

Manage Assessments

Overview

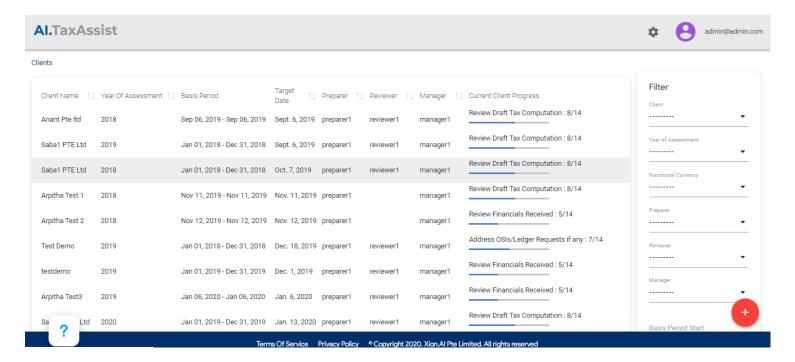
- 1. FirmAdmin dashboard
- 2. Editing and Deleting assessments

① Note: Only a user in the FirmAdmin role has the rights to manage an assessment.

FirmAdmin Dashboard

Let's take a look at the actions that can be performed on the FirmAdmin dashboard screen in order to manage your assessments,

1. The FirmAdmin dashboard lists all the assessments that have been created so far, along with the details that were entered during the assessment creation such as Client Name, Year of assessment, Basis period dates etc.



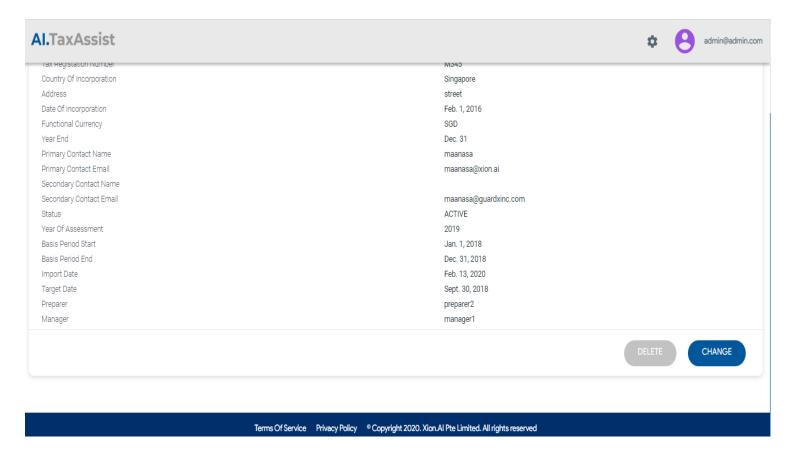
- 2. The dashboard also lists the stage in which the assessment is currently at, under Current Client Progress. To know more about the assessment stages, please read <u>Assessment Stages</u>.
- 3. The assessments can also be filtered on a number of fields such as Client Name, Preparer user, Year of Assessment etc.

Editing and Deleting Assessments

Note: Only a user in the FirmAdmin role has the rights to edit or delete away an assessment.

In order to edit or delete an assessment,

- 1. A user has to login with the FirmAdmin credentials
- 2. Click on the assessment you wish to edit or delete
- 3. To change the details of an assessment, click on the CHANGE button



4. This opens up the form with all the details of the assessment. Once the changes are made, click on SAVE.



- ① Note: Editing any fields in an assessment, after the Assigned stage, resets the assessment back to the Assigned stage.
- 5. In order to delete an assessment, click on the DELETE button



6. This will open up a screen asking if you are sure about deleting the assessment and all the related items (such as documents, OSI entries and responses, Workspace entries etc.). If you are certain, click on YES, I'M SURE button at the bottom of the screen. This will delete away the assessment permanently.

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AI.TaxAssist





Clients > Test Demo > Delete

Are you sure you want to delete the Test Demo and related items?

Clients

Test Demo

Documents

FA (2).xls, eStatement.pdf, MA (2).xls

Osis

OSI object (10)

Workspace Entrys

WorkspaceEntry object (167552), WorkspaceEntry object (167553), WorkspaceEntry object (167553), WorkspaceEntry object (167555), WorkspaceEntry object (167555), WorkspaceEntry object (167557), WorkspaceEntry object (167558), WorkspaceEntry object (167560), WorkspaceEntry object (167560), WorkspaceEntry object (167563), WorkspaceEntry object (167563), WorkspaceEntry object (167563), WorkspaceEntry object (167563), WorkspaceEntry object (167564), WorkspaceEntry object (167565), WorkspaceEntry object (167567), WorkspaceEntry object (167567), WorkspaceEntry object (167576), WorkspaceEntry object (167576)

Fixed Assets

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What's Next?

If you would like to know more about the different stages an assessment passes through, please read <u>Assessment Stages</u>.