

# 2020 1040 FormSource Query

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Form

Federal

Year

All Years

Description

Preparer Listing for all clients

# 2020 1040 FormSource Query

Form

West Virginia

Year

2020

Description

West Virginia Returns that include Social Security Benefits and Senior Citizen or Disability Deduction

There are two form source queries – Taxpayer and Spouse

Each query is checking for amounts on WV Schedule M, line 33 and 45, for either taxpayer or spouse columns.

Year: 2020 Return Type: 1040 \*User: HHO ☐ FormSource Library

Sort by: Query Name \* Blank User to display all Firm queries.

Query	Owner	Date Created	Date Modified	Status
WV Senior Citizen or Disability Deduction Spouse	HHO	04/05/2021 10:31AM	N/A	
WV Senior Citizen or Disability Deduction Taxpayer	HHO	04/05/2021 10:34AM	N/A	

Selection Criteria: 

DEL UP DOWN ( ) AND OR

Product	Form	Form Name	Field Name	Cond.	Value	AND/OR
(						
1040	T	WV SCH M	SP SCDD LN C	<>	0	AND
)						
(						
1040	T	WV SCH M	SP SS TOTAL	<>	0	

Selection Criteria: 

DEL UP DOWN ( ) AND OR

Product	Form	Form Name	Field Name	Cond.	Value	AND/OR
(						
1040	T	WV SCH M	TP SS TOTAL	<>	0	AND
)						
(						
1040	T	WV SCH M	TP SCDD LN C	<>	0	

# 2020 1040 FormSource Query

## Form

Form 1040

## Year

2020

## Description

Federal Returns that may qualify for early payment of CTC

Query for Unemployment Received if Not a Dual Status Return

Product	Form	Form Name	Field Name	Cond.	Value	AND/OR
1040	W	FORM 1040	NUMBER OF QUALIFYING CHILDREN	>=	1	OR
1040	W	FORM 1040	NUMBQCH	>=	1	

Suggested fields for Report:

1040	W	FORM 1040	NUMBER OF QUALIFYING CHILDREN
1040	W	FORM 1040	NUMBQCH
1040	W	FORM 1040	ADD LINES 2 AND 3
1040	T	FORM 1040	AGI
1040	T	FORM 1040NR	ADJ GROSS INCOME PAGE 1
1040	T	DUAL STATUS TAXPAYER	NR ADJUSTED GROSS INCOME
1040	T	DUAL STATUS TAXPAYER	ADJUSTED GROSS INCOME

Additional information for the Fields in the Report:

If your return uses the Publication 972 worksheet:

- Number of Qualifying Children – This is the number of qualifying children for Child Tax Credit on Publication 972 Worksheet
- Add Lines 2 and 3 – This is the Modified AGI used in the Publication 972 [Worksheet](#)

If your return uses the Child Tax Credit worksheet (instead of Publication 972)

- NUMBQCH – This is the number of qualifying children for Child Tax Credit on Worksheet
- AGI Values
  - The remaining four AGI values are AGI for various return types (Resident Return, [Non Resident](#) Return, Dual Status [Non Resident](#), and Dual Status Resident)

# 2020 1040 FormSource Query

## Form

Form 1040

## Year

2020

## Description

Federal Returns that should qualify for 3rd Stimulus Payment

Query for Stimulus Check Eligibility when Filing Status is HOH

Product	Form	Form Name	Field Name	Cond.	Value	AND/C
1040	T	FORM 1040	HOH STATUS	=	X	AND
1040	T	FORM 1040	TAXPAYER CLAIMED AS DEP	<>	X	AND
1040	T	FORM 1040	AGI	<	120000	

Query for Stimulus Check Eligibility when Filing Status is MFJ or Qualifying Widower

Product	Form	Form Name	Field Name	Cond.	Value	AND/C
1040	T	FORM 1040	TAXPAYER CLAIMED AS DEP	<>	X	AND
1040	T	FORM 1040	AGI	<	160000	AND
(						
1040	T	FORM 1040	MFJ STATUS	=	X	OR

1040	T	FORM 1040	WIDOWER STATUS	=	X	
)						

Query for Stimulus Check eligibility when filing status is Single or MFS

Product	Form	Form Name	Field Name	Cond.	Value	AND/C
1040	T	FORM 1040	AGI	<	80000	AND
1040	T	FORM 1040	TAXPAYER CLAIMED AS DEP	<>	X	
(						
1040	T	FORM 1040	SING STATUS	=	X	

1040	T	FORM 1040	MFS STATUS	=	X	
)						

# 2020 1040 FormSource Query

## Form

Form 1040

## Year

2020

## Description

Federal Returns with Unemployment

### Query for Unemployment Received if Not a Dual Status Return

Product	Form	Form Name	Field Name	Cond.	Value	AND/C
1040	T	FORM 1040	UNEMPLOYMENT	<>		AND
(						
1040	T	FORM 1040	AGI	<=	150000	OR
1040	T	FORM 1040NR	ADJ GROSS INCOME PAGE 1	<=	150000	

### Query for Unemployment Received if Dual Status Return

1040	T	DUAL STATUS TAXPAYER	UNEMPLOYMENT COMPENSATION	<>		AND
(						
1040	T	DUAL STATUS TAXPAYER	ADJUSTED GROSS INCOME	<=	150000	OR
1040	T	DUAL STATUS TAXPAYER	NR ADJUSTED GROSS INCOME	<=	150000	

# 2020 1040 FormSource Query

Form

Arkansas

Year

2020

Description

Arkansas Unemployment 2020 Tax Year

Saved Queries

Define Query

Define Report

Select Accounts

Run Query

Define the selection criteria for your query.

Form Type: State Tax Form

Paste

Field Search

Form: AR AR1000NR PG2

Condition:

Field: SP UNEMPLOYMENT

Value:

ADD

Field Description

☒ Include Field in Report

Selection Criteria: 

DEL

UP

DOWN

(

)

AND

OR

Product	Form	Form Name	Field Name	Cond.	Value	AND/c
1040	T	AR AR1000 PG2	UNEMPLOYMENT SPOUSE	> <div></div>	0	OR <div></div>
1040	T	AR AR1000 PG2	UNEMPLOYMENT TAXPAYER	> <div></div>	0	OR <div></div>
1040	T	AR AR1000NR PG2	TP UNEMPLOYMENT	> <div></div>	0	OR <div></div>
1040	T	AR AR1000NR PG2	SP UNEMPLOYMENT	> <div></div>	0	

<

>

# 2020 1040 FormSource Query

## Form

Form 2210

## Year

2020

## Description

1040 Form 2210 Missing 2019 Overpayment Applied to Estimated Tax Amount

### Form 2210 Missing 2019 Overpayment Applied to Estimated Tax Amount

FormSource

Saved Queries

Define Query

Define Report

Select Accounts

Run Query

Define the selection criteria for your query.

Form Type: State Organizer

Paste

Field Search

Form: MO PAYMENTS/CREDITS

Condition:

Field: AMOUNT OVERPAY APPLY TO EST

Value:

ADD

Field Description

☒ Include Field in Report

Selection Criteria: 

DEL

UP

DOWN

(

)

AND

OR

Product	Form	Form Name	Field Name	Cond.	Value	AND/OR
1040	O	MO PAYMENTS/CREDITS	AMOUNT OVERPAY APPLY TO EST	<>		

# 2020 1040 FormSource Query

Form

Form 1040

Year

All Years

Description

1040 Taxpayers Indicating Virtual Currency

Define the selection criteria for your query.

Form Type: Federal Tax Form

Paste

Field Search

Form: FORM 1040

Condition:

Field: VIRTUAL CURRENCY YES

Value:

ADD

Field Description

☒ Include Field in Report

Selection Criteria: 

DEL

UP

DOWN

(

)

AND

OR

Product	Form	Form Name	Field Name	Cond.	Value	AND/O
1040	T	FORM 1040	VIRTUAL CURRENCY YES	=	X	



# 2020 1040 FormSource Query

Form  
Form 8990  
Year  
All Years

Description  
1040 Form 8990 Limited Business Interest Expense Query

FormSource

Saved Queries

Define Query

Define Report

Select Accounts

Run Query

Define the selection criteria for your query.

Form Type: Federal Tax Form

Paste

Field Search

Form: FORM 8990

Condition:

Field: AMT DISALLW BIE

Value:

ADD

Field Description

☒ Include Field in Report

Selection Criteria:

DEL

UP

DOWN

(

)

AND

OR

Product	Form	Form Name	Field Name	Cond.	Value	AND/OR
1040	T	FORM 8990	TOT BIE	<>	0	OR
1040	T	FORM 8990	AMT TOT BIE	<>	0	OR
1040	T	FORM 8990	DISALLW BIE	<>	0	OR
1040	T	FORM 8990	TOT CY BIE DED	<>	0	OR
1040	T	FORM 8990	AMT TOT CY BIE DED	<>	0	OR
1040	T	FORM 8990	AMT DISALLW BIE	<>	0	

# 2020 1040 FormSource Query

Form

Form 461

Year

All Years

Description

1040 Form 461 Limited Business Loss Query

## FormSource

Saved Queries

Define Query

Define Report

Select Accounts

Run Query

Define the selection criteria for your query.

Form Type: Federal Tax Form

Paste

Field Search

Form: F461

Condition: < Less Than

Field: LBL - NEG AMOUNT ADDED BACK

Value: 0

ADD

Field Description

☒ Include Field in Report

Selection Criteria: 

DEL

UP

DOWN

(

)

AND

OR

Product	Form	Form Name	Field Name	Cond.	Value	AND/OR
1040	T	F461	LBL - NEG AMOUNT ADDED BACK	<	0	