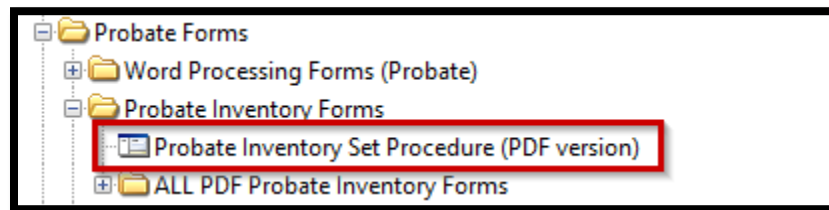


## New Probate Inventory Procedure for IowaDocs® 2017

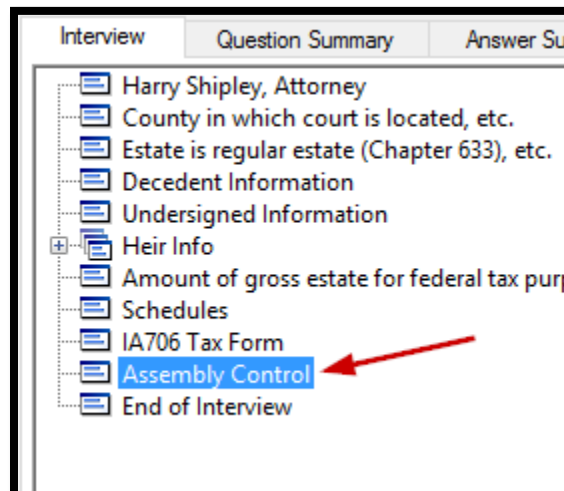
We have added a new entry into IowaDocs® 2017 to start a Probate Inventory matter. You will now find an entry within the Probate Forms/Probate Inventory forms called “Probate Inventory Set Procedure (PDF version)”\*. The icon will differ from what a user typically selects in the library. This new addition will allow users to start and adjust their set whenever they need and it will allow the user to select what forms they want to print/save during the process. So no longer will a user need to go through the cover page, schedules, and recap forms to only adjust schedule B. Below is a description of how to use this new procedure.

1. Select “Probate Inventory Set Procedure (PDF version)”\* from the library.



*NOTE: This is just an interview component, no template will result in this selection. You will pick what templates you want during this procedure.*

2. Fill out information like you normally would. Remember to save your answers promptly and often. The new option during the interview that you will want to focus on is the new entry called “Assembly Control”. This option is located right before the “End of Interview”



3. Within this interview dialog are your options of what template(s) you would like to work on. If you only want to fill out and save/print the “Cover Page” then only select that as your option and don’t check any of the other templates. If you only want to do the schedules you need, then only check the schedules. These options are predicated on what you answered previously so only those forms you indicated during the interview will be available. Those items in gray were not selected by you previously. Anytime you want need to make adjustments to any of the inventory templates – simply come back and open this procedure and check what you want to do. There is also an option for “Assemble all forms”.

Assembly Control

Select the forms you would like to assemble (save and/or print for now) for this probate inventory

Assemble all forms

Cover Page (Report and Inventory)

Iowa Inheritance/Estate Tax Return (IA 706)

Questionnaire and Recapitulation

Schedule A

Schedule B

Schedule C

Schedule D

Schedule E

Schedule E-1

Schedule F

Schedule G and H

Schedule I-1

Schedule I-2

Schedule J

Schedule K

*As you can see in the above image I only select 3 templates that I want to open once I am done with this interview procedure. They are the “Cover Page”, the “Iowa Inheritance/Estate Tax Return”, and the “Questionnaire and Recapitulation” templates.*

4. Once I “finish” this interview, the forms I selected will appear for processing. The master order that will occur is below – of course it depends what you select from above:
- Cover Page
  - Schedules
  - IA 706
  - Questionnaire/Recap

**\* Note: The word processing version of this procedure is in: Probate Forms/Word Processing Forms (Probate)/ Word Processing Forms (Probate Inventory) forms called “Probate Inventory Set Procedure (RTF version)”**