Form

Federal

Year

All Years

Description

Preparer Listing for all clients

11/1/2021 Page 1 of 10

Form

West Virginia

Year

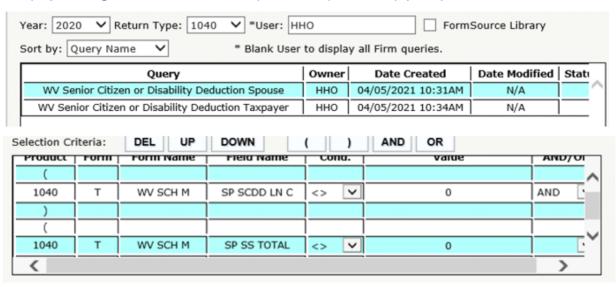
2020

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.



Product	FORM	Form Name	Field Name	Cona.	value	AND/O
(
1040	Т	WV SCH M	TP SS TOTAL	<> V	0	AND [
)						
(
1040	Т	WV SCH M	TP SCDD LN C	<> V	0	Γ,

11/1/2021 Page 2 of 10

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/C
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	Т	FORM 1040	AGI	
1040	Т	FORM 1040NR	ADJ GROSS INCOME PAGE 1	
1040	Т	DUAL STATUS TAXPAYER	NR ADJUSTED GROSS INCOME	V
1040	Т	DUAL STATUS TAXPAYER	ADJUSTED GROSS INCOME	
# DOCUMENT			•	-

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)

11/1/2021 Page 3 of 10

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	Con	d.	Value	AND/C
1040	Т	FORM 1040	HOH STATUS	=	~	Χ	AND [
1040	Т	FORM 1040	TAXPAYER CLAIMED AS DEP	<>	~	Х	AND [
1040	Т	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	Т	FORM 1040	TAXPAYER CLAIMED AS DEP	<> V	Х	AND [
1040	Т	FORM 1040	AGI	< 🔻	160000	AND [
(000000000000
1040	Т	FORM 1040	MFJ STATUS	= 🗸	Х	OR [1

I	1040	Т	FORM 1040	WIDOWER STATUS	=	~	Х	E,
ı)							

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

Product	Form	Form Name	Field Name	Cond.	d. Value AND	
1040	Т	FORM 1040	AGI	< 🗸	80000	AND C
1040	Т	FORM 1040	TAXPAYER CLAIMED AS DEP	<> V	Х	
(
1040	Т	FORM 1040	SING STATUS	- ~	X	.~

	1040	Т	FORM 1040	MFS STATUS	= ~	X	E,
ľ)						

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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.	d. Value A		/c
1040	Т	FORM 1040	UNEMPLOYMENT	<> V		AND	
(
1040	Т	FORM 1040	AGI	<= ∨	150000	OR	Ŀ
1040	Т	FORM 1040NR	ADJ GROSS INCOME PAGE 1	<= ∨	150000		.~

Query for Unemployment Received if Dual Status Return

1040	Т	DUAL STATUS TAXPAYER	UNEMPLOYMENT COMPENSATION	<> ∨		AND [
(
1040	Т	DUAL STATUS TAXPAYER	ADJUSTED GROSS INCOME	<= 🗸	150000	OR [
1040	Т	DUAL STATUS TAXPAYER	NR ADJUSTED GROSS INCOME	<= '	150000	Ŀ,

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Form

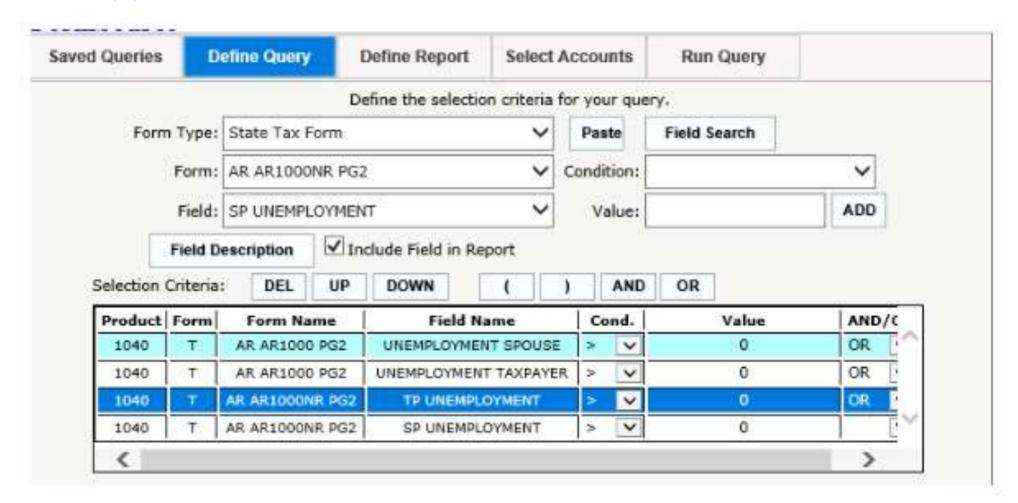
Arkansas

Year

2020

Description

Arkansas Unemployment 2020 Tax Year



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Form

Form 2210

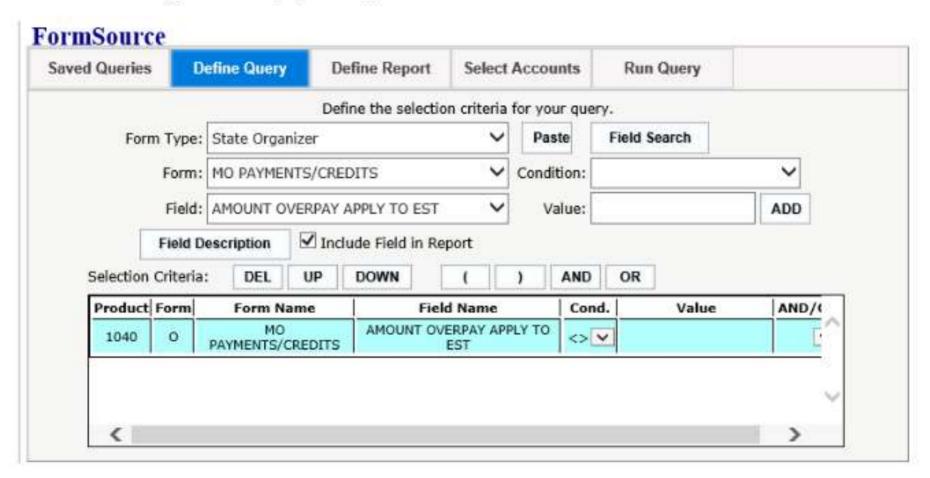
Year

2020

Description

1040 Form 2210 Missing 2019 Overpayment Applied to Estimated Tax Amount

Form 2210 Missing 2019 Overpayment Applied to Estimated Tax Amount



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Form

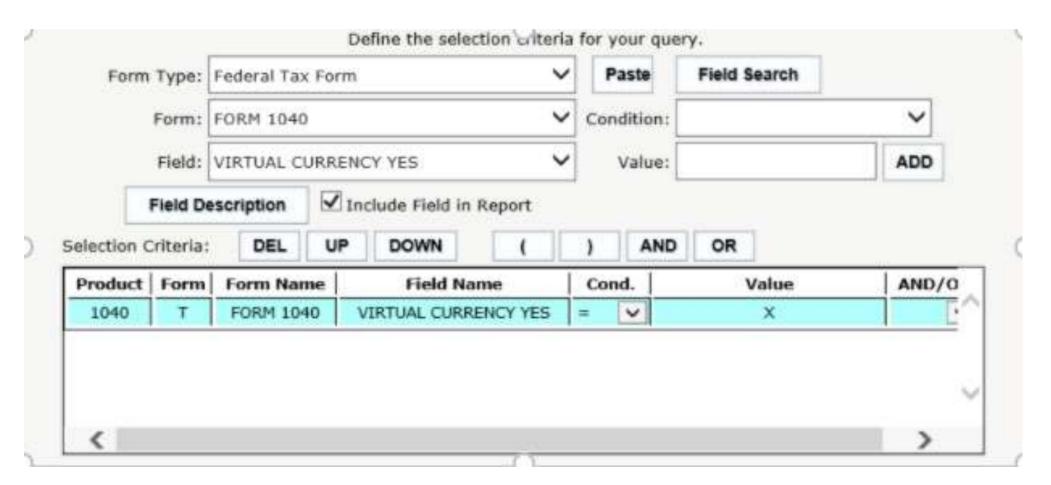
Form 1040

Year

All Years

Description

1040 Taxpayers Indicating Virtual Currency



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Form

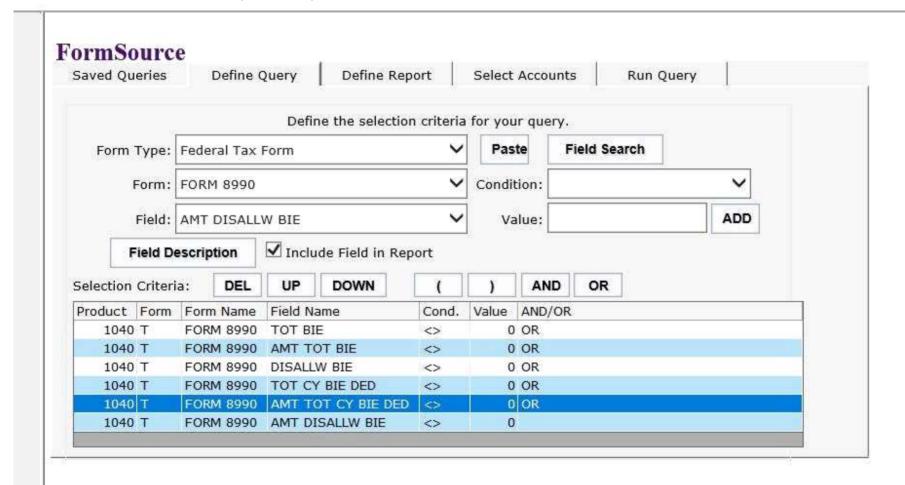
Form 8990

Year

All Years

Description

1040 Form 8990 Limited Business Interest Expense Query



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Form

Form 461

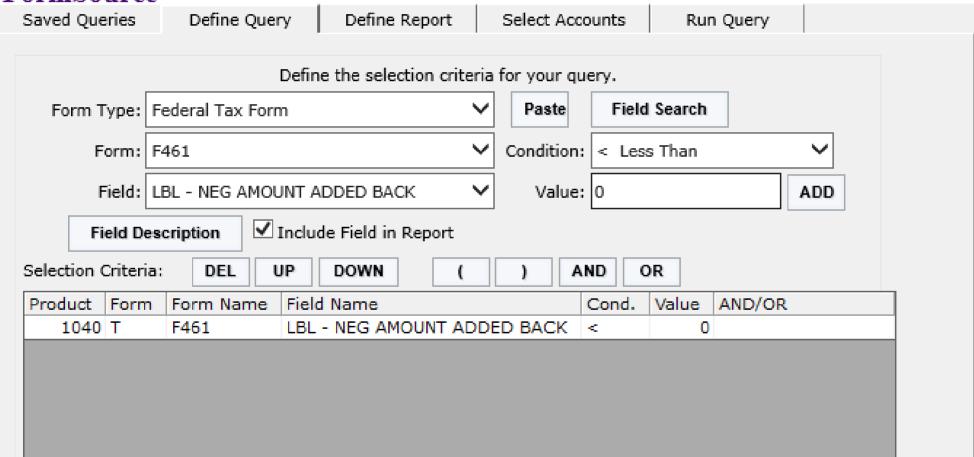
Year

All Years

Description

1040 Form 461 Limited Business Loss Query

FormSource



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