Routee**.

7.15.8.6
(07-19-2013)
Tracking Routing Slip Progress

- (1) You may review a routing slip's progress through the Case History folder or the router's Inbox notifications.
- (2) The Case History folder displays all case actions including those related to the routing slip. Entries are listed in chronological order regardless of action taken.
- (3) Exhibit 7.15.8-15, **Case History Folder**, shows a screenshot of routing slip entries listed in case action order. In this example, the case history has multiple pages.

7.15.8.7
(07-19-2013)
Inbox Notification Progress Tab

- (1) You can track an open routing slip's progress through Inbox notifications. The Progress tab on the Inbox message gives a status update on the routing slip.
- (2) To view the Progress tab information, open the Inbox notification message and click the **Progress** tab at the top of the message.
- (3) Exhibit 7.15.8-16., **Inbox Notification - Progress Tab** shows a screenshot of completed and upcoming actions.

Caution: Don't click Review Complete unless the routing slip is finished. Use Close to return to Inbox.

7.15.8.8
(07-19-2013)
Open vs. Closed Routing Slip

- (1) The routing slip indicator is located on the General Case Information Tab on the case Properties Info. screen at the bottom of the page.
- (2) The indicator shows case routing slips' open or closed status.
- (3) An open routing slip and its attachments are located in the Working folder. When a routing slip has been closed or terminated, it automatically moves to the Non-Disclosable folder. However, you must move the routing slip attachments in the Working folder manually to the appropriate folder before case closing because attachments don't move automatically with the closed routing slip. Once you close the routing slip and it's in the Non-Disclosable folder, it can't be moved to the Purge folder.
- (4) An open routing slip will prevent a case from being transferred or updated to status 74PC OR 57.
- (5) See Exhibit 7.15.8-17, **Case Information - General Case Info. Tab**.

7.15.8.9
(07-19-2013)
Terminating - Routing Slip

- (1) The router's manager or router may terminate a routing slip at any time.
- (2) To terminate an open routing slip, do the following:
 - a. Open the Working Folder.
 - b. Click on the line of the routing slip to be terminated.
 - c. Click File.
 - d. Select Terminate Routing Slip from the drop-down menu.
 - e. Click OK on the termination verification screen to complete the action.
- (3) See Exhibit 7.15.8-18, **Terminating - Routing Slip**.

7.15.8.10
(07-19-2013)

Closing - Routing Slip

- (1) When the routee/router's/router completes the routing slip, TEDS sends a message to the router's Inbox indicating an action is required. The router should review the routing slip and comments.
- (2) To close the routing slip notification, the router must open the completed routing slip notification and click **Review Complete**. Closing the routing slip is a TEDS case closure requirement.
- (3) See Exhibit 7.15.8-19, **Routing Slip Completed Notification** and Exhibit 7.15.8-20, **Closing the Routing Slip**.

Exhibit 7.15.8-1 (07-19-2013)

Create Routing Slip

Create Routing Slip

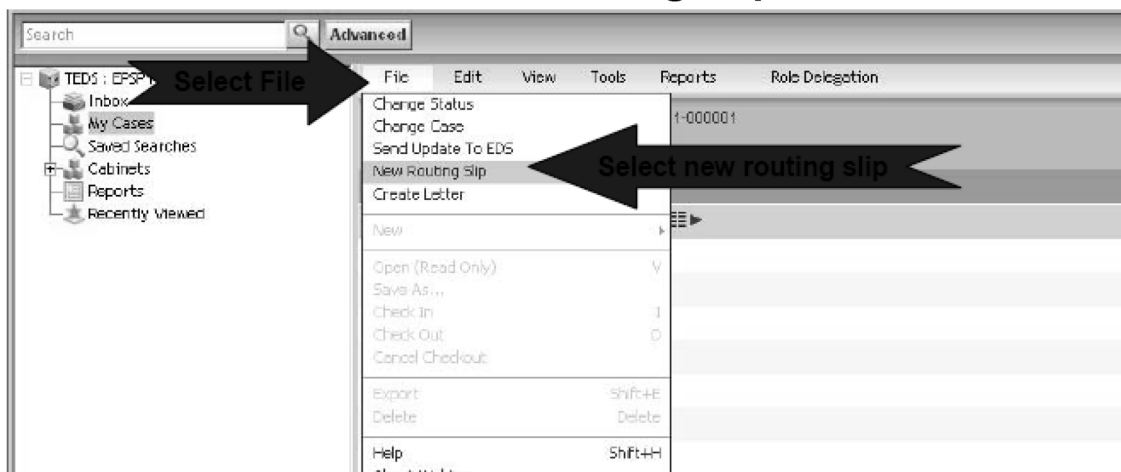


Exhibit 7.15.8-2 (07-19-2013)
Routing Slip Information Tab

Routing Slip Information Tab

Edit Form : Routing Slip - EP-2010011-000001

Do not use the Comments Tab when creating a Routing Slip

Info **Comments** Attachments Users

From EPSP1

Case Number EP-2010011-000001 [Link to case folder](#)

Applicant Name TESTING NAME

EIN

Plan Number 001

Subject Line

Subject Please review this case.

Description Box
Enter the Initial Description here

Description

Follow-up Date Date

Finish Cancel

Exhibit 7.15.8-3 (07-19-2013)

Attachment Tab- Adding an Attachment

Attachment Tab – Adding an Attachment

Edit Form : Routing Slip - EP-2010011-000001

Info

Comments

Attachments

Users

Attachments

Add

Remove

Name

none selected

Click Add to attach documents

Finish

Cancel

?

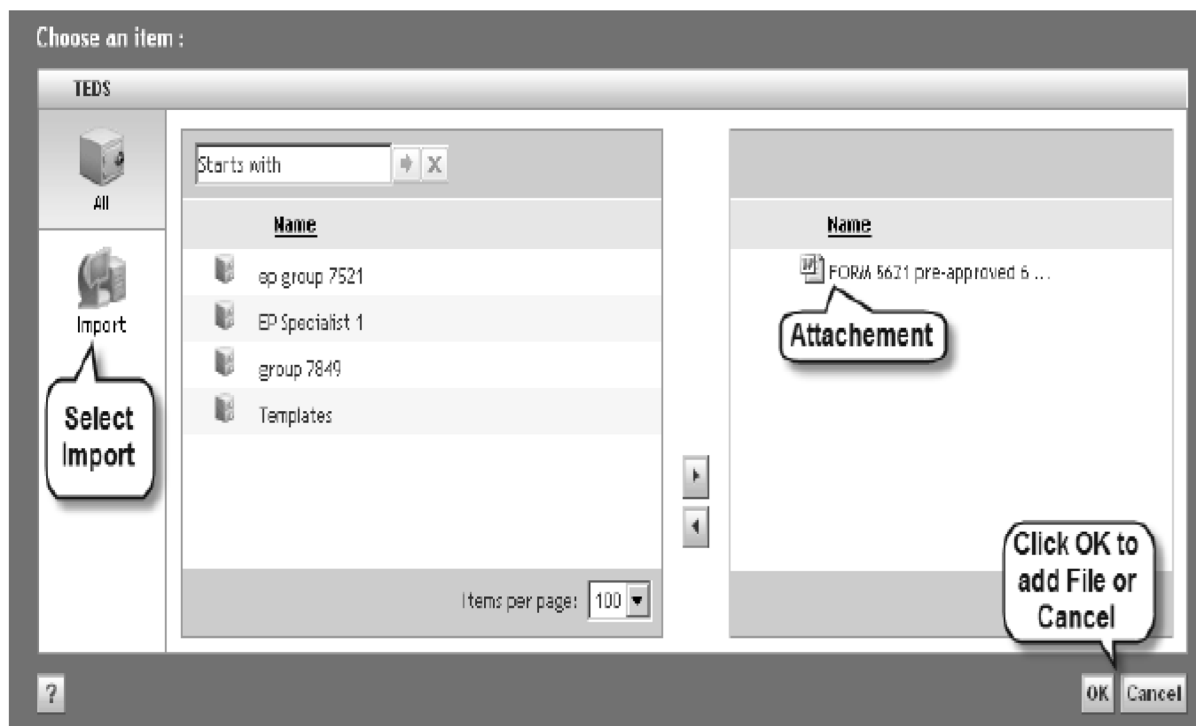
Exhibit 7.15.8-4 (07-19-2013)**Import to Add Attachment****Import to Add Attachment**

Exhibit 7.15.8-5 (07-19-2013)

Attachments Tab - Removing an Attachment

Attachments Tab – Removing an Attachment

Edit Form : Routing Slip - EP-2010011-000001

To Remove Attachment check box and click Remove

Info	Comments	Attachments	Users				
Attachments (Add) (Remove)							
<table border="1"><thead><tr><th colspan="2">Name</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>FORM 5621 pre-approved 6 year RAC - 110909.doc</td></tr></tbody></table>				Name		<input type="checkbox"/>	FORM 5621 pre-approved 6 year RAC - 110909.doc
Name							
<input type="checkbox"/>	FORM 5621 pre-approved 6 year RAC - 110909.doc						
<table border="1"><tr><td>Finish</td><td>Cancel</td></tr></table>				Finish	Cancel		
Finish	Cancel						

?

Exhibit 7.15.8-6 (07-19-2013)
Select Recipients (Routees)

Select Recipients (Routees)

Edit Form : Routing Slip - EP-2010011-000001

Info Comments Attachments Users

Select users in sequential routing order.

* Available Users

7520 -	▲
7520 -	■
7520 -	▶
7520 -	◀
7521 -	▼

Selected Users

7521 -

Finish Cancel

?

Highlight receipt and select right arrow

Click Finished or Cancel

Tax Exempt Determinations Systems (TEDS) Routing Slip Features 7.15.8

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Exhibit 7.15.8-7 (07-19-2013)

Routee's Inbox Notification

Routee's Inbox Notification

Search [] Advanced [] User Profile [] Logout []

File Edit View Tools Reports Role Delegation

Inbox (TEDS) Show All (Attachments) [] Items per page: 100 []

Page 1 of 1 []

Subject	Subject	From	Date Received	Due Date	Status	Repository
Review Routing Slip	Review Routing Slip	TEDS	9/27/2010 9:59 AM		Dormant	
Routing Slip - EP-2010011-000001						
Request Manager Review	Request Manager Review	TEDSdoctsvc	9/20/2010 1:50 PM			
Routing Slip has been Terminated	Routing Slip has been Terminated	TEDSdoctsvc	9/20/2010 1:49 PM			
Abort Workflow	Abort Workflow	TEDSdoctsvc	9/20/2010 1:49 PM			
Delegated Role Expiring	Delegated Role Expiring	TEDSdoctsvc	8/24/2010 12:47 PM			
Role Delegation in Progress	Role Delegation in Progress	TEDSdoctsvc	8/24/2010 12:41 PM			
Delegated Role Cancelled	Delegated Role Cancelled	TEDSdoctsvc	8/24/2010 12:13 PM			
Role Delegation in Progress	Role Delegation in Progress	TEDSdoctsvc	8/24/2010 11:58 AM			

Click link to view routing slip notification

Acquired Means the notification has been opened

Dormant Means the notification is new and has not been opened

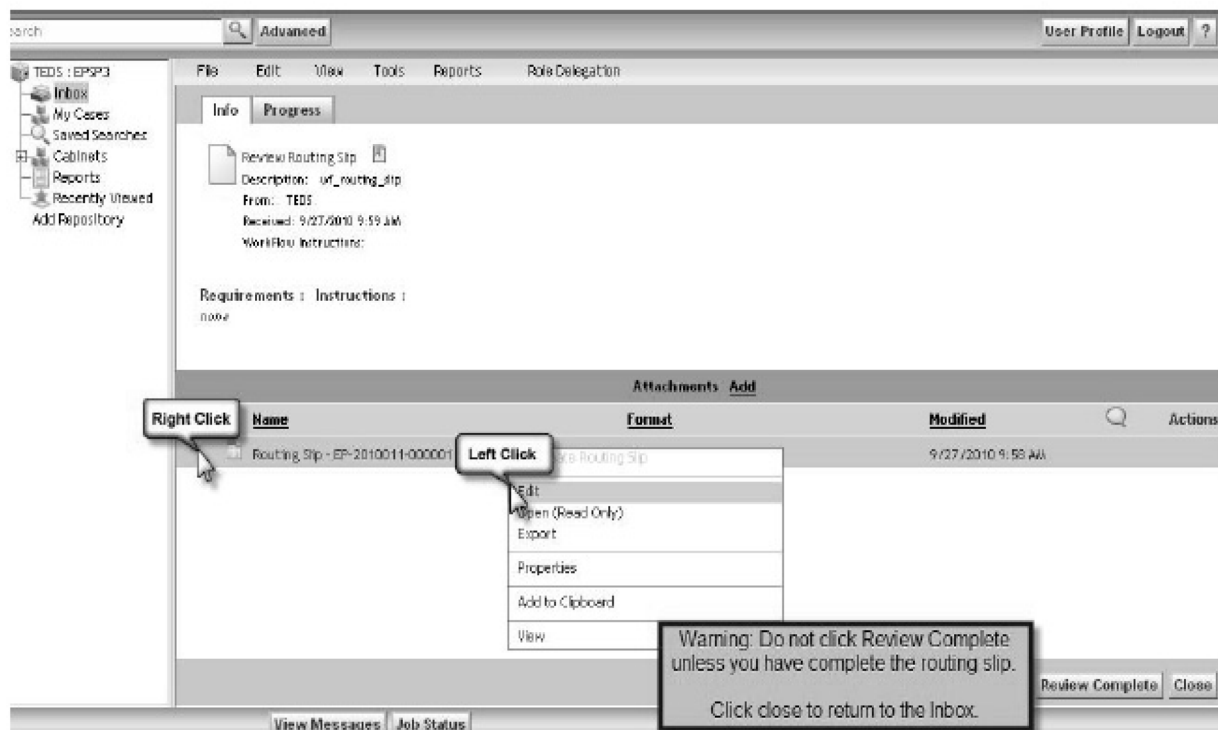
Exhibit 7.15.8-8 (07-19-2013)**Reviewing the Routing Slip****Reviewing the Routing Slip**

Exhibit 7.15.8-9 (07-19-2013)
Routee's View of the Routing Slip

Routee's View of the Routing Slip

Edit Form : Routing Slip - EP-2010011-000001




Info	Comments	Attachments
<p>From EPSP1</p> <p>Case Number EP-2010011-000001 Link to case folder</p> <p>Applicant Name TESTING NAME</p> <p>EIN</p> <p>Plan Number 001</p> <p>Subject <input type="text" value="Please review this case."/></p> <p>Description <input type="text"/></p> <p>Follow-up Date <input type="text" value="Date"/> <input type="button" value="Calendar"/></p>		

Link to the Case folder will open the case in a new window

Exhibit 7.15.8-10 (07-19-2013)
Attachments Tab (Routee's View)

Attachment Tab (Routee's View)

Edit Form : Routing Slip - EP-2010011-000001

Info	Comments	Attachments				
<p>Attachments</p> <p>[Add] [Remove]</p> <table border="1"><thead><tr><th></th><th>Name</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td> 5621 Technical Analysis.pdf</td></tr></tbody></table>				Name	<input type="checkbox"/>	 5621 Technical Analysis.pdf
	Name					
<input type="checkbox"/>	 5621 Technical Analysis.pdf					
<p>Finish Cancel</p>						

Click to access attachment

Click Finish to complete or Cancel

Exhibit 7.15.8-11 (07-19-2013)

Routee Comments Tab

Routee Comments Tab

Edit Form : Routing Slip - EP-2010011-000001

Info Comments Attachments

Routing Slip comments and date to be displayed for each user.

Comments

Recipient may add comments

Click Finish to add comments

Finish Cancel

Exhibit 7.15.8-12 (07-19-2013)
Completing the Routing Slip

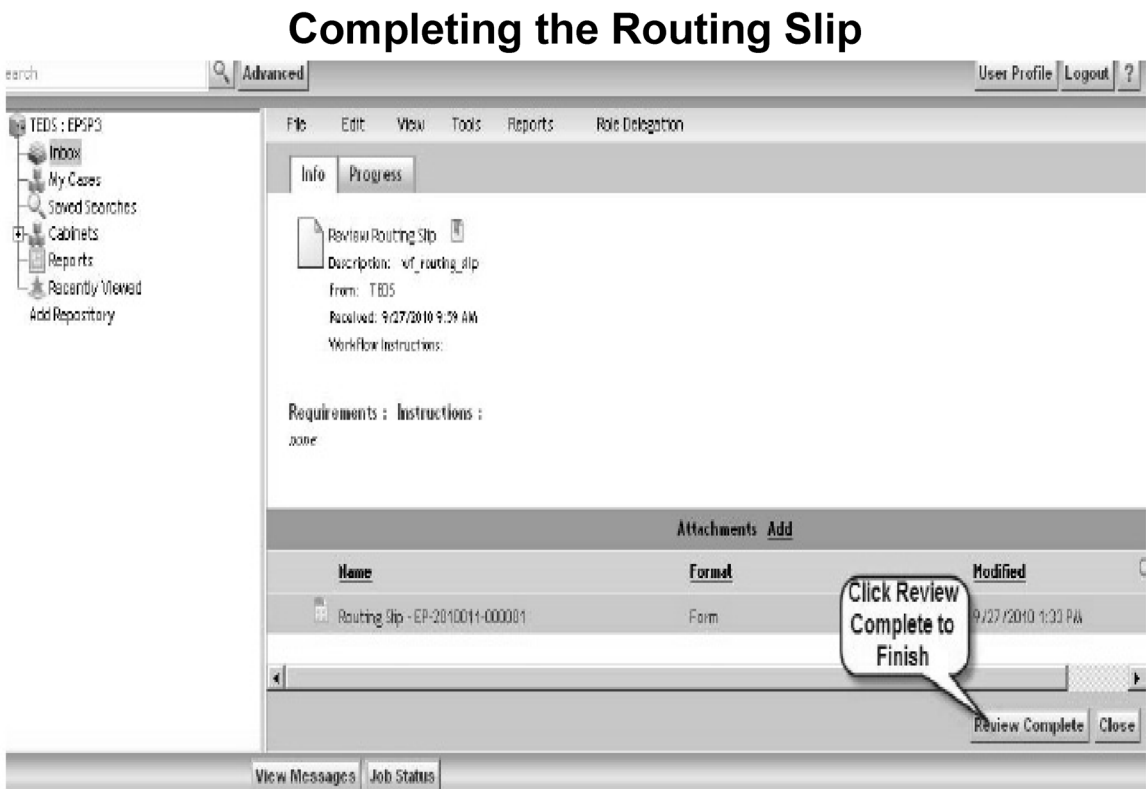


Exhibit 7.15.8-13 (07-19-2013)

Notification of Completed Review - Router's Inbox

Notification of Completed Review – Router's Inbox

The screenshot shows the TEDS Router's Inbox interface. The left sidebar contains a tree view with items: TEDS : EPSP1, Inbox, My Cases, Saved Searches, Cabinets, Reports, Recently Viewed, and Add Repository. The main area is titled 'Inbox (TEDS)' and displays a list of notifications. The first notification is 'Routing Slip has been Completed' with a status of 'Dormant'. A callout box points to this notification with the text: 'Router notification of completed review and completed slip (Note that action may or may not be required based on status of slip)'.

Subject	Subject	From	Date Received	Due Date	Status	Repository
<u>Routing Slip has been Completed</u>	Routing Slip has been Completed	TEDS	9/27/2010 1:39 PM		Dormant	
	Routing Slip - EP-2010011-000001					
<u>Routee has Completed Review</u>	Routee has Completed Review	TEDS	9/27/2010 1:39 PM			
<u>Related Case - EP-2010267-000003</u>	Related Case - EP-2010267-000003	TEDSdoctsvc	9/24/2010 9:02 AM			
<u>Related Case - EP-2010267-000003</u>	Related Case - EP-2010267-000003	TEDSdoctsvc	9/24/2010 9:02 AM			
<u>Related Case - EP-2010267-000004</u>	Related Case - EP-2010267-000004	TEDSdoctsvc	9/24/2010 9:01 AM			

Exhibit 7.15.8-14 (07-19-2013)
Completing Routing Slip - Routee

Completing Routing Slip - Routee

The screenshot displays the TEDS (Tax and Employee Data System) interface. On the left is a navigation pane with links to 'Inbox', 'My Cases', 'Saved Searches', 'Cabinets', 'Reports', 'Recently Viewed', and 'Add Repository'. The main content area has a menu bar with 'File', 'Edit', 'View', 'Tools', 'Reports', and 'Role Delegation'. Below the menu is an 'Info' tab. A message icon indicates 'Routee has Completed Review'. The message details are: 'From: TEDS' and 'Received: 9/27/2010 2:14 PM'. A callout bubble points to the message with the text 'Routing slip sent to next recipient on list'. Below the message, the 'Instructions' section states: 'Joe has finished review. The case has been routed to Rafal'. An 'Attachments' table is shown below the instructions.

Attachments				
Name	Format	Modified		Actions
Routing Slip - EP-2010011-000001	Form	9/27/2010 2:14 PM		

At the bottom right of the attachments table are 'Delete' and 'Close' buttons. At the bottom of the window are 'View Messages' and 'Job Status' buttons.

Exhibit 7.15.8-15 (07-19-2013)

Case History Folder

Case History Folder

EP-20100 11-00000 1

Advanced Last Results

User Profile Logout ?

File Edit View Tools Reports Role Delegation

Cabinets/.../EP Cases/2010/01/EP-20100 11-00000 1/Case History

Case History Starts With Show Files and Folders

Page 33 of 33 Items per page: 10

Status Code	Event Code	Date	User	Comments
62		9/27/2010 9:58 AM	TEDS	Changes to Case Data
62	RI	9/27/2010 9:58 AM	TEDS	Routing Slip Created
62	RS	9/27/2010 9:59 AM	TEDS	Routing Slip Routed to Newton, Rafal - EPSP3
62	RV	9/27/2010 1:00 PM	EPSP3	Routing Slip Viewed
62		9/27/2010 1:38 PM	TEDS	Changes to Case Data
62		9/27/2010 1:57 PM	TEDS	Changes to Case Data
62	RI	9/27/2010 1:57 PM	TEDS	Routing Slip Created
62	RS	9/27/2010 1:58 PM	TEDS	Routing Slip Routed to Blows, Joe - EPSP2
62		9/27/2010 2:10 PM	TEDS	Changes to Case Data
62	RS	9/27/2010 2:15 PM	TEDS	Routing Slip Routed to Newton, Rafal - EPSP3

View Messages Job Status

Routing slip entries are listed in case action order (Note there are multiple pages in this case history)

Exhibit 7.15.8-16 (07-19-2013)
Inbox Notification - Progress Tab

Inbox Notification – Progress Tab

Routing Slip has been Completed

Description: [not_routing_slip](#)

From: TEDS

Received: 9/27/2010 1:39 PM

Workflow Instructions:

Up coming...	
Next	Performer
Mark Routing Slip Complete	TEDS

History		
Event	Performer	Date
Finished: Initiate Routing Slip	TEDS	9/27/2010 9:58 AM
Finished: SetPerformers	TEDS	9/27/2010 9:59 AM
Finished: Review Routing Slip	EPSP3	9/27/2010 9:59 AM
Finished: Mark Route Complete	TEDS	9/27/2010 1:38 PM
Finished: SetPerformers	TEDS	9/27/2010 1:39 PM
Acquired: Routing Slip has been Completed	EPSP1	9/27/2010 1:39 PM

Warning: Do not click Review Complete unless the routing slip is finished. Use Close to return to Inbox.

Review Complete Close

View Messages Job Status

Exhibit 7.15.8-17 (07-19-2013)

Case Information - General Case Info. Tab

Case Information – General Case Info Tab

Properties: Info

General Case Info. Plan Info. Receipt and Handling Entity Data Contacts EP Closing Data Permissions

Case Classification: **Went**

Case Category: [Edit](#) Request after initial qualification - amended, Defined benefit plan, Volume Submitter plan (5007)

Closing Rule Failure Reason: [Edit](#)

Potential Duplicate Flag: ☐

Duplicate Case Number:

EDS Case Number: 450013000

EDS Block Indicator: F

Follow Up Date: Jul 30, 2010 10:00AM

Routing Slip Indicator: T

Routing Slip Indicator:
T=Open
F=None or Closed

? OK Cancel

Exhibit 7.15.8-18 (07-19-2013)
Terminating - Routing Slip

Terminating - Routing Slip

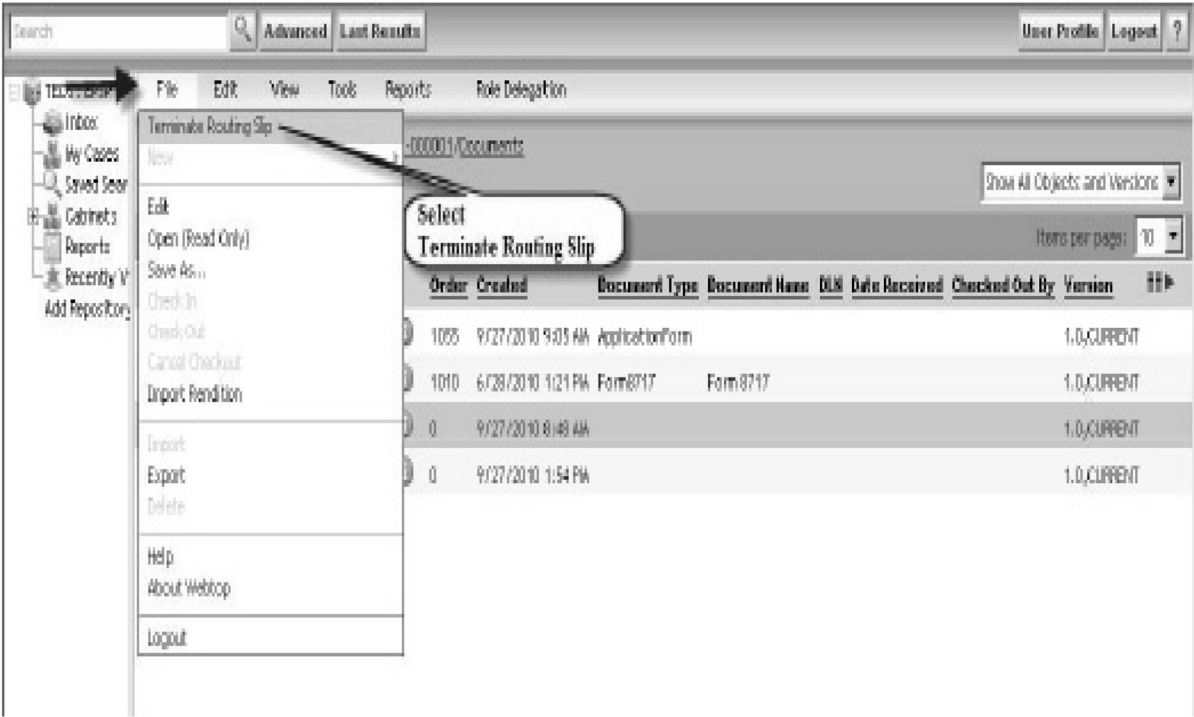


Exhibit 7.15.8-19 (07-19-2013)

Routing Slip Completed Notification

Routing Slip Completed Notification

The screenshot displays the TEDS (Tax Exempt Determinations Systems) interface. On the left is a navigation pane with links to 'Inbox', 'My Cases', 'Saved Searches', 'Cabinets', 'Reports', 'Recently Viewed', and 'Add Repository'. The main window has a menu bar (File, Edit, View, Tools, Reports, Role Delegation) and a toolbar with 'Search', 'Advanced', 'User Profile', 'Logout', and a help icon. The central area is titled 'Inbox (TEDS)' and contains a table of notifications. A speech bubble with the text 'Notification that the routing slip was completed by recipients' points to the first row of the table.

Subject	Subject	From	Date Received	Due Date	Status	Reply
<u>Routing Slip has been Completed</u>	Routing Slip has been Completed Routing Slip - IP-2010011-408001	TEDS	9/27/2010 3:33 PM		Domant	
<u>Routee has Completed Review</u>	Routee has Completed Review	TEDS	9/27/2010 3:33 PM			
<u>Abort Workflow</u>	Abort Workflow	TEDSdoctwo	9/27/2010 3:03 PM			
<u>Routing Slip has been Terminated</u>	Routing Slip has been Terminated	TEDSdoctwo	9/27/2010 3:03 PM			
<u>Routee has Completed Review</u>	Routee has Completed Review	TEDS	9/27/2010 2:14 PM			

Exhibit 7.15.8-20 (07-19-2013)**Closing the Routing Slip**

Closing the Routing Slip

