

1041 DISASTER ASSISTANCE DESIGNATION

FEDERAL

To enter disaster designations for the 1041 federal return, do the following:

1. Go to **Organizer > General Information > Basic Return Information > Return Information**.
2. Scroll to the **Disaster Relief Provisions** section at the bottom of the screen.
3. Enter the IRS-issued Disaster Designation.

The screenshot shows a section titled "DISASTER RELIEF PROVISIONS". Below the title, there are two rows of input fields. The first row is labeled "Disaster....." and has a text input box. The second row is labeled "Due date (Override)....." and has a date input box.

Figure 1

4. Go to **Organizer > Letters and Filing Instructions > Filing Instruction Options**.
5. Enter the IRS-designated extended due date.

The screenshot shows a section titled "FEDERAL FILING INSTRUCTIONS". Below the title, there is a paragraph: "The options below, set in tax defaults by your firm administrator, can be overridden on this screen." Below this paragraph is a checkbox labeled "Print 'as soon as possible' instead of override/original due date". At the bottom, there is a row with the label "Due date of the return (Override)....." and a date input box.

Figure 2

STATES

If the IRS extends the federal return due date as a result of a natural disaster or other event, then states may adopt the same provision. If this is the case for any of the states that you are processing OR any state-specific events that might exist which are not adopted by the IRS, then take the following steps:

States Adopting the IRS Extension Provisions

1. Enter the federal information as indicated above.
2. Go to **Organizer > States > Common State > State Disaster Provisions**.
3. Check **Print Heading** for those states adopting the IRS extension provision.

[HELP](#)

[State Disaster Provisions](#)

Mark the states and enter the state provision heading:

	Print Heading	Heading		Print Heading	Heading
Alabama	<input type="checkbox"/>		Arizona	<input type="checkbox"/>	
Arkansas	<input type="checkbox"/>		California	<input type="checkbox"/>	
Colorado	<input type="checkbox"/>		Connecticut	<input type="checkbox"/>	
Delaware	<input type="checkbox"/>		District of Columbia	<input type="checkbox"/>	
Georgia	<input type="checkbox"/>		Hawaii	<input type="checkbox"/>	
Idaho	<input type="checkbox"/>		Illinois	<input type="checkbox"/>	
Indiana	<input type="checkbox"/>		Iowa	<input type="checkbox"/>	
Kansas	<input type="checkbox"/>		Kentucky	<input type="checkbox"/>	
Louisiana	<input type="checkbox"/>		Maine	<input type="checkbox"/>	
Maryland	<input type="checkbox"/>		Massachusetts	<input type="checkbox"/>	
Michigan	<input type="checkbox"/>		Minnesota	<input type="checkbox"/>	
Mississippi	<input type="checkbox"/>		Missouri	<input type="checkbox"/>	
Montana	<input type="checkbox"/>		Nebraska	<input type="checkbox"/>	
New Hampshire	<input type="checkbox"/>		New Jersey	<input type="checkbox"/>	
New Mexico	<input type="checkbox"/>		New York	<input type="checkbox"/>	
North Carolina	<input type="checkbox"/>		North Dakota	<input type="checkbox"/>	
Ohio	<input type="checkbox"/>		Oklahoma	<input type="checkbox"/>	
Oregon	<input type="checkbox"/>		Pennsylvania	<input type="checkbox"/>	
Rhode Island	<input type="checkbox"/>		South Carolina	<input type="checkbox"/>	
Tennessee	<input type="checkbox"/>		Utah	<input type="checkbox"/>	
Vermont	<input type="checkbox"/>		Virginia	<input type="checkbox"/>	
West Virginia	<input type="checkbox"/>		Wisconsin	<input type="checkbox"/>	

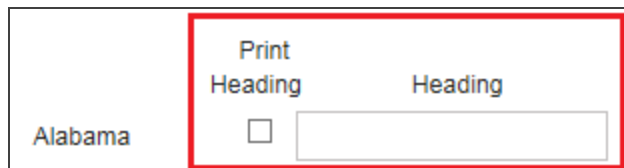
Federal Disaster Provisions

Figure 3

4. Perform a full recompute. The **Heading** field will be populated with the same entry made in the **Federal Disaster Provision** field. This information will print at the top of the state return.
5. If the state requires different text, then override the **Heading** field with the required wording.

Other Situations Requiring Unique State-Specific Heading Information

1. Check **Print Heading** for a specific state.



The screenshot shows a software interface for the state of Alabama. On the left, the word "Alabama" is displayed. To its right, there is a section enclosed in a red border. This section contains the text "Print Heading" above a checkbox, and the word "Heading" above a text input field. The checkbox is currently unchecked.

Figure 4

2. Enter the unique, state-specific heading information. This information does not have to be entered in the **Federal Disaster Provision** field.
3. Perform a full recompute. This information will print at the top of the state return.

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