

Federal

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

Form/Schedule	Requirement(s) to Print
FinCEN Form 114: Report of Foreign Bank and Financial Accounts	Form 114 is not suppressed on Organizer Foreign Information Foreign Bank Account Fin Cen Fin Cen - General Information Print Options. + Activate Form 114 checkbox must be checked on Organizer Foreign Information Foreign Bank Account Fin Cen Fin Cen - General Information. + Officer Title must be entered on Organizer Foreign Information Foreign Bank Account Fin Cen Fin Cen - General Information.
FinCEN Form 114a: Record of Authorization to Electronically File FBARs	Form 114 is not suppressed on Organizer Foreign Information Foreign Bank Account FinCen FinCen - General Information Print Options. + Activate Form 114 checkbox must be checked on Organizer Foreign Information Foreign Bank Account FinCen FinCen - General Information. + Officer Title must be entered on Organizer Foreign Information Foreign Bank Account FinCen FinCen - General Information. + Paid Preparer Information checkbox is not suppressed on Organizer General Information Paid Preparer/ERO Information. + Paid Preparer First & Last name must be entered in Organizer General Information Paid Preparer/ERO Information Paid Preparer Information.
Form 1042: Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	Form 1042, Page 1, line 61a > 0
Form 1042S: Foreign Person's U.S. Source Income Subject to Withholding	Recipient entered on Organizer Informational Forms Withholding for Foreign Persons Recipient
Form 1042T: Annual Summary and Transmittal of Forms 1042S	Recipient entered on Organizer Informational Forms Withholding for Foreign Persons Recipient
Form 1065: U.S. Return of Partnership Income, pp. 1-6	For Form 1065, page 6: Not select Print blank Schedules L, M-1, M-2 and K-1, Item L (Overrides next option below), from Organizer Return and Print Options Form 1065, Pages 1, 5 and 1125-A tab Schedules L, M-1, M-2 and K-1, Item L Print Options box + Form 1065, Page 2, Sch B, line 4 is No, or select Print Schedules L, M-1, M-2, K-1, Item L, and Form 1065, Page 1, Item F amounts and detail when Form 1065, Page 2, Schedule B, line 4 is "Yes
Form 1065-X: Amended Return or Administrative Adjustment Request (AAR)	The following option must be selected: Organizer Amended Return Print Options Print Amended Return or Administrative Adjustment Request (AAR) (Form 1065X)
Form 1125-A: Cost of Goods Sold	The following option is selected: Organizer Ordinary Income and Deductions Income Summary Cost of Goods Sold, "Form 1125-A Print Option" section, "Force print Form 1125-A OR one of the following is Yes: (Tax Forms States Federal 1125-A, "8 Cost of goods sold" - has to have a value greater than zero + The following option is not selected: Organizer Ordinary Income and Deductions Income Summary Cost of Goods Sold, "Form 1125-A Print Option" section, "Suppress Form 1125-A")

Form 2848: Power of Attorney and Declaration of Representative	If any data is filled out on form, Tax Form 2848 will print unless suppress print is checked in Organizer Informational Forms Power of Attorney General information
Form 3115: Change in Accounting Method	
Form 3468 - Investment Credit	
Form 3800: General Business Credit	Form 3800 has at least one amount entered under Organizer, Credits, General Business Credit and Form 3800 print is not suppressed.
Form 3840	
Form 4136: Credit for Federal Tax Paid on Fuels (white paper facsimile)	Form 1065 must be activated instead of 1065-B +Organizer Credits Federal Tax Paid on Fuels Data must be enter here.
Form 4255 - Certain Credit Recapture, Excessive Payments, and Penalties	Data has been entered on "Organizer Credits Recapture of Investment Credit Recapture of Investment Credit" or detail screens within that location.
Form 4562: Depreciation and Amortization (Including Information on Listed Property)	Current year depreciation, amortization, special bonus depreciation, Section 179, or Section 179 carryover must exist; Summary 4562 will print when the above is Yes and there is more than one Form 4562 in the return with amounts; Note for Form 4562, Part I (Section 179): Only lines 1, 3, 10, 12, and 13 will print on the activity 4562s when the Summary 4562 prints
Form 4684: Casualties and Thefts	Casualty gain/loss exists OR a casualty property description exists and the form has not been suppressed using the state taxation option for all properties entered; Ponzi box must be checked for Page 3 to print; Page 1 does not apply to 1065 returns so will be left blank
Form 4797: Recomputed Sales of Business Property for AMT	Sale of business property detail exists +Form has not been suppressed using the state taxation option for all properties entered
Form 4797: Sales of Business Property	Sale of business property AMT detail exists and the option to suppress AMT Form 4797 has not been selected on the Sales of Business Property Other Information Organizer and the form has not been suppressed using the state taxation option for all properties entered
Form 5471 Schedule E: Income, War Profits, and Excess Profits Tax Paid or Accrued	
Form 5471 Schedule G-1 - Cost Sharing Arrangement	
Form 5471 Schedule H: Current Earning and Profits	
Form 5471 Schedule I-1: Information for Global Intangible Low-Taxes Income	

Form 5471 Schedule P:
Previously Taxed Earnings
and Profits of US Shareholder
of Certain Foreign
Corporations

Form 5471 Schedule Q - CFC
Income by CFC Income
Groups

Form 5471 Schedule R -
Distributions From a Foreign
Corporation

Form 5471: Information
Return of U.S. Persons with
Respect to Certain Foreign
Corporations

Organizer | General Information | Basic Return Information | Return/Entity Type | Entity type is not top consolidation or sub consolidation + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Return and Print Options for All 5471s | Suppress all 5471s is not marked + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Suppress the Print of | Form 5471 is not marked To print page 2 to 4, Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Print Options for this Foreign Corporation | Foreign corporation is a dormant CFC should not be marked

Form 5471: Schedule J,
Accumulated Earnings and
Profits of Controlled Foreign
Corporation

Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Suppress the Print of | Schedule J is not marked + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Print Options for this Foreign Corporation | Foreign corporation is a dormant CFC should not be marked + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Filer Information | Filer Information | Category of Filer | "4" or "5" is marked

Form 5471: Schedule M,
Transactions Between
Controlled Foreign
Corporation and
Shareholders or Other
Related Persons

Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Suppress the Print of | Schedule M is not marked + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Print Options for this Foreign Corporation | Foreign corporation is a dormant CFC should not be marked + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Filer Information | Filer Information | Category of Filer | "4" is marked

Form 5471: Schedule O,
Organization or
Reorganization of Foreign
Corporation, and Acquisitions
and Dispositions of its Stock

Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Suppress the Print of | Schedule O is not marked + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Print Options | Print Options for this Foreign Corporation | Foreign corporation is a dormant CFC should not be marked + Organizer | Foreign Information | Foreign Corporation | Foreign Corporation | Filer Information | Filer Information | Category of Filer | "2" is marked & Plus data should be there on Part I .

Form 5713: International
Boycott Report

"Generate International Boycott Report" is checked on Organizer | Foreign Information | International Boycott Report | International Boycott Report Information | General Information

Form 5713: Schedule A, International Boycott Factor (Section 999(c)(1))	Generate International Boycott Report" is checked on Organizer Foreign Information International Boycott Report International Boycott Report Information General Information + entry on Organizer Foreign Information International Boycott Report the name of the country being boycotted Schedule A
Form 5713: Schedule B, Specifically Attributable Taxes and Income (Section 999(c)(2))	"Generate International Boycott Report" is checked on Organizer Foreign Information International Boycott Report International Boycott Report Information General Information + entry on Organizer Foreign Information International Boycott Report the name of the country being boycotted Schedule B.
Form 5713: Schedule C, Tax Effect of International Boycott Provisions	Generate International Boycott Report" is checked on Organizer Foreign Information International Boycott Report International Boycott Report Information General Information + Line 1a or Line b completed
Form 5884: Work Opportunity Credit	Data has been entered on "Organizer Credits Work Opportunity Credit," or "Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15"
Form 6252: Installment Sale Income	Installment sale Gain and current year collections exists and the form has not been suppressed using the state taxation option for all properties entered
Form 6252: Recomputed Installment Sale Income for AMT	Installment sale AMT Gain and current year collections exists and the option to suppress has not been selected on the sales of business property Other Information Organizer and the form has not been suppressed using the state taxation option for all properties entered
Form 6478: Alcohol and Cellulosic Biofuel Fuels Credit	Data has been entered on "Organizer Credits Biofuel Producer Credit," or "Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15"
Form 6765 - Credit for Increasing Research Activities	"Data has been entered on ""Organizer Credits Research Credit/Payroll Tax Credit for Increasing Research,"" OR ""Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15"" The form will print if just Yes or No boxes are marked on Line 17 or line 34."
Form 6781: Gains and Losses from Section 1256 Contracts and Straddles	Contracts and Straddles amounts exist OR Section 1256 identification of account description exists on 6781, line 3 OR a Section A or Section B description exists
Form 7004: Application for Automatic 6-Month Extension of Time To file, Certain Business Income Tax, Information, and Other Returns	"Under Organizer/Extension Information drop-down, select ""return is on extension, Print Form 7004""."
Form 7205: Energy Efficient Commercial Buildings Deduction	Tax Forms Federal 7205 - Energy Efficient Bldg must have an amount AND Organizer Ordinary Income and Deductions Deductions Summary Energy Efficient Commercial Bldg tab must have Form 7205 not forced print forced OR Form 7205 force print box checked.
Form 7207: Advanced Manufacturing Credit	

Form 7210: Clean Hydrogen
Production Credit

Form 7211 - New form 2024
applies to tax years ending in
2025 - Release status shown
at Organizer | Credits | Tax
Year 2024 Updates and
Changes

Form 7213: Nuclear Power
Production Credit

Form 7217 Partner's Report of
Property Distributed by a
Partnership

Form 7218 - New form 2024
applies to tax years ending in
2025 - Release status shown
at Organizer | Credits | Tax
Year 2024 Updates and
Changes

Form 8082: Notice of
Inconsistent Treatment or
Administrative Adjustment
Request (AAR)

Name of pass-through entity must be exist on Organizer | Informational Forms |
Notice of Inconsistent Treatment or AAR

Form 8275: Disclosure
Statement

Form 8275 will print as soon as Disclosure description is entered. Organizer |
Informational Forms | Disclosure Statement | Disclosure | Disclosure Information

Form 8275-R: Regulation
Disclosure Statement

Form 8275 -R will print as soon as Disclosure description is entered. Organizer |
Informational Forms | Disclosure Statement | Disclosure | Disclosure Information

Form 8283: Noncash
Charitable Contributions

Organizer | Informational Forms | Noncash Charitable Contribution | Add new
Contributions Over \$500 and \$5000.

Form 8308: Report of Sale or
Exchange of Certain
Partnership Interests

Must check "Print Form 8308 with partnership return" in Organizer | Partner
Information | Transfer of Interest | Transfer Options Must have at least 1 transfer
entered in Organizer | Partner Information | Transfer of Interest

Form 8453-PE: U.S.
Declaration for an IRS E-file
Return

If 1065 and no 1065-B: If the client selects Binary Signature and not suppressed

Form 8586: Low-Income
Housing Credit

If either Part I or Part II of form the number of 8609s attached is populated OR
Amount shown for either Part I or Part II for current year credits OR Has been a
decrease in qualified basis in the current year in either Part I or Part II.

Form 8594: Asset Acquisition
Statement Under Section
1060

Form 8594 will print as soon as Name of Other Party is entered in Organizer |
Informational Forms | Asset Acquisition | Add new Name of Other Party

Form 8609: Low-Income Housing Credit Allocation Certification	If in Organizer, Activity Information for Rental Real Estate, for Other Rental Real Estate, or for Multiple Trade of Business, under 8609 If box checked for 1st time submission to the Low Income Housing Unit If checkbox is marked for Forced Print Form 8609 even is not marked first time submission.
Form 8609-A: Schedule A Low Income Housing Annual Statement	If Organizer, Activity, Residential Rental Real Estate, or Other Rental Real Estate, of Multiple Trade of Business there is amount shown for Eligible Basis of Property for Credit +If Lines 16 or 18 has an amount +If box is checked to force print.
Form 8611: Recapture of Low-Income Housing Credit	If form shows address of building +Either Line 12 or Line 14 is populated
Form 8621: Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund	One of the following lines must have data: line 10c, 15e, 15f, 16b, 16c, 16e, 17
Form 8697: Interest Computation Under the Look-Back Method for Completed Long-Term Contracts	Organizer Informational Forms Interest Comp for LT Contracts Lock-Back for LT Contracts General Information, choose the correct print option +Line 9 or line 10 has amount
Form 8716: Election to Have a Tax Year Other than a Required Tax Year	If Line 3, Line 4, or Line 5 (Sec 444) populated on form
Form 8752: Required Payment or Refund	If form not suppressed, and Item B (first tax year), or Line 11 or Line 12 on form are populated
Form 8804: Annual Return for Partnership Withholding Tax (Section 1446)	Form 8804 print is not suppressed in Organizer Foreign Information IRC Sec 1446 Withholding Tax IRC Sec 1446 Information. + There must be an amount in Tax Forms IRC Sec 1446 Withholding Tax 8804 Page 2, line 7 or line 9, or Force print Form 8804 must be selected in Organizer Foreign Information IRC Sec 1446 Withholding Tax IRC Sec 1446 Information. + Page 2 of Form 8804 will only print if there are amounts on Tax Forms IRC Sec 1446 Withholding Tax 8804 Page 2, line 7 or line 9.
Form 8805: Foreign Partner's Information Statement of Section 1446 Withholding Tax	A partner must be marked as Foreign in Organizer Partner Information Partner by Partner Data Partner Name Partner Information AND the partner's name must be present in Tax Forms IRC Sec 1446 Withholding Tax 8805 Partner Name, Page 1 line 1a. +(There must be an amount in Tax Forms IRC Sec 1446 Withholding Tax 8805 Partner Name, Page 1, line 9 or 10. OR + Force Print Form 8805 must be selected in Organizer Foreign Information IRC Sec 1446 Withholding Tax IRC Sec 1446 Information.) * To print Copy A, B, C, or D, the print can't be suppressed in Organizer Foreign Information IRC Sec 1446 Withholding Tax IRC Sec 1446 Information.
Form 8813: Partnership Withholding Tax Payment Voucher (Section 1446)	Each voucher must have an amount in Tax Forms IRC Sec 1446 Withholding Tax 8813 1st, 2nd, 3rd, or 4th Quarter, Page 1, line 2.
Form 8820: Orphan Drug Credit	Data has been entered on Organizer Credits Orphan Drug Credit or Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15

Form 8822-B: Change of Address - Business	If New address or New business location entered on Tax Forms 8822-B, the form will print.
Form 8824: Like-Kind Exchanges	Like-kind exchange detail exists and there is a description of the like-kind property given up and the like-kind exchange is not excluded from Federal
Form 8825: Rental Real Estate Income and Expenses of a Partnership or an S Corporation	Any of the following has a value greater than zero: Tax Forms Federal 8825 Summary, Lines 18a through 21
Form 8826: Disabled Access Credit	Data has been entered on Organizer Credits Disabled Access Credit or Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8830: Enhanced Oil Recovery Credit	
Form 8832: Entity Classification Election	Form line 1a Or line 1b has to be checked.
Form 8833: Treaty-Based Return Position Disclosure Under Section 6114 or 7701(b)	Treaty country must be entered on Organizer Foreign Information Treaty-Based Position
Form 8835: Renewable Electricity Production Credit	
Form 8838-P: Consent to Extend Time to Assess Tax Pursuant to the Gain Deferral Method (Section 721(c))	At least one partnership has been created on "Organizer Foreign Information Foreign Partnership + At least one Schedule O has been created on "Organizer Foreign Information Foreign Partnership <name> Transfer Property to Foreign Ptnrship" with the mandatory entry selected and all mandatory entries have been completed at "Organizer Foreign Information Foreign Partnership <name> Transfer Property to Foreign Ptnrship Extend Time to Assess Tax The suppression options for the whole partnership or for category of filer are marked at the partnership level on "Organizer Foreign Information Foreign Partnership <name> Foreign Partnership Information Print Options
Form 8842: Election to Use Different Annualization Records for Corporation Estimated Tax	Option 1 or 2 must be selected in Organizer Foreign Information IRC Sec 1446 Withholding Tax IRC Sec 1446 Information, Form 8842 section.
Form 8844: Empowerment Zone Employment Credit	Data has been entered on Organizer Credits Empowerment Zone Credit OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8846: Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips	Data has been entered on Organizer Credits Credit for Employer Taxes Paid OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15

Form 8858: Information Return of U.S. Persons with Respect to Foreign Disregarded Entities	Organizer Foreign Information Foreign Disregarded Entity Foreign Disregarded Entity Print Options for All 8858s Suppress the print of all Forms 8858s is not marked + Organizer Foreign Information Foreign Disregarded Entity Foreign Disregarded Entity Foreign Disregarded Entity Print Options Suppress the print of Form 8858 is not marked + To print page 2, Organizer Foreign Information Foreign Disregarded Entity Foreign Disregarded Entity Foreign Disregarded Entity Print Options Print Foreign disregarded entity as a dormant FDE should not be marked
Form 8858: Schedule M: Return of U.S. Persons with Respect to Foreign Disregarded Entities	Organizer Foreign Information Foreign Disregarded Entity Foreign Disregarded Entity Print Options for All 8858s Suppress the print of all Forms 8858s is not marked + Organizer Foreign Information Foreign Disregarded Entity Foreign Disregarded Entity Foreign Disregarded Entity Print Options Suppress the print of Form 8858 is not marked + Organizer Foreign Information Foreign Disregarded Entity Foreign Disregarded Entity Foreign Disregarded Entity Print Options Suppress the print of Schedule M is not marked + Organizer Foreign Information Foreign Disregarded Entity Foreign Disregarded Entity Foreign Disregarded Entity Print Options Print Foreign disregarded entity as a dormant FDE should not be marked
Form 8864: Biodiesel Fuels Credit	Data has been entered on Organizer Credits Biodiesel Fuels Credit OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8865: Return of U.S. Persons With Respect to Certain Foreign Partnerships	At least one partnership has been created on Organizer Foreign Information Foreign Partnership +Suppression options for the whole partnership or for category of filer are marked at the partnership level on Organizer Foreign Information Foreign Partnership <name> Foreign Partnership Information Print Options
Form 8865: Schedule G: Statement of Application of the Gain Deferral Method Under Section 721(c)	
Form 8865: Schedule H: Acceleration Events and Exceptions Reporting Relating to Gain Deferral Method Under Section 721(c)	
Form 8865: Schedule K-1, Partner's Share of Income, Credits, Deductions, etc.	At least one partnership has been created on Organizer Foreign Information Foreign Partnership +At least one partner has been created on Organizer Foreign Information Foreign Partnership <name> Partner Information Partner Information +Suppression options for the whole partnership or for category of filer are marked on Organizer Foreign Information Foreign Partnership <name> Foreign Partnership Information Print Options, or at the partner level on Organizer Foreign Information Foreign Partnership <name> Partner Information Partner Information
Form 8865: Schedule K-2: Partners' Distributive Share Items—International	

Form 8865: Schedule K-3:
**Partner's Share of Income,
Deductions, Credits,
etc.—International**

Form 8865: Schedule O,
Transfer of Property to a
Foreign Partnership (under
Section 6038B)

At least one partnership has been created on Organizer | Foreign Information | Foreign Partnership +At least one Schedule O has been created on Organizer | Foreign Information | Foreign Partnership | <name> | Transfer of Property to Foreign Ptnrshp with the mandatory entry selected. +Suppression options for the whole partnership or for category of filer are marked at the partnership level on Organizer | Foreign Information | Foreign Partnership | <name> | Foreign Partnership Information | Print Options

Form 8865: Schedule P,
Acquisitions, Dispositions,
and Changes of Interests in a
Foreign Partnership (under
Section 6046A)

At least one partnership has been created on Organizer | Foreign Information | Foreign Partnership +At least one entry for Schedule P has been created on Organizer | Foreign Information | Foreign Partnership | US <name> | Acquisitions, Dispositions, and Changes +Suppression options for the whole partnership or for category of filer are marked at the partnership level on Organizer | Foreign Information | Foreign Partnership | <name> | Foreign Partnership Information | Print Options

Form 8866: Interest
Computation Under the Look-
Back Method for Property
Depreciated Under the
Income Forecast Method

Oragnizer|information Forms|Interest Comp for Prop Depr|Lock-Back for Property Depreciated|General Information|choose the correct print option + Line 9 OR line 10 has amount

Form 8873: Extraterritorial
Income Exclusion

+ The form cannot be marked as suppressed in Tax Forms | 8873 - Extraterritorial Income Exclusion | 8873 Exclusion Summary. + A product line must be entered in Organizer | Foreign Information | Extraterritorial Income | Product Line. + A basis of reporting must be selected in Organizer | Foreign Information | Extraterritorial Income | Mandatory - Basis of Reporting.

Form 8874: New Markets
Credit

Data has been entered on Organizer | Credits | New Markets Credit | New Markets Credit OR Organizer | Activity Information | Pass-Through Entity |<name> | Pass-Through Entity Activity | K-1 Line, Lines 1-15

Form 8881: Credit for Small
Employer Pension Startup
Costs

Data has been entered on Organizer | Credits | Credit for Employer Startup Cost OR Organizer | Activity Information | Pass-Through Entity |<name> | Pass-Through Entity Activity | K-1 Line, Lines 1-15

Form 8882: Credit for
Employer-Provided Child
Care Facilities and Services

Data has been entered on Organizer | Credits | Credit for Childcare Facilities OR Organizer | Activity Information | Pass-Through Entity |<name> | Pass-Through Entity Activity | K-1 Line, Lines 1-15

Form 8883: Asset Allocation
Statement Under Section 338

Treaty-Based Position must be entered on Organizer | Foreign Information | Treaty-Based Position

Form 8886: Reportable
Transaction Disclosure
Statement

Name of Reportable Transaction must exist on Organizer | Informational Forms | Reportable Transaction Disclosure + Not suppress Form 8886 with partnership return on Organizer | Informational Forms | Reportable Transaction Disclosure | Return Options

Form 8896: Low Sulfur Diesel
Fuel Production Credit

Data has been entered on Organizer | Credits | Low Sulfur Diesel Fuel Credit OR Organizer | Activity Information | Pass-Through Entity |<name> | Pass-Through Entity Activity | K-1 Line, Lines 1-15

Form 8900: Qualified Railroad Track Maintenance Credit	Data has been entered on Organizer Credits Qualified Railroad Track Credit Qualified Railroad Track Credit OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8904: Credit for Oil and Gas Production From Marginal Wells	Data has been entered on Organizer Credits Production From Marginal Wells OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8906: Distilled Spirits Credit	Data has been entered on Organizer Credits Distilled Spirits Credit OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8908: Energy Efficient Home Credit	Data has been entered on Organizer Credits Energy Efficient Home Credit OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8910: Alternative Motor Vehicle Credit - Obsolete 2024	Obsolete form
Form 8911 and 8911 Sch A: Alternative Fuel Vehicle Refueling Property Credit	
Form 8912: Credit to Holders of Tax Credit Bonds	Data has been entered on Organizer Credits Holders of Tax Credit Bonds Holders of Tax Credit Bonds OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8916-A: Supplemental Attachment to Schedule M-3	Sch M-3 is printing in the return + Sch M-3, Part II and Part III are not suppressed on Organizer Balance Sheet and Reconciliation Sch C, Sch M-3 and Form 8916-A Sch C, Sch M-3 and Form 8916-A Sch M-3 and Form 8916-A Options General Options + Form 8916-A, Part I, line 8 has data, or Form 8916-A, Part II, line 6 has data, or Form 8916-A, Part III, line 5 has data
Form 8925: Report of Employer-Owned Life Insurance Contracts	Data has been entered from Organizer Informational Forms Employer-Owned Life Ins Contracts - Number of employees at the end of tax year.
Form 8932: Credit for Employer Differential Wage Payments	Data has been entered on Organizer Credits Employer Diff Wage Pmt Credit OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8933 - Major IRS changes 2024 - Release status shown at Organizer Credits Tax Year 2024 Updates and Changes	
Form 8936: Clean Vehicle Credits	
Form 8936-A: Clean Vehicle Credit Amount	
Form 8941: Credit for Small Employer Health Insurance Premiums	Data has been entered on Organizer Credits Small Employer Ins Premium OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15

Form 8949: Sales and Other Dispositions of Assets	Sch D has an amount on lines 1b, 2, 3, 8b, 9 and/or 10 +Detail was entered on the Capital Gains and Losses Organizer
Form 8974: Qualified Small Business Payroll Tax Credit	The return is marked as an eligible small business on Organizer Credits Credit for Increasing Research Credit for Increasing Research +Mandatory entry for the initial reporting period has been marked on Organizer Credits Credit for Increasing Research Small Business Payroll Tax. Form only prints through Selected Federal Forms, because it is not an income tax form and cannot be filed with the corporate return.
Form 8975: Country-by-Country Report	The reporting code has been selected on Organizer Foreign Information Country by Country Reporting Country-by-Country Report +All mandatory entries have been completed on at least 2 Schedule A forms have been completed under Organizer Foreign Information Country by Country Reporting Tax Jurisdiction and Constituent Info. View the Organizer screens for required data as it changes based on the country selected.
Form 8979: Partnership Representative Revocation, Designation, and Resignation Form	Data has to be entered on Organizer Informational Forms Partnership Representative Revoc/Assign, "Form 8979 Options" section, "Reason for filing" drop down box
Form 8985: Pass-Through Statement Adjustment Tracking Report	The Form Indication and Entity Submitting fields on Organizer, Informational Forms, Sections 6226 and 6227-Adjustments, Basic Information must have selections, Parts IV or V, together, must have at least one amount, and the print suppression option related to Form 8985 must not be selected on Organizer, Informational Forms, Sections 6226 and 6227-Adjustments, Basic Information. Note: Per the IRS schema, Options 3 or 4 must be selected for the entity submitting field to e-file. Do not suppress the print or e-file on Organizer, Informational Forms, Sections 6226 and 6227-Adjustments, Basic Information to e-file Form 8985.
Form 8986: Partner's Share of Adjustment(s) to Partnership-Related Item(s)	Partner allocations must be enabled unless importing onto the Tax Form \Workpapers for Form 8986, e.g., Direct K-1 Import. The Form Indication and Entity Submitting fields on Organizer, Informational Forms, Sections 6226 and 6227-Adjustments, Basic Information must have selections, Parts V or VI, together, must have at least one amount, and the print suppression options must not be selected. Do not suppress the print or e-file on Organizer, Informational Forms, Sections 6226 and 6227-Adjustments, Basic Information to e-file Form 8986. Note 1: A specific partner's Form 8986 can be suppressed from printing and e-filing by checking the Form 8986 suppression checkbox on Organizer, Partner Information, Partner by Partner Data, Form 8986. ALL Form 8986 in a return can be suppressed from print and e-file by checking the suppression checkbox on Organizer, Informational Forms, Sections 6226 and 6227-Adjustments, Basic Information. Note 2: Per the IRS schema, Options 3 or 4 must be selected for the entity submitting field to e-file. Do not suppress the print or e-file on Organizer, Informational Forms, Sections 6226 and 6227-Adjustments, Basic Information to e-file Form 8986. CAUTION: If using Direct K-1 Import for Form 8986, do not enable partner allocations.
Form 8990: Limitation on Business Interest Expense IRC 163(j)	If no suppression under Federal organizer Informational forms Limitation on Bus Interest Expense Adjustment, and 1065 page 3 line 23 is No and line 24 is Yes.

Form 8992: US Shareholder Calculation of Global Intangible Low-Taxes Income (GILTI)	Generate the form under Federal Organizer Foreign information Shareholder Calculation of GILTI
Form 8994: Employer Credit for Paid Family and Medical Leave	Data has been entered on Organizer Credits Paid Family and Medical Leave OR Organizer Activity Information Pass-Through Entity <name> Pass-Through Entity Activity K-1 Line, Lines 1-15
Form 8996: Qualified Opportunity Fund	8996 page 1 line 2 is Yes
Form 8997: Initial and Annual Statement of Qualified Opportunity Fund (QOF) Investments	8997 Part I or II or III or IV has data
Form 970: Application To Use LIFO Inventory Method	If Line 1 Listing of Tyes of Goods Converted to LIFO method contains a listing of items
Form 982: Reduction of Tax Attributes Due to Discharge of Indebtedness (and Section 1082 Basis Adjustment	Form line 1 a Or b OR c Or D must be checked.
Form T: Forest Activities Schedule	In legal entities only, data is entered on Organizer Informational Forms Forest Activities Schedule. If transactional summary entries are made, no detail entries will print.
Income from Other Pass-through Entities	There is a value available on Tax Forms Pass-Through Entity Pass-Through Activity, "Activity Name + The following option is not selected: Organizer Consolidations Step 2 - Select Print and Calculations Print Options, "Federal Print Options" section, "Print detail by division with company name of division for federal and / or state purposes + The following option is not selected: Organizer Consolidations Step 2 - Select Print and Calculations Print Options, "Federal Print Options" section, "Print detail by division without company name of division for federal return only + The following option is not selected: Organizer General Information Return and Print Options Other Forms, Compute Options, "Suppress all Income From Other Pass-Thru Entities Schedules
Multiple Trade or Business Income	There is a value available on Organizer Activity Information Multiple Trade or Business Multiple Trade or Business Activity Income and Expenses, "Activity number (Mandatory)
Reconciliation of Preparer Entries	The following options is not selected: Organizer Comparison and Reconciliation Reconciliation Income-Reconciliation, "Suppress the printing of the preparer's reconciliation schedule + The following option is not selected: Organizer General Information Basic Return Information Entity Information, "Entity Type" section, "Enable Form 1065-B instead of Form 1065
Rent and Royalty Income and Expenses	There is a value available on Organizer Activity Information Royalty Activity Royalty Activity Income and Expense, "Activity number (Mandatory) + There is a value available on Organizer Activity Information Royalty Activity Royalty Activity Income and Expense, "Property name + At least one of the amounts on Tax Forms Royalty Income Royalty Income has a value greater than zero

Schedule A (Form 8804): Penalty for Underpayment of Estimated Section 1446 Tax by Partnerships	Part I needs to be completed in Tax Forms IRC Sec 1446 Withholding Tax Schedule A (Form 8804), Page 1.
Schedule B-2: Election Out of the Centralized Partnership Audit Regime	The answer to the following is "Yes": Tax Forms Federal 1065 - US Partnership Return of Income Page 3, "Is the partnership electing out of the centralized partnership audit regime under section 6221(b)?"
Schedule C: Additional Information for Schedule M-3 Filers	The condition to print Schedule M-3 has been met + The following option is not set to "Suppress": Organizer Balance Sheet and Reconciliation Sch C, Sch M-3 and Form 8916-A Sch C, Added Information..., "Print Option + The following option is not selected: (Organizer Balance Sheet and Reconciliation Sch C, Sch M-3 and Form 8916-A Sch M-3 and Form 8916-A Options, "General Options" section, "Do not complete Schedule M-3, Parts II and III UNLESS The following option is not set to "Force Print": Organizer Balance Sheet and Reconciliation Sch C, Added Information..., "Print Option")
Schedule D: Capital Gains and Losses	Long term or Short term capital gains/losses detail exists with a current year gain/loss amount and the schedule has not been suppressed using the state taxation option for all properties entered
Schedule F: Profit or Loss From Farming	There is a value available on Organizer Activity Information Farm Farm Activity Activity Information, "Farm name (Mandatory) + Tax Forms Schedule F Page 1, Line 34 has a value greater than zero + The following option is not selected: Organizer Activity Information Farm Farm Activity Activity Information, "Suppress this activity from flowing into the return
Schedule K-1: Partners' Share of Income, Credits, Deductions, etc.	Suppress Schedule K-1 and partner activity schedules can NOT be checked in Organizer General Information Return and Print options 3rd tab Sch K, K-1 and Activity Schedule +Form 1065B can NOT be enabled in Organizer General Information Basic Return Information +Must have at least 1 partner and partner number entered
Schedule K-2: Partners' Distributive Share Items- International	Organizer, Foreign Information, Ptr Distributive Share-International, K-2,K-3 Activation and General Info-Activate Schedules K-2 and K3 field is checked, Schedule K-2 has an amount, and Schedule K-2 is not suppressed
Schedule K-3: Partner's Share of Income, Deductions, Credits, etc-International	Organizer, Foreign Information, Ptr Distributive Share-International, K-2,K-3 Activation and General Info-Activate Schedules K-2 and K3 field is checked, Schedule K-3 has an amount, and Schedule K-3 is not suppressed
Schedule L: Balance Sheets per Books	The following option is not selected: Organizer General Information Return and Print Options Form 1065, Pages 1, 5, and 1125-A, "Print blank Schedules L, M-1, M-2 and K-1, Item L (Overrides next option below) + The following does not equal "Yes": (Tax Forms Federal 1065 Page 2, "Line 4 UNLESS The following option is selected: Organizer General Information Return and Print Options Form 1065, Pages 1, 5 and 1125-A, "Print Schedules L, M-1, M-2, K-1, Item L, and Form 1065, Page 1, Item F amounts and detail when Form 1065, Page 2, Schedule B, line 4 is "Yes")

Schedule M-1: Reconciliation of Income (Loss) per Books with Income (Loss) per Return	Form 1065 is in the return + Not select Print blank Schedules L, M-1, M-2 and K-1, Item L (Overrides next option below), from Organizer Return and Print Options Form 1065, Pages 1, 5 and 1125-A tab Schedules L, M-1, M-2 and K-1, Item L Print Options box + Form 1065, Page 2, Sch B, line 6 is No, or select Print Schedules L, M-1, M-2, K-1, Item L, and Form 1065, Page 1, Item F amounts and detail when Form 1065, Page 2, Schedule B, line 6 is "Yes + Sch M-3 is not in the return OR if Sch M-3 is in the return but select to Force print M-1 on the Organizer Balance Sheet and Reconciliation Sch C, Sch M-3 and Form 8916-A Sch C, Sch M-3 and Form 8916-A Sch M-3 and Form 8916-A Options Print Options
Schedule M-2: Analysis of Partners' Capital Accounts	Form 1065 is in the return + Not select Print blank Schedules L, M-1, M-2 and K-1, Item L (Overrides next option below), from Organizer Return and Print Options Form 1065, Pages 1, 5 and 1125-A tab Schedules L, M-1, M-2 and K-1, Item L Print Options box + Form 1065, Page 2, Sch B, line 6 is No, or select Print Schedules L, M-1, M-2, K-1, Item L, and Form 1065, Page 1, Item F amounts and detail when Form 1065, Page 2, Schedule B, line 6 is "Yes
Schedule M-3: Net Income (Loss) Reconciliation for Certain Partnerships	Sch M-3 print is not suppressed on Organizer Balance Sheet and Reconciliation Sch C, Sch M-3 and Form 8916-A Sch C, Sch M-3 and Form 8916-A Sch M-3 and Form 8916-A Options Print Options + If Form 1065 is in the return, Form 1065, Page 2, Sch B, line 6 is No + Sch M-3, Page 1, Item A, or B or C or D has data. Note: Sch M-3, Page 1 only prints for single company and divisional consolidation. Will not print for division.
Section 199A (QBI) Unadjusted Basis for 2.5% Limitation	QBI (Section 199A) 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; if the excluded from Section 199A check box is checked on an activity, the schedule will not print for that activity

Alabama

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

Form/Schedule	Requirement(s) to Print
Form 65	Alabama is activated on the State and City Activation Organizer +Alabama State Forms are NOT suppressed on Organizer States Common State Print Suppression
Form AL8453-B	I have read and agree with the certification per details on Form 8453-B" must be checked on the AL Signature Authorization AL8453-B Organizer +Alabama Form Composite e-file must be enabled on Organizer Common State State E-file Enable/Create Returns
Form AL8453-PTE	Partnership: "I have read and agree with the certification per details on Form 8453-PTE" must be checked on the AL Signature Authorization AL8453-PTE Organizer +Alabama Form 65 e-file must be enabled on Organizer States Common State State E-file Enable/Create Returns. Composite: "I have read and agree with the certification per details on Form 8453-PTE" must be checked on the AL Signature Authorization AL8453-PTE Organizer +Alabama Form Composite e-file must be enabled on Organizer States Common State State E-file Enable/Create Returns.

Form BPT-V	Data is on the amount paid field on this tax form; also, "Force print Form PPT" must be checked on the AL Privilege Tax Basic Information Organizer OR the "Print Form BPT-IN (Override)" box must be checked on the AL Initial Privilege Tax Return Basic Information Organizer
Form EPT	Generate EPT checkbox is check from Organizer States Alabama Electing Pass-Through Entity General information
Form NRA-R	"Include nonresident partner in Schedule NRA-R" box for Alabama is checked on the Partner Information State Partner Information Organizer.
Form PTE-C	State composite return box for Alabama is checked on the Partner Information State Partner Information Organizer +Form 65, Sch K-1, lines G through M totals to greater than zero OR the "Force print Form PTE-C" box is checked on the AL Composite Return Organizer
Form PTE-R	"Force print Form PTE-R" box is checked on the AL Composite Return Relief of Composite Payment Organizer
Form PTE-V	State composite return box for Alabama is checked on Organizer Partner Information State Partner Information +Form 65, Sch K-1, lines G through M totals to greater than zero OR "Force print Form PTE-C" box is checked on the AL Composite Return Organizer +For a voucher to print, it must have data on the amount paid field +PTE-V composite payment tax form will NOT print if the "Form PTE-V composite payment" print suppression box has an entry on Organizer States Alabama Return Options
Schedule 65K-1	Partner name and the "Form K-1" box on the AL Return Options Organizer is NOT checked to suppress print
Schedule 65L	"Sch K, K-1, L, M-1....." cannot be suppressed from Organizer General information Return and Print Options Sch K, K-1 and Activity Schedules
Schedule 65P	Pass-through entities must be present from Federal.
Schedule 65QIP-C	Qualified Investment Partnership is checked on Form 65, Page 1
Schedule B	Description must be present.
Schedule EPT K1	Generate EPT checkbox is check from Organizer States Alabama Electing Pass-Through Entity General information
Schedule EPTC	Section D Line F3 must have data or Section C Column 5 must have data.
Schedule NRC	Include nonresident partner in Schedule NRC" must be checked for a partmer on Organizer Partner Information State Partner Information for a partner. Note: Page 2 will not print without some data.
Schedule OZ	Alabama State Forms are NOT suppressed on Organizer States Common State Print Suppression and Schedule OZ line 1a description must have data.
Schedule PAB	A recipient related member must be entered on the AL Intangible/Interest Expense Add Back Recipient related member Organizer; there must be more than 4 recipient related members to print page 2
Schedule PC	Sch PC, Page 3, Part P has data on line 1 for total credits allowable Note: If an entry is made on this tax form line and no data is on Sch PC, Page 2, Page 2 will not print

Schedule PTE AJA	Form must have data.
Schedule PTE-CK-1	Page 1 - State composite return box for Alabama is checked on the Partner Information State Partner Information Organizer +Form 65, Sch K-1, lines G through M totals to greater than zero for at least 1 nonresident partner Page 2 - State composite return box for Alabama is checked on the Partner Information State Partner Information Organizer +Form 65, Sch K-1, lines G through M totals to greater than zero for at least 12 nonresident partner and the partner does not print on PTE-CK1, page 1

Alabama Privilege

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

Form/Schedule	Requirement(s) to Print
Form PPT	Data on Form PPT, page 1, line 14 (net tax due) OR data on Form PT, page 1, line 8 (privilege tax due) OR data on Form PT, page 1, line 15 (payment due with return) OR data on Form PT, page 1, line 16 (amount to be refunded) OR Form 65, page 4, line 2 is checked that a business privilege tax return was filed for this entity; also, this must not be an initial return OR "Force print Form PPT" must be checked on the AL Privilege Tax Basic Information Organizer
Schedule BPTE	
Schedule BPT-E	Tax Form PPT, page 1, line 18 (Family LLE Election attached) box is checked; also, "Force print Form PPT" must be checked on the AL Privilege Tax Basic Information Organizer
Worksheet BPTNW	"Force print Form BPT-NW" box is checked on the AL Privilege Tax Basic Information Organizer; also, this must not be an initial return OR "Force print Form PPT" must be checked on the AL Privilege Tax Basic Information Organizer
Worksheet BPTNWPPT	Form BPT-IN" box is NOT checked on the AL Return Options Organizer; also, Initial Return must be checked on Form 65, page 1 OR the "Print Form BPT-IN (Override)" box must be checked on the AL Initial Privilege Tax Return Basic Information Organizer

Alaska

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

Form/Schedule	Requirement(s) to Print
Form 6310	Line 4 must have a value.
Form 6323	Must have a list on Organizer States Alaska Credits LNG Storage Facility Credit
Form 6325	Must have a list on Organizer States Alaska Credits Veteran Employment Tax Credit
Form 6900	Alaska is active in the return (Organizer States State and City Activation)
Schedule B Corp/Partnership Partners	At least one partner with a Partner Number must be present within the return in the Organizer Partner information Partner by Partner Data [Partner Name]
Schedule B Natural Persons	At least one partner with a Partner Number must be present within the return in the Organizer Partner information Partner by Partner Data [Partner Name]

Arizona

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

Form/Schedule	Requirement(s) to Print
120EXT	The following option is selected: Organizer States Common State Basic Return Information "Return Information" tab, "Return on Extension" column, "Arizona" row
165 Schedule K-1	The following option is not selected: Organizer States Arizona Return Options, "Print Suppression" section, "Schedules K-1 (print form 165 only) + At least one partner is available on Organizer Partner Information + the following has to be Yes: (A partner is a resident of Arizona + A partner is a Estate, Fiduciary, Disregarded Entity, Grantor Trust, Individual, Nominee, IRA, Trust or Foreign Government)
165 Schedule K-1 (NR)	The following option is not selected: Organizer States Arizona Return Options, "Print Suppression" section, "Schedules K-1 (print form 165 only) + At least one partner is available on Organizer Partner Information + A partner is a nonresident of Arizona
Form 140NR	At least one partner has elected to be part of the Arizona Composite return on Organizer Partner Information Partner by Partner Data Partner Name State Partner Information, "State Composite Returns" section
Form 165	State is active
Form 204	The following option is selected: Organizer States Arizona Composite Return Extension Information, "Return on extension + The following option is not selected: Organizer States Arizona Composite Return Extension Information, "Suppress extension + One of the following must be Yes: (Tax Forms States Arizona Form 204, "1 Tax liability" - has to have a value greater than zero OR The following option must be selected: Organizer States Common State Extension Options, "Force print all state extensions even without tentative tax amounts")
SchAR1100BIC	
SchMSP	Data must be present on Tax Forms States Arizona Schedule MSP line A3

Arkansas

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

Form/Schedule	Requirement(s) to Print
Form AR 1040, Schedule A	
Form AR 1040, Schedule K	
Form AR10000CRES	Arkansas forms are not suppressed in Organizer States Common State Print Suppression. + Form AR1000CRES is not suppressed in Organizer States Arkansas Return Options. + Partners must be marked as part of a composite return in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information tab.

Form AR1000CR	Arkansas forms are not suppressed in Organizer States Common State Print Suppression. + Form AR1000CRES is not suppressed in Organizer States Arkansas Return Options. + Partners must be marked as part of a composite return in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information tab.
Form AR1000CRV	Arkansas forms are not suppressed in Organizer States Common State Print Suppression. + Form AR1000CRES is not suppressed in Organizer States Arkansas Return Options. + Partners need to be marked as part of a composite return in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information tab.
Form AR1050	Arkansas forms are not suppressed in Organizer States Common State Print Suppression. + Page 2 is not suppressed in Organizer States Arkansas Return Options. * To condense large dollar amounts on Page 1, go to Organizer States Arkansas Return Options. * To force print a blank copy of Page 2, go to Organizer States Arkansas Return Options.
Form AR1055-CR	Select AR Composite in Organizer States Common State Estimates and Extensions Estimates and Extensions
Form AR1055-PE	Select AR in Organizer States Common State Estimates and Extensions Estimates and Extensions
FormAR1100PET	
FormAR1100PET: AdditionalInformation	
FormAR1100PET: MembersShareOfIncome, AccountingIncome, ApportionmentOfIncome	
FormAR1155PET	
SchAR1100BIC	
SchAR1100NOL	
SchAR1100Rec	
SchAR1100WH	
SchAR2220APET	
SchARK	
Schedule A	Arkansas forms are not suppressed in Organizer States Common State Print Suppression. + Page 2 is not suppressed in Organizer States Arkansas Return Options. * To condense large dollar amounts on Page 1, go to Organizer States Arkansas Return Options. * To force print a blank copy of Page 2, go to Organizer States Arkansas Return Options.

Schedule AR K-1	Arkansas forms or Schedule K-1 are not suppressed in Organizer States Common State Print Suppression. + The partner number must be entered in Organizer Partner Information Partner by Partner Data Partner Name Partner Information. + Schedule K-1 print is not suppressed in Organizer States Arkansas Return Options.
Schedule AR1099PT	Arkansas forms are not suppressed in Organizer States Common State Print Suppression. + Form AR1099PT is not suppressed in Organizer States Arkansas Return Options. + Print is not suppressed for partners in Organizer States Arkansas Composite Return Nonresident Information. + The nonresident member name must be present in Tax Forms States Arkansas AR1099PT. * If printing 2 partners per page, it cannot be suppressed in Organizer States Arkansas Return Options.
Schedule B	Arkansas forms are not suppressed in Organizer States Common State Print Suppression. + Page 2 is not suppressed in Organizer States Arkansas Return Options. * To condense large dollar amounts on Page 1, go to Organizer States Arkansas Return Options. * To force print a blank copy of Page 2, go to Organizer States Arkansas Return Options.

California

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

Form/Schedule	Requirement(s) to Print
Form 1067A (540NR)	Must check Composite Return to generate Form 540NR in Organizer States Common State General Information Basic Return Information Tab Filing Status Col E.
Form 1067B (540NR)	We need to check the option in Composite return- Organizer State CA Composite return Payment Transfer Request- BOX-A or BOX B
Form 3519	Form 3519, page 1, Amount of payment field has data OR Form 3519, page 2 have data on one of the following lines. 1, 2a, 3, 4.
Form 3521	If amount exists on Lines 2, 3, 11, or 12a of Form 3521. Organizer States California Credits \ Low-income Housing Credit BIN number
Form 3522 (568) - CY	Must have the California State activated in Organizer States State and City Activation +California LLC return must be activated in Organizer States California General Information \ Partnership or LLC Return Status and not suppressed in Organizer States California Return Options Print Options Print Suppression
Form 3522 (568) - PY	Must have the California State activated in Organizer States State and City Activation AND California LLC return must be activated in Organizer States California General Information \ Partnership or LLC Return Status and not suppressed in Organizer States California Return Options Print Options Print Suppression
Form 3523	Must generate CA 565 or CA 568 return and an amount (Not NONE) exists on Form 3523, Page 2, Line 46 or an amount (Not NONE) exists on Form 3523, Page 2, Line 47 or an amount (Not NONE) exists on Form 3523, Page 2, Line 49.

Form 3536 - CY	Must generate the CA 568 LLC return in Organizer States California General Information \ Partnership or LLC Return Status. Form 565 must also be activated in Organizer States State and City Activation and an amount exists for Amount of Payment Estimated Fee for LLCs (Form 3536 for Current Taxable Year)
Form 3536 - PY	Must generate the CA 568 LLC return in Organizer States California General Information \ Partnership or LLC Return Status. Form 565 must also be activated in Organizer States State and City Activation and an amount exists for Amount of Payment Estimated Fee for LLCs (Form 3536 for Next Taxable Year)
Form 3537 (568)	Form 568 must be on Extension (Organizer States California Extension Information), Form 3537 is not suppressed in Organizer States California, or if All states Extensions are forced print in Organizer States Common State Extension Options or no data exists on the checkbox for CA LLC On Extension box.
Form 3538	Form 568 must be on Extension (Organizer States California Extension Information), Form 3538 is not suppressed in Organizer States California, or if All states Extensions are forced print in Organizer States Common State Extension Options and an amount exists in Organizer States California Payments of Tax Tax Deposit Voucher - Partnership (Form 3579)/LLC (Form 3578) - amount of payment to be printed on tax deposit.
Form 3541	Line 12 Total available credit must have data.
Form 3554	Must generate CA 565 or CA 568 return and Form 3554 is not suppressed in Organizer States California Credits New Employment Credits and an amount exists on Form 3544, Lines 12 or 14.
Form 3579	Form 565 must be on Extension (Organizer States California Extension Information), Form 3538 is not suppressed in Organizer States California, or if All states Extensions are forced print in Organizer States Common State Extension Options and an amount exists in Organizer States California Payments of Tax Tax Deposit Voucher - Partnership (Form 3579)/LLC (Form 3578) - amount of payment to be printed on tax deposit.
Form 3804	Form is not suppressed from Organizer States California Return options Print options and Part I Line 1 or 3 must have data.
Form 3805E	Installment sale exists in the return for CA
Form 3805Z	+ Form 3805Z, Item B has name of Enterprise Zone (EZ) business + Form 3805Z is not suppressed on Organizer States California Return Options Print Options Print Suppression
Form 3832 (568)	Form 3832, top section has nonresident member record at the end of the tax year or Form 3832 bottom section has nonresident member information who sold or transferred ownership before the end of tax year
Form 3840	Data must be present from Federal and Form 3840 Line A and B must be selected.
Form 3864 (540NR)	Must check Composite Return to generate Form 540NR in Organizer States Common State General Information Basic Return Information Col E
Form 3885L (568)	LLC and CA depreciation, Section 179, and/or amortization exists
Form 3885P (565)	Not LLC and CA depreciation, Section 179, and/or amortization exists

Form 4684	Casualty gains/losses exist
Form 540-ES	If not suppressed in Organizer States California Estimated Tax Compute and Print Options and an amount exists for 1st Quarter, 2nd Quarter, 3rd Quarter, or 4th Quarter
Form 540NR	Must check Composite Return to generate Form 540NR in Organizer States Common State General Information Basic Return Information Tab Filing Status Col E.
Form 565	Must have the California State activated in Organizer States State and City Activation +NOT have the California LLC return activated in Organizer States California General Information \ Partnership or LLC Return Status
Form 568	Must have the California State activated in Organizer States State and City Activation +California LLC return must be activated in Organizer States California General Information \ Partnership or LLC Return Status
Form 588	Must select Check to print Form 588 Nonresident Withholding Waiver Request in Organizer States California Other State Forms Nonresident Waiver Request Print Options
Form 592	If an amount exists on Lines 3, 6, or 7 of any voucher and Form 592 is not suppressed
Form 592-A	If an amount exists on Installment 1, 2, 3, or 4 payment amount in Organizer States California Other State Forms Foreign partner Qtr WH Remit Stmt
Form 592-B	If an amount exists for Subject to withholding, Amount of tax, or Amount subject to backup withholding in Organizer States California Other State Forms Form 592 Folder (Withholding)
Form 592-F	One of these lines must have an amount (line 1 total tax withheld, line 5 prior payments, line 7 total payments). If wanting to print next year's form, then print option must be selected, else default is current year form will print.
Form 592-PTE	+ Part II Pass-through Information select 592-PTE in Organizer States California Other State Forms Form 592 Folder (Withholding) Information + Must have data on Form 592-PTE Side 1 Line 3 or 6.
Form 592-Q	+ Part II Pass-through Information select 592-PTE in Organizer States California Other State Forms Form 592 Folder (Withholding) Information + Not suppressed in Organizer States California Return Options Print Options tab Print Options + Amount of payment is required
Form 592-V	Amount of payment is required
Form 8453-LLC	+ Enable CA e-file from Organizer States State E-file Enable/Create Returns Column C Enable + Select Generate California LLC return (Form 568) from Organizer State California General Information
Form 8453-P	+ Enable CA e-file from Organizer States State E-file Enable/Create Returns Column C Enable + Select Generate California partnership return (Form 565) from Organizer States California General Information + Do not select Generate California LLC return (Form 568) from Organizer States California General Information

Form 8825	+ Not suppress Rental supporting statements from Organizer States California Return Options Print Options Print Suppression + OR select to print CA 8825 from Organizer States California Return Options Print Options Print Options
Schedule D (565)	CA Capital gains exist and not LLC
Schedule D (568)	CA Capital gains exist and LLC
Schedule D-1 (565)	CA sales of business property detail exists and not LLC
Schedule D-1 (568)	CA sales of business property detail exists and LLC
Schedule EO (565)	Part I (Schedule EO) has Name of Entity or Part II (Schedule EO) has Name of Entity from Organizer States California Other State Forms Schedule EO
Schedule EO (568)	Part I (Schedule EO) has Name of Entity or Part II (Schedule EO) has Name of Entity from Organizer States California Other State Forms Schedule EO
Schedule F	If there is an Activity number in Organizer Activity Information Farm Farm Activity Name and there is income on Tax Forms States California Sch F Activity Name Sch F, Page 1, Line 9 or Sch F, Page 2, Line 50
Schedule K (565)	Do not mark Print Form 565, sides 1, 2, and 3 or Form 568, sides 1,2,3, and 7 only from Organizer States California Return Options Print Options Print Options
Schedule K (568)	Do not mark Print Form 565, sides 1, 2, and 3 or Form 568, sides 1,2,3, and 7 only from Organizer States California Return Options Print Options Print Options
Schedule K-1 (565)	Not suppressed in Organizer States California Return Options Print Options Sch K, K-1, and Schedule of Activities Print suppression California K-1 and supporting statements
Schedule K-1 (565/568) Supporting Statements	Not suppressed in Organizer States California Return Options Print Options Sch K, K-1, and Schedule of Activities Print suppression Schedule K, Schedule K-1 and Schedule of Activities All detail related directly to: Schedule K-1 column
Schedule K-1 (568)	+ No Sole Owner Name on Form 568, Side 3 + Not suppressed in Organizer States California Return Options Print Options Sch K, K-1, and Schedule of Activities Print suppression California K-1 and supporting statements + Not suppressed in Organizer States Common State Print Suppression
Schedule R	+ Not suppress California Schedule R and support schedules Organizer States California Return Options Print Suppression + Schedule R, line 18a has data OR For 565 return, Form 565, side 3, Question W is Yes. For 568 return, Form 568, side 2, Question M(1) is Yes.

Colorado

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

Form/Schedule

Requirement(s) to Print

Form 106

Pages 1-3 print if the State of Colorado is activated + Page 4 detail prints on whitepaper and prints if a partner number and a partner name exists + Page 5 prints if the option to suppress Part IV is not selected + (Page 6 prints if line everywhere amount on line 10 exist + if the option to suppress Part IV is not selected on Organizer | Colorado | Return Options | Print Suppression)

Form 106 CR

Credit amounts must exist on this form for it to print

Form 106-EP	(CO Composite Return Organizer - (print if entry on Colorado estimate equal specific total amount OR if an entry is made on the 1st, 2nd, 3rd, or 4th quarter fields OR the Tax Form has data for the amount of payment for any quarter) + NOT suppress print of 106-EP on Organizer States Colorado Composite Return Under Estimated payments using DR 106-EP + NOT suppressed on Organizer States Common State Print Suppression + Respective voucher has data for amount of payment
Form CO 0289	Employee name and credit amount must exist in order to print
Form CO 106 KD	Common state and organizer is not suppressed + Partner name does exist.
Form CO 106 PartV	Organizer is not suppressed.
Form CO 106K	No entry on the suppression of Schedule K-1 equivalents field on Organizer States Colorado Return Options + No entry on the suppression of Schedule K-1/K-1 equivalent Colorado field on Organizer States Common State Print Suppression
Form CO 1330	PTE credit name must exist.
Form DR 1366	Tax Form Form 106 Page 2, line 14 has to have a value greater than zero OR force print Form DR 1366 field on Organizer Colorado Return Options has an entry
Form DR 1778	Colorado e-file enabled + Mail with DR 1778 is selected on Organizer States Colorado E-file Additional Information
Form DR-0078A	"No line 87 in Tax Form DR 1366 Page 10, Form generating by entering applicable credits in Organizer/States/Colorado/Credits/General Credits "
Form DR-0107	Nonresident partner + Not including in composite + Elects to file Form 107 on Organizer Partner Information Partner Information State Partner Information tab select partner is electing to file Form 107 + Nonresident could not selected to be including in composite filing and file Form 107DR at the same time.
Form DR-0108	No entry on the suppression of Form 108 for all nonresident partners field on Organizer States Colorado Return Options + Nonresident partner + Not including in composite + NOT checked Partner is not electing to file Form 108 on Organizer Partner Information Partner Information State Partner Information tab + Nonresident could not selected to be including in composite filing and file Form 108 at the same time.
Form DR-158-N	(Return On Extension is selected on Organizer States Common State Basic Return Information Return Information + Extension is NOT suppressed on Organizer States Common State Print Suppression + NOT suppressed on Organizer States Colorado Extension Information + NOT suppressed on Organizer States Common State Extension Options + Option to force print all state extensions even without tentative tax amounts is selected on Organizer States Common State Extension Options) OR (Return On Extension is selected on Organizer States Common State Basic Return Information Return Information + Extension is NOT suppressed on Organizer States Common State Print Suppression + NOT suppressed on Organizer States Colorado Extension Information + NOT suppressed on Organizer States Common State Extension Options AND data is on the Due with extension field on Organizer States Colorado Extension Information)

Form DR-8453P	Colorado e-file enabled on Organizer States State E-file Enable/Create Returns + Signature option is selected on Organizer States Colorado E-file Additional Information
Form DR-900P	Generate Form 0900P is selected on Organizer States Colorado E-file Additional Information + Amount of payment is on the tax form; No Select Print and Tax Form view available

Connecticut

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

Form/Schedule	Requirement(s) to Print
Form CT K-1T	Not suppressed in Federal Organizer - Organizer General Information Return and Print Options Sch K, K-1 and Activity Schedules + Not suppressed in Connecticut Organizer
Form CT-1065/CT-1120SI	State is active
Form CT-1065/CT-1120SI EXT	Not suppressed + Marked as On Extension - Organizer States Common State General Information Basic Return Information Return Information tab column O, Return is on Extension
Form CT-1065/CT-1120SI Part III	
Form CT-1065/CT-1120SI Part IX	
Form CT-1065/CT-1120SI Part V	
Form CT-1065/CT-1120SI Part VI	
Form CT-1065/CT-1120SI Part VII	
Form OP-424	Not suppressed + Entity is either Limited Partnership, Limited Liability Partnership or Partnership (LLC) + Connecticut Tax Registration number is populated at Organizer States Connecticut Business Entity Tax
FormCT10651120SIES	
SchCT10651120SICE	
Schedule CT K-1	Not suppressed in Federal Organizer - Organizer General Information Return and Print Options Sch K, K-1 and Activity Schedules + Not suppressed in CT Organizer + Partner has a partner number assigned - Organizer Partner Information Partner by Partner Data Partner Name Partner Number
Schedule CT-1065/1120SINR	
Schedule CT-AB Section 3	

Delaware

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

Form/Schedule	Requirement(s) to Print
Form CMP-EST	Delaware is an active state in the Organizer States State & City Activation and Data is present in either line 1 and/or line 2 within the Tax Forms States Delaware Composite Form CMP-EST CMP-EST Q1/2/3/4
Form CMP-EXT	Delaware is an active state in the Organizer States State & City Activation and Data must be present in the Tax Forms States Delaware Composite Form CMP-EXT, line 1
Form CMP-SCH	Delaware is an active state in the Organizer States State & City Activation and At least one partner is marked for Delaware Composite within the Organizer Partner Information Partner by partner data [Partner Name] "State Partner Information" tab "Delaware" checkbox is marked in the "State Composite Returns" section
Form CMP-TAX (formerly 200-C)	Delaware forms are not suppressed in Organizer States Common State Print Suppression. + Must be an amount on line 1 of Form CMP-TAX in Tax Forms States Delaware Composite Form CMP-TAX + Partners must be marked as Delaware composite partners in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information.
Form PRT-EXT	Locator must be "On Extension", either in Organizer Extension Information dropdown must not be set to "Return is NOT on extension" and/or The following option is selected: Organizer States Common State Basic Return Information "Return Information" tab, "Return on Extension" column, "Delaware" row
Form PRT-PSI	Delaware forms or Schedule K-1 are not suppressed in Organizer States Common State Print Suppression. + Schedule K-1 print is not suppressed in Organizer States Delaware Return Options. + Partner number must be entered in Organizer Partner Information Partner by Partner Data Partner Name Partner Information. + To print the Partner Basis Schedule, go to Organizer States Delaware Return Options.
FormPRT-RTN	Delaware forms are not suppressed in Organizer States Common State Print Suppression. * To condense print for large dollar amounts, go to Organizer States Delaware Return Options.
Schedule PRT-RTN Apportionment	
Schedule PRT-RTN Income Deductions	

District of Columbia

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

Form/Schedule	Requirement(s) to Print
Form D-65	Site activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression +Extension print only not checked

Form FR-165	Not suppressed in Common State or in State Organizer +Box is checked to generate form.
Schedule K-1 Equivalent	Suppression of K-1 not checked in state common +Partner name line present
District of Columbia UBT (Jurisdiction must be activated and released for forms/schedules to pri	
Form/Schedule	Requirement(s) to Print
Form D-2220	Organizer/Cities and Intangibles/DC UBT/Penalties and Interest D220 compute must be check and amount must be available.
Form D-30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Form D-30ES	+Not Suppressed +Not Alpha Only +Amount of estimate excess of \$100 or set to force print +Not Suppressed if Greater than Overpayment
Form D-30P	When amount to submit to state entered in Organizer
Form FR-130	Not suppressed in Common State or in state Organizer +Box checked to generate form Tentative tax or +Force print even when tentative tax blank.
Form Supplemental30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule A30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule B30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule C30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule E30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule F30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule G30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule H30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule I30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule J30	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule K	State activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Schedule K-1 Equivalent (K-1)	Suppression of K-1 not checked in Common State +Partner name line present
Schedule SR	Small Retail credit must exist.

Schedule UB Business Credits Total refundable credits shown on form

Florida

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

Form/Schedule	Requirement(s) to Print
Form F-1065	Not suppressed in Organizer States Common State Print Suppression + State is active
Form F-7004	State is active + Return is on Extension
Schedule K-1 Equivalent	Organizer Florida Return Options Print Suppression Schedule K-1 Equivalents unchecked + Organizer States Common State General Information Basic Return Information Basic Return Information Return Options Schedule K-1 unchecked

Florida LLC

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

Form/Schedule	Requirement(s) to Print
Form F-1120	Not suppressed in Organizer States Common State Print Suppression + State is active
Form F-1120ES	Not suppressed in Organizer States Common State Print Suppression + State is active + Not suppressed in Organizer Cities and Intangible Estimate Options + Has amounts in Tax Forms Cities and Intangible F-1120ES, Page 1-4 Estimated Tax Payment \$
Form F-2220	State is active + Option other than option 4 is selected in Organizer Cities and Intangibles Florida LLC Estimate Options Estimated Tax Estimate Option
Form F-7004	State is active + Return is on Extension + Not suppressed in Organizer States Common State Print Suppression

Georgia

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

Form/Schedule	Requirement(s) to Print
Form 4562 (federal/state versions)	Depreciation, Amortization, or Section 179 detail has been entered in the return and the forms are not suppressed
Form 700	Georgia forms are not suppressed in Organizer States Common State Print Suppression. +Schedules 2-5 are not suppressed in Organizer States Georgia Return Options.
Form CR-ES	Georgia forms are not suppressed in Organizer States Common State Print Suppression. +Must be an amount paid in Tax Forms States Georgia CR-ES. +Must have partners marked as composite in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information tab.
Form G-1003	Georgia forms are not suppressed in Organizer States Common State Print Suppression. +Form G-1003 needs to be activated in Organizer States Georgia Income Statement Return.

Form G-2-A	Georgia forms are not suppressed in Organizer States Common State Print Suppression. +Form G2-A must be generated in Organizer States Georgia Nonresident Withholding. +Must have nonresident partners in the return.
Form G7-NRW	Georgia forms are not suppressed in Organizer States Common State Print Suppression. +Form G7-NRW must be activated in Organizer States Georgia Nonresident Withholding
Form GA-V	Georgia forms are not suppressed in Organizer States Common State Print Suppression. +Form GA-V must be activated in Organizer States Georgia Nonresident Withholding
Form IT-303	Georgia forms and Extension are not suppressed in Organizer States Common State Print Suppression. +Return is marked on extension in Organizer Extension Information. +Extension is not suppressed in Organizer States Georgia Extension Information.
Form IT-ADDBACK	Related member must exist.
Form IT-CA	Organizer is not suppressed and credit amounts must exist.
Form IT-CR	Georgia forms are not suppressed in Organizer States Common State Print Suppression. + (Must have partners marked as composite in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information tab. OR the following option is selected: Organizer States Georgia Return Options FORCE PRINT section Form IT-CR)
Form IT-FC	Organizer is not suppressed and credit/QIEP amounts must exist.
Form IT-QJ	Organizer is not suppressed and credit amounts must exist.
Form IT-RC	Organizer is not suppressed and credit amounts must exist.
Form IT-RD	Organizer is not suppressed and credit amounts must exist.
Form IT-RTM	Organizer is not suppressed and credit amounts must exist.
Schedule K-1 Equivalent	Georgia forms and Schedule K-1 Equivalent are not suppressed in Organizer States Common State Print Suppression. + Schedule K-1 Equivalent print is not suppressed in Organizer States Georgia Return Options. + Partner name and number must be entered in Organizer Partner Information Partner by Partner Data Partner Name Partner Information. *Partner's percentage of profit can be suppressed in Organizer States Georgia Return Options.

Hawaii

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

Form/Schedule	Requirement(s) to Print
Form N-15	Tax Forms N-15 Page 2, line 20 has a value and form is not suppressed in Organizer States Hawaii Composite Return
Form N-20	Prints on activation of state unless marked on extension
Form N-20, Schedule K-1	Prints as long as there is a partner number, unless on extension or Sch K-1 are suppressed in Organizer States Hawaii Return Options
Form N-312	Tax Form N-312 Page 1 line 3 or page 2 line 13 has a value

Form N-312A	Tax Form N-312A page 2 line 13 has a value for total increase tax
Form N-756	Tax Form N-756 Page 1 line 1, 2a or line 4 has a value
Form N-756A	Tax Form N-756A Page 1 line 2e or line 3e has a value
Schedule D	Capital gains assets exist
Schedule D-1	A Sales of Business amount exists
Schedule K-1	Prints as long as there is a partner number, unless on extension or Sch K-1 are suppressed in Organizer States Hawaii Return Options
Schedule O and P Worksheet	Prints with Form N-20

Idaho

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

Form/Schedule	Requirement(s) to Print
Form 41ES	Not suppressed in Organizer States Common State Print Suppression Extension + State is active
Form 42	Tax Forms States Idaho Sch 42 line 21 must have a value
Form 44	Tax Forms States Idaho Form 44 Part I Line 10 Credit Allowed must exist OR Tax Forms States Form 44 Part II Line 6 must exist
Form 49	Tax Forms States Idaho Form 49 Part I Line 11 must exist OR Tax Forms States Idaho Form 49 Part II Line 9 must exist
Form 49R	Tax Forms States Idaho Form 49R Part III Line 15 must exist
Form 65	
Form 67	Tax Forms States Idaho Form 67 Line 27 must exist
Form 68	Tax Forms States Idaho Form 68 Line 11 must exist
Form 69	
Form 75	Tax Forms States Idaho Form 75 Both versions Section IV Line 6 or 7 must exist
Form PTE-01	Organizer Partner information Partner by Partner data Partner information state partner information Idaho PTE -12 Filing code W- Enity Paid Withholding.
Form PTE-12	Tax Forms Idaho Form PTE-12 must have at least one partner and filing code
ITCEquipmentList	
Schedule K-1	Not suppressed in Organizer States Common State Print Suppression + State is active + Not Suppressed in Organizer Idaho Return Options Print Suppression Schedule K-1 Equivalent

Illinois

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

Form/Schedule	Requirement(s) to Print
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Form IL-1000-E	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + Organizer Partner Information Partner by Partner Data Select partner Partner Information State Partner Information TAB Scroll down to "Illinois" and checkbox "Print Form IL-1000-E for this partner. Form IL-1000-E will NOT print for partner with entity type as "Individual".
Form IL-1065	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox
Form IL-1065V	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + Organizer States Illinois Return Options Form IL-1065-V is not suppressed under print suppression + Tax Form States Illinois Form IL-1065-V Must have a payment amount greater than NONE.
Form IL-1065X	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + Organizer States Illinois Amended Return Checkbox "Print Form IL-1065-X for revised Form IL-1065" must be checked + Organizer States Illinois Return Options Do not checkbox "Print Investment Partnership with no numeric data on Form IL-1065, Step 6.
Form IL-4562	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + Tax Form States Illinois Form IL-4562 Step 2 line 4 must have a value. OR Step 3 line 10 must have a value.
Form IL-477	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + Tax Form States Illinois Form IL-477 Either Step 1 line 2 column G must have a value. OR Step 1 line 13 must have a value. OR Step 2 checkbox "If business is new to Illinois" is checked OR Step 2 line 16 column A must have a value.
Form IL-505-B	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" AND "Extensions" column, "Illinois" checkbox + Organizer States Common State Extension Options Illinois "On Extension" must be checked and "Suppress Extension" must be blank + Either checkbox to "Force print all state extensions even without tentative tax amounts" OR Tax Forms States Illinois Form IL-505-B Payment amount must have a value.
Form IL-516-B	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + Tax Forms States Illinois Form IL-516-B Either voucher 1 OR voucher 2 OR voucher 3 OR voucher 4 must have a "Payment Amount" value.
Form IL-516-I	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + Tax Forms States Illinois Form IL-516-I Either voucher 1 OR voucher 2 OR voucher 3 OR voucher 4 must have a "Payment Amount" value.
Form IL2220	
Form ILAuthorization	

Schedule 1299-A	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox +Organizer States Illinois Return Options Schedule 1299-A is not suppressed under "Print Suppression" +Tax Forms States Illinois Form IL-1065, Page 1 Step 1 line Q checkbox must be checked.
Schedule 4255	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox +Organizer States Illinois ITC Recapture Add new ITC Recapture date placed in service +Tax Forms States Illinois Sch 4255-Recapture of ITC Select "Year" Sch 4255, Page 2 Step 4 Line 17 either column A OR column C must have a value.
Schedule 80/20	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox +Organizer States Illinois Related Party Expenses Add new Name of 80/20 Company +Tax Forms States Illinois Sch 80/20 Select Name of Company Either Step 2 line 13 OR Step 4 line 32 must have a value.
Schedule B	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + At least 1 partner name must be entered in Organizer Partner Information Partner by Partner Data.
Schedule B, Section B	
Schedule F	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox +Organizer States Illinois Adjustments, Gains Add new Adjustments, Gains +Tax Forms States Illinois Sch F Line 14 must have a value.
Schedule K-1-P	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox + At least 1 partner name must be entered in Organizer Partner Information Partner by Partner Data + Schedule K-1 and partner activity schedules is not suppressed on Organizer General Information Return and Print Options Sch K, K-1 and Activity Schedules TAB + Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "Illinois" checkbox + Schedule K-1-P checkbox is not suppressed on Organizer States Illinois Return Options Print Suppression.
Schedule K-1-p (3)	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox +At least 1 partner name must be entered in Organizer Partner Information Partner by Partner Data +Schedule K-1 and partner activity schedules are not suppressed on Organizer General Information Return and Print Options Sch K, K-1 and Activity Schedules TAB +Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "Illinois" checkbox +Schedule K-1-P checkbox is not suppressed on Organizer States Illinois Return Options Print Suppression +Return "Tax Year" must be a calendar year +Partner must be a nonresident partner +In Organizer Partner Information Partner by Partner Data Select partner Partner Information State Partner Information "Illinois", do not checkbox to "Print Form IL-1000-E for this partner +Do not select "Provided Form IL-1000-E" OR "Exempt Organization".

Schedule M	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox +Schedule M is not suppressed on Organizer States Illinois Return Options Print Suppression +Tax Forms States Illinois Sch M Either Step 2 Line 10 OR Step 3 Line 34 must have a value.
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Schedule NB	Illinois is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Illinois" checkbox +Tax Forms States Illinois Form IL-1065 Step 1 Line F checkbox "classified as an investment partnership +Step 5 Line 35A both must not be checked.
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SchIL120NLD

SchILK1T

Indiana

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

Form/Schedule	Requirement(s) to Print
Form IT-65, pp. 1-3	Form IT-65 has page 1 and page 2. Page 3 doesnt exists.
Form IT-65, Schedule E Apportionment	Schedule E prints upon activation of state as part of Form IT-65
Form IT-6WTH	Tax Forms IT-6WTH Total Tax has an amount
Schedule Composite	
Schedule Composite-COR	
Schedule E-7	Tax Forms Schedule E7 page 1 line 9 has a value
Schedule IN Comp A	
Schedule IN EZ Enterprise Zone	
Schedule IN IT 20 REC	
Schedule IN IT 65 Recap	
Schedule IN K-1	
Schedule IN-EDGE	Tax Forms IN EDGE Total Edge Credit has value
Schedule IN-EDGE-R	Tax Forms IN EDGE-R Total Edge -R Credit has value
Schedule IN-OCC	Tax Forms IN OCC Total OCC Credit has value
Schedule IT-65 COMP	Form not available in Locator.

Iowa

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

Form/Schedule	Requirement(s) to Print
Form 4562B	

Form 8453-PE	On Organizer States Iowa E-file Additional Information, make a selection under Signature Options +Check the box for "I have read and agree with the certification per details on Form IA 8453-PE".
Form IA 102	
Form IA 102 & 103	
Form IA 103	
Form IA 1040 ES	Value must exists for Amount Due- Tax Forms States Iowa IA 1040ES +Organizer States Iowa Composite Return "Estimated Tax Options" check (Print blank estimates)".
Form IA 1040C	Value must exists on Tax Forms States Iowa IA 1040C Step 2.
Form IA 1065	Not suppressed in Common State - Organizer States Common State Print Suppression uncheck State Forms, for Iowa.
Form IA 128 & 128S	Value must exists on Tax Forms States Iowa IA 128 Part I Line 15.
Form IA 133, 135 & 138	Value must exists on Tax Forms States Iowa IA 133 Lines 8, 9, or 10.
Form IA 178	
Form IA 2220	
Form IA 4136	Value must exists on Tax Forms States Iowa IA 4136 Page 2 Line 7.
Form IA4562A, Part III & IA4562B	Depreciation detail with special depreciation exists
FormIA163	
IA - PTEC	
Sch DE	
SchCC	
SchD	
Schedule K-1	Not suppressed in Organizer States Iowa Return Options "Print Suppression".

Kansas

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

Form/Schedule	Requirement(s) to Print
Form K-120EX	Form line 5 must have amount
Form K-120S	State must be active
Form K-120S AS	State must be active
Form K-40	If there is individual composite member
Form K-40C	If there is individual composite member
Form K-40ES	Enter amounts in Organizer/States/Kansas/Composite Return/K-40V and K-40ES
Form K-40V	If there is individual composite member

Form LC	Form is generated under Organizer States Kansas LC/LP Information LC/LP Return Status
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Form LP	Form is generated under Organizer States Kansas LC/LP Information LC/LP Return Status
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Schedule K-1 Equivalent	Print is not suppressed under Organizer States Kansas Return Options print suppression +Not suppressed under Common State Print Suppression
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Kentucky

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

Form/Schedule

Requirement(s) to Print

Form 40A102

Form 4562K

Form 720-ES	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms + "Estimated Tax" column, "Kentucky" checkbox +Form 720-ES is not suppressed on Organizer States Kentucky Return Options +Organizer General Information Basic Return Information Entity Information Partnership type drop-down menu Must NOT be selected as "Domestic general partnership +Organizer States Kentucky Overpayment and Estimate Option Estimated Tax TAB Estimate Option drop-down menu Must NOT be selected as "Suppress compute and print +Tax Forms States Kentucky 765 720-ES Tax Voucher 1 Drill down from "Total" field "Amount due" field on each (6th Month, 9th Month, 12th Month) column must have a value.
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Form 720EXT	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms + "Extensions" column, "Kentucky" checkbox +Organizer General Information Basic Return Information Entity Information Partnership type drop-down menu Must NOT be selected as "Domestic general partnership" +Organizer States Common State Extension Options Checkbox "On Extension" must be checked and "Suppress Extension" must be blank for "Kentucky".
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Form 720SL

Form 720-V	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Kentucky E-file must be activated in Organizer States State E-file Enable/Create Returns Kentucky "Column C" +Tax Forms States Kentucky Form 720-V Line 5 "Total" must have a value.
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Form 740EXT	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms +Extensions" column, "Kentucky" checkbox +Organizer General Information Basic Return Information Return Information Partnership type drop-down menu Select "Domestic general partnership" +Organizer States Common State Extension Options Checkbox "On Extension" must be checked and "Suppress Extension" must be blank for "Kentucky".
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Form 740NP-WH	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + Form 740NP-WH is not suppressed on Organizer States Kentucky Return Options + Tax Forms States Kentucky Nonresident Withholding 740NP-WH Line 9 must have a value.
Form 740NP-WH-ES	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + Form 740NP-WH-ES is not suppressed on Organizer States Kentucky Return Options + Organizer General Information Basic Return Information Entity Information Partnership type drop-down menu Must NOT be selected as "Domestic general partnership" + Organizer States Kentucky Overpayment and Estimate Option Estimated Tax TAB Estimate Option drop-down menu Must NOT be selected as "Suppress compute and print" + Tax Form States Kentucky Nonresident Withholding 740NP-WH-ES Each "Voucher" must have "Total Tax Paid" amount in order for the voucher to print.
Form 740PTET	
Form 8879(c)-K	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + Kentucky E-file must be activated in Organizer States State E-file Enable/Create Returns Kentucky "Column C".
Form PTE	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + Organizer General Information Basic Return Information Entity Information Partnership type drop-down menu Must NOT be selected as "Domestic general partnership".
Form PTETCR	
Form PTETCR	
Form PTETELECT	
Form PTE-WH	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + Form PTE-WH is not suppressed on Organizer States Kentucky Return Options + Tax Forms States Kentucky Nonresident Withholding 740NP-WH Line 9 must have a value. + Partner must be nonresident partner + Partner must not be selected as "Nonresident partner is exempt from KY withholding" in Organizer Partner Information State Partner Information Kentucky.
Schedule A	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + Tax Forms States Kentucky Sch A Section I Line 12 must have a value.
Schedule BIO	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + Schedule BIO is not suppressed on Organizer States Kentucky Return Options + Tax Forms States Kentucky Schedule BIO Part I Line 4 must have a value.

Schedule COGS	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Schedule COGS is not suppressed on Organizer States Kentucky Return Options +Tax Forms States Kentucky Form 765 Item B "Gross Profits" must be checked OR Organizer States Kentucky Kentucky Cost of Goods Sold "Force print Schedule COGS" must be checked
Schedule DE	
Schedule INV	
Schedule K-1 (GP)	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Form 765-GP must be activated in Tax Forms States Kentucky +Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "Kentucky" checkbox +Schedule K-1 is not suppressed on Organizer States Kentucky Return Options
Schedule KIDASP	
Schedule KIDAT	
Schedule KIRASP	
Schedule KIRAT	
Schedule KJDASP	
Schedule KJDAT	
Schedule KJRASP	
Schedule KJRAT	
Schedule KRASP	
Schedule KRAT	
Schedule KREDASP	
Schedule KREDAT	
Schedule L-C	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Form 765-GP must NOT be activated in Tax Forms States Kentucky +Tax Forms States Kentucky Sch LLET Section D Line 1 must have a value. +Organizer States Kentucky 765 Ptrshp and LLET Return 765, Page 3 Select YES for question "For the taxable period being reported, was the partnership a partner in a pass-through entity..... OR Organizer States Kentucky LLET and Pass-Through Information Select checkbox "Corporation filing this tax return a partner or member of a limited liability PTE.....

Schedule of Activities	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "Kentucky" checkbox +Schedule K-1 is not suppressed on Organizer States Kentucky Return Options. +Partner activity schedules is not suppressed on Organizer General Information Return and Print Options Sch K, K-1 and Activity Schedules tab Print or Suppress option.
Schedule O-PTE	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Schedule O-PTE is not suppressed on Organizer States Kentucky Return Options +Tax Forms States Kentucky Sch O-PTE Part I Line 7 must have a value OR Tax Forms States Kentucky Sch O-PTE Part II Line 11 must have a value
Schedule PTE K	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Schedule K is not suppressed on Organizer States Kentucky Return Options.
Schedule PTE K-1	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Form 765 must be activated in Tax Forms States Kentucky +Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "Kentucky" checkbox +Schedule K-1 is not suppressed on Organizer States Kentucky Return Options
Schedule RPC	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Schedule RPC is not suppressed on Organizer States Kentucky Return Options +Organizer States Kentucky Related Party Expense Select "Force Print Schedule RPC OR Tax Forms States Kentucky Sch RPC, Page 1 Part II Section B Line 1 must have a value OR Tax Forms States Kentucky 765, Page 3 Select checkbox "YES" for question 7 OR Tax Forms States Kentucky 765, Page 1 Part I Line 4 must have a value
Schedule TCS	Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox +Form 765-GP must NOT be activated in Tax Forms States Kentucky +Tax Forms States Kentucky Sch TCS Part III Line 1 must have a value

Kentucky Cities: Frankfort

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

Form/Schedule	Requirement(s) to Print
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Net Profit License Fee Return	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Frankfort.
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Kentucky Cities: Kenton County and Cities

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

Form/Schedule	Requirement(s) to Print
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Annual Occupational Fee & Business License Renewal Return	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Kenton County.
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Schedule G	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Kenton County. + Activate County in Organizer States Kentucky Cities.
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Schedule N	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Kenton County. + Activate County in Organizer States Kentucky Cities.
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Kentucky Cities: Lexington-Fayette County

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

Form/Schedule	Requirement(s) to Print
Form 228	City activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer Common State Print Suppression
Form 228 ENP	State suppression is not checked +Final year check box not populated in Organizer Cities and Intangible Lexington-Fayette +Total installments due is greater than \$500, or +Box checked in organizer to compute estimate if amount due is less than threshold, or +Box checked to Print Alpha Only
Form 228S	City activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression

Kentucky Cities: Louisville

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

Form/Schedule	Requirement(s) to Print
Fayette County Worksheet 1 (for 228F and 228S)	Site activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Form OL-3	City activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Form OL-3E	Not suppressed in Common State or in State Organizer +Box checked return is on extension

Kentucky Cities: McCracken County

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

Form/Schedule	Requirement(s) to Print
Net Profit License Fee Return	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for McCracken County.

Kentucky Cities: Prestonsburg

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

Form/Schedule	Requirement(s) to Print
Net Profits Fee Return	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Prestonsburg.

Kentucky Cities: Pulaski County

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

Form/Schedule	Requirement(s) to Print
Form NP-100	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Pulaski.
Form PCOT2011NP-ES	Not suppressed in Organizer States Common State Print Suppression uncheck Estimates, for Pulaski +Not suppressed in Organizer Cities Pulaski County, KY Return Options "Print Suppression".

Kentucky Cities: Warren County

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

Form/Schedule	Requirement(s) to Print
Warren County Schools Net Profit Tax Return	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Warren County.

Kentucky Cities: Whitley County

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

Form/Schedule	Requirement(s) to Print
Whitley County Net Profit License Fee Return	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Whitley County.

Louisiana

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

Form/Schedule	Requirement(s) to Print
565 Schedule A, B, and C	
565 Schedule D	
565 Schedule E, F, G, H,I and J	
Cojcomposite Included Partners	
Cojcomposite Not Included Partners	
Form 4797	Federal 4797 prints
Form 4864	Federal 4684 prints
Form 6467-S	
Form IT-565-2D	Printing upon activation of state.
Form IT-565B	
Form R-6466	
Form R-6922	Not suppressed and line 1 total distributive income has an amount
Schedule K-1 Equivalent	Not suppressed and has partners

SchNRCPI & SchNRCPI3

SchRCP2 & SchRCP4

Maine

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

Form/Schedule	Requirement(s) to Print
Form 1040ME	Main Composite Return COMPOSITE RETURN STATUS Generate composite return.
Form 1099ME	Print is not suppressed under Organizer States Maine Return Options Print Suppression
Form 941P-ME	State is active
Schedule 1040C-ME	Composite return is generated
Schedule 2P	State is active, Form 941P-ME, page 2 Schedule 2P.
Schedule 3P	State is active, Form 941P-ME, page 3 Schedule 3P
Schedule K-1 Equivalent	Print is not suppressed under Organizer States Maine Return Options Print Suppression +Not suppressed under Organizer States Common State Print Suppression

Maryland

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

Form/Schedule	Requirement(s) to Print
Form 500DM	Line 6 Net decoupling modification has an amount and Form is not suppressed in Organizer States Maryland Return Options
Form 510	Form 510 prints as state is active
Form 510C	Have at least one composite member activated in Organizer Partner Information State Partner Information OR the following option is selected: Organizer States Maryland Return Options FORCE PRINT section 510C - Composite Return when there are no members
Form 510D	MD 510 is not suppressed in Organizer States Maryland Return Options +MD 510 marked as a final return will prevent print +Must be a value for Amount of tax enclosed.
Form 510E	Extension is not check in Organizer States Maryland Extension Information +Extension is checked in Organizer States Common State General Information Basic Return Information Return Information column P
Form EL101B	E-file or E-file extension must be enabled. +EL 101B is not suppressed in Organizer States Maryland Return Options
Form EL102B	E-File must be enabled. +EL102B must be activated in Organizer States Maryland Other State Tax Forms EL 102B. +Amount Paid must have a value. +EL 102B is not suppressed in Organizer States Maryland Return Options

Form500CR

Form500DM

Form500UP

Schedule B Corporations

Schedule B Fiduciary

Schedule B Individuals

Schedule B PTEs
Corporations

Schedule K-1 Schedule K-1 is not suppressed in Organizer | States | Maryland | Return Options or Common State | Print Suppression or General Information | Return and Print Options | Sch K, K-1 and Activity Schedules

Massachusetts

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

Form/Schedule

Requirement(s) to Print

Form 3 State is active

Form 3, Schedule 3K-1 Not suppressed in Organizer | States | Common State | Print Suppression +State is active

Form 63D-ELT

Form CRFR Tax Forms | States | Massachusetts | Composite Return | MA NRCR | Line 14 must exist

Form M-2210

Form M-4868 Not suppressed in Organizer | States | Common State | Print Suppression | Extension +State is active + Organizer | States | State E-file | Enable/Create Returns | MA Composite must be enabled +Tax Forms | States | Massachusetts | Composite Return | MA NRCR | Line 14 must exist

Form M-63D-EXT

Form M-63D-EXT

Form M-8453CR Organizer | States | State E-file | Enable/Create Returns | MA Composite must be enabled

Form M-8453P Organizer | States | State E-file | Enable/Create Returns | MA must be enabled

Form M-8736 Form not available in locator (it is Fidiciary Extension)

Form MA NRCR Tax Forms | States | Massachusetts | Composite Return | MA NRCR | Line 14 must exist

Form MA NRCR, Schedule 3K-1

Form PTE-EX Organizer | States | Massachusetts | General Information | check box "All partners to file Form PTE-EX OR Organizer | Partner Information | (Partner Name) | Partner Information | State Partner Information | Massachusetts | check box "File Form PTE-EX...

Sch3CMS

Schedule 1B	Tax Forms States Massachusetts Composite Return MA NRCR Line 14 must exist
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Schedule 1D	Tax Forms States Massachusetts Composite Return MA NRCR Line 14 must exist
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Schedule 1E	Tax Forms States Massachusetts Composite Return MA NRCR Line 14 must exist
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Schedule DRE	
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Schedule EOAC	
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Schedule FAF	
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Schedule FCI	
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Schedule TDS	
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Schedule X	
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Michigan

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

Form/Schedule

Requirement(s) to Print

Form 3581	Tax Forms States Michigan 3581 Must have Property name and Project Number +Tax Forms States Michigan 3581 - Line 3 must have amount or NONE
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Form 4	Return is on extension +Extension is not suppressed on Organizer States Michigan Return Options +Force print when tentative tax is blank on Organizer States Common State Extension Options +Michigan is active in the return +Michigan has been released +Extension is not suppressed on Organizer States Common State Print Suppression OR Return is on extension +Extension is not suppressed on Organizer States Michigan Return Options +Tax Forms States Michigan Form 4 - Line 9 must have amount or NONE +Michigan is active in the return +Michigan has been released +Extension is not suppressed on Organizer States Common State Print Suppression
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Form 4119 (Composite)	Not suppressed in Organizer States Michigan Composite Return Return Options
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Form 4567	State Forms is NOT suppressed on Organizer States Common State Print Suppression
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Form 4568	Tax Forms States Michigan Form 4568 - Line 40 must have amount greater than 0
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Form 4569	Tax Forms States Michigan Form 4569 - Line 13 must have amount or NONE
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Form 4570	Tax Forms States Michigan Form 4570 - Lines 26 or 27 must have amount
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Form 4571	Tax Forms States Michigan Form 4571 - Lines 10, 13, 19, 21, or 27 must have amount
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Form 4572	Tax Forms States Michigan Form 4572 - Lines 5, 9, 14, or 19 must have amount
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Form 4573	Tax Forms States Michigan Form 4573 - Lines 3, 7, 12, 14, 16, 17a, 19, 24, 27, 31, 35, 39, 41, 51, 56, 61, 66, 75, 77, or 79 must have amount
Form 4574	Tax Forms States Michigan Form 4574 - Line 23 must have amount greater than 0
Form 4575	Tax Forms States Michigan Form 4575 - Line 10 must have data
Form 4576	Tax Forms States Michigan Form 4576 - must have amount greater than 0 +State Forms is not suppressed on Organizer States Common State Print Suppression
Form 4577	
Form 4578	Tax Forms States Michigan Form 4578 - Lines 2 or 3 must have amount
Form 4579	Tax Forms States Michigan Form 4579 - Line 5 must have amount greater than 0
Form 4580	Print Form 4580 must be checked on Organizer States Michigan Combined Schedule Unitary Business Group Information +Tax Forms States Michigan Form 4580 - Part 1A, 3, or 4 must have member name
Form 4582	Suppress penalty computation and do not print form not selected on Organizer States Michigan Underpayment Options +Tax Forms States Michigan Form 4582 Page 2 Line 38 must have amount
Form 4583	
Form 4584	Tax Forms States Michigan Form 4584 - Lines 2, 36, 37, 54, 55, 63, 63, 72, or 79 must have amount
Form 4585	Tax Forms States Michigan Form 4585 Page 2 Line 7 must have amount greater than 0
Form 4586	
Form 4587	Tax Forms States Michigan Form 4587 Line 13 must have amount
Form 4595	Eligible for Renaissance Zone Credit must be checked on Organizer States Michigan Credits Renaissance Zone Credit +Tax Forms States Michigan 4595 Line 2 must have street address
Form 4700	State Forms is NOT suppressed on Organizer States Common State Print Suppression +Tax Forms States Michigan Form 4700 Line 19 must have data
Form 4746	Tax Forms States Michigan Form 4746 Lines 10, 17, or 25 must have amount
Form 4763	Michigan E-file is enabled +State Forms is NOT suppressed on Organizer States Common State Print Suppression +E-file requirement is selected as Stand-Alone filing on Organizer States Michigan E-file Additional
Form 4913	Suppress print if no payments are due after applying overpayment is NOT checked +Estimate is NOT suppressed on Organizer States Common State Print Suppression +Tax Forms States Michigan Form 4913 must have amount or NONE
Form 4917	Estimated Tax Options NOT selected as Suppress compute and print +Estimate is NOT suppressed on Organizer States Common State Print Suppression

Form 4918	Flow-Through Withholding Return is checked on Organizer States Michigan Return Options +Tax Forms is NOT suppressed on Organizer States Common State Print Suppression
Form 4919	Flow-Through Withholding Return is checked on Organizer States Michigan Return Options +Tax Forms is NOT suppressed on Organizer States Common State Print Suppression +Tax Forms States Michigan Form 4919 - Line 5 must have amount
Form 4920	Flow-Through Withholding Return is checked on Organizer States Michigan Return Options +Tax Forms is NOT suppressed on Organizer States Common State Print Suppression
Form 4946	Force print Form 4946 is checked on Organizer States Michigan Return Options +Tax Forms States Michigan Form 4946 - Lines 3, 10, 29, 35, or 39 must have amount
Form 4947	Tax Forms States Michigan Form 4947 - Lines 11, 28, or 39 must have amount
Form 4966	Tax Forms States Michigan Form 4966 must have entity name
Form 807 (Composite)	Organizer States Common State General Information Basic Return Information Filing Status (Tab) Michigan (Row) Composite Return (Column)
Form MI-1040H (Composite)	Organizer States Common State General Information Basic Return Information Filing Status (Tab) Michigan (Row) Composite Return (Column)

Michigan Cities: Common Forms

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

Form/Schedule	Requirement(s) to Print
CF-1065	State is active
CF-1065ES	Not suppressed in Organizer States Common State Print Suppression +Amount must exist on voucher
CF-7004	Not suppressed in Organizer States Common State Print Suppression +Return on Extension +Tentative Tax amount must exist OR Force print
Schedule K-1	Not suppressed in Organizer States Common State Print Suppression

Michigan Cities: Detroit

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

Form/Schedule	Requirement(s) to Print
Form 5458	Site activated on the State and City Activation Organizer +State Forms are NOT suppressed on Organizer States Common State Print Suppression
Form 5460	Not suppressed in Common State or in State Organizer +(Box checked to generate form +Tentative tax OR Force print even when tentative tax blank)

Minnesota

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

Form/Schedule	Requirement(s) to Print
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Form BANK	MN activated +Not suppressed +E-file enabled +Direct Debit info +Refund +Not paying by check.
Form EST	MN activated +(line 3 or Line 12 or Line 22)
Form ETP	MN activated + Line 4
Form M3	MN activated
Form M3A	MN activated
Form M-71	This form is blocked.
Form PV-44	This form is blocked.
Form PV-83	MN activated +Amount of Payment +Not suppressed OR MN Activated not suppressed +Force Print all state extensions
Schedule AWC	MN activated +Partner option to elect AWC +Not suppressed
Schedule KPC	MN activated +Corporate Partner type +Not suppressed
Schedule KPCNC	
Schedule KPI	MN activated +Non corporate Partner type +Not suppressed
Schedule KPINC	
SchLK	
SchMHP	
SchPTE	
SchPTE-RP	
SchRAIL	
SchRD	
SchTPD	

Mississippi

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

Form/Schedule	Requirement(s) to Print
Form 83-180	Has to be on Extension - Organizer States Common State General Information Basic Return Information Return Information tab column O, Return is on Extension +Extension cannot be suppressed - Organizer States Mississippi Extension Information uncheck Suppress extension +Not suppressed in Organizer States Common State Extension Options uncheck Suppress Extension.
Form 84-105	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Mississippi.
Form 84-115	Enable Mississippi e-file - Organizer States State E-file Enable/Create Returns check Enable Mississippi e-file.
Form 84-122	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for MS.

Form 84-124	Has to be Net Direct Income - Tax Forms States Mississippi 84-124 Page 2 Line 28, and on Page 3 Line 46.
Form 84-125	Has to be ratio other than NONE. Tax Forms States Mississippi 84-125 Column C, Lines 1, 2, or 3.
Form 84-131	There has to be partner number - Organizer Partner Information Partner by Partner Data Partner Name Partner Number.
Form 84-131, Schedule K	
Form 84-132	Not suppressed in Organizer States Common State Print Suppression uncheck Sch K-1, for MS +Not suppressed in Organizer States Mississippi Return Options "Print Suppression" uncheck Schedule K-1.
Form 84-132P, Schedule K-1	
Form 84-150	There has to be a total in a column - Tax Forms States Mississippi 84-150 See detail.
Form 84-155	Amount has to exist on Tax Forms States Mississippi 84-155 Line 2 column E +Organizer States Mississippi Return Options "Force Print" check (Net Operating Loss & Capital Loss Schedule).
Form 84-161	
Form 84-300	Has to be amount paid - Tax Forms States Mississippi 84-300 Amount Paid.
Form 84-387	Cannot be suppressed - Organizer States Mississippi Return Options "Print Suppression" uncheck Form 84-387 +Has to be amount of net gain or profit withheld - Tax Forms States Mississippi 84-387 Line 2 5% of net gain or profit withheld.
Form 84-401	Has to be total amount - Tax Forms States Mississippi 84-401 See detail Credit column.

Missouri

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

Form/Schedule	Requirement(s) to Print
Form MO-1040 (Composite)	Line 45 is Amount Paid on original return and Line 52 is Refund.Line 55 shows Amount due
Form MO-1065	State is active
Form MO-1065, Part II	
Form MO-1NR	Not suppressed +Line 2 is populated
Form MO-2NR	Not suppressed +Nonresident individual +Income subject to tax > \$1200
Form MO-3NR	Marked as filing Form 3NR - Organizer Partner Information Partner by Partner Data "Partner" Partner Information State Partner Information Missouri section +Not suppressed

Form MO-60	Not suppressed in Organizer States Common State Extension Options +Not suppressed in MO Organizer +Marked as On Extension - Organizer States Common State General Information Basic Return Information Return Information tab column O, Return is on Extension +(Line 1 is populated OR Select force print all state extensions even if tentative tax is blank - Organizer States Common State Extension Options)
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Form MO-MSS	Select either apportionment method One, Two or Two A - Organizer States Missouri Allocation and Apportionment
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Form MO-NRP	Not suppressed +Question "Does this partnership have any nonresident partners?" is marked Yes +Partner is nonresident
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Missouri Cities: Kansas City

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

Form/Schedule	Requirement(s) to Print
Form KC RD-108	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Kansas City.
Form KC RD-108B, Sch. C,Y, &Z	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for Kansas City.
Form RD-111	Not suppressed in Organizer States Common State Print Suppression uncheck Extension, for Kansas City +Not suppressed in Organizer Cities Kansas City Extension Information.
Schedule K-1 Equivalent	Not suppressed in Organizer States Common State Print Suppression uncheck Sch K-1 Equiv, for Kansas City.

Missouri Cities: St. Louis

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

Form/Schedule	Requirement(s) to Print
Form E-234	Not suppressed in Organizer States Common State Print Suppression uncheck State Forms, for St. Louis.
Form E-8	Not suppressed in Organizer States Common State Print Suppression uncheck Extension, for St. Louis +Not suppressed in Organizer Cities St. Louis Extension Information.
Schedule K-1 Equivalent	Not suppressed in Organizer States Common State Print Suppression uncheck Sch K-1 Equiv, for St. Louis.

Montana

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

Form/Schedule	Requirement(s) to Print
College Contribution Credit	Form is obsolete, not applicable after 2021(2021 was last to have it)
Form DER	Option to print Form DER must be selected in Organizer States Montana General Information FORM DER PAYMENT VOUCHER Print Form DER Payment Voucher

Form DER-1	Disregarded Entity Return is activated in Organizer States Montana Disregarded Entity Return. Generate a DER-1 return instead of PTE return
Form MT Recycle Credit/Deduction	There must be an amount on Part IV line, line 8 in Tax Forms States Montana Schedule II and Credit Forms Recycle Credit/Deduction, Page 2 tab. OR There must be an amount on Part V line, line 3 in Tax Forms States Montana Schedule II and Credit Forms Recycle Credit/Deduction, Page 2 tab.
Form PR	Option to print Form PR must be selected in Organizer States Montana General Information.
Form PT-AGR	There must be a partner that is marked as a nonresident with a signed Form PT-AGR in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information.
Form PTE	Disregarded Entity Return is not activated in Organizer States Montana Disregarded Entity Return.
Form PTE, Schedule III	schedule III not available in taxforms.
FormMTRCYL	Business name must exist.
Montana Adjustment Worksheet	Organizer/States/Montana/State Adjustments/Montana Adjustments amount must be present
MT Source Income Schedule	Amounts must exist in one of the table K1 or Schedule DE or Source income or PTE apportionment activities.
Schedule DE	Organizer/States/Montana/Disregarded Entity (Sch DE) is present in organizer.
Schedule Flow Through Payments	no condition
Schedule I PR1	Disregarded Entity Return is not activated in Organizer States Montana Disregarded Entity Return. +There must be data entered on line 4 in Tax Forms States Montana Schedule I.
Schedule II PR1	Disregarded Entity Return is not activated in Organizer States Montana Disregarded Entity Return. +There must be data entered for any of the credits in Tax Forms States Montana Schedule II.
Schedule IV PR1	Disregarded Entity Return is not activated in Organizer States Montana Disregarded Entity Return. +Partners must be marked as part of a composite return in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information tab. +There must be partner names in Tax Forms States Montana Schedule IV Part III Drill down on hyperlink "Partner detail.
Schedule K-1	Schedule K-1 print is not suppressed in Organizer States Montana Return Options. +Partner number must be entered in Organizer Partner Information Partner by Partner Data Partner Name Partner Information.
Schedule VI PR1	Disregarded Entity Return is not activated in Organizer States Montana Disregarded Entity Return. *Partner name must be present for the detail to print for line 8 in Tax Forms States Montana Schedule VI.
Schedule VII	Organizer/States/Montana/Disregarded Entity (Sch DE) is present in organizer.

Worksheet Apportionable
Income

Organizer/States/Montana/Disregarded Entities should be added.

Nebraska

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

Form/Schedule

Requirement(s) to Print

1065N-V

Payment Remitted has an amount

Form 1065N

State is active

Form 12N

Not suppressed +Partner is nonresident individual +Attached Form 12N checked - Organizer | Partner Information | Partner by Partner Data | "Partner" | Partner Information | State Partner Information | Nebraska section

Form 3800N

Form 1065N Form 3800N attached indicator is selected

Form 7004N

Not suppressed in Common State - Organizer | States | Common State | Extension Options +Not suppressed in Nebraska Organizer +Marked as On Extension - Organizer | States | Common State | General Information | Basic Return Information | Return Information tab | column O, Return is on Extension

PTC

PTC page 2 Part C line 6 or the total of PTC page 2 Part D must have an amount. Page 2 is not available.

PTET

Tax Forms | States | Nebraska | 1065N | Page 1 | the box for entity level taxation must be checked

Schedule K-1N

Not suppressed in Organizer | General Information | Return and Print Options | Sch K, K-1 and Activity Schedules +Not suppressed in Organizer | States | Common State | Print Suppression +Not suppressed in Nebraska Organizer +Partner has a partner number assigned - Organizer | Partner Information | Partner by Partner Data | Partner Name | Partner Number

Schedules I, II, and A

Schedule I Apportionment is less than 100% OR Force print Schedule I - Organizer | States | Nebraska | Return Options Schedule II State is active +For partner detail - Partners must be entered Schedule A State is active

Nevada

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

Form/Schedule

Requirement(s) to Print

Commerce Tax Return

Nevada forms are not suppressed in Organizer | States | Common State | Print Suppression. * Amounts will only print for lines 1-35 if the amount on line 9 is greater than \$4000000.

New Hampshire

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

Form/Schedule

Requirement(s) to Print

Form ADDL INFO

Form BET

Line 5 is populated

Form BET Worksheet

Form BET-80	Line 3 is populated OR Line 6 is populated OR Line 11 is populated
Form BT-EXT	Not suppressed in New Hampshire Organizer +Marked as On Extension - Organizer States Common State General Information Basic Return Information Return Information tab column O, Return is on Extension
Form BT-Summary	State is active
Form DP 131A	
Form DP-132	Line 11 Column D is populated
Form DP-160	Part A. BET Summary of Credits Line 8 is populated OR Part B. BPT Summary of Credits Line 8 is populated
Form DP-2210/2220	Page 2 Part III line 22 should have value to generate form
Form DP-80	Page 2 Part III line 22 should have value to generate form
Form NH-1065	State is active
Form NH-1065ES	Not suppressed +Not Final Return +At least one installment with Total Due Amount on Estimated Tax worksheet - Tax Forms States New Hampshire NH-1065-ES NH-1065-WS +Amount Due Total amount on Estimated Tax workpaper screen - Tax Forms States New Hampshire NH-1065-ES NH-1065-WS Drill down on Total Due

Form Schedule IV

New Jersey

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

Form/Schedule

Requirement(s) to Print

Form 1040-ES	Must check "Composite return filed for nonresident partners" in Organizer States New Jersey General Information +Must NOT check to "Suppress print of 1040-ES" in Organizer States New Jersey Composite Return +Final Return must NOT be checked on Tax Forms NJ-1065, Page 2 +Must have data entered on payment amount in Tax Forms New Jersey 1040-ES Vouchers
Form GIT-DEP, Pages 1, 4	Must have data entered on Tax Forms New Jersey GIT-DEP, Page 1 Part 1 Line 7 "New Jersey Depreciation Adjustment +Must NOT check to suppress "Depreciation schedule" in Organizer States New Jersey Return Options +To print Page 4. Must have and Asset name entered for column A and must have an amount entered in Column F "Adjustment to Federal Gain" in Tax Forms New Jersey GIT-DEP Page 4
Form NJ K-1	Must NOT check to Suppress "Schedule K-1 and partner activity schedules" in Organizer General Information Return and Print Options 3rd tab Sch K, K-1 and Activity Schedules +Must NOT check to Suppress NJ K-1s in Organizer Common States Print Suppression +To print a partner's NJ K-1, must have a partner name. +To print Nonresident NJ K-1s "Schedule K-1s for nonresident if no NJ source income" must NOT be checked in Organizer States NJ Return Options and Tax Forms States New Jersey Sch NJ K-1s (select a Nonresident Partner) Part 2 Column B Lines 1 through 5 must be blank

Form NJ PART-200-T	Must have data entered for "Enter amount of payment" in Tax Forms States New Jersey NJ-1065 NJ Part -200-T Extension +Must check the box to Enable NJ extension in Organizer States Common States General Information Basic Return Information spreadsheet 2nd Tab Return Information +Must NOT check to Suppress Extension for New Jersey in Organizer States Common States Extension Options
Form NJ-1065	Pages 1-2 - Activate the state of NJ Pages 3-5 - Partner name
Form NJ-1065 Partners Directory	
Form NJ-1065, Sch L	Tax Forms States New Jersey NJ1065 Schedule L Questions 1,2 and 3 must be Yes
Form NJ-1065E	Check box should be activated under Organizer/Partner Information/Partner by Partner Data/Partner one XXXXXXXXXXXXXXXXXXXXXXXXEND/Partner Information/State Partner Information/NJ-1065E information
Form NJ-1065-V	Must have data entered on Tax Forms States New Jersey NJ-1065 Folder NJ-1065-V Payment Voucher "Enter amount of payment here"
Form NJ-1080C, Schedules A, B	Must check "Composite Return" in Organizer States Common State General Information Basic Return Information Filing Status tab Schedule A - Must NOT be suppressed in Organizer States New Jersey Return Options +To print the partner info, each partner must have an Entity Code "NR" and the composite must be checked in Organizer States New Jersey Partner Information +Schedule B - Must NOT be suppressed in Organizer States New Jersey Return Options +Schedule B Partner info will print for partners that are not included in Schedule A.
Form NJ-1080-E	Must check "Composite Return" in Organizer States Common State General Information Basic Return Information Filing Status tab +Must NOT be checked to suppress "Form NJ-1080-E" in Organizer States New Jersey Return Options +Must have "X" entered to file Composite in Organizer States New Jersey Partner Information
Form NJ-630V	Must check "Composite Return" in Organizer States Common State General Information Basic Return Information Filing Status tab +Must have data entered for "Enter amount of payment here" in Tax Forms States New Jersey NJ-630-V Extensions
Form NJ-CBT-1065	Must NOT be checked to suppress "Form NJ CBT 1065" in Organizer States New Jersey Return Options +Must have data on Line 6 or Line 10 or Line 13 on Tax Forms States New Jersey NJ-CBT 1065, Page 2
Form NJ-CBT-160P	Must have an "X" on line 5 "Check if CBT-160-P attached" on Tax Forms States New Jersey NJ-CBT 1065, Page 2
Form NJ-CBT-206	Must check the Extension in Organizer States Common State General Information Basic Return Information under Return Information tab row "Common State" column o "Return on Extension" +Must not be suppressed in Organizer States Common State Extension Options New Jersey +Must have a data entered for "Enter amount of payment here" in Tax Forms States New Jersey NJ-CBJ-1065 NJ CBT 206 Extension
Form NJ-CBT-V	Must have data entered for "Enter amount of payment here" in Tax Forms States New Jersey NJ-CBT-1065 folder NJ-CBT-V Payment Voucher

Form NJ-NR-A	Form NJ-NR-A" print suppression box is NOT checked on Organizer States New Jersey Return Options +(Sch J, Part II, line (h) has data not equal to 100 OR "Form NJ-NR-A even when allocation ratio is 100%" force print box on the AL Return Options Organizer is checked)
FormCBT1065ES	
NJ-CBT-SchT	
Part 160	Must have an "X" on line 5 "Check if CBT-160-P attached" on Tax Forms States New Jersey NJ-CBT 1065, Page 2
PTE-100	Need to select "Elect to File PTE 100" in Organizer/States/New Jersey/Return Options
PTE-150	Need to enter amount in Organizer/States/New Jersey/Estimated Tax - PTE-150
PTE-200	Extension box should be checked under Organizer/States/Common State/Estimates and Extensions/Estimates and Extensions and payment amount should be available
SchCMDNJPTE	
Schedule A	Must have an "X" for Tiered Partnership in Tax Forms States New Jersey NJ-1065 Folder NJ-1065, Page 2
Schedule B	Must answered Yes to Line 1 and Line 2 on Schedule B in Tax Forms States New Jersey NJ-1065 Folder Schedule B +Must have data on Line 8 Column D in Tax Forms States New Jersey NJ-1065 Folder Schedule B
Schedule J	Must not check to suppress "Schedule J" in Organizer States New Jersey Return Options +Schedule J item H Apportionment factor can NOT equal to 100% in Tax Forms States New Jersey NJ-1065 Folder Schedule J +Client can force print Schedule J when the apportionment factor is equal 100% in Organizer States New Jersey Return Options Check "Schedule J even when allocation ratio is 100%
SchMDNJPTE	
SchNJNRRANJPTE	
SchNJNRRANJPTE	
SchO	Tax Forms States New Jersey NJ-1065 Schedule O Page 1 must have an amount or NONE on Line 16 and Schedule O must not be suppressed Organizer States New Jersey Return Options
SchPD	
SchPTE160	Tax Forms States New Jersey NJ-PTE-100 Page 1 must have the Line 3 checkbox indicated PTE-160 attached.
SchPTEK1NJPTE	

New Mexico

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

Form/Schedule

Requirement(s) to Print

Form PTE	New Mexico forms are not suppressed in Organizer States Common State Print Suppression.
Form PTE-A and PTE-B	New Mexico forms are not suppressed in Organizer States Common State Print Suppression.
Form PTE-PV	New Mexico forms are not suppressed in Organizer States Common State Print Suppression. +There is an Amount Enclosed in Tax Forms States New Mexico PTE-PV.
Form RPD-41096	New Mexico forms or extension are not suppressed in Organizer States Common State Print Suppression. +Extension is not suppressed in Organizer States New Mexico Extension Information. +Return is on extension in Organizer States Common State General Information Basic Return Information Return Information tab, column O.
Form RPD-41228	TRD - Approval number must be entered at Organizer States New Mexico RPD-41228 Enter Approval Number.
Form RPD-41285	New Mexico forms are not suppressed in Organizer States Common State Print Suppression. +Form is not suppressed in Organizer States New Mexico Return Options. +Partner number must be entered in Organizer Partner Information Partner by Partner Data Partner Name Partner Information. +Partner must be a nonresident partner. +Form must be marked to complete for each partner in Organizer States New Mexico Partner Information Partner Name. * It is possible to print only one partner per page for K-1 Package by going to Organizer States New Mexico Return Options.
Form RPD-41353	New Mexico forms are not suppressed in Organizer States Common State Print Suppression. +Print is not suppressed in Organizer States New Mexico Return Options. +Check box that Form RPD-41353 is on file must be selected in Organizer Partner Information Partner by Partner Data Partner Name Partner Information States Partner Information. +Partners must be nonresidents.
Form RPD-41359	New Mexico forms are not suppressed in Organizer States Common State Print Suppression. +Partner number must be entered in Organizer Partner Information Partner by Partner Data Partner Name Partner Information. +One of the options to complete Form RPD-41359 must be selected in Organizer States New Mexico Partner Information Partner Name. +There must be a New Mexico withholding amount in Tax Forms States New Mexico RPD-41359. +Partners must be nonresidents. * It is possible to print only one partner per page for K-1 Package by going to Organizer States New Mexico Return Options. * Also note that the check box that Form RPD-41353 is on file should not be selected in Organizer Partner Information Partner by Partner Data Partner Name Partner Information State Partner Information.
Form RPD-41367	New Mexico forms are not suppressed in Organizer States Common State Print Suppression. +Print is not suppressed in Organizer States New Mexico Return Options. +Page 2 will only print if partner names are present.
SchCMDNJPTTE	
Schedule K-1 Equivalent	New Mexico forms or Schedule K-1 are not suppressed in Organizer States Common State Print Suppression. +Print is not suppressed in Organizer States New Mexico Return Options. +Partner number must be entered in Organizer Partner Information Partner by Partner Data Partner Name Partner Information.

SchPTED

New York

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

Form/Schedule	Requirement(s) to Print
Form CT-2658	Not suppressed in Organizer States Common States Print Suppression New York Estimated tax +Must have at least 1 Nonresident Corporate partner selected in Organizer States New York Nonresident Estimated Tax Information Nonresident Estimated Tax
Form CT-2658-E	Not suppressed in Organizer States Common States Print Suppression New York Estimated tax +Not suppressed in Organizer States New York Return Options "Form CT-2658-E and IT-2658-E +Must have at least 1 Nonresident Corporate partner selected in Organizer States New York Nonresident Estimated Tax Information Nonresident Estimated Tax CT-2658E checked
Form CT-648	
Form CT-649	
Form CT-650	
Form DTF-686	Form DTF-686 Page 1 Line 1 must be present
Form DTF-686-ATT	Form DTF-686 Page 1 Line 1 must be present +Organizer States New York Tax Shelter Transactions Disclosure Statement Name of New York reportable transaction must be entered
Form IT-203-GR	Organizer States New York Composite Return: "Suppress Print of Form IT-203-GR" must not be checked. +Must select at least 1 selection "Generate a New York State composite return" or "Generate a City of Yonkers composite return" or Generate a MCTMT composite return"
Form IT-203-GR-ATT-A	Organizer States New York Composite Return: "Suppress Print of Form IT-203-GR" must not be checked. +Must select "Generate a New York State composite return +To include a partner in IT-203-GR-ATT, partner must have the New York Composite check in Organizer Partner Information State Partner Information State Composite Returns
Form IT-203-GR-ATT-B	Organizer States New York Composite Return: "Suppress Print of Form IT-203-GR" must not be checked. +Must select "Generate a City of Yonkers composite return +To include a partner in IT-203-GR-ATT, partner must have the Yonkers Composite check in Organizer Partner Information State Partner Information State Composite Returns
Form IT-203-GR-ATT-C	Organizer States New York Composite Return: "Suppress Print of Form IT-203-GR" must not be checked. +Must select "Generate a MCTMT composite return +To include a partner in IT-203-GR-ATT, partner must have "Include Partner in filing IT-203-GR-ATT-C (MCTMT)" check in Organizer Partner Information State Partner Information New York section
Form IT-204	Must have the New York State activated in Organizer States State and City Activation

Form IT-204.1	Must populate Form IT-204 Page 1, Item F, Line 2 Article 9-A OR have at least 1 partner that is a Partnership or LLC entity type.
Form IT-204-CP	Organizer States New York Return Options Suppress "All partners' Form IT-204-CP" must not be checked. +Must have at least 1 partner that is a "Corporate" or "S Corporate" entity type. Organizer Partner Information Partner by Partner Data under partner type "Type of entity"
Form IT-204-IP	Organizer States New York Return Options Suppress "All partners' Form IT-204-IP" must not be checked. +Must have at least 1 partner that is a "Disregarded Entity" or "Estate" or "Grantor Trust" or "Individual" or "Nominee" or Partnership" or "LLP" or "LLC" entity type. Organizer Partner Information Partner by Partner Data under partner type "Type of entity" Note: Exempt partners do not receive a NY K-1.
Form IT-204-LL	Organizer States New York IT-204-LL Return the Print Suppress of the IT-204-LL must not be checked. +LLC/LLP or Regular Partnership must be selected. on Tax Form States New York IT-204-LL Note: To select Regular Partnership - Part 2 Line 4 MUST be equal to or greater than 1,000,000.
Form IT-212	Organizer States New York Return Options check "Form IT-212"
Form IT-212-ATT	Organizer States New York Return Options check "Form IT-212-ATT"
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-236	Must have data on Tax Forms IT-236 Page 2 Part 5 Line 14 - Total credit
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 - Enter the lesser of line 9 or 5,000
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-256	Must have data on Tax Forms IT-256 Page 2 Part 5 Line 9 - Credit for the current tax year
Form IT-2658	Not suppressed in Organizer States Common States Print Suppression New York Estimated tax +Must have at least 1 Nonresident individual partner selected in Organizer States New York Nonresident Estimated Tax Information Nonresident Estimated Tax
Form IT-2658-E	Not suppressed in Organizer States Common States Print Suppression New York Estimated tax . +Not suppressed in Organizer States New York Return Options "Form CT-2658-E and IT-2658-E". +Must have at least 1 Nonresident Individual partner selected in Organizer States New York Nonresident Estimated Tax Information Nonresident Estimated Tax IT-2658E checked
Form IT-2658-MTA	Not suppressed in Organizer States Common States Print Suppression New York Estimated tax Must have at least 1 Nonresident individual partner selected in Organizer States New York Nonresident Estimated MCTMT Information Nonresident MCTMT Estimated Tax

Form IT-2658-NYS	Not suppressed in Organizer States Common States Print Suppression New York Estimated tax +Must have at least 1 Nonresident individual partner selected in Organizer States New York Nonresident Estimated Tax Information Nonresident Estimated Tax
Form IT-2659	Must check "Compute and print estimated tax" in Organizer States New York Underpayment Options
Form IT-370 Extension for IT-203-GR	Must check "Activate IT-370" in Organizer States New York Composite Return
Form IT-370-PF	Not suppressed in Organizer States Common States Print Suppression New York Extensions +Must be on extension - Organizer States Common State Extension Options New York "On Extension +Not suppressed in Organizer States New York Extension Information "Suppress extension
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-602	Must have data on Tax Forms IT-602 Schedule C Line 16 Total recapture EZ capital tax credit
Form IT-603	"Must have data on Tax Form IT-603 page 1 Schedule A Line 3 Net EZ-ITC and EZ-EIC available for use or Line 4 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	Must have data on Tax Forms IT-607 Part 1 Line 5 or Part 2 Line 10 or Part 3 Line 15 or Schedule E Line 42
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-634	Must have data on Tax Forms IT-634 Schedule A Line 5 or Schedule D Line 11

Form IT-635	Must have data on Tax Forms IT-635 Schedule A Line 1
Form IT-636	Must have answered Yes to Tax Forms IT-636 Schedule A Item B. +Must also have answered yes to one of the questions in Item C OR complete Schedule G.
Form IT-637	Must have data on Tax Forms IT-637 Page 2 Schedule E Line 11 or Schedule F Line 15
Form IT-638	Must have data on Tax Form IT-638 Item B or Item D
Form IT-639	Must have data on Tax Forms IT-639 Page 4 Schedule D Line 18
Form IT-640	Must have data on Tax Forms IT-640 Page 2 Schedule D Line 9
Form IT-641	Must have data on Tax Form IT-641 Page 3 Schedule D Line 11 or Schedule E Line 15
Form IT-642	Must have data on Tax Forms IT-642 Page 2 Schedule D Line 11
Form IT-643	Must have data on Tax Forms IT-643 Page 3 Schedule D Line 12
Form IT-644	Must have data on Tax Forms IT-644 Page 4 Schedule D Line 12
Form IT-645	Must have data on Tax Forms IT-645 Page 4 Schedule D Line 38
Form IT-646	Must have data on Tax Forms IT-646 Page 2 Schedule D Line 11
Form IT-651	
Form IT-652	
Form TR-579-PT	If e-filing IT-204, then NY IT-204 must be enabled to e-file in Organizer States State E-file +Must check to "Enable IT-204" in Organizer States New York NYS Signature Authorization. If e-filing IT-204-LL, then NY IT-204 -LL must be enabled to e-file in Organizer States State E-file +Must check to "Enable IT-204-LL" in Organizer States New York NYS Signature Authorization.
Form Y-204	Must check to "Generate Yonkers Nonresident Partner Allocation" in Organizer States New York Yonkers Return

Schedule K-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 NYC-114.10	Must have data on Tax Forms NYC-114.10 Line 1
Form NYC-114.5	Tax Forms 114.5 must check one "Type of Business" or Date entered for Unincorporated Business Tax year for which claim is made ended"
Form NYC-114.6	Must have data on Tax Forms 114.6 Page 1 Line 3
Form NYC-114.7	Must have data entered for Schedule B Distributing Partnership in Organizer Cities and Intangibles Mew York City Credits 114.7 UBT Paid Credit
Form NYC-114.8	Tax Forms 114.8: must check one "Type of Business" or Date entered for Unincorporated Business Tax year for which claim is made ended"

Form NYC-204	The state must be activated and must NOT be check to enable "Generate Form NYC-204EZ instead of Form NYC-204" in Organizer Cities and Intangibles New York City Return Options
Form NYC-204EZ	The state must be activated +Must check to enable "Generate Form NYC-204EZ instead of Form NYC-204" in Organizer Cities and Intangibles New York City Return Options
Form NYC-221	Must select "Always print form, but not add penalty" or "Always print form and add penalty" in Organizer Cities and Intangibles New York City Underpayment Options
Form NYC-399	Must have data on Tax Forms NYC -399 Line 8 column A (Federal) or Line 8 column B (New York City)
Form NYC-399Z	Must have data on Tax Forms NYC -399Z Line 8 column A (Federal) or Line 8 column B (New York City)
Form NYC-5UB	Not suppressed in Organizer States Common States Print Suppression +Must not have selected option to "Suppress compute and print" in Organizer Cities and Intangibles New York City Overpayment and Estimate Options 2nd Tab Estimate Options. +The NYC-204 Final return cannot be checked and must have at least \$1,500 on Tax Forms NYC-5UB Line 3. Note: If the Line 3 amount is less than 1,500 and is not a final return check "Compute estimate if estimated tax due is less than threshold" in Organizer Cities and Intangibles New York City Overpayment and Estimate Options 2nd Tab Estimate Options Under Compute and Print options
Form NYC-EXT	Not suppressed in Organizer States Common States Print Suppression New York City Extensions +Must be on extension - Organizer States Common State Extension Options New York City On Extension +Not suppressed in Organizer Cities and Intangibles New York City Extension Information "Suppress extension" +Data must be entered on Tax Forms NYC-EXT Line 1. Note: To force Print the NYC-EXT go to Organizer Cities and Intangibles New York City Extension Information check "Force print extension" and make sure "Suppress extension" is NOT checked
Form NYC-NOLD-UBTP	The state must be activated and must NOT be checked to enable "Generate Form NYC-204EZ instead of Form NYC-204" in Organizer Cities and Intangibles New York City Return Options +Must have data on Tax Forms NYC-204 last tab "NYC-NOLD-UBTP" Line 11 +Must not be suppressed in Organizer Cities and Intangibles New York City Return Options Under Suppression Options "Form NYC-NOLD-UBPT" can not be checked
Form NYC-UBPT	Must enable New York City E-file in Organizer States States E-file New York City +Check a box under part A - Declaration and authorization of Partner located in Organizer Cities and Intangibles Signature Authorization
Form NYC-WPE	Must have data on Tax Forms WPE Line 9
Schedule K-1 Equivalent	Not suppressed in Organizer States Common States Print Suppression New York City K-1s +Not suppressed in Organizer Cities and Intangibles New York City Return Options Under Print Suppression "NYC Schedule K-1 equivalents" must be unchecked

North Carolina

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

Form/Schedule	Requirement(s) to Print
Form D-403	Not suppressed in Common State - Organizer States Common State Print Suppression uncheck State Forms, for NC.
Form D-403, Part 4	
Form D-403TC	Not suppressed in Organizer States North Carolina Return Options +Amount exists on any line - Tax Forms States North Carolina Form D-403TC
Form D-410P	Not suppressed in Common State - Organizer States Common State Print Suppression uncheck Extension, for NC.
Form NC-478	Amount has to exist on Tax Forms States North Carolina Form NC-478 Page 2 Line 31I
Form NC478PassThrough	
Form NCEDU	Tax Forms States North Carolina NC-EDU must have an amount for contribution on the voucher
Form NC-K-1	Not suppressed in Federal - Organizer General Information Basic Return Information Return and Print Options Sch K, K-1 Activity Schedules tab. +Not suppressed in Organizer States North Carolina Return Options.
Form NC-NPA	Not suppressed in Organizer States North Carolina Return Options.
Form NCPE	Tax Forms States North Carolina NC-PE must have an amount or NONE on Line 16 for Total Additions or Line 41 for Total Deductions.
Form NCRehab	Organizer States North Carolina Credits Historic Rehabilitation Credit [Rehab Credit Name] checkbox to suppress print must not be checked AND Tax Forms States North Carolina NC-REHAB [Rehab Credit Name] must have an amount on Line 1 for total qualified rehab expenditures
Schedule NC K-1 Supplemental	Tax Forms States North Carolina Sch NC K-1 [Partner Name] must have an amount for Total Additions or Total Subtractions in either column.
Schedule NC K-1 supplemental	

North Dakota

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

Form/Schedule	Requirement(s) to Print
Form 58	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox
Form 58, Schedule K-1	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox. +Schedule K-1 is not suppressed on Organizer States North Dakota Return Options. +Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "North Dakota" checkbox.

Form 58-EPV	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox +Tax Forms States North Dakota Form 58-EPV "Amount of payment" must have a value.
Form 58-ES	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox +Form 58-ES is not suppressed on Organizer States North Dakota Return Options. +Tax Forms States North Dakota Form 58-ES "Amount of payment" must have a value.
Form 58-EXT	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox +Tax Forms States North Dakota Form 58-EXT "Amount of payment" must have a value.
Schedule K	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox
Schedule KSKP	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox
Schedule NDK-1	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox. +Schedule K-1 is not suppressed on Organizer States North Dakota Return Options. +Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "North Dakota" checkbox.
Schedule RZ	North Dakota is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Dakota" checkbox +Organizer States North Dakota Credits Add new Historic Property, Nonparticipating property, RFO Investment and RZ Income Exemption. +Tax Forms States North Dakota Sch RZ, Page 5 Part 7 Line 7 must have a value OR Tax Forms States North Dakota Sch RZ, Page 5 Part 7 Line 1c must have a value OR Tax Forms States North Dakota Sch RZ, Page 5 Part 7 Line 1h must have a value

SchFACT

SchNDK1Received

Ohio

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

Form/Schedule

Requirement(s) to Print

Form 1140ES	"Select ""Generate IT-1140ES"" in Organizer States Ohio IT 1140ES +Payment amount populated for each voucher needed to print"
Form 4708ES	Select "Generate IT-4708ES vouchers" in Organizer States Ohio IT 4708 IT 4708ES Estimated Tax Payments
Form 4738ES	
Form 4738P	
Form IT1140	Not suppressed +(Line 4 Column (I) is populated OR Line 4 Column (II) is populated OR Force print Form IT 1140 is selected)
Form IT4708	"Generate an Ohio composite tax return" is selected in Organizer States Ohio IT 4708 Basic Information

Form IT4738

Form OHITK1 Not suppressed in Organizer | States | Common State | Print Suppression + Not suppressed in Ohio Organizer +(Partner is an IT 1140 qualified investor OR Partner is an IT 4708 composite investor OR Force print is selected - Organizer | States | Ohio | Return Options - select Force Print "IT K-1 for investors who are not qualified for 1140 nor included on 4708")

Form OHITK1

Form OHITK1

Ohio Cities: Cincinnati

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

Form/Schedule

Requirement(s) to Print

Business Declaration of Estimated Income Tax Form must not be suppressed in Organizer | States | Common State | Print Suppression +Form must not be suppressed in Organizer | Cities and Intangibles | Cincinnati, OH | Print Options

Business Tax Return Cincinnati must be activated in Organizer | States | States and City Activation +Form must not be suppressed in Organizer | States | Common State | Print Suppression +Form must not be suppressed in Organizer | Cities and Intangibles | Cincinnati, OH | Print Options

Ohio Cities: Columbus

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

Form/Schedule

Requirement(s) to Print

Form BR-18 Form must not be suppressed in Organizer | States | Common State | Print Suppression +Form must not be suppressed in Organizer | Cities and Intangibles | Columbus, OH | Return Options | Print Suppression

Form BR-21 Form must not be suppressed in Organizer | States | Common State | Print Suppression +Form must not be suppressed in Organizer | Cities and Intangibles | Columbus, OH | Return Options | Print Suppression

Form BR-25 Columbus must be activated in Organizer | States | States and City Activation +Form must not be suppressed in Organizer | States | Common State | Print Suppression +Form must not be suppressed in Organizer | Cities and Intangibles | Columbus, OH | Return Options | Print Suppression

Form BR-42 Columbus must be activated in Organizer | States | States and City Activation +Form must not be suppressed in Organizer | States | Common State | Print Suppression +Form must not be suppressed in Organizer | Cities and Intangibles | Columbus, OH | Return Options | Print Suppression

Ohio Cities: Generic Cities

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

Form/Schedule

Requirement(s) to Print

Form R	Ohio Generic Cities must be activated in Organizer States States and City Activation +Ohio Generic Cities must not be suppressed in Organizer States Common State Print Suppression +Valid options must be selected in Organizer Cities and Intangibles Ohio Generic Cities, OH name of Generic City Ohio Generic City return Print Suppression Box
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Form R-ES	Ohio Generic Cities must be activated in Organizer States States and City Activation +Form must not be suppressed in Organizer States Common State Print Suppression +Valid options must be selected in Organizer Cities and Intangibles Ohio Generic Cities, OH name of Generic City Ohio Generic City return Extension information Box, Estimate Tax Box , and Print Suppression Box
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Form R-EX	Ohio Generic Cities must be activated in Organizer States States and City Activation +Form must not be suppressed in Organizer States Common State Print Suppression +Valid options must be selected in Organizer Cities and Intangibles Ohio Generic Cities, OH name of Generic City Ohio Generic City return Extension information Box, Estimate Tax Box , and Print Suppression Box
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Ohio Cities: Ohio CCA

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

Form/Schedule

Requirement(s) to Print

CCA Form 120 17-BR	Ohio CCA must be activated in Organizer States States and City Activation +Ohio CCA must not suppressed in Organizer States Common State Print Options Print Suppression +Form must not be suppressed in Organizer Cities and Intangibles Ohio CCA Return Options
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Form CCA-201ES	Form must not be suppressed in Organizer States Common State Print Options Print Suppression +Extension form must be selected in Organizer Cities Ohio CCA Cities, OH Return Options OR Form must not be suppressed in Organizer States Common State Print Options Print Suppression +Valid option must be selected Organizer Cities Ohio CCA Cities, OH Overpayment and Estimate Options Estimated Tax Tab +Form must not be suppressed in Organizer Cities Ohio CCA Cities, OH Return Options
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Ohio Cities: Ohio RITA

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

Form/Schedule

Requirement(s) to Print

Form 20	Form must not be suppressed in Organizer States Common State Print Options Print Suppression +Extension form must be selected in Organizer Cities Ohio RITA Cities, OH Return Options OR Form must not be suppressed in Organizer States Common State Print Options Print Suppression +Valid option must be selected in Organizer Cities Ohio RITA Cities, OH Overpayment and Estimate Options Estimated Tax Tab +Form must not be suppressed in Organizer Cities Ohio RITA Cities, OH Return Options
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Form 27	Ohio RITA must be activated in Organizer States States and City Activation +Ohio RITA must not suppressed in Organizer States Common State Print Suppression
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Oklahoma

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

Form/Schedule	Requirement(s) to Print
Form 501	At least 1 500-B exists and 501 is not suppressed in Organizer States Oklahoma Return Options
Form 514	Form 514 prints as state is active
Form 514, Part 5	Prints if partner exists on Schedule K-1 and on the "Partner Information" hyperlink on the face of the form
Form 514-PT	Have at least one composite member activated in Partner Information State Partner Information
Form OK500B	
Form OK511CR	
Form OK587PTE	
Form OW-15	OW-15 is checked for Partners in Organizer States Oklahoma Nonresident Withholding
Form OW-15A	OW-15A is checked for Partners in Organizer/states/Oklahoma/Transmittal of NonResident Member
Form WTP1003	Check to print WTP-1003 in Organizer States Oklahoma Withholding Tax Annual Report
Schedule K-1 Equivalent	Prints if Partner number exists and is not suppressed in Organizer States Oklahoma Return Options or Organizer Common State Print Suppression or General Information Return and Print Options Sch K, K-1 and Activity Schedules
WTP10005	Organizer States Oklahoma Estimated Withholding Tax Checkbox for "Print WTP 10005 estimates" should be checked

Oregon

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

Form/Schedule	Requirement(s) to Print
Form OC	Not suppressed + "Print Oregon Composite Return" is selected - Organizer States Oregon Non-Resident Information Composite Return General Information (adding partners to the composite return will automatically check this box)
Form OC, Schedule OR-OC-1	
Form OC, Schedule OR-OC-2	
Form OC1	Individual partner included in composite return OR Estate partner included in composite return OR Trust partner included in composite return
Form OC2	C Corporation partner included in composite return
Form OR-19	Not suppressed + Has at least one partner included on OR-19 - Organizer States Oregon Non-Resident Information General Information

Form OR-19-V	Not suppressed +Payment amount is populated
Form OR-65	State is active
Form21	
Form24	
FormCAT	
Sch21AP	
Sch21K1	
Sch21MD	
Sch21MDPT	
SchAFCAT	
Schedule AP	Not suppressed
Schedule OR-K-1	Not suppressed in Organizer General Information Return and Print Options Sch K, K-1 and Activity Schedules +Not suppressed in Common State - Organizer States Common State Print Suppression +Not suppressed in Oregon Organizer
SchEXCCAT	

Oregon Cities/Counties: Portland/Multnomah

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

Form/Schedule	Requirement(s) to Print
Form EXT	Not suppressed in Organizer States Common State Print Suppression
Form P-Current Year	State is active +Not suppressed in Organizer States Common State Print Suppression
FormMETBIT65	Not suppressed in organizer.
SchHVT	Not suppressed in organizer.
SchR	Form P is not suppressed

Pennsylvania

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

Form/Schedule	Requirement(s) to Print
Form ESR	
Form PA-205/65 Nonresident Withholding PMT	Tax Forms States Pennsylvania PA-20S\PA-65 Nonresident Withholding Pm, "Payment Amount" - has to have a value greater than zero +Following option is not selected: Organizer States Pennsylvania Return Options, "Print Suppression" section, "Nonresident Withholding Payment Voucher

Form PA-20S/PA-65	Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Pennsylvania" checkbox +The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners")
Form PA-40 ES	Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "Estimated Tax" column, "Pennsylvania" checkbox +The following option is not selected: Organizer States Pennsylvania Return Options, "Print Suppression" section, "Form PA-40ES Vouchers
Form PA-40 NRC	At least one partner has elected to be part of the Pennsylvania Composite return on Organizer Partner Information Partner by Partner Data Partner Name State Partner Information, "State Composite Returns" section
Form PA-65 Corp Directory	Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Pennsylvania" checkbox +Tax Forms States Pennsylvania PA-65 Corp, 2 Total number of corporate partners for this entity - has to have a value greater than zero +The following option is not selected: Organizer States Pennsylvania Return Options, "Print Suppression" section, "Form PA-65 Corp +One of the following has to be Yes: [all partners are Corporations on Organizer Partner Information OR (at least one partner has the following option selected: Organizer Partner Information Partner by Partner Data [Name] State Partner Information, "Pennsylvania" section, "Filing PA Schedule CP +Tax Forms States Pennsylvania PA-65 Corp, "4 Total CNI Tax Withholding..." is greater than zero)]
Form PA-65 Member Directory	Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Pennsylvania" checkbox +The following option is not selected: Organizer States Pennsylvania Return Options, "Print Suppression" section, "Member directory +The following is No: all partners are Corporations on Organizer Partner Information +At least one partner is available on Organizer Partner Information
Form PA-8453-P	One of the following has to be Yes: (Organizer States State E-file Enable/Create Returns, "PENNSYLVANIA" row - set to ENABLE OR Organizer States State E-file Enable/Create Extensions, "PENNSYLVANIA REV-276" row - set to ENABLE +The following is set to "Scanned Form 8453": Organizer States State E-file Enable/Create Returns, "PENNSYLVANIA" row, "SIGNATURE OPTION" column
Form PA-8879-P	One of the following has to be Yes: (Organizer States State E-file Enable/Create Returns, "PENNSYLVANIA" row - set to ENABLE OR Organizer States State E-file Enable/Create Extensions, "PENNSYLVANIA REV-276" row - set to ENABLE +The following is set to "Practitioner PIN": Organizer States State E-file Enable/Create Returns, "PENNSYLVANIA" row, "SIGNATURE OPTION" column
Form REV-1190	Amounts have to be available on Organizer States Pennsylvania Schedule M Schedule M - Col A (or equivalent), "Tax Worksheet for Schedule M, Part B, Section E, Line a" section, "Portion of Tax in Column 1 Based on Net Income" column

Form REV-276	Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Pennsylvania" checkbox +Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "Extensions" column, "Pennsylvania" checkbox +The following option is selected: Organizer States Common State Basic Return Information "Return Information" tab, "Return on Extension" column, "Pennsylvania" row
Form REV-414 Withholding Tax Worksheet	The following option is selected: Organizer States Pennsylvania Nonresident Estimated Tax Withholding Tax Worksheet, "Print REV-414 - Nonresident Withholding Tax Worksheet"
Schedule A	[Tax Forms States Pennsylvania Schedule A, "8 PA-taxable interest income" is greater than zero + The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners")]] OR The following option has to be selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Schedule A
Schedule B	The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners") +Tax Forms States Pennsylvania Schedule B, "9 PA-taxable dividend income..." has to have a value greater than zero.
Schedule CP	At least one partner has the following option selected: Organizer Partner by Partner Data Partner Name Partner Information State Partner Information, "Pennsylvania" section, "Filing PA Schedule CP"
Schedule D-I	Installment sale exists for Pennsylvania
Schedule D-II	Gains within Pennsylvania exist; conditions for Schedule D met
Schedule D-III	Gains outside Pennsylvania exist; conditions for Schedule D met
Schedule Directory	Partner allocations must be enabled +Pennsylvania Sch D, line 16 must have detail OR option to force Sch D and D-1 to print is selected on the Pennsylvania Schedule D Organizer +Option to suppress Sch D print is not selected on Organizer States Pennsylvania Return Options
Schedule D-IV	Gains outside Pennsylvania exist; conditions for Schedule D met
Schedule E	The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners") +There is a value greater than zero on one of the following: Tax Forms States Pennsylvania Schedule E, Line 24 OR Schedule E, Line 25
Schedule H	The following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Schedule H OR [the following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners") + Tax Forms States Pennsylvania Schedule H, "7 Net Income (Loss)... is greater than zero)]

Schedule H-Corp	At least one of the partners in the partnership has to be a Corporation, S-Corporation, Partnership, or LLC +The following options is not selected: Organizer States Pennsylvania Return Options Print Suppression, "Schedule NRK-1 +One of the following has to be Yes: (Tax Forms States Pennsylvania Schedule H-Corp, "Inside and Outside PA" column, "Total Sales" is greater than zero OR Tax Forms States Pennsylvania Schedule H-Corp, "Special Apportionment..." section, "(B) Denominator" is greater than zero OR the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Schedule H-Corp For the partner version of this form, the above conditions have to be met + The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners")
Schedule I	The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners") + one of the following has to be Yes: (Tax Forms States Pennsylvania Schedule I, "5 Amount of intangible development..." has a value greater than zero OR Tax Forms States Pennsylvania Schedule I, "8 Total Amortization" has a value greater than zero)
Schedule J	The following has to be No: All partners are Corporations on Organizer Partner Information + Tax Forms States Pennsylvania Schedule J, "(d) Total Income Everywhere", "Total Estate or Trust Income" has a value greater than zero.
Schedule M	The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners") + Tax Forms States Pennsylvania Schedule M Schedule M - Amount - Col A, "Total Rental Income (Loss) or Total Business Income..." column, "Section G. Total Taxable Income (Loss)" has a value greater than zero

Schedule NRK-1

Pennsylvania is not suppressed on Organizer | States | Common State | Print Suppression, "State Forms" column, "Pennsylvania" checkbox +The following option is not selected: Organizer | States | Pennsylvania | Return Options, "Print Suppression" section, "Schedule RK-1 and Schedule NRK-1 +The following option is not selected: Organizer | States | Pennsylvania | Return Options, "Print Suppression" section, "Schedule NRK-1 +The following option is not selected: Organizer | General Information | Return and Print Options | Sch K, K-1 and Activity Schedules, "Print or Suppress" section, "Schedule K-1 and partner activity schedules +Pennsylvania is not suppressed on Organizer | States | Common State | Print Suppression, "Schedule K-1/K-1 Equiv" column, "Pennsylvania" checkbox +At least one partner is available on Organizer | Partner Information +One of the following has to be Yes: [A partner is a nonresident of Pennsylvania OR A partner is a resident of Pennsylvania and is an S Corp (code 2), an Estate/Trust (code 4), or a Partnership (code 5) OR (A partner is a resident of Pennsylvania, and is an LLC (code 6), AND the following option is selected: Organizer | States | Pennsylvania | Return Options, "Force Print" section, "Schedules RK-1 and Schedule NRK-1 for all limited liability company partners")]] +The following has to be No: (All partners are Corporations on Organizer | Partner Information UNLESS the following option is selected: Organizer | States | Pennsylvania | Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners")

Schedule NW

One of the following has to be Yes: (Tax Forms | States | Pennsylvania | Schedule NW, "B Total Nonresident Withholding Payments..." has a value greater than zero OR Tax Forms | States | Pennsylvania | Schedule NW, "C Payment remitted with PA-40NRC..." has a value greater than zero OR Tax Forms | States | Pennsylvania | Schedule NW, "D Reconciliation Payment" has a value greater than zero) + The following option is not selected: Organizer | States | Pennsylvania | Return Options, "Print Suppression" section, "Schedule NW

Schedule OC

Pennsylvania is not suppressed on Organizer | States | Common State | Print Suppression, "State Forms" column, "Pennsylvania" checkbox + the following has to be No: (All partners are Corporations on Organizer | Partner Information UNLESS the following option is selected: Organizer | States | Pennsylvania | Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners") + Tax Forms | States | Pennsylvania | Schedule OC, "Total PA Other Credits" - has to have a value greater than zero

Schedule P-S KOZ

The following option is not selected: Organizer | States | Pennsylvania | Return Options, "Print Suppression" section, "Schedule P-S KOZ +The following has to be No: All partners are Corporations on Organizer | Partner Information +One of the following has to be Yes: (Tax Forms | States | Pennsylvania | Schedule P-S KOZ | Schedule P-S KOZ, "KOZ Exemption of Income Calculation" is selected OR Tax Forms | States | Pennsylvania | Schedule P-S KOZ | Schedule P-S KOZ, "SDA Exemption of Income Calculation") is selected

Schedule RK-1	<p>Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Pennsylvania" checkbox +The following option is not selected: Organizer States Pennsylvania Return Options, "Print Suppression" section, "Schedule RK-1 and Schedule NRK-1 +The following option is not selected: Organizer General Information Return and Print Options Sch K, K-1 and Activity Schedules, "Print or Suppress" section, "Schedule K-1 and partner activity schedules +Pennsylvania is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "Pennsylvania" checkbox +At least one partner is available on Organizer Partner Information +One of the following has to be Yes: [A partner is a resident of Pennsylvania OR A partner is a nonresident of Pennsylvania and is an S Corp (code 2), an Estate/Trust (code 4), or a Partnership (code 5) OR (A partner is a nonresident of Pennsylvania, and is an LLC (code 6), + The following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Schedules RK-1 and Schedule NRK-1 for all limited liability company partners")]] + The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners")</p>
Schedule T	<p>The following has to be No: (All partners are Corporations on Organizer Partner Information UNLESS the following option is selected: Organizer States Pennsylvania Return Options, "Force Print" section, "Form PA-20S/PA-65 when all partners are corporate partners") +Tax Forms States Pennsylvania Schedule T, "(a) PA-Source Winnings" column, "5 Total gambling and lottery winnings" has a value greater than zero</p>
SchRev276NRC	
Pennsylvania Cities: Philadelphia BIRT	
(Jurisdiction must be activated and released for forms/schedules to pri	
Form/Schedule	Requirement(s) to Print
BIRT Extension	<p>Philadelphia forms or extension are not suppressed in Organizer States Common State Print Suppression. +Return is marked as on Extension in Organizer Cities and Intangibles Philadelphia BIRT Extension Information. +Print is not suppressed in Organizer Cities and Intangibles Philadelphia BIRT Extension Information. +There must be an amount in Tax Forms Cities and Intangibles Philadelphia BIRT or BIRT-EZ BIRT Extension tab.</p>
BIRT Payment	<p>Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +Return is not marked as on Extension in Organizer Cities and Intangibles Philadelphia BIRT Extension Information. +Print is not suppressed in Organizer Cities and Intangibles Philadelphia BIRT Extension Information. +There must be a tax due amount in Tax Forms Cities and Intangibles Philadelphia BIRT or BIRT-EZ BIRT or BIRT-EZ Payment tab.</p>
BIRT Schedule A	<p>Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +Method 1 must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information. +BIRT must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information.</p>

BIRT Schedule B	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +Method 2 must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information. +BIRT must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information.
BIRT Schedule C1	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +BIRT must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information.
BIRT Schedule D	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +BIRT must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information.
BIRT Schedule E	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +BIRT MUST be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information. +A type of business must be selected in Organizer Cities and Intangibles Philadelphia Schedule E.
BIRT Schedule SC	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +There MUST be an amount on line 13 in Tax Forms Cities and Intangibles Philadelphia BIRT or BIRT-EZ Schedule SC tab.
Business Income & Receipts Tax	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +BIRT must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information.
Business Income & Receipts Tax E-Z	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +BIRT-EZ must be selected in Organizer Cities and Intangibles Philadelphia BIRT General Information.

Pennsylvania Cities: Philadelphia NPT

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

Form/Schedule	Requirement(s) to Print
Net Profits Tax Return	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +An NPT return must be generated in Organizer Cities and Intangibles Philadelphia NPT General Information. +Force print is selected in Organizer Cities and Intangibles Philadelphia NPT Return Options.)
NPT Payment Voucher	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +There is an amount due in Tax Forms Cities and Intangibles Philadelphia NPT NPT Payment.
Worksheet NR-3	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +Print is not suppressed for NPT worksheets in Organizer Cities and Intangibles Philadelphia NPT Return Options. +An amount is present on line 2 of Worksheet K in Tax Forms Cities and Intangibles Philadelphia NPT Worksheets D, E, and K tab.

Worksheets A, B, and C	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +(An amount is present on Worksheet A, line 4 in Tax Forms Cities and Intangibles Philadelphia NPT Worksheets A, B, and C tab. OR +An amount is present on Worksheet B, line 6 in Tax Forms Cities and Intangibles Philadelphia NPT Worksheets A, B, and C tab. OR An amount is present on Worksheet C, line 3 in Tax Forms Cities and Intangibles Philadelphia NPT Worksheets A, B, and C tab.) +Print is not suppressed for NPT worksheets in Organizer Cities and Intangibles Philadelphia NPT Return Options.
Worksheets D, E, and K	Philadelphia forms are not suppressed in Organizer States Common State Print Suppression. +(An amount is present on Worksheet D, line 8 in Tax Forms Cities and Intangibles Philadelphia NPT Worksheets A, B, and C tab. OR +An amount is present on Worksheet E, line 4 in Tax Forms Cities and Intangibles Philadelphia NPT Worksheets A, B, and C tab. OR An amount is present on Worksheet C, line 3 in Tax Forms Cities and Intangibles Philadelphia NPT Worksheets A, B, and C tab.) +Print is not suppressed for NPT worksheets in Organizer Cities and Intangibles Philadelphia NPT Return Options.

Rhode Island

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

Form/Schedule	Requirement(s) to Print
Form 1120V	RI-1120 print +Amount enclosed
Form 2220	
Form RI 1065-V	RI-1065 print +Amount enclosed
Form RI 1096-PT	Print is not suppressed under Organizer States Rhode Island Return Options
Form RI 1096PT-ES	There is any estimate amount +Print is not suppressed under Organizer States Rhode Island Return Options. Form name changed to BUS EST.
Form RI 1099-PT	Print is not suppressed under Organizer States Rhode Island Return Options +Partner is nonresident, not a composite member and has withholding amount
Form RI-1040C	Composite return is checked under Organizer States Common States General Information Basic Return Information Filing Status tab +Print is not suppressed under Organizer States Rhode Island Return Options
Form RI-1040C-ES	There is any estimate amount +Print is not suppressed under Organizer States Rhode Island Return Options
Form RI-1040C-NE	Form generation is checked under Organizer Partner Information Partner by Partner Data State Partner Information Rhode Island section +Not suppressed under Organizer States Rhode Island Return Options
Form RI-1040C-V	Print is not suppressed under Organizer States Rhode Island Return Options +Amount is enclosed
Form RI-1065	Partnership is checked under Organizer States Rhode Island General Information
Form RI-1120S	Partnership and RI-1120 both checked under Organizer States Rhode Island General Information

Form RI-4868C	Extension is checked and not suppressed under Organizer States Rhode Island Composite Return Extension Information tab +Line D has amount
Form RI-4868PT	Extension is checked and not suppressed under Organizer States Rhode Island Withholding Return Extension Information tab Line D has amount
Form RI-7004	Extension is checked +Print suppression is not checked under Common State for Rhode Island Extension. Form name changed to BUS EXT.
Form RI-Bus Ext	
RI Schedule CR-PT	Line 6 has amount
RI-1065 Schedule K-1	Print is not suppressed under Organizer States Rhode Island Return Options Print Suppression +Not suppressed under Organizer States Common State Print Suppression
RI-1120S Schedule K-1	
Schedule PTW	

South Carolina

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

Form/Schedule	Requirement(s) to Print
Form 1099 MISC	Not suppressed in Organizer States South Carolina Return Options Print Suppression + Amount should be on line 16.
Form I-333	Tax Forms South Carolina I-333 Anhydrous Ammonia Additive Credit Line 1 must be greater than 0
Form I-334	Tax Forms South Carolina I-334 Milk Credit Line 8 must be greater than 0
Form SC 1040 (Composite)	Organizer Partner Information (Partner Name) Partner Information State Partner Information State Composite Returns select South Carolina
Form SC I-309	Not suppressed in Organizer States South Carolina Return Options Print Suppression
Form SC-1040TC	Tax Forms South Carolina SC-1040TC Line 18 must have a value
Form SC-1065	State is active
Form SC-1065 ES	
Form SC-1065, Schedule K-1	
Form SC-4868	"Organizer Partner Information (Partner Name) Partner Information State Partner Information State Composite Returns select South Carolina +Organizer/States/Common State/Estimates and Extensions/Estimates and Extensions/Check box of South carolina composite"
Form SC-8736	"Not suppressed in Organizer States Common State Print Suppression Extension +Tax Forms States South Carolina SC8736 payment must exist"
Schedule I-435	
Schedule NR	Organizer Partner Information (Partner Name) Partner Information State Partner Information State Composite Returns select South Carolina

Schedule SC-K

Schedule SC-K is changed to SC1065 Page 2.

Tennessee

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

Form/Schedule

Requirement(s) to Print

Application - Franchise &
Excise Tax Exemption

Option to print the tax exemption certification statement is selected

Form FAE-170

Tennessee Franchise is activated +Option to suppress the forms has not been
selected +Not a financial return

Form FAE-170, Schedule X

FAE-170 conditions are met +Schedule X, line 16 has amount for current year
franchise tax jobs creditForm FAE-170, Schedules A,
B, C, D, E, F1, F2, G, H, J1, J2,
J3, J4, J, K, LForm FAE-170, Schedules M,
N, N1, SC, O, P, RFAE-170 conditions are met +Option to suppress these schedules is not selected
+(Sch N, line 18 has data OR Sch O, line 4 has data OR Sch P, line 4 has data OR
Sch R, line 4 has data OR Sch S, line 1 has data)Form FAE-170, Schedules NC
and SF

Member has elected to compute consolidate net worth

Form FAE-170, Schedules S,
T, U, VFAE-170 conditions are met For Sch T, Sch T, line 11 for current year excise tax
credit has an amount OR the option to force print Sch T is selected For Sch U and
V, option to suppress Sch U and V is not selected +Either Sch U or Sch V has total
amounts

Form FAE-170, WksRoD

Form FAE-172

Option to compute and print estimated tax is selected +There is an estimated tax
amount +Not a final return

Form FAE-173

Option to print FAE-173 is selected +Option to suppress the extension is not
selected +Tentative tax amount on line 1 or line 2 of this form

Form FAE-174

Financial tax return

Form FAE-174, Schedules M,
N, N1, SC, SESch N print if captive REITS +Data exists Sch M prints if there is data on Sch M,
lines 8 or 9Form FAE-174, Schedules NC
and SchFandSFFAE-174 condition is met +Financial consolidated return For NC, part of an
affiliated group but not a financial affiliated groupForm FAE-174, Schedules T,
U, V, XFor Sch T, Sch T, line 11 has an amount OR the schedule is forced to print option is
selected For Sch U, the option to suppress print has not been selected +There is
a total amount of loss carryover available

Form FAE-174: WksRoD

Form FAE-183

Option to print suppress FAE-183 is not selected +Form has data

Form IE-N

FAE-17 condition is met +Captive REITS

Form INC-250

Tennessee is activated to generate

Form INC-251	Tennessee return is on extension +Extension has not been suppressed +Either a tentative tax exists or the option to print the extension with no tentative tax has been selected
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Form RV-F1406501

Form174: Schedules A, B, C,
D, E, F1, F2, G, H, J1, J2, J3, J4,
J, K

Franchise & Excise Intangible Expense Disclosure	FAE-170 conditions are met +Name\FEIN of affiliate exists on this disclosure form
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Texas

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

Form/Schedule

Requirement(s) to Print

Form 05-102	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +All severe diagnostics have been cleared +Not suppressed under Organizer State Franchise Tax Texas Franchise Return Options Print Suppression + "Yes" checked under Organizer State Franchise Tax Texas Franchise General Information General Information "Corporation, LLC, professional association..." +Final Return not checked under Organizer States Common State General Information Basic Return Information Return Information tab Final Return + "This entity does not have NEXUS in Texas" not checked under Organizer State Franchise Tax Texas Franchise General Information General Information +Taxpayer number required +Report year required +Diagnostics cleared
Form 05-158	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +Not a 05-169 E-Z Calculation Report +Not a 05-163 No Tax Due Information Report +Tax rate exists on 05-158B +Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information +Diagnostics cleared
Form 05-160	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +(Data exists under Tax Forms States Texas 05-160, Credit Summary Schedule Total credits claimed OR Force print Form 05-160 selected under Organizer State Franchise Tax Texas Franchise Return Options Force Print) +Not a 05-169 E-Z Calculation Report +Not a 05-163 No Tax Due Information Report +Tax rate exists on 05-158B +Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information +Diagnostics cleared
Form 05-163	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +Qualifies under Organizer State Franchise Tax Texas Franchise Return Options No Tax Due Report +Tax rate exists on 05-158B +Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information +Diagnostics cleared

Form 05-164	Texas is active/combined in the return + Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Return on extension checked under Organizer States Common State General Information Basic Return Information Return Information Return on extension OR under Organizer State Franchise Tax Texas Franchise Extension Information Type of Extension + Taxpayer number required + Report year required + Taxpayer name is required + Diagnostics cleared
Form 05-165	Texas is active/combined in the return + Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Combined report checked under Organizer State Franchise Tax Texas Franchise General Information General Information Combined Report + Affiliate detail exists under Organizer State Franchise Tax Texas Franchise Combined Return Information Affiliate Detail + (Return on extension checked under Organizer States Common State General Information Basic Return Information Return Information Return on extension OR Regular extension or first extension mandatory EFT payers under Organizer State Franchise Tax Texas Franchise Extension Information Type of Extension) + Taxpayer number required + Report year required + Taxpayer name is required + Diagnostics cleared
Form 05-166	Texas is active/combined in the return + Texas is not suppressed on Organizer States Common State Print Suppression, State Forms column, Texas checkbox + (Parent name exists OR Affiliates detail exists) + Combined report checked under Organizer States Texas General Information General Information Combined Report + Tax rate exists on 05-158B + Accounting year end date exists under Organizer States Texas General Information General Information + Diagnostics cleared
Form 05-167	Texas is active/combined in the return + Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + All severe diagnostics have been cleared + Not suppressed under Organizer State Franchise Tax Texas Franchise Return Options Print suppression + "No" checked under Organizer State Franchise Tax Texas Franchise General Information General Information "Corporation, LLC, professional association..." + Final Return not checked under Organizer States Common State General Information Basic Return Information Return Information tab Final Return + "This entity does not have NEXUS in Texas" not checked under Organizer State Franchise Tax Texas Franchise General Information General Information + Taxpayer number required + Report year required + Diagnostics cleared
Form 05-169	Texas is active/combined in the return + Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Meets E-Z revenue report threshold + Total tax due on 05-158B is greater than total tax due on 05-169 + Not a No Tax Due Report + Tax rate exists on 05-158B + Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared

Form 05-170	Texas is active/combined in the return + Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Tax rate exists on 05-158B + Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared One of the following has to be Yes: (Data exists under Tax Forms States Texas 05-170, Payment Form Total amount due and payable + Not a no Tax Due Information Report) OR Force print Form 05-170 checked under Organizer State Franchise Tax Texas Franchise Return Options Force Print
Form 05-175	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +Partnership detail entered under Organizer State Franchise Tax Texas Franchise Tiered Partnership +Tired partnership election checked under Organizer State Franchise Tax Texas Franchise General Information General Information "Total Revenue is adjusted for Tiered Partnership Election +Tax rate exists on 05-158B +Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information +Diagnostics cleared
Form 05-177	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +Combined return +Taxpayer name exists under Tax Forms States Texas 05-177, Common Owner Report +Tax rate exists on 05-158B +Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information +Diagnostics cleared
Form 05-178	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +Data exists under Tax Forms States Texas 05-178, Research and Development Credit R&D activities credit available +Not a 05-169 E-Z Calculation Report +Not a 05-163 No Tax Due Information Report +Tax rate exists on 05-158B +Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information +Diagnostics cleared
Form 05-180	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +Amount of historic structure credit claimed exists under Organizer State Franchise Tax Texas Franchise Historic Structure Credit Amount of credit claimed +Not a 05-169 E-Z Calculation Report +Not a 05-163 No Tax Due Information Report +ax rate exists on 05-158B +Accounting year end date exists under Organizer State Franchise Tax Texas Franchise General Information General Information +Diagnostics cleared
Form 25-103	Texas is active/combined in the return +Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox +Amount exists under Tax Forms States Texas 25-103, Insurance Tax Report Total premiums allocated to Texas from all supplements

Utah

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

Form/Schedule

Requirement(s) to Print

Form TC-250	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +Tax Forms States Utah TC-250 Part I "Utah Nonrefundable Credits.." hyperlink Non-refundable Credits "Name" and "Credit" must be entered. OR Tax Forms States Utah TC-250 Part I "Utah Nonrefundable Credits.." hyperlink Refundable Credits "Name" and "Credit" must be entered. OR Tax Forms States Utah TC-250 Part I "Utah Nonrefundable Credits.." hyperlink Mineral Production Credits "Name" and "Credit" must be entered.
Form TC-544	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +Tax Forms States Utah TC-544 Field "Payment amount enclosed" must have a value.
Form TC-559	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +Organizer States common state Estimates and Extensions Estimated options Estimate Option drop-down menu Must NOT be selected as "Suppress compute and print +Estimated Tax is not suppressed on Organizer States Common State Print Suppression, "Estimated Tax" column, "Utah" checkbox +Tax Forms States Utah TC-559 Estimate Worksheet "Current Year Estimated Tax" must have a value greater than NONE. +Tax Forms States Utah TC-559 Estimate Either Voucher 1, Voucher 2, Voucher 3 or Voucher 4 must have "Payment amount enclosed" value.
Form TC-65	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox
Form TC-65, Schedule K	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox
Form TC-65, Schedule K-1	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox. +Schedule K-1 is not suppressed on Organizer States Utah Return Options. +Schedule K-1 is not suppressed on Organizer States Common State Print Suppression, "Schedule K-1/K-1 Equiv" column, "Utah" checkbox.
Form TC-65, Schedule N	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +Schedule N is not suppressed on Organizer States Utah Return Options. +(Partners cannot be a "Resident" AND "Individual" OR Partners cannot be selected as "Exempt Organization" as type of entity)
Form TC-65A	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +Tax Forms States Utah Sch A Line 14 "Utah apportioned business income" must have a value.
Form TC-65N	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +Schedule N is not suppressed on Organizer States Utah Return Options. +(Partners cannot be a "Resident" AND "Individual" OR Partners cannot be selected as "Exempt Organization" as type of entity)
Schedule A	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +Tax Forms States Utah Sch A Line 14 "Utah apportioned business income" must have a value.

Schedule H	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +(Tax Forms States Utah Sch H Part 1 Line 3 must have a value OR Tax Forms States Utah Sch H Part 1 Line 5 must have a value OR Tax Forms States Utah Sch H Part 1 Line 6 must have a value OR Tax Forms States Utah Sch H Part 2 Line 17 must have a value OR Tax Forms States Utah Sch H Part 2 Line 19 must have a value OR Tax Forms States Utah Sch H Part 2 Line 20 must have a value)
Schedule J	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox +(Tax Forms States Utah Sch J, Page 2 Part 1 Line 9 must have a value OR Tax Forms States Utah Sch J, Page 2 Part 2 Line 13 must have a value OR Tax Forms States Utah Sch J, Page 2 Part 3 Line 14 must have a value)
Schedule K	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox

Vermont

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

Form/Schedule	Requirement(s) to Print
Form 8879-VT-C	State is active and e-file is active
Form BI-471	Form BI-476 is not chosen to print under Organizer States Vermont Return Options Force Print
Form BI-473	Composite return is checked under Organizer States Common State General Information Basic Return Information Filing Status tab Make sure the BI-476 is not being force-printed under Organizer States Vermont Return Options
Form BA-403	Extension is checked under Organizer States Common State General Information Basic Return Information Return information tab +Line 3 has amount +Print suppression is not checked under Common State for Vermont Extension
Form BA-404	Line 11 column D Total has an amount
Form BA-406	Line 11 has an amount and the Schedule K-1VT is printing
Form BI-470	There is an amount in payment voucher
Form BI-472	Composite return is not checked under Organizer States Common State General Information Basic Return Information Filing Status tab
Form BI-476	Form BI-476 is chosen to print under Organizer States Vermont Return Options Force Print
Form BI-477	BI-471 Page 1 Line B must be marked Yes and there must be a value on Line 40 of the BI-477.
Form WH-435	There is a estimate amount on the form +Print Suppression is not checked under Organizer States Common State Print Suppression Estimated Taxes
Schedule K-1VT	Form BI-471 is print +If the form is not suppressed under Organizer States Vermont Return Options Print Suppression +Not suppressed under Organizer States Common State Print Suppression

Schedule K-1VT Pg 2

Form BI-471 is print +If the form is not suppressed under Organizer | States | Vermont | Return Options | Print Suppression +Not suppressed under Organizer | States | Common State | Print Suppression

Virginia

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

Form/Schedule

Requirement(s) to Print

Form 500C

Form 502PTET prints and the checkbox on Form 502PTET, page 2, Section III, line 16c is checked.

Form 502

State is active and the box on Tax Form 502PTET for Certify election to pay VA income tax at the entity level for the taxable year is NOT populated

Form 502FED-1

Form 502 prints and final date determination or a net change amount

Form 502V

Form 502V is not suppressed and there is a payment amount greater than zero on Form 502V

Form 502W

Form 502W is not suppressed and there is a payment amount greater than zero on Form 502W

Form 765

Organizer | Partner Information | (Partner Name) | Partner Information | State Partner Information | State Composite Returns OR the following option is selected: Organizer | States | Virginia | General Information | GENERAL INFORMATION section | Unified nonresident return filed

Form 765, Schedule L

Not suppressed in Organizer | States | Common State | Print Suppression | Extension

Form 770ES

Organizer /state/common state/estimates and extension/estimate option/additional state information

Form VA-8453P

Form VA-8453P not suppressed and declaration statement and PIN or EIN method used

Form VA-8879P

Form VA-8879P is not suppressed and PIN and electronic filing signature information and electronic filing enabled.

Form502PTET

State is active and the box on Tax Form 502PTET for Certify election to pay VA income tax at the entity level for the taxable year is populated

Schedule 502A

Tax Forms | States | Virginia | Schedule 502A | Section B line 1, percentage OR Section B, line 2f percentage OR Section B, line 2d percentage OR Section C, line 4 must exist

Schedule 502ADJ

Not suppressed in Organizer | States | Virginia | Return Options | Print Suppression and Form 502 prints

Schedule PTETADJ

Not suppressed in Organizer | States | Virginia | Return Options | Print Suppression and Form 502PTET prints

Schedule VK-1

Not suppressed in Organizer | States | Common State | Print Suppression

West Virginia

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

Form/Schedule	Requirement(s) to Print
EPT-100	West Virginia is an active state in the Organizer States State & City Activation and EPT-100 election is made in the Organizer States West Virginia Return Options
EPT-100 Partner Report (NR)	West Virginia is an active state in the Organizer States State & City Activation and EPT-100 election is made in the Organizer States West Virginia Return Options and Partner is NOT considered a Resident of West Virginia, as defined in Organizer Partner Information Partner by partner data [Partner Name] "State Partner Information" tab "State of Residency" dropdown is NOT set to either "All States (Default)" or "West Virginia" specifically.
EPT-100 Partner Report (RES)	West Virginia is an active state in the Organizer States State & City Activation and EPT-100 election is made in the Organizer States West Virginia Return Options and Partner is considered a Resident of West Virginia, as defined in Organizer Partner Information Partner by partner data [Partner Name] "State Partner Information" tab "State of Residency" dropdown is either "All States (Default)" or "West Virginia" specifically.
Form 140NRC	Check Composite Return - Organizer States Common State General Information Basic Return Information Filing Status tab column E.
Form PTE-100	Not suppressed in Organizer States Common State Print Suppression State Forms
Form PTE-100APT	Has to be an apportionment factor less than 1 - Tax Forms States West Virginia SPF-100 Line 8. OR There must be a value on SPF-100, Page 1, Schedule A1, Line 9 OR There must be a value on SPF-100, Page 1, Schedule A2, Line 9 OR There must be a value on SPF-100, Page 2, Part 2, Column 3 OR There must be a value on SPF-100, Page 2, Part 3, Column 3
Form PTE-100ES	Not suppressed in Organizer States Common State Print Suppression Estimated Tax.
Form PTE-100EXT	Activated in Organizer States Common State General Information Basic Return Informaion Return Information tab Column O +Not suppressed in Organizer States Common State Print Suppression Extensions.
Form PTE-100TC	Has to have a total amount on one 1 of the 2 columns - Tax Forms States West Virginia SPF-100 SPF-100TC.
Form WV/NRW-2	Not suppressed in Organizer States West Virginia Return Options +Partner has to be nonresident and not file Form NRW-4 - Organizer Partner Information Partner Name State Partner Information tab "West Virginia".
Schedule A	Not suppressed in Organizer States Common State Print Suppression State Forms
Schedule B	Not suppressed in Organizer States Common State Print Suppression State Forms
Schedule D	At least one entity is entered in the Organizer States West Virginia Basic Information "Reportable Entities (Schedule D)" section.

Schedule EK-1	West Virginia is an active state in the Organizer States State & City Activation and EPT-100 election is made in the Organizer States West Virginia Return Options and Partner type is NOT a C-Corporation as defined in the Organizer Partner information Partner by partner data [Partner Name] Partner information Partner Type section "Type of Entity"
Schedule K-1	Not suppressed in Organizer States Common State Print Suppression Sch K-1 + Not suppressed in Organizer States West Virginia Return Options, "Print Suppression"
Schedule K-1C	Not suppressed in Organizer States Common State Print Suppression Sch K-1 + Not suppressed in Organizer States West Virginia Return Options, "Print Suppression" + Partner Type is set to "Corporation" on the following: Organizer Partner Information Partner Name Partner Information, "Partner Type"
Schedule SP	Partner number must exist +Not suppressed in Organizer States West Virginia Return Options.

Wisconsin

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

Form/Schedule	Requirement(s) to Print
Form 1CNP	Form 1CNP, line 1 must have value. + (1CNP is not suppressed in Organizer States Wisconsin Return Options OR the following option is selected: Organizer States Wisconsin Return Options FORCE PRINT section Form 1CNP)
Form 1CNP, Schedule 2	
Form 3	Form 3 prints as state is active
Form A-1	The following are not suppressed for Form A-1 in Organizer States Wisconsin Return Options: Page 1, line 17 OR Page 3, line 38 OR Page 4, line 16a OR Page 4, line 8a.
Form A-2	The following are not suppressed for Form A-2 in Organizer States Wisconsin Return Options: Page 1, line 13 OR Page 2, line 13 OR Page 3, Part I-C, line 9 OR Page 3, Part I-D, line 9 OR Page 5, line 25 OR Page 6, line 30 OR Page 7, line 10
Form C	
Form N	The following are not suppressed for Form N in Organizer States Wisconsin Return Options: line 8 or 9 line 12
Form PW-1	Form PW1, Page 1, line 1 has value +Form PW1 is not suppressed in Organizer States Wisconsin Return Options
Form PW-1, Part 2	
Form PW-ES	Form PW-ES Amount of payment has value
Form PWU	
Schedule 3-ET	
Schedule 3K-1	3K-1 is not suppressed in Organizer States Wisconsin Return Options or Organizer States Common State Print Suppression or General Information Return and Print Options Sch K, K-1 and Activity Schedules

Schedule A-01

Schedule A-02

Schedule A-03

Schedule A-04

Schedule A-05

Schedule A-06

Schedule A-07

Schedule A-08

Schedule A-09

Schedule A-10

Schedule A-11

Schedule AR

Schedule BD

Schedule DE Sch DE prints when Form 3, Page 1, line H is checked.

Schedule EC

Schedule ED

Schedule EIT

Schedule ES

Schedule ET-OS

Schedule HR

Schedule JT

Schedule LI

Schedule MA-A Sch MAA, Page 2, line 22 has value

Schedule MA-M Sch MAM, Page 2, line 22 has value

Schedule R Sch R, Page 2, line 18 has value

Schedule RT Sch RT is not suppressed in Organizer | States | Wisconsin | Return Options +Form
Sch RT, Page 1, line 5 or Page 2, line 7 has value

Schedule U

Schedule VC