



FORMS & SCREEN CODES

Dependent Forms

| Form Name | Screen Code |
|---|------------------|
| Dependents - Form 1040 | 2, DEP |
| Form 2120/8332 - Multiple Support Declaration | 2120, 8332, SUPP |
| Form 2441 - Child and Dependent Care Expenses | 2441 |
| Form 8812 - Additional Child Tax Credit and Combat Pay | 8812, CTC |
| Form 8814 - Parent's Election to Report Child's Interest, Dividends | 8814 |
| Form 8839 - Qualified Adoption Expenses | 8839 |

Income Forms

| Form Name | Screen Code |
|--|-----------------------|
| CLGY - Ministerial Income Computations | CLGY, CLER, CLRY |
| First-Time Homebuyer Credit Repayment | HOME |
| Foreign Employer Compensation | FEC |
| Form 1099-B - Capital Gains and Losses | 99B |
| Form 1099-C - Debt Cancellation | 99C |
| Form 1099-DIV - Dividend Income for Schedule B | DIV |
| Form 1099-G - Unemployment Compensation and All Other Government Grants | 99G |
| Form 1099-INT - Interest Income for Schedule B | B, INT, SCH1 |
| Form 1099-MISC - Miscellaneous Income | 99M |
| Form 1099-R - Pensions | 1099, 99R |
| Form 1099-RRB - Railroad Retirement Benefits | RRB |
| Form 1099-SSA - Social Security Benefits | SSA |
| Form 2439 - Notice to Shareholder of Undistributed Long-Term Capital Gains | 2439 |
| Form 2555 - Foreign Earned Income - Part I | 2555, 255B, 25B |
| Form 4137/8919 - Social Security and Medicare Taxes | 4137, 8919, TIP, TIPS |
| Form 4797 - Gains/Losses from Sales of Assets | 4797, SALE |
| Form 4835 - Farm Rental Income | 4835 |
| Form 4852 - Substitute for Form W-2/1099-R | 4852 |
| Form 5329 - Additional Tax on Qualified Plans | 5329 |
| Form 6198 - Computation of Deductible Loss | 6198 |
| Form 6252 - Installment Sales | 6252 |
| Form 6781 - Gains/Losses on Contracts, Straddles | 6781 |
| Form 8582 - Modified Adjusted Gross Income Worksheet for Line 7 | 8582 |
| Form 8615 - Tax for Children with Investment Income Greater Than \$1900 | 8615, KID, KIDS |
| Form 8824 - Like-Kind Exchanges | 8824, LIKE |
| Form 8930 - Disaster Recovery Retirement Plan Distribution | 8930 |
| Form W-2 - Wage and Tax Statement | W2 |
| Form W-2G - Gambling Income | W2G |
| Home - Sale of Primary Home | HOME |
| Income - Form 1040 | 3, INC |
| Modified Adjusted Gross Income Worksheet for Form 8582, Line 7 | 8582 |

| Form Name | Screen Code |
|---|-------------|
| Schedule C - Self-Employed Income | C |
| Schedule D - Capital Gain/Loss Carryovers | D2 |
| Schedule D - Capital Gains and Losses | D, CG |
| Schedule E - Rental Income | E, RENT |
| Schedule E, Part II - Partnerships and Corporations | E2 |
| Schedule E, Part III - Estates and Trusts | E3 |
| Schedule E, Part IV - REMICs | E4 |
| Schedule F - Farm Income | F, FARM |
| Schedule J - Farmer's Income Averaging | J |
| Schedule K-1 for 1041 | K1F |
| Schedule K-1 for 1065 | K1P |
| Schedule K-1 for 1120S | K1S |
| VER - Verification of W-2 | VER |

Deductions Forms

| Form Name | Screen Code |
|--|-------------|
| Auto Expense Worksheet | AUTO |
| Form 1040 - Adjustments | 4, ADJ |
| Form 1098 - Mortgage Interest | 1098 |
| Form 2106 - Employee Business Expenses | 2106 |
| Form 3903 - Moving Expenses | 3903, MOVE |
| Form 4562 - Additional Depreciation Elections | 10 |
| Form 4562 - Depreciation | 4562 |
| Form 4562 - Depreciation Part 1 | 6 |
| Form 4562 - Depreciation Part 4, 5b, 6 | 8 |
| Form 4562 - Depreciation Parts 2 and 3 | 7 |
| Form 4562 - Depreciation Parts 5a and 5c | 9 |
| Form 4684 - Casualties and Thefts | 4684 |
| Form 4952 - Investment Interest Expense Deduction | 4952 |
| Form 8283 - Noncash Charitable Contributions | 8283 |
| Form 8606 - IRA Contributions - Part I | 8606, IRA |
| Form 8606 - IRA Contributions - Part II (ROTH) | ROTH |
| Form 8829 - Office in Home | 8829 |
| Form 8853 - Medical Savings Account (MSA) | 8853, MSA |
| Form 8873 - Extraterritorial Income Exclusion | 8873 |
| Form 8889 - Health Savings Accounts | 8889, HSA |
| Form 8903 - Domestic Production Activities Deduction | 8903, DPAD |
| Schedule A - Itemized Deductions | A |
| Schedule H - Household Employment Taxes | H |
| Schedule SE - Self-Employment Tax | SE |
| SEP/SEHI Self-Employed Health Insurance/Pensions | SEP, SEHI |

| Form Name | Screen Code |
|---|-------------|
| State and Local General Sales Tax Deduction Worksheet | STAX |

Credits Forms

| Form Name | Screen Code |
|--|-----------------------|
| EIC1 - EIC Due Diligence - Qualifying Child | EIC1 |
| EIC4 - EIC Due Diligence - Notes | EIC4 |
| Form 1116 - Foreign Tax Credit | 1116 |
| Form 3468 - Investment Credit | 3468 |
| Form 3800, Part 1 and 2 - Current Year Credits | 3800 |
| Form 3800, Part III - General Business Credit | GBC, OBC, OBTC |
| Form 4136 - Credit for Federal Tax Paid on Fuels | 4136, FUEL |
| Form 4136 - Credit for Federal Tax Paid on Fuels - Part 2 | (no screen code) |
| Form 4255 - Recapture of Investment Credit | 4255 |
| Form 5405 - First-Time Homebuyer Credit | 5405, HBCR |
| Form 5695 - Residential Energy Credits | 5695 |
| Form 5884 - Work Opportunity Credit | 5884 |
| Form 6478 - Credit for Alcohol Used as a Fuel | 6478 |
| Form 6765 - Credit for Increasing Research Activities | 6765 |
| Form 8396 - Mortgage Interest Credit | 8396, MORT |
| Form 8582-CR - Passive Activity Credit Limitations | CR |
| Form 8609 - Low-Income Housing Credit Allocation | 8609 |
| Form 8611 - Recapture of Low-Income Housing Credit | 8611 |
| Form 8801 - Credit for Prior Year AMT | 8801 |
| Form 8820 - Orphan Drug Credit | 8820 |
| Form 8826 - Disabled Access Credit | 8826 |
| Form 8834/8936 - Qualified Electric/Plug-in Vehicle Credit | 8834, 8936, QEV |
| Form 8835 - Renewable Electricity and Refined Coal Production Credit | 8835 |
| Form 8844 - Empowerment Zone Credit | 8844 |
| Form 8845 - Indian Employment Credit | 8845 |
| Form 8846 - Employer SS and Medicare Taxes Paid on Certain Employees | 8846 |
| Form 8859 - DC First-Time Homebuyer Credit | 8859 |
| Form 8862 - Information To Claim Earned Income Credit After Disallowance | 8862 |
| Form 8863/8917 - Education Credits and Deduction | 8863, 8917, EDU, EDUC |
| Form 8864 - Biodiesel Fuels Credit | 8864 |
| Form 8867 - Earned Income Credit Checklist | 8867, EIC, EITC |
| Form 8874 - New Markets Credit | 8874 |
| Form 8880 - Credit for Qualified Retirement Savings Contributions | 8880, SAVE |
| Form 8907 - Nonconventional Source Fuel Credit | 8907 |
| Form 8908 - Energy Efficient Home Credit | 8908 |
| Form 8909 - Energy Efficient Appliance Credit | 8909 |
| Form 8910 - Alternative Motor Vehicle Credit | 8910 |

| Form Name | Screen Code |
|--|--------------|
| Form 8911 - Alternative Fuel Vehicle Refueling Property Credit | 8911 |
| Forms 8881/8882 - Employee Pension Plan/Employee Child Care | 8881, 8882 |
| HBDD - First-Time Homebuyer Credit Due Diligence | HBDD |
| Pay - 1040 - Credits, Other Taxes, Payments | 5, CRED, PAY |
| Schedule M - Making Work Pay and Government Retiree Credits | M |
| Schedule R - Credit for Elderly or the Disabled | R |

Health Care Forms

| Form Name | Screen Code |
|---|----------------------|
| ACA - Affordable Care Act Calculator | ACA |
| Federal Marketplace Lookups for Marketplace Affordability | |
| Form 1095-A Health Insurance Marketplace Statement | 95A |
| Form 8885 - Health Coverage Tax Credit | 8885, HCTC, HIC, LTC |
| Form 8941 - Credit for Small Employer Health Insurance Premiums | SEHI, 8941 |
| Form 8962 - Premium Tax Credit | 8962 |
| Form 8965 - Health Coverage Exemptions | 8965 |
| Health Insurance Coverage Information | HC |
| Long Term Care Premiums | LTC |
| SEHI Self-Employed Health Insurance/ SEP Pensions | SEHI, SEP |

Misc Forms

| Form Name | Screen Code |
|--|-----------------|
| Client Bill - Adjustments and Payments | BILL |
| COMP - Tax Return Comparison | COMP |
| Crop Insurance and Disaster Payments | CIDP |
| Form 1040-ES - Estimated Taxes | ES |
| Form 1040NR - Nonresident Alien Tax Return | NR |
| Form 1040NR - Other Information | NR3 |
| Form 1040NR - Tax on Income Not Effectively Connected with a U.S. Business | NR2 |
| Form 1040X - 2013 Amended Return | X |
| Form 1045 - Application for Tentative Refund | 1045 |
| Form 1045 - Schedule A - Net Operating Loss | NOL |
| Form 1310 - Refund Due a Deceased Taxpayer | 1310, DECD |
| Form 2210 - Penalty for Underpayment of Estimated Tax | 2210, PEN, UET |
| Form 2555 - Foreign Earned Income - Part 1 | 2555 |
| Form 2848 - Power of Attorney | 2848, 8821, POA |
| Form 4506 - Request for Copy or Transcript of Tax Form | 4506 |
| Form 4868/2350 - IRS Extension | 2350, 4868, EXT |
| Form 4970 - Tax on Accumulation Distribution of Trusts | 4970 |
| Form 4972 - Tax on Lump-Sum Distributions | 4972, LUMP |
| Form 56 - Notice Concerning Fiduciary Relationship | 56 |
| Form 6251 - Alternative Minimum Tax | 6251, AMT |

| Form Name | Screen Code |
|--|-----------------|
| Form 8082 - Notice of Inconsistent Treatment | 8082 |
| Form 8275 - Disclosure Statement | 8275 |
| Form 8379 - Injured Spouse Claim and Allocation | 8379, INJ, INSP |
| Form 8379 - Injured Spouse Claim and Allocation - Other Income Detail | |
| Form 8594 - Asset Acquisition Statement | 8594 |
| Form 8815 - Exclusion of Interest from Series EE Bonds | 8815, EE |
| Form 8822 - Change of Address | 8822 |
| Form 8828 - Recapture of Federal Mortgage Subsidy | 8828 |
| Form 8857 - Request for Innocent Spouse Relief | 8857, SPRE |
| Form 8866 - Interest Computation Under the Look-Back Method | 8866, LOOK |
| Form 8914 - Additional Exemption for Housing Displaced Midwest Individuals | 8914 |
| Form 8948 - Preparer Explanation | 8948 |
| Form 9465 - Installment Agreement Request | 9465, DEBT |
| Form 970 - LIFO Application | 970, LIFO |
| Form 982 - Reduction of Tax Attributes Due to Discharge | 982 |
| Form TDF 90-22.1 - Report of Foreign Bank Accounts | 9022 |
| Form W-4 - Personal Allowances Worksheet | W4 |
| Form W-7 - Application for ITIN | W7 |
| Income Changes for Year 2013 to Recalculate Federal Estimates | ETA |
| Late Filing Interest and Penalty | LATE |
| Miscellaneous Return Options | MISC |
| Net Operating Loss Carryforward | LOSS |
| NOTE - Preparer Notes | NOTE |
| Schedule SCH - Explanation Schedule | SCH |
| Worksheet MFS - Income Allocation for Community Property States | 622, MFS |
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Miscellaneous Screen Codes

The following screen codes are not available from any of the tabs in the Review section but are presented in the normal course of preparing a return.

| Form Name | Screen Code |
|--|-----------------|
| Consent to Disclosure of Tax Return | DISC |
| Consent to Use of Tax Return Information | CONS |
| Direct Deposit Information | 8888, DD |
| PIN Information | 8878, 8879, PIN |
| Taxpayer Information | 1, DEMO, NAME |