



# MANUAL TRANSMITTAL

Department of the Treasury  
Internal Revenue Service

2.11.1

JULY 20, 2023

## EFFECTIVE DATE

(07-20-2023)

## PURPOSE

- (1) This transmits revised IRM 2.11.1, IDRS Correspondence System, IDRS Correspondence.

## MATERIAL CHANGES

- (1) 2.11.1.1 updated the internal controls section.

## EFFECT ON OTHER DOCUMENTS

IRM 2.11.1, dated April 27, 2020, is superseded.

## AUDIENCE

LMSB, SB/SE, TE/GE, W&I.

Kaschit Pandya  
Acting, Chief Information Officer



2.11.1

IDRS Correspondence

## Table of Contents

2.11.1.1 Program Scope and Objectives

2.11.1.1.1 Background of IDRS Correspondence

2.11.1.1.2 Authority

2.11.1.1.3 Responsibilities

2.11.1.1.4 Program Management and Review

2.11.1.1.5 Program Controls

2.11.1.1.6 Terms and Acronyms

2.11.1.1.7 Related resources

2.11.1.1.8 IDRS Correspondence Scope

2.11.1.2 Correspondex Files

2.11.1.2.1 Correspondex Command Codes

2.11.1.2.2 Non-Letter Records

2.11.1.2.3 Reports and Exhibits

2.11.1.2.4 Special IDRS Letter (3064C or "CNOTE")

2.11.1.2.5 Resolving Letter Problems

2.11.1.2.6 Reference Manuals

2.11.1.2.7 Approved Letters Unacceptable for IDRS Use

2.11.1.2.8 Letter Technician Duties

2.11.1.2.8.1 TCC Letter Technician Duties

2.11.1.2.8.2 Service Center Letter Technician Duties

2.11.1.2.9 Consistency in formatting IDRS Letters

2.11.1.3 Correspondex FORM-LETTERS and NON-LETTER-RECORDs Definitions and Validity Requirements

2.11.1.3.1 Action Codes

2.11.1.3.2 Fill-ins

2.11.1.3.3 Letter Format

2.11.1.3.4 Letter Paging Fields

2.11.1.3.5 OMB Clearance

2.11.1.3.6 Selective Paragraphs

2.11.1.3.7 Input format for a LETTER-HEADER-LINE

2.11.1.3.7.1 Parts of LETTER-HEADER-LINE

2.11.1.3.8 Input Format for a NARRATIVE-LINE

2.11.1.3.9 Input Format for a FILL-IN-LINE

2.11.1.3.9.1 LETTER-LINE-NUM

2.11.1.3.9.2 FILL-IN-LINE-IND

2.11.1.3.9.3 NUM-OF-FILL-IN-CD-SECTIONS

---

2.11.1.3.9.4	SELECTIVE-PARA-CD	
2.11.1.3.9.5	FILL-IN-CD-SECTION	
2.11.1.3.9.5.1	PARTS OF THE FILL-IN-CD-SECTION	
2.11.1.4	CTS Background	
2.11.1.4.1	General, CTS	
2.11.1.4.2	General, Text Editor	
2.11.1.4.3	Logging On the Terminal	
2.11.1.4.4	Assigning Correspondex Files	
2.11.1.4.5	CTS Commands	
2.11.1.4.6	Text Editor Commands	
2.11.1.4.7	Logging Off the Terminal	
2.11.1.5	Special TCC Processing	
2.11.1.5.1	Retrieving FORM-LETTERS from Correspondex Files	
2.11.1.5.2	Validating Letter Input	
2.11.1.5.3	Correspondex Action Records	
2.11.1.5.4	Updating OMB Clearance Records	
2.11.1.5.5	Monthly TCC Updates	
2.11.1.5.6	TCC Utility Programs	
2.11.1.5.7	TCC Quarterly Statistical Reports	
2.11.1.6	Special Service Center Processing	
2.11.1.6.1	Retrieving FORM-LETTERS from Correspondex Files	
2.11.1.6.2	Validating Letter Input	
2.11.1.6.3	Correspondex Action Records	
2.11.1.6.4	Service Center Versions of "C" Letters.	
2.11.1.6.5	Updating OMB Clearance Records	
2.11.1.6.6	Updating Preaddressee Address Records	
2.11.1.6.6.1	INPUT FIELDS FOR PREADDRESS RECORDS	
2.11.1.6.7	Updating Return Address Records	
2.11.1.6.7.1	INPUT FIELDS FOR RETURN-ADDRESS-UPDATE-RECORDS	
2.11.1.6.8	Updating Signature Title Records	
2.11.1.6.8.1	Update Fields for Signature Title Records	
2.11.1.6.9	Updating Special Insert Records	
2.11.1.6.9.1	INPUT FIELDS FOR SPECIAL-INSERT-UPDATE RECORDS	
2.11.1.6.10	Updating Employee-Num-Sig-Title-Records	
2.11.1.6.11	Generating a SPECIAL-LETTER-USE-REPORT (Run CRX62)	
2.11.1.6.12	Monthly Service Center Updates	
2.11.1.6.13	Daily Service Center Programs	
2.11.1.6.14	Service Center Utility Programs	
2.11.1.7	Creating the SERP copy Introduction (formerly IDRS Correspondex Document 6548)	
2.11.1	Internal Revenue Manual	Cat. No. 28244Y (07-20-2023)

- 2.11.1.7.1 Files used to create the SERP copy
- 2.11.1.7.2 Creating or Updating Records on the MASTER-COMMENT-FILE
- 2.11.1.7.3 RUN CRX09S (At TCC this run is CRX09N)
- 2.11.1.8 Creating Knowledge Base groups and rules
  - 2.11.1.8.1 Group code breakdown
  - 2.11.1.8.2 Rules breakdown
  - 2.11.1.8.3 rule symbols are:
  - 2.11.1.8.4 KNOWLEDGE BASE ERROR MESSAGES

Exhibits

- 2.11.1-1 Character Reduction for Narrative Fill-ins
- 2.11.1-2 Chart for Fill-in Coding.
- 2.11.1-3 Codes Indicating Letter Origin
- 2.11.1-4 Error Messages.
- 2.11.1-5 Example of a letter in SERP format
- 2.11.1-6 Input Format. FILL-IN-LINE.
- 2.11.1-7 Input Format. LETTER-HEADER-LINE.
- 2.11.1-8 Input Format.NARRATIVE-LINE
- 2.11.1-9 Input Format. OMB-CLEARANCE-UPDATE-RECORD.
- 2.11.1-10 Input Format. PREADDRESSEE-UPDATE-RECORD-1.
- 2.11.1-11 Input Format. PREADDRESSEE-UPDATE-RECORD-2.
- 2.11.1-12 Input Format. PREADDRESSEE-UPDATE-RECORD-3.
- 2.11.1-13 Input Format.RETURN-ADDRESS-UPDATE-RECORD.
- 2.11.1-14 Input Format. SIGNATURE-TITLE-UPDATE-RECORD.
- 2.11.1-15 Input Format. SPECIAL-INSERT-UPDATE-RECORD.
- 2.11.1-16 Input Format. EMPLOYEE-NUM-SIG-UPDATE-REC.
- 2.11.1-17 LETTER-ERROR-CDs
- 2.11.1-18 CTS Commands
- 2.11.1-19 Text Editor Commands
- 2.11.1-20 SERP copy (formerly Document 6548)
- 2.11.1-21 Example of Notes in WKFILE
- 2.11.1-22 Screen display terminal responses and error messages from CRX07
- 2.11.1-23 Screen display messages from CRX08
- 2.11.1-24 Error messages in file ERR-FILE from CRX08
- 2.11.1-25 Input Format. FILL-IN-LINE.
- 2.11.1-26 Input Format. NARRATIVE-LINE.



2.11.1.1  
(07-20-2023)  
**Program Scope and Objectives**

- (1) This IRM section provides an overview of the IDRS Letter System used to generate letters.
- (2) **Purpose:** This IRM provide information and instructions to the Tennessee Computing Center (TCC) and Service Center technicians involved in the preparation, revision, and processing of IDRS letters. This includes letters created for national use as well as local letters, Office of Management and Budget (OMB) Clearance Records, Preaddress Addresses, Return Addresses, Signature Titles, and Special Inserts.
- (3) **Audience:** Employees at The Office of Taxpayer Correspondence (OTC), the Service Centers and Computing Centers that use the IDRS Letter System.
- (4) **Policy Owner:** The Chief Information Officer (CIO) is responsible for overseeing all aspects of our systems.
- (5) **Program Owner:** Accounts Services Branch (an organization within Application Development, Customer Service Domain).
- (6) **Primary Stakeholders:** The Office of Taxpayer Correspondence (OTC) and technicians at the Service Centers and Computing Centers involved in the preparation, revision, and processing of IDRS letters.
- (7) **Program Goals:** This IRM provides the fundamental knowledge and procedural guidance for employees who work preparing, revising, and processing IDRS letters.

2.11.1.1.1  
(01-01-2008)  
**Background of IDRS Correspondence**

- (1) The IDRS Letter System is the IDRS computer system used to generate letters.  
The system has five major files:
  - a. the MSC-MASTER-LETTER-FILE (MMLF) — a file maintained at TCC containing all FORM-LETTERS which are used nationally ("C" letters).
  - b. the NATIONAL-MASTER-LETTER-FILE (NMLF) — a file maintained at the Service Centers containing all FORM-LETTERS which are used nationally ("C" letters).
  - c. the SC-MASTER-LETTER-FILE (SMLF) — a file maintained at each Service Center containing all current FORM-LETTERS-SC.
  - d. the OMB-CLEARANCE-NUMBER-FILE — a file maintained at TCC containing OMB-CLEARANCE-NUMBER-RECORDs.
  - e. the CRRSPNDX-NON-LETTER-FILE (CNLF) — a file maintained at each Service Center containing all non-letter data that is unique to that center.
- (2) The MMLF is updated monthly at TCC. This update is copied to tape and sent to each of the service centers. The updated MSC-MASTER-LETTER-DISC is then merged with the SC-MASTER-LETTER-DISC to create the SEQUENCED-MASTER-LETTER-DISC. This tape is used to create the CRRSPNDX-LETTER-VALIDITY-FILE, which is used to validate real-time input.
- (3) If there are changes made to the OMB-CLEARANCE-NUMBER-RECORDs, the OMB-CLEARANCE-UPDATE-FILE (a tape file) will be shipped at the same time as the monthly NMLF.
- (4) The SERP copies are also maintained by TCC. They are printed copies of all the letters currently on the MMLF with a cross reference list of each letter by

subject (the Functional Index). To access SERP on the web - <http://serp.enterprise.irs.gov/> SERP was formally known as the IDRS Correspondex Document 6548.

- (5) The IDRS Correspondex also contains the OMB Clearance Index. This is a cross reference list matching a Federal Tax Form with its assigned OMB Code, OMB clearance number and approval expiration date. If a letter is a "Document Perfection" letter (this is indicated on the SERP exhibit for the letter) it will be necessary to input, on the CC LPAGE screen, the OMB code of the Federal Tax Form being perfected. Camera copies of change pages are furnished to National Office Facilities Management, who in turn print and distribute these changes to all IDRS letter users. See Exhibit 2.11.1-5 for an example of a letter exhibit in SERP.
- (6) Correspondex copies of FORM-LETTERS-SC and NON-LETTER-RECORDs (addresses, signature titles and special inserts) are printed and distributed by the service center to IDRS users in their particular Region.

2.11.1.1.2  
(07-20-2023)  
**Authority**

- (1) This IRM provide information and instructions to the Tennessee Computing Center (TCC) and Service Center technicians involved in the preparation, revision, and processing of IDRS letters. This includes letters created for national use as well as local letters, Office of Management and Budget (OMB) Clearance Records, Preaddress Addresses, Return Addresses, Signature Titles, and Special Inserts.

2.11.1.1.3  
(07-20-2023)  
**Responsibilities**

- (1) The Chief Information Officer (CIO) is responsible for overseeing all aspects of our systems.

2.11.1.1.4  
(07-20-2023)  
**Program Management and Review**

- (1) This program is governed by OTC and technicians at the Service Centers and Computing Centers.

2.11.1.1.5  
(07-20-2023)  
**Program Controls**

- (1) The IDRS Letter System is the IDRS computer system used to generate letters for the five major master files: MMLF,NMLF,SMLF,CNLF, and OMB-CLEARANCE-NUMBER-FILE.

2.11.1.1.6  
(07-20-2023)  
**Terms and Acronyms**

- (1) For a comprehensive list of IRS acronyms please refer to the *Acronyms Database (irs.gov)* . The table lists commonly used acronyms and their definitions

Acronym	Definition
CES	Correspondex Expert System
CLVF	Correspondex Letter Validity File
CNLF	Correspondex Non-Letter File
CPS	Correspondence Production Services
CRX	Correspondex
CRXL	Correspondex Letter File



EIM	Electronic Imaging Management
EOD	End of Day
F-I	Fill-in
IAT	Integrated Automation Technology
IATLT	Integrated Automation Technology Letter Tool
LIFO	Last In First Out
LB&I	Large Business and International
MFT	Master File Tax
NAP	National Account Profile
OMB	Office of Management and Budget
PARA	Paragraph
POA	Power of attorney
PUB	Publication
QR	Quality Review
RA	Return Address
SB/SE	Small Business Self Employed
SERP	Servicewide Electronic Research Program
TE/GE	Tax Exempt and Government Entities
TIF	Taxpayer Information File
TIN	Taxpayer Identification Number
TP	Taxpayer
TXPD	Tax Period
W&I	Wage and Investment
XMIT	Transmit (Enter Key)

2.11.1.1.7  
(07-20-2023)

#### Related resources

- (1) <http://serp.enterprise.irs.gov>

2.11.1.1.8  
(01-01-2008)  
**IDRS Correspondence  
Scope**

- (1) The provisions of this section apply to the technical aspects of the IDRS correspondence operation and related procedures or documents. Most procedures are covered in detail; however, many situations may arise which, while not covered specifically, can be handled by adapting the instructions to the individual situations.
- (2) This Section has been prepared as a basic guide to assist in the performance of the IDRS correspondence functions in the service centers and TCC, and no attempt is made to state where, how, or by what organizational unit the IDRS

correspondence will be initiated. All references of this nature in this Section are intended to be directed to the IDRS Correspondence technical functions.

- (3) Subsections See IRM 2.11.1.2.8. (Letter Technicians Duties) and See IRM 2.11.1.6.4. (Service Center Versions of "C" Letters) make reference to changing the content of national letters as necessary to meet local or regional conditions. This manual provides instructions on how such changes can be made. For the service's position on when such changes can be made, see IRM 21.3.3, Incoming and Outgoing Correspondence/Letters.

### 2.11.1.2 (01-01-2000)

#### **Correspondence Files**

- (1) CRRSPNDX-ACTION-RECORD-FILE (CARF) — a file containing a record of all revisions, deletions, and additions to the MMLF/NMLF or SMLF. This file is produced by Program CRX52 at TCC or Program CRX5C at the Service Centers and is input to Program CRX53 or CRX5D.
- (2) CRRSPNDX-LETTR-VALIDITY-FILE (CLVF) — a file containing the validity data of all FORM-LETTERS currently available for real-time processing of CC LPAGE. The validity file is created at the same time the MSC-MASTER-LETTER-DISC and the SC-MASTER-LETTER-DISC are merged.
- (3) CRRSPNDX-LETTER-USE-FILE — a file containing daily use counts for each letter on the SEQUENCED-MASTER-LETTER-DISC during the current quarter and cumulative counts for each letter for all prior quarters. A tape copy of this file will be sent to TCC by each service center at the end of each quarter for statistical purposes.
- (4) CRRSPNDX-NON-LETTER-FILE (CNLF) — a file containing the validity data of all NON-LETTER-RECORDs currently available for real-time processing of CC's LETER and LPAGE. This file consists of OMB-CLEARANCE-NUMBER-RECORDs from TCC, and all addresses, signature titles, special inserts and employee number signature title records provided by the service center.
- (5) CRRSPNDX-QUALITY-REVIEW-FILE (CORF) — a file containing new or revised FORM-LETTERS after they have been edited and validated. It also contains FORM-LETTERS-TCC or FORM-LETTERS-SC which have been deleted from the NMLF or the SMLF.
- (6) CRRSPNDX-TERMINAL-WORK-FILE (CTWF) — a work file used in updating FORM-LETTERS-TCC or FORM-LETTERS-SC with the text editor tasks. This file stores individual FORM-LETTER-LINES as a group for editing and validation.
- (7) CRX-ERRORS — a file containing ERROR-MESSAGES written from Program CRX51 at TCC or Program CRX5B at the Service Centers during validation.
- (8) MSC-MASTER-LETTER-FILE (MMLF) — a file containing all FORM-LETTERS used nationally ("C" letters). Each month the MMLF is updated with new, revised or deleted "C" letters. This update is duplicated and sent to each of the service centers. It is then merged with the SC-MASTER-LETTER-DISC to create the SEQUENCED-MASTER-LETTER-DISC which will be used to update the CLVF.
- (9) NATIONAL-MASTER-LETTER-FILE (NMLF) — a file containing all FORM-LETTERS used nationally ("C" letters). This file is the Service Centers copy of the MMLF.

- (10) NON-LETTER-UPDATE-FILE (CRX-CNLF-UPDT) — A file containing all NON-LETTER-UPDATES for a given update cycle. NON-LETTER-UPDATES are input through the IAP Terminal. The NON-LETTER-UPDATE-FILE is input to Program CRX56 in order to update the CNLF.
- (11) OMB-CLEARANCE-NUMBER-FILE — a file containing OMB-CLEARANCE-NUMBER-RECORDs. This file is updated only when there are changes to OMB-CLEARANCE-NUMBERs, or OMB-EXPIRATION-DTs for Federal Tax Forms. These updates are then copied to the OMB-CLEARANCE-UPDATE-FILE as OMB-CLEARANCE-UPDATE-RECs-TCC. If any changes were made to the file the OMB-CLEARANCE-UPDATE-FILE will be sent to the Service Centers at the same time as the monthly NMLF.
- (12) SC-MASTER-LETTER-FILE (SMLF) — a disk file maintained at the service center containing any authorized IDRS letters to be used by the servicing area of that service center. This file is updated, when necessary, by the service center letter technician. It is then merged with the NMLF to produce the SEQUENCED-MASTER-LETTER-DISC.
- (13) SEQUENCED-MASTER-LETTER-DISC — the merged master letter file used in end-of-day processing to produce taxpayer letters. The letters on this file are in ascending sequence by FORM-LETTER-NUM. This file is not accessed when updating letters.

## 2.11.1.2.1

(01-01-2008)

**Correspondex Command Codes**

- (1) Requests for computer-generated letters are input via the Correspondex command codes. They are validated using the CLVF and CNLF at the time of input. When all fields are correct, a formatted request is written to a disc for end-of-day IDRS letter processing.
- (2) The following command codes are used to generate IDRS letters during real-time processing:
  - a. LETER — this command code extracts name and address data from the TAXPAYER-INFORMATION-FILE (TIF) and/or the CNLF.
  - b. LETUP — this command code is used to generate a command code LETED screen. If a form letter is input, CC LETUP extracts the RESTRICT-AVAILABILITY-INDICATOR, BYPASS-QR-INDICATOR and the NUM-OF-COPIES from the CLVF and displays them on the command code LETED screen.
  - c. LETED — this command code is used to change the RESTRICT-AVAILABILITY-INDICATORS and BYPASS-QR-INDICATORS and NUM-OF-COPIES of particular form letters on the CLVF.
  - d. LPAGE — this command code is used to enter all data necessary to identify a particular TAXPAYER-LETTER and to set up the contents of the letter by entering the salutation, Selective Paragraph codes, Signature Title code, and Fill-in content. Once all data has been input, CC LPAGE validates the entire input screen. If all inputs are valid, a GEN-LTR-RQST-REC and a QR-DATA-REC are formatted and written to the GENDATA tape. If tax module information is input, it accesses the Centralized Authorization File (CAF) and the Reporting Agents File (RAF) and generates copies of the valid letter request for all authorized representatives. A user may view a copy of the finished letter on the screen by entering a Y at the "VIEW>" prompt.
  - e. LPAGD — this command code deletes a letter request input during the same day's real-time processing.

- (3) For further information concerning IDRS Correspondence command codes refer to IRM 2.4, Section 6, Command Codes LETER, LPAGE, LPAGD, LETUP, LETED, LREVIEW, and LLIST.

2.11.1.2.2  
(01-01-2003)

#### Non-Letter Records

- (1) The following records are stored on the CNLF data base file:
- (2) OMB-CLEARANCE-NUMBER-REC — a record which provides the OMB clearance number and the optional approval expiration date of a Federal Tax Form. This record is identified by a two character alpha or numeric code ([slash]01–99 or AA–ZZ in upper or lower case). If the letter involves a document perfection, IDRS terminal operators must input the OMB code of the Federal Tax Form being perfected with CC LPAGE screen.
- (3) PA-NAME-AND-ADDR-REC — the address of a government agency, a bank, or another IRS office with which Service Center personnel may have frequent correspondence. This address is identified by a one character alphabetic code (A–Z). If the letter is designated as a preaddressed letter, entry of the code by the terminal operator will cause the corresponding pre addressee address to be printed as the inside address of the letter.
- (4) RETURN-ADDRESS-REC — an address which will be used by the taxpayer in responding to correspondence. This address is identified by a two character alpha-numeric code ([slash]01–99 or AA–ZZ). Using CC LPAGE, terminal operators may input a RETURN-ADDRESS-CD to select a return address from the CNLF to be printed as the return address of a letter or for a specially-coded fill-in within the body of the letter.
- (5) SIGNATURE-TITLE-REC — a record which contains the SIGNATURE-NAME, SIGNATURE-TITLE, and/or LASER-SIGNATURE-CD to be used in signing IDRS letters. This information is identified by a two character alpha-numeric code ([slash][slash]01–99 or AA–ZZ). Terminal operators must select a signature title from the file to be printed on the letter with CC LPAGE. The two types of signature title codes are:
- Alpha codes AA–ZZ or numeric 01–99— a two line SIGNATURE-NAME and SIGNATURE-TITLE will print on the letter. A LASER-SIGNATURE-CD is required.
  - Numeric code 00 — associated with a blank SIGNATURE-TITLE. To be used only for pre-addressed letters.
- (6) SPECIAL-INSERT-REC — a record which provides frequently used Fill-in data (titles of Tax Forms, telephone numbers, names etc.). SPECIAL-INSERTS may be used for Fill-ins if the validity of the SPECIAL-INSERT-RECORD matches the validity of the Fill-in requested. SPECIAL-INSERT data is identified by a two character alphabetic code (AA–ZZ).
- Maximum length of a SPECIAL-INSERT-REC is 34 characters of data.
  - The data must be followed by a FILL-IN-DELIMITER (“”).
- (7) EMPLOYEE-NUM-SIG-TITLE-REC — a record containing a two character alpha-numeric code which corresponds with one of the SIGNATURE-TITLE-CDs in the SIGNATURE-TITLE-RECs. This SIGNATURE-TITLE-CD is extracted by CC LETER using the third, fourth and fifth digits of the IDRS employee number as a key to identify this record type on the NON-LETTER-FILE (CNLF).

2.11.1.2.3  
(01-01-2008)  
**Reports and Exhibits**

- (1) Form Letter Exhibit — a listing of the contents of each letter being added to or revised on the Master Letter Files. Each letter format includes validity information necessary to enable the letter technician to review the letter updates for accuracy. For example, all information keyed into the LETTER-HEADER-LINE, is listed at the top of the letter; fill-in validity data is shown to the right of the NARRATIVE-LINE for which it is coded. All changes are indicated by an asterisk to the left of the item changed or added. Letters are printed in FORM-LETTER-NUM order.
- (2) Form Letter List — a list that reflects the FORM-LETTER-NUM and the action code for each FORM-LETTER being added, revised, or deleted in the update of the Master Letter File and serves as an index to the Form Letter Exhibit.
- (3) SERP (Formerly IDRS Correspondence Document 6548) — web pages containing exhibits of all “C” letters coded with information necessary for terminal input of letters. It must accurately reflect what is currently on the IDRS letter file(s).
- (4) Index — issued with SERP transmittals. It is a list categorized in numeric and functional sequence to provide system users with a quick method of locating a particular letter with a brief description of the letter content. It also contains the OMB Clearance Index to provide system users with a quick method of obtaining the OMB code of a particular Federal Tax Form.
- (5) LETTER-ERROR-LIST — a listing of any letter request failing to meet validity checks during end-of-day processing. The FORM-LETTER-NUM and the LETTER-ERROR-CD are printed to the left of the GENERATED-LETTER-REQUEST-REC. See Exhibit 2.11.1-17. When an error record appears, it will be reviewed and interpreted for the reject reason. The requester will be notified why the request was invalid and instructed to re-input the letter.
- (6) LETTER-USE-REPORTS — reports that provides volume counts for each FORM-LETTER-NUM present on the CRRSPNDX-LETTER-USE-FILE. If a letter is deleted from the SEQUENCED-MASTER-LETTER-DISC it will continue to list on the LETTER-USE-REPORT with an asterisk until the end of the current quarter or until the letter is added again to the file. If this report is the output of the daily running of Program CRX[slash]3, the DAILY-LETTER-USE-REPORT provides a daily count and a cumulative count for the current quarter for each FORM-LETTER. When produced as the output of Program CRX62, the SPECIAL-LETTER-USE-REPORT contains volume counts for the type of report requested:
  - DATE — provides cumulative counts for each LETTER-USE-COUNT which falls between the requested dates for all FORM-LETTERS on the CRRSPNDX-LETTER-USE-FILE.
  - QUARTER - provides cumulative quarter counts for each FORM-LETTER on the CRRSPNDX-LETTER-USE-FILE for the current and all prior quarters.
  - COUNT — provides cumulative quarter counts for each FORM-LETTER on the CRRSPNDX-LETTER-USE-FILE which matches the volume specified. Cumulative quarter counts are provided for the current and all prior quarters if a volume match is made on any quarter. This report is useful in determining letters with zero volume or with high volume. It is also useful in providing historical volume information for FORM-LETTERS.

- (7) NON-LETTER-EXHIBITS — a listing of the non-letter records being added or revised on the CNLF. These records are formatted and listed with their respective code to allow the letter technician to review them for accuracy. The records are listed alphabetically by type and in alphanumeric sequence within each type.
- (8) OMB Code List — a list used by TCC to keep track of the alphanumeric OMB codes assigned to Federal Tax Forms.
- (9) SELECTED-LETTER-ERROR-LIST — a listing of any SELECTED-LETTER-REQUEST failing to meet validity checks or if no FORM-LETTER-NUM match is found on the SEQUENCED-MASTER-LETTER-DISC. The FORM-LETTER-NUM of SELECTED-LETTER-REQUEST is printed on the list along with the literal, “NO FORM-LETTER MATCH FOUND FOR THIS SELECTED REQUEST”.

2.11.1.2.4  
(01-01-2008)  
**Special IDRS Letter  
(3064C or “CNOTE”)**

- (1) 3064C Letter — a special IDRS letter on the NMLF. This letter is for use when a short narrative reply specifically tailored to the individual taxpayer is needed. Use of this letter is an option determined by local management. This letter may be used in cases where a tax examiner’s handwriting is such that preparation of a handwritten Quick Note (see IRM 21.3.3 Incoming and Outgoing Correspondence/Letters) would not be appropriate.

2.11.1.2.5  
(01-01-2008)  
**Resolving Letter  
Problems**

- (1) Document the problem — When IDRS letter problems are discovered and reported from service center or district office functional areas, the service center IDRS Letter Technician will document the problem and perform the following procedures:
  - a. The Letter Technician will review the problem to determine if it is a local service center problem or is national in scope. If there is any doubt, it should be treated as a national problem.
  - b. Review the FORM-LETTER-EXHIBITS and the SERP copy to determine if the problem is on the MSC-MASTER-LETTER-DISC or the IDRS Correspondex. If both agree, discuss the problem with a CSA.
  - c. If the CSA believes the problem to be of a programming or systemic nature, note the problem, make a copy for your files, and report it to the National Office Correspondex Programming Team immediately.
  - d. If the problem deals with “C” letter content or format, note the problem, make a copy for your files, and notify the TCC Correspondex Unit immediately.
  - e. If the problem deals with service center letter content or format, note the problem, list the steps you have taken to resolve it, and file the problem documentation.

2.11.1.2.6  
(01-01-2000)  
**Reference Manuals**

- (1) The following references should be made readily available to Letter Technicians involved in Correspondex maintenance:
  - a. IRM 2.4 IDRS Terminal Input, Section 6.
  - b. Functional Specifications Package 1.05.09.00
  - c. IRM 21.3.3, Correspondence.
  - d. The UNISYS Text Editor Manual.
  - e. The UNISYS CTS Manual (UP–7940)
  - f. The UNISYS IPF Manual



2.11.1.2.7  
(01-01-2000)  
**Approved Letters  
Unacceptable for IDRS  
Use**

- (1) The TCC Letter Technician will receive the approved IDRS letters from Notice Clarity and review them for adaptability into the system. Letters not meeting the system criteria will be returned to Notice Clarity, annotating reasons and recommendations.
  - a. IDRS "C" Letters received from Notice Clarity may be determined not to fit within the IDRS format limitations. The processing of these letters should be discontinued and the project analyst notified.
  - b. Refer to FORM 1767 attached to the letter to determine who the responsible project analyst is and the contact telephone number. Contact the analyst and explain the limitation(s) exceeded.
  - c. If the project analyst requests recommendations to make the letter compatible for IDRS use, describe what change(s) should be made. If the change requires a change in letter content, it will have to be recirculated through Notice Clarity for approval. If the change does not require such action, make the necessary change after the analyst gives you concurrence in writing. File the note in the office letter file.

2.11.1.2.8  
(01-01-2000)  
**Letter Technician Duties**

- (1) The duties of Letter Technicians can be divided between the National letter technicians at TCC and User Support Specialists in each service center.

2.11.1.2.8.1  
(01-01-2008)  
**TCC Letter Technician  
Duties**

- (1) Review and prepare IDRS letters for terminal input.
- (2) Provide the Service Center Letter Technicians with:
  - Copies of the MSC-MASTER-LETTER-DISC, OMB-CLEARANCE-UPDATE-FILE and the SERP copies.
  - Advance draft copies to be used as notifications of impending letter changes.
  - Schedule of periodic updates.
  - Copies of FORM-LETTER-LIST-TCC & FORM-LETTER-EXHIBITS-TCC.
- (3) Prepare yearly schedules which indicate:
  - Cut-off dates for inclusion of changes in IDRS Correspondex and the MSC-MASTER-LETTER-DISC.
  - IDRS Correspondex and MSC-MASTER-LETTER-DISC and OMB-CLEARANCE-UPDATE-FILE shipments.
- (4) Update the NMLF and OMB-CLEARANCE-NUMBER-FILE with new and revised FORM-LETTERS and OMB-UPDATE-RECs.
- (5) Prepare a camera copy of a new or revised FORM-LETTER and submit it with Form 1767 to Publishing Services.
- (6) Submit to Publishing Services any change to the OMB-CLEARANCE-INDEX in the IDRS Correspondex document.

2.11.1.2.8.2  
(01-01-2000)  
**Service Center Letter  
Technician Duties**

- (1) Update the SMLF and the CRRSPNDX-NON-LETTER-FILE with new or revised FORM-LETTERS and NON-LETTER-RECORDs. Test these updates as necessary.
- (2) Update the NMLF and the CRRSPNDX-NON-LETTER-FILE with revisions to "C" Letters or OMB-CLEARANCE-NUMBER-RECORDs. Any revisions to these files must be approved by the TCC Correspondex Unit.

- (3) Verify that the Computer Branch ships to the TCC Tape Library (using normal production procedures) the tape copy of file CRX[/]312 produced by Run CRX[/]3Q on the last day of each calendar quarter. This tape must be shipped within two weeks. Have the Computer Branch insure that the external reel number corresponds with the one on the internal tape label.

2.11.1.2.9  
(01-01-2008)  
**Consistency in  
formatting IDRS Letters**

- (1) Reference items should be aligned, for example:

Form Number:	01	7v
Amount:	02	12\$

- (2) Enclosures:
  - a. Two copies of any form should always be enclosed when indicated on the letter. Therefore, it is not necessary to include the number (2) on the letter, for example:

Form 1040	not Form 1040(2)
Forms 941	

- b. However, if 3 copies of the form will be required, the number (3) should be included after the form to alert the area to enclose an additional form, for example:

Form 942(3)

- (3) Revision Dates — The revision date is the transmittal number of the newest transmittal of CRX–5411. It should appear on the IDRS Correspondex copy. The “Transmittal Number,” shown at the top of the SERP copy will appear in the LETTER-HEADER-LINE of the FORM-LETTER, for example:

<u>Correspondex Copy</u>	<u>LETTER-HEADER-LINE</u>
Letter 193C(2–89)	021989
Letter 193C(Rev. 11–90)	111990

- (4) FILL-INS on the FORM-LETTER should be indicated by the use of brackets rather than parenthesis so that the operators do not confuse them with the text of the letter. The number of FILL-IN characters in the letter file is not necessarily the same as the number of characters that can be entered during real time. The size of a NARRATIVE-FILL-IN as shown in the SERP copy should reflect the number of characters that can be entered during real time. See Exhibit 2.11.1-1.



- 2.11.1.3  
(01-01-2008)  
**Correspondex  
FORM-LETTERS and  
NON-LETTER-RECORDs  
Definitions and Validity  
Requirements**
- (1) This section provides definitions and validity requirements for elements necessary to update Correspondex FORM-LETTERS and NON-LETTER-RECORDs. These elements are input to the Correspondex System using the Inter-active Programming (IAP) terminal CTS (or text editor) commands. Use of Text Editor is explained in ( See IRM 2.11.1.4.2). Specific TCC instructions are provided in See IRM 2.11.1.5.5.. Specific Service Center instructions are provided in See IRM 2.11.1.6.
- 2.11.1.3.1  
(01-01-2000)  
**Action Codes**
- (1) ACTION-CD — an alpha code indicating the kind of action to be taken during an update of a FORM-LETTER or NON-LETTER-RECORD. The following ACTION-CDs are valid:
- a. “A” — add a FORM-LETTER to the NMLF, or add NON-LETTER-RECORDs to the CNLF.
  - b. “D” — delete a FORM-LETTER from the NMLF, or delete NON-LETTER-RECORDs from the CNLF.
  - c. “R” — revise a FORM-LETTER on the NMLF, or revise NON-LETTER-RECORDs on the CNLF.
- 2.11.1.3.2  
(01-01-2008)  
**Fill-ins**
- (1) FILL-IN — a blank space provided in the letter format to be filled with data input on IDRS by the terminal operator. Regular FILL-INS range in length from 1 to 37 characters. NARRATIVE-FILL-INS range in length from 38 to 420 characters See Exhibit 2.11.1-1.
- 2.11.1.3.3  
(01-01-2008)  
**Letter Format**
- (1) FORM-LETTER — the complete letter format, with open fields for fill-in data. There are three types of LETTER-LINES:
- a. LETTER-HEADER-LINE — the first line of a FORM-LETTER. It contains detailed format information about the FORM-LETTER.
  - b. NARRATIVE-LINE — provides identification and text of a LETTER-LINE on a FORM-LETTER. The FILL-IN-LINE-IND for a NARRATIVE-LINE is always blank. (See Exhibit 2.11.1-8).
  - c. FILL-IN-LINE — provides FILL-IN validity information for the preceding NARRATIVE-LINE of a FORM-LETTER. The FILL-IN-LINE-IND for a FILL-IN-LINE is always “F”. See Exhibit 2.11.1-6.
- 2.11.1.3.4  
(01-01-2008)  
**Letter Paging Fields**
- (1) Closure Area — adjacent lines on a letter that will be printed on the same page (i.e., not split between pages). This area is only meaningful on a letter with selective paragraphs. The closure area should include the last paragraph in the body of the letter, the closing, signature title, and, when present, the enclosures notation. This area is defined by the CLSNG-PARA-LINE-NUM, which is the line number of the first line of this area, and the NUM-OF-CLSNG-LINES, which is the number of lines in the closure area. Upon reaching the CLSNG-PARA-LINE-NUM, Program CRX[/]3 will use the NUM-OF-CLSNG-LINES to determine if enough lines remain on the current page to print the entire closure area. If there is not enough room, the entire closure area will print on the next page. ( See IRM 2.11.1.3.7.1. for detailed explanations of these fields.)
- (2) EJECT-LINE-NUM — use of this field will cause Program CRX[/]3 to eject to the next page regardless of how much room is left on the current

page. This field should contain the LETTER-LINE-NUM of the last line to print BEFORE the page eject occurs. This line must occur after the closure area, if one is specified.

2.11.1.3.5  
(01-01-2000)  
**OMB Clearance**

- (1) If a letter is an Information Collection Request (ICR) the clearance number and expiration date will be coded onto the LETTER-HEADER-LINE to automatically print on the TAXPAYER-LETTER. The OMB clearance information will be included as part of the IDRS Correspondence exhibit for the letter.
- (2) A document perfection (follow-up) letter, one which solely requests information omitted from, or incorrectly reported on a previously filed ICR, will require the input of an OMB-CODE at the time of input with CC LPAGE. If an OMB Code is required, "Entry Required" will appear in the IDRS Correspondence Index. If the Exhibit does not indicate required, use of a Code should be based on the usage of the letter.

2.11.1.3.6  
(01-01-2000)  
**Selective Paragraphs**

- (1) SELECTIVE-PARAGRAPH — a paragraph or line in a letter format that may or may not be included in the TAXPAYER-LETTER, depending on the choice of the terminal operator. The one character alphanumeric code identifies the particular SELECTIVE-PARAGRAPH to be printed on the TAXPAYER-LETTER. A SELECTIVE-PARAGRAPH may contain regular FILL-INS, be a NARRATIVE-FILL-IN, or be composed entirely of pre-determined text. When coding a letter with SELECTIVE-PARAGRAPHS, note that during real-time input, if any SELECTIVE-PARAGRAPH is present, at least one must be chosen. Therefore, if the letter can make sense without a SELECTIVE-PARAGRAPH, code a blank line at the end of the letter as a SELECTIVE-PARAGRAPH and note its purpose in the IDRS Correspondence.

2.11.1.3.7  
(01-01-2008)  
**Input format for a  
LETTER-HEADER-LINE**

- (1) The LETTER-HEADER-LINE is the first line of every FORM-LETTER. It contains information concerning the formatting of the FORM-LETTER into a TAXPAYER-LETTER. All blank spaces between input elements are significant. ( See IRM 2.11.1.3.7. for the input format.) Each element of the LETTER-HEADER-LINE is explained below:

2.11.1.3.7.1  
(01-01-2008)  
**Parts of LETTER-  
HEADER-LINE**

- (1) CRRSPNDX-RECORD-ID — a literal which identifies the FORM-LETTER record throughout the system. The OUTPUT-CD is "L3" and is followed by two blanks.
- (2) NUM-OF-COPIES — a numeric code (1–3) to indicate the number of copies of a TAXPAYER-LETTER to be printed.
- (3) RESERVED-INDICATOR — this field should be left blank.
- (4) FORM-LETTER-NUM — an identification assigned to each FORM-LETTER that contains a FORM-NUMERIC-ID (4 numeric characters) and a two character alpha code.
  - a. FORM-NUMERIC-ID — 0001–9000 for national "C" letters. 9001–9999 for local letters.
  - b. ALPHA-CODES — indicate the origin of the letter ( See Exhibit 2.11.1-3.)
- (5) PREADDRESSEE-IND — a code which indicates if a preaddressee should be extracted from the CNLF for this FORM-LETTER.

- a. "P" — the letter is preaddressed and an address must be extracted from the CNLF. The SALUTATION-LINE-NUM must be [slash0][slash0][slash0].
  - b. "[slashb]" — the letter is not preaddressed and no address will be extracted from the CNLF. The SALUTATION-LINE-NUM must be [slash0][slash0]1–[slash0]15.
- (6) SELECTIVE-PARA-IND — an indicator used to show if a FORM-LETTER contains any SELECTIVE-PARAGRAPHS.
- a. "S" — the letter contains one or more lines coded as SELECTIVE-PARAGRAPHS.
  - b. "[slashb]" — the letter has no SELECTIVE-PARAGRAPHS.
- (7) LETTER-REVISION-DT — a number reflecting the letter transmittal of the Correspondence Form in Document 6548.
- (8) TOTAL-LETTER-LINES — this field is generated by Program CRX51 at TCC, or by Program CRX5B at the service centers and should be entered as blanks at the terminal.
- (9) SALUTATION-LINE-NUM — a numeric Code ([slash0][slash0][slash0]–[slash0]15) indicating the NARRATIVE-LINE on which the salutation will print on TAXPAYER-LETTERS
- a. The code must be [slash0] [slash0][slash0] if the PREADDRESSEE-IND is "P".
  - b. The code must be [slash0] [slash0]1–[slash0]15 if the PREADDRESSEE-IND is blank.
  - c. The line designated as the SALUTATION-LINE must be blank. The lines before and after the SALUTATION-LINE must also be blank.
- (10) SIGNATURE-TITLE-LINE-NUM — a numeric value ([slash0]16–950) which represents the NARRATIVE-LINE on which the first SIGNATURE-TITLE-FIELD from the CNLF will be formatted. Program CRX5B or CRX51 generates this numeric value if insertions or deletions are made to a FORM-LETTER. The NARRATIVE-LINE, and the line that follows it, must be blank on the FORM-LETTER.
- (11) CLSNG-PARA-LINE-NUM — must be numeric [slash0][slash0] [slash0] or [slash0]16–950. Reflects the LETTER-LINE-NUM of the first narrative line in a closure area. The SELECTIVE-PARA-CD on the NARRATIVE-LINE coded as CLSNG-PARA-LINE-NUM must be blank. [slash0][slash0][slash0] indicates no closure area.
- (12) NUM-OF-CLSNG-LINES — Must be [slash0][slash0][slash0] –35.
- a. Must be [slash0][slash0] if CLSNG-PARA-LINE-NUM is [slash0][slash0][slash0]. (No Closure Area)
  - b. [slash0]1–35 — the number of NARRATIVE-LINES in the Closure Area.
  - c. The Closure Area must end before the EJECT-LINE-NUM.
  - d. When a FORM-LETTER includes a Closure Area, care must be taken when assigning the NUM-OF-CLSNG-LINES. Remember, pages two and three of a TAXPAYER-LETTER may contain a maximum of 47 lines each. This could affect how the final letter looks, particularly if a number greater than 24 (half of a page) is used. Also, if the NUM-OF-CLSNG-LINES does not include all SELECTIVE-PARAGRAPHS within the Closure Area,

the SELECTIVE-PARAGRAPHS chosen during real time may cause the Closure Area to be split between two pages of the printed TAXPAYER-LETTER.

- (13) EJECT-LINE-NUM — Must be [slash0] [slash0][slash0] or [slash0] 16–950. Must not be less than the sum of the CLSNG-PARA-LINE-NUM and the NUM-OF-CLSNG-LINES.
  - a. 016–950 reflects the LETTER-LINE-NUM of the last NARRATIVE-LINE that will print on the current page of the letter. The remainder of the TAXPAYER-LETTER will be formatted on the subsequent page(s).
  - b. [slash0][slash0] [slash0] indicates no special page eject processing.
  - c. If the EJECT-LINE-NUM is greater than 45, the CLSNG-PARA-LINE-NUM and NUM-OF-CLSNG-LINES must be non-zero.
- (14) OMB-IND - indicates if OMB clearance information (elements 15 & 16, below) must be printed on the TAXPAYER-LETTER. (Valid codes are blank, “[slash0]” or “1”)
  - a. “[slashb]” — this letter does not require OMB clearance information, but the examiner may enter a code if appropriate.
  - b. “[slash0]” — OMB clearance information will be provided on the LETTER-HEADER-LINE and will print on the TAXPAYER-LETTER.
  - c. “1” — the terminal operator must input a code from the OMB clearance index to extract OMB clearance information from the CNLF.
- (15) OMB-CLEARANCE-NUMBER — a number assigned by the Office of Management and Budget (OMB) to most Federal Tax forms and letters requesting information from taxpayers. Only those letters requesting information will require an OMB clearance number and expiration date.
  - a. If the OMB-IND is blank or “1” this field should be left blank.
  - b. If the OMB-IND is “[slash0]” this field is required input and must be numeric.
- (16) OMB-EXPIRATION-DT — the date, in MMDDCCYY format, that an OMB-CLEARANCE-NUMBER for a letter or Federal Tax form will expire. This is an optional field and is only present if an OMB-CLEARANCE-NUMBER is present.

## 2.11.1.3.8

(01-01-2008)

**Input Format for a  
NARRATIVE-LINE**

- (1) It is only necessary to input a NARRATIVE-LINE if it is to be added to the FORM-LETTER or the contents of the NARRATIVE-LINE have changed. All blank spaces between input elements must be entered at the terminal. ( See Exhibit 2.11.1-8for the input format).
- (2) LETTER-LINE-NUM — valid line numbers are [slash0][slash0]1–950 and are used to indicate the sequential placement of the NARRATIVE-LINE in a FORM-LETTER.
- (3) FILL-IN-IND — this field must be blank.
- (4) CES-SPECIAL-CHAR — This character is used only by TCC Letter Technicians when updating the MMLF. Allowable characters are space, @ or /.
- (5) SELECTIVE-PARA-CD — an alphanumeric code (A–Z or [slash0]–9 or a–z or ! # \$ % & / : ; < > V//) used with the NARRATIVE-LINE to identify the data on the

line as belonging to a particular selective line or paragraph. If the NARRATIVE-LINE is not part of a SELECTIVE-PARAGRAPH this field must be blank. For inserting or deleting SELECTIVE-PARAGRAPH, See IRM 2.11.1.4.1.

2.11.1.3.9  
(01-01-2008)  
**Input Format for a  
FILL-IN-LINE**

- (1) It is only necessary to input a FILL-IN-LINE if a FILL-IN is to be added to the FORM-LETTER or the contents of the FILL-IN-CD-SECTION have changed. All blank spaces between input elements must be entered at the terminal. ( See Exhibit 2.11.1-6. for the input format.) A FILL-IN-LINE containing a RETURN-ADDRESS-FILL-IN must have no other FILL-INS on the line. The second line of a RETURN-ADDRESS-FILL-IN is not automatically generated and must be input. If the FILL-IN is a NARRATIVE-FILL-IN, it must be the last FILL-IN on the line. A FILL-IN-LINE is not automatically deleted if the NARRATIVE-LINE which contains the FILL-IN is deleted. The FILL-IN-LINE must be deleted using the line delete command.

2.11.1.3.9.1  
(01-01-2000)  
**LETTER-LINE-NUM**

- (1) Valid line numbers are [slash0][slash0]1–950. The LETTER-LINE-NUM must be the same as the NARRATIVE-LINE containing the FILL-IN.

2.11.1.3.9.2  
(01-01-2000)  
**FILL-IN-LINE-IND**

- (1) This field must be “F”.

2.11.1.3.9.3  
(01-01-2000)  
**NUM-OF-FILL-IN-CD-  
SECTIONS**

- (1) This field is generated by Program CRX51 at TCC, or by Program CRX5B at the service centers and should be entered as blanks at the terminal.

2.11.1.3.9.4  
(01-01-2008)  
**SELECTIVE-PARA-CD**

- (1) An alphanumeric code (A–Z or [slash0]–9 or a–z or ! # \$ % & / : ; < > \ / ) used with the FILL-IN-LINE to identify the data on the line as belonging to a particular selective line or paragraph. The SELECTIVE-PARA-CD on a FILL-IN-LINE must be the same as the NARRATIVE-LINE containing the FILL-IN. If the FILL-IN is part of a NARRATIVE-LINE that has a blank SELECTIVE-PARA-CD, the SELECTIVE-PARA-CD of the FILL-IN-LINE must also be blank. For inserting or deleting SELECTIVE-PARAGRAPH, See IRM 2.11.1.4.1.

2.11.1.3.9.5  
(07-01-2011)  
**FILL-IN-CD-SECTION**

- (1) A portion of the FILL-IN-LINE that provides information necessary to validate FILL-IN data from CC LPAGE and format it properly in the TAXPAYER-LETTER. Each FILL-IN-LINE may contain one to five FILL-IN-CHNG-SECTIONS. The letter technician at TCC or the service center codes these fields.

2.11.1.3.9.5.1  
(07-01-2011)  
**PARTS OF THE  
FILL-IN-CD-SECTION**

- (1) FILL-IN-NUM — a alphanumeric code ([slash0]1–99, A1–A9, B1–B9,...Z1–Z9, a1–a9, b1–b9,...z1–z9) indicating the sequential placement of the FILL-IN on the letter. If more than 99 FILL-IN-NUM's are needed use A1, A2 through A9, then B1 through B9, C1 through C9, etc.. Z1 through Z9. If more fill-ins are needed, use a1 through a9, .... z1 through z9. This will give a total of 567 possible fill-ins.

**Note: Programs CRX5B (CRX51 for TCC) will re-sequence fill-in numbers in the proper order for you. You don't have to make sure that fill-in numbers are in the proper sequence. As long as any number is entered**

**in the fill-in area and the rest of the FILL-IN-CD-SECTION is valid, 5B/51 will re-sequence the fill-ins in the proper order.**

- (2) FILL-IN-REQUIRED-IND — a value indicating whether the FILL-IN is required or not.
- “E” — the FILL-IN is elective; input is optional.
  - “M” — the FILL-IN is mandatory; input is required.
- (3) FILL-IN-START-POSITION — the position on the NARRATIVE-LINE where FILL-IN data will be inserted. It is no longer necessary to count spaces on the NARRATIVE-LINE to determine the FILL-IN-START-POSITION. Programs CRX51 or CRX5B will do it for you automatically. ( See Exhibit 2.11.1-2.) Valid ranges for FILL-IN-START-POSITIONS are:

<b>If</b>	<b>FILL-IN-START-POSITION must be:</b>
All FILL-IN-VALIDATION-CDs	11 – 8[slash0].
PRINT JUSTIFICATION CD = “A”	11 – 34.

- (4) PRINT-JUSTIFICATION-CD — indicates positioning of FILL-IN-DATA and the data following a particular FILL-IN when it is printed on the TAXPAYER-LETTER. Valid codes are:
- “A” — a RETURN-ADDRESS-FILL-IN. There must be no other data on the NARRATIVE-LINE. Address will print on two consecutive lines.
  - “J” — left justified. Data will shift to the left following the FILL-IN. Data following the FILL-IN will overlay any unused FILL-IN positions.
  - “L” — left justified with no shifting of data. Any unused FILL-IN positions will be blank on the TAXPAYER-LETTER.
  - “N” — NARRATIVE-FILL-IN. Must be 38 to 420 characters in length. Must be the last FILL-IN on the NARRATIVE-LINE.
  - “R” — right justified with no shifting of data. (Used to line up columns of money amounts.)
- (5) MAX-FILL-IN-LENGTH — the maximum number of characters allowed for a particular Fill-in
- If the FILL-IN-VALIDATION-CD is “P” or “D” then the length must be 13.
  - If the FILL-IN-VALIDATION-CD is “T” then the length must be 10 or 12.
  - If the FILL-IN-VALIDATION-CD is “Y” then the length must be 4.
  - If the PRINT-JUSTIFICATION-CD is “J”, “L”, or “R” and the FILL-IN-VALIDATION-CD is not “P”, “T”, “D”, or “Y” then the Fill-in must be 1–37 spaces
  - If the PRINT-JUSTIFICATION-CD is “A” the Fill-in length must be 35.
  - If the PRINT-JUSTIFICATION-CD is “N” the MAX-FILL-IN-LENGTH must be 38–420. When a letter request is input through the IDRS terminal, it is difficult to determine how the NARRATIVE-FILL-IN will print on the TAXPAYER-LETTER. Words are not split between lines when the letters print; therefore unused positions at the end of the line reduce the actual number of characters available. (For example: If there are five positions left at the end of a line and the next word to be



printed is six characters long, all six characters will be moved to the next line leaving the five positions unused.) If all characters coded into the MAX-FILL-IN-LENGTH are used and there are any unused characters on any of the lines, Program CRX03 will reject the letter. To prevent this problem, Program CRX58, which builds the CLVF, reduces the MAX-FILL-IN-LENGTH. This reduced number is the number of characters allowed for IDRS input. The SERP copy should reflect this reduced number. (For example: When adding or revising a letter on the IAP terminal the MAX-FILL-IN-LENGTH of a NARRATIVE-FILL-IN is 250. The CLVF and the IDRS Correspondex should reflect 229 as the maximum number of characters allowed as input on the IDRS terminal.) ( See Exhibit 2.11.1-1.)

- (6) FILL-IN-VALIDATION-CD — a one character code which indicates the types of characters valid for real-time input of a particular FILL-IN.
- “1” — RETURN-ADDRESS-FILL-IN (requires a justification code of (“A”). Real-time input must be a valid RETURN-ADDRESS-CD.
  - “\$” — Money Amount Fill-in. Requires money amount format with commas and period.
  - “A” — alpha and blank only.
  - “B” -- BOD specific telephone number. Length must be 4.
  - “C” -- Batch Number.
  - “D” — provides automatic printing of month, day, and year for date Fill-ins from MMDDYYYY input. Length must be 13.
  - “L” -- DLN Number.
  - “N” — numeric only.
  - “P” — provides automatic printing of month, day, and year for tax period Fill-ins from YYYYMM input or MMDDYYYY input. Length must be 13.
  - “S” — used for name and signature title Fill-ins only.
  - “T” — provides automatic printing of the TIN from screen line one of CC LPAGE when a valid TIN or an asterisk (“\*”) followed by blanks is present. Length must be 1[slash0] or 12.
  - “V” — any valid character.
  - “Y” — year only. Length must be 4. Valid range of 1960–1999 or 2000–2029.
  - “a” -- Attachment fill-in.
  - “f” -- Form fill-in.
  - “n” -- Notice fill-in.
  - “p” -- Publication fill-in.
  - “s” -- Schedule fill-in.
  - “i” -- instruction fill-in.
  - “c” -- catalog number fill-in. Length must be 6. Five numerics followed by an alpha.
  - “d” -- Revision date fill-in. Length is 8 in the format: MMDDYYYY.
  - “x” -- Sheet count fill-in. Length is 4.
- (7) MESSAGE-CODES — Used only by the TCC Letter Technicians to update the MMLF. This field will be used by the Correspondex Expert System to put out messages on the screen. MSG-CODES consist of a small letter ‘a’, ‘c’, ‘g’ or ‘m’ followed by a numeric value of 00–99. If there is no message; three spaces should may be substituted.

2.11.1.4  
(01-01-2000)  
**CTS Background**

- (1) Previous editions of this handbook have advised you to use Text Editor, an old Unisys software package, to input, change, and display letter content. Unisys does not intend to continue supporting Text Editor, meaning some day it will no longer work correctly. Therefore, we are including new instructions on how to use CTS, (Conversational Time Sharing). CTS is a user-friendly package, which is easy to learn, and a powerful tool for editing text. You'll find most CSAs know and use CTS, and we urge you to get to know it soon. The instructions for the use of Text Editor will continue to appear in this handbook, but will not be updated.

2.11.1.4.1  
(01-01-2000)  
**General, CTS**

- (1) Use CTS commands to input, change, and display letter content. This is done on a line-by-basis. CTS Commands are entered in the first space after the SOE (Start-of-Entry) character. Data that you are entering, such as NARRATIVE-LINES, or OMB-CLEARANCE-UPDATE-RECORDs must follow line numbers. These are not the same as the LETTER-LINE-NUMs used to identify LETTER-LINES on the FORM-LETTER-EXHIBIT. A good practice is to start with the LETTER-HEADER-LINE having a CTS editing line number of 100. Then number by tens. Then the NARRATIVE-LINE with a LETTER-LINE-NUM of 001 would have the CTS line number of 110, LETTER-LINE-NUM 002 would be CTS line number 120, etc. This allows you to easily insert up to nine lines between 001 (CTS 110) and 002 (CTS 120) by giving them CTS line numbers between 110 and 120. In addition, each FILL-IN-LINE is assigned its own CTS editing line number, although the value of the LETTER-LINE-NUM on the FILL-IN-LINE is the same as the LETTER-LINE-NUM of the preceding NARRATIVE LINE. Therefore, caution must be used when referring to CTS line numbers, since they will never match the LETTER-LINE-NUMs contained as data on the line.
- (2) CTS line numbers take up space, and you will find that your full letter line may not fit on the screen. However, CTS allows 132 characters in a line. You can keep typing and hit XMIT at the end. It won't look right on the screen, but it works.
- (3) All CTS commands except **GO** can be abbreviated to the first three letters of the command. Some can be abbreviated to one letter.
- (4) CTS will accept any combination of characters and lines in the text, whether or not it constitutes valid letter data. Therefore caution must be taken to enter data in the correct position on the line. To display the CTS line with a scale showing what column you are in, use the command **Print** with the **Scale** feature, e.g. **P 110 S** prints line 110 on your screen with a scale. This is a handy way to check spacing.
- (5) To insert one or more consecutive lines of text, locate the lines where the new text will be inserted. Then simply give it line numbers that fall between the existing lines. For instance, to enter one line between CTS line numbers 170 and 180, number the new line 175, enter the text, and press XMIT. To enter three lines, give them CTS line numbers 172, 175, and 178.
- (6) Unlike Text Editor, lines with higher edit line numbers are not immediately re-numbered. Therefore, you should always be aware of where you are in the text. Display a full screen of lines so that you do not inadvertently use an edit line number already in use. In the example above, if you used 180 again, you would overwrite the current line 180. If you entered CTS lines 172, 175, 178,



and 185 consecutively on the screen, they would not appear that way in your letter. CTS line 185 would come after CTS line 180.

- (7) Inserting SELECTIVE-PARAGRAPHS. In order to insert a SELECTIVE-PARAGRAPH(s) into a FORM-LETTER, an INSERTED-SELECTIVE-PARA-CD (“+” or “-” sign) must be placed in the field SELECTIVE-PARA-CD (column 8). If more than one SELECTIVE-PARAGRAPH needs to be inserted, alternately use the plus and minus signs to differentiate between the various SELECTIVE-PARAGRAPHS. Program CRX5B or CRX51 will re sequence SELECTIVE-PARA-CDs in ascending sequence. The number of inserted SELECTIVE-PARA-CDs is not restricted ; however, the total of all SELECTIVE-PARA-CDs may not exceed 62 on the FORM-LETTER.
- (8) Do not renumber any LETTER-LINE-NUMBERS or FILL-IN-NUMBERS. This will prevent the validation program (CRX51 at TCC or CRX5B at the Service Centers) from correctly setting the CHANGE-INDICATORS by comparing the revised letter with the prior version. Program CRX51 or CRX5B will renumber LETTER-LINES and fill-ins. It is not necessary to input LETTER-LINE-NUMBs in a newly inserted NARRATIVE-LINE or FILL-IN-LINE. Instead, leave three blanks after the CTS line number or, if you are in automatic numbering mode, leave three blanks after the SOE symbol and start input with the FILL-IN-LINE-IND.
- (9) CTS deletes lines in many ways. It is good to learn one way you like and stick with it. A very safe way is to specify the CTS line number or numbers you wish to delete.
  - a. To delete CTS line 250: **DEL 250,250.**
  - b. To delete all lines from 250 through 340: **DEL 250,340.**
  - c. If too many lines are deleted inadvertently, the letter can be retrieved again from the files using CRX5[/] at TCC, or CRX5A at the Service Centers (unless it is a new letter).
- (10) Inserting Blank Lines. In order to insert blank lines in the body of a letter, type in a CTS line number which falls numerically where you want the blank line, and then transmit.
- (11) Setting TAB Characters. A good TAB character is the semicolon, (;), because it is rarely used. If you should be using the semicolon as a TAB character and then type it in the NARRATIVE-TEXT of a letter, the contents of the line will be spaced incorrectly. The TAB character may be set or changed using the TAB command: —Type TAB[/]x[/]n,n,n . . . where “x” is the character to be used as the TAB character, and “n” is the column number where the tab stop is desired. For example—

**TAB ; 5,8**

This command sets tab stops in columns 5 and 8.

- (12) The commands input to the IAP terminal to update letters are described below. Before using the terminal the user must have obtained the following information from the security or operations staff. These same values will always be used unless the user is notified of a change.
  - a. Terminal-ID — (usually taped to the terminal)

- b. User-ID and password — (for each individual user)
- c. Run-ID — (to identify printed listings)
- d. Account Number — (for system accounting purposes)
- e. Project-ID — (used with filenames to identify files)

2.11.1.4.2  
(01-01-2000)

**General, Text Editor**

- (1) Use Text Editor commands to input, change, and display letter content. This is done on a line-by-line basis. The text editor assigns each line a number starting with 1. This number is not the same as the LETTER-LINE-NUMs used to identify LETTER-LINES on the FORM-LETTER-EXHIBIT. This is because the LETTER-HEADER-LINE is edit line number 1. Therefore, the NARRATIVE-LINE with a LETTER-LINE-NUM of [slash0][slash0]1 has an edit line number of 2. In addition, each FILL-IN-LINE is assigned its own edit line number, although the value of the LETTER-LINE-NUM on the FILL-IN-LINE is the same as the LETTER-LINE-NUM of the preceding NARRATIVE-LINE. Therefore, caution must be used when referring to edit line numbers, since they will never match the LETTER-LINE-NUMs contained as data on the line.
- (2) The text editor will accept any combination of characters and lines in the text, whether or not it constitutes valid letter data. Therefore caution must be taken to enter data in the correct position on the line. Be sure to display the line using the "P" command rather than the "LNP" command in the text editor to check spacing.
- (3) To insert two or more consecutive lines, locate the line that will precede the new text. Input the edit line number of that line and press XMIT to make it the current line. Press XMIT again; the terminal will display INPUT MODE. Now text can be entered line by line with no further edit commands needed. After the last new line has been input, press XMIT again. This will return the terminal to EDIT MODE. Now the text editor will respond to edit commands.
- (4) As lines are inserted or deleted, all lines with higher edit line numbers are immediately renumbered. Therefore, use the LNP command to display the edit line numbers of the lines you are editing. If you make insertions and deletions in reverse line order, starting from the end of the letter, renumbering will not be a problem.
- (5) Inserting SELECTIVE-PARAGRAPHS. General, CTS, 1.4.1.
- (6) Do not renumber any LETTER-LINE-NUMBERS or FILL-IN-NUMBERS. This will prevent the validation program (CRX51 at TCC or CRX5B at the Service Centers) from correctly setting the CHANGE-INDICATORS by comparing the revised letter with the prior version. Program CRX51 or CRX5B will renumber LETTER-LINES and fill-ins. It is not necessary to input LETTER-LINE-NUMs in a newly inserted NARRATIVE-LINE or FILL-IN-LINE. Instead, leave three blanks after the SOE symbol and start input with the FILL-IN-LINE-IND.
- (7) The "D" or line delete command.
  - a. Use "D" alone to delete the current line.
  - b. Use "D" followed by two edit line numbers (not LETTER-LINE-NUMs) to delete a series of lines. (i.e. D 25,50)
  - c. If "D" is followed by only one number, that number of lines will be deleted, not just that line number. If too many lines are deleted inadvertently, the letter can be retrieved again from the files using CRX5[slash0] at TCC, or CRX5A at the Service Centers (unless it is a new letter).

- (8) Inserting Blank Lines. In order to insert blank lines in the body of a letter, type I+ and then transmit.
- (9) Setting TAB Characters. The default TAB character is the semicolon (;). While in input mode, if the semicolon is used in the NARRATIVE-TEXT of a letter the contents of the line will be spaced incorrectly. The TAB character may be changed using the TAB command:
  - a. Type TAB[/]x where "x" is the character to be used as the TAB character. The TAB character assigned should be a character which will not be used in the NARRATIVE-TEXT of the letter. (For example the caret (^).)
  - b. Then press the XMIT key to enter the new TAB character.
  - c. If specific tab stops are desired, type TAB[/]x[/]n, n, n . . where "n" is the column number for a tab stop.
- (10) The commands input to the IAP terminal to update letters are described below. Before using the terminal the user must have obtained the following information from the security or operations staff. These same values will always be used unless the user is notified of a change.
  - a. Terminal-ID — (usually taped to the terminal)
  - b. User-ID and password — (for each individual user)
  - c. Run-ID — (to identify printed listings)
  - d. Account Number — (for system accounting purposes)
  - e. Project-ID — (used with filenames to identify files)

2.11.1.4.3  
(01-01-2000)

**Logging On the Terminal**

- (1) Log on to the terminal, as follows:
  - a. Press the keyboard unlock key.
  - b. Press the SOE (start-of-entry) key and type the Terminal-ID.
  - c. Press the XMIT (transmit) key.
  - d. The terminal will respond ENTER USERID/PASSWORD. Type your user-id/password and press XMIT. The characters typed will not appear on the screen. If the user-id and password are not accepted, re-start the logon procedure and input the user-id and password correctly. If the user-id and password are accepted, the terminal will display the name of the computer system and may display one or more informational messages.
  - e. Each command or input line must be preceded by an SOE symbol and must be input using the XMIT key. The cursor must be positioned to the right of the text being input or the full line will not be transmitted.

2.11.1.4.4  
(01-01-2000)

**Assigning Correspondex Files**

- (1) Use the following procedure to assign the Correspondex files.
  - a. Type in the command @ADD CRX-ASSIGNS. and press XMIT.
  - b. The terminal should respond with a series of READY messages, or facility error messages. If error messages are displayed, or the system is unable to assign the ADD file, contact the operations staff to resolve this problem.

2.11.1.4.5  
(01-01-2008)  
**CTS Commands**

- (1) In order to input, review, or revise a letter, CTS must be called. Once in CTS mode, you may use CTS commands to make changes to a letter. A summary of CTS commands appears in See Exhibit 2.11.1-18. . Each command must be preceded by an SOE symbol, and the XMIT key must be pressed when the cursor is to the right of the complete command. Each line of text must be preceded by an SOE symbol and a CTS line number, and the XMIT key must be pressed when the cursor is to the right of the complete line of text. The commands are explained more fully in the Time Sharing Guide (UP-8118.2) or Conversational Time Sharing (CTS) System (UP-7940) published by Unisys. The input formats for the FILL-IN-LINE, LETTER-HEADER-LINE, and NARRATIVE-LINE appear in See Exhibit 2.11.1-6. See Exhibit 2.11.1-7. See Exhibit 2.11.1-8. The start positions for the elements to be input are the actual column numbers in which they must appear in the form letter and should not be confused with the column number appearing on line 25 of the terminal screen. This will vary because of the SOE symbol and the CTS line numbers which take up space on the left of the screen, but will not be present in the letter. Validity requirements for elements to be input are explained in See IRM 2.11.1.3.
- (2) To call CTS, use the Executive Control Language (ECL) command **@CTS**.
- (3) To revise a letter it is only necessary to update those lines which require changes. for instructions to insert blank lines or set the TAB character See IRM 2.11.1.4.1.. To revise a letter that has been retrieved by Program CRX50 at TCC or by Program CRX5A at the Service Centers, enter CTS as instructed above, then
  - a. Type **OLD CTWF**. then press XMIT.
  - b. File CTWF is placed in "little f"; that is, it becomes your work file in CTS. The letter may now be revised using CTS commands. ( See Exhibit 2.11.1-18.)
  - c. To save your work, type **REP CTWF**. then press XMIT.
- (4) If a new letter is to be input, the LETTER-HEADER-LINE, and all NARRATIVE-LINES and FILL-IN-LINES must be input. The LETTER-LINE-NUM is optional input for all NARRATIVE-LINES and FILL-IN-LINES. If input all LETTER-LINE-NUMs must be in ascending sequence. The FILL-IN-NUM must be input for all FILL-INS and must be in ascending sequence. All lines which are part of a SELECTIVE-PARAGRAPH must include a SELECTIVE-PARA-CD and all SELECTIVE-PARA-CDs must be in ascending sequence. See Section 1.4.1. for instructions to insert blank lines or change the TAB character.
- (5) The commands to use CTS to input a new letter or to review a letter that has been either retrieved or input are the same as shown above to revise a letter.

**@ CTS**

**OLD CTWF.**

## 2.11.1.4.6

(01-01-2008)

**Text Editor Commands**

- (1) In order to input, review, or revise a letter the text editor must be called to place you in an edit mode. Once in edit mode, text editor commands may be used to make changes to a letter. A summary of edit commands appears in See Exhibit 2.11.1-9. They may be input in any order. Each command or text line must be preceded by an SOE symbol and the XMIT key must be pressed when the cursor is at the end of the line. The commands are explained more completely in the TEXT EDITOR MANUAL published by UNISYS. The input formats for the FILL-IN-LINE, LETTER-HEADER-LINE, and NARRATIVE LINE appear in Exhibits 2.11.1-6 through 2.11.1-8 ( See Exhibit 2.11.1-6. The Start Positions for the elements to be input are relative to the SOE if in input mode or to the last character of the text editor command if in update mode. Validity requirements for elements to be input are explained in ( See IRM 2.11.1.3.)
- (2) To call the Text editor to place you in an edit mode use the Executive Control Language (ECL) command @ED followed by a comma then the appropriate edit options. The options are:
  - a. "I" — Input mode.
  - b. "Q" — ASCII character representation. This should be used with the "I" or "U" options.
  - c. "R" — Review mode.
  - d. "U" — Update mode.
- (3) If a letter is to be revised, it is only necessary to update those lines which require changes. See IRM 2.11.1.4. for instructions to insert blank lines or change. See the TAB character. To call text editor to revise a letter that has been retrieved by Program CRX5[slash0] at TCC or by Program CRX5A at a Service Center, use the ECL command @ED with the "U" and "Q" options. The format is as follows:
  - a. Type @ED, QU CTWF. then press XMIT.
  - b. The "U" option will place you in update mode. Once in update mode, the letter may be revised using the text editor commands. ( See Exhibit 2.11.1-19.)
- (4) If a new letter is to be input, the LETTER-HEADER-LINE, and all NARRATIVE-LINES and FILL-IN-LINES must be input. The LETTER-LINE-NUM is optional input for all NARRATIVE-LINES and FILL-IN-LINES. If input all LETTER-LINE-NUMs must be in ascending sequence. The FILL-IN-NUM must be input for all FILL-INS and must be in ascending sequence. All lines which are part of a SELECTIVE-PARAGRAPH must include a SELECTIVE-PARA-CD and all SELECTIVE-PARA-CDs must be in ascending sequence. See IRM 2.11.1.4.2. for instructions to insert blank lines or change the TAB character.

**Note:** This will wipe out any data that is on the CTWF at the time you input the command.

- (5) To call the text editor to begin input of an entirely new letter, use the ECL command @ED with the "I" and "Q" options. The format is as follows:
  - a. Type @ED,IQ CTWF. then press XMIT.
  - b. Editor is ready to accept input.
- (6) To call the text editor to review a letter that has been either retrieved or input, use the ECL command @ED with the "R" option. The format is as follows: — @ED,R CTWF. The "R" option will place you in review mode. No changes can

be made in this mode. If you wish to make changes, type "UP" and press XMIT. This will put you in edit update mode. (See #3 above.)

#### 2.11.1.4.7 (01-01-2000)

##### Logging Off the Terminal

- (1) Do not log off when in edit mode or during execution of one of the CRX programs. To get out of CTS mode, type **XCTS** and press XMIT. To terminate Text Editor, type EXIT and press XMIT. If a program is executing, wait until an SOE has returned to the screen — do not type one in yourself.
- (2) To log off the terminal, type @FREEM,T then press XMIT.
- (3) Do not walk away from the terminal for more than a few minutes while logged on — the system will log you off if it receives no input within a specified time interval. (It will display TIMEOUT WARNING before logging you off.) This could cause significant loss of your input.
  - a. If you are in CTS, **SAVE** or **REP** your work, then exit CTS, **XCTS**, then use the ECL command @**HOLD** to make the terminal wait for up to ten minutes.
  - b. If in the Text Editor, use the "wait" command for a specific number of seconds.
  - c. If you are not in either editing mode, use the @HOLD command directly. This command allows ten minutes to elapse without further input. When you return to the terminal, press XMIT to release the hold.
  - d. If you are leaving the room, always log off with the @FREEM,T command. This will prevent unauthorized use of the terminal in your absence.

#### 2.11.1.5 (01-01-2008)

##### Special TCC Processing

- (1) FORM-LETTERS — Letters are created, revised, and deleted using a demand terminal (UNISYS 6800) at TCC. IPF/CTS should be used to make corrections and/or revisions to the letter on the CTWF. It can also be used to review the letter error file and the CARF. Three programs are provided to retrieve, validate, and/or delete letters on the MMLF:
  - CRX5[/] is used to retrieve a letter from the MMLF and store it on the CTWF for revisions. It can also retrieve a FORM-WITH-CHNG-INDICATORS from the CQRF to enable review of the new or revised letter. See IRM 2.11.1.5.1.
  - Program CRX51 is used to validate a letter after it has been created or revised. Any errors are written to a file which can be reviewed using CTS. If there are no errors, the program rennumbers letter lines and fill-ins, sets change indicators, and stores the letter on the CQRF. See IRM 2.11.1.5.2.
  - Program CRX52 is used to input CRRSPNDX-ACTION-RECORDs to indicate the letters which have been reviewed and are ready to be placed (replaced) on the MMLF. These records are stored on the CARE and are used to create the FORM-LETTER-LIST-TCC at the end of each update cycle. This program can also be used to delete obsolete letters from the MMLF.

#### 2.11.1.5.1 (01-01-2008)

##### Retrieving FORM-LETTERS from Correspondex Files

- (1) To retrieve an existing letter, use Program CRX5[/]. This requires three lines of input in the following format:
  - a. @XQT C.CRX5[/]
  - b. nnnnaa — the FORM-LETTER-NUM to be retrieved.



- c. "M" or "Q" — file from which the letter will be retrieved. "M" is MMLF, "Q" is CQRF.

**Note:** Program CRX5[slash0] will prompt the user for elements (b) and (c).

- (2) If the letter is successfully retrieved, the terminal response is: RECORD WAS RETRIEVED FROM FILE. A copy of the letter will be stored on the CTWF where it can be changed or reviewed using the text editor. Otherwise, error messages will appear on the screen. ( See Exhibit 2.11.1-4. for a list of possible error messages.) Check the input syntax and FORM-LETTER-NUM used and re-enter both lines of input (as prompted by the program).

2.11.1.5.2  
(01-01-2008)  
**Validating Letter Input**

- (1) Program CRX51 is used to validate a FORM-LETTER-TCC that has been edited and is on the CTWF. The command format is — @XQT C.CRX51
- (2) If there are no errors, the terminal response is: RECORD WAS ADDED TO THE CQRF. This means that the letter on the CTWF is valid and has been added to the CQRF as a FORM-WITH-CHNG-INDICATORS. If this is a correction of a letter already on the CQRF, the message displayed is: RECORD WAS REPLACED ON CQRF. This program rennumbers all LETTER-LINE-NUMs and FILL-IN-NUMs and sets change indicators for all fields that have been added or changed.
- (3) If the letter contains errors, the terminal response is: LETTER CONTAINS ERRORS. SEE ERROR FILE. The user should then review the error file to display the error messages. ( See Exhibit 2.11.1-4. for a list of error messages.) The commands to review the error file are:

**CTS**

**Text Editor**

**@CTS**

**@ED,R CRX-ERRORS**

**OLD CRX-ERRORS**

**P!**

**P ALL**

- (4) When the errors have been reviewed, get out of CTS by typing "**XCTS**" or terminate editor by typing EXIT and press XMIT. Then return to the CTWF to correct the errors noted on the CRX-ERRORS file. Re-execute CRX51 to validate your changes. It may be necessary to execute Program CRX51 several times before all errors have been corrected.

2.11.1.5.3  
(01-01-2000)  
**Correspondex Action Records**

- (1) Program CRX52 is used to input CRRSPNDX-ACTION-RECORDS. It is used after letters that have been added or revised and placed on the CQRF (by CRX51) have been reviewed for correctness. It is also used to delete obsolete FORM LETTERS. This program requires three lines of input in the following format:
- a. @XQT C.CRX52
- b. nnnnaa — the FORM-LETTER-NUM.
- c. x — is the action.

<u>ENTER</u>	<u>ACTION</u>
A	ADD a form letter
D	DELETE a form letter
R	REPLACE a form letter

**Note:** Enter “E” or “@EOF” to terminate the program.

- (2) If the message “ACTION RECORD WAS ADDED TO FILE” is displayed, all necessary files were successfully accessed and additional action records may be input. If this message is not displayed, correct the error indicated and re-enter the action record. If a FORM-LETTER was deleted from the NMLF and could not be added to the CQRF, the program will attempt to rewrite the FORM-LETTER to the NMLF. If additional error messages indicate that the FORM-LETTER could not be rewritten, contact the Computer Systems Analysts to check the NMLF. You may input more than one FORM-LETTER-NUM and action to Program CRX52. Press XMIT after each input line and wait for CRX52 to respond before typing the next line. Type only one FORM-LETTER-NUM and action per line. After you have input the last FORM-LETTER-NUM and action and a message has returned, type @EOF after the SOE symbol and press XMIT.
- (3) Do not input more than one action for the same FORM-LETTER-NUM during any one update cycle.

#### 2.11.1.5.4 (01-01-2000)

#### Updating OMB Clearance Records

- (1) Use the text editor to input OMB-UPDATE-RECs. These are used to update OMB-CLEARANCE-NUMBER-RECORDs both at TCC and at the Service Centers. ( See Exhibit 2.11.1-9. for the input format.)
  - a. @CTS or @ED,U CX-OMB-INPUT.
  - b. **OLD CX-OMB-INPUT.**
  - c. Then, if you’re using Text Editor, type CASE UPPER and press XMIT to enable lower case type to be treated as upper case.
  - d. Each record is input on a separate line. If you’re in Text Editor, first press XMIT to go into input mode.
  - e. The format for each line is: **OMxx[/][/]C[/-b]aaaaaaaaaaaaaaaaaaaaaaaa**



<u>ENTER</u>	<u>DEFINITION</u>
OM	Required
xx	Alpha (upper or lower case) or numeric (01–99) OMB code
2 spaces	Required
C	Required
1 space	Required
a	ACTION CODE "A", "D", "R"; ADD, DELETE or REPLACE
ffffff	FEDERAL TAX FORM NUMBER
nnnnnnnn	OMB CLEARANCE NUMBER
dddddddd	Optional OMB EXPIRATION DATE in MMDDCCYY format

- f. Blank spaces at the end of the input record do not have to be keyed in at the terminal.
- g. Press XMIT after each line of input.
- h. Review your work. Text Editor users should press XMIT again to go into edit mode to review and correct data.
- i. When all records have been input, type **REP CX-OMB-INPUT**. to save your work, (XMIT), then **XCTS**, (XMIT), to get out of CTS. Text Editor users type EXIT and press XMIT to terminate the text editor.

2.11.1.5.5  
(01-01-2000)  
**Monthly TCC Updates**

- (1) Run descriptions for TCC Correspondex update batch programs are listed below. These programs must be run in the following order to produce the monthly Correspondex updates.
  - a. Interactive tasks CRX5[slash0], CRX51, and CRX52 are used to input all necessary FORM-LETTER changes. CTS should be used to input any OMB-CLEARANCE-NUMBER-RECORD updates.
  - b. Program CRX53 — When all action records for a given update cycle have been input, schedule Program CRX53 to produce the FORM-LETTER-LIST-TCC. Program CRX53 also produces the FORM-LETTER-EXHIBITS-TCC for all added and revised letters. It also moves these letters from the CQRF to the MMLF. Copies of the FORM-LETTER-LIST-TCC and FORM-LETTER-EXHIBITS-TCC should be mailed to the Service Centers as soon as possible to notify the letter technicians of the changes on the FORM-LETTERS-TCC.
  - c. Program CRX54E — After the MMLF has been updated, Program CRX54E reformats the MMLF and creates the disc file NATIONAL-MASTER-LETTER-FILE [CRX5411]. (Run CRX54F will produce a copies for each service center.) CRX5412 is another file produced from this run. This file will contain the CES SPECIAL CHARACTERS and CES MESSAGES used by the CORRESPONDEX EXPERT SYSTEM. Program CRX54E also produces the OMB-EXPIRATION-LIST-TCC. This should be reviewed and the responsible analyst contacted if there are letters whose OMB-EXPIRATION-DT is within 6 months of expiration.
  - d. Program CRX55 — Scheduled on an as-needed basis, this program will update the OMB-CLEARANCE-NUMBER-FILE with any changes to the

clearance information of Federal Tax Forms. It produces the OMB-CLEARANCE-UPDATE-FILE, which is used at the centers to update the OMB information on the CNLF. (Run CRX55C will produce a copy of this file for each service center.) All adds, deletes, and revisions are listed on the OMB-CLEARANCE-UPDATE-REPORT.

- e. Program CRX66 — the last program in the monthly update cycle, it initializes the CARF, CQRF, and the CX-OMB-INPUT files for the next month's updates. Since all prior updates are erased from the files, it is important to ensure that the previous programs in the update cycle have been completed successfully.

2.11.1.5.6  
(01-01-2000)  
**TCC Utility Programs**

- (1) Run descriptions for Correspondex utility batch programs are listed below.
  - a. Program CRX6[slash]0 — will format and print a FORM-LETTER-EXHIBIT-TCC for every FORM-LETTER on the MSC-MASTER-LETTER-DISC.
  - b. Program CRX67E — will reconstruct the MMLF from the MSC-MASTER-LETTER-DISC. It can be used if the MMLF is lost or damaged. Run Controls and a list of all FORM-LETTERS which could not be added to the MMLF will be printed at the end of the job.

2.11.1.5.7  
(01-01-2000)  
**TCC Quarterly Statistical Reports**

- (1) Run CRX70 — Within two weeks following the end of the calendar quarter, each service center will send a tape copy of file CRX0312 to the TCC Tape Library. (Use Run CRX[slash]3Q to produce the tape copy.) This TCC production run extracts the current QUARTER-N-CUM for each national and local letter from each service center tape and computes the national volume for each letter. Three statistical reports are generated. C-LETTER-LIST and L-LETTER-LIST display the usage statistics for national letters and local letters, respectively. For each letter, they show the QUARTER-N-CUM for each service center, as well as the quarterly national volume (NAT-VOL) and the year-to-date volume (YTD-VOL). LOW-USAGE-LIST isolates those C-LETTERS with a YTD-VOL of 50 or less. In addition, two recirculating tape files are generated to carry statistics from one quarter to the next. Copies of the reports will be distributed by the TCC Correspondex Unit.

2.11.1.6  
(01-01-2008)  
**Special Service Center Processing**

- (1) FORM-LETTERS-SC can be created, revised, and deleted at the service centers using a demand terminal (UNISYS 2200/4800). CTS should be used to make corrections and/or revisions to the letter on the CTWF, as well as review the letter error file (Program CRX5B) and the CARF. Also, the CX-CNLF-UPDT file (CRX6920) can be updated with changes to the CNLF using CTS. Three programs are provided to retrieve, validate and/or delete letters on the NMLF and SMLF:
  - Program CRX5A is used to retrieve a letter from the NMLF or SMLF and store it on the CTWF for revisions. It can also retrieve a FORM-WITH-CHNG-INDICATORS from the CQRF to enable review of the new or revised letter. See IRM 2.11.1.6.1.
  - Program CRX5B is used to validate a letter after it has been created or revised. Any errors are written to a file which can be reviewed using CTS. If there are no errors, the program rennumbers letter lines and fill-ins, sets change indicators, and stores the letter on the CQRF. See IRM 2.11.1.6.2.

- Program CRX5C is used to input CRRSPNDX-ACTION-RECORDs to indicate the letters which have been reviewed and are ready to be placed on the SMLF or NMLF. The CRRSPNDX-ACTION-RECORDs are stored on the CARF and are used to create the FORM-LETTER-LIST-SC at the end of each update cycle. The program also allows obsolete letters to be deleted from the SMLF.

#### 2.11.1.6.1 (01-01-2000)

##### Retrieving FORM-LETTERS from Correspondex Files

- (1) To retrieve an existing letter, use Program CRX5A. This requires three lines of input in the following format:
  - a. @XQT C.CR5A
  - b. nnnnaa — the FORM-LETTER-NUM to be retrieved.
  - c. f — the file from which the letter will be retrieved.

ENTER	THEN
"N"	— the letter will be retrieved by the NMLF.
"Q"	— the letter will be retrieved from the CQRF. This will allow a new or revised letter to be reviewed and corrected.
"S"	— the letter will be retrieved from the SMLF.

**Note:** Program CRX5A will prompt the user for elements (b) and (c).

- (2) If the letter is successfully retrieved, the terminal response is: RECORD WAS RETRIEVED FROM FILE. A copy of the letter is stored on the CTWF, where it can be changed or reviewed. Otherwise, error messages will appear on the screen. ( See Exhibit 2.11.1-4. for a list of error messages.) Check the input syntax and FORM-LETTER-NUM used and reenter all three lines of input (as prompted by the program).

#### 2.11.1.6.2 (01-01-2000)

##### Validating Letter Input

- (1) Program CRX5B is used to validate a FORM-LETTER that is on the CTWF after it has been edited. The command format is: — @XQT C.CR5B
- (2) If there are no errors, the terminal response is: RECORD WAS ADDED TO THE CQRF. This means that the letter on the CTWF is valid and has been added to the CQRF as a FORM-WITH-CHNG-INDICATORS. If this is a correction of a letter already on the CQRF, the message displayed is: RECORD WAS REPLACED ON CQRF. This program rennumbers all LETTER-LINE-NUMs and FILL-IN-NUMs and sets change indicators for all fields that have been added or changed.
- (3) If the letter contains errors, the terminal response is: LETTER CONTAINS ERRORS. SEE ERROR FILE. The user should then review the error file to display the error messages. The commands to review the error file are:

**CTS****@CTS****OLD CRX-ERRORS****P ALL****Text Editor****@ED,R CRX-ERRORS****P!**

- (4) When the errors have been reviewed, get out of CTS by typing **XCTS**, or terminate Text Editor by typing EXIT and press XMIT. Then return to the CTWF to correct the errors noted on the CRX-ERRORS file. Re-execute CRX5B to validate your changes. It may be necessary to repeat these steps several times before all errors have been corrected.

2.11.1.6.3  
(01-01-2000)

**Correspondex Action  
Records**

- (1) After a letter has been properly edited, validated, and placed on the CQRF, a CRRSPNDX-ACTION-RECORD must be added to the CARF by Program CRX5C. This record will confirm what action must be taken on each letter on the CQRF. It is also used to delete obsolete FORM-LETTERS. This program requires three lines of input in the following format:
- @XQT C.CR5C**
  - nnnnaa** — the FORM-LETTER-NUM.
  - x** — is the ACTION-CD. Valid actions are:

**ENTER****ACTION****A****ADD a form letter****D****DELETE a form letter****R****REPLACE a form letter**

(This is the only action code valid if the FORM-LETTER-NUM ends in "C" or "CT").

**Note:** Enter "E" or "@EOF" to terminate the program.

- (2) If the message "ACTION RECORD WAS ADDED TO FILE" is displayed, all necessary files were successfully accessed and additional action records may be input. If this message is not displayed, correct the error indicated and re-enter the action record. If a FORM-LETTER was deleted from the SMLF and could not be added to the CQRF, the program will attempt to rewrite the FORM-LETTER to the SMLF. If additional error messages indicate that the FORM-LETTER could not be rewritten, contact the Computer Systems Analysts to check the NMLF. You may input more than one FORM-LETTER-NUM and action to Program CRX5C. Press XMIT after each input line and wait for CRX5C to respond before typing the next line. Type only one FORM-LETTER-NUM and action per line. After you have input the last FORM-LETTER-NUM and action and a message has returned, type @EOF on the next line after the SOE symbol and press XMIT.
- (3) Do not input more than one action for the same FORM-LETTER-NUM during any one update cycle.

2.11.1.6.4

(01-01-2003)

**Service Center Versions  
of "C" Letters.**

- (1) See IRM 21.3.3 for instructions of when to create service center versions of "C" letters.
- (2) If it is necessary to create an authorized Service Center version of a "C" Letter, the procedure to follow is:
  - a. Retrieve the FORM-LETTER-TCC from the NMLF with Program CRX5A.
  - b. Revise the FORM-LETTER-NUM with CTS. The new FORM-LETTER-NUM will have the same FORM-NUMERIC-ID as the "C" Letter. The SERVICE-CENTER-CD-ALPHA will be that of the requesting service center. See Exhibit 2.11.1-3..) Any other changes to the letter should then be made using CTS commands. ( See IRM 2.11.1.4.5.)
  - c. Validate the Letter using Program CRX5B. If the letter is valid it will be added to the CQRF. If there are errors, review the error file, make necessary corrections, and re-validate the letter. See IRM 2.11.1.6.2.
  - d. When the letter is on the CQRF, create a CRRXPNDX-ACTION-RECORD for the letter using Program CRX5C. The FORM-LETTER-NUM will have the same FORM-NUMERIC-ID and SERVICE-CENTER-CD-ALPHA input to Program CRX5B. The ACTION-CD must be "A".
  - e. At the end of the update cycle Program CRX5D will then add the revised "C" Letter from the CQRF to the SMLF. The service center letter should be deleted when a corrected "C" Letter is transmitted.

**Note:** Service Centers are able to change the number of copies of letters to be generated by using command code LETED. Changes input in this manner will remain in effect unless they are revised again using LETED. It is no longer necessary to change the NUM-OF-COPIES field of the LETTER-HEADER monthly after the new MSC-MASTER-LETTER-DISC is implemented.

2.11.1.6.5

(01-01-2008)

**Updating OMB  
Clearance Records**

- (1) Use CTS to input OMB-CLEARANCE-UPDATE-RECs-SC. These are used to update OMB-CLEARANCE-NUMBER-RECs at the Service Centers. ( See Exhibit 2.11.1-9. for the input format.)
  - a. @CTS (@ED,UQ CX-CNLF-UPDT.)
  - b. **OLD CX-CNLF-UPDT.**
  - c. Each record is input on a separate line. Number your lines with CTS line numbers, or press XMIT to go into input mode if using Text Editor.
  - d. The format for each line is as follows:  
OMxx[/][/]a[ffffffffffnnnnnnnnnddddddd]

<u>ENTER</u>	<u>DEFINITION</u>
OM	Required
xx	Alpha (upper or lower case) or numeric (01–99) OMB code
4 spaces	Required
a	ACTION CODE must be “R”; REPLACE
ffffff	FEDERAL TAX FORM NUMBER
nnnnnnnn	OMB CLEARANCE NUMBER
dddddddd	Optional OMB EXPIRATION DATE in MMDDCCYY format

- e. Blank spaces at the end of the input record do not have to be keyed in at the terminal.
- f. Press XMIT after each line of input.
- g. If you are using Text Editor, press XMIT again to go into edit mode to review and correct data.
- h. When all records have been input, type **REP CX-CNLF-UPDT.** and press XMIT. Then type **XCTS** to get out of CTS, or EXIT if you’re using Text Editor, and press XMIT.

#### 2.11.1.6.6 (01-01-2000)

##### Updating Preaddressee Address Records

- (1) Use the text editor to input PREADDRESSEE-UPDATE-RECORDs. These are used to update PA-NAME-AND-ADDR-RECs at the Service Centers. Up to three types of input record may be used to update a PA-NAME-AND-ADDR-REC. ( See Exhibit 2.11.1-10.for the input formats.)
  - a. **@CTS** (@ED,UQ CX-CNLF-UPDT.)
  - b. **OLD CX-CNLF-UPDT.**
  - c. Each type of PREADDRESSEE-UPDATE-RECORD is input on a separate line. Number your lines with CTS line numbers, or press XMIT to go into input mode if you are using Text Editor.

#### 2.11.1.6.6.1 (01-01-2000)

##### INPUT FIELDS FOR PREADDRESS RECORDS

- (1) The CRRSPNDX-UPDATE-ID. The valid input code is PAan. “PA” — PA-LITERAL. Identifies the NON-LETTER-RECORD as a PREADDRESSEE-UPDATE-RECORD.
  - “a” — PREADDRESSEE-CD. An alpha code to identify a particular pre-addressee address on the CNLF. Valid codes are A–Z.
  - “n” — PA-SEQUENCE-NUM. A numeric code that determines the placement of the record within the address. Valid codes are “1”, “2”, and “3”.
- (2) The ACTION-CD. The ACTION-CD for PAa1 must be “A”, “D”, or “R”. ACTION-CD “D” with PAa1 will delete the entire Preaddressee record from the CNLF. The ACTION-CD for PAa2 and PAa3 must be “A” or “R”. If the ACTION-CD for PAa1 is “A”, PAa3 must be input with ACTION-CD “A”.
- (3) The next field consists of name and address data. PAa1 is required. It must have a NAME-LINE-1, followed by NAME-LINE-2 or blanks.

- (4) PAa2 may be input with NAME-LINE-3, followed by NAME-LINE-4 or blanks. NAME-LINE-3 is valid input only if NAME-LINE-2 is present and NAME-LINE-4 is valid only if NAME-LINE-3 is present. If PAa2 is input with ACTION-CD "R" and both NAME-LINE-3 and NAME-LINE-4 are blank, NAME-LINE-3 and NAME-LINE-4 will be deleted from the PA-NAME-AND-ADDR-REC on the CNLF. PAa2 is optional.
- (5) PAa3 is required. It must have a STREET-ADDR or blanks, followed by the CITY-STATE-ZIP. The city, state, and Zip Code are required input and must be formatted as: city; comma; valid two character state abbreviation; one blank; a five or nine digit Zip Code. (i.e. ANYTOWN,MD 21995)
- (6) Blank spaces between input elements must be keyed in as blanks at the terminal. Blank spaces at the end of the input record do not.
- (7) Press XMIT after each line of input.
- (8) Text Editor users need to press XMIT again to go into edit mode to review and correct data.
- (9) When all records have been input, type **REP CX-CNLF-UPDT.** and XMIT. Then exit CTS by typing **XCTS**, or type EXIT and press XMIT to terminate Text Editor.

**Note:** The following characters are invalid for any PREADRESSEE-UPDATE-REC. "=", "[and]".

2.11.1.6.7  
(01-01-2008)  
**Updating Return  
Address Records**

- (1) Use CTS to input RETURN-ADDRESS-UPDATE-RECORDs. These are used to update RETURN-ADDRESS-RECs at the Service Centers. ( See Exhibit 2.11.1-13. for the input format.)
  - a. **@CTS** (@ED,UQ CX-CNLF-UPDT.)
  - b. **OLD CX-CNLF-UPDT.**
  - c. Each RETURN-ADDRESS-UPDATE-REC is input on a separate line. You will need to number your CTS lines, or if you are still using Text Editor, first press XMIT to go into input mode.

2.11.1.6.7.1  
(01-01-2000)  
**INPUT FIELDS FOR  
RETURN-ADDRESS-  
UPDATE-RECORDS**

- (1) The CRRSPNDX-UPDATE-ID. The valid input code is RA<sub>vv</sub>.
  - "RA" — RA-LITERAL. Identifies the NON-LETTER-UPDATE as a RETURN-ADDRESS-UPDATE-RECORD.
  - "vv" — RETURN-ADDRESS-CD. A two character code to identify a particular return address on the CNLF. Valid codes are [slash0]1–99 or AA–ZZ.
- (2) The ACTION-CD. For a RETURN-ADDRESS-UPDATE-RECORD, it must be "A", "D", or "R".
- (3) The next field is made up of RETURN-ADDRESS address data. A RETURN-ADDRESS must have a STREET-ADDR or blanks followed by the CITY-STATE-ZIP. The city, state, and Zip Code are required input and must be formatted as: city; comma; valid two character state abbreviation; one blank; a five or nine digit Zip Code. (i.e. HOMETOWN,IA 454991234)
- (4) Blank spaces between input elements must be keyed in as blanks at the terminal. Blank spaces at the end of the input record do not.



- (5) Press XMIT after each line of input.
- (6) Text Editor users will need to press XMIT again to go into edit mode to review and correct data.
- (7) When all records have been input, type **REP CX-CNLF-UPDT.** and XMIT. Then to get out of CTS type **XCTS**, or type EXIT and press XMIT to terminate Text Editor.

**Note:** The following characters are invalid for any RETURN-ADDRESS-UPDATE-RECORD: period ".", "=", "[and]". A hyphen inside of a zip code is also invalid.

#### 2.11.1.6.8 (01-01-2008)

##### Updating Signature Title Records

- (1) Use CTS to input SIGNATURE-TITLE-UPDATE-RECs. These are used to update SIGNATURE-TITLE-RECs at the Service Centers. ( See Exhibit 2.11.1-14. for the input format.)
  - a. **@CTS** (@ED,U CX-CNLF-UPDT.)
  - b. **OLD CX-CNLF-UPDT.**
  - c. Each SIGNATURE-TITLE-UPDATE-REC is input on a separate line. Use CTS line numbers. For Text Editor, press XMIT to go into input mode.

#### 2.11.1.6.8.1 (01-01-2003)

##### Update Fields for Signature Title Records

- (1) The CRRSPNDX-UPDATE-ID. The valid input code is STvv.
  - "ST" — ST-LITERAL. Identifies the NON-LETTER-UPDATE as a SIGNATURE-TITLE-UPDATE-REC.
  - "vv" — SIGNATURE-TITLE-CD. A two-character code to identify a particular signature title on the CNLF. Valid codes are 00–99 and AA–ZZ.
- (2) The LASER-SIGNATURE-CD. Required on all records except the 00 record. It must be 0001–0036.
- (3) The ACTION-CD. The ACTION-CD for a SIGNATURE-TITLE-UPDATE-REC must be "A", "D", or "R".
- (4) The next field consists of a SIGNATURE-NAME and/or a SIGNATURE-TITLE.
  - ST00 — Code "00" identifies a blank record with no name or title. Both fields must be blank.
  - Staa — Codes AA–ZZ or 01-99 identify two line records containing a signature name and signature title. These codes require input of a SIGNATURE-NAME followed by a SIGNATURE-TITLE
- (5) Blank spaces between input elements must be keyed in as blanks at the terminal. Blank spaces at the end of the input record do not.
- (6) Press XMIT after each line of input.
- (7) Text Editor users, press XMIT again to go into edit mode to review and correct data.
- (8) When all records have been input, type **REP CX-CNLF-UPDT.** and XMIT. Then to exit CTS, type **XCTS**, to exit Text Editor, type EXIT and press XMIT.

**Note:** The following characters are invalid for any SIGNATURE-TITLE-UPDATE-REC: "=", "[and]".



2.11.1.6.9  
(01-01-2008)  
**Updating Special Insert  
Records**

- (1) Use CTS to input SPECIAL-INSERT-UPDATE-RECORDs. These are used to update SPECIAL-INSERT-RECs at the Service Centers. ( See Exhibit 2.11.1-15. for the input format.)
  - a. **@CTS** (@ED,UQ CX-CNLF-UPDT.)
  - b. **OLD CX-CNLF-UPDT.**
- (2) Each SPECIAL-INSERT-UPDATE-RECORD is input on a separate line with a CTS line number. Or, if you must, first press XMIT to go into Text Editor input mode.

2.11.1.6.9.1  
(01-01-2000)  
**INPUT FIELDS FOR  
SPECIAL-INSERT-  
UPDATE RECORDS**

- (1) The CRRSPNDX-UPDATE-ID. The valid input code is Slaa.
  - “SI”— SI-LITERAL. Identifies the NON-LETTER-UPDATE as a SPECIAL-INSERT-UPDATE-RECORD.
  - “aa” — SPECIAL-INSERT-CD. A two character alpha code to identify a particular special insert on the file. Valid codes are AA–ZZ.
- (2) The ACTION-CD. The ACTION-CD for a SPECIAL-INSERT-UPDATE-RECORD must be “A”, “D”, or “R”.
- (3) The third field is made up of SPECIAL-INSERT data. Slaa may have up to 34 characters of variable data followed by “J”. A FILL-IN-DELIMITER must be included as part of the SPECIAL-INSERT-UPDATE-RECORD.
- (4) Blank spaces between input elements must be keyed in as blanks at the terminal. Blank spaces at the end of the input record do not have to be keyed in at the terminal.
- (5) Press XMIT after each line of input.
- (6) If you are still using Text Editor, press XMIT again to go into edit mode to review and correct data.
- (7) When all records have been input, type **REP CX-CNLF-UPDT.** Then, to exit CTS, type **XCTS**, or to leave Text Editor type EXIT and press XMIT.

**Note:** The following characters are invalid for any SPECIAL-INSERT-UPDATE-RECORD. “=” and “[”.

2.11.1.6.10  
(01-01-2008)  
**Updating  
Employee-Num-Sig-Title-  
Records**

- (1) Use CTS to input EMPLOYEE-NUM-SIG-UPDATE-RECs. These are used to update EMPLOYEE-NUM-SIG-TITLE-RECs at the Service Center. ( See Exhibit 2.11.1-16. for the input format.)
- (2) To begin entering codes:

For Text Editor, type	For CTS, type
@ED,UQ CX-CNLF-UPDT and press XMIT.	@CTS and press XMIT.
	OLD CX-CNLF-UPDT and press XMIT

- (3) Each EMPLOYEE-NUM-SIG-UPDATE-REC is input on a separate line. First press XMIT to go into input mode (text editor only).
- (4) Input fields for EMPLOYEE-NUM-SIG-UPDATE-RECs are as follows.
  - The CRRSPNDX-UPDATE-ID. The valid input code is Evvv.
  - “E” — EN-LITERAL. Identifies the NON-LETTER-UPDATE as an EMPLOYEE-NUM-SIG-TITLE-REC.
  - “vvv” — EMPLOYEE-NUM-CD. A three digit numeric code which corresponds with the third, fourth and fifth digits of the IDRS employee number for the area for which a “default” SIGNATURE-TITLE-CD is desired. (For example, all employees in Adjustments might have “[slash0][slash0]5” as the third, fourth and fifth digits of their IDRS employee numbers. You may want all “[slash0][slash0]5” to default to SIGNATURE-TITLE-CD “SF”. Valid codes are [slash0][slash0][slash0]–999.
  - The ACTION-CD. The ACTION-CD for an EMPLOYEE-NUM-SIG-UPDATE-REC must be “A”, “D” or “R”.
  - The EN-SIG-TITLE-CD. A two character code to identify a particular signature title on the CNLF. These two characters must match with one of the SIGNATURE-TITLE-CDs on the SIGNATURE-TITLE-RECs.
- (5) Blank spaces between input elements must be keyed in as blanks at the terminal. Blank spaces at the end of the input record do not.
- (6) Press XMIT after each line of input.
- (7) Press XMIT again to go into edit mode to review and correct data (text editor only).
- (8) When all records have been input, terminate text processing as follows:

For Text Editor, type	For CTS, type
EXIT and press XMIT.	REP and press XMIT.
	XCTS and press XMIT

**Note:** Non-alphabetic and numeric characters are invalid for any EMPLOYEE-NUM-SIG-UPDATE-REC.

2.11.1.6.11  
(01-01-2000)  
**Generating a  
SPECIAL-LETTER-USE-  
REPORT (Run CRX62)**

- (1) The parameters necessary to generate a SPECIAL-LETTER-USE-REPORT are input by the console operator at the time of program execution. These parameters should be provided to the Scheduler by the Service Center Letter Technician when a report is needed.
- (2) Program CRX62 will generate one of three types of SPECIAL-LETTER-USE-REPORTS, depending upon the REPORT-REQUEST-PARAMETERS input by the console operator. These parameters differ for each type of report, as follows:
  - a. QUARTER — This will print all letters on the LETTER-USE-FILE, with the QUARTER-N-CUMS for the current and all prior quarters. It will also provide cumulative totals for each quarter.

System queries and operator responses	
SYSTEM:	PLEASE ENTER YOUR DESIRED OPTION (D,C,Q,E):
RESPONSE:	Q

- b. **DATE** — This report generates information on letter usage between any two dates in the current quarter, inclusively. It will display the number of each FORM-LETTER produced between the two dates provided, as well as a total number of letters produced during that time. This report will also list the accumulated quarter count, for the current quarter, of all FORM-LETTERS which are present on the report.

System queries and operator responses	
SYSTEM:	PLEASE ENTER YOUR DESIRED OPTION (D,C,Q,E):
RESPONSE:	D
SYSTEM:	PLEASE ENTER START DATE (MM/DD):
RESPONSE:	Starting date for report, in MM/DD format.
SYSTEM:	PLEASE ENTER END DATE (MM/DD):
RESPONSE:	Closing date for report, in MM/DD format.

- c. **COUNT** — This report generates a list of all FORM-LETTERS which have a volume at least as large as the COUNT provided in at least one quarter of the current calendar year. If COUNT is zero, a list of all FORM-LETTERS which have a zero volume in at least one quarter will be generated.

System queries and operator responses	
SYSTEM:	PLEASE ENTER YOUR DESIRED OPTION (D,C,Q,E):
RESPONSE:	C
SYSTEM:	PLEASE ENTER COUNT NUMBER (NNNNNN):
RESPONSE:	Desired count [slash0][slash0][slash0] [slash0][slash0][slash0]–999999 (leading zeroes required).

- a. CTS and interactive tasks CRX5A, CRX5B, and CRX5C are used to input all necessary FORM-LETTER updates. CTS is also used to input all NON-LETTER-RECORD updates.
- b. Program CRX5D — When all action records for a given update cycle have been input, schedule Program CRX5D to move the letters from the CQRF to the NMLF or the SMLF, as directed by the CRRSPNDX-ACTION-RECs on the CARF. It will also produce the FORM-LETTER-LIST and the FORM-LETTER-EXHIBITS for all letters added or revised.
- c. Program CRX54 — If any “C” letters are revised, schedule Program CRX54 to copy the NMLF to disc. This file is then input to Program CRX58 (see below). It also produces the OMB-EXPIRATION-LIST-TCC for “C” letters. If no corrections were made to “C” letters the MSC-MASTER-LETTER-DISC transmitted by TCC should be merged with the SC-MASTER-LETTER-DISC.
- d. Program CRX57 — Copies the SMLF to tape. This file is then input to Program CRX58 (see below). Program CRX57 also produces the OMB-EXPIRATION-LIST-SC for service center letters.
- e. Program CRX58 — After the NMLF and SMLF have been updated, Program CRX58 is run to merge the MSC-MASTER-LETTER-DISC and the SC-MASTER-LETTER-DISC. This produces the SEQUENCED-MASTER-LETTER-DISC, which is used in end-of-day processing to produce TAXPAYER-LETTERS. CRX58 also extracts letter validity data from FORM-LETTERS and outputs this information on file CRX5821. Another database is created with total letter on it. This database (CORRESPONDEX-LETTER-DATABASE) is used by the CC LREVV to format a letter on the IDRS screen.
- f. Program CRX59 — will access the CLVF using the FORM-LETTER-NUM as a key to extract the RESTRICT-AVAILABILITY-INDs and BYPASS-QR-INDs and NUM-OF-COPIES which have been set by CC LETED. Program CRX59 uses these 3 indicators to update CRX5821 file and output the updated records on file CRX5921.
- g. Program CRX56 — will update the CNLF, which is maintained at each center and contains all current OMB clearance information for Federal Tax Forms, preaddressee addresses, return addresses, signature titles, and special inserts. The OMB-CLEARANCE UPDATE-FILE (CRX5512) from TCC and the NON-LETTER-UPDATE-FILE (CRX6920) may both be input to Program CRX56. A list of all OMB clearance information, preaddressee addresses, return addresses, signature titles, and special inserts that were updated is output by this program. Invalid update records are also printed.
- h. Program CRX68 uses file CRX5921 (see above) to produce the CLVF, which is used to validate real-time input.
- i. Program CRX66S — this is run as the last program in the monthly update cycle to initialize the CARF, CQRF, and the CX-CNLF-UPDT files. After Program CRX66S is run, all prior updates are erased from the files and a new series of updates may be input.

2.11.1.6.13  
(01-01-2000)  
**Daily Service Center  
Programs**

- (1) Correspondex Command Codes are used to initiate the daily computer generation of letters. See IRM 2.11.1.2.1 for a list of all Correspondex Command Codes.

- (2) Program CRX[slash]1 — This batch program will sort and delete daily letter requests. It produces a file of letters to be printed (CRX[slash]12[slash] ) and a list of those letter requests which were deleted from the LETTER-REQUEST-FILE (via CC LPAGD).
- (3) Program CRX[slash]3 — This batch program merges the FORM-LETTER on the SEQUENCED-MASTER-LETTER-DISC with the data on the LETTER-REQUEST-FILE to produce TAXPAYER-LETTERS. For each letter request, if there is a matching SELECTED-LETTER-REQUEST, the selected letter date (usually the current date plus 1 work day) is printed on the TAXPAYER-LETTER. For each letter request where there is no matching SELECTED-LETTER-REQUEST, the current date plus 3, 4, or 5 work days is the date printed on the TAXPAYER-LETTER. Program CRX[slash]3 also updates the CRRSPNDX-LETTER-USE-FILE and produces the DAILY-LETTER-USE-REPORT, the LETTER-ERROR-LIST and the SELECTED-LETTER-ERROR-LIST. The DAILY-LETTER-USE-REPORT contains counts of FORM-LETTER use for that day and accumulated quarter counts for the current quarter. The LETTER-ERROR-LIST is a list of letter requests which could not be formatted for print. The SELECTED-LETTER-ERROR-LIST is a list of erroneous FORM-LETTER-NUMs on the SELECTED-LETTER-REQUEST file. Schedule Run CRX[slash]3Q on the first day of each calendar quarter to produce a disc copy of file CRX[slash] 312. This disc should be FTP'ed to TCC within two weeks for use as input to Run CRX7[slash]. See IRM 2.11.1.5.7.

2.11.1.6.14  
(01-01-2000)  
**Service Center Utility  
Programs**

- (1) Program CRX6[slash] — will print a FORM-LETTER-EXHIBIT-TCC for every FORM-LETTER on the MSC-MASTER-LETTER-DISC. Each exhibit includes letter header data at the top of each page and the text of the letter.
- (2) Program CRX61 — performs the same function as Program CRX6[slash] for the SC-MASTER-LETTER-DISC.
- (3) Program CRX62 — is a utility that produces the SPECIAL-LETTER-USE-REPORT, and may be run on an as-needed basis. The Service Center Letter Technician must provide the REPORT-REQUEST-PARAMETERs to the scheduler. See IRM 2.11.1.6.11. for an explanation of these parameters. See IRM 2.11.1.2.3. for explanations of the different REPORT-TYPEs that Program CRX62 produces.
- (4) Program CRX65 — will initialize (or rebuild) the SMLF from the SC-MASTER-LETTER-DISC. Run Controls and a list of all FORM-LETTERS which could not be added to the SMLF will be printed at the end of the job.

2.11.1.7  
(01-01-2008)  
**Creating the SERP copy  
Introduction (formerly  
IDRS Correspondex  
Document 6548)**

- (1) Under the old system, on a monthly basis the TCC Letter Technicians would enter changes, updates, and additions to the National Master Letter Disc (file CRX5411) on the Unisys UTS-20 terminal, using a series of runs including programs CRX50, CRX51, CRX52, CRX53, and CRX54. There will be no change to this procedure. The Letter Technicians also typed all revisions and new letters into the Wang to produce a "camera copy" to be sent to the printer to produce the monthly Correspondex Document 6548. The new programs will eliminate the need to enter the letter text twice.
- (2) The Streamline CRX system begins with a one-time run, CRX07A, necessary to initialize the MSAM (Multi-Indexed Sequential Access Method) file, CRX07A20. This run can be maintained in the run library to use in case file CRX07A20 is ever wiped out, but otherwise, never needs to be scheduled

again. CRX07A20 is the MASTER-COMMENT-FILE, which is accessed using the form letter number as a key. The MASTER-COMMENT-FILE consists of everything that goes into the SERP copy which is not part of a C letter, and therefore has no business on the MASTER-LETTER-TAPE. This includes heading information, such as transmittal number, title, originating office, etc. It also includes Notes, which generally appear at the bottom of the document.

- (3) Once file CRX07A20 exists, the Letter technician, working at a Unisys UTS-20, will first @ADD one of two files — CRX-ASG1 or CRX-ASG2. These files contain the ECL required to run programs CRX07 and CRX08. If only 1 Letter Technician is logged on, then he/she may choose either file. If two Letter Technicians want to work on the streamline system at the same time, then one must @ADD CRX-ASG1, and the other must @ADD CRX-ASG2.
- (4) After @ADDING the proper file, execute CRX07 to fetch an already existing comment record off the MASTER-COMMENT-FILE and put into a workfile for editing. If this is a new record, execute CRX07 to format a blank workfile with prompts and aids to create a new record.
- (5) At this point the user must go into CTS or IPF to enter the comments. The comments will be stored in the file named WKFILE (CRX0720 if using CRX-ASG1 or CRX0721 if using CRX-ASG2). When all comments have been entered, execute CRX08, the interactive demand program that will validate and update the comment record to the MASTER-COMMENT-FILE. Any errors encountered when using CRX08 may be viewed on the screen or will exist in the file ERR-FILE (CRX0820 if using CRX-ASG1 or CRX0821 if using CRX-ASG2). To look at this file on the screen, use CTS or IPF. The Letter Technician may use CTS/IPF to go back and forth between WKFILE and ERR-FILE until all mistakes are corrected.
- (6) The Letter Technicians must also create a small file, CRX0901, consisting of the form letter numbers that they want printed. This can be done in CTS/IPF, and can be done once after all the monthly updates of the letters have been done, or can be amended after each form letter is worked on. It is not necessary to input the form letter numbers in numerical order as the Run ECL for CRX09N/CRX09S will sort them.
- (7) CRX09S can be run one or more times per month. CRX09S is scheduled when a local letter has been changed. It will take in the file CRX0901, and for each form letter number, get the comments off the MASTER-COMMENT-FILE and the letter text from the SC-MASTER-LETTER-DISC. It will merge the two and write a record to disk file CRX0920. CRX09S will also produce two printed reports, CRX0941, a listing of errors, if any, and CRX0943, run controls. Disk file CRX0920 contains the actual letters and can be downloaded to a PC to make changes to the text if necessary. Tape file CRX0910 also contains the actual letters and can be sent to directly to the laser printer.
- (8) CRX09N is run only in TCC. It is the same as CRX09S above except it uses the MSC-MASTER-LETTER-DISC (CRX5411) as input. The MASTER-COMMENT-FILE is CRX07N20 and the little file used for requests is CRX0902.



## 2.11.1.7.1

(01-01-2008)

**Files used to create the SERP copy**

- (1) MSC-MASTER-LETTER-DISC (CRX5411) — Contains all the text in the 'C' letters. This tape is output from Run CRX54E and will be the input to Run CRX09N.

**Note:** The system file name for this file is TCC\*CRX5411.

- (2) SC-MASTER-LETTER-DISC (CRX5711) — Contains all the text in the Service Center letters and local letters. This tape is output from Run CRX57 and will be input to CRX09S.
- (3) MASTER-COMMENT-FILE (CRX07A20) — Disk file containing everything that goes in the SERP copy but is not part of a C letter. This file will be input to Run CRX09S.

**Note:** For CRX09N, the system file name for this file is CRX07N20.

- (4) CRX-ASG1 — This file allows the Letter Technicians to run programs CRX07 and CRX08. It must be @ADDED at the beginning of the terminal session. The ECL statements within the file will map the programs and assign the files needed. For instructions on maintaining this file see the CRX CPB.
- (5) CRX-ASG2 — This file has the same functions as CRX-ASG1. CRX-ASG2 was added to this system to allow two Letter Technicians to work with programs CRX07 and CRX08 at the same time. The only difference between the two files is the system file names for WKFILE and ERR-FILE. For instructions on maintaining this file see the CRX CPB.
- (6) WKFILE — This is the file that the Letter Technician will use CTS or IPF to edit or create a comment record. This file is produced after executing CRX07 on the demand terminal. After the editing is completed this file will be input for the demand run CRX08.
- (7) ERR-FILE — This file is created by program CRX08 and contains the error messages that must be corrected in WKFILE before CRX08 will update the MASTER-COMMENT-FILE.
- (8) CRX0901 — This file is used by the Letter Technician to tell Run CRX09S which records to print out in the SERP format. Use CTS or IPF to enter only the form letter number.

**Note:** For CRX09N, the system file name for this file is CRX0902.

- (9) CRX0941 — This is the error listing produced by Run CRX09N/CRX09S.
- (10) CRX0943 — Run controls for Run CRX09N/CRX09S.
- (11) **CRX0910** — Tape file from Run CRX09N/CRX09S. Contains the SERP letters. This tape may be sent to the laser printer instead of downloading CRX0920 to the PC. This is probably faster than using file CRX0920 but you don't have the advantage of spell checking or correcting any errors in the letter.
- (12) **CRX0920** - Disk file from Run CRX09N/CRX09S. Contains the SERP letters. This file can be downloaded to a PC.



2.11.1.7.2  
(01-01-2000)

**Creating or Updating  
Records on the  
MASTER-COMMENT-  
FILE**

- (1) Programs CRX07 and CRX08 are required programs for updating the MASTER-COMMENT-FILE. In order to make these programs work the Letter Technician must enter **@ADD CRX-ASG1.** at the terminal. If two Letter Technicians want to work on this system at the same time; one should enter **@ADD CRX-ASG1.** at his/her terminal and the other should enter **@ADD CRX-ASG2.** at his/her terminal. After completing this you are ready to run CRX07.
- (2) CRX07 — At the terminal enter **@XQT C.CR07** and transmit. The whole purpose of this program is to allow a Letter Technician to change an existing record on the MASTER-COMMENT-FILE or create a new record to go on the MASTER-COMMENT-FILE or delete a record off the MASTER-COMMENT-FILE that may be obsolete. Answer the prompts on the screen. Use "A" or "a" if this is a new record not already on the MASTER-COMMENT-FILE. Use "R" or "r" to retrieve an already existing record. Use "D" or "d" for delete.
- (3) Editing WKFILE — After program CRX07 has completed you are ready to edit WKFILE. At the terminal enter:

**@CTS**

**OLD WKFILE.**

**P +nn** (nn represents the number of lines to print)

See Exhibit 2.11.1-20. for an example of WKFILE with no data or notes in it. To enter comments, be sure your terminal is set for upper and lower case. To do this, press "CONTROL PAGE", tab to the last two fields, and enter "UC/NO", then press "CONTROL PAGE" again. It is important to remember that WKFILE is a data file and **not** a command code. The literals and prompts in the file are not protected nor are there tab stops. **Do not write over or move the prompts or literals.** Run CRX08 will give an error message and not allow an update. If you accidentally move a prompt or literal, move it back to where it was. Remember you can always run CRX07 again to bring in a fresh copy of the file if a literal or prompt was accidentally moved or deleted and you can't figure out where it belongs. **Do not add or delete lines prior to line #49.** Use the arrow keys to move from fill-in to fill-in. Enter the data to the right of the ">". If using CTS remember to enter line by line to save your changes. IPF (full screen) may fill in the whole screen before transmitting. Lines 1 through 4 and lines 37 through 44 are informational instructions. The line numbers on the left are created by CTS and **NOT** part of the workfile. They will always be numbered starting with 1 and incremented by 1 after you run CRX07.

- (4) Fields to be filled in on the WKFILE:
  - a. FORM-LETTER-NUMBER — This is usually already there; **use leading zeroes.** EX: 0000C 0012C 0384C
  - b. TRANSMITTAL NUMBER — Must be numeric, 99–99.
  - c. ORIGINATING OFFICE — Must enter at least one character. Maximum allowed characters is 12. EX: R:R:T
  - d. DATE OF ISSUE — Must be entered in **MM-DD-CCYY** format. Valid month range: 1–12, valid day range 1–31, valid year range 60–99 or 00–29, century should be 19 or 20.

- e. TITLE — Must enter at least 1 character on the first title line. There are two lines of 67 characters each. The second title line may be left empty if not needed.
  - f. NUMBER OF COPIES — Must enter at least 1 character up to a maximum of 22 characters.
  - g. DISTRIBUTION TO — Must enter at least 1 character up to a maximum of 21 characters.
  - h. FORMER LETTER — This may be left blank, otherwise enter up to 18 characters.
  - i. IMF/BMF — Must enter at least 1 character up to a maximum of 20 characters.
  - j. LETTERS CONSIDERED IN REVISION — This may be left blank. There are two lines of 30 characters each. If your statement is less than 30 characters the second line may be left blank.
  - k. NATURE OF CHANGES — At least 1 character must be entered. May fill in up to two lines of 40 characters. This comment appears at the beginning of the SERP copies.
  - l. REVISION DATA — The first 4 characters must be letter number, **use leading zeroes**. The next two are for the alpha part; “C” or service center alpha. CRX09 will automatically generate the “Letter” in front of this form letter number on the hardcopy. Example: 00Z1C (Rev. 12–90).
- (5) **ENTERING NOTES:** See Exhibit 2.11.1-21. is an example of possible notes. A total of 70 lines are allowed for notes. “[ ]” should be on the very last line of the workfile. If there are no notes for this record, then the ending brackets should be on line #49. It is not necessary to enter asterisks or dotted lines between notes as program CRX09 will provide them.

Begin the first line of each note — “NOTE:” in columns 1 through 7. Enter text in columns 8 through 64. If text is entered past column 64, program CRX08 will give you an error message. If a note is longer than 1 line continue on the next line. Leave columns 1–7 blank and continue text in columns 8–64. Blank lines are allowed within notes but not between two notes. When you are through with a note enter the end bracket “]” on the next line column 1. Begin the next note on the following line. If this is the very last note in the workfile, **do not** enter “]” on the following line, instead, enter the ending brackets “[ ]” in columns 1 & 2. If you want to add more notes to a record that already has notes, such as in the example See Exhibit 2.11.1-21., change the ending brackets on line 60 to “]” and start your new notes on line #61.

- (6) The RESEQUENCE command in CTS may be used to change the CTS line numbers. This may come in handy if you are inserting a note between two already existing notes. However, it is important to remember that program CRX08 will give error messages as if the WKFILE is numbered beginning with 1 and incremented by 1. Example: “**LINE # 63 NOTE TEXT TOO LONG**”. This means that the 63rd line from the top of the file is a note line and text was entered past column 64. If the RESEQUENCE command was used to change the line order while editing the file, example: RES 10,10 (renumber the file beginning with the first line and increment by ten), the CTS line number for the 63rd line would probably be 630. This could become confusing when trying to find errors. It is recommended to use RES 1,1 after all changes have been made and just before REP. This will put the line order back to the way it was after run CRX07.

(7) **CRX08** — Once all changes have been made in WKFILE:

-->RES 1,1

-->REP

-->XCTS

>@XQT C.CRX08

Program CRX08 is an interactive program that will validate the contents of WKFILE and, if there are no errors, write the record to the MASTER-COMMENT-FILE. There are prompts at the beginning of the run. The program does not ask for the form letter number because this will already be in the workfile. The program asks whether this is an (A)DD or (R)eplace. Choose "A" or "a" if this record is new to the MASTER-COMMENT-FILE. Choose "R" or "r" if replacing an already existing record on the MASTER-COMMENT-FILE.

(8) When program CRX08 encounters errors it will either display a message on the screen or write the message to a file called ERR-FILE. and display **"WKFILE CONTAINS ERRORS, SEE ERR-FILE.** At this point CTS may be used to view the file.

Ex:

**OLD ERR-FILE.**

**P!** (print all)

**IMF/BMF FILL-IN IS SPACES**

**OLD WKFILE.** (go directly in to WKFILE. to correct the IMF/BMF error)

**P 23,25** (This is where the IMF/BMF fill-in and prompt are located)

(make changes)

**REP**

**XCTS**

@XQT C.CRX08

You may switch back and forth between ERR-FILE. and WKFILE. while in CTS or IPF until all errors have been corrected.

- (9) After CRX08 updates the MASTER-COMMENT-FILE the following displays will be on the screen:

**0012C WAS ADDED (OR 0012C WAS REPLACED)**

**@SYM,U WKFILE.,,PR FOR PRINTOUT**

**END PROGRAM CRX08**

If you want a copy for your records, move the cursor to the right of the "PR" and transmit. This will give one copy with no line numbers. If more than 1 copy is desired, enter the number between the two commas. To make a copy with CTS line numbers on the left, the SITE command may be used while in CTS. See Exhibit 2.11.1-18. for an example of the SITE command.

2.11.1.7.3  
(01-01-2000)  
**RUN CRX09S (At TCC  
this run is CRX09N)**

- (1) Building the CHANGED-LETTER-REQUEST-FILE (CRX0901) — In order for Run CRX09S to know what records to print-out, a small file — CRX0901 must be created using CTS or IPF:

**@CTS**

**OLD CRX0901 (This file is CRX0902 at TCC)**

**>100 0012C**

**>200 0238C**

**>300 8001C**

**REP**

**XCTS**

The values on the left (100,200,300) are CTS line numbers. You may number any way you wish — (1,2,3,etc. or 10,20,30,etc). Leave one space after the CTS line number. The numbers to the right are the form letter numbers. **USE LEADING ZEROS.** The form letter numbers do not have to be in numeric order as a sort in Run CRX09S will place them in numeric order. Remember to enter for each line if using CTS. Do not leave any lines blank. When all form letters numbers have been entered save (REP) and exit (XCTS).

- (2) Once the CHANGED-LETTER-REQUEST-FILE (CRX0901) has been created and the corresponding COMMENT-RECORDS have been updated, Run CRX09S may be scheduled. Run CRX09S will use CRX0901 to decide which records to print out in the SERP format. At the normal completion of this run, 3 disk files will be printed.
- (3) CRX0943 contains the run controls for Run CRX09N/CRX09S. TOTAL REQUESTS READ should equal TOTAL LETTERS PRINTED + TOTAL ERROR REQUESTS.  
CRX0941 is the error listing for Run CRX09N/CRX09S. The following are examples of error messages:
  - a. NO REQUEST TO PROCESS — CRX0901 contains no records.
  - b. INVALID LETTER ENTRY \*\* REQUEST OMITTED — Invalid form letter number on CRX0901
  - c. NO SUCH LETTER ON MASTER LETTER TAPE FILE — Can not find the record on the CRX5411 (CRX5711 if in the service center).
  - d. MSAM RECORD NOT FOUND — Can not find the record on the MASTER COMMENT FILE CRX07A20 (CRX07N20 at TCC).
  - e. LETTER REQUEST ABORTED IN PROCESSING — Contact National Office programmers.
  - f. CRX0920 is the disk version of the SERP copy. It can be downloaded to a PC.

2.11.1.8  
(07-01-2004)

#### Creating Knowledge Base groups and rules

- (1) The knowledge base (KB) contains a list of commands which will assist the user by grouping opening, closing and mutually exclusive paragraphs and by using rules to indicate the need for selecting certain paragraphs and enclosures.
- (2) Below is an example of how a KB could be set up in the text of the letter. The KB area(s) are directly below the letter header and before the body of the letter. Line numbers are required. The KB stuff is entered in the same area as the letter text columns 11-80.

**Each group and rule must be followed (delimited) by a semi-colon ;**

L3	1	0086C	S 082003 341 014 260 249 20 000
001		*group code	
002		s1 CDEFGHI; m1 JKL; m2 MN; m3 OPQRS; m4 UVW; e1 cdefg;	
003		*end	
004		*rule	
005		if /PR then /lmn; if Q then /STXY026;	

006	if /PR then /STUVW0123456789;
007	if h then /ijk; if /ijk then h; if a then *b; if j then ?;
008	*end
009	A Taxpayer Identification Number: =====
009F	1 A 01M46L012T

- (3) There is a limit of 20 lines for all the Knowledge Base. Blank lines are not allowed. If a letter doesn't have groups or rules then begin the body of the text as you always have in the past.  
A letter may have both groups and rules, or just group codes without rules, or just rules without group codes.

2.11.1.8.1  
(07-01-2004)

#### Group code breakdown

- (1) The group codes are as follows:

<b>*group code -</b>	This is how you begin the group code area, nothing else on the line except LETTER-LINE-NUM. Begins in column 11.
<b>s1 -</b>	- indicates to the program that one of these paragraphs must be used as an OPENING paragraph. These selective paragraphs are also mutually exclusive of each other.
<b>m1 -</b>	- indicates to the program that these selective paragraphs are not to be used together within the letter. Any subsequent groups of mutually exclusive paragraphs can be numbered m2, m3, etc. If you need more than 9 groups, re-use the numbers; m1, m2, m3.
<b>e1 -</b>	- Indicates to the program that one of these paragraphs must be used as a CLOSING paragraph. These selective paragraphs are also mutually exclusive of each other.
<b>*end -</b>	This is how you end a group, nothing else on the line except LETTER-LINE-NUM. Begins in column 11.

**Note:** In group codes, the limit for the number of selectives that you can put in one contiguous string is 20.

2.11.1.8.2  
(07-01-2004)

#### Rules breakdown

- (1) rules should be set up as follows:

**\*rule** This is how you begin the rule area. \*rule begins in column 11. Nothing else on the line except LETTER-LINE-NUM

**if...then...;** rules consist of an “if” (or If), some type of statement followed by a “then” and another statement and ending with a “,”

Example: if A then J; This is the simplest rule – Paragraph A requires paragraph J and conversely paragraph J requires paragraph A.

2.11.1.8.3  
(07-01-2004)  
**rule symbols are:**

(1) / if a '/' is preceding a group of paragraphs, it indicates to the program that AT LEAST ONE of these paragraphs must be selected.  
**Note:** '/' should never be used as a selective paragraph. Any case where a rule would require the '/' as a selective paragraph, then the whole rule must not be used.

Examples: if A then /EF; (if A is chosen then E or F must be chosen)  
if /AB then F; (if A or B is chosen then F must be chosen)  
if /AB then /EF; (if A or B is chosen then E or F must be chosen)

**&** if a & is preceding a group of paragraphs , it indicates to the program that ALL the paragraphs must be selected.  
**Note:** '&' should never be used as a selective paragraph. Any case where a rule would require the '&' as a selective paragraph, then the whole rule must not be used.

Examples: if A then &BC; (if A is used then both B and C are required)  
if /ab then &BC; ( if either a or b are used then both B and C are required).  
The ampersand is always on the right side of 'then' and has two or more selectives following. If you have more than 1 selectives following the '&' do not use the '/'.

**\*** This is the NOT statement. Indicates that the selective(s) following '\*' are not to be used.



Examples: if A then \*B; ( if A then not B)  
 if A then \*/BC; ( if A then not B or C)  
 If you have more than 1 selectives following the '\*', use the '/'.

? - Indicates to the program that the user should place a 'Y' in the enclosure indicator ENC> of the LPAGE screen. This is for the blank fill-ins within the enclosure area that are used to tell correspondence/machine services that there is a personal attachment to be sent back. Chances are if people are calling in complaining that they want the fill-in but don't have a personal attachment then they are not using the fill-in for what it was meant for, or the enclosure area is not set up proper, or maybe they are using the wrong letter. The work around is to put a 'Y' in ENC> and ignore the 5703 screen

Examples: if z then ?; ( paragraph z requires a 'Y' in the ENC> prompt of LPAGE screen)  
 if /xyz then ?; (if paragraph x or y or z are used then put a 'Y' after ENC>.)  
 The question mark always follows the 'then' with nothing else but the semi-colon.

\*end This is how you end the rules area, nothing else on the line except LETTER-LINE-NUM. \*end begins in column 11.

In rules the limit for the number of selectives (on the right side of 'then') that you can string together is 25.

2.11.1.8.4  
 (01-01-2005)  
**KNOWLEDGE BASE  
 ERROR MESSAGES**

- (1) It helps if you understand how the program (CRX51 or 5B) works with a rule: All spaces are eliminated and the data is moved into a field until it finds a semi-colon. If you forget a semi-colon the program gets confused and you can have unpredictable results. 'if /AB then C;' becomes 'if/ABthenC;' becomes 'if/AB@@@@@C;' 'then' is overwritten with '@@@@@' so that it won't be confused with a selective paragraph. Position 3 begins the selective paragraph area and position 8 is the first selective after the 'then'. Any references to RIGHT or LEFT are in relation to 'then'.

NO KB IN  
LETTER –

Not really an error message; just a reminder.  
Ignore if you don't have a KB in your letter. This  
displays on the screen after running CRX51/  
CRX5B if a letter has no KB areas.

**1st STAGE VALIDATION BEFORE THE  
PROGRAM KNOWS WHETHER IT IS WORKING  
WITH A RULE OR GROUP:**

KB HEADER  
OR \*end  
STARTING IN  
COL 10 -

The KB areas must begin in column 11. Two other  
messages check for columns 12 and 13.

TOO MANY  
\*ends

GROUP OR  
RULE  
WITHOUT \*end

\*end FOUND  
ON 1ST LINE

KB STUFF  
FOUND BUT  
NOT ON 1ST  
LINE

TOO MANY  
GROUP OR  
RULE  
HEADERS

BLANK LINE  
FOUND IN KB  
SET

RULE OR  
GROUP NOT IN  
PROPER  
ORDER

EMPTY GROUP  
OR RULE

SELECTIVES  
NOT ALLOWED  
IN KB AREA –

Found a selective paragraph (column 9) on a line  
that has KB code.

FILL-IN-LINE-  
IND NOT  
ALLOWED IN  
KB AREA –

Found something in column 3 on a line that has  
KB code

SEMI-COLINS  
MISSING

MISSING SEMI-  
COLIN AT END

SELECTIVE n  
MISSING IN  
LETTER -

Where 'n' is a selective paragraph in a group or rule that does not exist in the letter.

**ERROR MESSAGES FROM GROUP VALIDATION:**

GROUP CODE  
WITH NO s1  
OR m? OR e1

EMPTY GROUP

MORE THAN 20  
SELECTIVES IN  
GROUP

m? WITH ONLY  
1 SELECTIVE

**ERROR  
MESSAGES  
FROM RULE  
VALIDATION:**

TOO MANY /  
OR &

TOO MANY \*  
OR ?

NO IF

MORE THAN 1  
if STATEMENT  
IN RULE

MORE THAN 1  
then  
STATEMENT IN  
RULE

MISSING THEN

INVALID RULE  
–

The program knows that there is something wrong but can't be more specific.

**ERRORS FOUND WHEN ONLY ONE SLASH '/'  
IS FOUND:**

SINGLE SLASH  
NOT FOUND IN  
POSITIONS 3  
OR 8

LEFT SLASH  
WITH NO SE-  
LECTIVES

LEFT SLASH  
WITH ONLY 1  
SELECTIVE

LEFT SLASH  
FOUND WITH  
NOTHING ON  
THE RIGHT OF  
then

LEFT SLASH  
FOUND WITH  
EXTRA CHARS  
ON THE RIGHT  
OF then

FOUND RIGHT  
SLASH;  
INVALID CHAR  
ON LEFT

FOUND RIGHT  
SLASH;  
EITHER 1 OR  
NONE SELEC-  
TIVES TO THE  
RIGHT

FOUND RIGHT SLASH;  
POSITION 4 SHOULD BE @  
-      Position 4 should be the 't' in 'then'.

MORE THAN 25 SELECTIVES FOLLOWING  
then –      The string of selectives on the right hand side of  
'then' can not be greater than 25.

**ERROR  
MESSAGES  
WHEN TWO  
SLASHES  
HAVE BEEN  
FOUND:**

FOUND 2  
SLASHES; 1ST  
IN WRONG  
PLACE

FOUND 1ST  
SLASH WITH 1  
OR NONE SE-  
LECTIVES  
FOLLOWING

2ND SLASH  
DOES NOT  
FOLLOW then

2ND SLASH  
WITH NO  
SELECTIVE  
FOLLOWING

2ND SLASH  
WITH ONLY  
ONE  
SELECTIVE  
FOLLOWING

**ERROR  
MESSAGES  
WHEN AN  
AMPERSAND  
WAS FOUND:**

& IN WRONG  
PLACE

NOTHING  
AFTER &

/ IN WRONG  
POSITION –

Testing a rule that contains a '&'. A slash '/' has  
been found on the right hand side of 'then'

NOT ENOUGH  
SELS AFTER &

TOO MANY  
SLASHES WITH  
&

\* OR ? NOT  
ALLOWED  
WITH &

NOTHING  
FOLLOWING /

ONLY 1 SEL  
AFTER /

NOTHING  
BETWEEN if/  
then

**ERROR  
MESSAGES  
WHEN A  
QUESTION  
MARK IS  
FOUND:**

; REQUIRED  
AFTER ?

? DOES NOT  
FOLLOW then

TOO MANY  
SLASHES WITH  
?

& OR \* NOT  
ALLOWED  
WITH ?

NO SELEC-  
TIVES  
BETWEEN if/  
then

MULTIPLE SE-  
LECTIVES  
WITH NO  
SLASH

LEFT SLASH  
WITH NO SE-  
LECTIVES

LEFT SLASH  
WITH ONLY 1  
SELECTIVE

LEFT SLASH IN  
WRONG  
POSITION

**ERROR  
MESSAGES  
WHEN AN  
ASTERISK IS  
FOUND:**

\* IN WRONG  
PLACE

NOTHING  
AFTER \*

& OR ? NOT  
ALLOWED  
WITH \*

INVALID  
ASTERISK  
RULE

SINGLE SLASH  
NOT FOUND IN  
POSITIONS 3  
OR 9

LEFT SLASH  
WITH NO SE-  
LECTIVES

LEFT SLASH  
WITH ONLY 1  
SELECTIVE

LEFT SLASH  
FOUND WITH  
NOTHING ON  
THE RIGHT OF  
then

LEFT SLASH  
FOUND WITH  
EXTRA CHARS  
ON THE RIGHT  
OF then

FOUND RIGHT  
SLASH;  
INVALID CHAR  
ON LEFT

FOUND RIGHT  
SLASH;  
EITHER 1 OR  
NONE SELEC-  
TIVES TO THE  
RIGHT

FOUND 2  
SLASHES; 1ST  
IN WRONG  
PLACE



FOUND 1ST  
SLASH WITH 1  
OR NONE SE-  
LECTIVES  
FOLLOWING

2ND SLASH  
DOES NOT  
FOLLOW \*

2ND SLASH  
WITH NO  
SELECTIVE  
FOLLOWING

2ND SLASH  
WITH ONLY  
ONE  
SELECTIVE  
FOLLOWING

**Exhibit 2.11.1-1 (01-01-2000)****Character Reduction for Narrative Fill-ins****If MAX-FILL-IN-LENTH is:****THEN**

Subtract this amount from the Fill-  
IN-LENTH in the IDRS  
Correspondex

**Greater Than****BUT Less Than****(SERP copy)**

37

71

0

65

136

7

135

206

14

205

276

21

275

346

28

345

420

35

**Exhibit 2.11.1-2 (01-01-2000)****Chart for Fill-in Coding.**

<u>Character Position</u>			<u>Character Position</u>		
28	Additional Tax:	10\$/ 12\$	19	Net Operating Loss Year:	32V
35	Address:	32V	29	Payment Dated:	13D
27	Amount of Check:	10\$/ 12\$	35	Penalty:	12\$
26	Amount of Refund:	10\$/ 12\$	36	Period:	13P
22	Amount of Re- mittance:	10\$/ 12\$	35	Person to Contact:	20V/32V
25	Amount of Payment:	10\$/ 12\$	29	Period Ending:	13P
28	Balance of Tax:	12\$	29	Quarter Ended:	13P
31	Check Dated:	13D	28	Quarter Ending:	13P
18	Contact Telephone Number:	12V/ 20V	29	Refund Claimed:	10\$/12\$
27	Date of Payment:	13D	20	Reject Sequence Number	12V
29	Date Received:	13D	27	Schedule Number:	14V
28	Date of Refund:	13D	20	Social Security No.:	12T
34	Decedent:	32V	37	State:	15V
19	Document Locator Number:	17V	34	Tax Form:	10V
28	Effective Date:	13D/P	32	Tax Period:	13P
12	Employer Identification No:	10T	24	Tax Period Covered	13P
	(to carry File Source)				

**Exhibit 2.11.1-2 (Cont. 1) (01-01-2000)****Chart for Fill-in Coding.**

<b><u>Character Position</u></b>			<b><u>Character Position</u></b>		
34	FICA Tax:	10\$/ 12\$	22	Tax Period Beginning:	13D
25	Fiscal Year Ended:	13P	26	Tax Period Ended:	13P
38	Form:	10V	27	Taxpayer's Name:	32V
37	Forms:	20V	32	Tax Return:	7V
31	Form Number:	7V	34	Tax Year:	4Y
39	FTD:	23V	28	Tax Year Ended:	13P
26	Interest Accrued:	10\$/ 12\$	28	Taxable Period:	13P
30	Interest Date:	10\$	30	Taxable Year:	4Y
26	IRS Batch Number:	8V	24	Tax Year beginning:	13D
31	Kind of Tax:	32V	12	Taxpayer Iden- tification No.:	12T/12V
38	Name	35V	31	Type of Tax:	32V
38	Street Address	35V	38	Wages Reported:	10\$/12\$
38	City, State, and Zip	35V	28	Year:	4Y
21	Net Capital Loss Year	32V	25	Your Letter Dated:	13D

Note 1: Text Editor Users — Character Position at TCC and the Service Centers will be relative to the Start-of-entry (SOE) symbol when in input mode or to the last character of the Text Editor command if in edit mode.

Note 2: The figures above are guidelines and should be referenced as such. Exceptions are allowed.

**Exhibit 2.11.1-3 (01-01-2000)**  
**Codes Indicating Letter Origin**

**National Letters. FORM-LETTER-TCC-CODE.**

<u>Code</u>	<u>Meaning</u>
C	National "C" Letter
CT	National Training Letter

**Service Center Letters. SERVICE-CENTER-CD-ALPHA.**

<u>Code</u>	<u>Meaning</u>
AN	Andover Service Center
AT	Atlanta Service Center
AU	Austin Service Center
B [slashb]	Brookhaven Service Center
CS	Cincinnati Service Center
F[slashb]	Fresno Service Center
KC	Kansas City Service Center
M[slashb]	Memphis Service Center
O[slashb]	Ogden Service Center
P[slashb]	Philadelphia Service Center

**Local Letters. LOCAL-LETTER-CODE.**

<u>Code</u>	<u>Meaning</u>
LN	Andover Service Center
LT	Atlanta Service Center
LU	Austin Service Center
LB	Brookhaven Service Center
LC	Cincinnati Service Center

**Exhibit 2.11.1-3 (Cont. 1) (01-01-2000)****Codes Indicating Letter Origin****National Letters. FORM-LETTER-TCC-CODE.**

LF	Fresno Service Center
LK	Kansas City Service Center
LM	Memphis Service Center
LO	Ogden Service Center
LP	Philadelphia Service Center

**Exhibit 2.11.1-4 (01-01-2000)****Error Messages.**

<b><u>ERROR-TYPE</u></b>	<b><u>ERROR MESSAGE TEXT</u></b>
(Common and I/O)	
01	INVALID INPUT SYNTAX, REENTER
02	FILE I/O ERROR, REENTER
03	FILE NOT AVAILABLE
04	RECORD WAS NOT FOUND ON FILE
05	DUPLICATE RECORD ON FILE
06	RECORD WAS RETRIEVED FROM FILE
07	RECORD WAS ADDED TO FILE
08	RECORD WAS REPLACED ON FILE
09	RECORD WAS DELETED ON FILE
AA	FORM LETTER IS NOT NUMERIC
AB	FORM-LET NOT MCC OR SC LETTER
AC	FORM LETTER NOT LOCAL LETTER
AD	INVALID LETTER CODE
AE	CRRSPNDX-FILE-CODE NOT N,S,Q
AF	CRRSPNDX-FILE-CODE NOT M OR Q
AG	FORM-LETTER-CODE NOT C OR CT
AH	MCC FORM-LTR-NUM NOT 9 [slash0][slash0]1
AI	ACTION-CD NOT A, D, OR R
(Validate)	
10	NO HEADER -LINE PRESENT
11	NUM-OF-COPIES NOT 1, 2, or 3
12	FORM-LETTER-NUM INVALID
13	PREADDRESEE-IND NOT P, BLANK
14	SP-IND NOTS OR BLANK
15	SALUTATION-LINE-NUM NOT 1-[slash0]15
16	SALUTATION-LINE-NUM NOT = [slash0][slash0] [slash0]
17	FILL-IN LINE MISSING F IN COL. 4
18	SIG-TITLE- LINE NOT PRESENT



**Exhibit 2.11.1-4 (Cont. 1) (01-01-2000)****Error Messages.**

<b><u>ERROR-TYPE</u></b>	<b><u>ERROR MESSAGE TEXT</u></b>
19	FILL-IN LINE NUM NOT = PREVIOUS LINE NUM
20	CLSNG-PAR -LINE NOT PRESENT
21	NUM-CLSNG -LINES NOT NUMERIC
22	NUM-CLSNG -LINES INCONSISTENT
23	EJECT-LINE -NUM NOT [slash0][slash0] [slash0] , [slash0]16 -950
24	EJECT-LINE NOT PRESENT
25	EJECT-LINE NOT AFTER CLOSURE
26	OMB-IND NOT BLANK, [slash0], OR 1
27	OMB-CLEARANCE-NUM NOT BLANK
28	OMB-EXPIRATION-DT NOT BLANK
29	LETTER-REVISION-DT IS INVALID
30	LINE-NUM NOT BLANK OR [slash0][slash0] [slash0]- 950
31	LINE-NUM NOT GREATER OR EQUAL
32	FILL-IN-LINE-IND NOT F, BLANK
33	NO NARRATIVE-LINE FOR FILL-IN
34	SELECTIVE-PARA AND SP-IND OFF
35	NO SELECTIVE-PARA, SP-IND ON
36	
37	FILL-IN-LINE NOT IN SAME SP
38	SP-CD NOT IN A-Z, [slash0]- 9 SEQUENCE
39	SIG-TITLE- LINE NOT BLANK
40	MORE THAN 5 FILL-INS PRESENT
41	RA AND OTHER FILL-IN ON LINE
42	CLSING-PARA-LINE IS SELECTIVE
43	RA-FILL-IN LENGTH ERROR
44	NARRATIVE-FILL-IN LENGTH ERROR
45	FILL-IN-START-POSITION OVERLAP
46	FILL-IN IS TOO LONG FOR LINE

**Exhibit 2.11.1-4 (Cont. 2) (01-01-2000)****Error Messages.**

<b><u>ERROR-TYPE</u></b>	<b><u>ERROR MESSAGE TEXT</u></b>
47	NARRATIVE-FILL-IN NOT LAST
48	= CHARS DO NOT MATCH FILL-IN
49	EJECT-LINE IN SELECTIVE-PARA
50	FILL-IN-NUM NOT NUMERIC
51	FILL-IN-NUM NOT ASCENDING
52	FILL-IN-START-POSITION INVALID
53	FILL-IN-LENGTH NOT [slash0][slash0]1– [slash0][slash0]1 –420
54	FILL-IN-LENGTH INCONSISTENT
55	FILL-IN-REQUIRED-IND NOT M, E
56	PRINT-JUSTIFICATION-CD INVALID
57	FILL-IN-VALIDATION-CD INVALID
58	RA FILL-IN CODES INCONSISTENT
59	FI-VALIDATION-CD INCONSISTENT
60	OM-LITERAL INVALID
61	OMB-CD NOT AA–ZZ OR [slash0]1– 99
62	FED-TAX-FORM-NUM NOT PRESENT
63	OMB-CLEARANCE-NUM NOT NUMERIC
64	OMB-EXPIRATION-DT INVALID
65	ACTION-CD NOT A, D, OR R
66	RA-CD NOT AA–ZZ OR [slash0]1– 99
67	SI-CD NOT AA–ZZ
68	ST-CD NOT AA–ZZ OR 00–99
69	FILL-IN-DELIMITER MISSING
70	UPDATE-ID LITERAL INVALID
71	PREADDRESSEE-CD NOT A–Z
72	PA-SEQUENCE-NUM NOT 1, 2, OR 3
73	PA-NAME-LINE-1 IS BLANK
74	PA-NAME-LINE-3, LINE-2 BLANK

**Exhibit 2.11.1-4 (Cont. 3) (01-01-2000)****Error Messages.**

<b><u>ERROR-TYPE</u></b>	<b><u>ERROR MESSAGE TEXT</u></b>
75	PA-NAME-LINE-4, LINE-3 BLANK
76	PA-CITY IS INVALID OR BLANK
77	PA-STATE- CD IS INVALID
78	PA-ZIP-CD ID NOT NUMERIC
79	PA-RECORD IS INCOMPLETE
80	PA-SEQ-NUM 2 or 3 and ACTION D
81	RA-CITY IS INVALID OR BLANK
82	RA-STATE-CD IS INVALID
83	RA-ZIP-CD NOT NUMERIC
84	NO COMMA BETWEEN CITY, ST-CD
85	NO BLANK BETWEEN ST-CD ZIP-CD
86	ST-CD [slash0][slash0]–9 FIELD 2 NOT BLANK
87	ST-CD NOT 00, FIELD 2 IS BLANK
88	ST-CD [slash0][slash0], FIELD 1 NOT BLANK
89	ST-CD NOT [slash0][slash0] AND FIELD 1 BLANK
90	DUPLICATE NON-LETTER-UPDATE-ID
91	OMB UPDATE AND ACTION-CD NOT R
92	FORM-LETTER-MCC, ACTION NOT R
93	LINE IS NOT PRESENT ON LETTER
94	DUPLICATE LINE NUM ON LETTER
95	NEW-PARA-LINE-SEQ-NUM INVALID
96	BAD CHAR IN PA, RA, SI, or ST
97	LOCAL LETTER NUMBER NOT 9[slash0][slash0] [slash0]
98	LASER-SIG-CD NOT [slash0][slash0] [slash0]1-[slash0][slash0]99
99	LASER-SIG-CD SHOULD BE BLANKS
100	SALUTATION-LINE-NUM NOT BLANK
101	SALUTATION-LINE-NUM NEEDED
102	PRECEDING SAL-LINE NOT BLANK

**Exhibit 2.11.1-4 (Cont. 4) (01-01-2000)****Error Messages.**

<b><u>ERROR-TYPE</u></b>	<b><u>ERROR MESSAGE TEXT</u></b>
103	FOLLOWING SAL-LINE NOT BLANK
104	CLSNG-PARA-NUM INCONSISTENT
105	NUM-OF-CLSNG-LINES NOT [slash0][slash0] –35
106	SIGNATURE-FILL-IN-VAL-CD NOT “S”
107	MCC OR SCF-LTR-NUM NOT 9[slash0][slash0] 1
108	LETTER CODE INVALID
109	NUM OF BLANK LINES IN SIG-AREA NOT 3–5
110	LITERAL “SINCERELY YOURS” NOT FOUND
111	SIG-TITLE-FI-LINE(S) MISSING
112	LINE BELOW SIG-TITLE-LINE NOT BLANK
113	
114	MCC-LETTER-CODE NOT “C” OR “CT”
115	“S” FI-CD NOT ALLOWED IN THIS AREA
116	EN-CD NOT [slash0][slash0] [slash0]–999
117	EN-SIG-TITLE-CD NOT [slash0]1–99 OR AA –ZZ
118	EN-SIG-CD, ST-CD MISMATCHED
119	= CHARS DO NOT HAVE FILL-INS
120	SIG-TITLE-LINE-NUM NOT NUMERIC
121	SIG-TITLE-LINE-NUM NOT [slash0]16–950
122	CLSING-PAR-LINE-NUM NOT [slash0][slash0] [slash0], [slash0]16 –950
123	EJECT-LINE-NUM NOT [slash0][slash0] [slash0], [slash0]16 –950
124	EJECT-LINE-NUM NOT NUMERIC
125	MORE THAN 73 SELECTIVE-PARA-CDs
126	EPMF-LETTER-CD NOT “C” OR “CT”
127	
128	ACTION-CD FOR OLD EN REC NOT D (DELETE)
129	CES-MSG CHARACTER NOT a, c, g OR m
130	CES-MSG NUMBER NOT NUMERIC (00–99)
131	CITY/STATE/ZIP INVALID

**Exhibit 2.11.1-4 (Cont. 5) (01-01-2000)****Error Messages.****ERROR-TYPE   ERROR MESSAGE TEXT**

132	CITY/STATE/ZIP INCONSISTENT
	SP-CD NOT A-Z, 0-9, a-z, BLANK, '+', OR '-' OR !#\$%&/:;<>V//
	SP-CD NOT IN A-Z, 0-9, a-z OR !#\$%&/:;<>V// SEQUENCE

## Exhibit 2.11.1-5 (01-01-2008)

## Example of a letter in SERP format

Department of the Treasury	Transmittal Number 99-04	Date of Issue 02/19/1999
	Originating Office OP:C:F:P	Form Number 0206C

IDRS  
CORRESPONDEX

Internal  
Revenue  
Service

---

Title: Refund Inquiry; Copy of Check Requested/Check Being Traced  
(Form FMS 1133)

---

Number of Copies Original and 1	Distribution to: 2 to T/P	Former Letter 0206C (Rev. 08-95)
OMB Clearance Number -	Expires	IMF/BMF

## Letters Considered in Revision:

	Taxpayer Identification Number:	[01 12T]	
	Tax Period(s):	[02 13P]	[03 13P]
		[04 13P]	[05 13P]
	Form:	[06 9V]	
A]	Date of Check:	[07 13D]	
B]	Amount of Check:	\$(08 12\$)	
C]	Symbol Number:	[09 4V]	
D]	Check Number:	[10 8V]	
		[11 17V]	

Dear [-30V]

E] Thank you for your inquiry [12 5A] [13 13D].

F] We received a letter dated [14 13D], from [15 20V]. We have no record that you authorized [16 4V] to act for you in this matter. Please notify [17 4V] that we replied only to you.

G] We share your concern about your refund check, and we hope the matter will be resolved soon.

H] We asked the Financial Management Service (the office that issues refund checks) for a copy of your check. We will forward the copy to you within the next [18 3V] days if the check has been cashed.

I] Our records show that we received a claim for nonreceipt of a refund check from you on [19 13D]. We are now tracing the check in response to your claim. The claim you sent us recently, dated [20 13D] appears to be a duplicate of the one you sent us earlier. Therefore, we are returning it for your records.

Letter 0206C (Rev. 07-98)

**Exhibit 2.11.1-6 (01-01-2008)****Input Format. FILL-IN-LINE.****FOR SERVICE CENTER USE ONLY (TCC See Exhibit 2.11.1-25.)**

<b><u>Name</u></b>	<b><u>Start Pos</u></b>	<b><u>Length</u></b>	<b><u>Remarks</u></b>
LETTER-LINE-NUM	1	3	Key in all 3 numerics, or allow program CRX5B to number the lines for you automatically.
FILL-IN-LINE-IND	4	1	F
FILLER	5	1	Blank
NUM-OF-FILL-IN-CD-SECTIONS	6	1	Numeric
FILLER	7	1	Blank
SELECTIVE-PARA-CD	8	1	Blank or selective paragraph code
FILLER	9	1	Blank
FILL-IN-CD-SECTION			There will be 1 to 5 per line with a space in between each
FILL-IN-NUM	10	2	Both numerics must be keyed in
FILL-IN-REQUIRED-IND	12	1	E or M
FILL-IN-START-POS	13	2	Must be 11–80 or spaces
PRINT-JUSTIFICATION-CD	15	1	A, J, L, N, or R
MAX-FILL-IN-LENGTH	16	3	Must be 001–420
FILL-IN-VALIDATION-CD	19	1	1, \$, A, S, N, P, T, D, Y, or V
FILLER	20	1	Blank
FILLER	65	15	Blanks

**Exhibit 2.11.1-7 (01-01-2000)****Input Format. LETTER-HEADER-LINE.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
OUTPUT-CD	1	2	L3
FILLER	3	6	Blanks
NUM-OF-COPIES	9	1	1, 2, or 3
FILLER	10	2	Blanks
FORM-LETTER-NUM			
FORM-NUMERIC-ID	12	4	All 4 numerics must be keyed in
SERVICE-CENTER-CD-ALPHA or	16	2	See Exhibit 2.11.1-3.
LOCAL-LETTER-CODE or	16	2	See Exhibit 2.11.1-3.
FORM-LETTER-MCC-CODE	16	2	C or CT
FILLER	18	4	Blanks
PREADDRESSEE-IND	22	1	P or Blank
FILLER	23	1	Blank
SELECTIVE-PARA-IND	24	1	S or Blank
FILLER	25	1	Blank
LETTER-REVISION-DT			
REVISION-DT-MONTH	26	2	MM
REVISION-DT-CENTURY	28	2	CC
REVISION-DT-YEAR	30	2	YY
FILLER	32	1	Blank
TOTAL-LETTER-LINES	33	3	Blanks
FILLER	36	1	Blank
SALUTATION-LINE-NUM	37	3	000–015
FILLER	40	1	Blank
SIGNATURE-TITLE-LINE-NUM	41	3	016–950
FILLER	44	1	Blank
CLSNG-PARA-LINE-NUM	45	3	000 or 016–950
FILLER	48	1	Blank
NUM-OF-CLSNG-LINES	49	2	00–35



**Exhibit 2.11.1-7 (Cont. 1) (01-01-2000)****Input Format. LETTER-HEADER-LINE.**

<b><u>Name</u></b>	<b><u>Start Pos</u></b>	<b><u>Length</u></b>	<b><u>Remarks</u></b>
FILLER	51	1	Blank
EJECT-LINE-NUM	52	3	000 or 016–950
FILLER	55	1	Blank
OMB-IND	56	1	Blank, [slash0], or 1
FILLER	57	1	Blank
OMB-CLEARANCE-NUM	58	8	Blanks unless OMB-IND is [slash0]
FILLER	66	1	Blank
OMB-EXPIRATION-DT			
OMB-EXPIRATION-DT-MONTH	67	2	MM
OMB-EXPIRATION-DT-DAY	69	2	DD
OMB-EXPIRATION-DT-CC	71	2	CC
OMB-EXPIRATION-DT-YEAR	73	2	YY
FILLER	75	5	Blanks

**Exhibit 2.11.1-8 (01-01-2000)**  
**Input Format.NARRATIVE-LINE****FOR SERVICE CENTER USE ONLY (TCC See Exhibit 2.11.1-26.)**

<b><u>Name</u></b>	<b><u>Start Pos</u></b>	<b><u>Length</u></b>	<b><u>Remarks</u></b>
LETTER-LINE-NUM	1	3	Key in all 3 numerics, or allow program CRX5B to number the lines for you automatically.
FILLER	4	4	Blanks
SELECTIVE-PARA-CD	8	1	Blank or selective paragraph code
FILLER	9	1	Blank
NARRATIVE-TEXT	10	70	Character data — letter text

**Exhibit 2.11.1-9 (01-01-2000)****Input Format. OMB-CLEARANCE-UPDATE-RECORD.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
OM-LITERAL	1	2	OM
OMB-CD	3	2	AA–ZZ (upper or lower) or 01–99
FILLER	5	2	Blanks
MCC-IND	7	1	Must be “C” at TCC Must be blank at Service Centers.
FILLER	8	1	Blank
ACTION-CD	9	1	A, D, or R
FEDERAL-TAX-FORM-NUMBER	10	8	
OMB-CLEARANCE-NUM	18	8	
OMB-EXPIRATION-DT	26	6	MMDDCCYY

Example:

OMJD[/][/]C[/]R1040[/][/][/][/]1545098703311989

**Exhibit 2.11.1-10 (01-01-2000)****Input Format. PREADDRESSEE-UPDATE-RECORD-1.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
PA-LITERAL	1	2	PA
PREADDRESSEE-CD	3	1	A–Z
PA-SEQUENCE-NUM	4	1	“1”
FILLER	5	4	Blanks
ACTION-CD	9	1	A, D, or R
NAME-LINE-1	10	35	
NAME-LINE-2	45	35	

**Note:** This is the first of two or three records required to insert a preaddressee’s full address into the data base.

To add this Address:

Director  
Regional Disbursing Center  
Division of Disbursement  
P.O. Box 7838  
Philadelphia, PA 19101

Requires this input for the first record:

PAX1[/b>[/b>[/b>[/b>ADIRECTOR REGIONAL DISBURSING CENTER

**Exhibit 2.11.1-11 (01-01-2000)****Input Format. PREADDRESSEE-UPDATE-RECORD-2.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
PA-LITERAL	1	2	PA
PREADDRESSEE-CD	3	1	A–Z
PA-SEQUENCE-NUM	4	1	“2”
FILLER	5	4	Blanks
ACTION-CD	9	1	A or R
NAME-LINE-3	10	35	
NAME-LINE-4	45	35	

**Note:** This is the second of two or three records required to insert a preaddressee's full address into the data base. This record is required only if Name Line 3 and/or Name Line 4 are present.

To add this Address:

Director  
Regional Disbursing Center  
Division of Disbursement  
P.O. Box 7838  
Philadelphia, PA 19101

Requires this input for the second record:

PAX2[slashb][slashb][slashb][slashb]A  
DIVISION OF DISBURSEMENT

**Exhibit 2.11.1-12 (01-01-2000)****Input Format. PREADDRESSEE-UPDATE-RECORD-3.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
PA-LITERAL	1	2	PA
PREADDRESSEE-CD	3	1	A–Z
PA-SEQUENCE-NUM	4	1	“3”
FILLER	5	4	Blanks
ACTION-CD	9	1	A or R
STREET-ADDR	10	35	
CITY-STATE-ZIP	45	35	

**Note:** This is the last of the two or three records required to insert a preaddressee's full address into the data base.

To add this Address:

Director  
Regional Disbursing Center  
Division of Disbursement  
P.O. Box 7838  
Philadelphia, PA 19101

Requires this input for the last record:

PAX3[slashb][slashb][slashb][slashb]AP.O. PHILADELPHIA,PA 19101  
BOX 7838

**Exhibit 2.11.1-13 (01-01-2000)****Input Format.RETURN-ADDRESS-UPDATE-RECORD.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
RA-LITERAL	1	2	RA
RETURN-ADDRESS-CD	3	2	01–99 or AA–ZZ
FILLER	5	4	Blanks
ACTION-CD	9	1	A, D, or R
STREET-ADDR	10	35	
CITY-STATE-ZIP	45	35	

Example:

RA99[/][/]RP.O.BOX NASHVILLE,TN 372029876

**Exhibit 2.11.1-14 (01-01-2000)****Input Format. SIGNATURE-TITLE-UPDATE-RECORD.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
ST-LITERAL	1	2	ST
SIGNATURE-TITLE-CD	3	2	[slash0][slash0]–99, AA–ZZ
LASER-SIGNATURE-CD	5	4	[slash0][slash0][slash0]1– [slash0][slash0]99 or blanks
ACTION-CD	9	1	A, D, or R
SIGNATURE-FIELD-1	10	35	SIGNATURE-NAME or SIGNA- TURE-TITLE. 2.11.6.9
SIGNATURE-FIELD-2	45	35	SIGNATURE-TITLE or blank 2.11.6.9

Example:

STAA0007RMARY R. MAXWELL      CRIMINAL INVESTIGATION OFFICER



**Exhibit 2.11.1-15 (01-01-2000)****Input Format. SPECIAL-INSERT-UPDATE-RECORD.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
SI-LITERAL	1	2	SI
SPECIAL-INSERT-CD	3	2	AA–ZZ
FILLER	5	4	Blanks
ACTION-CD	9	1	A, D, or R
SPECIAL-INSERT	10	35	
FILLER	45	35	Blanks

Example:

SIAZ[/][/][/][/]A(901) 555-1212 X301]

**Exhibit 2.11.1-16 (01-01-2000)****Input Format. EMPLOYEE-NUM-SIG-UPDATE-REC.**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
CRRSPNDX-UPDATE-ID			
EN-LITERAL	1	1	E
EN-CD[/][/] [/]–999	2	3	
FILLER	5	4	Blanks
ACTION-CD	9	1	A, D, or R
EN-SIG-TITLE-CD [/][/]99 or AA–ZZ	10	2	
FILLER	12	68	Blanks

Example:

E[/][/]5[/b][/b][/b][/b]ASF

**Exhibit 2.11.1-17 (01-01-2000)**  
**LETTER-ERROR-CDs**

<b><u>VALUES</u></b>	<b><u>MEANINGS</u></b>
A	FILL-IN-NUM in NARRATIVE-LINE is greater than FILL-IN-NUM on GENERATED-LETTER-REQUEST-REC.
B	Mandatory FILL-IN not present.
C	FILL-IN-DATA on GENERATED-LETTER-REQUEST-REC is in excess of NARRATIVE-FILL-IN area available.
E	A FORMATTED-LETTER exceeded the four page line limit.
H	FILL-IN-DATA for a NARRATIVE-FILL-IN contains more than 70 characters without an intermittent blank.
S	The SIGNATURE-TITLE-CODE that was in the GEN-LTR-REQUEST-REC could not be found in the current CNLF database.
X	There was no FORM-LETTER match for this GENERATED-LETTER-REQUEST-REC.
Y	An attempt was made to insert the floating paragraph before the salutation of the letter.
Z	An attempt was made to automatically generate a dollar sign (\$) in a narrative paragraph, but no blank was input after the numerics; or some other erratic data was input for a narrative fill-in.

**Exhibit 2.11.1-18 (01-01-2000)****CTS Commands**

CTS commands shown below are spelled out in their entirety. All of them can be abbreviated to the first three letters. If the command can be abbreviated to one letter, the first letter is shown as underlined.

**Exhibit 2.11.1-18 (Cont. 1) (01-01-2000)****CTS Commands****Command**

@CTS	Calls the CTS processor. Takes you from demand mode to CTS mode.
XCTS	Returns you to demand mode. Exits CTS.
OLD <i>filename</i>	Brings your workfile into "little f," the workspace. Example: <b>OLD CTWF</b> .
REPLACE	Saves a file called with OLD. Remember to REP before exiting. Example: <b>REP CTWF</b> .
New <i>filename</i>	Creates a new workfile.
SAVE	Saves files created with "NEW."
<u>C</u> HANGE/toe/tax/	Changes "toe" to "tax" on the current line. To change every occurrence of toe in the letter, type <b>CHANGE /toe/tax/ ALL</b>
<u>D</u> ELETE <i>n, n</i>	Deletes CTS lines <i>n</i> through <i>n</i> . Example: <b>DELETE 240,310</b> deletes lines 240 through 310
DITTO L <i>i,j</i>	Causes the lines specified in L to be duplicated and placed at <i>i</i> , incremented by <i>j</i> . Example: <b>DITTO 330,360 500,10</b> copies lines 330 through 360, and puts them at line 500 and numbers them by 10s (500, 510, 520, etc.)
GO <i>n</i>	"GO" alone takes you to the top or beginning of your work area. <b>GO 450</b> takes you to line 450. <b>PRINT 450</b> would also take you to line 450, and display the line.
LIST <i>n,n</i>	Prints on the screen the lines specified. Example: <b>LIST 100,300</b> prints lines 100 through 300 on the screen. If you do not specify any lines, your entire file will scroll by.
<u>L</u> OCATE <i>assets</i>	Will find the next occurrence of the word "assets".
<u>L</u> OCATE ' <i>your cooperation</i> '	Single quotes are used to find a string of text which contains a space or spaces. This command would locate the next occurrence of the words "your cooperation."
MOVE L <i>i,j</i>	A destructive DITTO, moves without copying. This causes the lines specified in L to be moved to <i>i</i> , and incremented by <i>j</i> . Example: <b>MOVE 60,110 290,5</b> takes lines 60 through 110 and puts them at line 290 and numbers them 290 295, 300, 305 and so on.
<u>N</u> UMBER <i>n,n</i>	Causes the automatic generation of CTS line numbers. Examples: <b>NUM</b> gives you numbers starting at 100, incremented by 10s. <b>NUM 440,5</b> would generate automatic numbers 440, 445, 450, 455 and so on until you type in the command <b>*MAN</b>
*MANUAL	Terminates automatic numbering mode.
<u>P</u> rint <i>n,n</i>	Prints on the screen the lines specified. Examples: <b>P 400,600</b> prints lines 400 through 600. Another common use is <b>P +20</b> which prints the next 20 lines
<u>P</u> rint <i>n S</i>	Prints the line specified with a Scale, showing the actual columns the text is in. Example: <b>P 520 S</b> displays line 520 with a scale.

**Exhibit 2.11.1-18 (Cont. 2) (01-01-2000)****CTS Commands****Command**

**RESEQUENCE i,j L** Renumbers the CTS edit line numbers specified in L starting with i, incremented by j. Examples: **RES** is the default and rennumbers the whole file starting at 100 by 10s. **RES 700,10 400+** would take all the lines numbered from 400 up, and renumber them by 10s starting with 700. This would allow you to insert several paragraphs before line 400.

**SITE** Allows you to make a paper printout of your workfile. This is a “conversational” command. It will ask you four easy questions.

**HDG?>** Optional. Prints at the top of each page.

**RTN?>** Optional. Prints on the last page. You can respond with your name and where the printout should be routed.

**COPY?>** Optional. You may specify 1 to 63 copies.

**SITE?>** This field is required. For most Service Centers the correct answer is **PR**. If this doesn’t work for you, check with a CSA.

**TAB ; 5, 11** Sets the semicolon as a tab character, and puts tab stops at columns 5 and 11. This could be handy for entering FILL-IN-LINEs, as you may want to enter your NUM-OF-FILL-IN-CD-SECTIONS in column 5, then your FILL-IN-NUM in column 11. Typing a ; would move you out to the next tab stop.

**Exhibit 2.11.1-19 (01-01-2000)****Text Editor Commands**

<b><u>Command</u></b>	<b><u>Action taken by text editor</u></b>
C /xxx/yyy/	changes characters xxx to yyy on current line
CASE UPPER	permits lower case type to be treated as upper case
D	deletes current line
D n,n	delete edit lines n through n
DITTO nnn	copies line nnn and puts copy after current line
DITTO nnn,nnn	copies lines nnn through nnn and puts copies after current line
EXIT	terminates editor saves and applies changes
I[/] (followed by text)	inserts new line of text after current line
IB (followed by text)	inserts new line of text before current line
I+	inserts blank line after current line
L xxx	locates and displays the next line containing characters xxx
LC xxx	locates and displays all lines containing characters xxx
LAST	locates and displays line with highest edit line number
LNP	displays current line with edit line number
LNP n	displays next n lines with their edit line numbers
LNP n,n	displays lines n through n with their edit line numbers
LNP!	displays all lines in letter with their edit line numbers
MOVE nnn,nnn	moves lines nnn through nnn after current line
"n" (edit line number)	displays edit line number n
N	displays next line
OMIT	terminates editor, destroys changes
P	displays current line
P n	displays next n lines
P n,n	display lines n through n
P!	displays all lines in letter
R[/] (followed by text)	overlays current line with text
SCA	displays a scale of numbers across the line
SET	clears tabs
SET nn, nn, nn, etc.	sets tabs at character columns nn, nn, nn, etc.
TAB x	indicates that character x will be used as a tab

**Exhibit 2.11.1-19 (Cont. 1) (01-01-2000)****Text Editor Commands**

<b><u>Command</u></b>	<b><u>Action taken by text editor</u></b>
UP	goes into edit update mode from review mode.
WAIT nn	waits nn seconds before next input
XMIT key (no text)	goes from edit mode to input mode, or input to edit mode



**Exhibit 2.11.1-20 (01-01-2008)****SERP copy (formerly Document 6548)**

1 DOCUMENT 6548 WORKFILE

2 ENTER THE FIELDS TO THE RIGHT OF THE ">". THE PROMPTS ABOVE THE FIELDS

3 ARE TO SHOW FIELD LENGTH AND FORMATS. DO NOT DELETE LINES IN THIS

4 WORKFILE EXCEPT IN NOTE AREA.

5 1234CT 99-99

6 FORM LETTER NUMBER> TRANSMITTAL NUMBER>

7

8 \*\*\*\*\* MM-DD-CCYY

9 ORIGINATING OFFICE> DATE-OF-ISSUE>

10

11 \*\*\*\*\*

12TITLE>

13TITLE>

14 \*\*\*\*\*

15NUMBERS OF COPIES>

16

17 \*\*\*\*\*

18DISTRIBUTION TO>

19

20 9999XX\*\*\*\*\*

21FORMER LETTER>

22

23 \*\*\*\*\*

24IMF/BMF>

25

26 \*\*\*\*\*

27LETTERS CONSIDERED IN REVISION>

28 (continuation) >>>

29

30 \*\*\*\*\*

31NATURE OF CHANGES>

**Exhibit 2.11.1-20 (Cont. 1) (01-01-2008)**  
**SERP copy (formerly Document 6548)**

32 (continuation) >>>

33

34 9999XX\*\*\*\*\*

35 REVISION DATA>

36

37 **NOTE: \*\*\*\*\* THE NEXT SEVEN LINES ARE AN EXAMPLE \*\*\*\*\***

38 BEGIN FIRST LINE OF EACH NOTE - "NOTE: ". STAY WITHIN  
39 THE ASTERISKS.

40]

41 **NOTE:** END EACH NOTE WITH A "]" ON THE NEXT LINE COLUMN 1 EXCEPT  
42 IF IT IS THE LAST NOTE (OR THERE ARE NO NOTES) THEN ENTER  
43 "[ ]" IN COLUMNS 1 & 2. BEGIN THE FIRST NOTE ON LINE #49.

44 [ ]

45

46

47

48 **NOTE: \*\* THIS IS A GUIDE LINE \*\*\* BEGIN NOTES ON NEXT LINE \*\*\*\***

49 [ ]

**Exhibit 2.11.1-21 (01-01-2000)****Example of Notes in WKFILE**

48 **NOTE:**                   **\*\* THIS IS A GUIDE LINE \*\*\* BEGIN NOTES ON NEXT LINE \*\*\*\***

49 **NOTE:**                   In fill-in 07 use IRS Control number.

50 ]

51 **NOTE:**                   In fill-in 08, use "dated" for correspondence or use "of" for telephone calls.

52 ]

53 <b>NOTE:</b>	CASE 1	WHAT TO DO
-----------------	--------	------------

54	file missing	call TCC Letter Technician
----	--------------	----------------------------

55 ]

56 **NOTE:**                   In fill-ins 13, 14, & 15 use "your accountant", "your representative", "your attorney", or individual's name.

57 ]

58[ ]

**Exhibit 2.11.1-22 (01-01-2000)****Screen display terminal responses and error messages from CRX07****END PROGRAM CRX07****PLEASE ENTER FORM-LETTER-NUM (USE LEADING ZEROS) OR ENTER EXIT (E).**

**C-LETTERS MUST BE <9001** — The first 4 characters have a numeric value greater than 9000. This is not allowed for TCC letters.

**FORM-LTR-NUM NOT NUMERIC** — The first 4 characters of the form letter number are not numeric.

**MCC-LETTER-CODE NOT C OR CT** — The last two characters in the MCC letter code must end in either “C” or “CT”.

**RE-ENTER FORM-LETTER-NUM OR ENTER EXIT (E)**

**PLEASE ENTER ACTION CODE (A)DD, (R)ETRIEVE, (D)ELETE OR ENTER EXIT (E)** — Use “A” if this comment record is not already on the master-comment-file. Use “R” if this record already exists on the master-comment-file. Use “D” to delete a record off the master-comment-file. May use upper or lower case letters.

**ACTION CODE MUST BE A, R, OR D** — Entered an invalid action code.

**RE-ENTER ACTION CODE OR ENTER EXIT (E)****RECORD NOT FOUND**

**USE (A) FOR ACTION CODE** — Used an “R” to retrieve a record that is not on the master-comment-file.

**RECORD ALREADY ON DOC-6548**

**USE (R)ETRIEVE FOR ACTION CODE** — Used an “A” for add when a record is already on the master-comment-file.

**RECORD NOT FOUND** — Tried to delete a record not on the master-comment-file.

**DELETE 1234C ??? ENTER Y/N** — This prompt will give the operator a chance to change their mind. Enter (Y)es or (N)o.

**RECORD DELETED: 1234C**

**RECORD WAS ADDED TO WKFILE** — The record was fetched from the master-comment-file and put in WKFILE.

**WKFILE IS FORMATTED** — An “A” was entered as the action code and the program created an empty WKFILE with prompts and literals.

**ERROR: READ ERR# nn** — An MSAM error was encountered while working the master-comment-file. Write the message down and contact national office programmers.

**ALPHA PART OF FORM-LTR-NUM IS INVALID** — The last two digits in the form letter number are not ‘C’ or do not fall into the proper range for a local letter or Service Center letter.

**LOCAL LETTERS MUST BE>9000** — Numeric values for local letter are 9001–9999.

**SERVICE CENTER LETTERS MUST BE <9001**

**Exhibit 2.11.1-23 (01-01-2000)****Screen display messages from CRX08**

**WKFILE CONTAINS ERRORS, SEE ERR-FILE.** — Use CTS/IPF to view ERR-FILE, then switch to WKFILE and make changes.

**1234C WAS ADDED ( OR 1234C WAS REPLACED)** — The record passed the validation requirements and was added, if new, or replaced, if already on the master-comment-file.

**ERROR: WRITE ERR# nn** — An MSAM error was encountered while working with the master-comment-file. Write the error message down and contact National Office programmers.

**END PROGRAM CRX08**

**PLEASE ENTER (A)DD OR (R)EPLACE DOC-6548 REC OR ENTER EXIT (E)** — Use “A” if this is a new record to the master-comment-file, use “R” if replacing an already existing record. May use upper or lower case letters.

**RE-ENTER ACTION CODE OR ENTER EXIT (E)**

**ACTION CODE MUST BE “A” OR “R”** — Entered an invalid action code.

**WKFILE HAS LESS THAN 48 LINES** — No lines are allowed to be deleted in the WKFILE prior to line #49.

**C-LETTERS MUST BE <9001** — First 4 characters of ‘C’ letters must have a numeric value less than 9001.

**FORM-LTR-NUM NOT NUMERIC**

**ALPHA PART OF FORM-LTR-NUM IS INVALID** — The last two digits in the form letter number are not ‘C’ or do not fall into the proper range for a local letter or Service Center letter.

**RECORD ALREADY ON DOC-6548**

**1234C** — Used an “A” for a action code when the record is already on the master-comment-file. “DOC-6548” is an user-name (alias) for the master-comment file.

**RECORD NOT FOUND** — Used a “R” for an action code but the record is not already on the master-comment-file.

**@SYM,U WKFILE.,,PR FOR PRINT OUT** — Move the cursor to the right of the “PR” and transmit. This will give a printed copy of the record.

**LOCAL LETTERS MUST BE <9000** — Numeric values for local letters are 9001–9999.

**SERVICE CENTER LETTERS MUST BE <9001**

**Exhibit 2.11.1-24 (01-01-2000)****Error messages in file ERR-FILE from CRX08**

**FORM LETTER PROMPT LINE INVALID** — The prompt line above the area where form letter number is filled in has been corrupted (moved or written over). This same type message can be given for other fields in WKFILE.

**TRANSMITTAL NUMBER NOT NUMERIC****HYPHEN MISSING IN TRANSMITTAL NUM**

**ILLEGAL MONTH IN DATE OF ISSUE** — Valid month range 1–12

” DAY	” ” ” ”	day	1–31
” YEAR	” ” ” ”	year	60–99
			OR 00–29
CENTURY		century	19 or 20

**DAY NOT NUMERIC IN DATE OF ISSUE**

MONTH	” ”	” ” ” ”
YEAR	” ”	” ” ” ”
CENTURY	” ” ” ”	” ” ” ”

**HYPHEN MISSING IN DATE OF ISSUE**

**ORIGINATION LITERAL INVALID** — The literal for the origination field — (**ORIGINATING OFFICE>**) has been corrupted (either moved or written over). This same type of message can be given for all the fields in WKFILE.

**ORIGINATING OFFICE FILL-IN IS SPACES** — Forgot to enter the required fill-in for ORIGINATING OFFICE. This same type message can be given for all fields in WKFILE except FORMER LETTER and LETTERS CONSIDERED IN REVISION.

**LINE # nnn SHOULD BE SPACES** — There is data on a line that should be blank.

**ERROR MESSAGES FOR THE NOTE AREA**

**ENDING BRACKETS “[ ]” FOUND BEFORE END OF FILE** — The ending brackets must be on the very last line of the WKFILE.

**NOTE AREA> 70 LINES** — A total of 70 lines are allowed for inputting notes.

**FIRST NOTE LINE NOT “NOTE:” OR “[ ]”** — Line #49 is required to have “NOTE:” if there are notes for this record, or, “[ ]” if there are no notes for this record.

**LINE # nnn NOTE CONTINUATION LINE OUT OF PLACE** — On line nnn the first 7 columns are blank and there is text in columns 8–64. This is called a note continuation line. The line itself is valid but it is not inside of a note; probably follows a line with a delimiter “]”.

**LINE # nnn EXTRA BRACKET IN NOTES** — Two lines are together that both begin with a delimiter “[”.

**Exhibit 2.11.1-24 (Cont. 1) (01-01-2000)****Error messages in file ERR-FILE from CRX08**

**LINE # nnn LAST NOTE SHOULD END WITH “[ ]”** — The second to last line has a delimiter “[ ]” and the last line has the ending brackets “[ ]”. Delete the second to last line.

**LINE # nnn BRACKET MISSING BETWEEN NOTES** — Missing “[ ]” between two notes.

**LINE # nnn FIRST CHARACTER NOT “N”, SPACE, “[”, OR “]”** — Column 1 of every note line must contain one of these characters.

**LINE # nnn NOTE TEXT TOO LONG** — Entered data past column 64.

**LINE # nnn NOTE TEXT IS EMPTY** — No data in columns 8 through 64.

**LINE # nnn SHOULD BEGIN “NOTE:”** — Column 1 has “N” but columns 2–7 are invalid.

**LINE # nnn DELIMITER LINE SHOULD BE SPACES** — The first character is “[ ]”, the rest of the line should be spaces.

**LINE # nnn END DELIMITER LINE CONTAINS DATA** — This line has “[ ]” in columns 1 & 2, the rest of the line should be spaces.

**LINE # nnn MISSING CLOSING BRACKET** — Column 1 contains “[” with no closing bracket “]” in column 2.

**LINE # nnn BLANK LINE NOT INSIDE A NOTE** — A blank line was encountered that was between two notes.

**Exhibit 2.11.1-25 (01-01-2000)****Input Format. FILL-IN-LINE.**

**FOR TCC ONLY  
(SERVICE CENTER See Exhibit  
2.11.1-6.)**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
LETTER-LINE-NUM	1	3	Key in all 3 numerics, or allow program CRX51 to number lines for you automatically.
FILL-IN-LINE-IND	4	1	F
FILLER	5	1	Blank
NUM-OF-FILL-IN-CD-SECTIONS	6	1	Numeric
FILLER	7	1	Blank
SELECTIVE-PARA-CD	8	1	Blank or selective paragraph code
FILLER	9	1	Blank
FILL-IN-CD-SECTION			There will be 1 to 5 per line with a space between each
FILL-IN-NUM	10	2	Both numerics must be keyed in
FILL-IN-REQUIRED-IND	12	1	E or M
FILL-IN-START-POS	13	2	Must be 11–80 or spaces
PRINT-JUSTIFICATION-CD	15	1	A, J, L, N, or R



## Exhibit 2.11.1-25 (Cont. 1) (01-01-2000)

Input Format. FILL-IN-LINE.

				FOR TCC ONLY (SERVICE CENTER See Exhibit 2.11.1-6.)
<u>Name</u>		<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
	MAX-FILL-IN- LENGTH	16	3	Must be 001–420
	FILL-IN- VALIDATION-CD	19	1	1, \$, A, S, N, P, T, D, Y, or V
CES-MSG				
	CES-MSG-TYPE	20	1	BLANK, 'a', 'c', 'g' or 'm'
	CES-MSG-NUM	21	2	BLANK or 00–99
FILLER		80	1	Blank

**Exhibit 2.11.1-26 (01-01-2000)**  
**Input Format. NARRATIVE-LINE.**

**FOR TCC USE ONLY**  
**(SERVICE CENTER See Exhibit 2.11.1-8. )**

<u>Name</u>	<u>Start Pos</u>	<u>Length</u>	<u>Remarks</u>
LETTER-LINE-NUM	1	3	Key in all 3 numerics, or allow program CRX51 to number the lines for your automatically.
FILLER	4	1	Blanks
CES-SPECIAL-CHAR	5	1	BLANK, @ or /
FILLER	6	2	Blanks
SELECTIVE-PARA-CD	8	1	Blank or selective paragraph code
FILLER	9	1	Blank
NARRATIVE-TEXT	10	70	Character data — letter text