

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
FinCEN Form 114: Report of Foreign Bank and Financial Accounts	✓	1 max for taxpayer. 1 max for spouse filing separately.
FinCEN Form 114a: Record of Authorization to Electronically File FBARS		Print only.
Form 1040: U.S. Individual Income Tax Return	✓	1 max per return
Form 1040-ES (NR): U.S. Estimated Tax for Nonresident Alien Individuals		
Form 1040-ES: Estimated Tax for Individuals		
Form 1040NR: U.S. Nonresident Alien Income Tax Return	✓	1 max per return
Form 1040V: Payment Voucher		
Form 1040X: Amended U.S. Individual Income Tax Return		Cannot be e-filed
Form 1042-S: Foreign Person's US Source Income Subject to Withholding	✓	Unlimited number per return
Form 1045: Application for Tentative Refund		
Form 1098-C: Contributions of Motor Vehicles, Boats, and Airplanes	✓	10 max per return
Form 1098-MISC: Miscellaneous Income		
Form 1098-T: Tuition Statement		
Form 1099-G: Certain Government Payments		
Form 1099-K: Payment Card and Third Party Network Transactions		
Form 1099-NEC: Non-Employee Compensation		
Form 1099-Q: Payments for Qualified Education Programs		Not e-filed
Form 1099-QA: Distributions from ABLE Accounts		Not e-filed
Form 1099-R: Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.	✓	20 max per return
Form 1099-SA: Distributions from and HAS, Archer HAS or Medicare Advantage MSA		
Form 1116 (AMT): Recomputed Computation of Foreign Tax Credit for AMT	✓	Unlimited number per return

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 1116: Foreign Tax Credit	✓	Unlimited number per return
Form 1310: Statement of Person Claiming Refund Due a Deceased Taxpayer	✓	1 max per taxpayer
Form 14039: Identity Theft Affidavit		Does not e-file
Form 2106: Employee Business Expenses	✓	2 max per taxpayer
Form 2210: Underpayment of Estimated Tax by Individuals, Estates, and Trusts	✓	1 max per return
Form 2210-F: Underpayment of Estimated Tax by Farmers and Fishermen	✓	1 max per return
Form 2350: Application for Extension of Time to File U.S. Income Tax Return (For U.S. Citizens and Resident Aliens Abroad)	✓	1 max per return
Form 2439: Notice to Shareholder of Undistributed Long-Term Capital Gains	✓	1 max per return
Form 2441: Child and Dependent Care Expenses	✓	1 max per return
Form 2555: Foreign Earned Income	✓	1 max per taxpayer
Form 2848: Power of Attorney and Declaration of Representative		
Form 3115: Application for Change in Accounting Method	✓	Unlimited number per return
Form 3468: Investment Credit	✓	1 max per return
Form 3520: Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts		
Form 3520-A: Annual Information Return of Foreign Trusts with a U.S Owner		
Form 3800: General Business Credit	✓	Max per return: Page 1: 1; Page 2: 1; Page 3: Unlimited
Form 3903: Moving Expenses	✓	2 max per return
Form 4136: Credit for Federal Tax Paid on Fuels	✓	1 max per return
Form 4137: Social Security and Medicare Tax on Unreported Tip Income	✓	2 Max per return
Form 4255: Recapture of Investment Credit	✓	Unlimited number per return

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 4562: Depreciation and Amortization	✓	Unlimited number per return
Form 4563: Exclusion of Income for Bona Fide Residents of American Samoa	✓	1 per return.
Form 461: Limitation on Business Losses	✓	1 max per return
Form 4684: Casualties and Thefts	✓	Unlimited number per return
Form 4797 (AMT): Recomputed Sales of Business Property for AMT		
Form 4797: Sales of Business Property	✓	1 max per return
Form 4835: Farm Rental Income and Expenses	✓	4 max per return
Form 4868: Application for Automatic Extension of Time to File U.S. Individual Income Tax Return	✓	1 max per return
Form 4952 (AMT): Recomputed Investment Interest Expense Deduction for AMT		
Form 4952: Investment Interest Expense Deduction	✓	1 max per return
Form 4970: Tax on Accumulation Distribution of Trusts	✓	1 max per return
Form 4972: Tax on Lump-Sum Distributions	✓	1 max per taxpayer and 1 max for spouse
Form 5074: Allocation of Individual Income Tax to Guam or the Commonwealth of the Northern Mariana Islands (CNMI)	✓	1 max per return
Form 5329: Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts	✓	1 max per taxpayer and 1 max per spouse
Form 5405: Repayment of the First-Time Homebuyer Credit	✓	1 max per return
Form 5471: Information Return of U.S. Persons with Respect to Certain Foreign Corporations	✓	Unlimited number per return
Form 5695: Residential Energy Credits	✓	2 max per return
Form 5884: Work Opportunity Credit	✓	1 max per return
Form 6198 (AMT): Recomputed At-Risk Limitations for AMT		
Form 6198: At-Risk Limitations	✓	Unlimited number per return
Form 6251: Alternative Minimum Tax - Individuals	✓	1 max per return
Form 6252 (AMT): Recomputed Installment Sale Income for AMT		

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 6252: Installment Sale Income	✓	Unlimited number per return
Form 6765: Credit for Increasing Research Activities	✓	1 max per return
Form 6781: Gains and Losses from Section 1256 Contracts and Straddles		
Form 7202: Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals		
Form 8082: Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)	✓	Unlimited number per return
Form 8275: Disclosure Statement	✓	2 max per return
Form 8275-R: Regulation Disclosure Statement	✓	2 max per return
Form 8283: Noncash Charitable Contributions	✓	Unlimited number per return
Form 8288-A: Statement of Withholding on Disposition by Foreign Persons of US Real Property Interests	✓	Unlimited number per return
Form 8379: Injured Spouse Allocation	✓	1 max per return
Form 8396: Mortgage Interest Credit	✓	1 max per return
Form 8453: U.S. Individual Income Tax Transmittal for an IRS E-file Return		
Form 8582 (AMT): Recomputed Passive Activity Loss Limitation for AMT		
Form 8582: Passive Activity Loss Limitation	✓	1 max per return
Form 8582-CR: Passive Activity Credit Limitation	✓	1 max per return
Form 8586: Low-Income Housing Credit	✓	1 max per return
Form 8594: Asset Acquisition Statement	✓	Unlimited number per return
Form 8606: Nondeductible IRAs	✓	1 max per taxpayer
Form 8611: Recapture of Low Income Housing Credit	✓	5 max per return
Form 8615: Tax for Certain Children Who Have Unearned Income	✓	1 max per return
Form 8621: Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund	✓	Unlimited number per return
Form 8689: Allocation of Individual Income Tax to the U.S. Virgin Islands	✓	1 max per return

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 8697: Interest Computation Under the Look-Back Method for Completed Long-Term Contracts	✓	4 max per return
Form 8801: Credit for Prior Year Minimum Tax - Individuals, Estates, and Trusts	✓	1 max per return
Form 8805: Foreign Partners Information Statement of Section 1446 Withholding Tax	✓	Unlimited number per return
Form 8814: Parents' Election to Report Child's Interest and Dividends	✓	10 max per return
Form 8815: Exclusion of Interest from Series EE and I U.S. Savings Bonds Issued After 1989	✓	1 max per return
Form 8822: Change of Address		
Form 8824 (AMT): Recomputed Like-Kind Exchanges for AMT		
Form 8824: Like-Kind Exchanges	✓	Unlimited number per return
Form 8826: Disabled Access Credit	✓	1 max per return
Form 8829: Expenses for Business Use of Your Home	✓	4 Forms 8829 for each Schedule C; total: 32
Form 8833: Treaty-Based Return Position Disclosure	✓	Unlimited number per return
Form 8835: Renewable Electricity, Refined Coal, and Indian Coal Production Credit	✓	1 max per return
Form 8838-P: Consent to Extend the Time To Assess Tax Pursuant to the Gain Deferral Method (Section 721(c))	✓	
Form 8839: Qualified Adoption Expenses	✓	1 max per return
Form 8840: Closer Connection Exception Statement for Aliens	✓	1 max per return
Form 8843: Statement for Exempt Individuals and Individuals with a Medical Condition	✓	1 max per return
Form 8846: Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips		
Form 8853: Archer MSAs and Long-Term Care Insurance Contracts	✓	1 max per return
Form 8854: Initial and Annual Expatriation Statement	✓	2 max per return
Form 8858: Information Return of US Persons with Respect to Foreign Disregarded Entities	✓	Unlimited number per return
Form 8859: Carryforward of the District of Columbia First-Time Homebuyer Credit	✓	1 max per return
Form 8863: Education Credits	✓	Max per return: Page 1: 1; Page 2: Unlimited

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 8865: Return of U. S. Persons with Respect to Certain Foreign Partnerships	✓	Unlimited number per return
Form 8867: Paid Preparer's Earned Income Credit Checklist	✓	4 max per return
Form 8878: IRS E-file Signature Authorization for Extensions (printed only for e-file)		
Form 8879: IRS E-file Signature Authorization (printed only for e-file)		
Form 8880: Credit for Qualified Retirement Savings Contributions	✓	1 max per return
Form 8881: Credit for Small Employer Pension Plan Startup Costs	✓	1 max per return
Form 8882: Credit for Employer-Provided Child Care Facilities and Services	✓	1 max per return
Form 8885: Health Coverage Tax Credit	✓	2 max per return
Form 8886: Reportable Transaction Disclosure Statement	✓	Unlimited number per return
Form 8888: Allocation of Refund	✓	1 max per return
Form 8889: Health Savings Account	✓	2 max per return
Form 8903 - Domestic Production Activities Deduction		1 Max per return
Form 8903 - Domestic Production Activities Deduction		1 max per return
Form 8903 - Domestic Production Activities Deduction		This form has been affected by the Tax Cuts & Jobs Act (TCJA). The deduction has been repealed for Tax Year 2018. The IRS has retained this form for print and e-file. We are awaiting instructions from the IRS on whether this form will be e-filed.
Form 8906: Distilled Spirits Credit	✓	1 max per return
Form 8908: Energy Efficient Home Credit	✓	1 max per return
Form 8910: Alternative Motor Vehicle Credit	✓	1 max per return
Form 8911: Alternative Fuel Vehicle Refueling Property Credit	✓	1 max per return
Form 8912: Credit to Holders of Tax Credit Bonds	✓	Max per return: Page 1: 1; Page 2: 1; Page 3: 99
Form 8915-C: Qualified Disaster Retirement Distributions and Repayments		

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 8915-D: Qualified Disaster Retirement Distributions and Repayments		
Form 8915-E: Qualified Disaster Retirement Distributions and Repayments		
Form 8917: Tuition and Fees Deduction		
Form 8919: Uncollected Social Security and Medicare Taxes on Wages	✓	2 max per return
Form 8932: Credit for Employer Differential Wage Payments	✓	1 max per return
Form 8936: Qualified Plug-In Electric Drive Motor Vehicle Credit	✓	1 max per return
Form 8938: Statement of Specified Foreign Financial Assets	✓	1 max per return
Form 8941: Credit for Small Employer Health Insurance Premiums	✓	2 max per return
Form 8948: Preparer Explanation for Not Filing Electronically		
Form 8949 (AMT): Sale and Other Dispositions of Capital Assets for AMT		
Form 8949: Sale and Other Dispositions of Capital Assets	✓	Unlimited number per return
Form 8958: Allocation of Tax Amounts Between Certain Individuals in Community Property States	✓	1 max per return
Form 8959: Additional Medicare Tax	✓	1 max per return
Form 8960: Net Investment Income Tax -- Individual, Estates, and Trusts	✓	1 max per return
Form 8962: Premium Tax Credit	✓	1 max per return
Form 8990: Limitation on Business Interest Expense Under Section 163(j)	✓	Unlimited number per return
Form 8992: US Shareholder Calculation of Global Intangible Low-Taxed Income (GILTI)	✓	2 max per return
Form 8993: Section 250 Deduction for Foreign-Derived Intangible Income (FDII) and Global Intangible Low-Taxed Income (GILTI)	✓	
Form 8994: Employer Credit for Paid Family and Medical Leave	✓	1 max per return
Form 8995: Qualified Business Income Deduction Simplified Computation	✓	1 max per return
Form 8995-A including Schedules A-D: Qualified Business Income Deduction	✓	1 max per return
Form 9325: Acknowledgment and General Information for Taxpayers Who File Electronically		

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 9465: Installment Agreement Request	✓	1 max per return
Form 965 including Schedule F and H: Inclusion of Deferred Foreign Income Upon Transition to Participation Exemption System	✓	1 max per return. 3 max per return for Schedules F and H. Statement for Schedule H, line 11 must be filed via PDF
Form 965-A: Individual Report of New 965 Tax Liability	✓	1 max per return.
Form 970: Application to Use LIFO Inventory Method	✓	Unlimited number per return
Form 982: Reduction of Tax Attributes Due to Discharge of Indebtedness	✓	1 max per return
Form RRB-1099: Railroad Retirement Benefits		
Form SSA-1042S: Social Security Benefit Statement		
Form T: Forest Activities Schedule	✓	Unlimited number per return
Form W-2: Wage and Tax Statement (printed only for e-filed return)	✓	50 max per return
Form W2-G: Certain Gambling Winnings (printed only for e-filed return)	✓	Unlimited number per return
Form W-7 (COA): Certificate of Accuracy for IRS Individual Taxpayer Identification Number		Cannot be e-filed
Form W-7: Application for IRS Individual Taxpayer Identification Number		Cannot be e-filed
Schedule 1 - Additional Income and Adjustments to Income		1 max per return
Schedule 2 - Additional Taxes		1 Max per return
Schedule 3 - Additional Credits and Payments		1 max per return
Schedule 6 - Foreign Address and Third Party Designee		1 max per return
Schedule 8812: Child Tax Credit	✓	1 max per return
Schedule A: Itemized Deductions	✓	1 max per return
Schedule B: Interest and Dividend Income	✓	1 max per return
Schedule C: Profit or Loss From Business	✓	8 maximum of Schedules C/C-EZ
Schedule D (AMT): Recomputed Capital Gains and Losses for AMT		

2020 1040 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Schedule D: Capital Gains and Losses	✓	1 max per return
Schedule D: Carryover Worksheet		
Schedule E: Supplemental Income and Loss	✓	Unlimited number of rental properties per return
Schedule EIC: Earned Income Credit	✓	1 max per return
Schedule F: Profit or Loss From Farming	✓	Unlimited number per return
Schedule H: Household Employment Taxes	✓	1 max per taxpayer
Schedule J: Income Averaging for Farmers and Fishermen	✓	1 max per return
Schedule LEP: Request for Change in Language Preference		
Schedule R: Credit for the Elderly or the Disabled	✓	1 max per return
Schedule SE: Self-Employment Tax	✓	1 max per taxpayer
Section 199A (QBI) Unadjusted Basis for 2.5% Limitation		