



## The Cloud Forms IHT400 Workflow

Work smarter and save time by linking the IHT400 form and schedules

Within the IHT400 Cloud Forms Workflow, all forms and schedules that are related to the IHT400 are linked together. This helps busy probate or private client practitioners to accurately, and easily, complete these complex forms using automated calculations.

This workflow comprises all forms related to a full HM Inheritance Tax account (commonly known as the IHT400 forms). This allows the forms and schedules to be individually selected and linked as one intelligent file, simplifying the production of a full account for HM Revenue and Customs.

### Key features and benefits

- > Add or remove relevant schedules for matters - delivering a fully customisable and more efficient process that fits the requirements of the matter you're working on
- > Use a linked navigation panel to save the time it takes to find all of the forms and schedules for each case
- > Set up templates for common matters to improve practice efficiencies
- > Print all linked forms and schedules in one batch
- > For useful assistance with form completion, you can access up-to-date HMRC guidance using direct links to their website
- > Automatic population of supplemental forms following initial data entry, and accompanying calculations, enables accurate and quick completion of forms
- > Automated calculations of asset values, and complex inheritance tax-due figures, provide greater accuracy and time savings for the system user
- > Locked totals prevent users accidentally overtyping - but they can unlock these fields if required
- > Add as many supplemental schedules as needed
- > Save time when moving between files by electronically accessing all rates and tables, including thresholds for nil rate band amounts from previous years
- > Work on multiple forms and schedules simultaneously

### Product >

Cloud Forms  
IHT400 Workflow

### Sector >

Legal

# Boost the performance of your probate department

- > All the advanced functionality within Cloud Forms is available with this workflow, including emailing in PDF format and appending additional pages
- > Practice details are auto-populated into the forms to eliminate duplication of data entry

## Best Business Practice

The IHT400 Workflow can be used independently alongside your existing forms system or can be integrated with your Cloud Forms catalogue. You'll gain all of the benefits of a full web application, without any software installation required.

The screenshot displays the Cloud Forms IHT400 Workflow interface. The main form is titled 'About the deceased IHT400' and includes the following sections:

- 1. Deceased's name:** Fields for Title (Mr), Surname (Jones), and First names (Steve).
- 2. Date of death (DD MM YYYY):** 04-10-2021
- 3. Inheritance tax reference number:** 1324767
- 4. Was the deceased male or female?:** Male
- 5. Deceased's Date of birth (DD MM YYYY):** 04-06-1960
- 6. Where was the deceased domiciled at the date of death?:** England and Wales

Below this is the 'Deceased's details IHT400' section:

- 8. Was the deceased:** Married or in a civil partnership?
- 9. If the deceased was married or in a civil partnership at the time of their death, on what date did the marriage or registration of the civil partnership take place? (DD MM YYYY):** [Empty field]

The right-hand sidebar contains a navigation menu with the following items:

- Add schedule
- IHT400
- About the deceased
- Deceased's details
- Contact details of the person dealing with the estate
- Deceased's will
- What makes up your Inheritance Tax account - Schedules
- Estate in UK

To learn more about the Cloud Forms IHT400 Workflow, please speak to your Advanced Account Manager or **Contact Us**

## More information

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