

Federal

Form/Schedule

Aggregation Steps

Schedule K-1: Partners' Share of
Income, Credits, Deductions, etc.

Alabama

Form/Schedule

Aggregation Steps

Schedule K-1

Schedule PTE-CK-1

Required: must manually enter total fields
Schedule PTE-CK-1 Page 1 Line 14 Column E, F, G and Line 15 column H.

Alaska

Form/Schedule

Aggregation Steps

Schedule B Corp/Partnership
Partners

Schedule B Natural Persons

Arkansas

Form/Schedule

Aggregation Steps

Form AR1050

Schedule AR K-1

California

Form/Schedule

Aggregation Steps

Schedule K-1 (565)

Schedule K-1 (568)

Colorado

Form/Schedule

Aggregation Steps

Form 106, Part III

Connecticut

Form/Schedule

Aggregation Steps

Form CT-1065/CT-1120SI Part III

Form CT-1065/CT-1120SI Part IX

Required: must manually enter total fields
Form CT-1065/CT-1120SI Page 9 Line 11 Column B C and D

Form CT-1065/CT-1120SI Part V

Form CT-1065/CT-1120SI Part VI

Form CT-1065/CT-1120SI Part VII

Schedule CT K-1

Schedule CT-AB Section 3

Required: must manually enter total fields
Schedule CT-AB Page 2:ome 7 Column C, D, E, F, G, H and I

Delaware

Form/Schedule

Aggregation Steps

Schedule K-1

Georgia

Form/Schedule

Aggregation Steps

Form 700, Schedule 5

Idaho

Form/Schedule

Aggregation Steps

Form PTE-12

Required: must manually enter total fields
Form PTE-12 Column (D) Total

Schedule K-1

Illinois

Form/Schedule

Aggregation Steps

Schedule B, Section B

Indiana

Form/Schedule

Aggregation Steps

Schedule Composite

Required: must manually enter total fields
Schedule Composite | Composite Partner Detail | Line 13 Column D, E and F

Schedule Composite-COR

Required: must manually enter total fields
Schedule Composite-COR | Composite Partner Detail | Subtotal and Total Composite COR Tax

Schedule IN K-1

Iowa

Form/Schedule

Aggregation Steps

Schedule K-1

Kansas

Form/Schedule

Aggregation Steps

Form K-120S, Part II

Kentucky

Form/Schedule

Aggregation Steps

Schedule K-1

Louisiana

Form/Schedule

Aggregation Steps

565 Schedule A, B, and C

Required: must manually enter total fields
565 Page 2 Schedule C Totals for all columns

565 Schedule D

Composite Included Partners

Composite Not Included
Partners

Maine

Form/Schedule

Aggregation Steps

Schedule 2P K-1

Schedule 3P K-1

Maryland

Form/Schedule

Aggregation Steps

Schedule B Corporations

Required: must manually enter total fields
Schedule B Part IV Distributive Tax Paid Total and Distributive Tax Credit Total

Schedule B Fiduciary

Required: must manually enter total fields
Schedule B Part II Distributive Tax Paid Total and Distributive Tax Credit Total

Schedule B Individuals

Required: must manually enter total fields
Schedule B Part I Distributive Tax Paid Total and Distributive Tax Credit Total

Schedule B PTEs Corporations

Required: must manually enter total fields
Schedule B Part III Distributive Tax Paid Total and Distributive Tax Credit Total

Massachusetts

Form/Schedule

Aggregation Steps

Form 3, Schedule 3K-1

Form MA NRCR, Schedule 3K-1

Minnesota

Form/Schedule

Aggregation Steps

Schedule KPC

Schedule KPCNC

Schedule KPI

Schedule KPINC

Mississippi

Form/Schedule

Aggregation Steps

Form 84-131, Schedule K

Required: must manually enter total fields
 Form 84-131 Schedule K Line 2 Column B, Column C2a and 2c, Column D and Line 5.

Form 84-132P, Schedule K-1

Missouri

Form/Schedule

Aggregation Steps

Form MO-1065, Part II

Required: must manually enter total fields
 Form MO-1065 Part II Column 5 Total

Form MO-NRP

Montana

Form/Schedule

Aggregation Steps

Form PR-1, Schedule IV

Required: must manually enter total fields
 Form PR-1 Schedule IV Column H Total

Schedule K-1

New Jersey

Form/Schedule

Aggregation Steps

Form NJ K-1

Form NJ-1065 Partners Directory

Required: must manually enter total fields
 Form NJ-1065 Partners Directory Total tax Column J and K

New York

Form/Schedule

Aggregation Steps

Schedule K-1

North Carolina

Form/Schedule

Aggregation Steps

Form D-403, Part 4

Required: must manually enter total fields
 Form D-403 Page 2 Part 4 Partner Total Line 4 to 20

North Dakota

Form/Schedule

Aggregation Steps

Schedule K-1

Schedule KP

Ohio

Form/Schedule

Aggregation Steps

Form 4708, Schedule K-1

Form IT 1140, Schedule K-1

Oklahoma

Form/Schedule

Aggregation Steps

Form 514, Part 5

Form 514-PT

Required: must manually enter total fields
Form 514-PT Line J and K

Oregon

Form/Schedule

Aggregation Steps

Form OC, Schedule OR-OC-1

Required: must manually enter total fields
Schedule OR-OC-1 Line 5 Column A, C and D

Form OC, Schedule OR-OC-2

Required: must manually enter total fields
Schedule OR-OC-2 Line 6 Column A, B and C

Schedule OR-K-1

Pennsylvania

Form/Schedule

Aggregation Steps

Form PA-65 Corp Directory

Required: must manually enter total fields
Form PA-65 Corp Line 2, 3, 4, and 5

Form PA-65 Member Directory

Schedule NRK-1

Schedule RK-1

Rhode Island

Form/Schedule

Aggregation Steps

RI-1065 Schedule K-1

RI-1120S Schedule K-1

South Carolina

Form/Schedule

Aggregation Steps

Form SC-1065, Schedule K-1

Utah

Form/Schedule

Aggregation Steps

Form TC-65, Schedule K-1

Form TC-65, Schedule N

Required: must manually enter total fields
Schedule N Total Utah Withholding tax to be paid by this partnership

Vermont

Form/Schedule

Aggregation Steps

Schedule K-1VT

Virginia

Form/Schedule

Aggregation Steps

Form 502, Schedule VK-1

West Virginia

Form/Schedule

Aggregation Steps

Form WV/NRW-2

Schedule K-1

Schedule K-1C

Schedule SP

Wisconsin

Form/Schedule

Aggregation Steps

Form 1CNP, Schedule 2

Form PW-1, Part 2

Schedule 3K-1