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Department of the Treasury
Internal Revenue Service

7.15.6

AUGUST 20, 2025

EFFECTIVE DATE

(08-20-2025)

PURPOSE

- (1) This transmits revised IRM 7.15.6, Employee Plans TEDS User Manual, Navigating the Tax Exempt Determination System (TEDS).

MATERIAL CHANGES

- (1) IRM 7.15.6.1(5) Added Primary Stakeholders.
- (2) IRM 7.15.6.1.3 Added Roles and Responsibilities.
- (3) IRM 7.15.6.1.4 Added Program Management and Review.
- (4) IRM 7.15.6.1.5 Added Program Controls
- (5) IRM 7.15.6.1.6 Renamed Acronyms to Terms and Acronyms.
- (6) IRM 7.15.6.1.7 Added Related Resources.
- (7) Various edits have been made throughout the IRM for clarity.

EFFECT ON OTHER DOCUMENTS

This supersedes IRM 7.15.6, dated November 21, 2021.

AUDIENCE

Tax Exempt and Government Entities
Employee Plans

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7.15.6

Navigating the Tax Exempt Determination System (TEDS)

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7.15.6.1
(08-20-2025)
Program, Scope and Objectives

- (1) **Purpose:** This IRM discusses guidance on navigating the Tax Exempt Determination System (TEDS).
- (2) **Audience:** Employee Plans (EP) employees involved in the issuance of determination letters.
- (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, plan participants.
- (6) **Program Goal:** To explain:
 - How to use the TEDS Repository to search, retrieve and view case data and images.
 - How to change TEDS case data and entity information.
 - How to create, edit and execute (run) search queries.
 - How to use Optical Character Recognition (OCR).
 - How TEDS interacts with Employee Plans-Exempt Organizations Determination System (EDS) in the case closing process.

7.15.6.1.1
(11-23-2021)
Background

- (1) The Tax Exempt Determination System (TEDS) is the primary system Employee Plans (EP) uses to process Determination Letter (DL) applications. Generally, EP will establish and work DL applications in TEDS but create the final DL in the EP/EO Determination System (EDS).
- (2) TEDS stores in an electronic Records Repository:
 - a. Images of original determination applications and associated data.
 - b. Subsequent related documentation.

7.15.6.1.2
(11-23-2021)
Authority

- (1) Delegation Order 7-1, IRM 1.2.2.8.1, states the Director, Employee Plans has authority to issue favorable DLs on the qualified status of:
 - a. Pension, profit-sharing, stock bonus, annuity, and employee stock ownership plans under IRC 401, IRC 403(a), IRC 409, and IRC 4975(e)(7).
 - b. 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*.

7.15.6.1.3
(08-20-2025)
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).

7.15.6.1.4
(08-20-2025)
**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 to IRS leadership on a regular, recurring basis. Effectiveness is measured by analysis of compliance trends and results.

7.15.6.1.5 (08-20-2025) 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 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 (irs.gov).
 - a. For questions about privacy, email **Privacy*.
 - b. For questions about disclosure, email **Disclosure*.

7.15.6.1.6 (08-20-2025) Terms and Acronyms

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

Acronym	Term
BRE	Business Rules Engine
DL	Determination Letter
EDS	EP/EO Determination System
EP	Employee Plans
EP/EO	Employee Plans-Exempt Organizations
NAI	National Assigned Inventory

Acronym	Term
NUI	National Unassigned Inventory
OCR	Optical Character Recognition
TEDS	Tax Exempt Determination System

7.15.6.1.7
(08-20-2025)

Related Resources

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

7.15.6.2
(06-12-2013)

Document Repository

- (1) The document repository is a virtual storehouse. It contains:
 - Electronic cabinets.
 - Individual case folders that store images of documents, reports, templates, messages, and personal files.
- (2) The document repository enhances EP Determinations ability to:
 - Organize work processes.
 - Manage case inventory.
 - Identify and associate documents with the correct case folder.
 - Ease determination applications processing.
 - Research open and closed inventory.
- (3) Use the documents repository to search, retrieve and view data and images. Access the different system components through the “Navigation” screen. As a user, you are given roles and permissions that allow you to access specific aspects of the system. Your permissions are based on your role(s). (See IRM 7.15.4, Tax Exempt Determination System (TEDS) Roles and Delegations.)

7.15.6.2.1
(06-12-2013)

Screen Selection Options

- (1) The following terms are used to describe the different parts of the TEDS screen:

Term	Description
Navigation Pane	Contains your Inbox, My Cases, Templates, etc. and allows you to navigate through the repository.
Data Grid	Displays case information.
Column Labels	Lists the case attributes. You can sort and display in any order, and customize.

- (2) From the Navigation Pane, select any of the following options to navigate through the system:
 - Inbox.
 - Saved Searches.
 - My Cases.

- Cabinets.
- Reports.
- Recently Viewed.

Note: See Exhibit 7.15.6-1, Screen Selection Options.

- (3) The data screen is located in the lower center of the screen. It displays the case information when you select My Cases from the Navigation Pane.
- (4) The function buttons are located above the “column labels.” You can sort and display them in any order and customize them. The following options allow different actions based on your location in TEDS:
 - File.
 - Edit.
 - View.
 - Tools.
 - Reports.

Note: See Exhibit 7.15.6-1.

7.15.6.3 (06-12-2013) Cabinets

- (1) Cabinets are the highest level of organization in the repository. Cabinets store and organize file folders and provide easy access to case files and templates.
- (2) The two types of cabinets are:
 - Universal.
 - Personal.

7.15.6.3.1 (06-12-2013) Universal Cabinets

- (1) TEDS Universal Cabinets:

Cabinet	Description
TEDS Inventory Cabinets	<ul style="list-style-type: none"> • Highest levels of organization for TEDS cases are: <ol style="list-style-type: none"> a. National Unassigned Inventory. b. National Assigned Inventory. c. Archived Cases. • Cases are sorted by Employee Plans (EP) or Exempt Organization (EO), by year and by month. • EP cases display for EP users. • EO cases display for EO users. • Cases move from one cabinet to another based on status code changes. • Group 7849 - The queue for printing Repository Notices and Letters.
National Unassigned Inventory (NUI)	<ul style="list-style-type: none"> • NUI cabinets store unassigned cases.

Cabinet	Description
National Assigned Inventory (NAI)	<ul style="list-style-type: none"> NAI cabinets store cases that are assigned to a group or a specialist.
Archived Cases	<ul style="list-style-type: none"> Archived Cases “year” cabinets store closed cases, including cases that have been scanned into TEDS after closing on EDS. Currently, TEDS closed cases stay in the National Assigned Inventory in Status 57 or 59. (A case closed on TEDS moves from the NAI to the Archived Cases when updated to status 21.)

- (2) Only the Records Manager and the National Unassigned Inventory Manager can see the National Unassigned Inventory (NUI), the National Assigned Inventory (NAI) and the Archived Cabinet.

7.15.6.3.2
(09-23-2014)

Personal Cabinets

- (1) Personal cabinets are unique to each TEDS user’s roles.
- (2) Examples of TEDS personal cabinets include:

- Inbox.
- My Cases.
- Saved Searches.
- Cabinets.
- User Group Number.
- Group 7849.
- Templates.
- Reports.
- Recently Viewed.

7.15.6.3.2.1
(09-17-2015)

Inbox Cabinet

- (1) The Inbox cabinet alerts you of system events or received receipt.
- (2) The Inbox cabinet receives notifications of:
- New case assignments or cases returned from the manager.
 - Receipt of new documents.
 - A related case.
 - Case sent to manager for review or proposed closing.
 - Routing slip.
 - Role delegation.
- (3) To open a notification, double-click on the link. You’ll find additional information when you open a notification. See Exhibit 7.15.6-1, Screen Selection Options.

7.15.6.3.2.2
(06-12-2013)

My Cases Cabinet

- (1) The My Cases cabinet:
- Contains cases assigned to you.
 - Provides easy access to your inventory.
- (2) By clicking on My Cases, you can access and work assigned TEDS cases.
- View case data.

- View case file images.
- Create a case chronology entry.
- View payment information.
- View case reports.

- (3) A manager's My Cases cabinets contain all cases assigned to the group including unassigned group inventory or group suspense.
- (4) Managers also have a cabinet titled "User Cases." The User Cases allows the manager to select and display a specific group member's case listing. It contains links to each case assigned to direct reports (so both the specialist and the group manager own a case).

7.15.6.3.2.3
(09-23-2014)

Saved Searches Cabinet

- (1) The Saved Searches cabinet allows you to access a saved search. The cabinet appears after you have saved one or more searches.

7.15.6.3.2.4
(09-23-2014)

Reports Cabinet

- (1) The Reports cabinet allows you to generate various reports, such as:
 - Cases by Power of Attorney Report.
 - Multiple Case Summary.
 - Case Progress.
 - Individual Case Information.
 - TEDS Case Processing Reports.
 - TE/GE Case Reconciliation Report.
 - Case Status Report.
 - Case History Record.

7.15.6.3.2.5
(06-12-2013)

Recently Viewed Cabinet

- (1) The Recently Viewed cabinet provides a link to recently viewed documents and folders.

7.15.6.4
(09-23-2014)

Accessing a Case File

- (1) Click on the "My Cases" cabinet. Choose the case you want to access by clicking on "Case Information" or clicking on the yellow folder. You see the various files and folders contained within the case.
- (2) Files are designated by an icon of a piece of paper. Access by clicking on the little blue "i".
- (3) Folders are designated by a file folder icon. Access a folder by clicking the folder name.
- (4) The following table lists the folders and information contained:

Folder	Contains
Case Information	Entity specific data such as Document Locator Number (DLN), applicant name, contacts, address, control date, user fee, etc.
Documents	Documents related to case (application, organizing document(s), work papers, etc.).

Folder	Contains
Case Chronology	Case chronology entries that have been created for the case.
Case History	Information on all the status code changes made to the case.
Payments	User fee payment information.
BRE Results	View results of the Business Rules Engine.
Related Cases	Cases with the same Employer Identification Number (EIN) and plan number.

- (5) The TEDS case file “main screen” is shown in Exhibit 7.15.6-2, TEDS Case File Main Screen.

7.15.6.5 (09-23-2014)

Case Information File

- (1) Case information is shown on several different tabs within the Case Information File. Information in this file includes:
- Data transcribed at scanning.
 - Information derived from opening business rules.
 - Receipt and handling information.
 - Information users enter throughout case processing.

Note: See IRM 7.15.7.3.4, Accessing Case Information.

Note: The Case Information File opens as a separate window.

7.15.6.6 (09-23-2014)

Viewing Documents in TEDS

- (1) The Documents folder contains all documents the applicant submitted and documents the specialist prepared and imported.
- (2) Open the Documents folder by double-clicking **Documents**.
- (3) When the Documents folder opens, you'll see the below subfolders and their contents:

Subfolder	Contains
New Documents	Documents received in TEDS after the original case was established. (When TEDS receives new document(s), the number of documents will be in parentheses.)
Working	Open routing slip(s), final draft letters.
Disclosable	Documents scanned in when the case is first established, subsequently imported or moved from another document subfolder.
Non-Disclosable	Documents the specialist has determined are non-disclosable.
Purge	Items the specialist determines are immaterial to the administrative case file.

- (4) Access and view individual subfolders and the documents or files within the subfolders by double-clicking the folder or by clicking the underlined document name(s).

7.15.6.7
(06-12-2013)

Display Screen Options

- (1) You can customize the display screens.

7.15.6.7.1
(09-23-2014)

Page Display

- (1) Items per page are set to a default of 10, but you can change the setting to 50 or 100. (If you can't see the option to change items per page, scroll to the far right of the screen.)
- (2) To change the number of items displayed per page, click on the Items per page drop-down arrow on the column label bar and select the desired display setting. The suggested items per page setting is 50.
- (3) If there are more items available to view on the items per page, use the single arrow on the toolbar to move from one page to the previous or next page. Use the double arrows to go to the first or last page of the list.

7.15.6.7.2
(09-23-2014)

Column Headers

- (1) Each data grid display contains unique column headers for specific information displayed in the data grid. You can change the information displayed on the screen by adding, reordering or removing column headers.
- (2) Follow these steps to change the column header:

Step	Action
1.	Click on My Cases.
2.	Click on the Column Preferences icon in the column header field on the far right of the screen.
3.	Scroll to the right if the icon isn't shown.

- (3) After you click on the Column Preferences icon, the Preferences: Display Settings menu appears.

7.15.6.7.3
(09-23-2014)

Removing Column Headers

- (1) Delete column headings from the display by removing them from the default items list.
- (2) Follow these steps to remove a column header:

Step	Action
1.	Click on the column attribute located in the Selected attributes to display as column: box on the right.
2.	Click on the left arrow to move the attribute into the Select attributes to display box on the left.
3.	Click OK to accept the changes.

Note: See Exhibit 7.15.6-3, Removing Column Headers.

7.15.6.7.4
(09-23-2014)
Re-ordering Column Headers

- (1) You can organize the information on the data grid by choosing the order in which the columns display. The Re-order function is available for most cabinets.
- (2) The following table shows the steps to move a column header:

Step	Action
1.	Click on the column header you want to re-order in the Selected attributes to display as column: box on the left.
2.	Click on the up or down arrow to move the column header to the desired location.
3.	Click OK to accept the changes.

Note: See Exhibit 7.15.6-4, Re-order Column Headers.

- (3) The attributes are displayed in the “Selected attributes to display as column:” box in the order that they appear as column headers on the data grid from left to right. You can’t use the Re-order function for the Inbox.

7.15.6.8
(06-12-2013)
User Profile

- (1) The User Profile stores:
 - Your profile information.
 - Group information.
 - Information about roles that are assigned to you.
- (2) Access the User Profile screen by clicking User Profile next to the Logout button at the top of the screen.

7.15.6.8.1
(06-12-2013)
TEDS Roles

- (1) One of the items listed in your profile is your TEDS role(s). You are assigned specific roles based on your position and needs.
- (2) See IRM 7.15.4, Tax Exempt Determination System (TEDS) Roles and Delegation for additional information.

7.15.6.8.2
(06-12-2013)
Group Profile Screen

- (1) Group information is also stored in your profile. Access by clicking the underlined Employee Group Number on the User Profile screen.
- (2) The Group Profile screen shows administrative information about your group.

7.15.6.9
(09-23-2014)
Query and Search Capabilities

- (1) TEDS query and search features are used to locate a case, find a power of attorney or do general research.
- (2) Query and search makes it easier to research determination case information.

7.15.6.9.1 (09-23-2014) Query Options

- (1) TEDS has three query options:
 - Simple Search.
 - Advanced Search.
 - Reports.
- (2) Begin each query with the menu options on the top of the web page.
- (3) Use the Search to perform a simple query with the TEDS case number.
- (4) Use the Advanced Search to perform a query based on specific property or multiple properties. You can also use advanced search to generate a simple case listing report.

7.15.6.9.1.1 (09-23-2014) Simple Search Query

- (1) Follow these steps to perform a simple search query:

Step	Action
1.	Enter a TEDS case number (EP-yyyynnnn-nnnnnn, or any part of it) in the box at the top of the web page
2.	Click Go .

Note: The simple search function is case, dash and space sensitive.

7.15.6.9.1.2 (09-17-2015) Advanced Search Query

- (1) Use the advanced search to locate a TEDS case number or search for more than one case.
- (2) To start an advanced search, click **Advanced Search** at the top of the Web page.
- (3) The Advanced Search page opens to the Advanced Search General tab, which displays the different search options. Use advanced search to customize a query based on:
 - a. Predetermined location(s) in which to search (Object Type).
 - b. Single property value or multiple property values (Properties).
 - c. Specific actions that occurred during specific time frames (Date).
 - d. File size (Size).
- (4) After you enter the desired search criteria, all queries, run by clicking "Search" at the bottom of the page. See Exhibit 7.15.6-5, Advanced Search Query Screen.
- (5) After you do an advanced search, you can add more attributes to the search display by using the Preference Tables.

Step	Action
1.	Go to Select Object.
2.	Select TEDS Case.
3.	Highlight the attribute you need.

Step	Action
4.	Click on the right arrow.

Note: See Exhibit 7.15.6-6, Preferences: Display Settings: Classic Columns for Search.

7.15.6.9.1.2.1
(09-23-2014)
Selecting Object Type

- (1) Using the advanced search query, select the search location by clicking on the Object Type drop-down arrow. Each Object Type will have a different set of Property values. See Exhibit 7.15.6-7, Selecting Object Type.
- (2) Search on these object types:
 - EP Cases.
 - Routing Slips.
 - TEDS users.

7.15.6.9.1.2.2
(09-23-2014)
Properties

- (1) Perform advanced searches using the Properties button. See Exhibit 7.15.6-8, Searching by Properties' Field.
- (2) To search using Properties, perform these steps:

Step	Action
1.	First field: click on the drop-down arrow to select a property.
2.	Third field: enter the search value (e.g., EIN, applicant name, etc.).

- (3) If you use this search option with the = used, it will only return an exact match (such as, status = 62). Results won't include cases with sub status codes. If the status contains 62, then cases with sub statuses will be returned (62AD, 62AI, etc.).

7.15.6.9.1.2.2.1
(09-23-2014)
Add Additional Property

- (1) You can search on more than one property. See Exhibit 7.15.6-9, Adding Additional Property Values.
- (2) Search using multiple properties by clicking "Add another property" and selecting one of the following options:
 - "And" will return search results that match this property value and the property value on the previous line. This limits the search.
 - "Or" will return search result that match this property value or the property value on the previous line. This expands the search.

7.15.6.9.1.2.2.2
(09-23-2014)
Removing Property

- (1) If the search result(s) aren't the expected outcome, you can eliminate some properties in the search criteria. See Exhibit 7.15.6-10, Removing Search Properties.
- (2) To remove a property, click "Remove" next to the property you want to eliminate.

7.15.6.9.1.2.3
(09-23-2014)
Searching by Date

- (1) Use the Date field to search using various date elements for a specified time period. See Exhibit 7.15.6-11, Searching by Date.
- (2) To search using the Date field:
 - Select case requirements in the Properties line.
 - Select the date and time period in the remaining fields.

7.15.6.9.1.2.4
(09-23-2014)
Searching by Size

- (1) Use the Size field to search for files within a specific size range. Search by size by selecting the desired size criteria from the drop-down menu. See Exhibit 7.15.6-12, Searching by Size.

7.15.6.9.2
(09-23-2014)
Search Results and Editing Search Criteria

- (1) Search results display the cases that match the search criteria.
- (2) If the query is a text-based property, such as "name," the words that match the search value(s) are highlighted.
- (3) The search result will list the cases in control date order.

7.15.6.9.2.1
(09-23-2014)
Count Results

- (1) If the query produces a large result list or if you only need the case, click **the magnifier** to get the number of case results. The query will continue to process. See Exhibit 7.15.6-13, Query Results Count Only.
- (2) If you only need to search for the number of cases results, place a check in the **Show Result Count** box.

7.15.6.9.2.2
(09-23-2014)
Editing Searches

- (1) You can edit and rerun the query if the query didn't return the expected outcome. See Exhibit 7.15.6-14, Sample Search Results/How to Begin Edit Search.
- (2) Use the following steps to edit a query:

Step	Action
1.	Click on Edit Search .
2.	Modify the search criteria.
3.	Click Search to rerun the query.

Note: If an individual case was selected from the results, use the **Last Results** button rather than the **Back** button on the internet browser to return to the most recent search results.

7.15.6.9.2.3
(09-23-2014)
Saving Searches

- (1) Save advanced search query criteria to view or run again. See Exhibit 7.15.6-15, Methods of Saving a Search and Exhibit 7.15.6-16, Naming the Saved Search.
- (2) To identify the saved search, complete the “Name and Description” fields:

Step	Action
1.	Click OK to save the search.
2.	Click box to uncheck Include Results .

Note: By unchecking this box, the search parameters are saved and not the specific results of the search.

7.15.6.9.2.4
(09-23-2014)
Finding Saved Searches

- (1) Access saved searches by clicking Saved Searches in the Navigation Pane. See Exhibit 7.15.6-17, Finding a Saved Search.

7.15.6.9.2.5
(09-23-2014)
Run a Saved Search Query

- (1) You can revise, rerun or delete your own saved searches. See Exhibit 7.15.6-18, Running a Saved Search.
- (2) When you rerun a saved search query, the search uses the same parameters but returns updated results.
- (3) Follow these steps to run a saved search:

Step	Action
1.	Click Saved Search .
2.	Right-click on the selected search, click Run Search .

- (4) Before running the search, you can modify the search parameters by following these steps:

Step	Action
1.	Right-click on the selected search, click Edit .
2.	Edit the desired criteria.
3.	Click Search to rerun the search.

7.15.6.9.3
(09-23-2014)
Exporting Search Results

- (1) After completing a search, you can export the search results to Excel. You can export all of the results or only the specific columns. See Exhibit 7.15.6-19, Remove and Add Column Preferences, and Exhibit 7.15.6-20, Exporting to an Excel Worksheet.
- (2) Follow these steps to export a completed search:

Step	Action
1.	Right-click on the Search Results, click Export to CSV . This opens a second window.
2.	All columns will be selected by default. Select and remove any unwanted columns by clicking on the column name and clicking on the “Left Arrow” to remove.
3.	Click OK .
4.	A file download box will open, click Open . The results are displayed as an Excel spreadsheet.
5.	Right-click on Export to CSV.

- (3) To add column headers from the Preferences Display Settings menu:

Step	Action
1.	Click on the desired column attribute in the Select attributes to display box on the left.
2.	Click on the right arrow to move the desired attribute into the Selected attributes to display as column box on the right.

- (4) The new column header attribute moved from the “Select attributes to display” box on the left to the “Selected attributes to display” column box on the right.
- (5) Click **OK** to accept the changes.

7.15.6.10 (09-23-2014) Viewing TEDS Documents Using Optical Character Recognition (OCR)

- (1) You can search TEDS documents for words or phrases using Optical Character Recognition (OCR).
- (2) OCR is computer software that reads text from paper and translates images into a form the computer can manipulate. It translates handwritten or typed scanned text into language the machine understands and text that it can edit.
- (3) Once OCR is applied to a document, you can search for words or phrases using the binocular icon.

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Exhibit 7.15.6-1 (09-23-2014) Screen Selection Options

Screen Selection Options

The screenshot displays the TEDS (Tax Exempt Determination System) interface. At the top, there is a search bar and a navigation menu on the left. The main area shows the 'Inbox (TEDS)' screen with a table of messages. The table has columns for Subject, From, Date Received, Status, and Repository. The messages listed are:

Subject	From	Date Received	Status	Repository
Routee has Completed Review	TEDS	7/8/2014 2:24 PM		
Review Routing Slip	TEDS	7/8/2014 2:20 PM	Dormant	
Attachments : Routing Slip - EP-2013017-000011				
Routing Slip has been Terminated	TEDS	6/5/2014 4:09 PM		
Unlocked	TEDS	6/5/2014 4:09 PM		
Case Assignment	TEDS	5/2/2014 9:26 AM		
Case Assignment	TEDS	4/29/2014 10:49 AM		
Case Assignment	TEDS	4/16/2014 9:33 AM		
Abort Workflow	TEDS	4/16/2014 9:32 AM		
Routing Slip has been Terminated	TEDS	4/16/2014 9:32 AM		
Case Assignment	TEDS	4/16/2014 9:26 AM		
Case Assignment	TEDS	4/16/2014 9:20 AM		
Review Routing Slip	TEDS	4/14/2014 11:17 AM	Acquired	
Attachments : Routing Slip - EP-2010111-000084				
Review Routing Slip	TEDS	4/9/2014 5:13 PM	Acquired	
Attachments : Routing Slip - EP-2010105-000016				
Review Routing Slip	TEDS	4/9/2014 4:23 PM	Acquired	

At the bottom of the screen, there are buttons for 'View Messages' and 'Job Status'.

Exhibit 7.15.6-2 (09-23-2014)**TEDS Case File Main Screen****TEDS Case File Main Screen**

The screenshot displays the TEDS Case File Main Screen. At the top, there is a search bar with a magnifying glass icon and a dropdown menu labeled 'Advanced'. To the right of the search bar are links for 'User Profile', 'Logout', and a help icon. Below the search bar is a navigation tree on the left side, showing a hierarchy: 'TEDS : EPSP1' (expanded), 'Inbox', 'Saved Searches', 'My Cases', 'Cabinets', 'Reports', and 'Recently Viewed'. The main content area has a menu bar with 'File', 'Edit', 'View', 'Tools', 'Reports', and 'Role Delegation'. Below the menu bar, the path 'Cabinets/.../EP Cases/2007/02/EP-2011158-000004' is displayed, followed by the case number 'EP-2011158-000004'. To the right of the case number is a 'Starts With' search field and a 'Show Files and Folders' dropdown. Below this is a table with columns 'Name' and 'Order'. The table lists the following items:

Name	Order
Case Information	
Documents	100
Case Chronology	102
Case History	105
Payments	108
BRE Results	120
Related Cases	340

At the bottom of the screen, there are two buttons: 'View Messages' and 'Job Status'.

Exhibit 7.15.6-3 (09-23-2014) Removing Column Headers

Removing Column Headers

The screenshot shows a software window titled "Preferences: Display Settings: My Cases :". Inside, there are two main sections. The left section, "Select attributes to display:", contains a large empty box and a "Reset to defaults" button. The right section, "Selected attributes to display as column:", contains a list of attributes: Name, Applicant Name, Case Number, EIN, EDS Case Number, Control Date, and Expire/Rele Season Code. A context menu is open over the "Expire/Rele Season Code" item, with the option "Remove from list of selected attributes to display as columns" highlighted. Below the list is a "Closing Code" dropdown. At the bottom of the window are a help icon (?), and "OK" and "Cancel" buttons.

Exhibit 7.15.6-4 (09-23-2014)
Re-order Column Headers

Re-order Column Headers

The screenshot shows a software window titled "Preferences: Display Settings: My Cases :". Inside, there are two main sections. The left section, "Select attributes to display:", contains a large empty box and a "Reset to defaults" button. The right section, "Selected attributes to display as column:", contains a list of attributes: Name, Applicant Name, Case Number, EIN, EDS Case Number, Control Date, Expedite Reason Code (which is highlighted), Status, Event Code, and Closing Code. To the right of this list are up and down arrow buttons. A tooltip box is visible over the down arrow button, containing the text: "Move the item down in the list of selected attributes to display as columns". At the bottom left of the window is a help icon (?), and at the bottom right are "OK" and "Cancel" buttons.

Exhibit 7.15.6-5 (09-23-2014) Advanced Search Query Screen

Advanced Search Query Screen

The screenshot displays the 'Advanced Search Query Screen' within the TEDS application. The interface is divided into three main sections:

- Left Sidebar:** Contains a tree view with the following items:
 - TEDS : EPSP1
 - Inbox
 - Saved Searches
 - My Cases
 - Cabinets
 - Reports
 - Recently Viewed
- Central Search Area:**
 - Object Type:** A dropdown menu set to 'TEDS Case (teds_case)'.
 - Properties:** A section where a property 'EIN' is selected from a dropdown, followed by an equals sign and an empty input field. A 'Remove' button is to the right. Below this is a link 'Add another property'.
 - Date:** A dropdown menu set to 'Accessed'. Below it are radio buttons for 'Anytime' (selected), 'From', and 'To'. The 'From' and 'To' options have associated date input fields.
 - Size:** A dropdown menu set to 'Any Size'.
 - Save Search:** An unchecked checkbox.
 - Show Result Count Only:** An unchecked checkbox.
 - Buttons:** At the bottom right of the central area are 'Search', 'Clear', and 'Cancel' buttons.
- Right Sidebar:**
 - At the top, it has 'User Profile', 'Logout', and a help icon.
 - Below is a dropdown for 'Items per page:' set to '100'.
 - A table of results is displayed with two columns: a list of item names and a column of values (mostly '00').

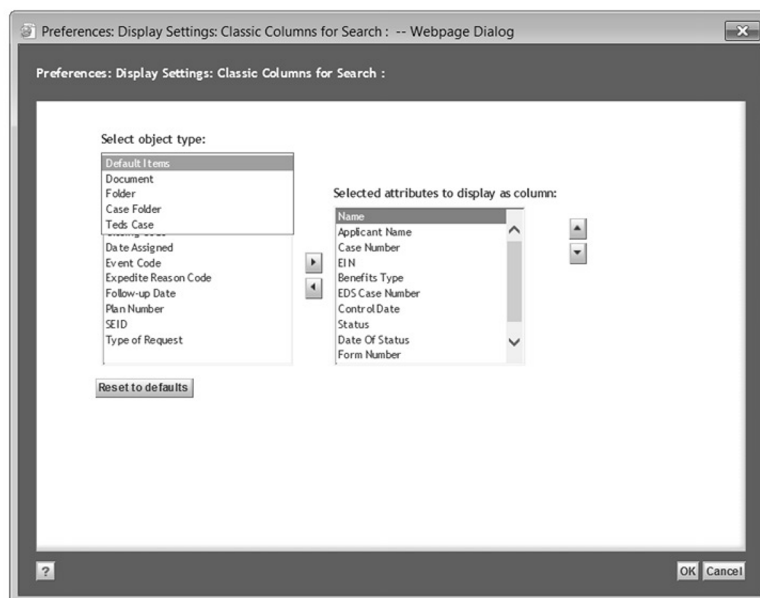
Exhibit 7.15.6-6 (09-17-2015)**Preferences: Display Settings: Classic Columns for Search****Preference: Display Settings: Classic Columns for Search**

Exhibit 7.15.6-7 (09-23-2014) Selecting Object Type

Selecting Object Type

The screenshot displays the 'Selecting Object Type' dialog box within the TEDS application. The interface includes a sidebar on the left with a tree view showing 'TEDS : EPSP1' and sub-items like 'Inbox', 'Saved Searches', 'My Cases', 'Cabinets', 'Reports', and 'Recently Viewed'. The main dialog area has the following components:

- Object Type:** A dropdown menu with 'TEDS Case (teds_case)' selected.
- Properties:** A list of properties including 'EP Case (teds_ep_case)', 'Routing Slip (teds_slip)', 'TEDS Case (teds_case)', 'TEDS Case folder (teds_case_folder)', 'TEDS Document (teds_doc)', 'TEDS EO Case (teds_eo_case)', and 'TEDS User (teds_user)'. A 'Remove' button is next to the list.
- Date:** Fields for 'From' and 'To' dates, each with a calendar icon.
- Size:** A dropdown menu set to 'Any Size'.
- Save Search:** An unchecked checkbox.
- Show Result Count Only:** An unchecked checkbox.
- Search Bar:** A text input field at the bottom left.
- Buttons:** 'Search', 'Clear', and 'Cancel' buttons at the bottom right.

On the right side of the application window, there is a 'User Profile' and 'Logout' link at the top, and a list of items with a 'Items per page: 100' dropdown and a 'Page' indicator.

Exhibit 7.15.6-8 (09-23-2014)
Searching by Properties' Field

Searching by Properties' Field

The screenshot displays the TEDS User Manual search interface. On the left, a navigation pane shows a tree structure with 'TEDS : EPSP1' expanded, containing 'Inbox', 'Saved Searches', 'My Cases', 'Cabinets', 'Reports', and 'Recently Viewed'. The main search area is titled 'Object Type: TEDS Case (teds_case)'. Below this, the 'Properties' section lists various fields for searching, including 'EIN', 'Entity Type', 'Event Code', 'Expedite Reason Code', 'Fee Code', 'form_revision', 'form_version', 'Form Number', 'Green Number', 'Group Number', 'In Care of', 'Lead Plan EIN', 'Manager of Case Owner', 'Mandatory Review', 'Model Plan Type', 'Name Control', 'New Law Indicator', 'Non-scannable Items', 'No User Fee Required', 'Package Number', 'Package Type', 'Payment Status', 'Pending Action', 'plan_category', 'Plan Name', 'Plan Number', 'POA1 Address', and 'POA1 CAF Number'. A dropdown menu is open for 'EIN', showing a 'dropdown List'. To the right of the search area, there are buttons for 'Search', 'Clear', and 'Cancel'. On the far right, a 'User Profile' and 'Logout' link are visible, along with a 'Items per page: 100' dropdown and a list of plan categories with their respective counts.

Plan Category	Count
ET BENEFIT	00
REFIT	00
TRIMMING SERV PS	00
TRIMMING SERV DB	00
S EMPORIUM	00
ENSION PLAN	00
IT PLAN	00
R DISGUISE RETIREMENT PLAN	00
ES RETIREMENT PLAN	00
RETIREMENT PLAN	00
ENSION PLAN	00
SION PLAN	00
EMENT PLAN	00
CATERING PENSION PLAN	00

Exhibit 7.15.6-9 (09-23-2014)

Adding Additional Property Values

Adding Additional Property Values

The screenshot displays the TEDS (Tax Exempt Determination System) interface. The main window is titled "Object Type: TEDS Case (teds_case)". It features a "Properties" section with two rows, each containing a dropdown menu (currently showing "EIN"), an operator ("=" and "-"), and a text input field. Below the properties is a "Date" section with a dropdown menu (currently showing "Accessed") and three radio buttons: "Anytime", "From", and "To". The "From" and "To" options have associated date input fields. There is also a "Size" section with a dropdown menu (currently showing "Any Size"). At the bottom of the main window are two checkboxes: "Save Search:" and "Show Result Count Only:". The interface includes a left sidebar with a tree view showing "TEDS : EPSP1" and its sub-items: "Inbox", "Saved Searches", "My Cases", "Cabinets", "Reports", and "Recently Viewed". The top navigation bar includes "User Profile", "Logout", and a help icon. The right sidebar shows a list of items with a "Items per page: 100" dropdown and a "Page" indicator.

Exhibit 7.15.6-10 (09-23-2014)
Removing Search Properties

Removing Search Properties

The screenshot displays the TEDS Case search interface. On the left is a navigation pane with links: TEDS : EPSP1, Inbox, Saved Searches, My Cases, Cabinets, Reports, and Recently Viewed. The main search area is titled "Object Type: TEDS Case (teds_case)". It features a "Properties" section with two rows of criteria: "EIN" followed by an equals sign and a blank field, and "EIN" followed by a less-than sign and a blank field. Each row has a "Remove" button. Below the properties is an "Add another property" link. The "Date" section has a dropdown menu set to "Accessed", with radio buttons for "Anytime" (selected) and "From" (with "To" date fields). The "Size" section has a dropdown menu set to "Any Size". At the bottom of the search area are checkboxes for "Save Search:" and "Show Result Count Only:". On the right side of the interface is a "User Profile | Logout ?" link and a list of search results. A tooltip "remove this property" is visible over the "Remove" button for the second property.

Object Type: TEDS Case (teds_case)

Properties:

- EIN = [] Remove
- EIN < [] Remove

[Add another property](#)

Date: Accessed

- ☒ Anytime
- ☐ From [] To []

Size: Any Size

Save Search: ☐

Show Result Count Only: ☐

remove this property

Search Clear Cancel

Exhibit 7.15.6-11 (09-23-2014)

Searching by Date

Searching by Date

The screenshot shows the TEDS search interface. On the left is a navigation pane with 'TEDS : EPSP1' and sub-items like 'Inbox', 'Saved Searches', 'My Cases', 'Cabinets', 'Reports', and 'Recently Viewed'. The main window is titled 'Searching by Date' and contains the following elements:

- Object Type:** TEDS Case (teds_case)
- Properties:** A list of properties with dropdown menus for selection. Currently, 'EIN' is selected for both the first and second properties, with '=' and '<' operators respectively. There are 'Remove' buttons for each property.
- Date:** A dropdown menu showing 'Accessed' as the selected date property.
- Size:** A dropdown menu showing 'Current Status Date' as the selected size property.
- Save Search:** A button to save the current search criteria.
- Show Result Count Only:** A checkbox to toggle the display of result counts.
- Search Buttons:** 'Search', 'Clear', and 'Cancel' buttons at the bottom right.

On the right side of the interface, there is a 'User Profile' and 'Logout' link, and a table listing various items with their counts. The table has columns for 'Items per page' (set to 100) and 'Pl'. The items listed include:

- ET BENEFIT 00
- NEFIT 00
- TRIMMING SERV PS 00
- TRIMMING SERV DB 00
- S EMPORIUM 00
- ENSION PLAN 00
- IT PLAN 00
- & DISGUISE RETIREMENT PLAN 00
- ES RETIREMENT PLAN 00
- RETIREMENT PLAN 00
- ENSION PLAN 00
- SION PLAN 00
- EMENT PLAN 00
- CATERING PENSION PLAN 00

Exhibit 7.15.6-12 (09-23-2014)
Searching by Size

Searching by Size

The screenshot displays the TEDS Case search interface. On the left is a navigation pane with a tree view containing 'Inbox', 'Saved Searches', 'My Cases', 'Cabinets', 'Reports', and 'Recently Viewed'. The main search area is titled 'Object Type: TEDS Case (teds_case)'. It features a 'Properties' section with two criteria: 'EIN' followed by an equals sign and a text input field, and 'and' followed by another 'EIN' criterion. Below this is a 'Date' section with a dropdown set to 'Accessed', radio buttons for 'Anytime' (selected) and 'From' (with 'To' date fields), and a 'Size' dropdown set to 'Any Size'. A 'Save Search:' section is also present. At the bottom of the main area are 'Search', 'Clear', and 'Cancel' buttons. On the right side, there is a 'User Profile' and 'Logout' link at the top, and a list of items with a 'Items per page: 100' dropdown and a 'Pl' column header. The list includes various plan types such as 'ET BENEFIT', 'REFIT', 'TRIMMING SERV PS', 'TRIMMING SERV DB', 'S EMPORIUM', 'ENSION PLAN', 'IT PLAN', 'B DISGUISE RETIREMENT PLAN', 'ES RETIREMENT PLAN', 'RETIREMENT PLAN', 'ENSION PLAN', 'SION PLAN', 'EMENT PLAN', and 'CATFRING PENSION PLAN', each with a numerical value in the 'Pl' column.

Exhibit 7.15.6-13 (09-23-2014) Query Results Count Only

Query Results Count Only

The screenshot displays the TEDS Query Results Count Only interface. The main window is titled "TEDS : EPSP1" and contains a search criteria builder. The "Object Type" is set to "TEDS Case (teds_case)". The "Properties" section shows two criteria: "EIN" and "EIN" with a logical connector of "and". The "Date" section is set to "Accessed" with a radio button for "Anytime". The "Size" section is set to "Any Size". There are checkboxes for "Save Search" and "Show Result Count Only", and a "Click to select" button. The results pane on the right lists various plan types with counts, such as "ET BENEFIT 00", "NEFIT 00", "TRIMMING SERV PS 00", "TRIMMING SERV DB 00", "S EMPORIUM 00", "ENSION PLAN 00", "IT PLAN 00", "DISGUISE RETIREMENT PLAN 00", "ES RETIREMENT PLAN 00", "RETIREMENT PLAN 00", "ENSION PLAN 00", "SION PLAN 00", "EMENT PLAN 00", and "CATRFRING PENSION PLAN 00".

Exhibit 7.15.6-14 (09-23-2014)**Sample Search Results/How to Begin Edit Search****Sample Search Results/How to Begin Edit Search**

Search Results

350+ Criteria: SELECT * FROM teds_ep_case WHERE [current_status contains '61'] Current time: July 09, 2014 02:42:02 PM EDT

Results for "61" in TEDS - 7/9/2014 2:41 PM

Name	Applicant Name	Case Number	EIN	EDS Case Number	Control Date	Expedite Reason Code	Status	Event Code	Closing Code
Case Information	SANDERSON TOWING	EP-2007290-000017	66-8997084		9/5/2007 12:00 AM	000 Not expedited	61		
Case Information	MAGIC SHOP DEFINED BENEFIT PLAN	EP-2007290-000004	66-8995019		9/5/2007 12:00 AM	000 Not expedited	61		
Case Information	NUMERO UNO INC	EP-2008080-000065	54-9997095	438080114	1/10/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	NUMERO UNO INC	EP-2008080-000053	54-9997095	438080115	1/10/2008 12:00 AM	000 Not expedited	61	UF	
Case Information	FIELDSTONE COLORADO CORPORATION	EP-2008220-000001	38-3350417	438220025	1/31/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	AQ PLAN CO	EP-2011158-000001	84-1110043	431158000	2/28/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	DUAL SLANT 4 REPAIR	EP-2008219-000055	53-8887081	438220020	3/5/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	FOSTER FABRICATION	EP-2008282-000044	53-8897085		3/21/2008 12:00 AM	000 Not expedited	61		
Case Information	ANCHORAGE FABRICATION	EP-2008309-000061	53-0897085	458310011	3/21/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	ALEUTIAN AUTO REPAIRS	EP-2008309-000062	53-0897081	438310019	3/21/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	GRAMBLING HOT HOLDINGS & SHIPPING	EP-2008282-000045	53-8897076		3/21/2008 12:00 AM	000 Not expedited	61		
Case Information	ST MATHEWS LOCAL 694 ACCOUNTS	EP-2008219-000040	53-8884080	438220009	5/29/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	WHITE LIGHTNING RAILWAYS	EP-2008219-000030	53-8884002	438220042	5/31/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	LORIS CHICKEN	EP-2008175-000048	99-9999048	438175048	6/19/2008 12:00 AM	000 Not expedited	61		

Exhibit 7.15.6-15 (09-23-2014) Methods of Saving a Search

Methods of Saving a Search

The screenshot displays the TEDS application interface. On the left is a navigation pane with a tree view containing: TEDS : EPSP1, Inbox, Saved Searches, My Cases, Cabinets, Reports, and Recently Viewed. The main window has a menu bar (File, Edit, View, Tools, Reports, Role Delegation) and a toolbar with buttons for Restart, Edit, Save, and Save Search. Below the menu bar, the 'Search Results' section shows the search criteria: '350+ Criteria: SELECT * FROM teds_ep_case WHERE [current_status contains '61']' and the current time: 'July 09, 2014 02:42:02 PM EDT'. The search results are presented in a table with the following columns: Name, Applicant Name, Case Number, EIN, EDS Case Number, Control Date, Expedite Reason Code, Status, Event Code, and Closing Code. The table lists 13 cases, all with a status of '61' and an expedite reason code of '000 Not expedited'. The cases include SANDERSON TOWING, MAGIC SHOP DEFINED BENEFIT PLAN, NUMERO UNO INC, NUMERO UNO INC, FIELDSTONE COLORADO CORPORATION, AQ PLAN CO, DUAL SLANT 4 REPAIR, FOSTER FABRICATION, ANCHORAGE FABRICATION, ALEUTIANS AUTO REPAIRS, GRAMBLING HOT HOLDINGS & SHIPPING, ST MATHEWS LOCAL 694 ACCOUNTS, WHITE LIGHTNING RAILWAYS, and LORIS CHICKEN.

Name	Applicant Name	Case Number	EIN	EDS Case Number	Control Date	Expedite Reason Code	Status	Event Code	Closing Code
Case Information	SANDERSON TOWING	EP-2007290-000017	66-8997084		9/5/2007 12:00 AM	000 Not expedited	61		
Case Information	MAGIC SHOP DEFINED BENEFIT PLAN	EP-2007290-000004	66-8995019		9/5/2007 12:00 AM	000 Not expedited	61		
Case Information	NUMERO UNO INC	EP-2008080-000065	54-9997095	438080114	1/10/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	NUMERO UNO INC	EP-2008080-000053	54-9997095	438080115	1/10/2008 12:00 AM	000 Not expedited	61	UF	
Case Information	FIELDSTONE COLORADO CORPORATION	EP-2008220-000001	38-3350417	438220025	1/31/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	AQ PLAN CO	EP-2011158-000001	84-1110043	431158000	2/28/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	DUAL SLANT 4 REPAIR	EP-2008219-000055	53-8887081	438220020	3/5/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	FOSTER FABRICATION	EP-2008282-000044	53-8897085		3/21/2008 12:00 AM	000 Not expedited	61		
Case Information	ANCHORAGE FABRICATION	EP-2008309-000061	53-0897085	458310011	3/21/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	ALEUTIANS AUTO REPAIRS	EP-2008309-000062	53-0897081	438310019	3/21/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	GRAMBLING HOT HOLDINGS & SHIPPING	EP-2008282-000045	53-8897076		3/21/2008 12:00 AM	000 Not expedited	61		
Case Information	ST MATHEWS LOCAL 694 ACCOUNTS	EP-2008219-000040	53-8884080	438220009	5/29/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	WHITE LIGHTNING RAILWAYS	EP-2008219-000030	53-8884002	438220042	5/31/2008 12:00 AM	000 Not expedited	61	EA	
Case Information	LORIS CHICKEN	EP-2008175-000048	99-9999048	438175048	6/19/2008 12:00 AM	000 Not expedited	61		

Exhibit 7.15.6-16 (09-23-2014)
Naming the Saved Search**Naming the Saved Search**

The screenshot displays the TEDS User Manual interface. A 'Save Your Search' dialog box is open, allowing the user to name and describe a saved search. The dialog box contains the following fields:

- Name:** Status 61
- Description:** 61
- Include Results:** ☐

The background shows a search results table with the following columns: Control Date, Expedite Reason Code, Status, Event Code, Closing Code, and Data. The table contains the following data:

Control Date	Expedite Reason Code	Status	Event Code	Closing Code	Data
9/5/2007 12:00 AM	000 Not expedited	61			
9/5/2007 12:00 AM	000 Not expedited	61			
1/10/2008 12:00 AM	000 Not expedited	61	EA		
1/10/2008 12:00 AM	000 Not expedited	61	UF		
1/31/2008 12:00 AM	000 Not expedited	61	EA		
2/28/2008 12:00 AM	000 Not expedited	61	EA		
3/5/2008 12:00 AM	000 Not expedited	61	EA		
3/21/2008 12:00 AM	000 Not expedited	61			
3/21/2008 12:00 AM	000 Not expedited	61	EA		
3/21/2008 12:00 AM	000 Not expedited	61	EA		
3/21/2008 12:00 AM	000 Not expedited	61			
5/29/2008 12:00 AM	000 Not expedited	61	EA		
5/31/2008 12:00 AM	000 Not expedited	61	EA		
6/19/2008 12:00 AM	000 Not expedited	61			

Exhibit 7.15.6-17 (09-23-2014)

Finding a Saved Search

Finding a Saved Search

The screenshot displays the TEDS application interface. On the left is a navigation pane with a tree view containing: TEDS : EPSP1, Inbox, Saved Searches (selected), My Cases, Cabinets, Reports, and Recently Viewed. The main window has a menu bar (File, Edit, View, Tools, Reports, Role Delegation) and a toolbar with Search, Restart, Edit, and Save buttons. Below the menu bar, the 'Search Results' section shows a search criteria: '350- Criteria: SELECT * FROM teds_ep_case WHERE [current_status contains '61']' and the current time: 'July 09, 2014 02:51:46 PM EDT'. It also indicates 'Results for "61" in TEDS - 7/9/2014 2:41 PM'. A pagination bar shows 'Page 1 of 4' and 'Items per page: 100'. The main area contains a table with the following data:

Date Of Status	SEID	Date Assigned	Form Number	Type of Request	Plan Name	Plan Number	Case Grade	Follow-up Date
2/13/2008 1:26 PM			5307	A	SANDERSON TOWING MONEY PURCHASE PLAN		11	
2/13/2008 1:42 PM			5307	I	THE MAGIC SHOP DEFINED BENEFIT PLALN		13	
3/10/2009 1:26 PM		3/10/2009 1:15 PM	5300	A	NUMERO UNO INC	002	00	
10/29/2008 8:18 AM			5300	A	NUMERO UNO INC	001	13	
4/13/2010 1:56 PM			5300	I	FIELDSTONE PROFIT SHARING PLAN	000	11	
6/7/2011 5:09 PM			5300	I	AQ PLAN CO MP PLAN	001	13	
1/10/2009 12:22 AM		8/20/2008 11:53 AM	5307	A	DUAL SLANT 4 REPAIR PENSION PLAN		00	
10/8/2008 1:58 PM			5307	I	FOSTER FABRICATION PENSION PLAN	001	11	
4/13/2010 1:55 PM			5307	I	ANCHORAGE FABRICATION PENSION PLAN	001	12	
4/13/2010 1:55 PM			5307	A	ALEUTLANS AUTO REPAIR PENSLON PLAN	003	00	
4/13/2010 1:56 PM			5307	I	GRAMBLING HOT HOLDINGS & SHIPPING RETIREMENT PLAN	005	11	
8/7/2008 12:14 PM			5307	A	ST MATHEWS LOCAL 694 ACCOUNTS PENSION PLAN	000	11	
8/7/2008 5:13 PM			5307	I	WHITE LIGHTNING RAILWAYS PENSION PLAN	000	12	
6/23/2008 7:16 PM			5307	I	LORIS CHICKEN MONEY PURCHASE PLAN		11	

At the bottom of the window, there are buttons for 'View Messages' and 'Job Status'.

Exhibit 7.15.6-18 (09-23-2014)
Running a Saved Search

Running a Saved Search

The screenshot displays the TEDS User Manual interface. At the top, there is a search bar and navigation tabs for 'Advanced' and 'Last Results'. Below the search bar, a sidebar on the left shows a tree view with options like 'Inbox', 'Saved Searches', 'My Cases', 'Cabinets', 'Reports', and 'Recently Viewed'. The main content area is titled 'Saved Searches' and features a table with the following columns: Name, Description, Modified, Sources, Last Count of Results, and Results Saved. The table lists several saved searches, including 'Status 61', 'EP Cases From 2014', '051214', 'status 21 test EPSP1', '74PC', 'status 74', 'status 74', 'ESP1 Save Searcj', '21', '5316', '5310A', '5310A', '5310 dr 3223', 'Unassigned Form 5307 grad...', 'rotten nasty poa', 'rotten nasty poa', and 'lori'. Each row provides details on the search name, description, modification date, source, and the number of results saved.

Name	Description	Modified	Sources	Last Count of Results	Results Saved
Status 61	61	7/9/2014 2:48 PM	TEDS	350	No
EP Cases From 2014	EP 2014	6/16/2014 2:46 PM	TEDS		No
051214		5/12/2014 10:40 AM	TEDS	11	No
status 21 test EPSP1		5/9/2014 11:55 AM	TEDS	11	No
74PC	74PC	4/8/2014 11:05 AM	TEDS	26	No
status 74		4/8/2014 10:58 AM	TEDS	11	No
status 74		4/8/2014 10:44 AM	TEDS	11	No
ESP1 Save Searcj		4/8/2014 10:11 AM	TEDS	195	No
21	21	4/2/2014 2:21 PM	TEDS	350	No
5316		12/15/2010 2:44 PM	TEDS		No
5310A	5310A	10/13/2010 2:39 PM	TEDS	23	Yes
5310A	5310A	11/4/2009 3:11 PM		0	No
5310 dr 3223	5310	2/17/2009 1:17 PM		0	No
Unassigned Form 5307 grad...	51 5307	1/14/2009 1:10 PM		0	No
rotten nasty poa	franklin cooper	8/14/2007 3:23 PM		0	No
rotten nasty poa	franklin cooper	8/14/2007 3:22 PM		0	No
lori	61	6/13/2007 2:05 PM		0	No

Exhibit 7.15.6-19 (09-23-2014)

Remove and Add Column Preferences

Remove and Add Column Preferences

The screenshot displays the TEDS (Tax Exempt Determination System) interface. A central dialog box titled "Remove and Add Column Preferences" is open. It features a "Select object type:" dropdown menu with "Default Items" selected. Below this is a "Dropdown List" button. To the right, a list of attributes is shown under the heading "Selected attributes to display as column:". The attributes are: Name, Applicant Name, Case Number, EIN, EDS Case Number, Control Date, Expedite Reason Code, Status, Event Code, and Closing Code. The "Name" attribute is currently selected. At the bottom of the dialog box, there is a "Reset to defaults" button and "OK" and "Cancel" buttons. The background interface includes a search bar at the top left, a sidebar with navigation links (Inbox, Saved Searches, My Cases, Cabinets, Reports, Recently Viewed), and a table of results on the right. The table has columns for "Plan Number", "Case Grade", and "Follow-up Date".

Plan Number	Case Grade	Follow-up Date
	11	
	13	
002	00	
001	13	
000	11	
001	13	
	00	
001	11	
001	12	
003	00	
005	11	
000	11	
000	12	
	11	

Exhibit 7.15.6-20 (09-23-2014)
Exporting to an Excel Worksheet

Exporting to an Excel Worksheet

Search

AdvancedLast Results

User ProfileLogout?

TEDS : EPSP1

Inbox

Saved Searches

My Cases

Cabinets

Reports

Recently Viewed

FileEditViewToolsReportsRole Delegation

Search Results

350+ Criteria: SELECT * FROM teds_ep_case WHERE [current_status contains '61'] Current time: July 09, 2014 02:51:46 PM EDT

Results for "61" in TEDS - 7/9/2014 2:41 PM

RestartEditSave

Name	Applicant Name	Case Number	EIN	EDS Case Number	Control Date	Expedite Reason Code	Status	Event Code	Closing Code	Da
Case Information	SANDERSON TOWING	EP-2007290-000017	66-8997084		9/5/2007 12:00 AM	000 Not expedited	61			
Case Information	MAGIC SHOP DEFINED BENEFIT PLAN	EP-2007290-000004	66-8995019		9/5/2007 12:00 AM	000 Not expedited	61			
Case Information	NUMERO UNO INC	EP-2008080-000065	54-9997095	438080114	1/10/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	NUMERO UNO INC	EP-2008080-000053	54-9997095	438080115	1/10/2008 12:00 AM	000 Not expedited	61	UF		
Case Information	FIELDSTONE COLORADO CORPORATION	EP-2008220-000001	38-3350417	438220025	1/31/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	AQ PLAN CO			3 431158000	2/28/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	DUAL SLANT 4 REPAIR			1 438220020	3/5/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	FOSTER FABRICATION			5	3/21/2008 12:00 AM	000 Not expedited	61			
Case Information	ANCHORAGE FABRICATION			5 458310011	3/21/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	ALEUTIAN'S AUTO REPAIRS			1 438310019	3/21/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	GRAMBLING HOT HOLDINGS &			6	3/21/2008 12:00 AM	000 Not expedited	61			
Case Information	ST MATHEWS LOCAL 694 ACCO			0 438220009	5/29/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	WHITE LIGHTNING RAILWAYS	EP-2008219-000030	53-8884002	438220042	5/31/2008 12:00 AM	000 Not expedited	61	EA		
Case Information	LORIS CHICKEN	EP-2008175-000048	99-9999048	438175048	6/19/2008 12:00 AM	000 Not expedited	61			

View Messages

Job Status