

Federal

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule	Requirement(s) to Print
FinCEN Form 114: Report of Foreign Bank and Financial Accounts	Organizer Foreign Info Foreign Financial Accounts Enter Name of Financial Institution Common Info - FinCEN 114 - must select ownership code for page 1; for page 2, Part III, select joint ownership code and go to Part III; for page 3, Part IV - select applicable ownership code and go to Part IV; for page 4, Part V, select applicable ownership code and go to Part V OR Organizer Foreign Info Foreign Financial Accounts General Info - FinCEN 114 and "Yes" to "Filer has a financial interest in 25 or more financial accounts" will generate page 1 only. Please also ensure at Organizer Foreign Info Foreign Financial Assets General Info FinCEN 114 - Return and Print Options that FinCEN is selected to print.
FinCEN Form 114a: Record of Authorization to Electronically File FBARs	Organizer Foreign Info Foreign Financial Accounts Enter Name of Financial Institution Common Info - FinCEN 114 - must select ownership code for any page and any Part OR Organizer Foreign Info Foreign Financial Accounts General Info - FinCEN 114 and "Yes" to "Filer has a financial interest in 25 or more financial accounts" will generate page 1 only.
Form 1040: U.S. Individual Income Tax Return	Form 1040 will print when the return is set up as a resident return (filing status selected on General Information Taxpayer Information) or a dual status return.
Form 1040-ES (NR): U.S. Estimated Tax for Nonresident Alien Individuals	This form will print if the return is a Non-resident return and the sum of all estimated payments is \$500 or more. There is also a Force print selection for 1040-ES(NR). Navigate to Organizer, General Information, Return and Print Options. Go to the Print Options tab. The force print checkbox is in Print Selections.
Form 1040-ES: Estimated Tax for Individuals	This form will print if the return is NOT a nonresident return and the sum of all estimated payments is \$500 or more. There is also a Force print selection for 1040-ES. Navigate to Organizer, General Information, Return and Print Options. Go to the Print Options tab. The force print checkbox is in Print Selections.
Form 1040NR: U.S. Nonresident Alien Income Tax Return	This form will print when the return is set up as a nonresident or dual status return. To setup the return as a Non-resident return using Form 1040NR: 1. Ensure the Form 1040 filing status is set to None selected (Organizer, General Information, Basic Return Information, Taxpayer Information). 2. Navigate to Organizer, Foreign Information, Nonresident Alien, General Information. Establish the Form 1040NR filing status. To setup the return as a Dual Status return using Form 1040NR: 1. Ensure both the Form 1040 filing status is set to None selected (Organizer, General Information, Basic Return Information, Taxpayer Information), and the Non-resident Alien filing status is set to None selected (Organizer, Foreign Information, Nonresident Alien, General Information). 2. Navigate to Organizer, Foreign Information, Dual Status Taxpayer, Dual Status Taxpayer, and setup the return to use 1040NR and click the Initialize button.
Form 1040-SR - U.S. Tax Return for Seniors	
Form 1040V: Payment Voucher	Form 1040-V will print when there is an amount on the voucher. See Tax Forms, Federal, 1040-V - Payment Voucher. The voucher will print when there is an amount. The form will also print if there is an amount on the 965 voucher.

Form 1040X: Amended U.S. Individual Income Tax Return	This form will print when requested through organizer entry. Navigate to Organizer, General Information, Amended Return, Basic Data 1040X. In the Step 1 box, select either Filed Return was Computed on this software (system will compute original data), or Filed Return was altered or not computed on this software (user will input original data).
Form 1042-S: Foreign Person's US Source Income Subject to Withholding	This form is source input only. It is not printed. For source input navigate to Organizer, Source Documents (W-2, 1099s, 1098), 1042-S
Form 1045: Application for Tentative Refund	This form will print when there is NOL amount on Schedule A line 25, or if there is an unused general business credit on line 1b.
Form 1098-C: Contributions of Motor Vehicles, Boats, and Airplanes	This form is source entry and is not printed with the return. It is however efiled associated with Form 8283. Navigate to Organizer, Itemized Deductions, Contributions. 1098-C can be entered for either Section A or Section B donated property. When an donation is created, the link Vehicle Donation Statements will lead to the entry screen for Form 1098-C
Form 1098-T: Tuition Statement	This form is not printed. It is source entry only.
Form 1099-G: Certain Government Payments	This form is not printed. It is source entry only.
Form 1099-K: Payment Card and Third Party Network Transactions	This form is not printed. It is source entry only.
Form 1099-MISC: Miscellaneous Income	This form is not printed. It is source entry only.
Form 1099-NEC: Non-Employee Compensation	This form is not printed. It is source entry only.
Form 1099-Q: Payments for Qualified Education Programs	This form is not printed. It is source entry only. Navigate to Organizer, Source Documents (W-2, 1099s, 1098), 1099-Q. Create an item and enter data.
Form 1099-QA: Distributions from ABLE Accounts	This form is not printed. It is source entry only. Navigate to Organizer, Source Documents (W-2, 1099s, 1098), 1099-QA. Create a QA Payer item and enter data.
Form 1099-SA: Distributions from and HAS, Archer HAS or Medicare Advantage MSA	This form is not printed. It is source entry only.
Form 1116 (AMT): Recomputed Computation of Foreign Tax Credit for AMT	1. A value exists on Tax Forms Federal 1116 AMT - Foreign Tax Credit Page 2 - Totals Line 15. 2. Tax Forms Federal 1116 AMT - Foreign Tax Credit page 2 - Totals Line 30 does not equal Tax Forms Federal 1116 - Foreign Tax Credit Page 2 - Totals line 30. 3. Organizer Foreign Information Foreign Tax Credit Foreign Tax Credit Options Print Options section uncheck the box: Suppress printing of Form 1116. 4. Tax Forms Federal 6251 - Alternative Minimum Tax Page 1 tab Line 35 AMT is greater than NONE. 5. Organizer Taxes Alternative Minimum Tax Compute and Print do not select the first radio button: Suppress the printing of Form 6251 and related schedules.

Form 1116: Foreign Tax Credit	1. Organizer Foreign Information Foreign Tax Credit Foreign Tax Credit Options Print Options section uncheck the box: Suppress printing of Form 1116. 2. Organizer Foreign Information Foreign Tax Credit Foreign Tax Credit Options Compute Options section uncheck the box: Claim the credit without filing Form 1116 (Automatic).
Form 1310: Statement of Person Claiming Refund Due a Deceased Taxpayer	This form will print when requested at Organizer, Informational Forms, Deceased Refund. Select either or both: Taxpayer Deceased Refund, and Spouse Deceased Refund. A selection must be made for person claiming refund for deceased taxpayer. The Personal Representative box must be left blank. For the form to print, there must be a refund due and a date of death entered on the taxpayer information organizer.
Form 14039: Identity Theft Affidavit	This form is a non-calculating form. It will print when any of the Section A checkboxes are marked. Navigate to Organizer, Non-Calculating Forms, Form 14039 - Identity Theft Affidavit. Complete the fields on the screen.
Form 2106: Employee Business Expenses	Organizer Adjustments to Income Employee Business Expense Expenses Business Expense Information Occupation Info 2106 - an occupation name must be entered (mandatory)
Form 2210: Underpayment of Estimated Tax by Individuals, Estates, and Trusts	Print conditions for Form 2210 can be found by navigating to Organizer, General Information, Return and Print Options. Go to Tax Form Options (contd) tab. See Form 2210 - Underpayment of Estimated Tax box.
Form 2210-F: Underpayment of Estimated Tax by Farmers and Fishermen	This form will print based on Compute and Print options selections made in the organizer. Navigate to Organizer, Estimates and Penalties, Underpayment, 2210 Penalty. Form 2210-F will print when the checkbox: Taxpayer is a farmer or fisherman (Form 2210-F, is checked.
Form 2350: Application for Extension of Time to File U.S. Income Tax Return (For U.S. Citizens and Resident Aliens Abroad)	Organizer Foreign Information Foreign Earned Income Application for Extension Date return is to be filed (Mandatory).
Form 2439: Notice to Shareholder of Undistributed Long-Term Capital Gains	This form is a non-calculating form. It will print when there is an amount on line 1a Total undistributed long-term capital gains. Navigate to Organizer, Non-Calculating Forms, Form 2439 – Notice S.H Undist LT Cap Ga. Complete the fields on the screen.
Form 2441: Child and Dependent Care Expenses	For Form 2441 to print, the following conditions must be Yes: (1) At least one care provider must be present for Page 1 of Form 2441 to print. (2) Data must be present on line 12 of Form 2441 for Page 2 to print. To enter child and dependent care information navigate to Organizer, Credits, Child and Dependent Care Credit.
Form 2555: Foreign Earned Income	1. Organizer Foreign Earned Income employer name Exclusions and/or Deduction hyperlink: Optimize Between the Section 911 Exclusion and Foreign Tax Credit dropdown: do not select "No exclusions (No Form 2555 will be printed)". 2.. Organizer Foreign Earned Income employer name General Information scroll down to Print Options section uncheck the box: Suppress printing Form 2555 or 2555-EZ.

Form 2848: Power of Attorney and Declaration of Representative	This form will print when at least one representative is selected as having POA authorization. Navigate to Organizer, Informational Forms, Power of Attorney, Taxpayer (or Spouse), Representative from Tax Defaults. At least one representative must be included. Enter POA information on the General Information screen. Representatives can be defined in Tax Defaults. Add new Representatives will allow for representatives to be created and included in the POA within the return.
Form 3115: Application for Change in Accounting Method	Organizer Informational Forms Change in Accounting Method add a new Change in Accounting Method Adding a Change in Accounting Method is all that is needed to print this form.
Form 3468: Investment Credit	1. This form will print when there is an amount on Form 3468, Page 1, line 10. This amount represents the Qualifying Advanced Coal Project Credit, Qualifying Gasification Project Credit, and Qualifying Advanced Energy Project Credit. 2. This form will print when there is an amount on Form 3468, Page 3 line 14. This amount represents the Rehabilitation Credit and Energy Credit. It is also possible to force print form 3468. Navigate to Organizer Credits Investment Tax Credit General Information Print Options
Form 3520: Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts	Organizer Foreign Info Forms 3520 & 3520-A General Info - Page 1, 2, 6 - add name of Foreign Trust AND select Type of Return AND Reason(s) for filing Page 3 - organizer input to generate Part I, lines 15 -18 or Sch C Page 4 - organizer input to generate Part II or Part III Page 5 organizer input to generate Part III, Sch A and B AND Organizer Foreign Info Forms 3520 & 3520-A General Info - Print options - Form not suppressed
Form 3520-A: Annual Information Return of Foreign Trusts with a U.S Owner	Organizer Foreign Info Forms 3520 & 3520-A Parts 2 - 4 General Info - Page 1 Yes to US Owner of a Foreign Trust Page 2 - Form 3520-A Only - Organizer input for Part II or III Page 3 - Form 3520-A Only - Add Name of US Owner Page 4 - Beneficiary - Add new and select checkbox for US Beneficiary
Form 3800: General Business Credit	This form will print when there is an amount on Form 3800, Page 2, line 38. This amount represents the Credit allowed for the current year.
Form 3903: Moving Expenses	This form will print when a Moving Expenses item exists in the system, there are moving expenses on line 5 of the item, and the item meets the distance test where the distance from the new location to the place of work is 50 miles or greater than the distance from the old location to the place of work (members of the armed forces who have expenses due to permanent change in station do not have to meet the distance test). Navigate to Organizer, Adjustments to Income, Moving Expense to create a Moving Expense item. There is a checkbox to indicate that the move is associated with a member of the armed forces,
Form 4136: Credit for Federal Tax Paid on Fuels	This form will print when line 17 has an amount. This field represents the total credit claimed. See: Organizer Credits Fuel Tax Credit Enter any information
Form 4137: Social Security and Medicare Tax on Unreported Tip Income	Form 4137 will print when there is an amount on line 13 which represents the Social Security and Medicare tax on unreported income for either the taxpayer or spouse that needs to be reported as additional tax. Separate Forms 4137 will print for the taxpayer and spouse.

Form 4255: Recapture of Investment Credit	This form will print when there is an amount on any of the following lines have an amount: 1. Form 4255, line 9. This amount represents Recapture From Increase in Nonqualified Nonrecourse Financing . 2. Form 4255, line 16. This amount represents Recapture From Disposition of Property or Cessation of Use as Investment Credit Property.
Form 4562: Depreciation and Amortization	Form 4562 will print when any of the following are claimed: 1) Depreciation for property placed in service during the current tax year (lines 19a-i, or 20a-c). 2) Section 179 expense deduction (line 8) including any carryover from the previous year (line 10) 3) Depreciation on any listed property (line 21) 4) Amortization of costs beginning in the current year (line 42) It is also possible to force print form 4562. Navigate to Organizer, General Information, Return and Print Options. Under the Depreciation Options tab are various print options.
Form 4563: Exclusion of Income for Bona Fide Residents of American Samoa	This form is a non-calculating form meaning no amounts on the form will flow to the tax return. It will print when there is an amount on line 15 indicating an amount that is excluded from gross income this tax year. Navigate to Organizer, Non-Calculating Forms, Form 4563 – Excl Income Res Am Samoa. Complete the fields on the screen.
Form 461: Limitation on Business Losses	
Form 4684: Casualties and Thefts	This form will print when the following exists for a Casualty defined in the Organizer: Part I: An amount exists on line 15, or an amount exists on line 16 and Schedule A is in the return. Page 2: An amount exists on either line 31, line 32, line 38a, line 38b or line 39. Page 3: There is an income producing loss due to a Ponzi scheme Navigate to Organizer, Gains and Losses, Casualties and Thefts to define Casualties.
Form 4797 (AMT): Recomputed Sales of Business Property for AMT	This form will print with either lines 7, 17, 18a, 18b, on page 1 contain amounts, or when either lines 30, or 35a or 35b contain amounts.
Form 4797: Sales of Business Property	This form will print with either lines 7, 17, 18a, 18b, on page 1 contain amounts, or when either lines 30, or 35a or 35b contain amounts.
Form 4835: Farm Rental Income and Expenses	This form will print when there is an amount on Form 4835, line 32. This amount represents the net income (loss) associated with farm rental income. 1. Navigate to Organizer, Income, Farm Income to enter farm income. 2. On the Farm Information, Sch F Information tab, in the Miscellaneous Information box, check Form 4835 to designate the information associated with that farm as rental income.
Form 4868: Application for Automatic Extension of Time to File U.S. Individual Income Tax Return	Organizer Payments and Extensions Extensions Select applicable Federal Extension options to generate print
Form 4952 (AMT): Recomputed Investment Interest Expense Deduction for AMT	This form will print if there is a value in either line 1 or 2, or 4g, or 7.
Form 4952: Investment Interest Expense Deduction	This form will print if there is a value in either line 1 or 2, or 4g, or 7.

Form 4970: Tax on Accumulation Distribution of Trusts	This form will print when a trust exists and there is an amount on line 28 indicating that a tax on the accumulated distribution exists. For Organizer entry, navigate to Organizer, Taxes, Accumulated Distributions, General Information. Create trust items here.
Form 4972: Tax on Lump-Sum Distributions	This form will print when there is an amount on line 30 and the questions in Part I are answered and do not suppress the form. The form will print for either or both taxpayer and spouse. For Organizer entry, navigate to Organizer, Taxes, Lump Sum Distributions, and select either or both taxpayer and spouse.
Form 5074: Allocation of Individual Income Tax to Guam or the Commonwealth of the Northern Mariana Islands (CNMI)	This form is a non-calculating form meaning no amounts on the form will flow to the tax return. It will print when there is an amount on line 34 Total Payments. Navigate to Organizer, Non-Calculating Forms, Form 5074 – Alloc Indiv Inc Tax Guam/CN. Complete the fields on the screen.
Form 5329: Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts	This form will print when there are amounts on either of the following fields: 1, 2, 5, 9, 15, 17, 25, 33, 34, 39, 42, 47, 52, 55, or when print is selected via organizer input to early distribution print options. For source entry of early distributions and excess contributions, navigate to Organizer, Taxes, Retirement Plans and IRAs. To find the print options controlling Form 5329, see the Early Distributions folder, Print Options box.
Form 5405: Repayment of the First-Time Homebuyer Credit	This form will print when there is an amount on line 8 indicating that there is an amount of homebuyer credit to be repaid. For source entry, navigate to Organizer, Credits Repayment of the First-Time Homebuyer C.
Form 5471: Information Return of U.S. Persons with Respect to Certain Foreign Corporations	This form will print for all foreign corporations defined in the system whose print is not suppressed. Navigate to Organizer, Foreign Information, Foreign Corporation. Add new Foreign corporation Name will create a corporation. Within the corporation, navigate to General Information. There is a Print Options tab what will allow print of the form or specific schedules within the form to be suppressed.
Form 5695: Residential Energy Credits	This form will print when there is an amount on any of the following lines: 1. Form 5695, Page 1, line 15. This amount represents the Residential energy efficient property credit. 2. Form 5695, Page 1, line 16. This amount represents the Credit carryforward to the next year. 3. Form 5695, Page 2, line 30. This amount represents the Nonbusiness energy property credit.

Form 5884: Work Opportunity Credit

1. Organizer | Credits | Miscellaneous Credits | Work Opportunity Credit | Other source (any number) | Fill out "Number of Employees" and "Total Wages" on the same line for any of the options listed or enter amount for Work Opportunity Credit from flow-through entities. 2. Organizer | Income | Business Income | Activity Name | Credits | Work opp Credit | Fill out "Number of Employees" and "Total Wages" on the same line for any of the options listed or enter amount for Work Opportunity Credit from flow-through entities. 3. Organizer | Income | Farm Income | Activity Name | Credits | Work opp Credit | Fill out "Number of Employees" and "Total Wages" on the same line for any of the options listed or enter amount for Work Opportunity Credit from flow-through entities. 4. Organizer | Income | Schedule K1 Income | Activity Name | Credits | Work opp Credit | Fill out "Number of Employees" and "Total Wages" on the same line for any of the options listed or enter amount for Work Opportunity Credit from flow-through entities. 5. Organizer | Income | Rent and Royalty | Activity Name | Credits | Work opp Credit | Fill out "Number of Employees" and "Total Wages" on the same line for any of the options listed or enter amount for Work Opportunity Credit from flow-through entities.

Form 6198 (AMT):
Recomputed At-Risk
Limitations for AMT

This form will print when there is an At Risk loss affecting AMT computed for any income activity (a business, rent or royalty, or farm, or from a Schedule K-1 or Schedule K-1 PTP). For Organizer entry, navigate to Organizer, Income, then select the activity type and the activity itself. Within each activity is an At Risk path to the source entry screens.

Form 6198: At-Risk Limitations

This form will print when there is an At Risk loss computed for any income activity (a business, rent or royalty, or farm, or from a Schedule K-1 or Schedule K-1 PTP). For Organizer entry, navigate to Organizer, Income, then select the activity type and the activity itself. Within each activity is an At Risk path to the source entry screens.

Form 6251: Alternative
Minimum Tax - Individuals

This form will print with either of the following conditions exists: An amount exists on line 35. An current year general business credit is computed on Form 3800. A minimum tax credit or credit carryforward to next year is created on Form 8801, a qualified electric vehicle credit is computed on Form 8834, or an alternative fuel vehicle refueling property credit is computed on Form 8911.

Form 6252 (AMT):
Recomputed Installment Sale
Income for AMT

This form will print when there is an amount on line 24 representing installment sale income on sale of an asset, or an amount on line 35 representing related party installment sale income. Installment sale information can be entered within the gains and losses folder within an income item (business, rent and royalty, Schedule K-1, Schedule K-1 PTP, or Farm), or within the Gains and Losses section of the Organizer.

Form 6252: Installment Sale
Income

This form will print when there is an amount on line 24 representing installment sale income on sale of an asset, or an amount on line 35 representing related party installment sale income. Installment sale information can be entered within the gains and losses folder within an income item (business, rent and royalty, Schedule K-1, Schedule K-1 PTP, or Farm), or within the Gains and Losses section of the Organizer.

Form 6765: Credit for
Increasing Research Activities

This form will print when there is an amount on any of the following lines have an amount: 1. Form 6765, Page 2, line 38. This amount represents Section C - Current Year Credit. 2. Form 6765, Page 2, line 44. This amount represents Section D - Qualified Small Business Payroll Tax Election and Payroll Tax Credit.

Form 6781: Gains and Losses from Section 1256 Contracts and Straddles	This form will print when there are any amounts on lines 2a, 2b, 4, 11a, 11b, 13a, 13b, or 14e.
Form 7202: Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals	
Form 7203: S Corporation Shareholder Stock and Debt Basis Limitations	This form will print if Schedule E, page 2, line 28, column E is checked for the S-Corporation.
Form 7205: Energy Efficient Commercial Building Deduction	
Form 7206: Self-Employed Health Insurance Deduction	This form will print if there are self-employed health insurance with 1) more than one source of income subject to the self-employment tax or 2) Filing Form 2555 or 3) Qualified long-term care insurance is used to figure the deduction. The form will not print if the Premium Tax Credit is being calculated or the self-employment health insurance deduction worksheet in the Form 1040 instructions can be used.
Form 8082: Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)	This form is an informational form. It will print when there is an Inconsistent Treatment item. There can be multiple Forms 8082. Navigate to Organizer, Informational Forms, Inconsistent Treatment. Create items here and populate with data.
Form 8275: Disclosure Statement	This form is a non-calculating form meaning no amounts on the form will flow to the tax return. It will print when there is a disclosure item, and the item has a disclosure type: Disclosure selected. Navigate to Organizer, Non-Calculating Forms, Form 8275/8275R – Disclosure Statement to create a disclosure item. Complete the fields on the Disclosure Information screen.
Form 8275-R: Regulation Disclosure Statement	This form is a non-calculating form meaning no amounts on the form will flow to the tax return. It will print when there is a disclosure item, and the item has a disclosure type: Regulation Disclosure selected. Navigate to Organizer, Non-Calculating Forms, Form 8275/8275R – Disclosure Statement to create a disclosure item. Complete the fields on the Disclosure Information screen.
Form 8283: Noncash Charitable Contributions	This form will print when either: 1) At least one Section A Donated Property item exist that has an amount in column (h) Fair Market value 2) At least one Section B Donated Property Item exists that has an amount in column (h) Amount claimed as a deduction. Navigate to Organizer, Itemized Deductions, Contributions to create Section A and Section B donated property items and enter the information associated with the donation.
Form 8288-A: Statement of Withholding on Disposition by Foreign Persons of US Real Property Interests	This form is a source document. It does not print. It is efiled. Navigate to Organizer, Source Documents (W-2, 1099s, 1098), 8288-A.

Form 8379: Injured Spouse Allocation	This form is a non-calculating form meaning no amounts on the form will flow to the tax return. It will print when there is an amount on page 2 on either lines 13, 14, 15, 16, 17, 18, 19, or 20. Navigate to Organizer, Non-Calculating Forms, Form 8379 - Injured Spouse Allocation. Complete the fields on the Form 8379, Page 1 and Page 2 screens.
Form 8396: Mortgage Interest Credit	This form will print when there is an amount on line 9, or an amount on line 17 of the form. For source entry for this credit, navigate to Organizer, Credits, Home Mortgage Int.
Form 8453: U.S. Individual Income Tax Transmittal for an IRS E-file Return	1. If Federal E-file is enabled and EFIN entered in Organizer, E-file, Enable/Create AND 2. One of the forms listed in Organizer, E-file, Attachments, Form 8453 attachments is checked as attached
Form 8582 (AMT): Recomputed Passive Activity Loss Limitation for AMT	This form will print if there is a value in either lines 1(a, b, or c), 2(a, b, or c), or 3(a, b, or c).
Form 8582: Passive Activity Loss Limitation	This form will print if there is a value in either lines 1(a, b, or c), 2(a, b, or c), or 3(a, b, or c).
Form 8582-CR: Passive Activity Credit Limitation	This form will print if there is a value in line 5.
Form 8586: Low-Income Housing Credit	This form will print when any of the following lines have an amount: 1. Form 8586, line 5. This amount represents Buildings Placed in Service Before 2008. 2. Form 8586, line 12. This amount represents Buildings Placed in Service After 2007.
Form 8594: Asset Acquisition Statement	Organizer Non-Calculating Forms Form 8594 Asset Acquisition Stmt Add new Statement
Form 8606: Nondeductible IRAs	Organizer Adjustments to income IRA OR Organizer Source Docs 1099-R : input to generate an amount on one of forms lines 3, 14, 15a, 18, 22, 24, or 25a. OR Organizer Adjustments to income IRA IRA Values Compute and Print options - Force compute and print
Form 8611: Recapture of Low Income Housing Credit	This form will print when there is an amount on Form 8611, line 12. This amount represents Total Amount Subject to Recapture.
Form 8615: Tax for Certain Children Who Have Unearned Income	Organizer Income Kid-Tax Income Tax for Children and follow instructions on screen OR Organizer Income Kid-Tax Income Kid Tax Overrides - Print Options - Force Print
Form 8621: Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund	Page 1 - 2 - Organizer Foreign Info Return by a Shareholder of a PFIC Add Name of PFIC General AND no suppress options selected in Compute Options . Page 3 -Organizer Foreign Info Return by a Shareholder of a PFIC Dist and Disp of Stock in 1291 Fund Add new Current Year Total Dist Amount
Form 8689: Allocation of Individual Income Tax to the U.S. Virgin Islands	Organizer Non-Calculating Forms Form 8689 Alloc of Ind Tax US Virgin Islands Line 29
Form 8697: Interest Computation Under the Look-Back Method for Completed Long-Term Contracts	Organizer Adjustments to Income Look Back Int for Contracts Add Current or other year Regular or Simplified Method - input must generate a net amount of interest to be refunded to you (Line 9 on form) or net amount of interest you owe (Line 10) to generate print

Form 8801: Credit for Prior Year Minimum Tax - Individuals, Estates, and Trusts	Organizer Taxes Alternative Min Tax Credit for PY AMT - input to generate an amount on one of the following form lines: 19, 20 or a positive amount on 21, 25, or 26 and print not suppressed OR Organizer Taxes Alternative Min Tax Credit for PY AMT - Print Option Force Print
Form 8805: Foreign Partners Information Statement of Section 1446 Withholding Tax	Organizer Income Schedule K-1 Foreign Partner's Info - Print Form 8805 for this K-1 and input for either ECTI or Tax Credit
Form 8814: Parents' Election to Report Child's Interest and Dividends	Organizer Income Kid-tax Income Childs Int. and Div. Name of Child Childs gross income must be less than \$10,500.
Form 8815: Exclusion of Interest from Series EE and I U.S. Savings Bonds Issued After 1989	This form will print when there is an amount on line 14, Excludable savings bond interest. This amount represents the nontaxable portion of the proceeds from the sale of certain types of US Savings Bonds used to pay for qualified educational expenses. This amount flows to Schedule B.
Form 8822: Change of Address	Organizer Informational Forms Change of Address - enter old address
Form 8824 (AMT): Recomputed Like-Kind Exchanges for AMT	Form 6251 AND Organizer Gains & Losses Like-Kind Exchanges or Organizer Income K-1 or other activity Gains & Losses Like-Kind Exchanges - input to generate lines 1, 2, 19, 23, or 24 OR Organizer Gains & Losses Like-Kind Exchanges - Force print 8824 for installment method
Form 8824: Like-Kind Exchanges	Organizer Gains & Losses Like-Kind Exchanges or Organizer Income K-1 or other activity Gains & Losses Like-Kind Exchanges - input to generate lines 1, 2, 19, 23, or 24 OR Organizer Gains & Losses Like-Kind Exchanges - Force print 8824 for installment method
Form 8826: Disabled Access Credit	This form will print when there is an amount on Form 8826, line 8. This amount represents Current Year Disabled Access Credit. It is also possible to force print form 8826. Navigate to Organizer Credits Miscellaneous Credits General Information Print Options.
Form 8829: Expenses for Business Use of Your Home	Organizer Business Income Name of Business Office-in-Home input to generate an amount on line 36 of form
Form 8833: Treaty-Based Return Position Disclosure	Organizer Foreign Info Treaty-Based Position Disclosure Add new Treaty Country and select treaty country AND input Article(s)
Form 8835: Renewable Electricity, Refined Coal, and Indian Coal Production Credit	Tax Forms Federal Form 8835 input to generate an amount on line 20 or 22
Form 8838-P: Consent to Extend the Time To Assess Tax Pursuant to the Gain Deferral Method (Section 721(c))	Organizer Foreign Information Foreign Partnership add new Foreign Partnership Schedule O Form 8838-P.

Form 8839: Qualified Adoption Expenses	Page 1: Organizer Credits Adoption Expense Credit - There must be data entered for the "Child's Identification Number". Page 2: Organizer Credits Adoption Expense Credit - There either needs to be data for 1. "Total amount of your employer-provided adoption benefits received. This amount should be shown in Box 12 of your current year W-2 (s) with code T" or 2. The name and address of an agency or agent that assisted in an unsuccessful adoption.
Form 8840: Closer Connection Exception Statement for Aliens	1040 Non-resident return AND Organizer Foreign Info Forms 8840 & 8843 General Info - select Mandatory print option
Form 8843: Statement for Exempt Individuals and Individuals with a Medical Condition	1040 Non-resident return AND Organizer Foreign Info Forms 8840 & 8843 General Info - select Mandatory print option
Form 8846: Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips	This will print when there is an amount on Form 8846, line 6. This amount represents Current Year Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips. It is also possible to force print form 8846. Navigate to Organizer Credits Miscellaneous Credits General Information Print Options
Form 8853: Archer MSAs and Long-Term Care Insurance Contracts	Organizer Adjustments to Income MSA Deductions and LTC contracts OR Source Documents W-2 -- input to generate an amount on line 5 or line 8 or line 12 of form
Form 8854: Initial and Annual Expatriation Statement	Organizer Informational Forms Initial and Annual Expatriation Statement - Add new ID number
Form 8858: Information Return of US Persons with Respect to Foreign Disregarded Entities	Organizer Foreign Info Foreign Disregarded Entity Page 1 - Add FDE Name Page 2 - organizer input to generate any line in Schedule C, C-1, F, or G Page 3 - input to generate any line for Schedule G or H Schedule M is automatic with any organizer input for Schedule M
Form 8859: Carryforward of the District of Columbia First-Time Homebuyer Credit	Tax Forms Federal Form 8859 input to generate an amount on line 3 or 4
Form 8863: Education Credits	This will print when there is an amount on either: 1. Form 8863, line 8. This amount represents Refundable American Opportunity Credit. or 2. Form 8863, line 19. This amount represents Nonrefundable Education Credits. It is also possible to force print this for by navigating to: Organizer Credits Education Credits Education Credits Compute and Print Options.
Form 8865: Return of U. S. Persons with Respect to Certain Foreign Partnerships	Organizer Foreign Information Foreign Partnership Add new Foreign Partnership.

Form 8867: Paid Preparer's Earned Income Credit Checklist	This form will print when it is selected for print, one of the Credit Claimed on the Return fields is checked (EIC, Child tax, American Opportunity, or HOH Filing Status) and Due Diligence question 15 is checked. 1. Navigate to Organizer, Credits, and either Child Tax Credit, Earned Income Credit, or Education Credits. Navigate then to Form 8867. 2. In the Paid Preparer Selection page, mark yes under the include column next to the paid preparer name to generate a Form 8867. 3. Within each Paid Preparer's page, check one of the mandatory Credit Claimed fields, and populate the Due Diligence Requirements as necessary. Question 15, Credit Eligibility Certification is mandatory.
Form 8878: IRS E-file Signature Authorization for Extensions (printed only for e-file)	Organizer E-file Extensions Signature Authorization Signature Option - Form 8879 Practitioner PIN and complete PIN information AND Organizer E-file Enable/Create Extension - Enable Federal Form 4868 and enter EFIN and create e-file
Form 8880: Credit for Qualified Retirement Savings Contributions	This form will print when there is a Credit for Qualified Retirement Savings Contribution amount on line 12. Organizer input including Force Print capability can be found at Organizer, Credits, Retirement Savings Contribution Credit.
Form 8881: Credit for Small Employer Pension Plan Startup Costs	This will print when there is an amount on Form 8881, line 5. This amount represents Current Year Credit for Small Employer Pension Plan Startup Costs. It is also possible to force print Form 8881. Navigate to Organizer Credits Miscellaneous Credits General Information Print Options.
Form 8882: Credit for Employer-Provided Child Care Facilities and Services	This will print when there is an amount on Form 8882, line 7. This amount represents Current Year Credit for Employer-Provided Childcare Facilities and Services. It is also possible to force print Form 8882. Navigate to Organizer Credits Miscellaneous Credits General Information Print Options.
Form 8885: Health Coverage Tax Credit	For Form 8885 to print, the data must be entered under Organizer Credits Health Insurance Credit (Taxpayer or Spouse), and result in Form 8885, line 5 having a calculated value. The form can also be force to print by entering a value on the following fields, for taxpayer and spouse respectively: Tax Forms Federal 8885 - Health Coverage Tax Credit Taxpayer Line 5 Drill Down Workpaper: Taxpayer Excess Advance HCTC Repayment Worksheet - Line 5 Line 7 Tax Forms Federal 8885 - Health Coverage Tax Credit Spouse Line 5 Drill Down Workpaper: Spouse Excess Advance HCTC Repayment Worksheet - Line 5 Line 7
Form 8886: Reportable Transaction Disclosure Statement	This form will print for each reportable transaction disclosure statement defined in the return. Navigate to Organizer, Informational Forms, Reportable Transaction Disclosure State to create reportable transaction statements.
Form 8888: Allocation of Refund	Refund on 1040 or 1040NR AND Organizer General Info Basic Return Info Bank Information - enter bank account information for one or more accounts AND Direct Deposit- amount to be deposited
Form 8889: Health Savings Account	Organizer Adjustments to Income HSA OR Source Documents W-2 -- input to generate an amount on line 13 or line 16 or line 20 of form
Form 8903 - Domestic Production Activities Deduction	Schedule 3 will print when there is an amount on line 55 (total nonrefundable credits). It will also print if the "Force print Schedules 1-6 even if no data is present" checkbox is checked on Organizer General Information Return and Processing Options Tax Form Options Form 1040 options.
Form 8906: Distilled Spirits Credit	This will print when there is an amount on Form 8906, line 5. This amount represents Current Year Distilled Spirits Credit.

Form 8908: Energy Efficient Home Credit	Tax Forms Federal Form 8908 input to generate a positive amount on line 4
Form 8910: Alternative Motor Vehicle Credit	This will print when there is an amount on Form 8910, line 15. This amount represents Current Year Credit for Personal Use Part of Vehicle - Alternative Motor Vehicle Credit.
Form 8911: Alternative Fuel Vehicle Refueling Property Credit	Tax Forms Federal Form 8911 input to generate a positive amount on line 19
Form 8912: Credit to Holders of Tax Credit Bonds	Tax Forms Federal Form 8911 Page 1 - input to generate an amount on line 4 Page 2 - input on line 13 Page 3 - input on line 15
Form 8915-C: Qualified Disaster Retirement Distributions and Repayments	
Form 8915-D: Qualified Disaster Retirement Distributions and Repayments	
Form 8915-F: Qualified Disaster Retirement Distributions and Repayments	
Form 8919: Uncollected Social Security and Medicare Taxes on Wages	Form 8919 will print when there is an amount on line 13. This line represents the social security and Medicare tax uncollected by the employer. Separate Forms 8919 will print for the taxpayer and spouse.
Form 8932: Credit for Employer Differential Wage Payments	Tax Forms Form 8932 input to generate a positive amount on line 4
Form 8936: Clean Vehicle Credits	This form will print if there is an amount on any of the following lines: 1. Form 8936, line 14. This amount represents Business/investment use part of credit. 2. Form 8936, line 23. This amount represents Personal use part of credit.
Form 8938: Statement of Specified Foreign Financial Assets	Organizer Foreign Info Foreign Financial Assets General Info Form 8938 and select Generate Form 8938 checkbox and input for either Part III, Part IV or a Part V or Part VI account.
Form 8941: Credit for Small Employer Health Insurance Premiums	Organizer Credits Small Employer Health Insurance Credit Name of Insurer and input to equal an amount on line 16, 17, 20, or 21 of the form.
Form 8948: Preparer Explanation for Not Filing Electronically	1. If Federal E-file is NOT enabled in Organizer, E-file, Enable/Create AND 2. If not suppressed in Organizer, E-file, Additional Information, E-file Opt Out Preparer Explanation
Form 8949 (AMT): Sale and Other Dispositions of Capital Assets for AMT	Form 6251 AND Organizer Gains and Losses Capital Gains and Losses OR Organizer Source Docs 1099-B OR Organizer Income Schedule K-1 or other activity Gains and Losses Capital Gains and Losses - - input to generate Box A, B,C, D, E, or F on form

Form 8949: Sale and Other Dispositions of Capital Assets	Organizer Gains and Losses Capital Gains and Losses OR Organizer Source Docs 1099-B OR Organizer Income Schedule K-1 or other activity Gains and Losses Capital Gains and Losses - - input to generate Box A, B,C, D, E, or F on form
Form 8958: Allocation of Tax Amounts Between Certain Individuals in Community Property States	Organizer Non-Calculating Forms Form 8958 Enter any income
Form 8959: Additional Medicare Tax	This form will print if any of the following lines have an amount: 1. Form 8959, line 24. This amount represents Total Additional Medicare Tax withholding. Must be greater than "NONE". 2. Form 8959, line 18. This amount represents Total Additional Medicare Tax. Must be greater than "NONE". 3. The sum of Form 8959 Line 4 and Line 8 is greater than Line 9. 4. Form 8959, Line 14 is greater than Line 15.
Form 8960: Net Investment Income Tax -- Individual, Estates, and Trusts	Organizer Taxes Net Investment Income Tax Force Print OR 1040 investment income to generate line 17 of Form 8960
Form 8962: Premium Tax Credit	This form will print when there is either an amount calculated for Net Premium Tax Credit, line 26, or Excess Advanced Premium Tax Credit, line 29.
Form 8978 - Partner's Additional Reporting Year Tax	
Form 8978, Schedule A - Partner's Additional Reporting Year Tax (Schedule of Adjustments)	
Form 8990: Limitation on Business Interest Expense Under Section 163(j)	Organizer Informational Forms Section 163 (j) General Information Input for Business Interest Expense Information There is also a Force print selection in Organizer Informational Forms Section 163 (j) General Information Force Print
Form 8992: US Shareholder Calculation of Global Intangible Low-Taxed Income (GILTI)	Organizer Foreign Information US Shareholder of GILTI Add new US shareholder enter Name of US shareholder
Form 8993: Section 250 Deduction for Foreign-Derived Intangible Income (FDII) and Global Intangible Low-Taxed Income (GILTI)	Organizer Foreign Information Section 250 FDII and GILTI General Information check Generate From 8993
Form 8994: Employer Credit for Paid Family and Medical Leave	
Form 8995: Qualified Business Income Deduction Simplified Computation	This form will print when line 1 has data

Form 8995-A including Schedules A-D: Qualified Business Income Deduction	This form will print when line 1 has data
Form 8997: Initial and Annual Statement of Qualified Opportunity Fund (QOF) Investments	
Form 9000 Alternative Media Preference	This form will print if a checkbox for ways to receive written communications is selected.
Form 926 - Return by a U.S. Transferor of Property to a Foreign Corporation	
Form 9325: Acknowledgment and General Information for Taxpayers Who File Electronically	1. If Federal E-file is enabled and EFIN entered in Organizer, E-file, Enable/Create AND 2. If not suppressed in Organizer, General Information, Return and Print Options, Tax Form Options, E-file Options.
Form 9465: Installment Agreement Request	Organizer Informational Forms Installment Agreement Request Generate a Form 9465 AND amount on line 5 of form
Form 965-A: Individual Report of New 965 Tax Liability	
Form 970: Application to Use LIFO Inventory Method	Organizer Informational Forms Application to Use LIFO Generate a Form 970
Form 982: Reduction of Tax Attributes Due to Discharge of Indebtedness	Organizer Informational Forms Reduction of Tax Attributes Select a reason for amount excluded AND enter total amount of discharge indebtedness (line 2 of form)
Form RRB-1099: Railroad Retirement Benefits	
Form SSA-1042S: Social Security Benefit Statement	
Form T: Forest Activities Schedule	Organizer Non-Calculating Forms Form T (Timber) Page 1 add Part I Page 2 add Part II Page 3 add Part III Page 4 input for Part IV
Form W-2: Wage and Tax Statement (printed only for e-filed return)	Organizer Source Docs W-2 input for W-2 AND Organizer E-file Enable/Create - Federal E-file enabled AND Organizer General Info Return and Print Options Attachment print options - Print W-2 and 1099 when e-filing - not suppressed
Form W2-G: Certain Gambling Winnings (printed only for e-filed return)	Organizer Source Docs W2-G input for W2-G AND Organizer E-file Enable/Create - Federal E-file enabled AND Organizer General Info Return and Print Options Attachment print options - Print W-2 and 1099 when e-filing - not suppressed

Form W-7 (COA): Certificate of Accuracy for IRS Individual Taxpayer Identification Number	Form W-7 (COA) is subordinate to an individual Form W-7. It will print along with the parent W-7 when there are any checkboxes in the section Supporting Documentation checked. Entry for these fields can be found at Organizer, Informational Forms, Application for IRS ITIN, for each application. Organizer, General Information, Return and Print Options, Tax Form Options (contd) tab. See the W-7 Application for IRS ITIN box. There are also print controls in Organizer, Informational Forms, Application for IRS ITIN, for each application.
Form W-7: Application for IRS Individual Taxpayer Identification Number	Form W-7 will print when a W-7 exists in the return and print is not suppressed. The form exists when an application id exists. Navigate to Organizer, Informational Forms, Application for IRS ITIN. The form will print with as much or as little as is entered by the user. The forms can be printed either with the return, or independently from the return. There can be multiple Forms W-7 printed in a return. Print controls exist at: Organizer, General Information, Return and Print Options, Tax Form Options (contd) tab. See the W-7 Application for IRS ITIN box. There are also print controls in Organizer, Informational Forms, Application for IRS ITIN, for each application.
RPD-41406	
Schedule 1 - Additional Income and Adjustments to Income	Schedule 1 will print when there is an amount on line 10 (additional income), or there is an amount on line 26 (total adjustments). It will also print if the "Force print Schedules 1-3 even if no data is present: checkbox is checked on Organizer General Information Return and Processing Options Tax Form Options Form 1040 options.
Schedule 2 - Additional Taxes	Schedule 2 will print when there is an amount on line 3 or on line 21. It will also print if the "Force print Schedules 1-3 even if no data is present:" checkbox is checked on Organizer General Information Return and Processing Options Tax Form Options Form 1040 options.
Schedule 3 - Additional Credits and Payments	Schedule 3 will print when there is an amount on line 8 (refundable credits) or on line 15 (refundable credits) . It will also print if the "Force print Schedules 1-3 even if no data is present" checkbox is checked on Organizer General Information Return and Processing Options Tax Form Options Form 1040 options.
Schedule 8812: Child Tax Credit	Organizer Credits Additional Child Tax Credit Input Dependent(s) to generate an amount on line 15 AND No Form 2555 in the return if ITIN
Schedule A: Itemized Deductions	This form is affected by the Tax Cuts & Jobs Act (TCJA). Schedule A will print when Form 1040 page 2, line 12 contains the taxpayers itemized deductions from Schedule A line 17. Navigate to Tax Forms, 1040 – Income Tax Return, Page 2 tab. Click line 8 to see the Itemized Deductions or Standard Deduction yellow screen and the Optimization Election box. The system will optimize and cause the greater of the standard deduction or the Schedule A line 17 itemized deduction to flow to line 8. The standard or itemized deduction can be forced. The presence of Section 933 excluded income will cause the amount of itemized deductions to flow from Tax Forms, Sch A – Itemized Deductions, Schedule A – Section 933 tab.

Schedule B: Interest and Dividend Income	Schedule B will print if any of the following applies: 1) If either taxable interest (line 4) or ordinary dividends (line 6) is greater than \$1,500. 2) Taxpayer is claiming an exclusion of interest from certain US Savings bonds (line 3) 3) Taxpayer received interest or dividends as a nominee, had accrued interest from a bond, had tax-exempt interest income, had an OID adjustment, had amortizable bond premiums, or had accrued market discounts (these items will be detailed on line 1). 4) Taxpayer had interest in foreign financial accounts or trusts (line 7a or line 8 is Yes). See Organizer, General Information, Return and Print Options, Tax Form Options tab for Schedule B input regarding financial accounts and trusts. Also, the presence of FinCEN 114 in the return will also cause line 7 to populate indicating the taxpayer had foreign financial interests.
Schedule C: Profit or Loss From Business	This will print when there is an amount on Schedule C, Line 31. This amount represents Net profit or (loss).
Schedule D (AMT): Recomputed Capital Gains and Losses for AMT	Schedule D (AMT) will print when there is an amount on line 7 (there are Net short-term capital gains or losses reported), or an amount on line 15 (there are Net long-term capital gains or losses reported). When the return has qualified dividends (Form 1040 page 2 line 3a), Schedule D will print with the Qualified Dividend and Capital Gain Tax worksheet when requested. Navigate to Organizer, General Information, Return and Print Options, Tax Form Options. See Schedule D – Capital Gains and Losses box.
Schedule D: Capital Gains and Losses	Schedule D will print when there is an amount on line 7 (there are Net short-term capital gains or losses reported), or an amount on line 15 (there are Net long-term capital gains or losses reported). When the return has qualified dividends (Form 1040 page 2 line 3a), Schedule D will print with the Qualified Dividend and Capital Gain Tax worksheet when requested. Navigate to Organizer, General Information, Return and Print Options, Tax Form Options. See Schedule D – Capital Gains and Losses box.
Schedule D: Carryover Worksheet	Capital Loss Carryforwards are printed as Statement Detail associated with Schedule D.
Schedule E: Supplemental Income and Loss	Tax Form View Federal Sch E - Supplement Income and Loss Amount on any of the following lines 23 through 26, 32, 37, 39, 40, 42, 43 + Organizer General Information return and Print Options Tax Form Options (TAB) Schedule E - Supplemental Income and Loss Suppress Options (SELECT) None Selected
Schedule EIC: Earned Income Credit	For Schedule EIC to print, both of the following conditions must be met: (1) Data must be present on line 6 of Worksheet A or line 11 of Worksheet B (2) At least one qualifying child must be present. If the conditions are not met, you can force Schedule EIC to print on Organizer Credits Earned Income Credit General Information.
Schedule F: Profit or Loss From Farming	Organizer Income Farm Income Farm Name (EXISTS) + Tax Form View Federal Sch F - Profit or Loss From Farming Line 34 Net farm profit or (loss) (POPULATED)
Schedule H: Household Employment Taxes	Organizer Taxes Household Employment Tax Employer Id Number (EXISTS)

Schedule J: Income Averaging for Farmers and Fishermen	Organizer Income Farm Income Sch. J - Farm income Averaging Schedule J Information Elected Farm Income (Mandatory) (EXISTS) + Tax Form View Federal Sch J - Farm Income Averaging Line 23 is less than the regular tax OR Organizer Income Farm Income Sch. J - Farm income Averaging Schedule J Information (SELECT) Force Schedule J to Print
Schedule LEP: Request for Change in Language Preference	
Schedule R: Credit for the Elderly or the Disabled	This will print when there is an amount on Schedule R, Line 22 greater than NONE OR Organizer General Information Return and Print Options Tax Form Options (contd) (TAB) Schedule R - Credit for the Elderly (SELECT) Force Schedule R to print
Schedule SE: Self-Employment Tax	This form will print if the following conditions are met: Short Schedule SE (Taxpayer or Spouse): 1. Short Schedule SE, Line 4 is greater than \$400 2. Short Schedule SE Line 5 (Self-employment tax) is greater than zero. Long Schedule SE (Taxpayer or Spouse): 1. Long Schedule SE, Line 4c is greater than \$400 2. Long Schedule SE Line 12 (Self-employment tax) is greater than zero. It is also possible to force print form Schedule SE. Navigate to Organizer Taxes SE Information Print Options
Section 199A (QBI) Unadjusted Basis for 2.5% Limitation	QBI is not disabled for the 1065 return, qualifying assets exist, and the option to print this form is selected on the Depreciation Compute and Print Options Organizer

Alabama

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
ALForm2106	
ALForm2106EZ	
ALForm4684	
ALScheduleC	
ALScheduleCEZ	
ALScheduleF	
Form 40	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status is resident/part-year resident.
Form 40NR	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status is nonresident.
Form 40V	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is an Amount Due on Form 40-V.
Form 4952A	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + An amount must be present on line 5 or line 6.

Form AL-8453	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + E-file has been enabled.
Form EOO	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + The "Print opt out form" checkbox has been selected in Organizer States Alabama E-file Additional Information. + A residency status has been selected.
Form NOL-85	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + An amount must be present on line 7 of Part II.
Form NOL-85A	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments.
Sch ATP	
Sch40 HBC	
SchCP	
Schedule A, B, D & E (NR)	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + The residency status is nonresident. + For Schedule A, the checkbox for "Itemized Deductions" must be selected in Tax Forms States Alabama 40NR - Income Tax Return Page 1, line 13. + For Schedule B, there needs to be an amount in Tax Forms States Alabama Schs A, B, D and E Page 2 Schedule B, line 4, column B. + For Schedule D, there needs to be an amount in Tax Forms States Alabama Schs A, B, D and E Page 2 Schedule D, line 5, column B or column C. + For Schedule E, there needs to be an amount in Tax Forms States Alabama Schs A, B, D and E Page 2 Schedule E, Part I, line 5, column B or column C, or Part II, line 7, column B or column C.
Schedule A, B, DC	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + The residency status is resident or part-year resident. + For Schedule A, the checkbox for "Itemized Deductions" must be selected in Tax Forms States Alabama 40 - Income Tax Return Page 1, line 11, or there needs to be an amount on Schedule A, line 27. + For Schedule B, there must be an amount in Tax Forms States Alabama Schs A, B, and DC (40) Page 2 Schedule B, line 3. + For Schedule DC, there must be an amount in Tax Forms States Alabama 40 - Income Tax Return Page 1, line 34.
Schedule AAC	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is an amount on line 5 or 6 in Tax Forms States Alabama Sch AAC - Adoption tax Credit Part II.
Schedule AATC	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is an amount on Page 1, Part 1, line 39. OR + There is an amount on Page 2, Part II, line 7. OR + There is an amount entered on any of the lines on Page 2, Part III.
Schedule AJA	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is an amount on line 18 of Part II.

Schedule ARA	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is an amount on Page 1, Part II, line 18. OR + There is an amount on Page 2, Part IV, line 18.
Schedule CR	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + Column 1 needs to be marked with an X in Organizer States Alabama Credits General Credits Credit for Taxes Paid to Other State(s). + There needs to be an amount in columns 2 and 3 in Organizer States Alabama Credits General Credits Credit for Taxes Paid to Other State(s).
Schedule D & E	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status is resident. + For Schedule D, there is an amount on line 1 in Tax Forms States Alabama Resident/Part-year Resident Schs D and E (40) Page 1. OR + For Schedule E, there is an amount on line 25 in Tax Forms States Alabama Resident/Part-year Resident Schs D and E (40) Page 2.
Schedule DEC	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There needs to be an amount on Schedule DEC, Part I, line 6. OR + There needs to be an amount on Schedule DEC, Part II, line 19.
Schedule DS	
Schedule HOF	
Schedule HTC	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There needs to be an amount in Schedule HTC, Part I, line 2. OR + There needs to be an amount in Schedule HTC, Part I, line 3. OR + There needs to be a project number in Schedule HTC, Part I, line 1a.
Schedule KRCC-I	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There needs to be an amount in Schedule KRCC-I, Part 3, line 5
Schedule NTC	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is an amount on Schedule NTC, line 29. OR + There is an amount on one or more of the following lines on Schedule NTC: 2, 4, 6, 8, 10, 12, 14, 16, 18, 20, 22, 24, 26, or 28c.
Schedule OC	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is an amount on Schedule OC, Page 2, Part K, line 1.
Schedule RC	
Schedule RS	
Schedule W-2	Options 3 or 5 are selected in Organizer Payments and Extensions Extensions State Options and Payments. + Residency status has been selected. + There is total wages and withholdings. OR + There are federal wages. OR + There are Alabama wages. OR + There are other state wages.

WorksheetFedIncomeTaxDeduct

Alaska

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

Form 07-1466

Organizer | States | Add States/Cities | Alaska Resident selected + Tax Forms | States | Alaska | 07-1466 - Refund Application | Taxpayer (TAB) | Employee Contribution Deducted Total needs an amount or Tax Forms | States | Alaska | 07-1466 - Refund Application | Spouse (TAB) | Employee Contribution Deducted Total needs an amount

Arizona

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

Form 131

Arizona is not suppressed + Residency status has been selected + Organizer | States | Arizona | Extension Information | Extension Option other than 1 or 2 has been selected + Organizer | States | Arizona | Amended Return | Option 1 is NOT selected + Date of Death has been selected here Tax Forms | States | Arizona | Nonresident | 131 - Deceased Taxpayer Refund Claim | 2 Date of Death + Person Claiming the Refund selected here Organizer | States | Arizona | Deceased Refund | Person Claiming the Refund

Form 140

Arizona is not suppressed + Residency status has been selected + Organizer | States | Arizona | Extension Information | Extension Option other than 1 or 2 has been selected + Organizer | States | Arizona | Amended Return | Option 1 is NOT selected + Resident Return

Form 140 PTC

Arizona is not suppressed + Residency status has been selected + Organizer | States | Arizona | Extension Information | Extension Option other than 1 or 2 has been selected + Resident Return + Line 56 includes data found here Tax Forms | States | Arizona | Resident | 140 - Income Tax Return | Page 2 | Line 56

Form 140 -SBI

Form 140ES

Arizona is not suppressed + Residency status has been selected + Organizer | States | Arizona | Extension Information | Extension Option other than 1 or 2 has been selected + Organizer | States | Arizona | Amended Return | Option 1 is NOT selected + (Estimate is Required OR Organizer | States | Common State | Estimates | Arizona is selected) + Organizer | States | Arizona | Estimated Tax | Estimate Option | "Estimate equal to current year overpayment" is NOT selected.

Form 140ES-SBI

Form 140NR

Arizona is not suppressed + Residency status has been selected + Organizer | States | Arizona | Extension Information | Extension Option other than 1 or 2 has been selected + Organizer | States | Arizona | Amended Return | Option 1 is NOT selected + Nonresident Return

Form 140NR-SBI

Form 140PY	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Part-year Return
Form 140PY-SBI	
Form 140V	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + (AZ efile is selected OR AZ Extension efile is selected) + (Tax Forms States Arizona 8879 - E-file Signature Line 5 "Amount you Owe" has data OR Tax Forms States Arizona 204 - Extension Application Line 7 has data
Form 140V-SBI	
Form 140X	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Print Option is selected here Organizer States Arizona Amended Return Print Options
Form 140X-SBI	
Form 203	
Form 204	Arizona is not suppressed + Residency status has been selected + (Organizer Payment and Extensions State Options and Payments Arizona has an option selected OR (Tax Forms Arizona 204 - Extension Application " A federal extension will be used to file this return..." has been selected + Organizer Payment and Extensions State Options and Payments Arizona has an option selected) + Efile Extension Application not selected
Form 204-SBI	
Form 221	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + (Organizer States Arizona Penalties and Interest Penalties and Interest Option to Compute and Print Underpayment Penalty 2 or 3 has been selected OR (Organizer States Arizona Penalties and Interest Penalties and Interest "Bypass prescribed threshold + Tax Forms States Arizona Resident 140 - Income Tax Return Page 2 Line 75 has data))
Form 221-SBI	
Form 301	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Tax Forms States Arizona Resident 301 - Credits Page 2 Line 76 has data
Form 301-SBI	

Form 309	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Tax Forms States Arizona Resident 301 - Credits Page 1 Line 6- Current Year has data
Form 309-SBI	
Form 310	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + (Tax Forms States Arizona Resident 310 - Solar Energy Devices Credit Line 18 has data OR Organizer States Arizona Return Options Force Form 310 to print)
Form 312	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Tax Forms States Arizona Resident 312 - Agricultural Water Conservation Page 2 Line 19 - Current Year has data
Form 321	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + (Tax Forms States Arizona Resident 321 - Charitable Organizations Page 2 Line 20 has data OR Organizer States Arizona Return Options Force Form 321 to print)
Form 322	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + (Tax Forms States Arizona Resident 322 - Fees Paid to Public Schools Page 2 Line 22 has data OR Organizer States Arizona Return Options Force Form 322 to print)
Form 323	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + (Tax Forms States Arizona Resident 323 - Fees Paid to Private Schools Page 2 Line 22 has data OR Organizer States Arizona Return Options Force Form 322 to print)
Form 340	
Form 348	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Tax Forms States Arizona Resident 348 - Tuition Organization Page 2 Line 23 has data + Tax Forms States Arizona Resident 348 - Tuition Organization Page 2 Line 14 has data

Form 352	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Tax Forms States Arizona Resident 352 - Foster Organization Page 2 Line 22 has data
Form 355	
Form AZ-8879	+ Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + AZ efile is selected + No Efile Extension Exists
Form AZ-8879 SBI	
Schedule A	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Resident Return + Line 43 has "Itemized" selected - found here Tax Forms States Arizona Resident 140 - Income Tax Return Page 2 Line 43
Schedule A (PY)	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Part-year Return + Line 55 has "Itemized" selected - found here Tax Forms States Arizona Part-year Resident 140 - Income Tax Return Page 2 Line 55 + Part-year/Nonresident information checkbox is NOT selected here: Organizer States Arizona General Information "Part-year resident..."
Schedule A (PYN)	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Part-year Return + Line 55 has "Itemized" selected - found here Tax Forms States Arizona Part-year Resident 140 - Income Tax Return Page 2 Line 55 + Part-year/Nonresident information checkbox IS selected here: Organizer States Arizona General Information "Part-year resident..."
Schedule A(NR)	Arizona is not suppressed + Residency status has been selected + Organizer States Arizona Extension Information Extension Option other than 1 or 2 has been selected + Organizer States Arizona Amended Return Option 1 is NOT selected + Nonresident Return + Line 53 has "Itemized" selected - found here Tax Forms States Arizona Nonresident 140 - Income Tax Return Page 2 Line 53

StateClaimofRightIND

Arkansas

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form AR EST	Form AR1000ES is E-filed and direct withdraw is selected
Form AR EXT	Form AR4686 is E-filed and direct withdraw is selected

Form AR1000	Organizer States Add States/Cities Arkansas Resident selected + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected
Form AR1000ADJ	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR1000ADJ - Adjustment Schedule If either line 18 Column A, B, or C is populating an amount
Form AR1000CE	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR1000CE Line 7 is populating (Column A, B, or C)
Form AR1000-CO	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR1000-CO - Check-Off Contributions Any of the Total refund lines 1-8 has an amount
Form AR1000D	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Tax Forms States Arkansas Resident AR1000D - Capital Gain Schedule Line 12 is populating (Column A, B, or C)
Form AR1000DC	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer States Arkansas Credits Phenylketonuria Disorder and Other Metabolic Disorders Credit An entry exists + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected
Form AR1000EC	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer Credits Child and Dependent Care Credit Care Provider Add in at least one care provider name + Tax Forms States Arkansas Resident AR1000EC - Early Childhood Cert (Name) line 6 OR line 9 needs an amount
Form AR1000ES	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer States Arkansas Estimated Tax Estimate Option Suppress Compute and Print is NOT selected + Organizer States Arkansas Estimated Tax Estimate Option Suppress Estimate equal to current year overpayment is NOT selected + Organizer States Arkansas Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is NOT selected OR [Organizer States Arkansas Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is Selected AND Tax Forms States Arkansas Resident AR1000ES - Estimated Tax Worksheet and Voucher 1 - 4 Line 8 is greater than threshold] + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Common State Estimates Arkansas Option 4 and 6 is NOT selected
Form AR1000NR	Organizer States Add States/Cities Arkansas Non-Resident or Part-Year selected + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected

Form AR1000-OD	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR1000-OD - Organ Donor - Taxpayer Line 7 is populating Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR1000-OD - Organ Donor - Spouse Line 7 is populating
Form AR1000TC	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Part-year Resident/Nonresident AR1000TC - Tax Credits line 6
Form AR1000TD	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer Income Lump Sum Distributions Taxpayer (or Spouse) Method and Questions Qualifying Questions to Use Form 4972 If all Questions are answered correctly AND [Organizer States Arkansas Lump-Sum Distribution Taxpayer (or Spouse) Overrides Tax on Lump-Sum Distributions Override exists OR Tax Forms States Arkansas Part-year Resident/Nonresident AR1000TD - Lump-Sum Distribution Taxpayer (or Spouse) line 18 exists]
Form AR1000V	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer E-file Enable/Create Column B Arkansas is enabled + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Tax Forms States Arkansas Resident AR1000V - Payment Voucher Amount Paid exists
Form AR1055-IT (Extension Form)	Organizer Payments and Extensions Extensions State Options and Payments Option 1 or 3 is selected
Form AR1075	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR1075 - Tuition Deduction - Taxpayer (or Spouse) Line 5 exists OR Tax Forms States Arkansas Resident AR1075 - Tuition Deduction - Dependents (name) Line 5 exists + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected
Form AR1113	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer States Arkansas Credits Phenylketonuria Disorder and Other Metabolic Disorders Credit First name, Last name, SSN, and Column 1/2 has input + Tax Forms States Arkansas Resident AR1113 - Phenylketonuria Disorder Cr (Name) Page 1 Line 7 exists
Form AR2106	

Form AR2210	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer States Arkansas Penalties and Interest Penalties and Interest tab Option to Compute and Print Underpayment Penalty option 4 is NOT SELECTED + Organizer States Arkansas Penalties and Interest Annualization tab No inputs entered on this screen + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected + Organizer States Arkansas Penalties and Interest Penalties and Interest tab Option to Compute and Print Underpayment Penalty option 2 or 3 is selected OR [Organizer States Arkansas Penalties and Interest Penalties and Interest tab Option to Compute and Print Underpayment Penalty option 1 is selected AND Tax Forms States Arkansas Resident AR2210 - Underpayment Penalty Line 18 exists]
Form AR2210A	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer States Arkansas Penalties and Interest Annualization tab Inputs EXIST on this screen + Organizer States Arkansas Penalties and Interest Penalties and Interest tab Option to Compute and Print Underpayment Penalty option 4 is NOT SELECTED + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected + Organizer States Arkansas Penalties and Interest Penalties and Interest tab Option to Compute and Print Underpayment Penalty option 1, 2, or 3 is selected AND Tax Forms States Arkansas Resident AR2210A - Annualized Income Page 2 line 46 exists
Form AR3 (Item Ded. Sch.)	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR3 - Itemized Deductions line 29 populated + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected
Form AR3903	
Form AR4 (Int. & Div. Sch.)	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR4 - Interest and Dividend Either Part I total, Part II total, or Part III total is populated + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected
Form AR4684	
Form AR8453	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer E-file Enable/Create Column B Arkansas is enabled + Organizer Payments and Extensions Extensions State Options and Payments Arkansas Option 1 is NOT selected + Organizer States Arkansas Amended Return Amended Return Amended is NOT selected
Form AR-MS	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Organizer General Information Basic Return Information Taxpayer Information Armed Forces Taxpayer must be in armed forces as well as have a spouse

Form AR-OI	Organizer States Add States/Cities Arkansas Resident, part-year, non-resident selected + Tax Forms States Arkansas Resident AR-OI Other Income/Loss If any of the listed is populating: Column A line 7 or line 15 Column B line 7 or line 15 Column C line 7 or line 15
SchARK1	
Schedule AR1000CE	
Schedule AR1000NOL	
Schedule AR1099PT	
Schedule AR2441	
Schedule ARHealth	
Schedule ARMS	
Schedule ARRET	1040 DOES NOT PRINT. DOES NOT EXIST WITHIN TAX FORMS
Schedule ARStudent	
Schedule ARTCQI	
Schedule Inflationary Relief Credit	

California

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 2106	If a federal Form 2106 is generated
Form 3503	1. If there is an amount for Total current year natural heritage preservation credit on Form 3503 OR 2. If force printed in Organizer, States, California, Return Options, Print Options either for All credit forms or for Form 3503 OR 3. If there is an amount for Credit carryover for future years on Form 3503 OR 4. If there is an amount for Credit claimed on Form 3503
Form 3504	1. If T or S selected in Organizer, States, Californis, Enrolled Tribal Member AND 2. If exempt income exists
Form 3506	1. If force printed in Organizer, States, California, Return Options, Print Options either for All credit forms OR 2. If there is an amount for Child and Dependent Care Expenses Credit on Form 3506 line 12
Form 3510	1. If there is an amount for AMT credit carryover on Form 3510 OR 2. If amount for Prior year AMT credit is greater than NONE OR 3. If force printed in Organizer, States, California, Return Options, Print Options either for All credit forms or for Form 3510
Form 3514	1. If there is an amount for California EITC on Form 3514
Form 3519	(1. If Batch Extension is selected OR 2. If Extension option is selected under Organizer, Payments and Extensions, Extensions, State Options and Payments tab) AND 3. There is an amount paid on Form 3519 greater than NONE

Form 3523	1. If there is an amount for Total available research credit OR 2. If force printed in Organizer, States, California, Return Options, Print Options either for All credit forms or for Form 3523
Form 3526	1. If amount for Investment interest expense deduction for regular and AMT are not equal OR 2. There is an amount for California investment interest expense deduction adjustment OR 3. Federal Form 4952 is force printed
Form 3531	1. If there is an amount for Total available California Competes Tax Credit
Form 3532	1. If Head of Household filing status on Form 540 or on Form 540NR
Form 3533	1. If option selected for "Prior return was joint return; now establishing a residence separate from spouse" under Organizer, States, California, General Information, Change of Address OR 2. Any of the prior names or addresses entered for taxpayer or spouse under Organizer, States, California, General Information, Change of Address, Prior Information
Form 3541	1. If Original California Motion Picture and Television Production Credit or New California Motion Picture and Television Production Credit is checked AND there are credit amounts claimed OR 2. There is an amount for Credit carryovers from prior year
Form 3548	1. If there is an amount for Total available disabled access credit OR 2. If force printed in Organizer, States, California, Return Options, Print Options either for All credit forms or for Form 3548
Form 3554	1. If there is an amount for Credit claimed or Credit carryover for future years or Credit recapture OR 2. If force printed in Organizer, States, California, Return Options, Print Options for Form 3554
Form 3582	1. If California e-file is enabled in Organizer, E-file, Enable/Create AND If Extension only not selected in Organizer, Payments and Extensions, State Options and Payments AND If there is an amount of payment on Form 3582 AND Direct debit is not selected for California in Organizer, States, Common State, Bank Information) OR 2. If force printed in Organizer, States, California, Return Options, Print Options for Form 3582
Form 3582X	1. If California e-file is enabled in Organizer, E-file, Enable/Create AND If there is an amount of payment on Form 3582X AND Direct debit is not selected for California in Organizer, States, Common State, Bank Information) OR 2. If force printed in Organizer, States, California, Return Options, Print Options for Form 3582X
Form 3592	1. If there is an amount for Total available College Access Tax Credit
Form 3596	1. If there is an amount for Earned Income Tax Credit on Form 540 or Form 540NR AND 2. There is a preparer name on Form 3596
Form 3800	1. If Child's investment income is greater than amount specified to not file Form 3800
Form 3801	1. If there is an amount for the Total in Part I OR 2. If forced printed and not suppressed in Organizer, States, California, Return Options, Print Options for Form 3801
Form 3801-CR	This form will print if Line 5 is greater than NONE.

Form 3803	1. If there is an amount in Part I after the base amount is subtracted from the child's income for taxable interest, ordinary dividends, and capital gain distributions OR 2. If there is an amount for Tax in Part II OR 3. If force printed in Organizer, States, California, Return Options, Print Options for Form 3803
Form 3804-CR	This form will print if there is an amount on Line 3.
Form 3805E	1. If there is an amount for installment sale income or related party installment sale income
Form 3805P	1. If there is an amount for Tax due on Form 3805P from Part I, Part II, or Part III
Form 3805V	1. If there is an amount for NOL and disaster loss carryover OR 2. If there is an amount for Current year NOL OR 3. If force printed in Organizer, States, California, Return Options, Print Options for Form 3805V
Form 3805Z	1. If an Enterprise Zone Business is entered under Organizer, States, California, Credits, Enterprize Zone Hiring and Sales or Use AND 2. There is a credit amount in Part I, Part II, or Part III AND 3. Not suppressed under Organizer, States, California, Credits, Enterprize Zone Hiring and Sales or Use, Print Options
Form 3809	1. If there is any amount for Credits, Portion of business attributable to the targeted tax area, Net operating loss carryover and deduction on Form 3809, or Recapture of credits AND 2. Not suppressed under Organizer, States, California, Credits, Targeted Tax Area Hiring Credit, Print Options
Form 3820	
Form 3821	
Form 3831	
Form 3835	
Form 3840	1. If option selected for Exchanging California property and acquiring out-of-state like kind property either under Organizer, Gains and Losses, Like-Kind Exchanges, (description of property), California FTB 3940 or under Organizer, Income, (activity type), (property name), Gains and Losses, Like-Kind Exchanges, California Form 3840
Form 3870	
Form 3872	
Form 3885A	1. If option to carry federal depreciation to all states not selected under Organizer, General Information, Return and Print Options, Depreciation Options tab AND 2. There is no override for California Subtractions or Additions for Depreciation/amortization for Schedules C, E, or F under Organizer, States, California, Adjutments to Federal Amounts AND 4. There is an amount for California depreciation/amortization AND 5. An activity is not marked as Resident state exempt under Organizer, Income, (activity), (property name), (activity information), State Information, State Specific Allocations
Form 3913	If moving expenses entered in federal organizer and not military
Form 4684	If personal property casualty or loss entered on federal organizer

Form 540	If the taxpayer is marked as a resident of California under Organizer, States, Add States/Cities
Form 540-ES	1. If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab AND 2. Estimates are not suppressed under Organizer, States, California, Estimated Tax AND 3. Option for Estimate equal to current year overpayment not selected on Organizer, States, California, Estimated Tax AND 4. If Total of Balance to pay for vouchers 1-4 is greater than NONE OR Estimate Option for alphabetic only selected on Organizer, States, California, Estimated Tax
Form 540NR	If the taxpayer is marked as either a nonresident or part-year resident of California under Organizer, States, Add States/Cities
Form 5805	1. If penalty computation is not suppressed under Organizer, States, California, Penalties and Interest AND 2. (Penalty amount computed on Form 5805 OR Penalty option to always print form selected under Organizer, States, California, Penalties and Interest)
Form 5805F	1. If penalty computation is not suppressed under Organizer, States, California, Penalties and Interest AND 2. Farmer or fisherman selected for California under Organizer, States, Common State, Basic Return Information AND 2. Penalty amount computed on Form 5805F
Form 592B	
Form 593	
Form 6198	1. If there is Amount at risk on Form 6198 AND 2. Form 6198 not suppressed under Organizer, States, California, Return Options, Print Suppressions AND 3. There is an amount for Deductible loss on Form 6198
Form 8453	1. If E-file is enabled for California under Organizer, E-file, Enable/Create AND 2. If no Extension Option is selected for Extension Only for California under Organizer, Payments and Extensions, Extensions, State Options and Payments tab AND 3. If PINs not entered under Organizer, E-file, Signature Authorization OR Form 8453 print option selected under Organizer, States, California, Return Options, Print Options OR PINs are entered by Taxpayer under Organizer, E-file, Signature Authorization
Form 8453PMT	For Extensions: 1. If Batch Extension is selected for alphanumeric OR If Extension option is selected under Organizer, Payments and Extensions, Extensions, State Options and Payments tab AND 2. If E-file is enabled for California extensions under Organizer, E-file, Enable/Create, Extensions tab AND 3. If Self Select PINs not entered under Organizer, E-file, Signature Authorization OR Form 8453P print option selected under Organizer, States, California, Return Options, Print Options For Estimates: 1. If E-file is enabled for California estimates under Organizer, E-file, Enable/Create, Estimates tab AND 2. If PINs not entered under Organizer, E-file, Signature Authorization OR Form 8453P print option selected under Organizer, States, California, Return Options, Print Options
Form 8454	1. If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab AND 2. If print opt out form is selected under Organizer, States, California, E-file, Additional Information, E-file Opt Out

Form 8455	1. If PINs not entered under Organizer, E-file, Signature Authorization AND 2. If Bank information provided for California under Organizer, States, Common State, Bank Information AND 3. There is an amount owed on Form 8879 OR selected option to direct debit estimates under Organizer, States, Common State, Bank Information, Estimates tab AND 4. If E-file is enabled for California under Organizer, E-file, Enable/Create
Form 8824	1. If exchange is not being reported on the installment method AND 2. If there are amounts for gains on Form 8824 for either short-term capital gain, long-term capital gain, section 1231 gain, or ordinary gain AND 3. If nonresident, option selected to include all Form 8824 from Federal to California under Organizer, States, California, Part-year/Nonresident Allocation, Form 8824 - Like Kind Exchanges
Form 8879	1. If E-file is enabled for California under Organizer, E-file, Enable/Create AND 2. If no Extension Option is selected for Extension Only for California under Organizer, Payments and Extensions, Extensions, State Options and Payments tab AND 3. If PINs entered under Organizer, E-file, Signature Authorization OR Form 8879 print option selected under Organizer, States, California, Return Options, Print Options OR PINs are entered by ERO under Organizer, E-file, Signature Authorization
Form FTB 3461	This form will print if Line 16 has a positive value.
Form FTB 3849	
Form FTB 3853	The form will print if 1) household members are entered on Part I or 2) the box is checked on Part II or 3) an exemption is entered on Part III or 4) a penalty is being calculated on Part IV, Line 1 The form will not print if 1) the suppress option is selected or 2) the full-year health care check is selected or 3) the taxpayer is claimed as a dependent on another return.
Form FTB 3895	
Schedule CA (540)	1. If the taxpayer is marked as a resident of California under Organizer, States, Add States/Cities AND 2. If there are amounts for either Total Subtractions under Section A - Income, Total Additions under Section A - Income, California Itemized Deductions, Total Subtractions under Section B - Adjustments to Income, or Total Additions under Section B - Adjustments to Income OR Sch CA or Sch CA (540NR) print option selected under Organizer, States, California, Return Options, Print Options
Schedule CA (540NR)	1. If the taxpayer is marked as either a nonresident or part-year resident of California under Organizer, States, Add States/Cities AND 2. If there are amounts for either California taxable income on Sch CA-NR, Total Subtractions under Section A - Income, Total Additions under Section A - Income, California Itemized Deductions, OR Sch CA or Sch CA (540NR) print option selected under Organizer, States, California, Return Options, Print Options
Schedule D (540)	1. If there is an amount for Total losses or gains or amounts on line 12 a or b on Schedule D (540) OR 2. If there are properties on Schedule D (540)
Schedule D (540NR)	1. If the taxpayer is marked as either a nonresident or part-year resident of California under Organizer, States, Add States/Cities AND 2. If there is an amount for Total losses or gains or amounts on line 12 a or b on Schedule D (540) OR If there are properties on Schedule D (540)

Schedule D-1	1. If amounts exist for net gain or loss or nonrecaptured prior year Sec. 1231 losses in Part I OR If amounts of gains or losses exist in Part II OR If there is an amount for Total gains for all properties in Part III OR If recapture amounts exist in Part IV AND 2. Schedule D-1 not suppressed under Organizer, States, California, Return Options, Print Suppressions
Schedule G-1	1. If there is any tax on lump-sum distributions
Schedule P (540)	1. If the taxpayer is marked as a resident of California under Organizer, States, Add States/Cities AND 2. If there is an amount for Alternative Minimum Tax OR there are Credits applied OR there is a Credit carryover to next year OR there are adjustments OR If force printed in Organizer, States, California, Return Options, Print Options for Schedule P
Schedule P (540NR)	1. If the taxpayer is marked as either a nonresident or part-year resident of California under Organizer, States, Add States/Cities AND 2. If there is an amount for Alternative Minimum Tax OR there are Credits applied OR there is a Credit carryover to next year OR there are adjustments OR If force printed in Organizer, States, California, Return Options, Print Options for Schedule P
Schedule S	1. If X to compute credit for taxes paid is entered for a state under Organizer, States, California, Credits, General Credits, Credit for Taxes Paid to Other States AND 2. If there is a value for Other states tax credit on Schedule S
Schedule W-2	1. If an Employer is entered on Organizer, Source Documents, W-2 AND 2. If Statutory Employee is not marked on Organizer, Source Documents, W-2
Schedule X	1. If option for amended return selected under Organizer, States, California, Amended Return
Worksheet RDP	1. If Domestic Partnership option selected under Organizer, States, Common State, Basic Return Information

Colorado

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
E-filer Attachment Form	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" + Organizer E-file Enable Colorado checkbox selected to enable e-file
Form 104	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments Colorado options of extension with return or no extension is selected + Organizer States Colorado Amended Amended with return or no amended is selected
Form 104 PN	Organizer States Add States/Cities, Option "PY", or "NR" for Colorado
Form 104AD	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado + Tax Forms States Colorado 104 - Income Tax Return Page tab Line 5
Form 104AMT	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado + Tax Forms States Colorado 104 - Income Tax Return Page 2 tab Line 8
Form 104CH	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado + Tax Forms States Colorado 104 - Income Tax Return Page 3 tab Line 28

Form 104CR	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" + Tax Forms States Colorado 104CR - Existence of refundable/nonrefundable/carryover credit amount
Form 104-EP	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado + Organizer States Colorado Estimated Tax Estimate Option Suppress Compute and Print is NOT selected + Organizer States Colorado Estimated Tax Estimate Option Suppress Estimate equal to current year overpayment is NOT selected + Organizer States Colorado Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is NOT selected OR [Organizer States Colorado Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is Selected OR Batch Estimate is Alpha Only + Organizer Payments and Extensions Extensions State Options and Payments Colorado option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable + Organizer States Common State Estimates Colorado Estimate equal to Currently year overpayment is NOT selected
Form 104US	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado +Tax Forms States Colorado 104US Line 7
Form 104X	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" +Organizer States Colorado Amended Return Mandatory Information selected +Organizer States Colorado Amended Return Print Option selected
Form 204	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado +Organizer States Colorado Penalties and Interest Option "Suppress penalty computation and do not print form" is NOT selected + Organizer States Colorado Penalties and Interest Option "Always print form, but do not add penalty" is selected OR Organizer States Colorado Penalties and Interest Option "Always print form and add penalty" is selected OR Tax form States Colorado 104 – Income Tax Return Page 3 Estimate tax penalty exists
Form CO-0289	
Form CO-0350	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado +Tax Forms States Colorado DR 350 - Home Buyer Subtraction Amount claimed this year
Form CO-0375	
Form CO-104CN	
Form CO-1330	
Form CO-1703	
Form DR 0347	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" +Tax Forms States Colorado DR 0347 – Child Care Expenses Tax Credit Line 9 OR Tax Forms States Colorado DR 0347 – Child Care Expenses Tax Credit Line 11
Form DR 0617	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Colorado +Tax Forms States Colorado DR 0617 - Innovative Motor Vehicle Cr "vehicle" Page 2 tab Line 18

Form DR 0900	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" +Tax Form States Colorado DR 0900 – E-filing Voucher Amount of Payment entered + Organizer States Colorado Return Options "Suppress print for Form DR 0900" NOT selected
Form DR 1316	Organizer States Add States/Cities, Option “R”, “PY”, or “NR” for Colorado +Tax Forms States Colorado 104 AD Subtraction Line 5
Form DR 1366	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" +Tax Form States Colorado DR 1366 - Enterprise Zone Carryforward Page 10 Line 87 OR Tax Form States Colorado DR 1366 - Enterprise Zone Carryforward Page 10 Line 88
Form DR 158-I	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments Colorado option is selected OR Batch Estimate & Extensions is turned on
Form DR 8453	Organizer States Add States/Cities Colorado Option "R", "PY" or "NR" +Organizer E-file Enable Colorado checkbox selected to enable e-file + Organizer Payments and Extensions Extensions State Options and Payments Colorado extension is turned off

FormCO104CN

FormCO104EE

FormCO104TN

FormCO1370

Connecticut

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

Form CT-1040	The following option is selected: Organizer States Add States/Cities Connecticut Option "R" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5
Form CT-1040BA	Organizer States Add States/Cities Connecticut Option "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + Tax Forms States Connecticut Part-year Resident/Nonresident CT-1040BA Schedule A Column (3) Description Line 1st

Form CT-1040ES	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3 or 4 + Not select Option 2 "Suppress compute and print" for Organizer States Common States Estimates Connecticut + Not select "Suppress compute and print" for Organizer States Connecticut Estimated Tax, Estimated Tax block, Estimate Option + Not all tax payers died in current tax year + An Amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident CT - 1040ES - Estimated Tax Worksheet, line 17 if estimated tax is less than threshold + Not check Organizer States Connecticut Estimated Tax, Compute and Print Options block, "Suppress print if estimated tax is less than threshold". Or if no payments are due after applying overpayment + Not check Organizer States Connecticut Estimated Tax, Compute and Print Options block, "Suppress print if no payments are due after applying overpayment"
Form CT-1040EXT	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 1, 2, 3 or 4
Form CT-1040NR/PY	Organizer States Add States/Cities Connecticut Option "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5
Form CT-1040V	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + Organizer E-file Enable/Create Column B + Amount on Tax Forms States Connecticut Resident or Part-Year Resident/Nonresident CT-1040V - E-filing Payment Voucher, Payment amount + Not check Organizer States Common State Bank Information Return tab, Column B "AUTHORIZATION TO DEBIT FUNDS" for Connecticut + Not claiming disaster on CT-1040 or CT- 1040NR/PY
Form CT-1040X	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + Organizer States Connecticut Amended Return Amended Return, Mandatory Information block, Option 1 or 2, and Print Options, Option 1 or 2
Form CT-2210	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3 or 4 + Organizer States Common State Underpayment, State underpayment Penalty Options, Option 1, 2, or 3 for Connecticut or + any option on Tax Forms Staes Connecticut Resident or Part-year Resident/Nonresident CT-2210 - Underpayment Penalty Page 1, Part I
Form CT-2210 Worksheet	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3 or 4 + Organizer States Common State Underpayment, State underpayment Penalty Options, Option 1, 2, or 3 for Connecticut or + any option on Tax Forms Staes Connecticut Resident or Part-year Resident/Nonresident CT-2210 - Underpayment Penalty Page 1, Part I + an amount (not including NONE) on Tax Forms Staes Connecticut Resident or Part-year Resident/Nonresident CT-2210 - Underpayment Penalty Page 2, Part III Line 17 Total

Form CT-6251	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + Organizer States Connecticut Taxes, AMT block, "Force Print CT-6251" or Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3 or 4 + Positive amount on Tax Forms Federal 6251 - Alternative Minimum Tax Page 1, line 35 + Organizer States Add States/Cities Connecticut Option "R" or "PY" or Organizer States Add States/Cities Connecticut Option "NR + amount on Tax Forms States Connecticut Part-year Resident/Nonresident CT-1040NR/PY - Income Tax Return Page 1, line 6
Form OP-424	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + Organizer States Connecticut Business Entity Tax, Business Entity Tax - Form OP-424 block, "Compute Business Entity Tax (Mandatory)
Schedule CT-1040WH	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + More than seven forms W-2, 1099, or Schedule CT K-1
Schedule CT-CharitableContrib	
Schedule CT-CHET	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + An amount on Tax Forms States Connecticut Resident or Part-year Resident/Nonresident CT-CHET line 4
Schedule CT-CreditIncTaxQualJur	
Schedule CT-Dependent	
Schedule CT-IndUseTax	
Schedule CT-IT Credit	Organizer States Add States/Cities Connecticut Option "R", "PY" or "NR + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + An amount on Tax Forms States Connecticut Resident or Part-year Resident/Nonresident CT-IT Credit Page 1, line 11 or An amount on Tax Forms States Connecticut Resident or Part-year Resident/Nonresident CT-IT Credit Page 2, Part II, Column D
Schedule CT-ModFedAGI	
Schedule CT-PE	
Schedule CT-PropTaxCredits	
Schedule CT-SI	Organizer States Add States/Cities Connecticut Option "PY" or "NR + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5

Schedule EITCredit	Organizer States Add States/Cities, Connecticut Option "R + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + Amount on Tax Forms States Connecticut Resident CT - Earned Income Tax Credit Page 2 line 16
Worksheet CT-1040AW	Organizer States Add States/Cities Connecticut Option "PY" or "NR + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5 + Tax Forms States Connecticut Part-year Resident/Nonresident Sch CT-SI - Connecticut Income, Employee Apportionment Worksheet, Item E, G or "Basis, if other than working days or Organizer States Add States/Cities Connecticut Option "PY" + Organizer Payments and Extensions Extensions State Options and Payments, Connecticut, Option 3, 4 or 5

Delaware

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 200-01	The residency status is set to resident. + The option to print the 200-01-X or 200-02-X only is not selected in Organizer States Delaware Amended Return.
Form 200-01-X	The residency status needs to be resident. + The option to "Prepare resident amended return using original or corrected amounts below, if needed" needs to be selected in Organizer States Delaware Amended Return.
Form 200-02	The residency status is set to nonresident or part year resident. + The option to print the 200-01-X or 200-02-X only is not selected in Organizer States Delaware Amended Return.
Form 200-02-X	The residency status needs to be nonresident or part year resident. + The option to "Prepare nonresident/part-year resident amended return using original or corrected amounts below, if needed" needs to be selected in Organizer States Delaware Amended Return. + An option other than "Not Applicable" is selected in the Print Option section in Organizer States Delaware Amended Return.
Form 200-ES	A residency status has been selected. + The amount on line 11 of the Tax Computation Worksheet for Form 200ES is less than the estimated tax threshold AND the option to "Suppress print if estimated tax is less than threshold" is not selected. OR + There is an overridden amount in the Taxpayer column for the first quarter in the Overrides section in Organizer States Delaware Estimated Tax. OR + The amount on line 11 of the Tax Computation Worksheet for Form 200ES is greater than the estimated tax threshold. OR + There is an amount on line 9 of the Tax Computation Worksheet for Form 200ES AND there is not an amount on line 11 AND the "Suppress print if no payments are due after applying overpayment" option is not selected. + The option to "Suppress compute and print" is not selected in the Estimated Tax section in Organizer States Delaware Estimated Tax. + The option "Estimate equal to current year overpayment" is not selected in Organizer States Delaware Estimated Tax Estimated Tax section.
Form 329	A residency status is selected. + There is an amount on lines 1 or 2 of Form 329.
Form 5E	A residency status has been selected. + Either option 1, 2, or 3 must be selected in Organizer Payments and Extensions Extensions State Options and Payments for Delaware.

Form DE-200-V	A residency status is selected. + Either option 3, 4, or 5 needs to be selected in Organizer Payments and Extensions State Options and Payments for Delaware. + E-file needs to be enabled for Delaware. + There needs to be an amount on Form DE 200-V, line 3.
Form DE-8453	A residency status is selected. + Either option 3, 4, or 5 needs to be selected in Organizer Payments and Extensions State Options and Payments for Delaware. + E-file needs to be enabled for Delaware.
Form PIT-NON	
Form PIT-NSA	
Form PIT-RES	
Form PIT-RSA	
Form PIT-UND	A residency status is selected. + Either option 3, 4, or 5 needs to be selected in Organizer Payments and Extensions State Options and Payments for Delaware. + The option to "Suppress penalty computation and do not print form" option is not selected in Organizer States Delaware Penalties and Interest Penalties and Interest tab. + One of the first three options is selected in the Option to Compute and Print Underpayment Penalty section in Organizer States Delaware Penalties and Interest Penalties and Interest tab. + If the first option is selected in Organizer States Delaware Penalties and Interest Penalties and Interest tab, then there needs to be an amount on Form DE2210, Part 1, line E, or Part 2, line L, or Part 5, line 43.
FormPIT-CRS	
FromPIT-STC	
Schedule I	The residency status is selected. + The option to print the 200-01-X or 200-02-X only is not selected in Organizer States Delaware Amended Return. + There is an amount on line 10 of Form 200-01, Page 1, or line 44 on Form 200-02. + There needs to be an X in column 1, and all other applicable data entered in Organizer States Delaware Credit for Tax Paid.
Schedule II	The residency status is set to resident. + The option to print the 200-01-X or 200-02-X only is not selected in Organizer States Delaware Amended Return. + There is an amount on Schedule II, line 16.
Schedule III	The residency status is selected. + The option to print the 200-01-X or 200-02-X only is not selected in Organizer States Delaware Amended Return. + There is an amount on Schedule III, line 17.
Schedule IV	
Schedule V	
District of Columbia	(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 40	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected
Form D-2210	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Organizer States District of Columbia Penalties and Interest Penalties and Interest Option to compute and print underpayment penalty box The first, second, or third option is selected + Tax Forms States D.C. Resident/Part-year Resident D-2210 Line 11 has data
Form D-2440	
Form D-2441	
Form D-40	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected
Form D-40B	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Non-Resident + Organizer States D.C. Nonresident Request for Refund Filing Status (T or S) Nonresident Basic Information Filing Status (Mandatory) either taxpayer or spouse is selected
Form D-40E	Organizer States Common State Held Projects District of Columbia has not been held + D.C. is set to Efile
Form D-40-ES	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Organizer States District of Columbia Estimated Tax Estimate Option "Supress Compute and Print" is not selected + Organizer States District of Columbia Estimated Tax Estimate Option "Estimate equal to current year overpayment" is not selected
Form D-40P	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Tax forms States D.C. D-40P has an Amount of Payment entered + Form D-40P has not been suppressed
Form DC-8379	
Form FR-127	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information An option has been selected (Option 1 or 3 must be selected for the amounts to print on the return)

Form OTRAltFuel	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Tax Forms States District of Columbia Resident/Part-year Resident Alternative Fuel Vehicle Credit Either B5, C5, or D5 has data
Schedule A	NA
Schedule B	NA
Schedule C	NA
Schedule E	NA
Schedule ELC	
Schedule F	NA
Schedule G	NA
Schedule H	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Tax forms States district of Columbia resident/part-year Resident Sch H - Property Tax Credit Line 28 has data
Schedule HSR	
Schedule I	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Tax forms States district of Columbia resident/part-year Resident Sch I - Additions and Subtractions Calculation A Line 8 or Calculation B Line 16 has data
Schedule J	NA
Schedule N	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Tax forms States District of Columbia resident/part-year Resident Sch N - custodial Parent EITC Claim Page 1 "Yes" has been checked for all 8 questions
Schedule S	Organizer States Common State Held Projects District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer States District of Columbia Extension Information The first or second option is NOT selected + Tax forms States district of Columbia resident/part-year Resident Sch S- Information and Dependents Page 1 data has been entered in box "Enter your last name.

Schedule U

Organizer | States | Common State | Held Projects | District of Columbia has not been held + District of Columbia is marked to Resident or Part Year Resident + Organizer | States | District of Columbia | Extension Information | The first or second option is NOT selected + Tax forms | States | district of Columbia | resident/part-year Resident | Sch U - Credits and Contributions | Part 1: A has data on line 8, OR Part 1: B has data on line 1, OR Part 2 has data on line 5 or 6

District of Columbia UBT

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form D-2030P

The D-2030P, which will also no longer be available for use in tax year 2016, Now D-30P Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | The first or second option is NOT selected + Tax Forms | | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | D-30 - Business Franchise Tax Return | Page 2 | Line 45 has data

Form D-30

Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | The first or second option is NOT selected

Form D-30 NOL

Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | The first or second option is NOT selected + Tax Forms | Cities, Counties, Intangibles, Tangible | District of Columbia UBT | Business Name | D-30 NOL | Either Losses Claimed or Losses Remaining has data

Form D-30-ES

Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | The first or second option is NOT selected + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Estimate Option | "Suppress compute and print" is not selected + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Estimate Option | "Estimate equal to current year overpayment" is not selected Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Estimate Option | "Estimate with alphabetic information only" can't be selected for the amount to print

Form FR-128

For tax year 2016, the FR-128 will no longer be available for use, Now FR-127 - Extension Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | Any option is selected

Schedule A

Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | The first or second option is NOT selected

Schedule D

NA - Per Tax Forms: "**Schedule D has been deleted"

Schedule F

Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | The first or second option is NOT selected

Schedule I

Organizer | States | Common State | Held Projects | District of Columbia has not been held + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | General Information | "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer | Citites, Counties, Intangibles, Tabgibles | District of Columbia UBT | Business Name | Extension Information | The first or second option is NOT selected

Schedule J	Organizer States Common State Held Projects District of Columbia has not been held + Organizer Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name General Information "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name Extension Information The first or second option is NOT selected
Schedule UB	Organizer States Common State Held Projects District of Columbia has not been held + Organizer Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name General Information "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name Extension Information The first or second option is NOT selected + Tax Forms Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name Sch UB Line 20 has data
Worksheet - Economic Development Zone Incentive Credit	Organizer States Common State Held Projects District of Columbia has not been held + Organizer Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name General Information "Filing Status on Form D-30 (Mandatory)" has an option selected AND "Business Name (Mandatory)" has data + Organizer Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name Extension Information The first or second option is NOT selected + Tax Forms Citites, Counties, Intangibles, Tabgibles District of Columbia UBT Business Name Economic Development Zone Incentive Cr "Total of Column 4" has data

Florida

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form DR-405 (Tangible)	Organizer States Add States/Cities Florida Tangible Resident selected + Organizer Income Business Income (Entity) + Organizer Cities, Counties, Intangibles, Tangible Florida Tangible Business Listing Tangible # or Organizer Income Farm Income (Entity) + Organizer Cities, Counties, Intangibles, Tangible Florida Tangible Business Listing Tangible # or Organizer Cities, Counties, Intangibles, Tangible Florida Tangible Business Listing (Entity) and Tangible #

Georgia

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 4562	Either extension option is not selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either amended return option is not selected or amended return with complete return print option is selected + Organizer States Georgia Adjustments to Federal Amounts "Suppress depreciation calculation..." is NOT selected OR Organizer States Georgia Return Options Force print of Form 4562 is selected

Form 500	Either extension option is not selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either amended return option is not selected or amended return with complete return print option is selected
Form 500: Schedule 1	
Form 500: Schedule 2	
Form 500: Schedule 3	
Form 500: Schedule 4	
Form 500-ES	Extension option is not alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Estimated tax option is not alpha only (Organizer States Georgia Estimated Tax) + Batch Estimates is not alpha only + Estimated tax due is greater than 0 (Tax Forms States Georgia Residency Form 500-ES, line 15) + Suppress compute and print option for estimated tax is not selected + Suppress print if no payment are due after applying overpayment option is not selected + Taxpayer is not deceased (both taxpayer spouse if MFJ). Force print estimated tax worksheet: The force print of estimated tax worksheet for applicable jurisdictions option is selected (Organizer Common States Estimates)
Form 500EZ	We do not support this form
Form 500-NOL	+ Either extension option is not selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either amended return option is not selected or amended return with complete return print option is selected + Current tax year NOL amount on Form 500-NOL page 2 line 41 + If NOL carryover from prior years exists (Tax Forms States Georgia GA 500 - Income Tax Return Schedule 1, drill down line 11 Georgia Next Operating loss carryover from previous years) + If NOL carryover to new year exists ((Tax Forms States Georgia GA 500 - Income Tax Return Schedule 1, drill down line 11 Georgia Next Operating loss carryover from previous years) + If suppress print of NOL option is not selected (Organizer States Georgia Return Options)
Form 500-UET	Either extension option is not selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either amended return option is not selected or amended return with complete return print option is selected + Line 21 of 500UET worksheet is greater than 0 + Either 1) Suppress computations and printing of Form 500UET option is not selected (Organizer States Georgia Penalties and Interest) or 2) Farmer/Fisherman exclusion applied (Organizer States Common States Basic Return Information - Column I)
Form 500X	An amended return option is selected + An amended return print option is selected
Form 525-TV	Enabled e-file for Georgia return
Form GA-8453	Enabled e-file for Georgia return

Form IND-CR	Either extension option is not selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either amended return option is not selected or amended return with complete return print option is selected IND-CR 201: line 3 or 4 is greater than 0 IND-CR 202: line 3 or 4 is greater than 0 IND-CR 203: line 3 or 4 is greater than 0 IND-CR 204: line 6 is greater than 0 IND-CR 205: line 5 is greater than 0 IND-CR 206: line 6 or 7 is greater than 0 IND-CR 207: line 7 is greater than 0 IND-CR 208: line 3 or 4 is greater than 0 IND-CR 209: line 6 or 7 is greater than 0 IND-CR Summary Schedule Worksheet : a credit is claimed on Form INC-CR 201, 202, 203, 204, 205, 206, 207, 208 or 209.
Form IT-303	Extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either batch extension option is not selected or batch extension option is alpha only. + Either 1) Federal extension, Form 4686 is not selected or 2) the option to print filing instructions for Form IT-303 is selected.
Form IT-560	Extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either batch extension option is not selected or batch extension option is alpha only. + Amount of payment is exist on Form IT-560.
Form ITCONSV	Either extension option is not selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either amended return option is not selected or amended return with complete return print option is selected + Donated property name exist + Either 1) Total credit available on Part B, line 3 is greater than 0 or 2) Remaining credit amount on line 5 is greater than 0.
Form IT-QEE-SS02	We do not support this form
Form IT-QEE-TP2	Either extension option is not selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) amended return option is not selected or 2) amended return with complete return print option is selected + Either 1) amount of tentative credit allowed on Part A line 3 is greater than 0 or 2) amount of allowed credit on part B line 6 is greater than 0.

Hawaii

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form N-1	Tax Forms States Hawaii Part-year Resident/Nonresident N-1 - Estimated Tax - Hawaii adjusted Gross Income expected in next year and estimated taxes
Form N-101A	Go to Tax Forms States Hawaii Part-year Resident/Nonresident N-101A - Extension Application - Enter amount due with extension
Form N-103	Go to Organizer Gains and Losses Sale of Home required entries i.e. Date purchased and sold and data from Organizer States Hawaii Sale of Residence and Resident N-11 Selected or N-15 Selected and Not Suppressed.
Form N-109	Line 10 triggers Form N-109 App of tentative refund/NOL - Go to Organizer States Hawaii Net Operating Loss

Form N-11	If Resident and Auto extension (Form N-101A codes are not A, or B or E)
Form N-139	Go to Organizer Adjustments to Income Moving Expense Standard Miles and Moving Expenses Incurred in Current Year
Form N-15	Nonresident and Part-Year Resident for calendar year - Go to Organizer States Add States/Cities
Form N-158	Entries made in Organizer States Hawaii Investment Interest Expense
Form N-200V	If no e-file and no direct debit and amount of payment is present and a complete return.
Form N-210	If not suppress (Organizer States Hawaii Penalties and Interest Penalties and Interest) and present of State tax liability and Estimated Tax payments (Organizer States Hawaii Payments)
Form N-312	Cost of qualifying property is present (Tax Forms States Hawaii Part-year Resident/Nonresident N-312 - Capital Goods Excise Tax Credit Workpaper: Hawaii - Part I purchases) or Out of State sellers (Tax Forms States Hawaii Part-year Resident/Nonresident N-312 - Capital Goods Excise Tax Credit Workpaper: Hawaii - Part I Purchases) or Recapture Tax Line 12 page 2 Tax Forms States Hawaii Part-year Resident/Nonresident N-312 - Capital Goods Excise Tax Credit and not suppress
Form N-342	IF TYPE A refundable line 45 or If Type B refundable line 46 or nonrefundable line 53. Go to Organizer States Hawaii Credits Renewable Energy Credit - Enter Total cost of the qualified solar energy system amount
Form N-342A	Organizer States Hawaii Credits Renewable Energy Credit - Distribution Share amounts From Another Form N-342A
Form N-342B	if more than 10 dist share units N-342 Renewable Energy Credit - Organizer States Hawaii Credits Renewable Energy Credit
Form N-342C	if more than 10 dist share units N-342 Renewable Energy Credit - Organizer States Hawaii Credits Renewable Energy Credit
Form N-356	
Form N-362	
Form N-615	If there is tax N-615 line 18 (Tax Forms States Hawaii Part-year Resident/Nonresident N-615 - Tax for Children Under Age 14) and not suppress and child is qualified.
Form N-814	Print if form is not suppress and Child's Name, Income and Tax amounts are present. Data is taken from Federal 8814 Tax Forms Federal 8814 - Elec to Report Childs Int/Div
Schedule AMD	Organizer States Hawaii Amended Return
Schedule CR	Organizer States Hawaii Credits General Credits
Schedule D1	Tax Forms States Hawaii Part-year Resident/Nonresident Sch D-1 - Sale of Business Property Page 1 data is taken from Federal 4562 and Tax Forms States Hawaii Part-year Resident/Nonresident Sch D-1 - Sale of Business Property Workpaper: Hawaii - Section 1231 Gain/L

Schedule X	Print if not suppress data on line 12 (Tax Forms States Hawaii Part-year Resident/Nonresident Sch X - Hawaii Residents Credits Page 1) or line 28 (Tax Forms States Hawaii Part-year Resident/Nonresident Sch X - Hawaii Residents Credits Page 2)
Worksheet - Limit on Charitable Contribution	Resident return line 21d Contributions and Federal is not block and Line 35 Charitable Contribution Limitation worksheet is present and form is not suppress.

Idaho

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 39NR	If Idaho is marked as Part Year or Nonresident AND One of the following must be populated, form 39NR Line 5 column or line 26 column B or Section C line 10 or Section D line 7 or Section F line 4 or Section G have more than 4 dependents.
Form 39R	If Idaho is marked as Resident. AND One of the following must be populated, form 39R Section A line 7 or Section B line 23 or Section C line 6 or Section F line 4 or Section G have more than 4 dependents.
Form 40	If Idaho is marked as Resident.
Form 43	if Idaho is marked as Part-year Resident or Nonresident.
Form 44	if Idaho Form 44 Part I line 9 or Part II line 6 is marked.
Form 49	if Idaho Form 49 Part II line 8 is populated
Form 51	Tax Forms States Idaho Part-year Resident/Nonresident 51 - Tax Payment Worksheet Drill down line 2 make a selection
Form 51ES	If Idaho is marked as resident AND Form is not suppressed at Organizer States Idaho Estimated Tax Estimate Option
Form 56	if Idaho is marked as resident AND Tax Forms States Idaho Resident 56 - Net Operating Loss Page 1 Line 1 populated
Form 56A	
Form CG	if Idaho Form CG Line 11 is populated
Form ID-40V	If Idaho E-file is enabled AND Form ID-40V Amount Paid column are populated

Illinois

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form IL-1040	Organizer States Add States/Cities
Form IL-1040-ES	Extension Information - For Form IL-505-I enter option for extension and payment Organizer States Illinois Payments
Form IL-1040-V	No e-file - Amount Due must be present - Resident - No Direct Debit - Not suppress (Organizer States Illinois Return Options)
Form IL-1040-X	Organizer States Illinois Amended Return Amended Return Enter the mandatory options

Form IL-1310	Date of Death (Organizer General Information Basic Return Information Taxpayer Information) and the person claiming the refund (Organizer States Illinois Deceased Refund)
Form IL-2210	Resident, Nonresident, and Part-year. Enter prior year tax Organizer States Illinois Penalties and Interest Penalties and Interest. Print 2210 and option if applicable.
Form IL-4562	Entries on IL-4562 line 4 or Line 10
Form IL-505-I	Form has been approved and extension is requested and amount of payment. Available in batch print.
Form IL-8453	Option to print for be selected (Activate State for e-file) and not meet one of the exclusions
Form IL-8948	Organizer / States / Illinois / E-file / Additional Information / Select the E-file opt out checkbox.
Schedule 1299-C	1299C data is trigger and not suppress - Tax Forms States Illinois Resident IL-1299-C - Subtractions and Credits Page 1 lines 3 or 7
Schedule CR	Line 55 Lesser of line 51 and 51 required.
Schedule F	Resident Part-year and nonresident Total of line 4 and 7 and 8
Schedule G	Total Voluntary Contribution - Tax Forms States Illinois Resident Sch G - Voluntary Charitable Donations
Schedule ICR	Schedule ICR is marked for print. Force print - Organizer States Illinois Return Options
Schedule IL-E/EIC	
Schedule IL-WIT	
Schedule K-1-P	Organizer screen is not available unless there is a corresponding Federal organizer screen present. For example, a Federal K1 for a partnership or S corp must exist before entries for an Illinois Schedule K-1-P must be made.
Schedule K-1-T	Organizer screen is not available unless there is a corresponding Federal organizer screen present. For example, a Federal K1 for a partnership or S-Corp must exist before entries for an Illinois Schedule K-1-T must be made.
Schedule M	Other additions total or Other subtractions total
Schedule NR	Nonresident and none Resident

Indiana

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form CT-40	Organizer States Add States/Cities, Option "R" for Indiana +Tax Forms States Indiana Resident Sch CT-40 – County Tax line 1A/1B exists OR Tax Forms States Indiana Resident IT-40 – Income Tax Line 9 exists
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Form CT-40PNR	Organizer States Add States/Cities, Option "PY", or "NR" for Indiana +Tax Forms States Indiana Resident Sch CT-40 – County Tax line 1A/1B on section A/B exists OR Tax Forms States Indiana IT-40PNR – Income Tax Line 9 exists
Form ES-40	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana + Organizer States Indiana Estimated Tax Estimate Option Suppress Compute and Print is NOT selected + Organizer States Indiana Estimated Tax Estimate Option Suppress Estimate equal to current year overpayment is NOT selected + Organizer States Indiana Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is NOT selected OR [Organizer States Indiana Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is Selected OR Batch Estimate is Alpha Only + Organizer Payments and Extensions Extensions State Options and Payments Indiana option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable
Form IN-EDGE	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana + Tax Forms States Indiana Sch EDGE – Economic Development Credit completed data with amount claimed exists
Form IN-EDGE-R	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana + Tax Forms States Indiana Sch EDGE-R – Economic Retention Credit completed data with amount claimed exists
Form IN-OOC	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana + Tax Forms States Indiana Sch IT-OCC– Other Certified Credit completed data with amount claimed exists
Form IN-OPT	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana + Tax Forms States Indiana IN-OPT – E-filing Opt-Out e-file is not enabled
Form IT-2440	Organizer States Add States/Cities Indiana Option "R", "PY" or "NR" +Tax Forms States Indiana Sch It-2440 Line 6 exists
Form IT-40	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Organizer States Indiana Net Operating Loss Loss year entered
Form IT-40NOL	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Organizer States Indiana Net Operating Loss Loss year entered
Form IT-40PNR	Organizer States Add States/Cities, Option "PY", or "NR" for Indiana +Tax Forms States Indiana Resident Sch CT-40 – County Tax line 1A/1B on section A/B exists OR Tax Forms States Indiana IT-40PNR – Income Tax Line 9 exists
Form IT-40X	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Organizer States Indiana Amended Return Mandatory Information selected +Organizer States Indiana Amended Return Print Option selected
Form IT-8879	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Organizer E-file Enable Indiana checkbox selected to enable e-file + Signature Option in Federal at Organizer E-file Signature Authorization Practitioner or ERO PIN entered
Form IT-9	Organizer States Add States/Cities Indiana Option "R", "PY" or "NR" + Organizer Payments and Extensions Extensions State Options and Payments Indiana option is selected OR Batch Extension is selected

IN-MSID

Post Filing Coupon	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Tax Forms States Indiana Post Filing Coupon An amount is due
Schedule 1	Organizer States Add States/Cities, Option "R" for Indiana +Tax Forms States Indiana Sch 1- Add Backs Line 8 exist
Schedule 2	Organizer States Add States/Cities, Option "R" for Indiana +Tax Forms States Indiana Sch 2- Deductions Line 12 exist
Schedule 3	Organizer States Add States/Cities, Option "R" for Indiana +Tax Forms States Indiana Sch 3 – Exemptions Line 5 exist
Schedule 4	Organizer States Add States/Cities, Option "R" for Indiana + Tax Forms States Indiana Sch 4- Other Taxes Line 4 exist
Schedule 5	Organizer States Add States/Cities, Option "R" for Indiana + Tax Forms States Indiana Sch 5 – Credits Line 9 exist
Schedule 6	Organizer States Add States/Cities, Option "R" for Indiana + Tax Forms States Indiana Sch 6 – Offset Credits Line 8 exist
Schedule 7	Organizer States Add States/Cities, Option "R" for Indiana + Tax Forms States Indiana Resident Schedule 7 Representative information OR Tax Forms States Indiana Resident Schedule 7 Lines 1-6 populated OR Tax Forms States Indiana Resident IN-OPT is completed
Schedule A (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana +Tax Forms States Indiana Sch A – Adjustments Line 21A/21B exists
Schedule B (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana +Tax Forms States Indiana Sch B- Add Backs Line 6 exist
Schedule C (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana +Tax Forms States Indiana Sch C- Deductions Line 12 exist
Schedule CC-40	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Tax Forms States Indiana Sch CC-40 – Indiana College Credit Amount on Part II line 1 exists
Schedule D (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana +Tax Forms States Indiana Sch D – Exemptions Line 7 exist
Schedule E (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana + Tax Forms States Indiana Sch E- Other Taxes Line 4 exist
Schedule F (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana + Tax Forms States Indiana Sch F – Credits Line 9 exist
Schedule G (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana + Tax Forms States Indiana Sch G – Offset Credits Line 8 exist
Schedule H (NR)	Organizer States Add States/Cities, Option "PY" or "NR" for Indiana + Tax Forms States Indiana Schedule H data on form exists
Schedule IN-529	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Tax Forms States Indiana Sch IN-529 Data exists on form and at least one account information is entered

Schedule IN-529R	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Tax Forms States Indiana Sch IN-529R Data exists on form and at least one account information is entered
Schedule IN-DEP	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Tax Forms States Indiana Sch IN-DEP Complete Dependent information exist
Schedule IN-DEPA	
Schedule IN-Donate	
Schedule IN-EIC	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Tax Forms States Indiana Sch IN-EIC Line A-3 exist
Schedule INK-1	Does not print. (E-file Only information)
Schedule INK1-IT41	Does not print. (E-file Only information)
Schedule IN-PropNR	
Schedule IT-2210	Organizer States Add States/Cities Indiana Option "R", "PY" or "NR" +Organizer States Common State Basic Return Information Farmer or Fisherman selected OR Organizer States Indiana Penalties and Interest "Force printing of schedule IT-2210" selected + OR Organizer States Indiana Penalties and Interest "Force printing of schedule IT-2210A" NOT selected OR Tax Forms States Indiana Sch IT-2210 penalty exists + Organizer States Indiana Penalties and Interest Taxpayer was a resident sometime before the 4th quarter.
Schedule IT-2210A	Organizer States Add States/Cities Indiana Option "R", "PY" or "NR" + Organizer States Indiana Penalties and Interest "Force printing of schedule IT-2210A" selected OR Organizer States Indiana Penalties and Interest Annualization tab "Compute tax on current year annualized income using overrides entered below" selected + Organizer States Indiana Penalties and Interest Annualization tab Data entered in overrides
Schedule IT-40QEC	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Indiana +Tax Forms States Indiana Sch IT-40 QEC Deduction Exist
SchIN529ABLE	
SchINNOLMOD	
SchINOCC	

Iowa

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form IA-100A

Organizer | States | Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer | States | Iowa | Amended Return, IA 1040X block + An amount on Organizer | States | Iowa | Capital Gain Deduction | T, S, or J | IA100A, Part II: Details of Property Sold, Line 6. "Iowa capital gain deduction

Form IA-100B	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + An amount on Organizer States Iowa Capital Gain Deduction T, S, or J IA100B, Part II: Details of Property Sold, Line 8. "Iowa capital gain deduction"
Form IA-100C	It should be: Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + An amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA100 - Capital Gain Deduction Capital Gain Deduction T, S, or J IA100C - Non Farm IA 100C Pg 3, Line 4 "Iowa capital gain deduction But it goes to IA-100B"
Form IA-100D	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + An amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA100 - Capital Gain Deduction Capital Gain Deduction T, S, or J IA100D - Timber IA 100D, Line 8 "Iowa capital gain deduction"
Form IA-100E	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + An amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA100 - Capital Gain Deduction Capital Gain Deduction T, S, or J IA100E - Business IA 100E pg 3, Line 4 "Iowa capital gain deduction"
Form IA-100F	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + An amount on Organizer States Iowa Capital Gain Deduction T, S, or J IA100F, Part II: Details of Property Sold, Line 8. "Iowa capital gain deduction"
Form IA-101	
Form IA-1040	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 1040 - Income Tax Return Page 1, Step 2: Filing Status

Form IA-1040 ES	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Not select Option 2 "Suppress compute and print" or Option 5 "Current year amount as adjusted" for Organizer States Common States Estimates Iowa + Not select "Suppress compute and print" for Organizer States Iowa Estimated Tax, Estimated Tax block, Estimate Option + Not all tax payers died in current tax year + An Amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 1040ES - Estimated Tax Worksheet, line 21 if estimated tax is less than threshold + Not check Organizer States Iowa Estimated Tax, Compute and Print Options block, "Suppress print if estimated tax is less than threshold". Or if no payments are due after applying overpayment + Not check Organizer States Iowa Estimated Tax, Compute and Print Options block, "Suppress print if no payments are due after applying overpayment
Form IA-1040V	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 5 for Iowa + A positive amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 1040 - Income Tax Return Page 2, Item 76 "TOTAL AMOUNT DUE + NOT check "AUTHORIZATION TO DEBIT FUNDS" on Organizer States Common State Bank Information Return tab for IOWA
Form IA-1040X	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Option 1 or 2 for Organizer States Iowa Amended Return, Mandatory Information block + Option 1 or 2 for Organizer States Iowa Amended Return, IA 1040X block
Form IA-1040XV	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Option 1 or 2 for Organizer States Iowa Amended Return, Mandatory Information block
Form IA-2106	
Form IA-2210	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Option 2 or 3 for Organizer States Iowa Penalties and Interest Penalties and Interest, Underpayment of Estimated Tax, Taxpayer, Option to Compute and Print Underpayment Penalty, or Option 1 for Organizer States Iowa Penalties and Interest Penalties and Interest, Underpayment of Estimated Tax, Taxpayer/Spouse, Option to Compute and Print Underpayment Penalty + Amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA2210 - Underpayment Penalty Page 1 - Taxpayer or Spouse Line 9 are larger than estimated tax paid and tax withheld; or, an amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA2210 - Underpayment Penalty Page 1 - Taxpayer or Spouse Line 15 + the sum of Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA2210 - Underpayment Penalty Page 1 - Taxpayer and Spouse Line 4 is larger than minimum requirement
Form IA-2210 F	N/A, PRINTS ON M-2210 PAGE 3
Form IA-3903	

Form IA-4136	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 4136 - Motor Fuel Tax Cr. - Taxpayer or Spouse IA 4136 page 2, Line 7
Form IA-4562A	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Check on Iowa on Organizer States Common State State Depreciation/Gains, State and Cities Requiring this Adjustment + An amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 4562A - Depreciation, Part III, Line 5 + NOT check Organizer States Iowa Adjustments to Federal Amounts, IA 4562 - Depreciation Adjustment block, "Suppress Form IA 4562 print"
Form IA-4562B	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 4562B - Depreciation - Taxpayer or Spouse, Column "Tax Period Ending Date", "IA 4562A Adjustment Amount from Part III, Line 5" or "Balance"
Form IA-4684	
Form IA-6251	Organizer States Add States/Cities, Option "R", "PY" or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + NOT check Organizer States Iowa Taxes Minimum Tax, "Suppress AMT computation + A positive amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 6251 - Taxpayer IA 6251 - Taxpayer pg 1, Line 22, pg 2, Line 36; or, check Organizer States Iowa Taxes Minimum Tax, "Force print Taxpayer IA-6251 even if not required" for taxpayer or Married filing joint, and check "Force print Spouse IA-6251 even if not required" for spouse
Form IA-8453	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Organizer E-file Enable/Create, Return tab, Enable Iowa
Form IA-8801	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer States Iowa Amended Return, IA 1040X block + Organizer States Iowa Credits Credit for Prior Year Minimum Tax, "Force print even if no credit exists"; or, a positive amount on Tax Forms States Iowa Resident or Part-year Resident/Nonresident IA 8801 - PY AMT Credit - Taxpayer IA 8801 - Taxpayer, Line 14
Form IA-8824	
Form IA100G	

Form IA100H

Form IA100J

Form IA124

Form IA125

Schedule A Organizer | States | Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer | States | Iowa | Amended Return, IA 1040X block + Tax Forms | States | Iowa | Resident or Part-year Resident/Nonresident | IA 1040 - Income Tax Return | Page 2, Line 37, "Itemized" checked

Schedule B Organizer | States | Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer | States | Iowa | Amended Return, IA 1040X block + Amount on Tax Forms | States | Iowa | Resident or Part-year Resident/Nonresident | IA Sch B - Dividends and Interest, Part I: Interest Income, total Taxable Interest or Part II: Dividend Income, total Taxable Dividends is larger than 1500, or Organizer | States | Iowa | Return Options, Print Options block, "Force print Schedule B

Schedule IA 123 Organizer | States | Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer | States | Iowa | Amended Return, IA 1040X block + An Amount on Tax Forms | States | Iowa | Resident or Part-year Resident/Nonresident | IA 123 - NOL Worksheet | IA 123 Current/First/Second/Third Year | Taxpayer/Joint/Spouse, Line 7

Schedule IA 126 Organizer | States | Add States/Cities, Option "PY" or "NR" for Iowa + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer | States | Iowa | Amended Return, IA 1040X block) + Amounts on Tax Forms | States | Iowa | Part-year Resident/Nonresident | IA 126 - Part-Yr/Nonresident Credit, Line 26 & 33

Schedule IA 130 NA -- Cannot find the fields on tax return

Schedule IA 134 NA -- Cannot find the screens on tax return

Schedule IA 148 Organizer | States | Add States/Cities, Option "R", "PY", or "NR" for Iowa + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3, 4 and 5 for Iowa + NOT select Option 1 for Organizer | States | Iowa | Amended Return, IA 1040X block + Amounts on Tax Forms | States | Iowa | Resident or Part-year Resident/Nonresident | IA 148 - Tax Credits - Taxpayer/Spouse, Part I, II or IV

Kansas

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

Form 200, Local Intangibles There must be an amount on Form 200, line 11, Total Intangibles Income

Form K-40 (Amended) Complete amended return data. Organizer | States | Kansas | Amended Return.

Form K-40 (Regular) Form prints if Kansas return has been activated.

Form K-40ES	There is a payment for any quarter; Option to print alpha information only has been selected.
Form K-40V	Prints only if efile has not been activated; Payment amount field on the form must have data.
Form K-88	E-file is activated for the return; Amount exists on K-88, line 15.
Form K-89	E-file is activated for the return; Amount exists on K-89, line 7.
Form LC	LLC name must be entered.
SchA	
Schedule CR	Refundable or nonrefundable amount must exist on line 28.
Schedule K-210	Penalty amount exists on K-210, line 17; Penalty option 2 or 3 selected; Farmers/fishers exception applies.
Schedule K-47	Amount exists on K-47, line 7.
Schedule S	Amount exists on line A17 or B12 or C5

Kentucky

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 2210-K	For Form 2210-K to print, either: (1) 2210-K page 2 line 23 Penalty must exist, OR (2) one of the exceptions is marked on 2210-K page 1 part 1. Also, the form should not be suppressed at Organizer States Kentucky Penalties and Interest.
Form 40A102 (Extension)	If state form is not released it will not print. Print with Batch extension available. Indicate option to print Kentucky extension - Organizer Payments and Extensions Extensions State Options and Payments tab.
Form 461K	
Form 6198	This form will print when there is an At Risk loss computed for any income activity (a business, rent or royalty, or farm, or from a Schedule K-1 or Schedule K-1 PTP). For organizer entry, navigate to Organizer, Income, then select the activity type and the activity itself. Within each activity is an At Risk path to the source entry screens.
Form 740	Resident is selected
Form 740ES	Form will print when the estimate option selected is not "suppress compute and print" and there is an amount on line 15 of the Form 740ES estimated tax worksheet.
Form 740-NP	Part-year resident or Nonresident is selected
Form 740-NP-R	Nonresident is selected and a reciprocal state of residence is selected at Organizer States Kentucky General Information Part-year/Nonresident Information rectangle.
Form 740-V	Taxpayer is e-filing return, not direct debiting the payment, and amount exists at Tax Forms States Kentucky 740-V - Payment Voucher

Form 8582-K	Taxpayer is resident and amount on line 4 at Tax Forms States Kentucky 8582-K.
Form 8863-K	All Yes in Part I qualifications Tax Forms States Kentucky 8863-K - Education Tax Credit Page 1
Form 8879-K	Print if electronic filing return and if e-file opt out is not selected and Form 8879-K is selected as the signature form option at Organizer E-file Enable/Create Spreadsheet
Form 8948-K	Tax Forms States Kentucky 8948-K - E-filing Opt Out and option is selected on lines 1 through 6
Form EPAY	Organizer States Common State Bank Information Estimates tab. Option needs to be selected to debit funds.
Form PTETCR	
Form PTE-WH	K-1 activity name at Organizer States Kentucky PTE-WH (flows from federal entry) and withholding amount at Tax Forms States Kentucky PTE-WH line 9.
Schedule A	Taxpayer is resident and there is total itemized deductions amount at Tax Forms States Kentucky Sch A line 14.
Schedule A-NP	Taxpayer is part-year resident or nonresident and there is total itemized deductions amount at Tax Forms States Kentucky Sch A line 13.
Schedule INV	All questions are marked Yes on Schedule INV Part I and there is an amount on line 11.
Schedule ITC	Total amounts exist on Schedule ITC Section A or Section B or there is a Family Size Tax Credit being taken on the main form.
Schedule J	Taxpayer is resident and amount on line 22 at Tax Forms States Kentucky Sch J - Farm Income Averaging
Schedule KNOL	Tax Forms States Kentucky Sch KNOL. Amount exists on page 1 line 26 or page 2 part II Section A line 8 or page 2 part II Section B lines 3 or 8.
Schedule KW-2	Tax Forms States Kentucky Sch KW-2 - Tax Withholding. Total Amount on line 18
Schedule M	Taxpayer is resident and amount on line 6 or line 17 at Tax Forms States Kentucky Sch M
Schedule P	Print with total on line 4 at Tax Forms States Kentucky Sch P and Sch P is not suppressed at Organizer States Kentucky Adjustments to Federal Amounts Schedule P tab.
WksA	
WksC	

Kentucky Cities: Fayette County Board of Education, Lexington-Fayette County
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 228	On Organizer Cities, Counties, Intangibles, Tangibles Kentucky LLC Return & Cities KY, Lexington/Fayette General Information, select Compute Form 228 and/or 228-S and select either Lexington/Fayette or Both under the mandatory radio button.
Form 228-EXT	On Organizer Cities, Counties, Intangibles, Tangibles Kentucky LLC Return & Cities KY, Lexington/Fayette General Information, select Compute Form 228 and/or 228-S and select either Lexington/Fayette or Both under the mandatory radio button. + Select an extension option at Organizer Cities, Counties, Intangibles, Tangibles Kentucky LLC Return & Cities KY, Lexington/Fayette Extension Information
Form 228-S	On Organizer Cities, Counties, Intangibles, Tangibles Kentucky LLC Return & Cities KY, Lexington/Fayette General Information, select Compute Form 228 and/or 228-S and select either Fayette County or Both under the mandatory radio button.
Form 228-S Extension	On Organizer Cities, Counties, Intangibles, Tangibles Kentucky LLC Return & Cities KY, Lexington/Fayette General Information, select Compute Form 228 and/or 228-S and select either Fayette County or Both under the mandatory radio button. + Select an extension option at Organizer Cities, Counties, Intangibles, Tangibles Kentucky LLC Return & Cities KY, Lexington/Fayette Extension Information

Kentucky Cities: Kentucky LLC

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 41A72OSL (Extension)	Organizer Cities, Counties, Intangibles, Tangible Kentucky LLC Return and Cities KY LLC Tax Return Kentucky LLC Schedules. Enter an "X" next to the activity name to generate the form. + Select an extension option at Organizer Cities, Counties, Intangibles, Tangible Kentucky LLC Return and Cities KY LLC Tax Return Activity Name Extension Information.
Form 725	Organizer Cities, Counties, Intangibles, Tangible Kentucky LLC Return and Cities KY LLC Tax Return Kentucky LLC Schedules. Enter an "X" next to the activity name to generate the form.
Schedule COGS	Organizer Cities, Counties, Intangibles, Tangible Kentucky LLC Return and Cities KY LLC Tax Return Kentucky LLC Schedules. Enter an "X" next to the activity name to generate the form. + Have an amount on line 8 at Tax Forms Cities, Counties, Intangibles, Tangible Kentucky LLC Return and Cities Kentucky Corporation Tax Return Activity Name Schedule COGS.
Schedule TCS	Organizer Cities, Counties, Intangibles, Tangible Kentucky LLC Return and Cities KY LLC Tax Return Kentucky LLC Schedules. Enter an "X" next to the activity name to generate the form. + Have an amount on Part III line 1 at Tax Forms Cities, Counties, Intangibles, Tangible Kentucky LLC Return and Cities Kentucky Corporation Tax Return Activity Name Schedule TCS.

Kentucky Cities: Kentucky Local Standard

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Form/Schedule	Requirement(s) to Print
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Form OL-S Organizer | Cities, Counties, Intangibles, Tangible | Kentucky LLC Return and Cities | KY Local Standard | Add Kentucky City. Select a city from the drop down list.

Kentucky Cities: Louisville/Jefferson Co. Metro Revenue Commission Occupational
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Form/Schedule

Requirement(s) to Print

Form OL-3 Organizer | Cities, Counties, Intangibles, Tangible | Kentucky LLC Return and Cities | KY, Louisville/Jefferson | General Information. Check the compute Form OL-3 box

Form OL-3E (Extension) Organizer | Cities, Counties, Intangibles, Tangible | Kentucky LLC Return and Cities | KY, Louisville/Jefferson | Extension Information. Select an extension option.

Form OL3EXT

Form OL3STDInd

Form OL-MP

Louisiana

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Form/Schedule

Requirement(s) to Print

Form IT-540 Organizer | States | Add States/Cities | Louisiana | Select "R" for resident

Form IT-540B Organizer | States | Add States/Cities | Louisiana | Select "R" for resident AND Organizer | States | Louisiana | General Information | Check box "Nonresident professional athlete

Form IT540BNRA Organizer | States | Add States/Cities | Louisiana | Select "NR" for nonresident AND Organizer | States | Louisiana | General Information | Check box "Nonresident professional athlete

Form IT-540ES Organizer | Payments and Extensions | Extensions | General Options | Extension Only will suppress estimate form Organizer | General Information | Amended Return | Basic Data 1040X | Step 3 | Only printing the amended return will suppress estimate form

Form IT-540PYM

Form R-210 Organizer | States | Add States/Cities | Louisiana | Select "R - Resident (Organizer | States | Louisiana | Penalties and Interest | Penalties and Interest | Check box "Always print form, but do not add penalty Or Always print form and add penalty)

Form R-210NR - NR and PY Organizer | States | Add States/Cities | Louisiana | Select "NR - Nonresident (Organizer | States | Louisiana | Penalties and Interest | Penalties and Interest | Check box "Always print form, but do not add penalty Or Always print form and add penalty)

Form R-210NRA Organizer | States | Add States/Cities | Louisiana | Select "NR - Nonresident AND Organizer | States | Louisiana | General Information | Check box "Nonresident professional athlete (Organizer | States | Louisiana | Penalties and Interest | Penalties and Interest | Check box "Always print form, but do not add penalty Or Always print form and add penalty)

Form R-2868	Organizer Payments and Extensions Extensions State Options and Payments Louisiana Select something other than "Not applicable"
Form R-3400	Organizer States Louisiana Credits General Credits Enter value "The value of computer equipment donated"
Form R-540V	Organizer E-file Enable/Create Louisiana Return Enable E-file AND Organizer States Common State Bank Information Return Column I Enter Amount
Form R-8453	Organizer E-file Enable/Create Return Enable E-file AND Organizer E-file Enable/Create Return Signature Form Option Select "Form LA-8453"
IT-540BPYM	
Schedules C, CNR, D, E, F, I, J, NRPA,	Schedule C Organizer States Add States/Cities Louisiana Select "R - Resident Schedule CNR Organizer States Add States/Cities Louisiana Select "NR - Nonresident Schedule D Tax Forms States Louisiana Resident - Schedules Sch D - Donations Form must have values Schedule E Organizer States Common State Federal Amounts Adjusted Gross Income Value will pull from Federal 1040 Page 1 and 2 Organizer States Louisiana Adjustments to Federal Amounts Other Additions Enter value Organizer States Louisiana Adjustments to Federal Amounts Depreciation Adjustment per Job Creation and Worker Assistance Act Enter Value Schedule F Organizer States Louisiana Credits General Credits Refundable Tax Credits Enter values Schedules H and I Organizer States Louisiana Credits General Credits Sch C - Other Nonrefundable Priority 1 Credits Enter values Tax Forms States Louisiana Resident Resident - Schedules Schs H Line 1 or Line 3 must have a value Tax Forms States Louisiana Resident Resident - Schedules Schs I Line 6 must have value Schedule J Organizer States Add States/Cities Louisiana Select "R - Resident Schedule J NR Organizer States Add States/Cities Louisiana Select "NR - Nonresident Not Organizer States Louisiana General Information Don't check "Nonresident professional athlete"

Maine

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Form/Schedule	Requirement(s) to Print
Form 1040ES-ME	Organizer States Common State Estimates
Form 1040EXT-ME	Tax Forms States Maine Resident 1040EXT-ME - Extension Payment Voucher - Select an options
Form 1040ME	Organizer States Add States/Cities
Form 1040ME-PV	Tax Forms States Maine Resident 1040ME-PV - Tax Payment Voucher
Form 1099-ME	Organizer States Maine 1099ME Testing - withholding exist
Form 2210ME	Print if 2210 is not suppress and line 5 is more than \$999
Schedule 1A	
Schedule 1S	
Schedule 2	

Schedule A	Tax Forms States Maine Resident Sch A - Tax Adjustments Page 1 and if total exist on line 23 ore if line 3 or line 19 or line 20 exists
Schedule CP	Tax Forms States Maine Resident Sch CP - Contribution and Park Passes if line 11 exist
Schedule ETM	
Schedule NR	Nonresident and Part-Year Residents and line 9 non-resident credit exist
Schedule NRH	Line 11 nonresident credit exist
Schedule PTFC/STFC	If line 9 exist or if line 14 or if line 14a.
Worksheet 2210	
Worksheet A & B	Line 12 exist and not suppress to print
Worksheet AdultDepCareCred	
Worksheet C	Organizer States Add States/Cities
Worksheet CCC	
Worksheet DepExpTxCred	
Worksheet EITC	
Worksheet FamAndMedLeaveCred	
Worksheet HistoricRehabCred	
Worksheet OJ	
Worksheet PTDevZoneCred	
Worksheet SchISOtherSubModCred	
Worksheet SchISPenDed	
Worksheet SchAOtherTaxCred	
Worksheet SeedCapCred	
Worksheet StuLoanRepayCred	
Worksheet VolFireEMSCred	
Worksheet WellnessProgCred	

Maryland

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 500CR	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form option + Enabled e-file for Maryland + Authorize preparer to not file electronically checkbox is not marked (Organizer States E-file Additional Information) + Suppress print of Form 500CR is not selected + Credit amount is reported on Part BB line 28 or 34, Part CC line 7, or Part DD line 9
Form 500DM	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form option (Organizer States Maryland Amended Return) + Modification amount exist on Form 500DM line 6 or 7.
Form 502	
Form 502B	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + Any number of dependent is reported on line 1 of Form 502B
Form 502CR	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + 1) Page 1 Resident or Part-year resident + Any of state name is marked to compute credit (Organizer States Maryland Credits General Credits Credit for Taxes Paid to Other (States(s) hyperlink) + A credit amount reported on Form 502CR, Part K Line 1 or Part L line 1 2) Page 2 and 3 A credit amount reported on Form 502CR, Part K line 11, Part L line 1, or Part M line 6.
Form 502DEP	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Suppress compute and print of estimated tax is not selected (Organizer States Maryland Estimated Tax) + Either 1) either internal Batch Estimates is not selected or the Do not Generate Batch Package option is selected (Organizer Estimates and Extension Package Estimate and Extension Package) or 2) Alpha only option is not selected for internal Batch Estimates + Either 1) estimated tax payment amounts are overridden (Organizer States Maryland Estimated Tax) or 2) either 1) amount of Form 502D line 16 is greater than equal to \$500 or 2) amount of Form 502D line 16 is less than equal to \$500, but Supress print if estimated tax is less than threshold checkbox is not marked.
Form 502R	Resident status is Resident or Part-year resident (Organizer States Add States/Cities Maryland - "R" or PY") + Printing extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + If 1) an amount is reported on the Federal 1040 line 4b or 5b or 2) an amount is reported on Form 502R line 26 or 27 or 3) an amount is reported on Form 502SU line r.
Form 502R	

Form 502S	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + Form 502S is not suppressed + Credit or recapture amount is on Form 502S line 6.
Form 502SU	Resident status is Resident or Part-year resident (Organizer States Add States/Cities Maryland - "R" or "PY"). + Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + Total subtraction amount is reported on the last field on Form 502SU, Page 3 line 1
Form 502TP	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form (Organizer States Maryland Amended Return) + The amount of taxable preference items on Form 502TP line 5 is not exceed the maximum allowed exclusion (\$10,000 or \$20,000 for joint return).
Form 502UP	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + Suppress penalty computation and od not print form option is not selected (Organizer States Maryland Penalties and Interest) + 1) Interest/penalty is calculated on Form 502U line 18 or 2) the special code 301 is reported on page 3 of Form 502 or 505 or 3) Always print form option is selected on the state Penalties and Interest organizer.
Form 502V	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + An amount is reported on Form 502V line 6.
Form 502X	Resident status is Resident or Part-year resident (Organizer States Add States/Cities Maryland - "R" or "PY") + Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + An amended return option, how original return was field, is selected + An amended return printing option is selected (Organizer States Maryland Amended Return) If the amended return has no changes in income and adjustments from the original return, Form 502X, Page 3, Part II, lines 1-10 of column c and Form 502X Pages 3, Part 1, lines 1-16 of column c are not printing. To force print the lines, go to Organizer States Maryland Amended Return Amended return and select the force print checkboxes on this organizer.
Form 505	Nonresident (Organizer States Add States/Cities Maryland - "NR") + Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) To force print all lines of Form 505: When the Maryland tax was withheld in error checkbox is marked on the state General Information organizer, only lines specified in the state filing instructions will be printed. To print all lines of the form, go to Organizer States Maryland Return Option and select the force print option.

Form 505NR	Resident status is Nonresident (Organizer States Add States/Cities Maryland - "NR") + Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form only option (Organizer States Maryland Amended Return) + 1) if Maryland gross income is less than minimum filing levels checkbox is not marked (Organizer States Maryland General Information) + Maryland taxable income exist or 2) if force print of Form 505NR option is selected (Organizer States Maryland Return Options).
Form 505SU	Resident status is Nonresident (Organizer States Add States/Cities Maryland - "NR") + Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + An amended return option, how original return was field, is selected (Organizer States Maryland Amended Return) + An amended return printing option is selected (Organizer States Maryland Amended Return) If the amended return has no changes in income and adjustments from the original return, Form 505X, Page 3, Part II, lines 1-10 of column c. To force print the lines, go to Organizer States Maryland Amended Return Amended return and select the force print checkbox on this Organizer.
Form 505X	Resident status is Nonresident (Organizer States Add States/Cities Maryland - "NR") + Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments) + An amended return option, how original return was field, is selected (Organizer States Maryland Amended Return) + An amended return printing option is selected.
Form 510 Schedule K-1	It is an E-file only form and will not be printed.
Form 588	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Not selected the Printing amended return form option + The direct deposit amount is entered for the both first and second accounts on Form 588.
Form EL101	Enabled e-file for Maryland (Organizer E-file Enable/Create) + Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + 1) Amended return with completed return print option is selected (Organizer States Maryland Amended Return) or 2) amended return print option is not selected + 1) Taxpayer and/or Spouse PIN numbers are entered on Form EL101, Part II or 2) the use of practitioner PIN method option is selected on Form EL101, Part II.
Form PV - Extension Application	Extension option is selected for Maryland (Organizer Payments and Extensions State Options and Payments tab) or Batch Extension option is selected (Organizer Estimates and Extension Package)
Form PV - Payment voucher for Form 502/505	Either 1) Amended return with completed return print option is selected (Organizer States Maryland Amended Return) or 2) Amended return print option is not selected + A payment amount is on Form PV + Suppress of Form PV for Form 502/505 is not marked (Organizer States Maryland Return Options).

Form PVW - Estimated Tax Worksheet	Print extension application form only option is not selected (Organizer Payments and Extensions Extensions State Options and Payments tab) + Suppress compute and print of estimated tax is not selected (Organizer States Maryland Estimated Tax) + Either 1) either internal Batch Estimates is not selected or the Do not Generate Batch Package option is selected (Organizer Estimates and Extension Package Estimate and Extension Package) or 2) Alpha only option is not selected for internal Batch Estimates + Browser Batch Estimates is not selected. Force print: The force print of estimated tax worksheet for applicable jurisdictions option is selected (Organizer Common States Estimates)
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MD 1099G

Massachusetts

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Form/Schedule	Requirement(s) to Print
Change of Address Form	Organizer States Add States/Cities Massachusetts Resident, part-year, non-resident selected + Organizer Payments and Extensions Extensions State Options and Payments Massachusetts Option 1 is NOT selected + Organizer States Massachusetts Change of Address Information 'Print Change of Address Form' checkbox is selected
Form 1	Organizer States Add States/Cities Massachusetts Resident selected + Organizer Payments and Extensions Extensions State Options and Payments Massachusetts Option 1 is NOT selected
Form 1-ES	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer Payments and Extensions Extensions State Options and Payments Massachusetts Option 1 is NOT selected + Tax Forms States Massachusetts Resident 1-ES - Estimated Tax Worksheet Line 12 is greater than 1 AND Organizer States Massachusetts Estimated Tax Estimate Option Estimate with alphabetic Information only AND Suppress compute and print are NOT selected + Organizer States Massachusetts Estimated Tax Suppress print if no payments are due after applying overpayment is NOT selected AND Tax Forms States Massachusetts Resident 1-ES - Estimated Tax Worksheet Total Column B Amount is NOT less than 0
Form 1-NR/PY	Organizer States Add States/Cities Massachusetts Non-resident, or Part-year is selected + Organizer Payments and Extensions Extensions State Options and Payments Massachusetts Option 1 is NOT selected
Form EFO	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts E-file Additional Information E-file opt out election is checked
Form M-1310	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Return Options Print Suppression Form M-1310 is NOT checked + Organizer States Massachusetts Refund Due Deceased Taxpayer Decedent name AND Date of Death exists OR Organizer General Information Basic Return Information Taxpayer Information Date of Death exists

Form M-2210	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Penalties and Interest Penalties and Interest tab Option to Compute and Print Underpayment Penalty 'Suppress penalty computation and do not print form' is NOT selected AND [Tax Forms States Massachusetts Part-year Resident/Nonresident M-2210 - Underpayment Penalty Page 2 Line 23 has an amount OR Tax Forms States Massachusetts Part-year Resident/Nonresident M-2210 - Underpayment Penalty Page 1 If any of the three selections below is checked: 1. You are a qualified farmer or fisherman filing and paying your full amount due on or before... 2. You were a resident of Massachusetts for 12 months and not liable for taxes during... 3. Your estimated payments and withholding equal or exceed your...]
Form M-2210A	N/A, PRINTS ON M-2210 PAGE 3
Form M-4868	Organizer States Add States/Cities Massachusetts Resident, part-year, non-resident selected + Organizer Payments and Extensions Extensions State Options and Payments Massachusetts Options 1 or 3 are selected + Tax Forms States Massachusetts Resident M-4868 - Extension Application Line 7 is greater than 0 and less than 5000
Form M-8453	Organizer E-file Enable/Create Column B Massachusetts row is enabled
Form M-9325	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer E-file Enable/Create Column B Massachusetts row is enabled
Form MAForm2G	
Form MAM8379	
Form PV	Organizer States Massachusetts Return Options Print Suppression 'Massachusetts payment voucher' is NOT checked + Organizer E-file Enable/Create Column B Massachusetts row is enabled + Tax Forms States Massachusetts Part-year Resident/Nonresident PV - Payment Voucher Amount Enclosed Amount here exists
FormMAForm2G	
Massachusetts Depreciation Report	Organizer States Add States/Cities Massachusetts Non-resident, or Part-year is selected + Organizer Payments and Extensions Extensions State Options and Payments Massachusetts Option 1 is NOT selected + Organizer Income Business Income (name) Depreciation and Amortization Asset Detail at least ONE asset OR + Organizer Income Schedule K-1 (name) General Business Expense General Information Depreciation and Amortization Asset Detail at least ONE asset
Schedule B	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch B 12% Income Page 1 Line 2 is greater than 1500 OR Tax Forms States Massachusetts Part-year Resident/Nonresident Sch B 12% Income Page 1 Line 9 is greater than 0 or Line 1 minus line 5 is greater than 0 OR Tax Forms States Massachusetts Part-year Resident/Nonresident Sch B 12% Income Page 1 Line 4, 10, 11, 16, 17, or 18 has an amount

Schedule C	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer Income Business Income At least one business name exists + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch C - Business Profit or Loss (Business Name) Page 2 Line 31 has an amount
Schedule C-2	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch C-2 - Excess Deductions Line 8 or 11 has an amount greater than 1 OR Tax Forms States Massachusetts Part-year Resident/Nonresident Sch C-2 - Excess Deductions Line 9 and 12 has an amount less than 0
Schedule CB	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Return Options Force print 'Schedule CB' is selected OR Tax Forms States Massachusetts Part-year Resident/Nonresident Sch CB - Senior Circuit Breaker Credit Line 17 or 21 is greater than 0
Schedule CMS	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Tax Forms States Massachusetts Resident Sch CMS - Credit Management Sch Page 1, 2, 3, or 4 has their total amount field populating *Note: Please enter the credits within this folder: Organizer States Massachusetts Credits Folder
Schedule CRS	Organizer States Add States/Cities Massachusetts Non-resident, or Part-year is selected + Organizer Payments and Extensions Extensions State Options and Payments Massachusetts Option 1 is NOT selected + Organizer States Massachusetts Amended Return Amended Return is not checked + Organizer States Massachusetts Credit Recapture (Schedule CRS) At least one input exists
Schedule D	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch D - Capital Gains and Losses Line 9, 10, 12, 14, 16, 19, 20, OR 22 has an amount + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch D-IS - Capital Gains with Installme Page 1 line 13 does NOT have an amount or Tax Forms States Massachusetts Part-year Resident/Nonresident Sch D-IS - Capital Gains with Installme Page 5 Line 26B Does NOT have an amount
Schedule DI	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Amended Return Amended Return is not checked + Tax Forms States Massachusetts Resident or (Part-year Resident/Nonresident) Sch DI - Dependent Information Must have at least one dependent.
Schedule D-IS	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Amended Return Amended Return is not checked + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch D-IS - Capital Gains with Installme Page 1 line 13 does have an amount or Tax Forms States Massachusetts Part-year Resident/Nonresident Sch D-IS - Capital Gains with Installme Page 5 Line 26B does have an amount.

Schedule E	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Tax Forms States Massachusetts Resident or (part-year/Non-resident) Sch E - Rental, Partnership Sch E-1 or Sch E-2 or Sch E-3 is printing
Schedule E-1	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + (Organizer Income Rent and Royalty (Property Name) Must have at least one property or Organizer State Massachusetts Massachusetts Schedule K-1 Schedule K-1 Information Must have data state compute column) + Tax Forms States Massachusetts Resident or (part-year/Non-resident) Sch E - Rental, Partnership Sch E-1 - Rental RE and Royalties (Name) Line 1, 2, 19, or 21 has an amount
Schedule E-2	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer State Massachusetts Massachusetts Schedule K-1 Schedule K-1 Information Must have data state compute column + Tax Forms States Massachusetts Resident or (part-year/Non-resident) Sch E - Rental, Partnership Sch E-2 - Partnership and S-Corp (Name) line 11 has an amount
Schedule E-3	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer Income REMIC (name) must have at least one REMIC or Organizer Income Farm Income (name) at least one farm
Schedule EC	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Credits Wind and Solar Energy Credit (name) at least one credit entry + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch EC - Solar and Wind Energy Credit (name) Page 1 line 8 exists
Schedule FAF	
Schedule FCI	
Schedule HC	Organizer States Add States/Cities Massachusetts Resident (Over 18 for at least 3 months), or Part-year Over 18 and MA residency for more than 3 months is selected
Schedule HC-CS	Organizer States Add States/Cities Massachusetts Resident (Over 18 for at least 3 months), or Part-year Over 18 and MA residency for more than 3 months+ Organizer States Massachusetts Health Care Information Taxpayer (or spouse) Additional Providers hyperlink At least one entry for Taxpayer OR Spouse on this screen
Schedule INC	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts MA Schedule Inc Inputs exist for either Form W-2, W-2G, or 1099R + Tax Forms States Massachusetts Resident Sch INC - W-2 and 1099 Information Page 1 Column b total exists
Schedule LP	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Credits Lead Paint Credit Either Interim Control De-leading OR Full Compliance De-leading has at least one input

Schedule NTS-L-NR/PY	Organizer States Add States/Cities Massachusetts Non-resident, or Part-year is selected + Tax Forms States Massachusetts Part-year Resident/Nonresident 1-NR/PY - Income Tax Return Page 4 Line 31 has an 'X' OR Tax Forms States Massachusetts Part-year Resident/Nonresident Sch NTS-L-NR/PY - No Tax/Limited Income Line 17 has an amount
Schedule OJC	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Tax Forms States Massachusetts Part-year Resident/Nonresident Sch OSC - Out of State Credit At least one Jurisdiction on the table (enter the information on: Organizer States Massachusetts Credits Credits 'Credit for Taxes Paid to Other State(s)' hyperlink)
Schedule PWHWA	
Schedule R/NR	Organizer States Add States/Cities Massachusetts Non-resident, or Part-year is selected + Organizer States Massachusetts Part-year/Nonresident Allocation 'If filing both as a resident and non-resident' is checked
Schedule SC	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Credits Septic Credit Add new Resident address for septic... At least one entry for Sch SC + Organizer States Massachusetts Credits Septic Credit (name) Add new Sch SC Owners Name if Multip... At least one address entry
Schedule SRTX	
Schedule TDS	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Organizer States Massachusetts Taxpayer Disclosure Statement Add new Disclosure number At least one disclosure entry
Schedule X/Y	Organizer States Add States/Cities Massachusetts Resident, Non-resident, or Part-year is selected + Tax Forms States Massachusetts Part-year Resident/Nonresident Schs X and Y - Other Income and Deducti Sch X Line 5 or Sch Y line 19 has an amount

Michigan

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 3174	Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) The property tax credit is calculated on Form MI-1040CR-7, line 44 or 2) Taxpayer does not wants to receive a refund from the heat provider (Form MI-1040CR-7 line 15) + Bank routing number is provided (Organizer States Common States Bank Information) + Direct deposit is not suppressed.
Form 4, Extension	Batch Extension is not selected Either 1) printing the extension form with all other forms: either 1) extension option is 1 (Extension only, alpha and numeric entires) or 2) extension option is 3 (Extension with tax return, alpha and numeric entires) or 2) printing Alpha information only: either 1) extension option is 2 (Extension only, alpha only) or 2) extension option is 4 (Extension with tax return, alpha only).

Form 4013	Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + A name of tribal affiliation is selected from the drop-down on General Credit organizer (Organizer States Michigan Credits General Credits).
Form 5049	
Form 5049	Either the state extension option is not selected or the extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Filing Form 1040-CR or 1040-CR2 to claim Homestead Property Tax Credit, or/and 1040-CR7 to claim Home Heating Credit. + Either if 1) taxpayer's income exist or 2) spouse's income exist or provided explanation why spouse's income did not included on Form 5049.
Form 5595	
Form 5595	
Form 5606	
Form 5674	
Form 5678	
Form 5792	
Form 5889	
Form MI-1040	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab).
Form MI-1040CR	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) The property tax credit is calculated on Form MI-1040CR, line 44, and the credit amount is not overridden. If he taxpayer is a veteran and the amount on MI-1040-CR, line 44 is greater than the amount on Form MI-1040CR-2 line 33, Form MI-1040CR will be printed, instead of Form MI-1040CR-2 or 2) force print Form MI-1040CR is selected (Organizer States Michigan Credits Homestead Property Tax Credit).
Form MI-1040CR-2	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) The property tax credit is calculated on Form MI-1040CR-2, line 33, and the credit amount is not overridden. Also, the amount of credit on MI-1040CR-2, line 33 is greater than the amount on Form MI-1040CR line 44. or 2) force print Form MI-1040CR-2 is selected (Organizer States Michigan Credits Homestead Property Tax Credit).
Form MI-1040CR-5	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + The Farmland Preservation Credit is calculated on Form MI-1040CR-5, line 15 or 20 + The credit amount is not overridden.

Form MI-1040CR-7	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) The property tax credit is calculated on Form MI-1040CR-7, line 43, and the credit amount is not overridden. or 2) force print Form MI-1040-CR-7 is selected (Organizer States Michigan Credits Homestead Property Tax Credit).
Form MI-1040D	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + The option for compute and print Form MI-1040D and MI-4797 is selected (Organizer States Michigan Form MI-1040D and Form MI-4797).
Form MI-1040ES	Taxpayer (also spouse, if MFJ) is not deceased. + Not selected the option to print extension application form only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Suppress compute and print of estimated tax option is not selected (Organizer States Michigan Estimated Tax) + Either 1) Estimate equal to Current Year overpayment estimated tax option is not selected on the state Estimated Tax organizer or 2) Estimate equal to Current Year overpayment estimated tax option is selected + Batch Estimates is alpha only + Either 1) Any of payment voucher amount are overridden on the state Estimated Tax organizer or 2) All of payment voucher amounts are not overridden + The amount one MI-1040ES worksheet line 8 is greater than 0 + Either 1) MI-1040ES worksheet line 8 is less than \$500, but the suppress of estimated tax under \$500 checkbox or 2) MI-1040ES worksheet line 8 is more than \$500 MI-1040ES Worksheet: + Batch Estimates is not alpha only + either 1) If alpha only option is not selected for Batch Estimates or 2) If estimate payment is necessary and estimate is not suppressed + Internal Batch Estimates and Extension is not selected or the Do not Generate Batch Package option is selected (Organizer Estimates and Extension Package Estimate and Extension Package) + Browser Batch Estimates is not selected. Force print worksheet: Force print of estimated worksheet for applicable jurisdictions checkbox is selected on the Common State's Estimates organizer (Organizer States Common State Estimates).
Form MI-1040H	Enter federal Schedul C or/and K-1 information that will flow to Michigan Apportionment Schedule organizer + Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Name of business activity exist + An amount of business income is reported on Form MI-1040H, line 9.
Form MI-1040V	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Enable e-file of Michigan return + Balance due + Direct debit option is not selected.
Form MI-1045	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Loss year is entered (Organizer States Michigan Net Operating Loss Loss Year). + Print of Form MI-1045 is selected on the New Operating Loss Year organizer + Net operation loss is greater than 0 (Form MI-1045, line 22) . Print page 3 if the computation of FMTI is required: Compute and print MI-1045 Page 3 (Override) checkbox is selected.

Form MI-1310	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Print Form MI-1310 option is selected (Organizer States Michigan Refund Due Deceased Taxpayer). + Date of death is reported on Form MI-1310 + Tax refund amount is greater than 0 (Form MI-1040, line 36).
Form MI-2210	Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) use annualized installment method checkbox is marked (Tax Forms Michigan Residency Form MI-2210, Line 9) or 2) Suppress computation and printing of penalties and interest option is not selected (Organizer States Michigan Penalties and Interest). + Total penalty and interest amount Form MI-2210, line 28 is greater than 0, if the default penalty option is selected.
Form MI-4642	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) total contribution amount is greater than 0 (Form MI-4642, line 7) or 2) force print of Form MI-4884 is selected (Organizer States Michigan Adjustments to Federal Amounts).
Form MI-4797	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + The option for compute and print Form MI-1040D and MI-4797 is selected (Organizer States Michigan Form MI-1040D and Form MI-4797).
Form MI-4884	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Retirement and pension benefit subtractions is exist (Form MI-4888, line 15, 26, 27, or 28).
Form MI-4973	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Retirement and pension benefit subtractions is exist (Form MI-4888, line 15, 26, 27, or 28). + The number of retirement income source documents is greater than 10.
Form MI-4976	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) The property tax credit is calculated on Form MI-1040CR-7, line 43, and the credit amount is not overridden. or 2) force print Form MI-1040-CR-7 is selected (Organizer States Michigan Credits Homestead Property Tax Credit). + The number of dependent is greater than 6.
Form MI-8453	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Enabled e-file for Michigan. + MI-8453 is selected as the E-file signature form on the E-file spreadsheet (Organizer E-file Enable/Create Column I)
Form MI-8949	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Either 1) Amount of federal short-term gain/loss reported on Form MI-1040D, line 1 column D is greater than 0 or 2) Amount of federal long-term gain/loss reported on Form MI-1040D, line 6 column D is greater than 0.

Schedule 1	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Total additions to income is greater than 0 (Schedule 1 line 9) or/and total subtractions to income is greater than 0 (Tax Forms States Michigan Residency Schedule 1).
Schedule AMD	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Amended return checkbox is marked (Organizer States Michigan Amended Return Amended Return).
Schedule CR-5	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Farmland Development Rights Agreement number is entered (Organizer States Michigan Credits Farmland Preservation Credit) + The Farmland Preservation Credit amount is not overridden on the Farmland Preservation Credit organizer. + Either 1) Amount on Form MI-1040CR-5 line 15 is greater than 0 or 2) Amount on Form MI-1040CR-5 line 20 is greater than 0.
Schedule NR	Resident status is Part-year or Nonresident (Organizer States Add States/Cities - Michigan "PY" or "NR") Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab).
Schedule W	Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + State tax withholding on Schedule W, line 7 is greater than 0.

Michigan Cities: Common Forms

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

Form 1040	Select "Not Listed" from the City in which income was earned (Mandatory) drop-down list. + Enter the city name to City name if "City not listed" is chosen + Select an option from If "City not listed" is chosen + Select the Filing Address for City of section.
Form 1040ES	Taxpayer (also spouse, if MFJ) is not deceased. + Selected "Not Listed" from the City in which income was earned (Mandatory) drop-down list. + The city name is entered to City name if "City not listed" is chosen field (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name General Information) + Selected an option from If "City not listed" is chosen, + Select the Filing Address for City of section. + Either 1) Any of payment voucher amount are overridden on the Estimated Tax organizer or 2) All of payment voucher amounts are not overridden + The amount on the estimated tax worksheet line 6 is greater than 0 + Either 1) estimated tax worksheet line 6 is less than the threshold but the suppress of estimated tax under threshold checkbox is selected or 2) estimated tax worksheet line 6 is more than the threshold Force print the estimated tax worksheet: Force print estimates worksheet for applicable jurisdictions checkbox is selected on the Common State's Estimates organizer (Organizer States Common State Estimates).

Form CF-1040	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) no amended return print option is selected or 2) print Form CF-1040X and complete city return is selected.
Form CF-1040 Excludible Income and Adjustments Schedules	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) no amended return print option is selected or 2) print Form CF-1040X and complete city return is selected.
Form CF-1040 Exemptions Schedule	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) no amended return print option is selected or 2) print Form CF-1040X and complete city return is selected. + Number of dependent reported on CF-1040, Page 2, lines 1f or/and 1g is greater than 0 or have W-2 wages income or/and exclusion or any deductions reported on the Deductions Schedule on CF-1040, Page 2 or address was changed during the tax year.
Form CF-1040 Supporting Statements	The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) no amended return option is selected or 2) print Form CF-1040X and complete city return is selected. + Credit for tax paid to other cities is claimed on Form CF-1040, line 24c. or City tax was paid by partnership and the amount is included in Form CF-1040, line 24b. or the number of dependent is greater than 8 or the number of address changed during tax year is greater than 5 or the number of IRA distributions exclusion transactions is greater than 4 or the number of pension benefits exclusion transactions is greater than 4.
Form CF-1040 Wages and Excludible Wages Schedule	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) no amended return option is selected or 2) print Form CF-1040X and complete city return is selected. + Have W-2 or/and other wages income.

Form CF-1040-ES	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) Alphan Only is not selected for Batch Estimates option or 2) Both supress of estimates is not selected and the entire overpayment is not applied to the next year's estimated tax + Both line 7 of the estimated tax workshet is not less than threshold and suppress esitmates if estimated tax is less than the threshold is not selected + Taxpayer (both taxpayer and spouse if MFJ) is not deceased + Browser batch estimates is not selected + Eiter 1) Internal batch estimates and extension is not slected (Organizer Estimates and Extension Package Estimate and Extension Package) or 2) Do Not Generate Batch Package is selected for internal batch estimates and extension. Force print the estimated tax worksheet: Force print esitmates worksheet for applicable jurisdictions checkbox is selected on the Common State's Estimates organizer (Organizer States Common State Estimates).
Form CF-1040ES Computation Worksheet	The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) Alphan Only is not selected for Batch Estimates option or 2) Both supress of estimates is not slected and the entire overpayment is not applied to the next year's estimated tax + Both line 7 of the estimated tax workshet is not less than threshold and suppress esitmates if estimated tax is less than the threshold is not selected + Taxpayer (both taxpayer and spouse if MFJ) is not deceased.
Form CF-1040ES-EFT	The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) Alphan Only is not selected for Batch Estimates option or 2) Both supress of estimates is not selected and the entire overpayment is not applied to the next year's estimated tax + Both line 7 of the estimated tax workshet is not less than threshold and suppress esitmates if estimated tax is less than the threshold is not selected + Taxpayer (both taxpayer and spouse if MFJ) is not deceased. + Print option for use CF-1040ES-EFT is selected.
Form CF-1040X	The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) amended return option is selected or 2) Form CF-1040X print option is selected (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name Amended Return).

Form CF-4220	The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) no amended return option is selected or 2) print Form CF-1040X and complete city return is selected. + If city code is equal to FL, HM, HP, IO, LP, PO, SA, AND SF
Form CF-4868	The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + 1) Extension option is selected (Organizer Payments and Extensions Extensions State Options and Payments) or 2) Batch Extension is selected (Organizer Estimate and Extension Package Estimate and Extension Package) + Print of Form CF-468-EFT is not selected (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name Extension Information).
Form CF-4868-EFT	The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + 1) Extension option is selected or 2) Batch Extension is selected + Print of Form CF-468-EFT is selected.
Schedule TC	Resident status is "Schedule TC" (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name) +The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Either 1) no amended return option is selected or 2) print of Form CF-1040X and complete city return is selected.

Michigan Cities: Detroit

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 5118	Resident status is "Resident" (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name) + The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab).
Form 5119	Resident status is "Nonresident" (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name) +The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab).

Form 5120	Resident status is "Part-year Resident" (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name) + The city name is selected from the City in which income was earned (Mandatory) drop-down list Select the city name from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab).
Form 5121	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + City tax was withheld on W-2, 1099s, or K-1s.
Form 5122	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either no extension option is selected or extension option is not Alpha only (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name Extension Information) + Michigan state e-file is not enabled or has been already filed + Enable e-file of Detroit return + Balance due + Direct debit option is not selected.
Form 5123	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Suppress of compute and print estimated tax is not selected + Either 1) Alphan Only is not selected for Batch Estimates option or 2) Entire overpayment is not applied to the next year's estimated tax option is not selected + Both line 7 of the estimated tax workshet is not less than threshold and suppress esitmates if estimated tax is less than the threshold is not selected + Taxpayer (both taxpayer and spouse if MFJ) is not deceased + Browser batch estimates is not selected + Eiter 1) Internal batch estimates and extension is not slected (Organizer Estimates and Extension Package Estimate and Extension Package) or 2) Do Not Generate Batch Package is selected for internal batch estimates and extension. Force print the estimated tax worksheet: Force print esitmates worksheet for applicable jurisdictions checkbox is selected on the Common State's Estimates organizer (Organizer States Common State Estimates).
Form 5209	Select the city name from the City in which income was earned (Mandatory) drop-down list + 1) Extension option is selected (Organizer Payments and Extensions Extensions State Options and Payments) or 2) Batch Extension is selected (Organizer Estimate and Extension Package Estimate and Extension Package).
Form 5253	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + City tax was withheld on W-2, 1099s, or K-1s. + The total number of W-2s and 1099s filing is greater than 8 or/and the number of K-1s is greater than 3.
Form 5327	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + Form 5119, line 10 is greater than 0. + Business and farm income for the city is driven from 2 or more different entities.

Form 5338	The city name is selected from the City in which income was earned (Mandatory) drop-down list + Either 1) no extension option is selected or 2) extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab). + If one of followings 1) Use annualized installment method is selected (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name Penalties and Interest) or 2) Total penalty and interest amount is greater than 0 (Form 5338, line 28) + Suppress computation and printing of Form 5338 is not selected on the state Penalties and Interest organizer. or 3) Always print Form 5338 option is selected on the city Penalties and Interest Organizer.
Form MI-8453	Resident status is selected on the city organizer (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name) + Either no extension option is selected or extension option is not Alpha only (Organizer Payments and Extensions Extensions State Options and Payments tab) + Michigan state e-file is not selected or has already been filed. + Enabled e-file for Detroit standalone return. + MI-8453 is selected as the E-file signature form on the E-file spreadsheet (Organizer E-file Enable/Create Column I)
Schedule AMD	Resident status is selected on the city organizer (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name) + Either no extension option is selected or extension option is not Alpha only (Organizer Cities, Counties, Intangibles, Tangible Michigan Cities Michigan Cities City Name Extension Information) + Amended return checkbox is marked.

Minnesota

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Amended Income Tax Return Payment Voucher	A residency status has been selected. + An option other than Not applicable has been selected in Organizer States Minnesota Amended Returns in the Mandatory Information section. + There is an amount due on line 33 of Form M1X, Page 2. AND + The Amount of Check is present on the Amended Payment Voucher.
Form 2441	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. AND + The first print option is not selected in Organizer States Minnesota Amended Return Print Options section. + Either of the checkboxes has been selected on Schedule M1CD regarding claiming the credit for your own child.
Form BANK	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + E-file is enabled for the regular return. + The authorization to debit funds checkbox is selected in Organizer States Common State Bank Information Return tab. + There is an amount on Form M1, Page 2, line 30.

Form ETP	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. AND + The first print option is not selected in Organizer States Minnesota Amended Return Print Options section. + There is an amount on line 4 of Form ETP.
Form KFNC	
Form KPINC	
Form KSNC	
Form LK	
Form M1	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section.
Form M1C	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 10 of Form M1C.
Form M1CAT	
Form M1M	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on Schedule M1M, Page 1, line 17. OR + There is an amount on Schedule M1M, Page 2, line 44.
Form M1MA	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + Married filing jointly. + There is an amount on either line 8, 19, or 21 of Schedule M1MA.
Form M1MOVE	
Form M1NR	A residency status is not resident. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + Not a reciprocity state with data on line 25 of Schedule M1M.
Form M1PR	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 15 of Form M1PR. + The option to "Suppress printing property tax refund amount on Form M1PR" is not selected in Organizer States Minnesota Property Tax Refund Property Tax Refund.

Form M1PSC	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is a date entered on line 3 of Schedule M1PSC.
Form M1REF	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 6 of Schedule M1REF.
Form M1SA	
Form M1UE	
Form M1W	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + An amount needs to be on line 4 for Page 1 to print. + For Page 2 to print there either needs to be more than 5 W-2 forms, four 1099 and W-2-G forms, or an amount on line 7 of Page 2.
Form M1WFC	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 5 or line 6 of Schedule M1WFC.
Form M1X	A residency status has been selected. + An option other than Not applicable has been selected in Organizer States Minnesota Amended Returns in the Mandatory Information section.
Form M99	A residency status has been selected. + There is an amount on line 2 of Form M99.
Income Tax Estimated Tax Payment Voucher	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is a total amount in column b on the M14 Estimated Tax Worksheet. + The amount on line 4 of the Estimated Tax Worksheet is not below \$500. + None of the suppress print options are selected in Organizer States Minnesota Estimated Tax.
Income Tax Extension Payment Voucher	A residency status has been selected. + Any of options 1 through 4 are selected for Minnesota in Organizer Payments and Extensions Extensions State Options and Payments tab.
Income Tax Return Payment Voucher	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + E-file is not enabled. + There is an Amount of Check on the payment voucher. + There is an amount on Form M1, Page 2, line 30.
Schedule CRP	

Schedule M15	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + The option to "Suppress penalty computation and do not print form" is not selected in Organizer States Minnesota Penalties and Interest Penalties and Interest tab. + There is no data on line 25 of Schedule M1M.
Schedule M1529	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on Schedule M1529, line 4 or line 5.
Schedule M1B	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 5 of Schedule M1B.
Schedule M1CD	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 4 or line 8 of Schedule M1CD.
Schedule M1CMD	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount line 6 or line 8 of Schedule M1CMD.
Schedule M1CR	A residency status is resident or part-year resident. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + A state has been marked to compute credit in Organizer States Minnesota Credit for Tax Paid. + There is no amount on line 7 of Schedule M1RCR.
Schedule M1CWFC	
Schedule M1DQC	
Schedule M1ED	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 18 or line 19.
Schedule M1HOME	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an account number on Schedule M1Home.

Schedule MILS	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 11 of Schedule MILS.
Schedule MILTI	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 9 or line 10 of Schedule MILTI.
Schedule MIMB	
Schedule MIMT	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + The option to force print Form 6251 is selected in Organizer General Information Return and Print Options Tax Form Options (contd) tab. OR + The option to force print Schedule MIMT is selected in Organizer States Minnesota Taxes Taxes tab. OR + The amount on line 27 is greater than the amount on line 28 of Schedule MIMT. + There is no data on line 25 of Schedule MIM.
Schedule MIMTC	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 24 or line 28 of Schedule MIMTC.
Schedule MINC	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 15 of Schedule MINC.
Schedule MIR	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 13 of Schedule MIR.
Schedule MIRCR	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 7 of Schedule MIRCR.
Schedule MISLC	A residency status has been selected. + Either of options 3, 4, or 5 are selected for Minnesota in Organizer Payments and Extensions State Options and Payments. + An option other than Not applicable should not be selected in Organizer States Minnesota Amended Return Mandatory Information section. + There is an amount on line 15 of Schedule MISLC.
Schedule MHP	

Schedule RAIL

Schedule TPD

SchMIRENT

Worksheet PROPST

Worksheets

Mississippi

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 71-661

Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Organizer | States | Mississippi | Installment Information | (SELECT) Installment agreement

Form 80-105

Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5

Form 80-106

Organizer | States | Add States/Cities | Mississippi | (SELECT) Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Tax Form View | States | Mississippi | Resident / Part-year / Nonresident | 80-106 - Payment Voucher | (POPULATE) Amount Paid + Organizer | E-file | Enable/Create | Spreadsheet | Mississippi | (UNSELECT) Column B Enable

Form 80-107

Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5

Form 80-108

Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Tax Form View | States | Mississippi | Resident / Part-year / Nonresident | 80-108 - Adjustments and Contributuins | (POPULATE) | Part I: Schedule A Line 9 and/or Part II: Schedule B Line 3 and/or Line 6 and/ or Part III: Vountary Contributions Total and/or Part IV: Income Line C and/or Part V: Schedule N Line 10

Form 80-115

Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Organizer | E-file | Enable/Create | Spreadsheet | Mississippi | (SELECT) Column B Enable

Form 80-155

Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Tax Form View | States | Mississippi | Net Operation Loss | 80-155 NOL Schedule | (POPULATE) Line 1 Total NOL available

Form 80-160

Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5.

Form 80-161

Form 80-205 Organizer | States | Add States/Cities | Mississippi | (SELECT) Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5

Form 80-315 Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Tax Form View | States | Mississippi | Resident / part-year / Nonresident | 80-315 - Reforestation Credit | (POPULATE) Line 10

Form 80-320 Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Organizer | States | Mississippi | Return Options | (UNSELECT) Suppress printing of Form 80-320 + Organizer | States | Mississippi | Penalties and Interest | (SELECT) Claiming exception OR Tax Form View | States | Mississippi | Resident / Part-year / Nonresident | 80-320 - Underpayment Penalty | (POPULATE) Line 18

Form 80-360 Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Tax Form View | States | Mississippi | Resident / Part-year / Nonresident | 80-360 - Catastrophe Savings Tax Schedule | (POPULATE) Line 7 and/or Line 11

Form 80-401 Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Tax Form View | States | Mississippi | Resident / Part-year / Nonresident | 80-401 - Income Tax Credit Summary | (POPULATE) Line 1 and/or Line 2

Form 80-491 Organizer | States | Add States/Cities | Mississippi | (SELECT) Resident, Part-year or Nonresident + Organizer | Payments and Extensions | Extensions | State Options and Payments (TAB) | Mississippi | (SELECT) Options 3, 4, or 5 + Organizer | General Information | Basic Return Information | Dependents | (FIVE OR MORE) Dependent Names

Missouri

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 5632 Total deposit amount must be populated.

Form MO-1040 (Amended) Check "Amended" box.

Form MO-1040 (Regular) Print is automatic when Missouri is activated.

Form MO-1040ES Batch E&E and estimate options are not "Alpha Only"; 1040 is required; Estimate option is not set to Estimate Equal to CY Overpayment.

Form MO-1040V Not available when e-filing Form MO-1040; Not suppressed; Payment amount is present on voucher; Balance due is greater than NONE.

Form MO-2210 Not suppressed; Line 29 is greater than NONE; Line 13 is greater than NONE; Total payments are less than the minimum required payment.

Form MO-5695 Worksheet for MO-A, Line 12	Line 12 must be populated for either taxpayer or spouse
Form MO-60	Batch E&E is selected or extension is selected.
Form MO-A	Total additions, taxpayer or spouse; total subtractions, taxpayer or spouse; line 12, itemized deductions present; total exemptions present.
Form MO-CR	Total resident credit on Form MO-1040, Step 4, line 29 is populated.
Form MO-CRP	Land lord name must be present; Line 9, Net rent paid must be populated.
Form MO-PTS	Household net income must be less than the net income limitation for a renter or homeowner.
Form MO-RET	This form does not print, efile only.
Form MO-TC	Total credit line 13 must be populated; taxpayer and/or spouse name must be present

SchMO5766

SchMOWFTC

WksMOQHIP

Missouri Cities: Kansas City

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form RD-108	Federal Sch F income taxable in Kansas City
Form RD-108B	Profit Sch CYZ activated
Form RD-109	Federal Sch C income taxable in Kansas City
Form RD-109NR	Federal Sch C income taxable in Kansas City; Non-resident or part year non-resident.
Form RD-111	Batch E&E selected; extension selected with a complete return.
Form RD-112	Batch E&E selected; extension selected with a complete return.

Missouri Cities: St. Louis

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form E-1	If balance due or refund.
Form E-1C	Line 6 has a credit amount
Form E-1R	If refund on line 7, refund due.
Form E-234	St Louis Return activated;
Form E-8	Batch E&E selected; Extension option C or D selected.

Montana

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 2	Montana is activated and not amended
Form 2 - Worksheet	No ND reciprocity
Form CC	No North Dakota reciprocity+ Schedule V, line 2 populated for taxpayer or spouse.
Form EST-I	Penalty is present on line 13 and line 28 is populated
Form ESW	Not amended; Tax worksheet line 12 less greater than \$500; not suppressed
Form EXT	Batch E&E activated; extension requested.
Form IT	Efile activated and amount due on Form 2 and not amended.
Form MTDE	
Form RCYL	Part IV line 3 is populated; Part III line 8 is populated.

Nebraska

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 1040N	Resident, non-resident or part-year return activated.
Form 1040N, Schedules I, II, & III	Sch I, Total adjustments increasing income; Total adjustents decreasing income; Sch II, credit for taxes paid to other states populated; Sch III, income apportionable to other states.
Form 1040N-ES	Estimate option is either blank, "C" or "D"
Form 1040N-MIL	Taxpayer approved to use form; Option selcted to make deduction for 7 years or all years;
Form 1040N-V	Balance due on the voucher;
Form 1040XN	Amended return is activated; elect to print with or without original Form 1040N
Form 1310N	Activate this schedule in Nebraska Organizer. Part I line a, B or C must be populated.
Form 2210N	Taxpayer is not farmer, fisherman or rancher; Penalty is due.
Form 2441N	Amount on line 10; Care provider names are present in Part 1, line 1.
Form 3800N	Line 12 Total nonrefundable credits is populated; line 16 Total refundable credits is populated; Col G total distributive credits is populated.
Form 3800N, Worksheet E	Amount present on Form 3800N, line 5
Form 3800N, Worksheet RD	Worksheet RD lines A, B, C and e-verified ID number are present.
Form 4868N	Batch E&E is selected; Any extension option is selected;
FORM CDN	

Form NOL	NE NOL incurred for current year lines 19 + 26, must be
Form PTC	
Schedule K-1N	Taxpayer is Nebraska resident; Part A or Part C has data; Pass-thru entity name field is populated.

New Hampshire

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form BET	"Generate a Business Enterprise Tax return" must be checked from Organizer Cities, Counties, Intangibles, Tangible NH BPT and BET General Information.
Form BET-80	Extension with tax return, alpha and numeric entries" is selected from Organizer Cities, Counties, Intangibles, Tangible NH BPT and BET Extension Options Line 11 must have data
Form BT-EXT	Batch Extension Alphanumeric is selected
Form BT-Summary	"IRS made adjustments to taxpayer's federal income tax return" must be selected from Organizer Cities, Counties, Intangibles, Tangible NH BPT and BET General Information.
Form DP-10	"Extension with tax return, alpha and numeric entries" is selected from Organizer NH Extension Information.
Form DP-10-ES	Extension option is "Not applicable" or "Extension with tax return, alpha and numeric entries" is selected from Organizer NH Extension Information. + Worksheet Lines 4 and 6 must be greater than 0
Form DP-2210/2220	Extension option is "Not applicable" or "Extension with tax return, alpha and numeric entries" is selected from Organizer NH Extension Information. +Worksheet Lines 4 and 6 must be greater than 0 + "Suppress penalty computation and do not print form" must not be checked from Organizer NH Penalties and interest.
Form DP-59-A	Batch Extension Alphanumeric is selected.
Form DP-80	Extension with tax return, alpha and numeric entries" is selected from Organizer Cities, Counties, Intangibles, Tangible NH BPT and BET Extension Options. + Line 5 must have data
Form NH 1040	Extension with tax return, alpha and numeric entries" is selected from Organizer Cities, Counties, Intangibles, Tangible NH BPT and BET Extension Options. + "Generate a Business Profits Tax return" must be checked from Organizer Cities, Counties, Intangibles, Tangible NH BPT and BET General Information.
Form NH 1040ES	"Extension with tax return, alpha and numeric entries" is selected from Organizer Cities, Counties, Intangibles, Tangible NH BPT and BET Extension Options.
Form NH ADDLINFO	
Form NH BET Worksheet	
Form NH DP2210	
Schedule IV	

New Jersey

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form GIT-DEP	All depreciation detail is not suppressed from Federal Organizer General Information Return and print Options Depreciation Options
Form NJ-1040	Residency status must be Resident or Part-year
Form NJ-1040-ES	Estimate option must be "Estimate with alphabetic-only information" from Organizer NJ Estimated Tax +does not have Batch Estimate selected +Extension has not been suppressed OR Amended print option has been sslected from Organizer NJ Amended Return OR Force print from Organizer NJ Estimated Tax Compute and print options section. + Suppress compute adn print has not been selected from Organizer NJ Estimated Tax Estimate Option section + "Estimate is not required" is not checked OR "Estimate equal to last year overpayment" is selected from Organizer NJ Estimated Tax Estimate Option section
Form NJ-1040NR	Residency status must be Nonresident
Form NJ-1040NR-V	E-file must be disabled +No direct debit data +Residency status must be nonresident +Must have payment amount
Form NJ-1040-O	"Print opt out form" must be checked from Organizer NJ E-file Additional Information E-file Opt Out section
Form NJ-1040V	E-file must be disabled +No direct debit data +Residency status must be resident or part-year +Must have payment amount
Form NJ-1040X	Amended print option has been selected from Organizer NJ Amended Return
Form NJ-2210	"Suppress penalty computation and do not print form" has not been selected from Organizer NJ Penalties and Interest Penalties and Interest Option to Compute and Print Underpayment Penalty section
Form NJ-2450	Line 4 must have data OR Line 5 must have data OR Line 6 must have data +Extension option is not suppressed
Form NJ-630	E-file extension is enabled + "Print efile signature authorization" selected from Organizer Common State + Batch extension has not been selected
Form NJ-8879	Extension or Amended must not be selected +Form NJ-8879 must be selected from Common State E-file +PIN must be used for signature authorization +E-file must be enabled
Form NJ-BUS-1	Residency status must be Resident or Part-year +Must have amount on Part I, II, III, or IV Line 4.
Form NJ-BUS-1 (NR)	Residency status must be Nonresident +Must have amount on Part I, II, III, or IV Line 4.
Form NJ-BUS-2	Must have amount on Part II Line 11 Column A
Form NJ-BUS-2 (NR)	Must have amount on Part II Line 11 Column A
NJ-2210NR	

NJW2

Schedule EZE

Schedules A, B, CBTk1 &
NJ1065K1Residency status must be selected +Extension has not been suppressed +Line 3
column B must have data OR Schedule B Line 4 must have data

SchNJCOJ

SchNJDOP

Worksheet A Reconciliation
of Schedule K-1

Worksheet has not been suppressed from Organizer | NJ | Return Options

Worksheet B Reconciliation
of Schedule K-1

Worksheet has not been suppressed from Organizer | NJ | Return Options

WorksheetC

New Mexico

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

41252

Form PIT 8453

E-file is enabled for the state

Form PIT-1

Residency status must be checked

Form PIT-110

PIT-110 Line 13 and Line 15 must have different amount and Residency Status must
be nonresident

Form PIT-ADJ

Line 5 total additions must have an amount OR Line 22 total deductions must
have an amount on PIT-ADJ

Form PIT-B

PIT-B page 1 Line 14 must be less than Line 13 OR Force print is checked from
Organizer | States | New Mexico | Return Options OR Form PIT-1 Page 1 Line 18a is
"B

Form PIT-CR

PIT-CR Line A total amount must be present

Form PIT-D

Form PIT-D Line 18 total contributions must have an amount

Form PIT-ES

Form prints if taxpayer and spouse are not deceased AND there is a total amount
to be paid on the estimated voucher AND the amount of estimated tax is not
below the \$1,000 threshold amount. Form will also print with batch estimates.

Form PIT-EXT

Extension option must be selected at Organizer | Payments and Extensions |
Extensions | State Options and Payments tab and voucher should have amount.

Form PIT-PV

PIT-PV not suppressed from Organizer | States | New Mexico | Return Options and
an amount on Form PIT-PV

Form PIT-RC

PIT-RC Line 25 must have amount

Form PIT-S

Number of Dependents must be more than 5

Form PIT-X

Amended return print option must be selected and mandatory information must
be selected from Organizer | States | New Mexico | Amended Return

Form PIT-Z	Must have an amount on PIT-Z
Schedule RPD-41096	Extension option must be selected at Organizer Payments and Extensions Extensions State Options and Payments tab OR Batch Extension is selected
Schedule RPD-41272	RPD-41272 Line 34 must have data OR underpayment option at Organizer States New Mexico Penalties and Interest must state to always print the form.
Schedule RPD-41285	NM state tax withheld must have data on tax form
Schedule RPD-41317	Line 3 must have data on tax form
Schedule RPD-41326	Line 3 must have data on tax form
Schedule RPD-41329	Line 3 must have data on tax form
Schedule RPD-41359	NM state tax withheld must have data on tax form
Schedule RPD-41369	NOL Worksheet must have amount on Line 9
Schedule RPD-41386	Line 3 must have data on tax form
TRD-41419	
TRD-41421	
TRD-41421	
TRD-41422	
TRD-41423	
TRD-41424	
TRD-41426	
TRD-41427	
Worksheet Child Care	Worksheet must have total amount on column G

New York

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form DTF-621	Must have data on Tax Forms States New York Resident/Part-year Resident/Nonresident Credit Forms DTF-621 - Claim for QETC Employment Cr Page 4 Line 27.
Form DTF-622	Must have data on Tax Forms States New York Resident Credit Forms DTF-622 - Claim for QETC Capital Tax Cr - line A or Line 1 or Line 4 or Line 20 or Line 21 or Line 27 or Line 30.
Form DTF-624	Must have data on Tax Forms States New York Resident Credit Forms DTF-624 - Claim for Low Income Housing Page 1 - Line 8
Form DTF-686	Must have data on Tax Forms States New York Resident DTF-686 - Tax Shelter Transactions -Line 1.
Form IT-1099-R	Must have data on Organizer Source Documents (W-2, 1099s, 1098) 1099-R NY Retirement 1099-R - Box 12 or Box associated with NY state or NYC or Yonkers.

Form IT-112-C	Must have data on Tax Form States New York Resident/Part-year Resident/Nonresident Credit Forms IT-112-C - Resident Tax Credit (Canada) Page 2 line 24.
Form IT-112-R	Must have data on Tax Form States New York Resident/Part-year Resident/Nonresident Credit Forms IT-112-R - Resident Tax Credit Page 2 line 24.
Form IT-119	Must have data on Tax Forms States New York Resident Credit Forms IT-119 - STAR Credit Advance Pymt Recon - line 3
Form IT-135	Must have data on Tax Forms States New York Resident IT-135 - Sales and Use Tax - line 2. Use Column A Detail link for data entry.
Form IT-182	Organizer States New York Passive Activities Form IT-182 Overrides - Print ooptions - Force print IT-182 OR Must have data on Tax Forms States New York Part-year Resident/Nonresident IT-182 - Passive Activity Loss Limit Page 1- line 4
Form IT-195	Must have data on Tax Forms States New York Resident IT-195 - Allocation of Refund - line 4
Form IT-196	
Form IT-2	Organizer Source Documents (W-2, 1099s, 1098) W-2 - has data entered on W-2
Form IT-201	Must have the New York State activated in Organizer States Add States/Cities and residency is selected as New York Resident
Form IT-201-ATT	Must have data on Tax Forms States New York Resident IT-201-ATT - Other Taxes and Credits - Line 2 or 7 or 10 or 13 or 18 or 21 or 30 or 34.
Form IT-201-D	Must have data on Tax Forms States New York Resident IT-201 - Income Tax Return Page 2 line 34, Itemized deduction check box.
Form IT-201-V	Must have data on Tax Forms States New York Resident IT-201-V - Payment Voucher - Payment amount + Organizer States New York Return Options - Supress print of Form IT-201-V is not checked + Organizer States Common State Bank Information - Authorized to Debit Fund is not checked.
Form IT-201-X	Organizer States New York IT-204-LL Filing Fee Payment Form Return Options - Print form IT-204LL only is not checked + Organizer States New York Amended Return - Original Tax Data (Mandatory) - Appropriate option is selected.
Form IT-203	Must have the New York State activated in Organizer States Add States/Cities and residency is selected as New York Part-year Resident or Nonresident.
Form IT-203-A	Organizer States New York Non-Calculating Forms IT-203-A - Business name must present
Form IT-203-ATT	Must have data on Tax Forms States New York Part-year Resident/Nonresident IT-203-ATT - Other Taxes and Credits - Line 8 OR Line 17 OR Line 33.
Form IT-203-B	Must have data on Tax Forms States New York Part-year Resident/Nonresident IT-203-B - Wage Alloc/College Tuition Page 1- Line 1o OR Schedule B 1st street address is present OR Tax Forms States New York Part-year Resident/Nonresident IT-203-B - Wage Alloc/College Tuition Page 2 - Schedule C line 2

Form IT-203-C	Organizer States New York Part-year/Nonresident Allocation Part-year/Nonresident Allocation - To Generate IT-203-C Indicate Who Had NY Source Income is selected.
Form IT-203-D	Must have data on Tax Forms States New York Resident IT-203 - Income Tax Return Page 2 line 33, Itemized deduction check box.
Form IT-203-F	Organizer States New York Multi-Year Allocation for NR/PY Income Attributable to Past Employment - Income Attributable to past Employment is present OR Organizer States New York Multi-Year Allocation for NR/PY Stock Options - Stock Option detail is present
Form IT-203-X	Organizer States New York IT-204-LL Filing Fee Payment Form Return Options - Print form IT-204LL only is not checked + Organizer States New York Amended Return - Original Tax Data (Mandatory) - Appropriate option is selected.
Form IT-204-LL	Organizer States New York IT-204-LL Filing Fee Payment Form EIN of filing entity - Ownership of the Return (Mandatory) is selected + Organizer States New York IT-204-LL Filing Fee Payment Form Return Options - Print is not suppressed.
Form IT-209	Must have data on Tax Forms States New York Resident Credit Forms IT-209 - Noncustodial Parent EIC - line 32 OR line 42 OR line 43 OR line 45
Form IT-2105, ES Tax Worksheet	Estimate option must be "Estimate with alphabetic-only information" from Organizer NY Estimated Tax +does not have Batch Estimate selected +Extension has not been suppressed OR Amended print option has been sslected from Organizer NY Amended Return + Suppress compute and print has not been selected from Organizer NY Estimated Tax Estimate Option section + "Estimate is not required" is not checked OR "Estimate equal to last year overpayment" is selected from Organizer NY Estimated Tax Estimate Option section + Organizer States New York IT-204-LL Filing Fee Payment Form Return Options - Print form IT-204LL only is not checked
Form IT-2105, Vouchers 1-4	Estimate option must be "Estimate with alphabetic-only information" from Organizer NY Estimated Tax +does not have Batch Estimate selected +Extension has not been suppressed OR Amended print option has been sslected from Organizer NY Amended Return + Suppress compute and print has not been selected from Organizer NY Estimated Tax Estimate Option section + "Estimate is not required" is not checked OR "Estimate equal to last year overpayment" is selected from Organizer NY Estimated Tax Estimate Option section + Organizer States New York IT-204-LL Filing Fee Payment Form Return Options - Print form IT-204LL only is not checked
Form IT-2105.9	"Suppress penalty computation and do not print form" has not been selected from Organizer New York Penalties and Interest Penalties and Interest Option to Compute and Print Underpayment Penalty section OR Tax Forms States New York Resident IT-2105.9 - Underpayment Penalty - line 14 is greater than or equal to line 17
Form IT-212	Must have data on Tax Forms States New York Resident Credit Forms IT-212 - Investment Credit - line 14 OR line 15a OR line 15b or Line 21
Form IT-213	Must have data on Tax Forms States New York Resident Credit Forms IT-213 - Empire State Child Credit - line 16

Form IT-213-ATT	Must have data on Tax Forms States New York Resident Credit Forms IT-213 - Empire State Child Credit - line 16 + number of children is more than 6 on step 3
Form IT-214	Organizer States New York Credits Real Property Tax Credit - Print and Residence Information - Force print IT-214 is checked OR Tax Forms States New York Resident Credit Forms IT-214 - Real Property Tax Credit Page 3 - line 33 has data
Form IT-215	Organizer States New York Credits Earned Income Credit - General Information - Force print IT-215 is checked OR Must have data on Tax Forms States New York Resident Credit Forms IT-215 - Earned Income Credit - Line 12 OR line 16 OR line 17 OR line 26.
Form IT-216	Must have data on Tax Forms States New York Resident Credit Forms IT-216 - Child/Dependent Care Credit - Line 11 OR line 14 OR line 22
Form IT-217	Must have data on Tax Forms States New York Resident Credit Forms IT-217 - Farmers School Tax Credit - line 19 OR Organizer States New York Credits Farmers School Tax Credit - General Information - Force print Form IT-217
Form IT-219	Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York Cities NYC, Yonkers Resident - New York City Resident Tax is checked OR Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York Cities NYC Part-yr resident - Residency information is selected for Taxpayer or Spouse +Organizer States New York Credits Credit for NYC UBT Credit for NYC UBT - General Information - Force print form IT-219 is checked +Filing status (Mandatory) is selected and/or spouse filing status (Mandatory) is selected +Must have data on Tax Forms States New York Resident Credit Forms IT-219 - NY City UBT Credit - line 11 or line 16.
Form IT-221	Organizer States New York Disability Income Exclusion - Add new disability income exclusion +Must have data on Tax Forms States New York Resident IT-221 - Disability Income Exclusion New Page 1 - line 10
Form IT-222	Must have data on Tax Forms States New York Resident Credit Forms IT-222 - General Corporation Tax Credit - line 11
Form IT-223	Organizer States New York Credits IT-223 Innovation Hot Spot Deduction Income or Gain Attributable to Hot Spot column must have an amount
Form IT-225	Tax Form States New York IT-225 Line 9 or Line 18 must be populated
Form IT-226	Must have data on line 9
Form IT-228	Must have data on line 18.
Form IT-229	
Form IT-230	Must have data on Tax Forms States New York Resident IT-230 - Tax on Lump-Sum Dist Taxpayer - line 1 OR line 3 OR line 24 - New York State column or New York City column
Form IT-236	Must have data on Tax Forms IT-236 Page 2 Part 5 Line 14 - Total credit
Form IT-238	Must have data on Tax Forms States New York Resident Credit Forms IT-238 - Claim for Rehabilitation of Hi - line 12 OR line 28

Form IT-241	Must have data on Tax Forms IT-241 Page 2 Part 5 Line 10 - Total clean heating fuel credit
Form IT-242	Must have data on Tax Forms IT-242 Page 2 Part 5 Line 10
Form IT-245	Must have data on Tax Forms States New York Resident Credit Forms IT-245 - Volunteer Firefighters Credit - line 4
Form IT-249	Must have data on Tax Forms IT-249 Page 2 Schedule E Line 11 - Total credit available for the current year
Form IT-252	Must have data on Tax Forms States New York Resident Credit Forms IT-252 - Investment Tax Cr for Financia - line 11 OR line 12
Form IT-252-ATT	Must have data on Tax Forms States New York Resident Credit Forms IT-252-ATT - Employee Incentive Credit - line 7
Form IT-255	Must have data on Tax Forms States New York Resident Credit Forms IT-255 - Claim for Solar Credit - line 3
Form IT-256	Must have data on Tax Forms IT-256 Page 2 Part 5 Line 9 - Credit for the current tax year
Form IT-257	Must have data on Tax Forms States New York Resident Credit Forms IT-257 - Claim of Right Credit - line 6 OR line 9 OR line 12 OR line 15 OR line 18 OR line 21
Form IT-258	Must have data on Tax Forms States New York Resident Credit Forms IT-258 - Claim of Nursing Home - line 1
Form IT-261	
Form IT-267	
Form IT-272	Tax Forms States New York Resident Credit Forms IT-272 - College Tuition Credit Page 1 - line 1 is checked No and line 2 is checked Yes
Form IT-280	Organizer States New York Nonobligated Spouse Allocation - Selection is made on "To Generate Form IT-280 Select Who is Nonobligated Spouse"
Form IT-370	Batch Extension is not selected + Organizer States New York IT-204-LL Filing Fee Payment Form Return Options - Print form IT-204LL only is not checked + Must have the New York State activated in Organizer States Add States/Cities and residency is selected + Organizer Payments and Extensions Extensions State Options and Payments - Option 1 , 2, 3 OR 4 is selected.
Form IT-398	Must have data in Tax Forms States New York IT-398 Part 1 hyperlink "Depreciation Detail" Under Form IT-398 State depreciation OR have date on Tax Forms States New York IT-398 Part 2 hyperlink "Disposition Detail" The difference between the amount of NY Depreciation and Federal Depreciation
Form IT-399	Must have data in Tax Forms States New York IT-399 Part 1 hyperlink "Depreciation Detail" Under Form IT-399 State depreciation OR have date on Tax Forms States New York IT-399 Part 2 hyperlink "Disposition Detail" The difference between the amount of NY Depreciation and Federal Depreciation.
Form IT-558	

Form IT-601	Must have data on Tax Forms States New York Resident Credit Forms IT-601 - ZEA and Ez Wage Tax Credit - line 8 OR 9
Form IT-603	Must have data on Tax Form IT-603 page 3 Schedule F Line 18 Net EZ-ITC and EZ-EIC available for use or Line 19 Net EZ-ITC recapture amount
Form IT-604	Must complete either Section 1 or Section 2. +If completing Section 1, a date must be entered on Tax Form IT-604 Section 1 and Line 3 and Line 6 question must be answered Yes. +If completing Section 2, a date must be entered on Page 5 and Line 36 and 39 must be answered Yes
Form IT-606	Must complete either Section 1 or Section 2. +If completing Section 1, a date must be entered on Tax Form IT-606 Section 1 and Line 3 and Line 6 question must be answered Yes. +If completing Section 2, a date must be entered on Page 5 and Line 27 and 30 must be answered Yes
Form IT-607	
Form IT-611	Must have answered item A Yes on Tax Forms IT-611 Page 1 OR have data entered on Page 4 Schedule G Line 40
Form IT-611.1	Must have answered item A Yes on Tax Forms IT-611.1 Page 1 OR have data entered on Page 4 Schedule G Line 40
Form IT-611.2	Must have answered item A Yes on Tax Forms IT-611.2 Page 1
Form IT-612	Must have data on Tax Forms IT-612 Schedule B Line 1
Form IT-635	Must have data on Tax Forms IT-635 Schedule A Line 1
Form IT-639	Must have data on Tax Forms IT-639 Page 4 Schedule D Line 18
Form IT-641	Must have data on Tax Form IT-641 Page 3 Schedule D Line 11 or Schedule E Line 15
Form IT-649	
Form IT-649	
Form IT-653	
Form IT-654	
Form IT-657	
Form IT-658	
Form IT-660	
Form IT-661ATT	
Form IT-662	
Form TR-579.1-IT	Batch Extension is not selected +Organizer States New York E-file Additional Information - Extension signature authorization - Person Electronically Filing Extension is selected and ERO certification is checked + Organizer Payments and Extensions Extensions State Options and Payments - Option 1 , 2, 3 OR 4 is selected +Organizer States Common State Bank Information Extension (tab) - Authorization to Debit Fund is checked.

Form TR-579-IT	NY e-file is enabled at Organizer E-file Enable/Create +Organizer Payments and Extensions Extensions State Options and Payments - Option 1 OR 2, is not selected
Form TR-579-PT	Organizer States New York IT-204-LL Filing Fee Payment Form EIN of filing entity - Ownership of the Return (Mandatory) is selected + Organizer States New York IT-204-LL Filing Fee Payment Form Return Options - Print is not suppressed +E-file is enabled for NY 204-LL at Organizer E-file Enable/Create
From IT-196	
From IT-647	
IT-227	Must have data on Part 2, line 1

New York Cities: New York City

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form IT-360.1	Organizer States Add States/Cities New York Resident, Non-resident, or Part-year is selected + Organizer Payments and Extensions Extensions State Options and Payments New York Option 1/2 (extension only) is NOT selected + Organizer States New York IT-204-LL Filing Fee Payment Form Return Options Print Form(s) IT-204-LL only is NOT selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York Cities NYC Part-yr resident Taxpayer/Joint Residency New York City part-year resident selected OR Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York Cities Yonkers Part-yr res. Residency Yonkers part-year resident is selected OR Both options above is selected
Form NYC-208	Organizer States Add States/Cities New York Resident is selected + Organizer Payments and Extensions Extensions State Options and Payments New York Option 1/2 (extension only) is NOT selected + Organizer States New York IT-204-LL Filing Fee Payment Form Return Options Print Form(s) IT-204-LL only is NOT selected + Tax Forms States New York Resident Credit Forms NYC-208 - NYC Real Property Tax Credit Page 3 line 29 has an amount OR Organizer States New York Credits Real Property Tax Credit 'Force print Form NYC-208, even if no credit exists' is selected.

New York Cities: New York City UBT

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form NYC - NOLD-UBTI	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B Net Operating Loss Add new Net Operating Loss Date At least one entry and amount of NOL exists
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Form NYC-200V	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B Return Options Suppress print for NYC-200V is NOT selected + Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B NYC - 200V - Payment Voucher Payment amount enclosed is greater than 0.
Form NYC-202	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected
Form NYC-221	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT Taxpayer NYC-221 - Penalty on Underpayment Page 2 line 31 has an amount AND Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT Taxpayer Penalties and Interest Option to compute and print underpayment penalty Suppress penalty computation and do not print form is NOT selected.
Form NYC-399	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B NYC-399 - Depreciation Adjustments Sch C Line 8 column A or B has an amount AND Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B NYC-399 - Depreciation Adjustments Sch A Line 1 column D, E, F, or I has an amount
Form NYC-399Z	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B Depreciation Information 'Suppress print of form NYC-399Z' is NOT selected + Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B NYC-399Z - Depreciation Adjustments Page 2 Sch C Line 8 column A or B has an amount

Form NYC-579-UBTI	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + E-file is enabled for either the return or the extension + Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B NYC-579-UBTI - a checkbox is filled out on Part A OR Force print is selected at Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B E-file Additional Information.
Form NYC-5UBTI	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B Estimated Tax Estimate Option 'Suppress compute and print' is NOT selected AND Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B NYC-5UBTI - Estimated Tax Estimated Tax Voucher 1-4 Estimated Tax Worksheet Line 6 is greater than 0
Form NYC-EXT	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B General Information Ownership (Mandatory) Taxpayer or Spouse is selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York UBT NYC-202 A/B Extension Information Extension Option Option 1, 2, 3, or 4 is selected.

New York Cities: Yonkers

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form Y-203	Organizer States Add States/Cities New York Resident, Part-year, or Non-resident is selected + Organizer Payments and Extensions Extensions State Options and Payments New York Option 1/2 (extension only) is NOT selected + Organizer Cities, Counties, Intangibles, Tangible New York Cities and UBT New York Cities Yonkers Nonresident Residency 'City of Yonkers nonresident' is selected + Tax Forms Cities, Counties, Intangibles, Tangible New York Cities and UBT New York Cities Y-203-Yonkers Nonresident Tax Taxpayer Page 1 line 6 has an amount.

North Carolina

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form D-400	No condition
Form D-400 Schedule A:	
Form D-400 Schedule PN-1	
Form D-400TC	Amount must be present from Tax Form North Carolina D-400 Page 2 Line 16.

Form D-400V	E-file must be disabled. +Pay this amount must be present from Tax Form North Carolina D-400 Page 2 Line 27. +Suppress print for Form D-400V must not be checked. +Amended return box is unchecked from Organizer North Carolina Amended Return.
Form D-400V Amended	Amended return box is checked from Organizer North Carolina Amended Return. +Pay this amount must be present from Tax Form North Carolina D-400 Page 2 Line 27.
Form D-410	E-file extension must be disabled +Generate Only Batch Extensions is checked from Organizer Payments and Extensions Package OR Extension option is checked from Organizer North Carolina Extension Information.
Form D-422	No condition
Form D-422A	Compute tax on current year annualized income using overrides entered belowCompute tax on current year annualized income using overrides entered below" is checked from Organizer NC Penalties and Interest Annualization + not Short Method.
Form NC-40	Extension with tax return, alpha and numeric" OR "Extension with tax return, alpha only" must be selected from Organizer NC Extension Information OR Extension Option is selected as "Not applicable" from Organizer NC Extension Information + E-file is not enabled for estimated payments
Form NC-478, Pass-Through Schedule	Must have FEIN
Form NC-478, Summary	Amount on page 2 line 43 OR Amount on page 2 line 19
Form NC-478G	Name of Business must be present + Amount on line 17
Form NC-EDU	Amount of contribution must be present
Form NCNOL	
Schedule AM	Amended return box is checked from Organizer North Carolina Amended Return
Schedule PN	Taxpayer is nonresident OR Spouse is nonresident OR Taxpayer is part-year resident OR Spouse is part-year resident
Schedule S	Amount on Part A Line 6 OR Amount on Part B Line 14 OR Form D-400 Line 11 itemized

North Dakota

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form ND-1	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota.
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Form ND-1 ES	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + Organizer States Common States Estimates, Option 4 for North Dakota, or an amount on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident ND-1ES - Estimated Tax Worksheet, Line 14
Form ND-1 EXT	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 1, 2, 3, or 4 for North Dakota
Form ND-1 UT	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + Positive amount on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident ND-1UT-Uderpayment Penalty, Line 17
Form ND-1CR	/* Organizer States Add States/Cities, Option "R" or "PY" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + Amount on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident ND-1CR - Credit for Taxes Paid, Line 7 or 11 + */ There may be an issue for the printing of this form, for a necessary printing condition leads to a field that is unmapped.
Form ND-1NR	Organizer States Add States/Cities, Option "PY" or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota or Organizer States Add States/Cities, Option "R" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + Organizer States North Dakota part-year/Nonresident Allocation Part-year/Nonresident Allocation, Taxpayer/Spouse Residency Status block, Option "Taxpayer and spouse are both nonresidents and NOT check Tax Forms States North Dakota Resident or Part-year Resident/Nonresident ND-1 - Income Tax Return Page 1, MN/MT Reciprocity
Form ND-1PRV	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + An amount on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident ND-1PRV Paper Return Payment Voucher, "Amount of Payment + NOT check "AUTHORIZATION TO DEBIT FUNDS" on Organizer States Common State Bank Information.
Form ND-1V	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + "ENABLE" North Dakota on Organizer E-file Enable/Create Return tab + An amount on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident ND-1V - E-file Payment Voucher, "Amount of Payment + NOT check "AUTHORIZATION TO DEBIT FUNDS" on Organizer States Common State Bank Information

Schedule FC	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + Data on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident Sch ND-1FC - Family Member Care Tax Credit, Line D "Name of qualifying family member" & Line 11 "Tentative family member care credit"
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Schedule MCP

Schedule ME

Schedule ND1AC

Schedule ND-1FA

Schedule ND1FC

Schedule ND1PG

Schedule ND1PSC

Schedule ND1QEC

Schedule ND-1SA	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + Amount on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident Sch ND-1SA - Statutory Adjustments, Line 6.
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Schedule ND-1TC	Organizer States Add States/Cities, Option "R", "PY", or "NR" for North Dakota + Organizer Payments and Extensions Extensions State Options and Payments, Option 3, 4 and 5 for North Dakota + Amount on Tax Forms States North Dakota Resident or Part-year Resident/Nonresident Sch ND-1TC - Tax Credits, Page 2, Line 23
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Schedule NDK-1	NA
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Schedule RZ

Worksheet
CapitalGainExclusionWorksheet
MarriagePenaltyCredit

Ohio

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Form/Schedule

Requirement(s) to Print

Business Income Schedule	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio Information Notice (UNSELECT) Generate Form IT-10 + Tax Form View States Ohio IT-BUS Line 9 All business income (EXISTS).
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Form IT-10	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio Information Notice (SELECT) Generate Form IT-10.
Form IT-1040	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio Information Notice (UNSELECT) Generate Form IT-10.
Form IT-1040ES	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer States Ohio Estimated Tax Compute and Print Options (UNSELECT) Suppress.
Form IT-2210	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio Penalties and Interest Underpayment of Estimated Tax Option to Compute and Print Underpayment Penalty (UNSELECT) Suppress penalty computaion and do not print form + Tax Form View States Ohio IT-2210 - Underpayment Penalty Page 2 Line 8 Total interest penalty due (EXISTS).
Form IT-40P	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5.
Form IT-40XP	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5.
Form IT-DA	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio Affidavit of Non-Ohio Residency/Domicile (SELECT) Generate Form IT DA.
Form IT-NRC	Organizer States Add States/Cities Ohio (SELECT) Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5
Form IT-NRS	
Form IT-RC	
Form IT-RE	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer States Ohio Amended Return Amended Return (SELECT) Amended Return
Form IT-Waiver	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio E-file Additional Information E-file Opt Out (SELECT) Print opt out form
Form IT-WH	

Schedule of Adjustments	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio Information Notice (UNSELECT) Generate Form IT-10
Schedule of Credits	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Organizer States Ohio Information Notice (UNSELECT) Generate Form IT-10
Schedule of Dependents	Organizer States Add States/Cities Ohio (SELECT) Resident, Part-year or Nonresident + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Ohio (SELECT) Options 3, 4, or 5 + Tax Form View States Ohio Sch J - Dependent Information First Name and SSN (EXIST)

Ohio Cities: Akron

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule	Requirement(s) to Print
Estimated Tax Vouchers 1-4	Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School Districts Ohio, Akron General Information Residency Status (SELECT) Resident or Nonresident
Form IR	Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School Districts Ohio, Akron General Information Residency Status (SELECT) Resident or Nonresident

Ohio Cities: Columbus

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule	Requirement(s) to Print
Form IR-18	Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio, Columbus General Information General Information City (SELECT) Columbus + Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio, Columbus Estimated Tax Compute and Print Option (UNSELECT) Suppress + Tax Form View Cities, Counties, Intangibles, Tangible Ohio Cities and School Districts Columbus IR - 21 - Estimated Tax Estimated Work Paper (EXISTS) Grand Total
Form IR-21	Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio, Columbus General Information General Information City (SELECT) Columbus + Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio, Columbus Estimated Tax Compute and Print Option (UNSELECT) Suppress + Tax Form View Cities, Counties, Intangibles, Tangible Ohio Cities and School Districts Columbus IR - 21 - Estimated Tax Estimated Work Paper (EXISTS) Grand Total
Form IR-25	Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio, Columbus General Information General Information City (SELECT) Columbus

Ohio Cities: Ohio CCA

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Form/Schedule	Requirement(s) to Print
Form 120-16-EC	Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio CCA General Informamtion Residency Information (SELECT) Resident city + Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio CCA General Informamtion Exemption Cerificate (SELECT) Qualify exemption
Form 120-16-IR	Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio CCA General Informamtion Residency Information (SELECT) Resident city

Ohio Cities: Ohio Municipal (Cincinnati, Dayton, Lorain)

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Estimated Tax Declaration Vouchers 1-4	Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio Municipal Add Ohio City (SELECT) City Name + Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio Municipal (CITY) Estimated Tax Compute and Print Options (UNSELECT) Suppress
Form R: Ohio Municipal Income Tax Return	Organizer Cities, Counties, Intangibles, Tangibles Ohio Cities and School Districts Ohio Municipal Add Ohio City (SELECT) City Name

Ohio Cities: Ohio RITA

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form 37	Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School District Ohio, RITA General Information Residece City (SELECT) Compute RITA return + Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School District Ohio, RITA General Information Declaration of Exemption to File RITA return (UNSELECT) Dropdown + Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School District Ohio, RITA Extension Information Extension Information Extension Option (SELECT) with tax return or Not applicable
Form 37 Residence Time Slice	
Form EXTEN	Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School District Ohio, RITA General Information Residece City (SELECT) Compute RITA return + Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School District Ohio, RITA General Information Declaration of Exemption to File RITA return (UNSELECT) Dropdown + Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School District Ohio, RITA Extension Information Extension Information Extension Option (UNSELECT) Not applicable
Individual Declaration of Exemption	Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School District Ohio, RITA General Information Declaration of Exemption to File RITA return (SELECT) Dropdown

Schedules J and K

Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School District | Ohio, RITA | General Information | Residence City | (SELECT) Compute RITA return + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School District | Ohio, RITA | General Information | Declaration of Exemption to File RITA return | (UNSELECT) Dropdown + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School District | Ohio, RITA | Extension Information | Extension Information | Extension Option | (SELECT) with tax return or Not applicable

Ohio Cities: Ohio School District

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form SD-100

Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | (ENTER) School District Number + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | General Information | Residency Information | Primary Taxpayer | (SELECT) Resident, Nonresident, Part-year resident

Form SD-100ES

Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | (ENTER) School District Number + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | General Information | Residency Information | Primary Taxpayer | (SELECT) Resident, Nonresident, Part-year resident

Form SD-40P

Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | (ENTER) School District Number + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | General Information | Residency Information | Primary Taxpayer | (SELECT) Resident, Nonresident, Part-year resident + Tax From View | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | School District | (District Number) | SD-40P - Payment Voucher | (EXIST) Amount of Payment OR + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | Extension | Extension Information | Extension Option | (UNSELECT) Not Applicable + Tax From View | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | School District | (District Number) | SD-40P - Payment Voucher - Extension | (EXIST) Amount of Payment

Form SD-40XP

Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | (ENTER) School District Number + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | General Information | Residency Information | Primary Taxpayer | (SELECT) Resident, Nonresident, Part-year resident + Organizer | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | Ohio School District | Amended Return | (SELECT) Amended Return + Tax From View | Cities, Counties, Intangibles, Tangible | Ohio Cities and School Districts | School District | (District Number) | Amended Return | SD-40XP (TAB) | (EXIST) Amount of Payment

Form SD-RE	Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School Districts Ohio School District (ENTER) School District Number + Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School Districts Ohio School District General Information Residency Information Primary Taxpayer (SELECT) Resident, Nonresident, Part-year resident + Organizer Cities, Counties, Intangibles, Tangible Ohio Cities and School Districts Ohio School District Amended Return (SELECT) Amended Return
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Form SD-WH

Oklahoma

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

Form 500A

Form 500B

Form 504

Organizer | States | Add States/Cities - An option for Oklahoma State Residency must be selected. + Organizer | Payments and Extensions | Extensions | State Options and Payments - Enable extension for Oklahoma.

Form 511

The following conditions must be met: 1. Organizer | States | Add States/Cities - "R" for State Residency must be selected. 2. Pages 3 - 5 can also be forced to print by navigating to: Organizer | States | Oklahoma | Return Options | Print Options.

Form 511CR

The following conditions must be met: 1. Organizer | States | Add States/Cities - "R" for State Residency must be selected. 2. You have an Oklahoma filing requirement. This form can also be forced to print by navigating to: Organizer | States | Oklahoma | Return Options | Print Options.

Form 511CS

Not supported

Form 511EF

The following conditions must be met: 1. Organizer | States | Add States/Cities - An option for State Residency must be selected. 2. Organizer | E-file | Enable/Create - Federal EFIN must be entered 3. Organizer | E-file | Enable/Create - Enable e-filing for Oklahoma.

Form 511EIC

Form 511NR

The following conditions must be met: 1. Organizer | States | Add States/Cities - "PY" or "NR" for State Residency must be selected. Pages 3 - 5 can also be forced to print by navigating to: Organizer | States | Oklahoma | Return Options | Print Options.

Form 511TX

The following conditions must be met: 1. Organizer | States | Add States/Cities - "R" or "PY" for State Residency must be selected. 2. Oklahoma Form 511TX, Line 7 must have a value.

Form 511-V

The following conditions must be met: 1. Organizer | States | Add States/Cities - An option for State Residency must be selected. 2. Organizer | E-file | Enable/Create - Enable e-filing for Oklahoma 3. Organizer | States | Common State | Bank Information - an amount to be debited must be entered.

Form 511W	The following conditions must be met: 1. Organizer States Add States/Cities - An option for State Residency must be selected. 2. Organizer Source Documents (W-2, 1099s, 1098) W-2 OK W2 Wage State Alloc. - Oklahoma must be selected.
Form 538-H	The following conditions must be met: 1. Organizer States Add States/Cities - "R" for State Residency must be selected. 2. The qualifications are met for the Form 538-H Claim for Credit or Refund of Property Tax Part 1: Qualification Questions 3. There is an amount on Form 538-H, Line 14. This represents Total Gross Household Income. This form can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options
Form 538-S	The following conditions must be met: 1. Organizer States Add States/Cities - "R" for State Residency must be selected. 2. There is an amount on Form 538-S, Line 15. This represents Total Qualified Exemptions Claimed. This form can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options
Form 561	
Form 561-NR	
Form 564	
Form 566	
Form 573	The following conditions must be met: 1. Organizer States Add States/Cities - An option for State Residency must be selected. 2. Form 573, Line 22 must have a value. This represents the current year Farm Income Averaging. This form can also be forced to print by navigating to: Organizer States Oklahoma Farm Income Averaging
Form 576	The following conditions must be met: 1. Organizer States Add States/Cities - "R" for State Residency must be selected. 2. Form 576 must have an amount for the year the credit was generated. 3. Form 576 must have an amount for the Refundable Credit Available for the current tax year.
Form 577	The following conditions must be met: 1. Organizer States Add States/Cities - An option for State Residency must be selected. 2. Navigate to: Organizer States Oklahoma Credits Refundable Coal Credit - an activity must be entered, and all information filled out. 3. Form 577, Line 5 must be greater than zero.
Form 578	The following conditions must be met: 1. Organizer States Add States/Cities - An option for State Residency must be selected. 2. Navigate to: Organizer States Oklahoma Credits Refundable Credit for Electricity - an activity must be entered, and all information filled out. 3. Form 578, Line 5 must be greater than zero.
Form 584	
Form 591-D	
Form 592	

Form OW-8-ES	Organizer States Add States/Cities - An option for State Residency must be selected. + Organizer Payments and Extensions Extensions State Options and Payments Virginia option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable
Form OW-8-P	Organizer States Add States/Cities - An option for State Residency must be selected. + Organizer States Oklahoma Penalties and Interest Penalties and Interest Option to Compute and Print Underpayment Penalty: -The option to Add penalty to tax and print form, if required or a penalty is due (Default) is selected, AND Prior year tax liability is not equal to NONE. OR -The option for Always print form, but do not add penalty is selected. OR -The option for Always print form, and add penalty is selected.
Schedules 511-A, B, and C	Organizer States Add States/Cities - "R" for State Residency must be selected. AND one of the following: -Schedule 511-A, Line 15 must have a value. This amount represents Total Subtractions. OR -Schedule 511-B, Line 8 must have a value. This amount represents Total Additions. OR -Schedule 511-C, Line 7 must have a value. This amount represents Total Adjustments. Page 3 can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options
Schedules 511-D, E, and F	Organizer States Add States/Cities - "PY" or "NR" for State Residency must be selected. + Tax Forms States Oklahoma Part-year Resident/Nonresident 511NR - Income Tax Return Page 1 Not Required to File must be blank AND one of the following: Schedule 511NR-D, Line 2 must have a value. This amount represents Federal Child Care Credit. OR Schedule 511NR-D, Line 2 must have a value. This amount represents Federal Child Tax Credit. OR Schedule 511NR-E, Line 2 must have a value. This amount represents Federal Earned Income Credit. Page 3 can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options
Schedules 511-G	The following conditions must be met: 1. Organizer States Add States/Cities - "R" for State Residency must be selected. 2. Schedule 511-G, Line 5 must have a value. This amount represents Total Donations. Page 5 can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options
Schedules 511NR-1 and A	The following conditions must be met: 1. Organizer States Add States/Cities - "PY" or "NR" for State Residency must be selected. 2. Tax Forms States Oklahoma Part-year Resident/Nonresident 511NR - Income Tax Return Page 1 Not Required to File must be blank AND 3. Schedule 511NR-A, Line 7 (Federal Amount) must have a value. This amount represents Total Federal Additions. OR 4. Schedule 511NR-A, Line 7 (Oklahoma Amount) must have a value. This amount represents Total Oklahoma Additions. Page 3 can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options

Schedules 511NR-B and C	The following conditions must be met: 1. Organizer States Add States/Cities - "PY" or "NR" for State Residency must be selected. 2. Tax Forms States Oklahoma Part-year Resident/Nonresident 511NR - Income Tax Return Page 1 Not Required to File must be blank AND 3. Schedule 511NR-B, Line 16 (Federal Amount) must have a value. This amount represents Total Federal Subtractions. OR 4. Schedule 511NR-B, Line 16 (Oklahoma Amount) must have a value. This amount represents Total Oklahoma Subtractions. OR 5. Schedule 511NR-C, Line 7 must have a value. This amount represents Total Adjustments. Page 3 can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options.
Schedules 511NR-D and E	The following conditions must be met: 1. Organizer States Add States/Cities - "PY" or "NR" for State Residency must be selected. 2. Tax Forms States Oklahoma Part-year Resident/Nonresident 511NR - Income Tax Return Page 1 Not Required to File must be blank AND 3. Schedule 511NR-D, Line 2 must have a value. This amount represents Federal Child Care Credit. OR 4. Schedule 511NR-D, Line 2 must have a value. This amount represents Federal Child Tax Credit. OR 5. Schedule 511NR-E, Line 2 must have a value. This amount represents Federal Earned Income Credit. Page 3 can also be forced to print by navigating to: Organizer States Oklahoma Return Options Print Options.
Schedules 511NR-F	The following conditions must be met: 1. Organizer States Add States/Cities - "PY" or "NR" for State Residency must be selected. 2. Tax Forms States Oklahoma Part-year Resident/Nonresident 511NR - Income Tax Return Page 1 Not Required to File must be blank 3. Schedule 511NR-F, Line 9 must have a value. This amount represents Total Donations.

Oregon

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
FIA-40/40N/40P	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon + Tax Forms States Oregon Resident 40 – Income Tax Return Page 2 tab Line 22a OR Tax Forms States Oregon Part-Year Resident 40P – Income Tax Return Form 40P, pg 3 tab Line 46a OR Tax Forms States Oregon Nonresident 40N – Income Tax Return Page 3 tab Line 48a.
Form 40-ESV	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon + Organizer States Oregon Estimated Tax Estimate Option Suppress Compute and Print is NOT selected + Organizer States Oregon Estimated Tax Estimate Option Suppress Estimate equal to current year overpayment is NOT selected + Organizer States Oregon Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is NOT selected OR [Organizer States Oregon Estimated Tax Estimate Option Suppress print if estimated tax is less than threshold is Selected OR Batch Estimate is Alpha Only + Organizer Payments and Extensions Extensions State Options and Payments Oregon option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable.

Form OR-10	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon +Tax Forms States Oregon Resident 40 – Income Tax Return Page 3 tab Line 42a OR Tax Forms States Oregon Part-Year Resident 40P – Income Tax Return Form 40P, pg 4 tab Line 67a OR Tax Forms States Oregon Nonresident 40N – Income Tax Return Page 4 tab Line 68a.
Form OR-24	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon + Organizer States Oregon Return Options "Force print Form 24" checkbox selected OR Organizer States Oregon Like-Kind Exchange data exists.
Form OR-243	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon +Organizer States Oregon Claim to Refund Due A Deceased Person "Activate Form 243" checkbox selected
Form OR-40	Organizer States Add States/Cities, Option "R" for Oregon
Form OR-40-EXT	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon +Batch Estimates and Extension is selected OR Organizer Payments and Extensions Extensions State Options and Payments Oregon option is selected.
Form OR-40-N	Organizer States Add States/Cities, Option "NR" for Oregon
Form OR-40-P	Organizer States Add States/Cities, Option "PY" for Oregon
Form OR-40-V	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon +Organizer States Oregon Return Options "Suppress print for Form 40-V" NOT selected + Tax Forms States Oregon 40-V- Payment Voucher Amount exist
Form OR-529	If Organizer E-file Enable Create under Oregon, box checked to enable e-file OR If Organizer States Common States Bank Information Direct debit is selected
Form OR-A	
Form OR-EF	
Form OR-STI	
Form OR-STI-V	
FormVSI	
Schedule EICITIN	
Schedule OR-ADD-DEP	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon +Tax Forms States Oregon "Main Form" Dependent Information hyperlink More than four completed entries.
Schedule OR-ASC	Organizer States Add States/Cities, Option "R" for Oregon +Tax Forms States Oregon Sch OR-ASC– Adjustments has data.
Schedule OR-ASC-N/P	Organizer States Add States/Cities, Option "PY" or "NR" for Oregon +Tax Forms States Oregon Sch OR-ASC-N/P – Adjustments has data.
Schedule OR-DONATE	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon +Tax Forms States Oregon OR-D Total charitable checkoff donations exist

Schedule OR-PTE-FY	Organizer States Add States/Cities, Option "R" for Oregon + Organizer States Oregon Return Options "Opt out and suppress the print for Schedule OR-PTE" NOT selected + Tax Forms States Oregon Resident OR-PTE-FY Pass-Though Entity Line 9 exists OR Tax Forms States Oregon Resident OR-PTE-FY Pass-Though Entity Line 14 exists.
Schedule OR-PTE-NR	Organizer States Add States/Cities, Option "NR" for Oregon + Organizer States Oregon Return Options "Opt out and suppress the print for Schedule OR-PTE" NOT selected + Tax Forms States Oregon Resident OR-PTE-NR Pass-Though Entity Line 9 exists OR Tax Forms States Oregon Resident OR-PTE-NR Pass-Though Entity Line 14 exists.
Schedule OR-PTE-PY	Organizer States Add States/Cities, Option "PY" for Oregon + Organizer States Oregon Return Options "Opt out and suppress the print for Schedule OR-PTE" NOT selected + Tax Forms States Oregon Resident OR-PTE-PY Pass-Though Entity Line 19 exists.
Schedule OR-WFCD	Organizer States Add States/Cities, Option "R" for Oregon + Organizer States Oregon Credits "Qualifies for WFHDC credit" checkbox is selected.
Schedule Z	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon + Tax Forms States Oregon Resident 40 – Income Tax Return Page 2 tab Line 22a OR Tax Forms States Oregon Part-Year Resident 40P – Income Tax Return Form 40P, pg 3 tab Line 46a OR Tax Forms States Oregon Nonresident 40N – Income Tax Return Page 3 tab Line 48a.
Worksheet FCG	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Oregon + Tax Forms States Oregon Resident 40 – Income Tax Return Page 2 tab Line 22b OR Tax Forms States Oregon Part-Year Resident 40P – Income Tax Return Form 40P, pg 3 tab Line 46b OR Tax Forms States Oregon Nonresident 40N – Income Tax Return Page 3 tab Line 48b.

Oregon Cities/Counties

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

Form Q-XX (year)

Organizer | States | Add States/Cities | Option "R" for Oregon + Organizer | Cities, Counties, Intangibles, Tangible | Oregon Counties | Taxpayer SP-XX or Spouse SP-XX | Estimate Option | Suppress Compute and Print is NOT selected + Organizer | Cities, Counties, Intangibles, Tangible | Oregon Counties | Taxpayer SP-XX or Spouse SP-XX | Estimated Tax | Estimate Option | Estimate with alphabetic information only is NOT selected + Organizer | Cities, Counties, Intangibles, Tangible | Oregon Counties | Taxpayer SP-XX or Spouse SP-XX | Estimate Option | Suppress print if estimated tax is less than threshold is NOT selected + Batch Estimates is not selected.

Form SP-XX

Organizer | States | Add States/Cities, Option "R" for Oregon + Organizer | Cities, Counties, Intangibles, Tangible | Oregon Counties | Taxpayer SP-XX or Spouse SP-XX | Basic Information | "Portland/Multnomah combined report" for Return Type + Organizer | Cities, Counties, Intangibles, Tangible | Oregon Counties | Taxpayer SP-XX or Spouse SP-XX | Basic Information | Select a Filer.

Form TM	Organizer States Add States/Cities, Option "R" for Oregon + Organizer Cities, Counties, Intangibles, Tangible Oregon Counties Taxpayer TM or Spouse SP-TM Basic Information "Tri-Met self-employment tax" for Return Type + Organizer Cities, Counties, Intangibles, Tangible Oregon Counties Taxpayer TM or Spouse SP-TM Basic Information Select a Filer.
Form TSE-AP	Organizer States Add States/Cities, Option "R" for Oregon + Organizer Cities, Counties, Intangibles, Tangible Oregon Counties Taxpayer TM or Spouse SP-TM Basic Information "Tri-Met self-employment tax" for Return Type + Organizer Cities, Counties, Intangibles, Tangible Oregon Counties Taxpayer TM or Spouse SP-TM Basic Information Select a Filer. +Tax Forms Cities, Counties, Intangibles, Tangible Oregon Counties TM-Self-Employment Tax Taxpayer TM or Spouse SP-TM Page 1 tab Percentage exists on line 2.
Form TSE-V	Organizer States Add States/Cities, Option "R" for Oregon + Organizer Cities, Counties, Intangibles, Tangible Oregon Counties Taxpayer TM or Spouse SP-TM Basic Information "Tri-Met self-employment tax" for Return Type + Organizer Cities, Counties, Intangibles, Tangible Oregon Counties Taxpayer TM or Spouse SP-TM Basic Information Select a Filer. + Organizer Cities, Counties, Intangibles, Tangible Oregon Counties Taxpayer TM or Spouse SP-TM Extension Information extension option is "Not applicable" +Tax Forms Cities, Counties, Intangibles, Tangible Oregon Counties TM-Self-Employment Tax Taxpayer TM or Spouse SP-TM Payment Voucher Amount exists

Oregon Cities/Counties: Portland/Multnomah

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Form SP

FormMC40

FormMC40NP

FormMET40

FormMET40NP

SchASC

Schedule HVT

Schedule R

SchINC

Pennsylvania

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Form PA-1000

If Print PA-1000 Select under Organizer|Pennsylvania|Property Tax and Rent Rebate

Form PA-1000, Schedule A

If Organizer | States | PA | Property Tax and Rent Rebate | PA-1000, box checked to print PA-1000

Form PA-1000, Schedules B/D/E	If data exists on Schedule PA-1000 Sch B line 4, Eligible Property Tax or Rent Paid PA-1000, Sch D line 4, Eligible Rent Paid or PA-1000 Sch E, line 3, Eligible Property Tax or Rent Paid in current year
Form PA-1000, Schedules F/G	If data exists on PA-1000, Schedule G, line 6 or data exists on Schedule PA-1000 Sch F line 3, Eligible Property Tax or Rent Paid in current year
Form PA-40	If Extension Only is not marked + If taxpayer is classified as a resident, nonresident or part-year resident of Pennsylvania.
Form PA-40ES	If taxpayers are both not dead and is a resident, nonresident, or part-year resident of Pennsylvania + Estimated tax liability greater than \$246 and estimates not suppressed + Estimate is not set to amount of overpayment OR Estimates are marked alpha only OR Override entered for first quarter estimated amount + Return not marked extension only + Form REV-276 does not contain a print code of numeric only or alpha only in Organizer Payments and Extension OR batch extensions was selected under Organizer Estimate and Extension Package Estimate and Extension Package with an indicator of either Generate Full Batch Package or Generate Only Batch Estimates
Form PA-40X	If PA-40 return marked as amended return
Form PA-41SchNRK1	
Form PA-41SchRK1	
Form PA-65SchNRK1	
Form PA-65SchRK1	
Form PA-8453	If Organizer E-file Enable Create under Pennsylvania, box checked to enable e-file + If taxpayer is shown as a resident, nonresident or part-year resident of Pennsylvania + Federal Self-Select PIN marked NO + signature form option for PA indicated in Orga E-file Enable/Create on Return Tab, column I in grid for PA
Form PA-8879	If Signature Option in Federal at Organizer E-file Signature Authorization Signature Option is checked + PA Form 8879 not required marked NO + PA checked to generate electronic filing + Use Federal Self Select PIN for PA marked YES + if Organizer States Pennsylvania Information Extension Option is not marked Extension Only, Alpha Only or Numeric Only + If taxpayer is shown as a resident, nonresident or part-year resident of Pennsylvania + If Organizer E-file Enable Create under Pennsylvania, box checked to enable e-file
Form PA-V Payment Voucher	If Organizer E-file Enable Create under Pennsylvania, box not checked to enable e-file + there is an amount due shown on form PA-V + if taxpayer is shown as a resident, nonresident or part-year resident of Pennsylvania + box is not checked at Organizer Pennsylvania E-file Return HIDE Bank Information Electronic Funds Withdrawal (Direct Debit).
REV-1630	If REV-1630, Page 2, Line 16 contains an amount, or if Organizer States Pennsylvania Penalties and Interest Underpayment of Estimated Tax Options 1, 2, or 3 is checked.

REV-276	If taxpayer is shown as a resident, nonresident or part-year resident of Pennsylvania + Form REV-276 contains a print code in Organizer Payments and Extension OR batch extensions was selected under Organizer Estimate and Extension Package Estimate and Extension Package with an indicator of either Generate Full Batch Package or Generate Only Batch Extensions + with a return type of either Federal and State or State Only.
REV-414(l) EX	If tax liability exceeds \$0 on line Rev-414 line 31.
Schedule 19	If Organizer State Pennsylvania Sale of Home Question 1 or Question 2 is answered Yes + if Tax Forms State Pennsylvania Sch 19 line 12 or 13 is populated.
Schedule A	If an amount on Sch A line 2, 3, 9, 11, 12, 13, 14, or 15 OR Organizer States Pennsylvania Return Options has Print Option to Force Print Schedule A and B (if schedule is not required) + Tax Forms States Pennsylvania Schedule A Line 16 or Schedule B Line 11 contain an amount + Organizer States Pennsylvania Return Options has Print Option to Force Print joint form Schedule A and B or if taxpayer Single, Married Filing Separately or Final or Deceased.
Schedule B	If Dividends are shown on Sch B OR Organizer States Pennsylvania Return Options has Print Option to Force Print Schedule A and B (if schedule is not required) + Tax Forms States Pennsylvania Schedule A Line 16 or Schedule B Line 11 contain an amount + Organizer States Pennsylvania Return Options has Print Option to Force Print joint form Schedule A and B or if taxpayer Single, Married Filing Separately or Final or Deceased.
Schedule C	If either Taxpayer or spouse have total income from Schedule C business + Sch C EZ has not been checked + The Sch C has an amount on Line 39 + Option not selected to use Federal Sch C instead of PA Sch C
Schedule D	If Tax Forms State Pennsylvania Sch D contains + If gain/loss from sale of capital stock or bonds + if gains/loss from PA pre 6/1/71 assets + if income/loss from PA post 6/1/71 assets + if income/loss from business casualties + loss from personal casualty and theft losses + disposition of business properties + dispositions from Sec 1256 contracts + if dispositions from straddle sales + disposition from 8824 properties + income/loss from sale of activities + disposal of other business properties + disposal of 1244 stock
Schedule D-1	If Sch D-1 found under Tax Form States Pennsylvania Schedule D-1 - Current Year Installment or Prior Year Installment Activity Name there are gain shown under Asset Descriptions listed for either the taxpayer or the spouse for a current year gain or prior year sale..
Schedule D-71	If In Tax forms States Pennsylvania Schedule D-71 shows in either column a pre 6/1/1971 gain then the form should print. D-71 gain indicated by input in Organ States Pennsylvania Adjustments to Federal Amounts, Adjustments to Federal Gains tab, entry in last columns regarding 6/71 value and method of valuation
Schedule DC	
Schedule E	If Tax Forms States Pennsylvania Schedule E displays an amount on Total income line

Schedule F	If either Tax forms States Pennsylvania Sch F Farm income shows a income or loss on line 41Taxpayer or spouse have total income from Scedule F Farm Income
Schedule G-L	If Tax Forms States Pennsylvania Sch G-L Credit for Taxes Paid Schedule GL Line 6 PA Resident Credit
Schedule J	If income exists on Pennsylvania Sch J, Total Income
Schedule NRH	If partner is nor-resident + If Sch NRP shows data, either in Part I, lines 17 - 22 mshows data, or Part II Line 7
Schedule O	If Schedule O, Part III line 10 contains data
Schedule OC	If Schedule OC, line 16 contains data
Schedule P	If Organizer States Pennslyvania ontributions with a contribution coded for PA 529 College Savings + Tax Form Sch P - 529 College Savings with amount in refund donation field
Schedule Rev1630A	
Schedule Rev1882	
Schedule Rev459	
Schedule SP	If line 1, on Tax Form State Pennsylvania Form SP is marked NO or If line 1, on Tax Form State Pennsylvania Form SP is marked YES and line 2 on Tax Form State Pennsylvania Form SP is marked YES + Part D line 16 of Schedule SP has an amount
Schedule Statement	
Schedule T	If line 6 on Schedule T has data or Organizer States Pennsylvania Return Options, in the Print Option box the Force Print Schedule T is marked
Schedule UE	If Schedule UE, Page 1, Item J has an amount of net expense reimbursement
Schedule W	If data exists on Schedule W lines 19-25
Schedule W2-S	If Tax Forms State Pennsylvania Schedule W-2-S showing data from W-2 wages of TP or Spouse or PA 1099R income or taxes withhold on such income or Fed Wages or Taxable foreign wages or Total Misc income or Misc tax withheld

Worksheet W2RW

Pennsylvania Cities: Local

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Local Earned Income Tax	If Organizer Cites, Counties, Intangibles, Tangible Pennsylvania Cities Pennsylvania Local Tax Return with a resident Jurisdiction shown
Local Estimated Earned Income Tax	If Organizer Cites, Counties, Intangibles, Tangible Pennsylvania Cities Pennsylvania Local Tax Return with a resident Jurisdiction shown + Residency Information + Estimate Option not suppressed

Pennsylvania Cities: Philadelphia BIRT

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule	Requirement(s) to Print
BIRT Extension Worksheet and Coupon	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked General Information + Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked Extension Information, one of the two extension options checked (NA not checked)
BIRT Payment Coupon	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked Return Options, under Compute Options be sure USE BIRT-EZ refund not checked + Extension Only not checked in Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Extension
Change form	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked Change Form + BIRT and Net Profits Tax box checked + Information of a change entered on form + Extension Only not checked in Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Extension
Form BIRT	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked General Information + Extension Only not checked in Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Extension
Form BIRT-EZ	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked + Return Option, under Compute Options have USE BIRT-EZ refund checked
Schedule A	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked General Information, under Method Method I should be checked + Tax Forms Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT BIRT-Business Income & Receiptes Tax under Tab Schedule A, line 15 must have data.
Schedule B	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked General Information, under Method Method II should be checked + Tax Forms Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT BIRT-Business Income & Receiptes Tax under Tab Schedule B, line 12 must have data.
Schedule C-1	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked + Tax Forms Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT BIRT-Business Income & Receiptes Tax under Tab Schedule C-1, line 3 must have data.
Schedule D	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked + Tax Forms Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT BIRT-Business Income & Receiptes Tax under Tab Schedule D, line 11 must have data.

Schedule E	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked + Tax Forms Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT BIRT-Business Income & Receipts Tax under Tab Schedule E, line 15 must have data.
Schedule SC	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked + Tax Forms Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT BIRT-Business Income & Receipts Tax under Tab Schedule SC, line 13 must have data.
Worksheet N	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BIRT Ownership (T,S,J) ownership type checked Return Options + Return Options check box to Compute and print Worksheet N.

Pennsylvania Cities: Philadelphia NPT

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Change form	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPTT Ownership (T,S,J) ownership type checked Change Form + If Resident or Nonresident checked + BIRT and Net Profits Tax box checked + Information of a change entered on form + Extension Only not checked in Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia BPT Extension Information
E-file Signature Authorization	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPTT Ownership (T,S,J) ownership type checked + If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPTT Ownership (T,S,J) ownership type Extension Information one of the extension options are checked (NA unchecked)
ENP-1 & 2 (Estimated Payment Coupons)	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPTT Ownership (T,S,J) ownership type checked Change Form + If Tax Form Cities Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Worksheet C, Ln 3 exceeds \$100 or + If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPTT Ownership (T,S,J) ownership type checked Estimated Tax Compute Option is marked Force print of estimate when estimated tax is less than threshold and ENP-1 or ENP-2 have data in line 3
Form NPT	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Ownership (T,S,J) ownership type checked General Information under general information the city account number is present + Extension Only not checked in Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Extension.
NPT Extension Payment Coupon	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Ownership (T,S,J) ownership type checked General Information under general information the city account number is present + Extension with tax return and numeric entries checked in Organ Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Extension + An amount is entered in Due with extension (does not include underpayment penalty)

NPT Extension Worksheet	If Tax Form CitiesCounties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Line 11 contains an amount of tax due, form populates with amounts.
NPT Payment Coupons	If Organizer Efile Create does or doesnot have NPT checked for efile + If Tax Form CitiesCounties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Line 15 contains an amount of tax due, form populates with amounts.
Worksheet N	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPT Ownership (T,S,J) ownership type checked Return Options Print Options box is checked to compute and print Worksheet N
Worksheet NR-3	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia NPTT Ownership (T,S,J) ownership type checked Change Form
Worksheets A, B, & C	If taxpayer a resident of Philadelphia + If Tax Form CitiesCounties, Intangibles, Tangibles Pennsylvania Cities Worksheet A Line 4 contains an amount of tax due, form populates with amounts or If taxpayer a nonresident of Philadelphia + If Tax Form CitiesCounties, Intangibles, Tangibles Pennsylvania Cities Worksheet B Line 64 contains an amount of tax due, form populates with amounts or if lines 1, 2, or 3 of Worksheet C contain data, worksheet will print.
Worksheets E, & K	Worksheet D does not apply to individual returns + Print Worksheet E if Tax Form CitiesCounties, Intangibles, Tangibles Pennsylvania Cities Worksheet E Line 4 contains an amount or If Tax Form CitiesCounties, Intangibles, Tangibles Pennsylvania Cities Worksheet K, Line 4 contains an amount.

Pennsylvania Cities: Philadelphia School District

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Change form	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia School Ownership (T,S,J) ownership type checked Change Form + If Resident or part-year resident checked + School Income Tax box checked + Information of a change entered on form.
Extension payment coupon	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia Schools Ownership (T,S,J) ownership type checked + Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia School Extension Information, one of the two extension options checked (NA not checked) or Batch Extension is checked in Organ Estate and Extension Package Estimate and Extension Package Cities, Counties, Intangibles in Package with Philadelphia School District checked
School Income Tax (SIT)	If Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia School Ownership (T,S,J) ownership type checked General Information + Extension Only not checked in Organizer Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia School Extension Information
School Income Tax (SIT) S corporation shareholder worksheet	If Tax Forms Cities, Counties, Intangibles, Tangibles Pennsylvania Cities Philadelphia School Ownership (T,S,J) ownership type checked General Information\S-1 School Income Tax\S-Corp Distribution, line 6 of form needs to have data

SIT Payment Coupon

If Tax Forms | Cities, Counties, Intangibles, Tangibles|Pennsylvania Cities | Philadelphia School | Ownership (T,S,J) ownership type checked|Extension Information | Extension Option, option to print extension not checked + Resident of Philadelphia + Total amount due on S-1 Line 14.

Rhode Island

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 2210A

Form RI-1040

Organizer | States | Add States/Cities, Option "R" for Rhode Island + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3 or 4 for Rhode Island

Form RI-1040 ES

Organizer | States | Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + NOT check Organizer | States | Rhode Island | Amended Return, "Amended + + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3, 4 or 5 for Rhode Island + NOT select "Suppress compute and print" in Organizer| States | Rhode Island | Estimated Tax, Estimated Tax block, Estimated Option + Amount on Tax Forms | States | Rhode Island | Resident or Part-year Resident/Nonresident | RI-1040ES - Estimated Tax | Worksheet, Line 11 + Amount on Tax Forms | States | Rhode Island | Resident or Part-year Resident/Nonresident | RI-1040ES - Estimated Tax | Worksheet, Line 11 is larger than or equal to 250, or NOT check Organizer | States | Rhode Island | Estimated Tax, Compute and Print Options, "Suppress print if estimated tax is less than threshold" and if no payments are due, NOT check "Suppress print if no payments are due after applying overpayment" and also NOT select "Estimated equal to current year overpayment" option in Estimated Tax block, Estimated Option on the same screen or Organizer | States | Rhode Island | Estimated Tax, Estimated Tax block, Estimated Option, "Estimate with alphabetic information only",

Form RI-1040 MU

Organizer | States | Add States/Cities, Option "R" for Rhode Island + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3 or 4 for Rhode Island + Organizer | States | Rhode Island | Credits | General Credits, "Credit for Taxes Paid to Other State(2)", two or more "X" entered for states with taxes and incomes

Form RI-1040 NR

Organizer | States | Add States/Cities, Option "PY" or "NR" for Rhode Island + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3 or 4 for Rhode Island

Form RI-1040H

Organizer | States | Add States/Cities, Option "R" for Rhode Island + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3 or 4 for Rhode Island + YES to all questions in Tax Forms | States | Rhode Island | Resident | 1040H Property Tax Relief Claim | Page 1, PART 1

Form RI-1040NR Schedule II

Organizer | States | Add States/Cities, Option "NR" for Rhode Island + Organizer | Payments and Extensions | Extensions | State Options and Payments, Option 3 or 4 for Rhode Island + Data on Tax Forms | States | Rhode Island | Part-year Resident/Nonresident | Sch II - Full Yr Nonresident Tax Calc | Page 7 or 8

Form RI-1040NR Schedule III	Organizer States Add States/Cities, Option "PY" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Data on Tax Forms States Rhode Island Part-year Resident/Nonresident Sch II - Full Yr Nonresident Tax Calc Page 9 or 10
Form RI-1040NRMU	Organizer States Add States/Cities, Option "PY" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Organizer States Rhode Island Credits General Credits, "Credit for Taxes Paid to Other State(2)", two or more "X" entered for states with taxes and incomes
Form RI-1040V	Organizer States Add States/Cities, Option "R" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + NOT enable Rhode Island on Organizer E-file Enable/Create Return tab + Amount on ax Forms States Rhode Island Resident or Part-year Resident/Nonresident RI-1040V - Payment Voucher, Line 3 "ENTER AMOUNT ENCLOSED
Form RI-1310	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Check Organizer States Rhode Island Return Options, Print Options block, "Print RI 1310 (federal Form 1310 must be generated) + Data on Tax Forms States Rhode Island Resident or Part-year Resident/Nonresident RI-1310 - Deceased Taxpayer Refund Claim
Form RI-2210	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Positive amount on Tax Forms States Rhode Island Resident or Part-year Resident/Nonresident RI-2210 - Underpayment Penalty Page 2, Line 22, and Organizer States Common State Underpayment, Option 1, 2, or 3; or, Organizer States Common State Underpayment, Option 2 or 3, and data on RI-2210
Form RI-4868	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 1, 2, 3 or 4 for Rhode Island
Form RI-6238	Organizer States Add States/Cities, Option "R" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Amount on Tax Forms States Rhode Island Resident RI-6238 - Lead Abatement Credit Page 1, Line 7 "Total Credit
RI Schedule CR	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Tax Forms States Rhode Island Resident or Part-year Resident/Nonresident Sch CR - Other Credits, Line 8 "TOTAL CREDITS" or Line 11 "TOTAL CREDIT RECAPTURE
RI Schedule E	
RI Schedule M	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Data on Tax Forms States Rhode Island Part-year Resident/Nonresident Sch M Modifications to Federal AGI Page 1 or 2

RI Schedule U	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Tax Forms States Rhode Island Resident or Part-year Resident/Nonresident Sch U - Use Tax, Line 4 "Net use tax due" or Line 8 "Use tax due"
RI Schedule W	Organizer States Add States/Cities, Option "R", "PY", or "NR" for Rhode Island + Organizer Payments and Extensions Extensions State Options and Payments, Option 3 or 4 for Rhode Island + Tax Forms States Rhode Island Resident or Part-year Resident/Nonresident Sch W - W-2 and 1099 Information, Line 16 "Total TI Income Withheld"
Schedule EIC	
Schedule EICNR	
Schedule I	
Schedule II	
Schedule IIMU	
Schedule IndMan	
Schedule INR	
Schedule RICheckOff	

South Carolina

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form I-319	If Form I-319 Line 9 is populated
Form I-330	if Form I-330 Line 18 is populated
Form I-333	If Form I-333 Line 1 is populated
Form I-334	If Form I-334 Line 8 is populated
Form I-335	if Form I-335 Line 5 or 7 is populated
Form I-335A	if Form I-335A Line 3 is populated
Form I-335B	if Form I-335B Property Number and K-1 Name are populated
Form I-360	If Form I-360 Taxpayer line 5 is populated
Form I-361	If Form I-361 line 7, Parental Refundable Credit, is populated.
Form SC1040	If SC is marked as Resident
Form SC1040ES	Organizer States South Carolina Estimated Tax Payments on Next year's Estimated Tax (Extended Returns Only) at least one column needs to be populated
Form SC1040TC	if Form SC1040TC line 18 is populated
Form SC1040-V	if form SC8453 line 8 is populated

Form SC1040X	Organizer States South Carolina Amended Return Section Mandatory Information needs to have option other than not applicable selected AND Section Print Option needs to have option other than not applicable selected
Form SC1310	Organizer States South Carolina Return Options Print Options Check Print SC 1310 and Federal 1310 must be generated first
Form SC2210	Organizer States South Carolina Penalties and Interest Penalties and Interest Options to Compute and Print Underpayment Penalty cannot be set to Suppress penalty computation and do not print form AND Form SC2210 Page 2 line 16 populated OR Form SC2210 page 4 line 34 populated OR Form SC2210 Page 2 Part II Reason A or C is marked
Form SC3911	Organizer States South Carolina Return Options Print Options Print SC 3911 enter status of tax refund check needs to make a selection
Form SC4868	Organizer Payments and Extensions Extensions State Options and Payments Selection option 1 or 3 for SC
Form SC4972	Organizer Taxes Lump Sum Distributions Taxpayer Method and Questions Mothod of reporting lump-sum distributions (Mandatory) Make a selection AND Tax Forms States South Carolina Nonresident SC4972-Tax on Lump-Sum Distributions Taxpayer Page 1 Line 1 and line 25 needs to be popualted
Form SC8453	if SC are enabled for E-file at Organizer E-file Enable/Create.
Form SC8582	If Organizer States South Carolina Passive Activity Limitation Reclaculation of Passive activity are checked AND Tax Forms States South Carolina Nonresident SC8582 Line 4 is populated
Schedule NR	if SC are marked as NR at Organizer States Add States/Citie
Schedule TC-1	If Form Sch TC-1 line 7 is populated
Schedule TC-11	If Form Sch TC-11 line 8 is populated
Schedule TC-12	If Form Sch TC-12 Section E line 5 is populated
Schedule TC-12A	If Form Sch TC-12A Section E line 5 is populated
Schedule TC-14	If Form Sch TC-14 line 5 is populated
Schedule TC-18	If Form Sch TC-18 line 9 is populated
Schedule TC-19	If Form Sch TC-19 line 8 is populated
Schedule TC-2	Organizer States South Carolina Credits TC Credits Disadvantaged Sm Business needs to be populated
Schedule TC-20	If Form Sch TC-20 Part III is populated
Schedule TC-21	If Form Sch TC-21 line 7 is populated
Schedule TC-21	If Form Sch TC-21 line 7 is populated
Schedule TC-22	If Form Sch TC-22 line 7 is populated
Schedule TC-22	If Form Sch TC-22 line 7 is populated
Schedule TC-23	If Form Sch TC-23 line 5 is populated

Schedule TC-23	If Form Sch TC-23 line 5 is populated
Schedule TC-24	If Form Sch TC-24 line 4 is populated
Schedule TC-24	If Form Sch TC-24 line 4 is populated
Schedule TC-25	If Form Sch TC-25 line 7 is populated
Schedule TC-26	If Form Sch TC-26 line 1 is populated
Schedule TC-27	If Form Sch TC-27 line 6 is populated
Schedule TC-28	If Form Sch TC-28 line 4 is populated
Schedule TC-29	If Form Sch TC-29 line 6 is populated
Schedule TC-3	If Form Sch TC-3 line 6 is populated
Schedule TC-3	If Form Sch TC-3 line 6 is populated
Schedule TC-30	If Form Sch TC-30 line 5 is populated
Schedule TC-31	If Form Sch TC-31 line 7 is populated
Schedule TC-32	If Form Sch TC-32, if you answer "Yes" to all the questions above, enter \$25 (\$50 if you are married filing jointly) here and on SC1040TC. is populated
Schedule TC-35	If Form Sch TC-35 line 7 is populated OR Line 8 is populated.
Schedule TC-36	If Form Sch TC-36 line 5 is populated
Schedule TC-38	If Form Sch TC-38 line 10 is populated
Schedule TC-4	If Form Sch TC-4 line 19 is populated
Schedule TC-4	If Form Sch TC-4 line 19 is populated
Schedule TC-40	If Form Sch TC-40 line 3 is populated
Schedule TC-41	If Form Sch TC-41 line 11 is populated
Schedule TC-43	If Form Sch TC-43 line 13 is populated
Schedule TC-44	If Form Sch TC-44 line 10 is populated OR Line 11 is populated.
Schedule TC-45	If Form Sch TC-45 line 6 is populated
Schedule TC-46	If Form Sch TC-46 line 17 is populated
Schedule TC-4SA	If Form Sch TC-4SA Page 4 line 17 is populated
Schedule TC-4SA	If Form Sch TC-4SA Page 4 line 17 is populated
Schedule TC-5	If Form Sch TC-5 line 4 Total is populated
Schedule TC-5	If Form Sch TC-5 line 4 Total is populated
Schedule TC-51	If Form Sch TC-51 line 3 is populated
Schedule TC-52	If Form Sch TC-52 line 3 is populated
Schedule TC-53	If Form Sch TC-53 line 3 is populated
Schedule TC-54	If Form Sch TC-54 line 6 is populated

Schedule TC-55	If Organizer States South Carolina Credits TC Credits Abandoned Building is populated
Schedule TC-56	
Schedule TC-57	
Schedule TC-58	
Schedule TC-59	
Schedule TC-60	If Schedule TC-60 line 2, South Carolina Earned Income Tax Credit is populated
Schedule TC-61	
Schedule TC-62	
Schedule TC-63	
Schedule TC-63R	
Schedule TC-64	
Schedule TC-65	
Schedule TC-66	
Schedule TC-67	
Schedule TC-9	If Form Sch TC-9 Page 2 Part III line 7 is populated
Schedule TC-9	If Form Sch TC-9 Page 2 Part III line 7 is populated

Tennessee

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
Form FAE 170	
Form FAE 172	
Form FAE 173	
Form INC-250	Organizer States Add States/Cities Tennessee Resident or part-year selected + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Tennessee Options 3, 4, and 5.
Form INC-251	Organizer States Add States/Cities Tennessee Resident or part-year selected + Organizer Payments and Extensions Extensions State Options and Payments (TAB) Tennessee Options 1,2,3 and 4 Or Organizer States Tennessee Payments Prepayment Information (SELECT) Prepayment of Tax.
Report of Debts	Organizer States Add States/Cities Tennessee Resident or part-year selected + Tax Form View Tennessee INC 250 - Income Tax Return Page 1 Line 9 populated
Schedule A	
Schedule B	

Schedule C

Schedule D

Schedule E

Schedule F1

Schedule G

Schedule H

Schedule J

Schedule J2

Schedule K

Schedule M

Schedule N

Schedule O

Schedule P

Schedule R

Schedule S

Schedule T

Schedule U

Schedule V

Utah

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form TC-131

Organizer | Taxpayer Info | Date of death for Deceased Taxpayer AND Utah | Decased Refund Claim Stmt | Check one of the two Mandatory checkboxes

Form TC-40

Amount on line 4 of form, which flows from Federal AGI

Form TC-40A

Automatic if TC-40 or TC-40B

Form TC-40B

Federal AGI and Non or Part-year Resident

Form TC-40S

Amount on line 7 of form for credit for taxes paid to another state.

Form TC-40W

Automatic if Utah withholding entered in K-1, W-2 or 1099 Source Documents OR Organizer | Utah | Mineral Production Withholding

Form TC-546

Organizer | Payments and Extensions | Extensions | State Options and Payments | Utah - one of option 1 - 4 selected

Form TC-547

If tax due on line 40 of TC-40, page 3

Form TC-831

Organizer | Utah | E-file | Additonal Info | E-file opt out - select checkbox

Vermont

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule	Requirement(s) to Print
Form 8879-VT	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If Vermont enable e-file is checked under Organizer, E-file, Enable/Create.
Form HI-144	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If resident and there is data for the following items on HS-122 - location of homestead, SPAN, Not claimed as a dependent by someone else, housesite value, total household income is less than or equal to the house income limit OR 2. If Force Printed on Organizer, States, Vermont, Return Options OR 3. if Questions 1-3 on PR-141 are answered Yes OR 4. if household income is less than limit
Form HS-122	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. (1. If (resident or part year resident) and there is data for SPAN numbers and location of homestead on Form HS-122 OR 2. If Force printed on Organizer, States, Vermont, Homeowner/Renter/Property Info, Homestead Declaration tab, Print Options, Print Options for Form HS-122 OR AND 3. If Suppress print not selected on Organizer, States, Vermont, Homeowner/Renter/Property Info, Homestead Declaration tab, Print Options, Print Options for Form HS-122
Form IN-111	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. Main form for all Vermont individual returns, no other conditions
Form IN-112	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. If data exists for any of the following: 1. Part I Total interest income from state and local obligations exempt from federal tax 2. Part I Interest income from Vermont municipal obligations 3. Part II Total of Additions multiplied by 24% plus Recapture of VT credits 4. Part II Total of Credit for Child and Dependent Care Expenses, Credit for the Elderly or Disabled, Investment Tax Credit, VT Farm Income Averaging Credit multiplied by 24% plus Solar energy credit 5. Part III Vermont earned income credit for Full Year Residents 6. Part III Vermont earned income credit for PY residents 7. Part IV Higher Education Investment Credit plus Charitable Housing Credit plus Qualified Sale of Mobile Home Park Credit plus Research&Development Credit 8. If Force Printed on Organizer, States, Vermont, Return Options
Form IN-113	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If data exists for Part II Total of Non-Vermont income plus Military pay plus Railroad Retirement income plus Bond/note interest from VSAC, Build America, Vermont Telecom Authority, or Vermont Public Power Supply Authority

Form IN-114	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If Total of Balance to pay for vouchers 1-4 has data AND any of the following is Yes: 2. (if Estimated Tax Liability on Estimate worksheet has data or there is an amount to pay on vouchers 1-4 AND Estimates are not suppressed under Organizer, States, Vermont, Estimated Tax AND Estimated tax liability is less than minimum tax liability AND Estimated tax liability minus overpayments applied to estimates and estimate payments already made is greater than NONE) OR 3. Estimate with alphabetic only information option selected under Organizer, States, Vermont, Estimated Tax OR 4. Batch estimate alpha only option selected)
Form IN-116	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If there is a payment amount AND 2. enable e-file is not checked under Organizer, E-file, Enable/Create
Form IN-117	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If X to compute credit for taxes paid is entered for a state under Organizer, States, Vermont, Credits, General Credits, Credit for Taxes Paid to Other States AND 2. If there is a value for Other States Credit on Form IN-111
Form IN-119	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If Name of Entity is entered AND (2. (if there is data for Affordable Housing Credit, Rehabilitation of Certified Historic Buildings Credit, Platform Lifts, Elevators, or Sprinkler Systems Credit, Historic Rehabilitation Credit, Facade Improvement Credit, or Code Improvements Credit AND there is data for the total of these credits plus Total Credits from IN-112 Part IV) OR there is data for Venture Seed Capital Fund credit or Total Income Tax Credits Available) OR 3. If Force Printed on Organizer, States, Vermont, Return Options)
Form IN-151	1. If Batch Extension is selected OR 2. If Extension option is selected under Organizer, Payments and Extensions, Extensions, State Options and Payments tab.
Form IN-152	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If Annualized Not selected under Organizer, States, Vermont, Penalties and Interest AND (2. if there is an amount for Total Interest and Penalty and compute/print of IN-152 is not suppressed under Organizer, States, Vermont, Penalties and Interest and there is data for Tax After Credits on IN-111 and there is a positive value for Tax after credits on IN-111 minus Vermont withheld tax minus Renter rebate minus Earned Income Credit minus Low income child & dependent care credit OR 3. Estimate options to always print form is selected under Organizer, States, Vermont, Penalties and Interest, Option to Compute and Print Underpayment Penalty).

Form IN-152A	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If Annualized selected under Organizer, States, Vermont, Penalties and Interest AND (2. if there is an amount for Total Interest and Penalty and compute/print of IN-152 is not suppressed under Organizer, States, Vermont, Penalties and Interest and there is data for Tax After Credits on IN-111 and there is a positive value for Tax after credits on IN-111 minus Vermont withheld tax minus Renter rebate minus Earned Income Credit minus Low income child & dependent care credit OR 3. Estimate options to always print form is selected under Organizer, States, Vermont, Penalties and Interest, Option to Compute and Print Underpayment Penalty)
Form IN-153	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If Capital Gains Deduction on IN-111 has a value OR 2. If Force Printed on Organizer, States, Vermont, Return Options
Form IN-155	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. No other print conditions
Form RCC-146	For all Vermont forms except Form IN-151: If no Extension Option is selected for Extension Only under Organizer, Payments and Extensions, Extensions, State Options and Payments tab. 1. If Q1 is answered yes and Q2 is answered no and Q3 is answered yes OR 2. If Force Printed on Organizer, States, Vermont, Return Options

Virginia

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
E-file Reasonable Cause Worksheet	The following conditions must be met: 1. Organizer States Add States/Cities - A value for Virginia, other than "B" must be selected 2. Organizer States Virginia E-file Additional Information E-file Opt Out - "Print opt out form" must be selected.
Form 40ES	Not supported
Form 502FED1	
Form 760	Organizer States Add States/Cities - "R" must be selected for Virginia.
Form 760C	Organizer States Add States/Cities - A value other than "B" must be selected for Virginia. +Form 763S must be present + Organizer States Virginia Penalties and Interest Penalties and Interest - Suppress penalty computation and do not print must not be selected AND one of the following: - Any installment is underpaid OR - Payments are made for less than 4 installments This form can also be forced to print by navigating to: Organizer States Virginia Penalties and Interest Penalties and Interest.
Form 760ES	Organizer Payments and Extensions Extensions State Options and Payments Virginia option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable + Organizer States Virginia Special Nonres Claim for Tax Withheld - must have no information entered.

Form 760F	Organizer States Add States/Cities - A value other than "B" must be selected for Virginia. + Organizer States Common State Basic Return Information - Farmer or Fisherman must be selected. + Organizer States Virginia Penalties and Interest Penalties and Interest - Suppress penalty computation and do not print must not be selected + Form 763S must be present + Form 760F, Line 12 has a value This form can also be forced to print by navigating to: Organizer States Virginia Penalties and Interest Penalties and Interest.
Form 760IP	Organizer States Add States/Cities - A value other than "B" must be selected for Virginia. + Organizer Payments and Extensions Extensions State Options and Payments - Enable extension for Virginia
Form 760-PMT	Organizer Payments and Extensions Extensions State Options and Payments Virginia option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable + Organizer States Virginia Special Nonres Claim for Tax withheld - must have no information entered. + Tax Forms States Virginia Resident 760 PMT - There must be a payment amount + Organizer States Common State Bank Information - Authorization to Debit Funds must not be selected + Organizer States Common State Basic Return Information - Farmer or Fisherman must not be selected.
Form 760PY	Organizer States Add States/Cities - "PY" must be selected for Virginia.
Form 763	The following conditions must be met: 1. Organizer States Add States/Cities - "NR" must be selected for Virginia. 2. Organizer States Virginia Special Nonres Claim for Tax Withheld - must have no information entered.
Form 763-S	Organizer States Virginia Special Nonres Claim for Tax Withheld: A selection must be made for State Exemption category + Organizer States Virginia Special Nonres Claim for Tax Withheld: - An amount must be entered for "Taxpayer amount of Virginia tax withheld requested to be refunded". OR - An amount must be entered for "Spouse amount of Virginia tax withheld requested to be refunded".
Form VA-8453	Organizer Payments and Extensions Extensions State Options and Payments Virginia option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable + Organizer States Virginia Special Nonres Claim for Tax Withheld - must have no information entered. + Organizer E-file Enable/Create - Virginia must be enabled + Organizer E-file Enable/Create Signature Form Option - Print Form VA-8453 must be enabled
Form VA-8879	Organizer Payments and Extensions Extensions State Options and Payments Virginia option to have an extension with a return is selected (Alpha only or alphanumeric) or Not applicable + Organizer States Virginia Special Nonres Claim for Tax Withheld - must have no information entered. + Organizer E-file Enable/Create - Virginia must be enabled + Organizer E-file Enable/Create Signature Form Option - Use PIN from federal 8879 (Default) must be selected.
Schedule A	

Schedule ADJ	Organizer States Add States/Cities - A value other than "B" must be selected for Virginia. + VA Schedule ADJ must have a value on one of the following: - Line 3: This amount represents Total Additions - Line 7: This amount represents Total Subtractions - Line 9: This amount represents Total Deductions - Line 17: This amount represents Credit Amount - Line 21: This amount represents Total Addition to Tax, Penalty and Interest This schedule can also be forced to print by navigating to: Organizer States Virginia Return Options.
Schedule CR	Tax Forms States Virginia Resident Sch CR - Credit Computation - An allowable credit is listed on any page. + Organizer States Virginia Special Nonres Claim for Tax Withheld - must have no information entered.
Schedule FED	Organizer States Add States/Cities - A value other than "B" must be selected for Virginia. + Organizer States Virginia Schedule FED Information - Locality information must be entered for the applicable activity AND one of the following: 1.Organizer Income Business Income - an activity must exist + Organizer Income Business Income Activity Name Columnar Vehicle Expense Entry Vehicle Exp Info - Sch C - mileage decution must be taken OR 2. Organizer Income Farm Income - an activity must exist + Organizer Income Farm Income Activity Name Columnar Vehicle Expense Entry - mileage decution must be taken OR 3. Organizer Adjustments to Income Employee Business Expense - an activity must exist + Organizer Adjustments to Income Employee Business Expense Activity Name Columnar Vehicle Expense Entry - mileage decution must be taken
Schedule HCI	
Schedule INC/CG	The following conditions must be met: Organizer States Virginia Return Options - The schedule is not suppressed AND one of the following: 1. Resident return +Organizer States Add States/Cities - "R" must be selected for Virginia. +VA Form 760, Line 20a or Line 20b must have a value. These values represent VA income tax withheld for taxpayer or spouse. 2. P/Y Resident return +Organizer States Add States/Cities - "PY" must be selected for Virginia. +VA Form 760PY, Line 20a or Line 20b must have a value. These values represent VA income tax withheld for taxpayer or spouse. 3. Nonresident return +Organizer States Add States/Cities - "R" must be selected for Virginia. +VA Form 763, Line 20a or Line 20b must have a value. These values represent VA income tax withheld for taxpayer or spouse.
Schedule of Income	Organizer States Add States/Cities - "PY" must be selected for Virginia.
Schedule OSC	Organizer States Add States/Cities - "R" or "PY" must be selected for Virginia. + Organizer States Virginia Credits Schedule CR Credit for Taxes Paid to Other State(s) - Data must be entered for columns 1, 2, and 3. + Tax Forms States Virginia Resident 760/CG - Income Tax Return Page 1 - Line 25 must have a value OR Tax Forms States Virginia Part-year Resident 760PY - Income Tax Return Page 2 - Line 25 must have a value.
Schedule VACS/CG	Organizer States Add States/Cities - A value other than "B" must be selected for Virginia. + Virginia must have an available overpayment. + Organizer States Virginia Contributions - Data must be entered for one of the options.

Schedule VACS/CG-1	Organizer States Add States/Cities - A value other than "B" must be selected for Virginia. + Virginia must have an available overpayment. + Organizer States Virginia Contributions - Data AND and amount must be entered for more than five College Savings Plan Contributions.
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Schedule VK1

West Virginia

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule	Requirement(s) to Print
E-file Mandate Opt Out Form	Organizer States West Virginia E-file Additional Information Check box "Print opt out form"
Form IT-140	Organizer States Add States/Cities West Virginia Select something other than "B - None Selected"
Form IT-140ES	State is not blocked Estimates and Extension batch is alpha only Organizer States West Virginia Estimates are not suppressed
Form IT-140V	E-file is enabled Tax Forms States West Virginia IT-140V Enter Payment Amount Organizer States West Virginia Return Options Form is not suppressed
Form IT-140W	If W2 Tax Withheld exists Print blocked
Form IT-210	Organizer States West Virginia Penalties and Interest Annualization Values entered here flow to form and trigger the print
Form WV/8379	Tax Forms States West Virginia WV-8379 Joint Income Line 1 must have an amount Organizer States West Virginia General Information Check box "Filing Form WV-8379 as an injured spouse
Form WV/NFA-1	Or Organizer States WV Return Options Print Options Check box "Force print Schedule WV/NFA-1 Or Tax Forms States West Virginia Part-year Resident/Nonresident Sch NFA-1 - Nonfamily Adoption Credit Enter "Adoption Case Number" or Child Name
Form WV-8453	Organizer E-file Enable/Create Select 8453 for WV AND Organizer E-file Enable/Create Enable E-file for WV
Schedule A	Organizer States Add States/Cities Select "NR - Nonresident" or "PY - Part-Year Resident"
Schedule DP	Tax Forms States West Virginia Part-year Resident/Nonresident Sch DP - Additional Dependents Must be a valid dependent And Tax Forms States West Virginia Part-year Resident/Nonresident Sch DP - Additional Dependents 5 or more dependents
Schedule F	Organizer States West Virginia Return Options Check box "Force print Schedule F"
Schedule FTC-1	Tax Forms States West Virginia Part-year Resident/Nonresident Sch FTC-1 - Family Tax Credit Line 8 must have a value

Schedule HEPTC-1	Tax Forms States West Virginia Part-year Resident/Nonresident Sch HEPTC-1 - Homestead Property Credit Line 9 must have a value or Organizer States West Virginia Return Options Check box "Force print Schedule HEPTC-1
Schedule J	Tax Forms States West Virginia Part-year Resident/Nonresident Sch J - Military Incentives Credit Total line has a value
Schedule L	State not blocked AND (Organizer Estimate and Extension Package Estimate and Extension Package Generate Extension or Organizer Payments and Extensions Extensions State Options and Payments Enable Extension)
Schedule M	IT-140 page 2 prints
Schedule SCTC	Tax Forms States West Virginia Part-year Resident/Nonresident SCTC-1 - Senior Citizen Tax Credit Line 2 Allowable Credits exist or Organizer States West Virginia Return Options Force print Schedule SCTC-1
Schedule UT	Tax Forms States West Virginia Part-year Resident/Nonresident Sch UT - Purchasers Use Tax Line 13 has a value
Schedules H & E	Schedule H & E Organizer States West Virginia Credits Certification for Permanent Disability Filing of Schedule H Make a selection and Tax Forms States West Virginia Part-year Resident/Nonresident Sch H - Permanent and Total Disability Page 1 - Taxpayer Name of disable taxpayer is entered.
Tax Credit Recap Schedule	Tax Forms States West Virginia Part-year Resident/Nonresident RECAP - Tax Credit Recap Line 15 must have a value

Wisconsin

(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule

Requirement(s) to Print

Form 1	Organizer States Add States/Cities Wisconsin Select Resident
Form 1-ES Estimated Tax	Organizer Estimate and Extension Package Estimate and Extension Package Generate Batch for Estimates AND (Organizer States Common State Estimates Select something other than "Suppress compute and print OR Organizer States Common State Estimates Blank)
Form 1-ES Extension	Organizer Payments and Extensions Extensions State Options and Payments WI Select something other than "Not applicable"
Form 1NPR	Organizer States Add States/Cities Wisconsin Select Nonresident
Form 804	Organizer States Wisconsin General Information Claim for Decedents Wisconsin Inc Ref Check box to Generate form 804
Form 827	Organizer States Wisconsin Statement of Minnesota Residency Populate
Form A-115	Organizer States WI Estimated Tax Check box "Prepay 100% of next year"
Form A-222	Organizer States Wisconsin General Information Power of Attorney Check box "Generate Form A-222"
Form EIC-A	Tax Forms States WI EIC-A Line 1 is populated and (Is resident or nonresident)
Form EPV	Organizer E-file Enable/Create WI Enable E-file

Form H	Tax Forms States WI Sch H Page 2 Line 19 has an amount
Form W-RA	Organizer E-file Enable/Create WI Enable E-file and Tax Forms States WI W-RA Fields are populated
HomesteadCreditNotes	
Property Tax Bill/Closing Statement and Sale of Home Information	Organizer States WI Credits Homestead Credit Property Tax Bill/ Sale of Home Inform Type of Owner Make a selection Or Organizer States WI Credits Homestead Credit Property Tax Bill/ Sale of Home Inform Owner Type Make a selection Or Tax Forms States WI Sch H - Homestead Credit Property Tax Bill/Sale of Home Section 2 Line 1 populate Or Tax Forms States WI Sch H - Homestead Credit Property Tax Bill/Sale of Home Claimant purchased populated Or Tax Forms States WI Sch H - Homestead Credit Property Tax Bill/Sale of Home Claimant sold populated
Rent Certificate	Organizer States WI Credits Homestead Credit Rent Certificate Landlord Information/Questions Enter "Name of property owner"
Schedule 2440W	Tax Forms States WI Sch 2440W - Disability Inc Exclusion Line 6 populate
Schedule A01	
Schedule A02	
Schedule A05	
Schedule A06	
Schedule AD	
Schedule AR	Organizer States WI Amended Check box "Amended"
Schedule BD	Tax Forms States WI Sch BD - Business Development Credit Line 3 populate
Schedule CF	Tax Forms States WI Sch CF Code Number populate
Schedule CR	Tax Forms States WI Sch CR Page 1 Line 26 populate Or Tax Forms States WI Sch CR Page 2 Line 40 populate
Schedule CS	Tax Forms WI Sch CS Page 1 Line 4 populate Or Tax Forms WI Sch CS Page 1 Line 10 populate Or Tax Forms WI Sch CS Page 2 Line 21 & 22 populated
Schedule DC	Tax Forms States WI Sch DC Line 9 populate Or Tax Forms States WI Sch DC Line 17 populate
Schedule DE	Tax Forms States WI Sch DE Entity name is populated
Schedule EC	Tax Forms States WI Sch EC Line 3 populate
Schedule ED	Tax Forms States WI Sch ED Line 8 populate Or Tax Forms States WI Sch ED Line 1c exists
Schedule ES	
Schedule FC	Tax Forms States WI Sch FC Questions Populate
Schedule FCA	

Schedule HR	Tax Forms States WI Sch HR Page 1 Line 10 populate Or Tax Forms States WI Sch HR Page 2 Line 14 populate Or Tax Forms States WI Sch HR Page 2 Part III Transferred amount populate
Schedule I	Tax Forms States WI Sch I Page 1 Line 2i populate Or Tax Forms States WI Sch I Page 1 Line 4j populate
Schedule JT	Tax Forms States WI Sch JT Line 5 populate
Schedule LI	
Schedule M	Organizer States Add States/Cities WI Select NR or PY And (Tax Forms States WI Sch M Page 1 Line 21 populate Or Tax Forms States WI Sch M Page 2 Line 46 populate)
Schedule MA-A	Tax Forms States WI Sch MA-A Page 2 Line 18 or Line 19 greater than 0
Schedule MA-M	Tax Forms States WI Sch MA-M Page 2 Line 18 or Line 19 greater than 0
Schedule NOL1 - Deduction	Tax Forms States WI WK 1 - Net Operating Loss Line 25 populate
Schedule NOL2 - Allowable Deduction for NOL Carryforward	Tax Forms States WI Wk 4 - NOL Allowable Deduction Line 9 populate
Schedule NOL3 - Record of NOL Carryback/Carryforward of Losses	No print conditions
Schedule OS	Organizer States WI Credit for Taxes Pd Credit for Taxes Pd Populate
Schedule PS	Tax Forms States WI Sch PS Part 1, Column 1 populate or Part 2, Column D populate
Schedule R	Sch R - Qualified Research Tax Forms States WI Sch R - Research Credits Qualified Research Page 2 Line 18 populate Sch R - Internal Combustion Engines Tax Forms States WI Sch R - Research Credits Internal Combustion Engines Page 1 Line 12b populate or Tax Forms States WI Sch R - Research Credits Internal Combustion Engines Page 1 Line 13b populate Sch R - Energy Efficient Products Tax Forms States WI Sch R - Research Credits Energy Efficient Products Page 1 Line 12b populate or Tax Forms States WI Sch R - Research Credits Energy Efficient Products Page 1 Line 13b populate
Schedule RT	
Schedule SB	
Schedule T	Tax Forms State WI Sch T Page 1 Line 1b, 2b, 4a, 4b,4e or 4f populate
Schedule U	Organizer States WI Penalties and Interest Penalties and Interest Option to Compute and Print Underpayment Penalty Select option 2 or 3
Schedule VC	Sch VC - Page 1 Tax Forms States WI Sch VC Page 1 Line 6 populate Sch VC - Page 2 Tax Forms States WI Sch VC Page 2 Line 15 populate Sch VC - Page 3 Tax Forms States WI Sch VC Page 3 Transfer amount exists
Schedule WD	Tax Forms States WI Sch WD Page 1 Part I Line 8 populate or Tax Forms States WI Sch WD Page 1 Part II Line 17 populate

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