



SHORT GUIDE · DOCUMENT TYPE · TAX FORMS

Copying line codes from tax forms by hand?

Every value as a field, with its place on the form.

Returns, schedules, assessments and certificates arrive as PDFs, printouts or scans. This short guide shows how PaperOffice recognizes the documents and reads the values you define, each with its source location. For tax firms, payroll offices and accounting teams.

WHAT YOU TAKE AWAY

AI-DMS recognizes tax assessments, payroll tax certificates and other tax documents. An IDP Agent reads your fields and line codes as a table, and missing required values go to review.

01 · THE PROBLEM

Many lines, many line codes. Each one typed by hand.

Tax documents consist of lines, line codes and schedules. At year-end and in filing season they arrive in bulk: returns, assessments, payroll tax certificates. Copying the values by hand for reconciliation or software is slow and invites typos.

WHY IT HAPPENS

Forms change

Forms are adjusted year after year, lines move and new line codes appear. A template based on fixed positions has to be set up again every year.

Printouts and scans

Many documents arrive on paper or as scans, assessments by mail. Before a value can be read, the document has to be captured first.

Values are spread out

Tax number in the header, amounts in the lines, deadlines in the assessment text. Gathering everything means opening each document several times.

HOW YOU NOTICE IT

- Values from assessments are copied into a spreadsheet by hand.
- At year-end, payroll tax certificates and assessments pile up.
- Finding a line code means leafing through the whole form.
- Whether an assessment contains a back payment or a deadline shows up when you read it.
- Documents for one client or year sit in different folders.

02 · THE WAY WITH PAPEROFFICE

Define once, read every form.

The path is the same for every form type: collect documents, split stacks, detect the type, read fields and line codes, hand over to your tax software. Each step uses a building block that exists in the app.

1

One workspace per client

Each client gets a workspace of their own with their tax data. Documents arrive by upload, scan or smartphone, and text recognition reads scans along the way.

[MODULE: WORKSPACES](#)

2

Split batch scans

If a whole stack sits in one PDF, the Split Agent separates it into individual documents. The original stack is kept.

[MODULE: SPLIT AGENT](#)

3

Detect the type

AI-DMS detects the type, such as tax assessment, payroll tax certificate or tax document, and writes a summary. In our test, it named back payment and payment deadline.

[MODULE: CLASSIFICATION](#)

4

Read fields and line codes

An IDP Agent reads what you describe: tax number, tax office, year and, as a table, each line with code, label and amount. If a required value is missing, a review task follows.

[MODULE: IDP AGENT](#)

5

Hand over

The values go to your tax software as XLSX, CSV or JSON or via the REST API. Filing with the tax office stays with that software.

03 · IN THE APP

From client workspace to form agent.

This is how you set up the path for one form type. You need a workspace with AI-DMS Premium and a typical form as a sample.

1

Create the workspace

Under **Document AI > Workspaces**, create a workspace and choose **Client** as the type on the **General** tab. With the Business workspace type, you enter the tax data under **Details**.

2

Create the agent

Select a form, then **Actions > Agents & workflows > IDP** and **Create new agent**. Describe the fields in plain words and add a table field for the line codes.

3

Test

Start full test run shows value, confidence, page and source location per field. Test with forms from two years and repeat the run up to 10 times.

4

Apply

On the **Data Fields** tab, apply the agent to one form, or via **Actions > Agents & workflows > IDP** to many at once. In the workspace, it can run after every processing.

5

Review and export

In the document list, the **IDP Review** view shows documents with missing fields. Export reviewed values under **Actions > Share & export** as XLSX, CSV or JSON.

TIP FROM PRACTICE

One agent per form type Create a separate agent for each form type, for example for payroll tax certificates and for assessments. Set on the document type, the matching agent runs for every recognized document.

04 · AN EXAMPLE

A payroll office at year-end.



A company with 180 employees. At year-end, the payroll specialist reconciles payroll tax certificates, assessments and forms with payroll. To do that, she types the values from PDF files and printouts into a spreadsheet.

BEFORE

- Printouts and PDF files are spread across several folders.
- She types tax number, year and amounts from every form.
- She learns whether an assessment contains a deadline when she reads it.
- Missing values surface during the final reconciliation.

WITH PAPEROFFICE

- All documents for a year sit in one workspace, scans included.
- AI-DMS recognizes assessment and certificate, and the summary names amount and deadline.
- Her form agent reads tax number, year and every line as a table.
- The 'IDP Review' view shows her missing values before reconciliation.

An example for illustration; the company and person are fictitious. Check with your own forms whether every line code and amount is read correctly.

05 · CHECKLIST

Before filing season begins.

Ten points that get tax documents read, reviewed and handed over before time runs short.

- ☐ You have decided which form type comes first, such as assessments or payroll tax certificates.
- ☐ Fields per form type are defined, with line codes as a table.
- ☐ Required fields are marked, and missing values create a review task.
- ☐ The matching agent is set on the document type and runs automatically.
- ☐ Retention per document type is agreed with your tax advisor.
- ☐ Each client or tax year has its own workspace.
- ☐ The form agent has been tested with forms from at least two years.
- ☐ Someone checks the **IDP Review** view regularly.
- ☐ Batch scans are split with the Split Agent before reading.
- ☐ The route into your tax software is set: export or REST API.

06 · FREQUENTLY ASKED QUESTIONS

What tax firms and payroll offices ask before they start.

Do I need a template for every form year?

You describe the fields in plain words, and the IDP Agent reads by content instead of fixed positions. When a form changes, test the agent with the new form before you keep using it.

Does PaperOffice file with the tax office?

Filing runs through your tax software. PaperOffice reads the values and passes them on as a data record, by export or REST API.

Are assessments read as well?

Yes. AI-DMS recognizes the tax assessment and summarizes it, in our test with back payment and payment deadline. Fixed fields such as tax number, year and assessed tax are read by an IDP Agent you create for that.

Which documents does PaperOffice recognize?

AI-DMS recognizes tax assessment, payroll tax certificate, payslip and tax document, among others. For US forms such as W-2, 1040 and 1099 there are ready-made IDP templates.

How do I spot missing values?

Each field has a rule for a missing value, such as required with review. A review task is then created, and the **IDP Review** view lists all documents with open fields. Review tasks are included in the Professional plan.

How long does PaperOffice keep the documents?

Per document type you set retention years, jurisdiction and legal basis. Which periods apply to you is something to settle with your tax advisor.

07 · HOW TO START

Have your first form read

Create an account at app.paperoffice.ai, set up a workspace, upload a typical form and create your first IDP Agent. Billing is based on usage; prices are on the pricing page.

Pick a form type

Start with the form type your team types up most often.

Define the fields

Write down which values you need from each form and which of them are required.

Process a full year

Once the agent reads reliably, apply it to the documents of a whole year.

DATASHEETS ON THIS TOPIC

IDP Agent

paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf

Classification

paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf

Workspaces

paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf

Split Agent

paperoffice.ai/downloads/paperoffice-ai-datasheet-pdf-split.pdf

AI-OCR

paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf

MORE ON THIS TOPIC

Tax forms

paperoffice.ai/en/solutions/document/ai-tax-form-processing-ocr-automation



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