

Case Information Statement V2.0
Frequently Asked Questions
(Last updated: January 19, 2010, Easy Soft)

General

1. How to activate the program (internet connection required)?
 - a. Launch the program.
 - b. Click on CIS2.0 icon on the desktop.
 - c. Select "Activate" under the "Help" menu (last button on the top row).
 - d. Enter your 5-digit product ID.
 - e. Download the code.
2. On how many computers can the CIS program be installed?
 - a. Each installation of a CIS program requires a license key. Easy Soft will provide a license key, ("Product ID") which can be utilized on a number of computers for which you purchased the license. For example, if you purchase a 3-computer license, an Easy Soft provided Product ID can be utilized on three computers only.
 - b. Please note, the CIS program is network ready, which means, while the CIS will need to be installed on individual machines, client data files can be stored on a shared network location. Under "Tools" and then "Default Settings" you can set common directory location for your work group. With this setting, all programs will automatically open and save files at this location, providing a very useful file sharing and organizing capability for your team.
3. How to collect initial client data electronically?
 - a. The CIS program includes a separate module, *CIS/lite*, which provides a separate Word format form used to collect initial client data. The data required for preparation of the CIS is well organized in this form so that your client can easily complete this form and return it back to you. Your client must fill in only required data and must not change any other part of the form.
 - b. Once you receive the completed form, you can import the client submitted *CIS/lite* form into a new CIS data file. All data provided by the client will be automatically placed at appropriate places. You can then review provided information, make required edits and complete remaining sections, such as worksheets.
4. How to Enter Unknown or Estimated Values?
 - a. CIS is a long and complicated form containing hundreds of financial values pertaining to parties of the case. Often, many values are not available or known while preparing the CIS form. Instead of leaving those fields blank, you can use the check box provided to the right of the number box. Use of this check box will print "Unknown" for the corresponding value in the forms. As exact amounts become known, you can go back and uncheck the boxes and enter values.
 - b. Additionally, while preparing the Assets and Liabilities worksheets, you have an added option of marking entries as "Estimated." Utilization of this feature will print "est" in the forms indicating that the value is estimated and is subject to change.

Support Worksheet Preparation

1. How to convert amounts to weekly amounts?
 - a. CIS Worksheets require many different types of financial information (such as different types of income) for the party for whom the CIS is being prepared. ALL amounts entered and computed on the CIS Worksheets are weekly amounts.
 - b. Often times, many values are only available as annual or other duration. You can click on the "CALC" button available with virtually all fields in the CIS Worksheets to automatically convert amounts to weekly amounts. If any change is to be made, your previously entered values will be available for you to make edits. You can also enter short notes/details for each field.

2. When can shared parenting worksheet be used?

Both of these conditions must be met for shared parenting worksheet to be used:

 - a. % of overnights with PAR 28% or greater (e.g., two or more overnights (ON) per week) excluding extended vacations. AND
 - b. PPR Household Income Test: ALL PPR income including CS Award must not be below 105% of poverty guidelines (PG).
3. When to use NJ's combined tax table (IX-H) and when is it not applicable?

NJ's combined tax table is a combination of Fed/State/FICA rates, all in one table. IX-H is to be used in most of the cases except if any of the following is applicable to the party:

 - a. Tax status is: Married filing status or HH (IX-H is valid for single or married living apart).
 - b. Mandatory retirement contribution deduction.
 - c. Significant portion of the income is from non-wages (e.g. alimony, social security disability).
 - d. Income exceeds IX-H limit (which is \$3600 per week).
4. If IX-H tax table is not applicable, how are taxes to be computed?

You can use Cir-E tax method. Cir-E tax method will compute Fed, State and Federal taxes separately and apply to line 2a.
5. Why automatic # of withholding computation seems higher than party's W-4 exemptions or year IRS exemptions?
 - a. NJ guidelines require computation of withholdings based on following formula:
 - i. one withholding allowance for the parent; AND
 - ii. one withholding allowance for a current spouse; AND
 - iii. one withholding allowance for each dependent child; AND
 - iv. (a) for incomes less than \$61,000 if unmarried or less than \$90,000 if married, two allowances for each eligible child, subtracting one withholding allowance if there are three or more eligible children; OR
 - v. (b) for incomes between \$61,000 and \$84,000 if unmarried or between \$90,000 and \$119,000 if married, one allowance for each eligible child plus one additional allowance if there are six or more eligible children.
 - b. Purpose of this computation is to match with actual tax payments, thus avoiding factoring in additional tax payments or refunds at year end. IRS allows child tax credits which are not included in IX-H tax tables.
6. Does withholding calculations consider other legal dependant children from other relationships?
 - a. NO. Withholding calculations only consider number of children covered under the guidelines for which support is being sought.
7. Why is support amount adjusted upwards due to child's age and how should it be adjusted?
 - a. NJ child support schedules are based on child-rearing expenditures averaged across the entire age range of zero through 17 years. Initial awards for children in their teens are underestimated by the averaging.
 - b. If at the time of initial order, child is >12yrs, that award and all subsequent orders are to be adjusted higher by 14.6%.
 - c. Initial award entered when child is < 6yrs, no age adjustment to be applied in subsequent orders even if children becomes over 12years.
 - d. Award adjustment is pro-rated based on number of children over 12. For example, if 1child out of 2 is over the age of 12, total adjustment would be 14.6% * ½ of the total award.
 - e. All tax proration are performed by the CIS software automatically and adjusted amount is displayed in the comments section of the worksheet.
8. Does age adjustment to support award (for children over the age of 12) apply to initial orders only or to the modification orders:
 - a. No. Age adjustment is only allowed for initial orders. If you are preparing a modification order, then appropriate adjust number of children over the age 12 to reflect situation at the time of initial order. You can also manually turn-off adjustment calculations by unchecking the box next to "No. of Children Over the Age of 12".
9. What is the purpose of Self-support reserve test?
 - a. To ensure PAR can remain above poverty guidelines after factoring in support obligations.

Case Information Statement Preparation

1. How to use "Endnotes" in CIS?
 - a. You can use Endnote to include illustrations with important values, i.e. show extra information with monthly expense items.
 - b. You can add an endnote for nearly every important value in a Case Information Statement.
 - c. Each endnote is automatically numbered.
 - d. The Endnote icon changes color so you know immediately where you entered notes.
 - e. All endnotes print in a separate document.
 - f. Print a Case Information Statement without endnote references (option to "turn-off" at the end of CIS on Part F).
2. CIS Part C, Last Year's Income – Which Utility to Use?
 - a. If you have the parties' W-2 for the previous year available and they filed separate tax returns, use the "Income/Tax Calc" utility to compute total income and taxes.
 - b. If parties filed joint tax return, use "Tax Allocation" utility. Normally, in case of joint tax filing, it is very difficult to compute individual's share of taxes. This utility is used to allocate taxes paid as a % share of taxable income.
3. How is Debt Service Amount calculated in CIS?
 - a. In the liabilities section of the CIS, check the "Exclude from debt service" box if the item should not be included in the Debt Service in Part D-C.
 - b. Debt service amounts in Part D-C will be automatically computed, if corresponding CALC checkboxes are "ON".
 - c. Based on the preparing party's status (Husband or Wife) specified in Part A, the individual party's and joint debt will be calculated. In the current lifestyle, corresponding party's debt and half of the joint debt is totaled. In the joint lifestyle column, all debt items are totaled because the assumption is that total debt was serviced by the couple's joint income.