

Federal

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

Form/Schedule

Requirement(s) to Print

Carryover Schedules:
Contributions, SRLY/Non-SRLY NOLs, Capital Losses, Credits, Bad Debt Schedules, 1231 Losses, Depletion, Section 179, Passive losses

Organizer | General Information | Return and Print Options | Basic Options | Option to suppress Schedule detailing carryovers to next year is not selected + value exists in the carryover to next year field for the applicable tax attribute

Carryover Schedules:
Historical

Organizer | Carryovers, Footnotes, and Invoicing | Carryovers | Carryovers - History | Carryover Description | Carryover Options | Carryover Schedule Attachment Option is selected + Organizer | Carryovers, Footnotes, and Invoicing | Carryovers | Carryovers - History | Carryover Description | Type of Carryover | Type of Carryover | Suppress print of this schedule is not selected + There is carryover amount remaining for the applicable tax attribute

Financial Institution Bad Debts

Organizer | General Information | Return and Print Options | Basic Options | Attachments | All white paper statements with return is NOT selected + not a top consolidated return + not a division within a divisional consolidation + Organizer | General Information | Return and Print Options | Pg 1-5 Options | Page 1 Schedules | Bad debts is NOT selected + at least one of the following fields has data: Tax Forms | Federal | Financial Institution Bad Debt | Bad Debts Summary | Addition to Reserves for Bad Debts | Banks Tax Forms | Federal | Financial Institution Bad Debt | Bad Debts Summary | Addition to Reserves for Bad Debts | Savings and Loans Tax Forms | Federal | Financial Institution Bad Debt | Bad Debts Summary | Recapture of Reserves | Four-year spread of adjustments under Section 585(c) Tax Forms | Federal | Financial Institution Bad Debt | Bad Debts Summary | Bad Debts under Section 166 | Deduction by large banks under the elective cutoff method... Organizer | Income and Deductions | Deductions | Financial Institution Bad Debts | Reserve\Specific C-O | Reserve Method | Trade Notes and Account Receivable...column | upper-left field Organizer | Income and Deductions | Deductions | Financial Institution Bad Debts | Reserve\Specific C-O | Alternative Specific Charge-Off Method | Total current year deduction of business bad debts...

FinCEN Form 114: Report of Foreign Bank and Financial Accounts

not a top consolidated return + not a division within a divisional consolidation + Organizer | General Information | Return and Print Options | Pg 1-5 Options | Page 1 Schedules | Bad debts is NOT selected +

FinCEN Form 114a: Record of Authorization to Electronically File FBARs

at lease one of the following fields has data:

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 1042-S	Recipient entered on Organizer Informational Forms Withholding for Foreign Persons Recipient
Form 1118: Foreign Tax Credit - Corporations: Schedule A-G	If no suppression at Organizer Foreign Information Foreign Tax Credit Print Options Form Suppression then at Tax Forms Federal 1118 - Foreign Tax Credit Category of Income Schedules A through G and I, amounts must be present on (Schedule A Line 12 OR Schedule A Line 17 OR Schedule B Part II Line 1a) AND on Schedule B Part III Line 7. If there is no amount for Schedule B Part III Line 7 and client wants to print Schedules A and B, 'NONE' may be entered on Line 7. Schedule B, Part I, Date Paid or Date Accrued checkbox will default to accrued if an accrued date is entered.
Form 1118: Foreign Tax Credit - Corporations: Schedule H	Verify no Schedule H suppression at Organizer Foreign Information Foreign Tax Credit Print Options Form Print Suppression. Verify Tax Forms Federal 1118 - Foreign Tax Credit Category of Income Schedules A through G and I, amounts must be present on (Schedule A Line 12 OR Schedule A Line 17 OR Schedule B Part II Line 1a) and Schedule B, Part III, Line 7. To print Schedule H Part I, RE Deduction in column (iii) must calculate. If no calculation, enter NONE at Organizer Foreign Information Foreign Tax Credit Schedule H Schedule H Part I SIC Code assigned Schedule H, Part I, Totals, Total line, column RE Deductions. To print Schedule H Part II, at least one basket must have calculation(s) in Part II column (f). To print Schedule H Part III, there must be an apportionment amount reported on Part III Line 1.
Form 1118: Foreign Tax Credit - Corporations: Schedule I: Reduction of Foreign Oil and Gas Taxes	If no suppression at Organizer Foreign Information Foreign Tax Credit Print Options Form Suppression then at Tax Forms Federal 1118 - Foreign Tax Credit Category of Income Schedules A through G and I, amounts must be present on (Schedule A Line 12 OR Schedule A Line 17 OR Schedule B Part II Line 1a) AND amount on Total at Schedule I, Pg1, Col 11
Form 1118: Foreign Tax Credit - Corporations: Schedule J: Adjustments to Separate Limitation Income (Loss) Categories	If no suppression at Organizer Foreign Information Foreign Tax Credit Print Options Form Suppression then at Tax Forms Federal 1118 - Foreign Tax Credit Category of Income Schedules A through G and I, amounts must be present on Schedule A Line 17 AND Schedule B Part III Line 7.
Form 1118: Foreign Tax Credit - Corporations: Schedule K: Foreign Tax Carryover Reconciliation Schedule	If no suppression at Organizer Foreign Information Foreign Tax Credit Print Options Form Suppression then at Tax Forms Federal 1118 - Foreign Tax Credit Category of Income Schedules A through G and I, amounts must be present on Schedule B Part III Line 7 AND amount on Schedule K, Page 2, Line 8 total reported at column (xiv).
Form 1118: Foreign Tax Credit - Corporations: Schedule L: Foreign Tax Redeterminations	If no suppression at Organizer Foreign Information Foreign Tax Credit Print Options Form Suppression and relation back year exists at Organizer Foreign Information Foreign Tax Credit Schedule L Category, then Schedule L will print pages 1-3 by category for the listed relation back year(s). Parts I and II require a payor name to include details.
Form 1120: U. S. Corporation Income Tax Return	Return type is 1120 - U.S. Corporation in Organizer General Information Basic Return Information Entity Information
Form 1120-C: Farmers' Cooperatives Income Tax Return	Return type is 1120-C - Cooperative Associations in Organizer General Information Basic Return Information Entity Information + It is not a mixed group consolidation

Form 1120-F: U.S. Income Tax Return of a Foreign Corporation	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + To print pages 3-8, the check box cannot be selected in Organizer Income and Deductions Sec I - Income Not Connected Section I Income.
Form 1120-H: Homeowner's Association Income Tax Return	Return type is 1120-H Homeowners Association in Organizer General Information Basic Return Information Entity Information
Form 1120-L: U.S. Life Insurance Company Income Tax Return	Automatically if entity type is 1120L and not LifeNonLife nor NonLifeTop or Life Sub group. Organizer General Information Basic Return Information Entity Information. OR Organizer General Information Basic Return Information Return/Entity Type Conversion.
Form 1120-PC: Property and Casualty Insurance Company Income Tax Return	Return type is 1120-PC or Failed Life in Organizer General Information Basic Return Information Entity Information Form 1120-PC, Page 2 Compute taxable investment income per Schedule B is not selected in Organizer General Information 1120-PC Options Compute Options Form 1120-PC, Page 3 Compute taxable investment income per Schedule B is selected in Organizer General Information 1120-PC Options Compute Options
Form 1120-REIT: U.S. Income Tax Return for Real Estate Investment Trusts	Print for 1120-REIT return type only Organizer General Information Basic Return Information Entity Information
Form 1120-RIC: U.S. Income Tax Return for Regulated Investment Company	Print for 1120-RIC return type only Organizer General Information Basic Return Information Entity Information
Form 1120S: U.S. Income Tax Return for an S Corporation	The return is marked as 1120 - S Corporation in the Organizer General Information Basic Return Information Entity Information.
Form 1120X: Amended U.S. Corporation Income Tax Return	The return is marked as 1120 - US Corporation in the Organizer General Information Basic Return Information Entity Information. + Amended Return is marked in Organizer General Information Basic Return Information Return Information. +Line 10 Tax Due or Line 11 Overpayment has data on 1120X OR The following option has been selected in Organizer Amended Return Options, Check the box to force print.
Form 1122: Authorization and Consent of Subsidiary Corporation to be Included in a Consolidated Income Tax Return	Top Consolidation is marked in the Organizer General Information Basic Return Information Entity Information. + One of the following has to be Yes: Print Form 1122 for every member of the consolidation in the Organizer Informational Forms Authorization to be Included Parent Information OR At least one subsidiary is marked to Print 1122 for this company only in the Organizer Informational Forms Authorization to be Included Subsidiary Information
Form 1125-A: Cost of Goods Sold	Form 1125-A, line 6 or line 7 has a value + Return type is 1120, or 1120-C, or 1120-F, or 1120S Organizer General Information Basic Return Information Entity Information + Option to suppress print of Form 1125-A is not selected in Organizer Income and Deductions COGS/COOPS OR Force print option is selected in Organizer Income and Deductions COGS/COOPS

Form 1125-E: Compensation of Officers	Detail is entered for Officer(s) + Return type is 1120, or 1120-C, or 1120-F, or 1120-REIT, or 1120-RIC, or 1120S in Organizer General Information Basic Return Information Entity Information + Suppress Form 1125-E option is not selected in Organizer Income and Deductions Deductions Officers Compensation Summary of Officers Comp OR Force print Form 1125-E option is selected in Organizer Income and Deductions Deductions Officers Compensation Summary of Officers Comp
Form 1138: Extension of Time for Payment of Taxes by a Corporation Expecting a Net Operating Loss Carryback	Option to suppress under Organizer Payments and Extension 1138 Basic Data - under the Print Option - to suppress the printing of Form 1138 - is not checked + There is a value on the Form 1138, line 2 " Amount of expected NOL
Form 1139: Corporation Application for Tentative Refund	Form 1139, line 1a or line 1b or line 1c or line 1d has a value + Line 16 has a value for one of the carryback years
Form 2220: Underpayment of Estimated Tax by Corporation	The main return has an "X" indicating the 2220 has been attached.
Form 2438: RIC Undistributed Capital Gains Tax	Print for 1120 REIT/RIC return type only + Field has data + Tax form line 17(Capital gains tax) must have data to trigger print
Form 2439: RIC Notice to Shareholders	Print for 1120 REIT/RIC return type only + Not suppress to print Organizer General Information Return and Print Options Tax Form Options
Form 2553: Election by a Small Business Corporation	Print when the project is released and Organizer Informational Forms Election by a Small Business Corporation General Information + Check Force print of Form 2553. must use selective print
Form 2848: Power of Attorney and Declaration of Representative	A Representative is entered in Organizer Informational Forms Power of Attorney Representative Information + The form is not suppressed in Organizer Informational Forms Power of Attorney General Information Suppress print
Form 3115: Change in Accounting Method	The form has been created under "Organizer Informational Forms Change in Accounting Method" and not suppressed. Suppression option is per 3115 and is found here: Organizer Informational Forms Change in Accounting Method <name> General Information Print Options. The form does not consolidate but will print from the top con.
Form 3468 - Investment Credit	
Form 3800: General Business Credit	Data is entered for any credit that flows to Form 3800 on "Organizer Credits," "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref, OR "Organizer Credits Passive Activity Credits OR "Organizer Credits General Business Credit Carryforward of Unused Credits GBC Carryforward Information," OR "Organizer Credits General Business Credit Carryforward of Unused Credits ESBC Carryforward Information" Note that top con data entry or typing directly on the tax form without organizer entries will produce e-file rejects, and the form will not print.
Form 4136: Credit for Federal Tax Paid on Fuels	Data has been entered on "Organizer Credits Federal Tax Paid on Fuels Federal Tax Paid on Fuels"

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 4466: Corporation Application for Quick Refund of Overpayment of Estimated Tax	An amount exists at Tax Forms 4466 - Quick Refund of Overpayment + The following option is not selected: Organizer Estimates and Penalties 4466 Quick Refunds Suppress print of Form 4466
Form 4562: Depreciation and Amortization	At least one amount must be present on line 8, 9, 10, 22, or 44 to trigger any Form 4562 print. Summary Form 4562 * Form prints if more than one activity has Form 4562 triggered or if the activity triggered is a rental or pass-through and no other activity has depreciation. Activity Form 4562 * Form prints for each activity in a non-consolidated entity return. * Form prints once with consolidated totals for a consolidated entity if the option in Organizer General Information Return and Print Options Depreciation Options Print Options for Consolidated Companies hyperlink to Print Form 4562 for each activity in the consolidated group is not checked. * Form prints for each activity in the consolidated group instead of a consolidated Form 4562 if the option to Print Form 4562 for each activity in the consolidated group is checked. State Not Adopting Expanded Section 179 or Special Depreciation Form 4562 * Form prints with the federal return if other Form 4562 print conditions are met and the option in Organizer General Information Return and Print Options Depreciation Options Print with Federal Return for States that do NOT adopt Special Depreciation for Pre-Spec Depr Form 4562 is checked. State Adopts Expanded Section 179 but not Special Depreciation Form 4562 * Form prints with the federal return if other Form 4562 print conditions are met and the option in Organizer General Information Return and Print Options Depreciation Options Print with Federal Return for States that do NOT adopt Special Depreciation for Adopting IRC § 179 Form 4562 is checked.
Form 4626: Alternative Minimum Tax—Corporations	
Form 4684: Casualties and Thefts	Data is entered on "Organizer Gains and Losses Disposition of Property Disposition Detail Create Dispositions of Property" and the disposition type selected is 4684. The form will print if any of the following are Yes: 1) The sum of lines 30, 31, 38a, 38b, and 39 exists; 2) deferred gain exists for one or more transactions; 3) at least one 4684 transaction has been created with a valid property type. The form consolidates the totals, but transactional detail is only visible in print preview. In 1120S, the detail consolidates.
Form 4797: Sales of Business Property	Data is entered on "Organizer Gains and Losses Disposition of Property Disposition Detail Create Dispositions of Property" with the disposition type 4797 OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity activity Pass-Through Entity Income/Deductions". The form will print if data exists on line 7, line 17, line 35a, or line 35b. The form consolidates the totals, but transactional detail is only visible in print preview. In 1120S, the detail consolidates.
Form 5452: Corporate Report of Nondividend Distributions	Answer yes/no question A on form

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
Corporations

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

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	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
Form 5472: Information Return of a 25% Foreign Owned Corporation or a Foreign Corporation Engaged in a U.S. Trade or Business	Suppress all is not checked on Tax Forms 5472 - Foreign Owned Corporation Summary + Suppress is not check for the related party on Tax Forms 5472 - Foreign Owned Corporation Summary + Related Party entered + (suppress the printing of ALL 5472s without monetary transactions checked on Forms 5472 - Foreign Owned Corporation Summary AND Amounts on any of lines 1-12 AND Amounts any of lines 14-25) OR (Part 1, Line 1a is not blank AND suppress the printing of ALL 5472s without monetary transactions checked on Forms 5472 - Foreign Owned Corporation Summary is blank)
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	"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	"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 5735: Possessions Corporation Tax Credit Allowed Under Section 936 and 30A	Tax Forms Form 5735, line 1 must have data.
Form 5884: Work Opportunity Credit	Data has been entered on "Organizer Credits Work Opportunity Credit OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR "Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 6198: At-Risk Limitations	Form 6198, line 21 has a value OR Option to Generate Form 6198 is selected in Organizer Income and Deductions Passive, Rental, and At-Risk New Passive Activity Information Passive/Rental Act OR Option to Generate Form 6198 is selected in Organizer Income and Deductions Farm Income and Expense New Farm Activity Information Farm Information

Form 6252: Installment Sale Income	Data is entered on Organizer Gains and Losses Disposition of Property Disposition Detail Create Dispositions of Property + The disposition type selected is 6252. The form will print if lines 1, 2b, 14, and 19 have data. The form consolidates the totals to flow to other forms, but the form and detail are only visible in print preview. In 1120S, the detail consolidates.
Form 6478: Alcohol and Cellulosic Biofuel Fuels Credit	Data has been entered on "Organizer Credits Biofuel Producer Credit, OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR "Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 6765 - Credit for Increasing Research Activities	Data has been entered on "Organizer Credits Credit for Increasing Research Credit for Increasing Research, OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR "Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options 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	Data is entered on "Organizer Gains and Losses Contracts and Straddles OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity activity Pass-Through Entity Income/Deductions". The form will print if data exists on line 5, line 10, or line 12. The form consolidates the totals, but transactional detail is only visible in print preview. In 1120S, the detail consolidates.
Form 7004: Application for Automatic Extension of Time to File Corporation Income Tax Return	An option must be selected other than "Do not print (Default)" at Organizer Payments and Extension Automatic Extensions 7004 Basic Data Federal Extension Options (Mandatory) + The form must not be suppressed at Organizer Payments and Extension Automatic Extensions 7004 Basic Data Suppression Options section Suppress Form 7004 checkbox
Form 7205: Energy Efficient Commercial Buildings Deduction	
Form 7207: Advanced Manufacturing Credit	
Form 7210: Clean Hydrogen Production Credit	
Form 7211 - New form 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 7218 - New form 2024 applies to tax years ending in 2025 - Release status shown at Organizer | Credits | Tax Year 2024 Updates and Changes

Form 8023: Corporate Qualified Stock Purchase Elections	Election Under Section 338 data must be entered on Organizer Informational Forms Election Under Section 338 + Form 8023, Page 1, Line 2a (Name of common parent of purchasing corporation) OR Line 3a (Name of target corporation) OR Line 4a (Name of common parent of the selling affiliate, U.S. shareholder(s) of foreign target corporation, or S corporation shareholder(s))
Form 8050: Direct Deposit of Corporate Tax Refund	Return type is 1120 or 1120S + The following option is not selected: Organizer Taxes Direct Deposit of Corp. Refund Suppress print of Form 8050 + Data is entered at Tax Forms 8050-Direct Deposit of Corp. Refund 1. Routing number OR The following option is selected: Organizer Taxes Direct Deposit of Corp. Refund Print Form 8050 without bank account information
Form 8082: Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)	Part 1, line 4 must be populated
Form 8275: Disclosure Statement	Enter Disclosure Description and Disclosure type "Disclosure" in Organizer Informational Forms Disclosure Statement
Form 8275R: Regulation Disclosure Statement	Enter Disclosure Description and Disclosure type "Regulation Disclosure " in Organizer Informational Forms Disclosure Statement
Form 8283: Noncash Charitable Contributions	Page 1 If NonCash Charitable Contribution exist Organizer Informational Forms Noncash Contributions Noncash Charitable Contributions. Page 2 Organizer Informational Forms Noncash Contributions y Contributions over \$5,000 dd Section B, Property Info
Form 8302 (1120-F): Electronic Deposit of Tax Refund of \$1 Million or More	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + A bank name needs to be entered in Organizer Taxes Direct Deposit of Tax Refund.
Form 8453-CORP: E-file Declaration for Corporations	Form 8453-CORP replaces 8453-C, 8453-I, and 8453-S beginning in tax year 2022. E-file signature option is Form 8453 in Organizer Federal E-file Signature Authorization + Return is for a taxable entity (single or top consolidation)
Form 851: Affiliations Schedule	A Top Consolidated return + Form 851 is not suppressed in the Organizer Consolidated Returns Step 3 - Select Print and Calculation Form Print Options + The return is not marked to consolidate divisions to a single company in the Organizer Consolidated Returns Step 3 - Select Print and Calculation Divisional Consolidation
Form 8586: Low Income Housing Credit	Data has been entered on "Organizer Credits Low-Income Housing Credit Low-Income Housing Credit Low-Income Housing Credit, OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR "Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options

Form 8594: Asset Acquisition Statement	Name of Other Party to Transaction, Part 1, line 1 must be present +Not suppressed
Form 8609: Low-Income Housing Credit Allocation and Certification	Print option must be selected on "Organizer Credits Low-Income Housing Credit Low-Income Housing Credit <project name> <building name> Allocation and Certification"
Form 8609-A: Annual Statement for Low-Income Housing Credit	Form will print if all mandatory options are completed on "Organizer Credits Low-Income Housing Credit Low-Income Housing Credit <project name> <building name> Annual Statement"
Form 8611: Recapture of Low-Income Housing Credit	Data has been entered on "Organizer Credits Low-Income Housing Credit Recapture Low-Income Credit"
Form 8612: Return of Excise Tax on Undistributed Income of REITs	One of the following lines must have data: Line 9 OR Line 4
Form 8613: Return of Excise Tax on Undistributed Income of RICs	One of the following lines must have data: Line 2B OR Line 4 OR Line 7c OR Line 9
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 OR 15e OR 15f OR 16b OR 16c OR 16e OR 17
Form 8621-A: Return by a Shareholder Making Certain Late Elections to End Treatment as a Passive Foreign Investment Company	Name of former passive foreign investment company must have data
Form 8697: Interest Computation under the Look Back Method for Completed Long Term Contracts	Option to suppress is not selected under Organizer Income and Deductions Look Back Int for Contracts General Information - Suppress Form 8697 for print and e-file purposes + Has to have one of the following entered: Name of Pass-through entity has to exist under Organizer Income and Deductions Look Back Int for Contracts Pass-through Entities pass through - pass through entity name OR Prior year end to which interest computations relate and select the Mandatory first selection box choose the "filing year" for the first entry "filing year" entries under Organizer Income and Deductions Look Back Int for Contracts Regular Method Contracts 01/01/2015 Regular Method Contracts OR Prior year end to which interest computations relate under Organizer Income and Deductions Look-Back Int for Contracts Year - Simplified Method.
Form 8716: Election to Have a Tax Year Other than a Required Tax Year	Tax Form Form 8716 line 3 must has data OR line 4 must has data OR line 5 (Adopting OR Retaining OR Changing to checked)
Form 8752: Required Payment or Refund under Section 7519	Organizer Taxes Required Payment or Refund Under 7519 Entity's first year is check OR Tax Forms Federal 8752-Required Payment or Refund line 11 or 12 have amount

Form 8816: Special Loss Discount Account and Special Estimated Tax Payments for Insurance Companies	Tax Forms Form 8816 Accident Year fields must have data.
Form 8819: Dollar Election under Section 985	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + One of the options is selected for Form 8819, lines 1a or 1b in Tax Forms Federal 8819 - Dollar Election Under Sec 985. + The form is not suppressed in Organizer Foreign Information Dollar Election General Information
Form 8820: Orphan Drug Credit	Data has been entered on "Organizer Credits Orphan Drug Credit, OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8821: Tax Information Authorization	Organizer Informational Forms Tax Information Authorization, "X to prepare 8821" check box must be checked.
Form 8822: Change of Address	Organizer Informational Forms Change of address, "Force print" field must be checked.
Form 8824: Like-Kind Exchanges	Data has been entered on "Organizer Gains and Losses Like-Kind Exchanges + The mandatory entries (type of property and description of like-kind property given up) have been completed. The form consolidates the totals to flow to other forms, but the form and detail are only visible in print preview. In 1120S, the detail consolidates.
Form 8825: Rental Real Estate Income and Expense of a Partnership or an S Corporation	Organizer Income and Deductions Rental Activity rental 01 Activity Information Rental Activities have at least one activity added + Type of activity selected as Rental Real estate + Line 18a have amount
Form 8826: Disabled Access Credit	Data has been entered on "Organizer Credits Disabled Access Credit OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8827: Credit for Prior Year Minimum Tax	Data has been entered on "Organizer Credits Prior Year Minimum Tax"
Form 8830: Enhanced Oil Recovery Credit	
Form 8832: Entity Classification Election	Entity Classification Election Name must be entered on Organizer Informational Forms Entity Classification Election + Form 8832, Page 1, Part I, Line 1a OR Form 8832, Page 1, Part I, Line 1b OR Form 8832, Page 2, Part I, Line 8 must have data.

Form 8833: Treaty-Based Return Position Disclosure	Suppress printing of Form 8833 is not selected in Organizer Foreign Information Treaty Based Position + Treaty based return position disclosure - mandatory entries must be made for Treaty country and Article(s) in Organizer Foreign Information Treaty Based Position
Form 8834: Qualified Electric and Plug-In Electric Drive Vehicle Credit	Data has been entered on "Organizer Credits Qualified Electric Vehicle Credit Qualified Electric Vehicle Credit"
Form 8835: Renewable Electricity Production Credit	
Form 8838: Consent to Extend the Time to Assess Tax Under Section 367 - Gain Recognition Agreement	Line 1 completed
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 Period for Corporate Estimated Tax	The return must not be marked final + Form 8842 is not suppressed at Organizer General Information Return and Print Options "Tax Form Options" tab "Form 8842" section + One of the following has to be Yes: (Optional method #1 must be selected at Organizer Estimates and Penalties Annualization Options "Annualization period" box OR Optional method #2 must be selected at Organizer Estimates and Penalties Annualization Options "Annualization period" box)
Form 8844: Empowerment Zone Employment Credit	Data has been entered on "Organizer Credits Empowerment Zone Credit, OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
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 Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8848 (1120-F): Consent to Extend the Time to Assess the Branch Profits Tax	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + The check box for item A or B needs to be populated in Tax Forms Federal 8848 - Extension to Assess Branch Profits.

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: Transactions between Foreign Disregarded Entity of a Foreign Tax Owner	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 Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR "Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
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" 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 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, Deductions, Credits, 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 + The 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 + 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

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. 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 8865: Schedule P:
Acquisitions, Dispositions,
and Changes of Interests in a
Foreign Partnership

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 | <name> | Acquisitions, Dispositions, and Changes 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 8866: Interest
Computation Under the Look-
Back Method for Property
Depreciated under the
Income Forecast Method

Option to suppress is not selected at Organizer | Income and Deductions | Look Back Int for Property | General Information | "Print Suppression" section | Suppress Form 8866 for print and e-file purposes + One of the following must be entered: (Name of Pass-through entity has to exist at Organizer | Income and Deductions | Look Back Int for Property | Pass-through Entities | Pass-through entity name OR A date entered on line "Prior year end to which interest computations relate" at Organizer | Income and Deductions | Look Back Int for Property | Income Forecast Method | {Date} | Income Forecast Method)

Form 8873: Extraterritorial
Income Exclusion

Return type is 1120-F in Organizer | General Information | Basic Return Information | Entity Information. + The form cannot be marked as suppressed in Tax Forms | 8873 - Extraterritorial Income Exclusion | 8873 Exclusion Summary. + A product line needs to be entered in Organizer | Foreign Information | Extraterritorial Income | Product Line. + A basis of reporting needs to be selected in Organizer | Foreign Information | Extraterritorial Income | Mandatory - Basis of Reporting. + (The entity type is single, parent, subsidiary, division, insurance single, insurance parent, insurance subsidiary, insurance division. OR The entity type is top con, sub con, insurance top, insurance life-nonlife top, property and casualty subcon, Health Annual insurance subcon, or Title Annual insurance subcon)

Form 8874: New Markets Tax
Credit

Data has been entered on "Organizer | Credits | New Markets Credit | New Markets Credit, OR "Organizer | Income and Deductions | Pass-Through Entity | Pass-Through Entity | <name> | Pass-Through Entity | Credits/Tax Pref OR "Organizer | Credits | Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer | Credits | General Business Credit | Print and Compute Options

Form 8875: Taxable REIT Sub Election	Part 1 must have name of taxable REIT subsidiary
Form 8878-A: IRS E-file Electronic Funds Withdrawal Authorization for Form 7004	The "Authorization to debit funds" checkbox must be checked at Organizer General Information Bank Information "Extension" tab "Direct Debit (Electronic Funds Withdrawal)" section + The Federal E-file Extension must be enabled at Organizer Federal E-file Extension Enable Extension Enable federal extension e-file checkbox + An option must be selected other than "Do not print (Default)" at Organizer Payments and Extension Automatic Extensions 7004 Basic Data Compute option (Mandatory) + There must be an amount or "NONE" on 7004, Page 2, Part V, Line 8
Form 8879-CORP: E-file Authorization for Corporations	Form 8879-CORP replaces 8879-C, 8879-I, and 8879-S beginning in tax year 2022. E-file signature option is Form 8879 in Organizer Federal E-file Signature Authorization + Return is for a taxable entity (single or top consolidation)
Form 8881: Credit for Small Employer Pension Plan	Data has been entered on "Organizer Credits Credit for Employer Startup Cost OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8882: Credit for Employer Provided Child Care Facilities and Services	Data has been entered on "Organizer Credits Credit for Childcare Facilities, OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8883: Asset Allocation Statement Under Section 338	Asset Allocation Statement description must be entered on Organizer Informational Forms Asset Allocation Statement + Form 8883 Part I line 1c either Old Target OR New Target checked OR part IV, Line 4a must has data.
Form 8886: Reportable Transaction Disclosure Statement	Name of reportable transaction, line 1a must be present
Form 8896: Low Sulfur Diesel Fuel Production Credit	Data has been entered on "Organizer Credits Low Sulfur Diesel Fuel Credit, OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8900: Qualified Railroad Track Maintenance Credit	Data has been entered on "Organizer Credits Qualified Railroad Track Credit Qualified Railroad Track Credit, OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options

Form 8902: Alternative Tax on Qualified Shipping	An amount is entered at Tax Forms 8902-Alt Tax Qual Ship Act Page 2 Line 30
Form 8903: Domestic Production Activities Deduction	Form 8903, line 10b, or line 18, or line 23, or line 24, or line 25 has a value + Return type is not 1120S, or 1120-RIC, or 1120-REIT, or 1120H in Organizer General Information Basic Return Information Entity Information + Return is not for a failed life insurance company + Option to suppress print of Form 8903 is not selected in Organizer Income and Deductions Deductions Domestic Production Activities Ded Domestic Production Activities Ded OR Option to force print Form 8903 is selected in Organizer Income and Deductions Deductions Domestic Production Activities Ded Domestic Production Activities Ded
Form 8904: Credit for Oil and Gas Production From Marginal Wells	Data has been entered on "Organizer Credits Production From Marginal Wells, OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8906: Distilled Spirits Credit	Data has been entered on "Organizer Credits Distilled Spirits Credit, OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8908: Energy Efficient Home Credit	Data has been entered on "Organizer Credits Energy Efficient Home Credit, OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
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 Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Activity Information"
Form 8916: Reconciliation of Schedule M-3 Taxable Income with Tax Return Taxable Income for Mixed Groups	Tax Forms Form 8916 line 1 or line 8 must have data.

Form 8916-A: Reconciliation of Cost of Goods Sold Reported on Schedule M-3	Form 8916-A, part I, line 8, or part II, line 6, or part III, line 5 has a value in any column + Option to suppress Form 8916-A is not selected in Organizer Balance Sheet/M1-M2 -M3 Supplemental Attachment to M-3 Form 8916-A + Option to not Complete Schedule M-3, Parts II and III is not selected under General Options in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options OR Option to force print Form 8916-A is selected in Organizer Balance Sheet/M1-M2 -M3 Supplemental Attachment to M-3 Form 8916-A
Form 8925: Report of Employer-Owned Life Insurance Contracts	+ Name of policyholder exists on form or Line 1 on form has a value
Form 8932: Credit for Employer Differential Wage Payments	Data has been entered on "Organizer Credits Employer Diff Wage Pmt Credit OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
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 8938: Statement of Specified Foreign Financial Assets	Total value of those assets exceeds \$50,000
Form 8941: Credit for Small Employer Health Insurance Premiums	Data has been entered on "Organizer Credits Small Employer Ins Premium OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8949: Sales and Other Dispositions of Capital Assets	Data has been entered on "Organizer Gains and Losses Capital Gains and Losses Capital Assets Sale Detail OR "Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref OR Organizer Credits Passive Activity Credits If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options

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 + The mandatory entry for the initial reporting period has been marked on "Organizer | Credits | Credit for Increasing Research | Small Business Payroll Tax The form only prints through Selected Federal Forms, because it is not an income tax form and can't 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. The form is only valid in top con and single company returns. It does not apply to 1120-Coop, 1120-F, 1120H, 1120RIC, or 1120DISC.

Form 8978, Schedule A: Partner's Additional Report Year Tax (Schedule of Adjustments)

Form 8978: Partner's Additional Reporting Year Tax

Form 8985 - Pass-Through statement - Transmittal / Partnership Adjustment Tracking Report

S Corp Name

Form 8985-V - Tax Payment by a Pass-Through Partner

Amount paying with Form 8985

Form 8986 - Partner's Share of Adjustment(s) to Partnership-Related Item(s)

If the Form is completed.

Form 8990: Limitation on Business Interest Expense IRC 163(j)

Form 8991: Tax on Base Erosion Payments of Taxpayers with Substantial Gross Receipts

Form 8992: US Shareholder Calculation of Global Intangible Low-Taxes Income (GILTI)

Form 8993: Section 250 Deduction for Foreign-Derived Intangible Income (FDII) and Global Intangible Low-Taxed Income (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 Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Credits/Tax Pref" OR "Organizer Credits Passive Activity Credits" If the return is not 1120S and the only data entry is for pass-through or passive credits, the form will not print if the option to suppress the source credit is marked on "Organizer Credits General Business Credit Print and Compute Options
Form 8996: Qualified Opportunity Fund	
Form 8997: Initial and Annual Statement of Qualified Opportunity Fund (QOF) Investments	
Form 926: Return by a U.S. Transferor of Property to a Foreign Corporation	Property entered on Organizer Informational Forms U.S. Property Transfer to Foreign Corp + Line 8 common or preferred shares exist on form OR Line 4 date adopted exist on form OR Suppress printing of Form 966 is not selected in Organizer Informational Forms Dissolution or Liquidation + Will not print from an entity type division in Organizer General Information Basic Return I Information
Form 965-B: Corporate and Real Estate Investment Trust (REIT) Report of Net 965 Tax Liability and Electing REIT Report of 965 Amounts	Available on a future release
Form 966: Corporate Dissolution or Liquidation	+ Line 8 common or preferred shares exist on form OR Line 4 date adopted exist on form OR Suppress printing of Form 966 is not selected in Organizer Informational Forms Dissolution or Liquidation + Will not print from an entity type division in Organizer General Information Basic Return I Information
Form 970: Application to Use LIFO Inventory Method	Activate Form 970 on Organizer Informational Forms Application to use LIFO Method Part I tab + Form 970 Page 1, Part I, Line 1
Form 972: Consent of Shareholder to Include Specific Amount in Gross Income	Only print for 1120REIT/RIC/Personal holding Co. Must have shareholder entered under Organizer Informational Forms Consent Dividend Stock Information-972
Form 973: Corporation Claim for Deduction for Consent Dividends	Only print for 1120REIT/RIC/Personal holding Co. Must have shareholder entered under Organizer Informational Forms Consent Dividend Stock Information-973
Form 982: Reduction of Tax Attributes Due to Discharge of Indebtedness	(Tax form Form 982 Part I, Line 1a OR Line 1b OR Line 1c OR Line 1d OR Line 1e) OR Part III Under section 1081 (b), the corporation named above has excluded amount.
Form T: Forest Industries 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. The form does not consolidate but will print from the top con.
Schedule B: Additional Information for Schedule M-3 Filers	1120 Schedule M-3 is filed + It is a taxable entity (single company or top consolidation) return

Schedule B-1 (1120S): Information on Certain Shareholders of an S Corporation	Organizer Shareholder Information Shareholder Data Shareholder Information shareholder 1 Shareholder Information + Schedule B-1 have data and checkbox + Question 3 need to be Yes under Organizer General Information Questions Schedule B
Schedule D (1120): Capital Gains and Losses	Data is entered on "Organizer Gains and Losses Capital Gains and Losses Other Information Capital Loss Carryovers OR Organizer Gains and Losses Capital Gains and Losses Other Information Capital Gain Distributions OR Organizer Gains and Losses Capital Gains and Losses Capital Assets Sale Detail OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Income/Deductions Data can also flow from 8949, 6252, 8824, and 4797. The form consolidates the totals, but transactional detail is only visible in print preview. In 1120S, the detail consolidates.
Schedule D (1120S): Capital Gains and Losses and Built-In Gains	Data is entered on "Organizer Gains and Losses Capital Gains and Losses Other Information Capital Loss Carryovers OR Organizer Gains and Losses Capital Gains and Losses Other Information Capital Gain Distributions OR Organizer Gains and Losses Capital Gains and Losses Capital Assets Sale Detail OR Organizer Income and Deductions Pass-Through Entity Pass-Through Entity <name> Pass-Through Entity Income/Deductions" Data can also flow from 8949, 6252, 8824, and 4797. The form consolidates the totals, but transactional detail is only visible in print preview. In 1120S, the detail consolidates Tax Forms Federal Sch D/8949-Capital Gains and Losses Schedule D-Capital Gains and Losses Schedule D, Page 1 line 7 have amount or line 15 have amount
Schedule F (1040): Profit or Loss from Farming	There needs to be a farm name in Tax Forms Federal Farm Schedule Farm Summary. + There needs to be amounts and a total in Tax Forms Federal Farm Schedule Farm Summary.
Schedule G: Information for Certain Persons Owning the Corporation's Voting Stock	Return type is 1120 in Organizer General Information Basic Return Information Entity Information + Schedule K, question 4a or 4b is answered 'Yes' + Detail is entered for the 'Yes' answer
Schedule H (1120-F): Expenses Allocated to Effectively Connected Income Under Regulation Section 1.861-8	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + (The check box for US dollars selected in Tax Forms Federal 1120-F Foreign Corp. Income Tax Ret. Schedule H Page 1, Part I. OR The currency needs to be specified in Tax Forms Federal 1120-F Foreign Corp. Income Tax Ret. Schedule H Page 1, Part I. OR There needs to be an amount in Tax Forms Federal 1120-F Foreign Corp. Income Tax Ret. Schedule H Page 2, Part IV, line 29.)
Schedule H: Section 280H Limitations for a Personal Service Corporation (PSC)	Return type is 1120 in Organizer General Information Basic Return Information Entity Information + Has data on line 14 + The Form is not suppressed in Organizer Income and Deductions Schedule H Limitation for PSC Section 280H Limitation for PCS Print Option
Schedule I (1120-F): Interest Expense Allocation Under Reg. 1.882-5	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + An option needs to be selected for item B in Tax Forms Federal 1120-F - Foreign Corp. Income Tax Ret Schedule I Page 1 item B.
Schedule K-1	

Schedule K-1 (1120S): Shareholder's Share of Income, Credits, Deductions, etc.	Organizer Shareholder Information Shareholder Data Shareholder Information shareholder 1 Shareholder Information have at least 1 shareholder and (have beginning number of shares or have ownership percentage for tax year)
Schedule M-1/M-2 (1120-F): Reconciliation of Income (Loss) and Analysis of Unappropriated Retained Earnings per Books	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + (There is an amount on Tax Forms Federal 1120-F - Foreign Corp. Income Tax Ret Schedules M1, M2 Schedule M-1, line 10. OR There is an amount on Tax Forms Federal 1120-F - Foreign Corp. Income Tax Ret Schedules M1, M2 Schedule M-2, line 8.) + The check box cannot be selected in Organizer Income and Deductions Sec I - Income Not Connected Section I. + Print is not suppressed in Organizer Balance Sheet/M1-M2-M3 Schedule M-1 / M-2 Schedules M1, M2, M3 Options tab.
Schedule M-3 (1120): Net Income (Loss) Reconciliation for Corporations with Total Assets of \$10 Million or More	Return type is either 1120 in Organizer General Information Basic Return Information Entity Information + Option to indicate Dormant or Inactive Corporation is not selected in the General Options section in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options + Compute option is either Compute Sch M-3 only or Compute both Sch M-1 and Sch M-3 M-3 in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options OR Compute option is Compute Sch M-1 or Sch M-3 based on the total assets at the end of tax year in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options and the ending assets are equal to or greater than \$10 million
Schedule M-3 (1120-C): Net Income (Loss) Reconciliation for Corporations with Total Assets of \$10 Million or More	Return type is 1120-C in Organizer General Information Basic Return Information Entity Information + Option to indicate Dormant or Inactive Corporation is not selected in the General Options section in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options + Compute option is either Compute Sch M-3 only or Compute both Sch M-1 and Sch M-3 M-3 in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options OR Compute option is Compute Sch M-1 or Sch M-3 based on the total assets at the end of tax year in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options and the ending assets are equal to or greater than \$10 million
Schedule M-3 (1120-F): Net Income (Loss) Reconciliation for Corporations with Total Assets of \$10 Million or More	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + Print is not suppressed in Organizer Balance Sheet/M1-M2-M3 Schedule M-1 / M-2 Schedules M1, M2, M3 Options tab. + Print is not suppressed in Organizer Balance Sheet/M1-M2-M3 Schedule M-1 / M-2 Schedules M1, M2, M3 Options tab Schedule M-3 Options hyperlink. + (Ending assets on Schedule L, line 17 need to be => \$10,000,000 in Tax Forms Federal 1120-F - Foreign Corp. Income Tax Ret Page 7 Schedule L, line 17, column d. OR The option to Force print Schedule M-3 needs to be selected in Organizer Balance Sheet/M1-M2-M3 Schedule M-1 / M-2 Schedules M1, M2, M3 Options tab Schedule M-3 Options hyperlink.)

Schedule M-3 (1120-L): Net Income (Loss) Reconciliation for Corporations with Total Assets of \$10 Million or More	Return type is either 1120:L in Organizer General Information Basic Return Information Entity Information + Option to indicate Dormant or Inactive Corporation is not selected in Organizer Life Electronic Organizer Page 7 Schedule M-3 Schedule M-3 Sch M-3 Options + Compute option is either Compute Sch M-3 only or Compute both Sch M-1 and Sch M-3 M-3 in Organizer Life Electronic Organizer Page 7 Schedule M-3 Schedule M-3 Sch M-3 Options OR Tax Forms Federal 1120-L - US Corporation Inc Tax Return 1120-L - US Corporation Inc Tax Return Page 7 Line 6 and the ending assets are equal to or greater than \$10 million
Schedule M-3 (1120-PC): Net Income (Loss) Reconciliation for Corporations with Total Assets of \$10 Million or More	Return type is 1120-PC or Failed Life in Organizer General Information Basic Return Information Entity Information + Option to indicate Dormant or Inactive Corporation is not selected in the General Options section in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options + Compute option is either Compute Sch M-3 only or Compute both Sch M-1 and Sch M-3 M-3 in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options OR Compute option is Compute Sch M-1 or Sch M-3 based on the total assets at the end of tax year in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options and the ending assets are equal to or greater than \$10 million
Schedule M-3 (1120S): Net Income (Loss) Reconciliation for Corporations with Total Assets of \$10 Million or More	Return type is 1120-s in Organizer General Information Basic Return Information Entity Information + Option to indicate Dormant or Inactive Corporation is not selected in the General Options section in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options + Compute option is either Compute Sch M-3 only or Compute both Sch M-1 and Sch M-3 M-3 in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options OR Compute option is Compute Sch M-1 or Sch M-3 based on the total assets at the end of tax year in Organizer Balance Sheet/M1-M2 -M3 Schedule M-3 Schedule M-3 Sch M-3 Options and the ending assets are equal to or greater than \$10 million
Schedule N: Foreign Operations of U.S. Corporations	(At least one question on Schedule N is Yes OR Force print is marked in Organizer General Information Questions Schedule N) + Not 1120 F or 1120 H in Organizer General Information Basic Return Information Entity Information.
Schedule O: Consent Plan and Apportionment for a Controlled Group	The return is marked in Organizer Taxes Consent Plan and Apportionment Sch Consent Plan and Apportionment Sch Taxpayer is a member of controlled group. + Members are entered in Organizer Taxes Consent Plan and Apportionment Sch Group Member Information.
Schedule P (1120-F): List of Foreign Partner Interests in Partnerships	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + A partnership name needs to be present in Tax Forms Federal 1120-F - Foreign Corp. Income Tax Ret Schedule P Page 1, Part I. * Returns with more than 4 partnerships will print the partnership details on whitepaper detail statements.
Schedule PCL	
Schedule PH: U.S. Personal Holding Company (PHC) Tax (Form 1120)	There is an amount on Line 26 PHC tax in Tax Forms Federal Sch PH - Personal Holding Company Tax Page 1. OR The following option has been selected in Organizer Taxes Personal Holding Company Income and Deductions Print Options Force to print Schedule PH.

Schedule S (1120-F): Exclusion of Income from the International Operation of Ship or Aircraft Under Section 883	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + A country code must be present in Tax Forms Federal 1120-F - Foreign Corp. Income Tax Ret Schedule S Page 1, Part I, line 1a.
Schedule UTP: Uncertain Tax Position Statement	Enter information in Organizer General Information Questions Schedule UTP.
Schedule V (1120-F): List of Vessels or Aircraft, Operators and Owners	Return type is 1120-F in Organizer General Information Basic Return Information Entity Information. + The name of the vessel or aircraft needs to be added in Organizer Income and Deductions Schedule V - List of Vessels, Aircraft Add new Vessel or Aircraft.
Section 199A (QBI) Unadjusted Basis for 2.5% Limitation	QBI is not disabled for the 1065 return, qualifying assets exist, and the option to print this form is selected on the Depreciation Compute and Print Options Organizer

Alabama

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

Form/Schedule

Requirement(s) to Print

Form 20C	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States State and City Activation State and City Activation Financial Return + The following option is not selected: Organizer States State and City Activation State and City Activation Entity Type Top Consolidation
Form 20C-C	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States State and City Activation State and City Activation Financial Return + The following option is selected: Organizer States State and City Activation State and City Activation Entity Type Top Consolidation
Form 20C-CRE	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States State and City Activation State and City Activation Financial Return + The following option is selected: Organizer States State and City Activation State and City Activation Entity Type Top Consolidation + The following option is not selected: Organizer States Alabama Return Options Print Suppression Election to file consolidated return for use in parent return only.
Form 20S (S Corp)	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Alabama Return Options Print Suppression Form 20S

Form 2220AL

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120 + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME tab | Und of Est Tax column | Alabama row + One of the following must be Yes: The following option is selected: Organizer | States | Alabama | Underpayment Options | Options to Compute and Print Underpayment Tax | Add penalty to tax and print form, if required or a penalty is due (Default) + One of the four "Reasons for Filing" options is selected at Organizer | States | Alabama | Underpayment Options + Schedule A is completed if the corporation is using the annualized income installment method OR Schedule B is completed if the corporation is using the seasonal installment method OR One of the following options is selected: Organizer | States | Alabama | Underpayment Options | Options to Compute and Print Underpayment Tax | Always print form but do not add penalty OR Always print form and add penalty OR print form with name only

Form 2220E

Tax Forms | States | Alabama Financial | Selected Options | Filing Type | Alabama Return Type | Financial Institutions checkbox is selected + Activation | Financial Return + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME tab | Und of Est Tax column | Alabama row + One of the following must be Yes: The following option is selected: Organizer | States | Alabama | Underpayment Options | Options to Compute and Print Underpayment Tax | Add penalty to tax and print form, if required or a penalty is due (Default) + One of the three "Reasons for Filing" options is selected at Organizer | State Financial | Alabama Financial | Underpayment Options + Schedule A is completed if the corporation is using the annualized income installment method OR Schedule B is completed if the corporation is using the seasonal installment method OR One of the following options is selected: Organizer | States | Alabama | Underpayment Options | Options to Compute and Print Underpayment Tax | Always print form but do not add penalty OR Always print form and add penalty OR print form with name only

Form 8948-AL

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Alabama | Return Options | Print Suppression | Form 20S + The following option is selected: Organizer | States | Alabama | General Information | Preparer Explanation for Not Filing Electronically | Activate Form 8948-AL

Form BIT-V

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120 + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + The following conditions are met for each payment type: Estimates: The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME tab | Est Tax column | Alabama row + The following option is not selected: Organizer | States | Alabama | Overpayment and Estimate Options | Estimated Tax tab | Compute and Print Options | Suppress print if no payments are due after applying overpayment + Tax Forms | States | Alabama | 20C-Tax Return | Page 1 | Line 21a | Drill down on hyperlink | Estimated Tax Schedule | Total Estimate line | Installment Amount minus Overpayment Applied minus Organizer | States | Alabama | Overpayment and Estimate Options | Estimated Tax tab | Payments on Next Years Estimated Tax | Sum of all quarters is greater than NONE + Organizer | States | Alabama | Overpayment and Estimate Options | Estimated Tax tab | Estimated Tax | Estimate Option does not equal Suppress compute and print + An amount exists on Tax Forms | States | Alabama | 20C-Tax Return | Page 1 | Line 17a | Drill down on hyperlink | Estimated Tax Schedule | Total Estimate line | Installment Amount or Payment Due columns. Extension: An amount exists on Tax Forms | States | Alabama | BIT-V Pmt Voucher | Amount Paid + Organizer | States | Common State | Estimates and Extensions | Estimates and Extensions | Extension tab | Alabama row | Column B On Extension is selected + Organizer | States | Common State | Estimates and Extensions | Estimates and Extensions | Extension tab | Alabama row | Column H Automatic Request is selected + Tax Forms | States | Alabama | BIT-V Pmt Voucher | Extension is selected. Return Payment: An amount exists on Tax Forms | States | Alabama | BIT-V Pmt Voucher | Amount Paid + Tax Forms | States | Alabama | BIT-V Pmt Voucher | Amended is not selected + Tax Forms | States | Alabama | BIT-V Pmt Voucher | Extension is not selected

Form EPT

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is selected: Organizer | States | Alabama | Return Options | Compute Options | Activate EPT + The following option is NOT selected: Organizer | States | Alabama | Return Options | Compute Options | Activate PTE-C + The following option is NOT selected: Organizer | States | Alabama | Return Options | Print Suppression | 20S + At least one shareholder exists in the return at Organizer | States | Alabama | Shareholder Information

Form ET-1

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Entity Type | Top Consolidation

Form ET-1C

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + The following option is selected: Organizer | States | State and City Activation | State and City Activation | Entity Type | Top Consolidation

Form ET-C	Tax Forms States Alabama Financial Selected Options Filing Type Alabama Return Type Financial Institutions is selected and Tax Forms States Alabama Financial Selected Options Filing Type Alabama Entity Type is Topconsolidation or Subconsolidation + Organizer States Alabama Return Options Print Suppression Election to file consolidated return checkbox is not selected
Form FIE-V	Estimate Payment: The following option is selected: Organizer States State and City Activation State and City Activation Financial Return + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab Est Tax column Alabama row + The following option is not selected: Organizer States Alabama Overpayment and Estimate Options Estimated Tax tab Compute and Print Options Suppress print if no payments are due after applying overpayment + an amount is entered at Tax Forms States Alabama Financial FIE-V - Estimated Tax Vouchers FIE-V Vouchers 1-4 Return Payment: The following option is selected: Organizer States State and City Activation State and City Activation Financial Return + Amount exists on the following field: Tax Forms States Alabama Financial FIE-V Pmt Voucher Amount Paid
Form PTE-C	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is selected: Organizer States Alabama Return Options Compute Options Activate Form PTE-C + The following option is selected on at least one shareholder: Organizer States Alabama Shareholder Information Shareholder name General Shareholder Information Nonresident
Form PTE-V	S Corp and PTE-C vouchers cannot print at the same time. To activate each type: S corp vouchers: Make sure Organizer States Alabama Return Options Compute Options Activate PTE-C option is NOT selected - OR -. PTE-C vouchers: Make sure Organizer States Alabama Return Options Compute Options Activate PTE-C options IS selected. +The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following conditions are met for each payment type: Estimates: The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab Est Tax column Alabama row + Amount exists on the following field(s): Tax Forms States Alabama PTE-V - Payment Vouchers PTE-V Vouchers 1-4 Amount Paid. Return Payment: Amount exists on the following field(s): Tax Forms States Alabama PTE-V Payment Voucher Amount Paid.
Schedule 20cA	
Schedule 20cB	
Schedule 20cBC	
Schedule 20cC	
Schedule 20cD2	
Schedule 20cE	
Schedule 20cF	

Schedule
20cOtherInformation

Schedule 20sA

Schedule 20sD

Schedule 20sD

Schedule 20sDE

Schedule 20sE

Schedule 20sG

Schedule 20sK

Schedule 20sL

Schedule AB The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120 + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + At least one name is entered in the following field: Organizer | States | Alabama | Intangible/Interest Expense Add Back | Recipient related member name | Name:**

Schedule AS

Schedule B

Schedule B1

Schedule B-1 The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME tab | State Forms column | Alabama row + The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120 + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Entity Type | Top Consolidation + One of the following conditions is met: At least one box is populated at Tax Forms | States | Alabama | 20C-Tax Return Financial Return | Page 2 | Schedule B | Column 6 OR At least one box is populated at Tax Forms | States | Alabama | ET-1 Financial Return | Page 2 | Schedule B | Column 6

Schedule BC

The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME tab | State Forms column | Alabama row + The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120 + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Entity Type | Top Consolidation + The following option is not selected: Organizer | States | Alabama | Return Options | Print Suppression | BC. + One of the following conditions is met: Amount(s) are entered at Tax Forms | States | Alabama | Schedule BC | Parts A - 0 OR Amount(s) are entered at Tax Forms | States | Alabama | Schedule BC | Schedule BC Pg 4 | Section C | Column 3 Credit Allowable OR An amount is entered at Tax Forms | States | Alabama | Schedule BC | Schedule BC Pg 5 | Section E | Line E3 OR Detail is entered at Tax Forms | States | Alabama | Schedule BC | Schedule BC Pg 5 | Section D

Schedule C

Schedule CP-B

The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME tab | State Forms column | Alabama row + Tax Forms | States | Alabama Financial | Selected Options | Filing Type | Alabama Entity type is not Top consolidation or Subconsolidation + one of the following fields is populated: Tax Forms | States | Alabama | 20C - Tax Return | 20C, Page 1 | Line 20c - OR-Tax Forms | States | Alabama Financial | ET-1 Financial Return | ET-1 Page 1 | Line 19c

Schedule D1

Schedule EC

The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME tab | State Forms column | Alabama row + The following option is selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + One of the following conditions must be met: An amount exists at Tax Forms | States | Alabama Financial | Schedule EC | Schedule EC Pg 1 | Section B | Line A8 OR An amount exists at Tax Forms | States | Alabama Financial | Schedule EC | Schedule EC Pg 1 | Section B | Line B6 OR An amount exists at Tax Forms | States | Alabama Financial | Schedule EC | Schedule EC Pg 3 | Section G | Line 3

Schedule EPTC

Schedule EPT-C

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is selected: Organizer | States | Alabama | Return Options | Compute Options | Activate EPT + The following option is NOT selected: Organizer | States | Alabama | Return Options | Compute Options | Activate PTE-C + The following option is NOT selected: Organizer | States | Alabama | Return Options | Print Suppression | 20S + A value exists in either of these fields: Tax Forms | States | Alabama | EPT-Electing Pass-Through Entity Rtn | EPT-C Electing Pass-Through Credits | Section C, Total Current Credits, Column 5 or Tax Forms | States | Alabama | EPT-Electing Pass-Through Entity Rtn | EPT-C Electing Pass-Through Credits | Section D, line 3

Schedule EPT-CK1	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is selected: Organizer States Alabama Return Options Compute Options Activate EPT + The following option is NOT selected: Organizer States Alabama Return Options Compute Options Activate PTE-C + The following option is NOT selected: Organizer States Alabama Return Options Print Suppression 20S + At least one shareholder exists in the return at Organizer States Alabama Shareholder Information
Schedule EPTK1	
Schedule ET1 Other Information	
Schedule ET1A	
Schedule ET1B	
Schedule ET1C	
Schedule ET1D1	
Schedule ET1E	
Schedule ET1EC	
Schedule ET1F	
Schedule FTI	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab State Forms column Alabama row + Tax Forms States Alabama Selected Options Filing Type Alabama Entity Type is not Top consolidation or Subconsolidation + Tax Forms States Alabama Selected Options Filing Type Alabama Return Type C Corporation or Financial Institutions checkbox is selected + Tax Forms States Alabama FTI - Sch of Adj to Fed Taxable Income Line 3 has a value that is not 0 or NONE
Schedule FTI	
Schedule K-1	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is selected: Organizer States Alabama Return Options Compute Options Activate Form PTE-C
Schedule KRCC	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab State Forms column Alabama row + The following option is not selected: Organizer States Alabama Return Options Print Suppression KRCC. Suppress print and e-file for all KRCCs + Tax Forms States Alabama Sch PC - Pass-Through Credits Sch PC Pg 3 Part R KRCC issued (must attach Form KRCC) is selected.
Schedule KRCC-B	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab State Forms column Alabama row + The following option is not selected: Organizer States State and City Activation State and City Activation Entity Type Top Consolidation + Organizer States Alabama Recipient's Share of Capital Credit Project Number Part III - Capital Credit Calculation Line 4 is populated.

Schedule NRA (S Corp)	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is selected: Organizer States Alabama Shareholder Information Shareholder name Alabama Nonresident + The following field has data: Tax Forms States Alabama Sch NRA - Nonresident Agreement Shareholder Name + The following option is selected: Organizer States Alabama Shareholder Information Shareholder name Nonresident Information NRA in effect for this shareholder and filed previously (exclude from PTE-CK1)
Schedule OZ	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab State Forms column Alabama row + The following option is not selected: Organizer States State and City Activation State and City Activation Entity Type Top Consolidation + One of the following conditions is met: The following option is selected at Tax Forms States Alabama 20C-Tax Return Financial Return Page 1 Opportunity Zone Investment (See Schedule OZ) OR Amount(s) are entered at Tax Forms States Alabama Schedule OZ line 4 and/or line 7.
Schedule PAB	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab State Forms column Alabama row + The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Alabama Return Options Print Suppression Form 20S + At least one instance of the following: Organizer States Alabama Intangible/Interest Expense Add Back Shareholder name Name:** + The following option is not selected: Organizer States State and City Activation State and City Activation Financial Return
Schedule PC	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression AL-ME tab State Forms column Alabama row + The following option is not selected: Organizer States Alabama Return Options Print Suppression Form 20S + Amount exists on Tax Forms States Alabama Schedule PC Schedule PC Pg 3 Part P Line 1

Schedule PCL

Tax Forms | States | Alabama Financial | Selected Options | Filing Type | Alabama Return Type | Financial Institutions is selected + Tax Forms | States | Alabama Financial | Selected Options | Filing Type | Alabama Entity Type is not Topconsolidation and is not Subconsolidation + Organizer | State Financial | Alabama Financial | Consolidated Return Information | Consolidated Parent Company Loss Allocation | Print PCL checkbox is selected. Press the Transfer to P & S button next to this checkbox. To generate Sch. PCL information for each member, first enter applicable amounts AT THE TOPCON at Organizer | State Financial | Alabama Financial | Consolidated Return Information | Consolidated Parent Company Loss Allocation | Consolidated parent company loss from loss parent's ET-1, line 15 (enter as negative), Subsidiaries total combined assets (enter as positive), and Consolidated loss from ET-1C, line 1. After entering these amounts AT THE TOPCON, press the three corresponding Transfer to P & S buttons as applicable. After pressing buttons, recompute all subsidiaries and reconsolidate AT THE TOPCON. This process pushes the information down to each member. If changes are made to the amounts entered in the above fields at the topcon, press the buttons again. If necessary, delete previously transferred data for Alabama at Organizer | States | State Combined Returns | State Consolidation Steps | Step 6 AT THE TOPCON first and then repeat all steps.

Schedule PTE-AJA

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is selected: Organizer | States | Alabama | Return Options | Compute Options | Activate Form PTE-C + The following option is selected on at least one shareholder: Organizer | States | Alabama | Shareholder Information | Shareholder name | General Shareholder Information | Nonresident + Organizer | States | Alabama | Shareholder Information | Shareholder Name | Nonresident Information section | Include shareholder's portion of Alabama Investment credit on composite return checkbox is selected + The following option is NOT selected: Organizer | States | Alabama | Shareholder Information | Shareholder name | Nonresident Information | NRA in effect for this shareholder and filed previously (exclude from PTE-CK1)

Schedule PTE-CK1

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is selected: Organizer | States | Alabama | Return Options | Compute Options | Activate Form PTE-C + The following option is selected on at least one shareholder: Organizer | States | Alabama | Shareholder Information | Shareholder name | General Shareholder Information | Nonresident

Worksheet 20s Tax Due

Worksheet Other Federal Items

Worksheet PC Credit Detail

Worksheet SB Health Insurance

Worksheet Schedule A Reconciliation Items

Worksheet Schedule B

Worksheet Schedule K 20S
Other Items

Alabama Privilege

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

Form/Schedule

Requirement(s) to Print

Form BPT-V

An amount exists on the following field: Tax Forms | States | Alabama | Alabama Privilege Tax | BPT-V Pmt Voucher | Amount Paid + ONE of the following options is selected: Tax Forms | States | Alabama | Alabama Privilege Tax | BPT-V Pmt Voucher | Form Type | CPT, PPT, BPT-IN. +To print extension voucher, Automatic Extension Payment must be selected +The Privilege Tax Due amount on the related CPT, PPT or BPT-IN must be greater than \$100 (see notes on CPT/PPT/BPT-IN, page 2, Privilege Tax Due field) or a refund must be requested on CPT/PPT, line 12.

Form CPT

The following option is not selected: Organizer | States | Alabama | Return Options | Print Suppression | Form CPT + The following option is not selected: Organizer | States | Alabama Privilege Tax | Tax Computation | Initial Return Calculation (BPT-IN) | Initial business privilege tax return + Tax Forms | States | Alabama | Alabama Privilege Tax | CPT Privilege Tax Return | CPT, Page 2 | Line 20 must be greater than \$100 (see note for line 20 in Tax Forms view) or a refund must be requested on CPT, line 12. + One of the following conditions is Yes: If top consolidation, one of the following options is selected: Tax Forms | States | Alabama Financial | Alabama Privilege Tax | Sch G - FIG Computation Sch | Sch G, Page 1 | Filing Election | Electing to file a consolidated BPT or member of a FIG filing separately OR If single company, return is not an 1120S and ONE type of taxpayer is selected at Tax Forms | States | Alabama | Alabama Privilege Tax | CPT - Privilege Tax Return | CPT, Page 1 | lines 2c-2f.

Form PPT

The following option is not selected: Organizer | States | Alabama | Return Options | Print Suppression | Form CPT (applies to PPT as well) + The following option is not selected: Organizer | States | Alabama Privilege Tax | Tax Computation | Initial Return Calculation (BPT-IN) | Initial business privilege tax return + Return is not an insurance, financial or consolidated return + Tax Forms | States | Alabama | Alabama Privilege Tax | PPT - Privilege Tax Rtn | PPT, Page 2 | Line 20 must be greater than \$100 (see note for line 20 in Tax Forms view) or a refund must be requested on PPT, line 12. + One of the following is Yes: C Corp return and the following option is selected: Tax Forms | States | Alabama | Alabama Privilege Tax | PPT - Privilege Tax Return | PPT, Page 1 | line 2c Disregarded Entity OR ONE of the following is selected: Tax Forms | States | Alabama | Alabama Privilege Tax | PPT - Privilege Tax Return | PPT, Page 1 | lines 2a-2c

Schedule AL-CAR (No longer required in software effective TY2023. Must be filed online. See Print Conditions.)

The Alabama Secretary of State Corporation Annual Report (AL-CAR) and Secretary of State fee are no longer required to be filed and paid with the Alabama Department of Revenue. For TY2023 (form year 2024) and forward, the ALCAR and its related fee are required to be filed and paid through the Alabama Secretary of State. Please visit the Alabama Secretary of State at <https://www.sos.alabama.gov/> for more information.

Schedule BPT-IN

The following option is not selected: Organizer | States | Alabama | Return Options | Print Suppression | Form CPT (applies to PPT and BPT-IN as well) + The following option is selected: Organizer | States | Alabama Privilege Tax | Tax Computation | Initial Return Calculation (BPT-IN) | Initial business privilege tax return + The return is does not have an entity type of Parent or Subsidiary at Tax Forms | States | Alabama | Selected Options | Filing Type | Alabama Entity Type + Return is not a top consolidation + Date of Qualification, Incorporation or Organization must be in the same year as the tax form (i.e. in TY2024 tax software, BPT-IN form date is 2025. Therefore, date of qualification must be in 2025.) + Tax Forms | States | Alabama | Alabama Privilege Tax | BPT-IN - Initial Privilege Tax Rtn | BPT-IN, Page 2 | Line 20 must be greater than \$100. (See note for line 20 in Tax Forms view) + If BPT-IN, line 3j is selected, two statements must be confirmed to be attached before BPT-IN will print: ALApport.pdf and NoNexStmt.pdf. (See instructions). To confirm the pdfs have been attached, select the two boxes at Organizer | States | Alabama | Privilege Tax | Tax Computation | Initial Return Calculation Information (BPT-IN section) | Two "If No Alabama Factor Presence Nexus box is selected..." boxes.

Schedule G

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + One of the following conditions is Yes: If top consolidation, one of the following options is selected: Tax Forms | States | Alabama Financial | Alabama Privilege Tax | Sch G - FIG Computation Sch | Sch G, Page 1 | Filing Election | Electing to file a consolidated BPT or member of a FIG filing separately + Tax Forms | States | Alabama | Alabama Privilege Tax | CPT Privilege Tax Return | CPT, Page 2 | Line 20 must be greater than \$100 (see note for line 20 in Tax Forms view) or a refund must be requested on CPT, line 12.

Schedule PTE-C Required
Entity Info

Worksheet BPTNWCPT

Worksheet BPTNWPPT

Worksheet CPT Financial
Cons Grp Comp

Alaska

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

Form/Schedule	Requirement(s) to Print
Form 0405-6150	Alaska is activated on the State and City Activation Organizer + AK State Forms are NOT suppressed on the Common State Print Suppression Organizer + Must select Form 6150 on State Alaska General Information Return Type

Form 0405-6240	Alaska is activated on the State and City Activation Organizer + AK State Forms are NOT suppressed on the Common State Print Suppression Organizer + Estimated tax or Extension are NOT suppressed on the Common State Print Options Print Suppression Organizer 1. If the voucher for extension, the following option is selected: Organizer States Common State Basic Return Information "Return Information" tab, "Return on Extension" column, "Alaska" row 1.2 The following option is not selected: Organizer States Pennsylvania Extension Information, "Extension Information" section, "Suppress Extension 1.3 one of the following has to be Yes: (Tax Forms States Alaska 0405-6240- extension payment Voucher, "Amount of your payment" - has to have a value greater than zero OR The following option has to be selected: Organizer States Common State Extension Options, "Force print all state extensions even without tentative tax amounts") 2.1 If the voucher is for the estimated tax, The following valid option is selected: Organizer States Common State Tax Estimate options Estimated Tax options Column 2.2 Valid Amounts due on form
Form 6220	Und of Est Tax is NOT suppressed on the Common State Print Options Print Suppression Organizer
Form AK6000	Alaska is activated on the State and City Activation Organizer + AK State Forms are NOT suppressed on the Common State Print Suppression Organizer + Must select Form 6000 on State Alaska General Information Return Type
Form6325	
Form6327	
FormAK6100	Alaska is activated on the State and City Activation Organizer + AK State Forms are NOT suppressed on the Common State Print Suppression Organizer + Must select Form 6100 on State Alaska General Information Return Type
FormAK6300	Form 6300 is NOT suppressed on the State Return Options Print Suppression; one of the following lines must have an amount.(line 27, 31, 45, 2b, 12, and 21)
FormAK6310	Form 6310 is NOT suppressed on the State Alaska Return Options Print Suppression and line 6 must have an amount of value.
FormAK6323	Form 6323 is NOT suppressed on the State Alaska Return Options Print Suppression and line 3 must have an amounts of value.
FormAK6385	Form 6385 is NOT suppressed on the State Alaska Return Options Print Suppression
FormAK6390	Form 6390 is NOT suppressed on the State Alaska Return Options Print Suppression and line 33 must have an amount of value.
FormAK6395	Form 6310 is NOT suppressed on the State Alaska Return Options Print Suppression and lines 17 or line 18 must have an amount of value.
Sch6100A, Sch6100B, SchC, SchE, Sch6100G, Sch6100I, SchJ, SchK, SchL	
SchA, SchB, SchC, SchE, SchH, SchI, SchJ, SchK, SchL	

Arizona

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

Form/Schedule	Requirement(s) to Print
Form 120	C Corp
Form 120/1065ES	Arizona is not suppressed on Organizer States Common State Print Suppression Est Tax column "Arizona" checkbox + Amount exists for Total Estimate under Tax Forms States Arizona Form 120-ES Drill down on Payment + Organizer States Common State Tax Estimate Options Estimated Tax Options "Only print vouchers for specific quarters" is marked for respective voucher number + One of the following has to be Yes: (Organizer States Common State Tax Estimate Options Estimated Tax Options "Only print vouchers with amounts" is not selected OR Tax Forms States Arizona 120ES - Estimated Vouchers 120ES respective voucher number has balance due)
Form 120/165EXT	C Corp + Arizona is not suppressed on Organizer States Common State Print Suppression Ext Tax column "Arizona" checkbox + One of the following has to be Yes: Amount exists on Line 5 under Tax Forms States Arizona 120EXT - Extension OR Force print extensions is selected
Form 120S (S Corp)	S Corp
Form 120S Schedule K-1	Must be a resident
Form 120X	C Corp + Activate amended return under Organizer States Arizona Amended Return "Check to activate amended return 120X" checked
Form 122	C Corp + "Print Form 122 for this company" checked under Organizer States Arizona Combined Return Information Subsidiaries + Taxpayer name required under Tax Forms States Arizona Combined Information 122 - Subsidiary Agreement 122
Form 140NR	S Corp + 10 or more NR Shareholders + Amount exists on Tax Forms States Arizona Composite Return 140NR, Page 1 Line 25
Form 204	S Corp + Print not suppressed under Organizer States Arizona Composite Return Form 204, Ext for 140NR + On extension under Organizer States Arizona Composite Return Form 204, Ext for 140NR Type of extension
Form 220	Is not suppressed on Organizer States Common State Print Suppression Und of Est Tax column "Arizona" checkbox + "Suppress penalty computation and do not print form" not checked under Organizer States Arizona Underpayment Options Option to Compute and Print Underpayment Penalty
Form 300	One of the following has to be Yes: (Amount exists for Total available nonrefundable tax credits under Tax Forms States Arizona Credits 300 - Nonrefundable Tax Credits 300 - Page 1 OR Amount exists for Total recapture under Tax Forms States Arizona Credits 300 - Nonrefundable Tax Credits 300 - Page 2 Part 2)
Form 308	Arizona Tax Forms/308/Line 29 and print suppression not checked at Arizona/return options
Form 308-S	AZ tax forms\credits\308: Line 36b must be checked and not suppressed at AZ \organizer\return options

Form 349	Arizona Tax Forms\Credits\349 Line 6 or 16 exists and not suppressed at Arizona/Organizer/Return options
Form 349-S	Data exists at AZ/tax forms/349/line 17b and not suppressed at AZ/organizer/return options
Form 51	
Form 51	C Corp + Topcon OR Force print under Organizer States Arizona Return Options "Print Form 51 even if not filing a combined or consolidated return + Taxpayer name required under Tax Forms States Arizona Combined Information 51 - Affiliated Schedule 51
Form ACA - Transportation Form	Amount exists under Tax Forms States Arizona Schedule ACA Line 3
Schedule ACA	
Schedule DFE	
Schedule K & K-1 Equivalent	S Corp + Not suppressed under Organizer States Arizona Return Options Print Suppression + Not suppressed under Organizer States Arizona Shareholder Information "Suppress the print of Schedule K-1 Equivalent
Schedule K-1(NR) (S Corp)	S Corp + Not suppressed under Organizer States Arizona Return Options Print Suppression
Schedule MSP - Multistate Service Provider Election and Computation	Question F must be checked

Arkansas

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

Form/Schedule

Requirement(s) to Print

Accounting Income

Additional Information

Apportionment Of Income

Corp. Franchise Tax Report Tax Forms | States | Arkansas |Corporation Franchise Report, section 7, Tax Due - has to have a value greater than zero

Form AR 8453-C One of the following has to be Yes: Arkansas has enabled e-file from Organizer | States | State E-file | Enable/Create Returns | "Enable" Column, active check box. OR Form AR8453-C is forced to print from Organizer | States | Arkansas | Return Options | Force Print section, "Form AR8453-C" check box.

Form AR 8453-S One of the following has to be Yes: + Arkansas is enabled e-file from Organizer | States | State E-file | Enable/Create Returns | "Enable" Column, active check box. OR Form AR8453-S is forced to print from Organizer | States | Arkansas | Return Options | Force Print section, "Form AR8453-S" check box.

Form AR1000CR Form AR1000CR is not suppressed from Organizer | States | Arkansas | Return Options | Print suppress section, "Form AR1000CR" check box.

Form AR1000CRES	One of the following has to be Yes, from Tax Form States Arkansas Form AR1100CRES: First installment has a payment; OR Second installment has an payment; OR Third installment has an payment; OR Forth installment has an payment;
Form AR1000CRV	Form AR1000CRV is not suppressed from Organizer States Arkansas Return Options Print suppress section, "Form AR1000CRV" check box. + There is a payment from Tax Form States Arkansas Form AR1100CRV.
Form AR1100CT	Organizer States State and City Activation State and City Activation with 1120 "Return Type
Form AR1100CTV	Organizer States State and City Activation State and City Activation + Form AR1100CTV is not suppressed from Organizer States Arkansas Return Options Print suppress section, "Form AR1100CTV" check box. + There is a payment amount from Tax Form States Arkansas AR1100CTV Corporate Payment Voucher, Amount Paid field.
Form AR1100ESCT	Organizer States State and City Activation State and City Activation + Not select print option 4 from Organizer States Arkansas Underpayment Options + There is a payment amount from Tax Form States Arkansas AR1100CTV Corporate Payment Voucher, Amount Paid field.
Form AR1100PET	
Form AR1100S (S Corp)	Organizer States State and City Activation State and City Activation with 1120S "Return Type
Form AR1103	Organizer States State and City Activation State and City Activation with 1120S "Return Type + One of the following has to be Yes: Form AR1103 is forced to print from Organizer States Arkansas Return Options Force Print section, "Form AR1103" check box. OR Not Consolidation return + There is any Small Business Corporation shareholder defined from Organizer States Arkansas SBC Shareholders SBC Shareholders + White paper details are not suppressed
Form AR1155	Do not suppress all extension form print by selecting Organizer Common State Print Options Print Suppression Suppress Options, "All extension" Check box. + Arkansas extension is not suppressed on Organizer States Common State Print Suppression, "Suppression AL-ME" page, "Arkansas" line, Extension checkbox + Arkansas is on extension form Organizer States Common State Estimates and Extensions Extension Tab, Arkansas row.
Members Share Of Income	
Schedule AR K-1 (S Corp)	Organizer States State and City Activation State and City Activation with 1120S "Return Type + Arkansas Sch K-1 is not suppressed on Organizer States Common State Print Suppression, "Suppression AL-ME" page, "Arkansas" line, K-1 Equiv checkbox + For each shareholder, Sch K-1 is not suppressed from Organizer States Arkansas Shareholder Information Shareholder Info. , "Suppress the print of Schedule K-1" check box.
Schedule AR1036	
Schedule AR1036S	

Schedule AR1099PT	Form AR1000CR is not suppressed from Organizer States Arkansas Return Options Print suppress section, "Form AR1000CR" check box. + There is a payment from Tax Form States Arkansas Form AR1099PT, line 3. + For each Non-resident shareholder, from Organizer States Arkansas Composite Return Nonresident Shareholders Nonresident Information: Form AR1099PT is not suppressed by "Check to suppress print of AR1099PT" check box. + "Check to NOT include non-resident shareholder on AR1000CR Composite Return" is not selected.
Schedule AR1100A	Organizer States State and City Activation State and City Activation with 1120 "Return Type + Arkansas Filling Status is "Multistate Corporation - Apportionment" from Tax Form States Arkansas AR1100CT, page 1, Filling Status.
Schedule AR1100BIC	
Schedule AR1100BIC	Organizer States State and City Activation State and City Activation with 1120 "Return Type + There is "Total Credits" from Tax Forms States Arkansas AR1100BIC Sch of Bus Incentive Tax Cr, line 7.
Schedule AR1100CO	Organizer States State and City Activation State and City Activation with 1120 "Return Type + There is "Total Credits" from Tax Forms States Arkansas AR1100CO Schedule of Contributions, line 10 Total Check-Off Contribution.
Schedule AR1100NOL	Organizer States State and City Activation State and City Activation with 1120 "Return Type + Form AR1100NOL is not suppressed from Organizer States Arkansas Return Options Print Suppression section, "Form AR1100NOL" check box. + There is NOL amount from last previous 5 years, Tax form States Arkansas AR1100NOL, NOL Amt fields.
Schedule AR1100REC	Organizer States State and City Activation State and City Activation with 1120 "Return Type + Form AR1100REC is forced to print Organizer States Arkansas Return Options Force Print section, "Form AR1100REC" check box. + Total income has amount from Tax Form States Arkansas AR1100CT, page 1, line 17. + one of the following has to be Yes: Part A, line 4 has amount from Tax Form States Arkansas AR1100REC OR Part B, line 4 has amount from Tax Form States Arkansas AR1100REC OR Part C, line 12 has amount from Tax Form States Arkansas AR1100REC
Schedule AR1100SA	Organizer States State and City Activation State and City Activation with 1120S "Return Type + Arkansas Filling Status is "Multistate Corporation - Apportionment" from Tax Form States Arkansas AR1100S, page 1, Filling Status.
Schedule AR1100SD	
Schedule AR1100WH	
Schedule AR1100WHC	
Schedule AR1100WHS	
Schedule AR2220ACT	Do not select print option 4 from Organizer States Arkansas Underpayment Options + There is Annualized Amounts from Tax Form States Arkansas AR2200A Part I, line 5.
Schedule AR2220APET	

Schedule AR2220CT	Not select print option 4 from Organizer States Arkansas Underpayment Options + one of the following has to be Yes: Print option 2 from Organizer States Arkansas Underpayment Options OR Print option 3 from Organizer States Arkansas Underpayment Options OR Print option 1 + Part 1, line 1 is greater than 1000 of Tax Form States Arkansas AR2200 + Part 2, there is amount for Total Penalty.
Schedule AR2220PET	
Schedule ARK1	
Schedule K Equivalent	Organizer States State and City Activation State and City Activation with 1120S "Return Type + Arkansas Sch K Equivalent is not suppressed on Organizer States Common State Print Suppression, "Suppression AL-ME" page, "Arkansas" line, K-1 Equiv checkbox
Subsidiary1100CT	
California	(Jurisdiction must be activated and released for forms/schedules to pri
Form/Schedule	Requirement(s) to Print
Form 100	Organizer States California Return Options Filing form 100W is not selected + Return is marked as a C corporation
Form 100-ES	Organizer States Common State Print Options Print Suppression Suppression AL-ME CA Estimated checkbox is not checked + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options
Form 100S (S Corp)	Return is marked as an S corporation
Form 100W	Organizer States California Return Options Filing form 100W is selected + Return is marked as a C corporation
Form 100-WE	Organizer States California Combined Return Information Waters Edge Information Complete form 100-WE is selected
Form 100X	Organizer States California Amended Return Activate Amended Return 100X checkbox is checked
Form 2416	Data has been entered at Organizer States California Combined Return Information List of Controlled Foreign Corp CFC Information + Organizer States California Combined Return Information Waters Edge Information Complete form 100-WE is selected
Form 3519	Return is marked on extension at States California Composite Returns Extension information + There is an amount on line 4 of the tax payment worksheet - drill down on tax due field of the form + At least one shareholder is marked to be included in the composite return
Form 3522 (LLC Voucher)	Form 568 is activated + Form 3522 is not suppressed at Organizer States California Disregarded Entity General Information Print Options + There is an amount due on the form
Form 3523	Data exists on line 46, 47, or 49 OR Force print the form is selected at Organizer States California Return Options

Form 3536	Form 568 is activated + There is an amount due of the form + Form 3536 is not suppressed at Organizer States California Disregarded Entity General Information Print Options
Form 3539	Form is on extension at Organizer Common State Estimates and Extensions Extensions tab
Form 3541	Data exists on line 6 of the form
Form 3544	Question 5(b) of form 100/100W is marked Yes + Data has been entered at Organizer States California Combined Return Information Election to Assign Credit
Form 3554	Data exists on line 8 or line 16 of the form
Form 3586	Data exists in the amount field on the form
Form 3588	Return is not consolidated + Form is activated at Organizer States California Disregarded Entity General Information + E-file is enabled + Payment by check method is selected at Organizer Common State General Information Bank Information Direct Debit tab + There is an amount due on the form
Form 3726	Question R is marked Yes on Form 100/100W + Data has been entered at Organizer States California Combined Return Information DISA and Capital Gains Information
Form 3801	Data exists on line 3 or line 11 + Form is not suppressed at Organizer States California Return Options
Form 3802	Return is a Personal Holding Company or Closely Held Corporation + Data exists on line 4 or line 9 of the form
Form 3805E	Data exists on line 19 of the form
Form 3805Q	Form is not suppressed at Organizer States California Return Options + Force print the form is selected at Organizer States California Return Options + Data exists on Part I, line 6 OR Data exists on Part III, line 1 OR Data exists on Part III, line 3
Form 3805Z	Form is not suppressed at Organizer States California Return Options + Data exists in Part 1,2, or 3
Form 3806	Data has been entered at Organizer States California Credits LARZ Credits
Form 3807	Data has been entered at Organizer States California Credits LAMBRA Credits
Form 3808	Data has been entered at Organizer States California Credits MEA Credits
Form 3809	Data has been entered at Organizer States California Credits TTA Credits
Form 3885	Data exists on line 16, 17, 20, or 21 + Form is not suppressed at Organizer States California State Adjustments Depreciation Adjustments
Form 3885L	Form is activated at Organizer States California Disregarded Entity General Information + Data exists on line 17a of form 568
Form 568	Form is activated at Organizer States California Disregarded Entity General Information + Data exists on line 1 or + Return is not suppressed at Organizer States California Disregarded Entity General Information Print Options

Form 5806	Form is not suppressed at Organizer Common State Print Options Print Suppression Suppression AL-ME + Option 1,2, or 3 is checked at Organizer States California Underpayment Options + There is an amount on line 22b of the form
Form 592B	Data exists on line 1 of the form + Print form 592-B is checked at Organizer States California Resident and Nonresident Withholding Withholding Statement (592)
Form 592V	There is payment due on the form
Form 593	DOES NOT PRINT - this is for e-file only
Form 8453-BE	California e-File extension is enabled at State E-file Enable/Create Extension + Authorization to debit funds is checked at Organizer Common State General Information Bank Information Extension - Debit tab + There is an amount due on line 1 of the form
Form 8453-C	California e-File is enabled at State E-file Enable/Create Returns or + Force print option is checked at Organizer States California Return Options + Form 568 is not activated
Form 8453-LLC	Form 568 is activated at Organizer States California Disregarded Entity General Information + California e-File is enabled at State E-file Enable/Create Returns
Schedule B	Data exists on Part I, line 1, 3 or 5 or Part II, line 1 or 3
Schedule C	There is an amount on line 25 of form 100S
Schedule D (100)	Schedule is not suppressed at Organizer States California Return Options Print Suppression Form 100, Side 6 + Schedule is not suppressed at Organizer States California Return Options Print Suppression Form 100, Side 6, Schedule D
Schedule D (100S)	There is an amount on part I, line 3 or part II, line 6, or part III, line 12
Schedule D (568)	Schedule 568 is activated at Organizer States California Disregarded Entity General Information + There is an amount on line 8 or line 9 of form 568, Side 5, Schedule K
Schedule D-1	Schedule is not suppressed at Organizer States California Return Options Print Suppression Schedule D-1 + Data exists on line 7 or line 17
Schedule G	This is whitepaper detail
Schedule H (100)	Organizer States California Return Options Filing form 100W is not selected + Dividend detail is entered at Organizer States California Dividend Income Dividend Income Detail
Schedule H (100W)	Organizer States California Return Options Filing form 100W is selected + Dividend detail is entered at Organizer States California Dividend Income Dividend Income Detail
Schedule K-1 (S Corp)	Organizer States Common State Print Options Print Suppression Suppression AL-ME CA K-1 Equiv checkbox is not checked + Shareholder name exists on the schedule

Schedule P (100)	Schedule is not suppressed at Organizer States California Return Options Print Suppression Schedule P + Organizer States California Return Options Filing form 100W is not selected
Schedule P (100W)	Schedule is not suppressed at Organizer States California Return Options Print Suppression Schedule P + Organizer States California Return Options Filing form 100W is selected
Schedule QS	California is marked as combine and S corporation at Organizer States State and City Activation + Data is entered at Organizer States California Combined Return Information QSub Information or + Force print option is selected at Organizer States California Return Options Force Print Schedule QS
Schedule R	Schedule is not suppressed at Organizer States California Return Options Print Suppression Schedule R + Net income for state purposes is not overridden at Organizer States California Allocation and Apportionment + Form 100/100W Schedule Q Side 3 Question M must be answered "Yes"

Colorado

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

Form/Schedule	Requirement(s) to Print
Distributed DR 106K - Colorado Schedule K-1	Print for all shareholders that flowing down to organizer Colorado listed under Shareholder Information.
DR 1705	S Corporation + Checked box Partnership or S corporation elect to be subject to tax at the entity level under SALT Parity Act in the Organizer Colorado SALT Parity Act Election.
DR 1706	S Corporation + Checked box to force print Paper file DR 1706 along with your shareholder's distributed K-1 in the Organizer Colorado Return Options Force Print section
Form 106 (S Corp)	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 - 6 prints if the option to suppress Part IV is not selected + If the option to suppress Part IV is not selected on Organizer Colorado Return Options Print Suppression)
Form 106CR (S Corp)	If Option checked to print Form 106CR and 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 suppressed Print of 106-EP on Organizer States Colorado Composite Return Under Estimated payments using DR 106-EP + Not suppressed on the States Common State Print Suppression Organizer + The respective voucher has data for an amount of payment
Form 112	Page 1 - 9 C-Corp + Page 5 - 6 if the option to suppress Schedule SF is not selected on Organizer Colorado Return Options Print Suppression + Page 7 if Affiliations Schedule Parent and the 1st Subsidiary member must have data + Page 8 - 9 if Affiliations Schedule Subsidiary members must have data

Form 112-CR	If Option checked to print Form 112CR or Force print option is checked on Organizer
Form 112-EP	Not suppressed print of 112-EP on 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 + States Colorado Return Under Estimated payments using Form 112-EP
Form 112X	Check to activate amended return (MANDATORY) or Force print Form 112X on Organizer Colorado Return Options Force Print form 112X
Form 205	Amount is present on line 22 on the form + Option 2, 3 or 5 is checked on "Indicate option for computation of underpayment penalty" on Organizer + Option 4 is NOT check on "Indicate option for computation of underpayment penalty" on Organizer + Option 1 is default to Blank on "Indicate option for computation of underpayment penalty" on Organizer + Not suppressed in Common State Organizer under "Underpayment of Estimate Tax + State of Colorado is activated as C-corp
Form CO 106 KD	
Form CO 106 KR	
Form CO 106 PartV	
Form CO 112 Schedule CCON	
Form CO 112 Schedule RF	C-Corp + Page 5 - 6 if the option to suppress Schedule SF is not selected on Organizer Colorado Return Options Print Suppression
Form CO 1330	if data exist for line 8b
Form CO 205	
Form CO-0349	Pass-Through Entity Name exists on Organizer States Colorado Credits Remediation of Contaminated Land Cr Add Pass-Through Entity Name.
Form CO-0375	
Form CO-0617	Vehicle Make entered on the organizer Colorado Credits Innovative Motor Vehicle Credit Add Vehicle Make. + Amount on line 8 on page 2 of DR 617.
Form CO-1366	Tax Form Form 112 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-0078A	Tax Form DR 1366 Page 10, line 87 has to have value greater than zero
Form DR-0107	Nonresident partner + Not including in composite + Elects to file Form 107 on the 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 the Organizer States Colorado Return Options + Nonresident partner + Not including in composite + Not checked Partner is not electing to file Form 108 on the 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-0900C	Generate Form 0900C is selected on the CO E-file Additional Information Organizer AND an amount of payment is on the tax form; No Select Print and Tax Form view available
Form DR-0900P	Generate Form 0900P is selected on the CO E-file Additional Information Organizer AND an amount of payment is on the tax form; No Select Print and Tax Form view available
Form DR-1316	(Colorado source capital gain has to have a value greater than zero Tax Form Form 112 Page 1 Line 10 OR Colorado source capital gain has to have a value greater than zero Tax Form Form 106 Page 1 Line 7 hyperlink to yellow workpaper) OR Force print Form DR 1316 Organizer Return Options
Form DR-158-C	(Return On Extension is selected on the States Common State Basic Return Information Return Information Organizer + Extensions is not suppressed on the States Common State Print Suppression Organizer + Not suppressed on the CO Extension Information Organizer + Not suppressed on the States Common State Extension Options Organizer + The option to force print all state extensions even without tentative tax amounts is selected on the States Common State Extension Options Organizer) OR Return On Extension is selected on the States Common State Basic Return Information Return Information Organizer + Extensions is not suppressed on the States Common State Print Suppression Organizer + Not suppressed on the CO Extension Information Organizer + Not suppressed on the States Common State Extension Options Organizer AND data is on the Due with extension field on the CO Extension Information Organizer)
Form DR-158-N	(Return On Extension is selected on the States Common State Basic Return Information Return Information Organizer + Extensions is not suppressed on the States Common State Print Suppression Organizer + Not suppressed on the CO Extension Information Organizer + Not suppressed on the States Common State Extension Options Organizer + the option to force print all state extensions even without tentative tax amounts is selected on the States Common State Extension Options Organizer) OR Return On Extension is selected on the States Common State Basic Return Information Return Information Organizer + Extensions is not suppressed on the States Common State Print Suppression Organizer + Not suppressed on the CO Extension Information Organizer + Not suppressed on the States Common State Extension Options Organizer AND data is on the Due with extension field on the CO Extension Information Organizer)
Form DR-1778	E-file enabled on Organizer States State E-file Enable/Create Returns + Mail with DR 1778 is selected on the CO E-file Additional Information Organizer
Form DR-8454	E-file enabled on Organizer States State E-file Enable/Create Returns + The signature option is selected on the Organizer Colorado E-file Additional Information Organizer
Received DR 106K - Colorado K-1	C or S corporation + Data entry in the Organizer Colorado Received DR 106K (K-1)
Sch C	Page 7 - 9 if Affiliations Schedule Parent and the 1st Subsidiary member must have data + If Schedule SF
Sch K Equivalent	No entry on the suppression of Schedule K Equivalents field on the Organizer States Colorado Return Options + No entry on the suppression of Schedule K Equivalent CO field on the States Common State Print Suppression

Connecticut

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

Form/Schedule	Requirement(s) to Print
Form 1120-RDC	Not top consolidation or sub-consolidation in Tax Forms States Connecticut Selected Options + Amount on form Part I, line 6 or + Amount on form Part III, total research and development tax credit carryforward to next year or + Amount on form Part III, total research and development tax credit applied to current year Page 2 prints if amount is on form , Part II, line 1 or line 7
Form CT K-1	S Corporation in Tax Forms Connecticut Selected Options + Suppress print of K-1 Equiv is not selected in Organizer States Common State Print Options Print Suppression Suppression Options + Shareholder name exists on form
Form CT-1120	Not top consolidation or sub-consolidation in Tax Forms States Connecticut Selected Options
Form CT-1120 ATT	Amount on Schedule H or Schedule I or Schedule J
Form CT-1120A	Not top consolidation or sub-consolidation in Tax Forms States Connecticut Selected Options + Amount on Schedule Q, line 9 or + Amount on Schedule S, line 3, apportionment factor + Air carrier using CT-1120A-A is not selected in Organizer States Connecticut Allocation and Apportionment
Form CT-1120A-A	Amount on form, line 5
Form CT-1120AB, Page 2	Amount on form, Schedule A, line 6 + Name of related member
Form CT-1120AB, Page 3	Answer question A on Schedule B or the letter date exists on question A
Form CT-1120AB, Page 4	Answer any yes/no questions on Schedule C or Schedule D
Form CT-1120AB, Page 5	Answer any yes/no question on the form
Form CT-1120AB, Page 6	Answer question A or question B or if there is an amount on line 3
Form CT-1120A-BMC	Amount on form, Schedule R-BMC, line 3 OR Amount on form, Schedule A-1, line 3, 4 or 5
Form CT-1120A-BPE	Amount on form, Schedule 1, line 5 OR Amount on form, Schedule 2, line 2 OR Amount on form, Schedule 3, line 5
Form CT-1120A-CCA	Amount on form, Schedule A-1, line 9 or + Amount on form, Schedule A-2, line 12 column B or line 13
Form CT-1120A-CU	Top consolidation in Tax Forms States Connecticut Selected Options + Member number exists for each parent/subsidiary on the form
Form CT-1120A-FS	Amount on form, line 15
Form CT-1120A-IRIC	Amount on form, Schedule A-1, line 12 OR Amount on form, Schedule A-2, line 15 + Amount on form RIC name on Tax Forms States Connecticut Apportionment CT-1120A-IRIC
Form CT-1120A-SBC	Amount on form, Schedule R-SBC, line 3 OR Amount on form Schedule A-1, line 8

Form CT-1120CU	Top consolidation in Tax Forms States Connecticut Selected Options + Corporation name exists for each parent/subsidiary on the form + Member number exists for each parent/subsidiary on the form
Form CT-1120CU-MI	Top consolidation in Tax Forms States Connecticut Selected Options + Member number exists on form
Form CT-1120CU-MTB	Top consolidation in Tax Forms States Connecticut Selected Options + Member number exists on form
Form CT-1120CU-NCB	Top consolidation in Tax Forms States Connecticut Selected Options + Line 3 on CT-1120CU, page 3 must be greater than \$2,500,000 OR Force print must be selected in Organizer Connecticut Return Options + Corporation name must exist for parent/subsidiaries in the form
Form CT-1120CU-NI	Top consolidation in Tax Forms States Connecticut Selected Options + Corporation name and member number exists for each parent/subsidiary in the form
Form CT-1120EDPC	Amount on form for line 1 or line 7 or line 8
Form CT-1120ESA	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Amount due on form
Form CT-1120ESB	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Amount due on form
Form CT-1120ESC	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Amount due on form
Form CT-1120ESD	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Amount due on form
Form CT-1120EXT	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation in Tax Forms States Connecticut Selected Options + Tentative amount of tax on form or NONE + Marked on extension in Organizer States Common State General Information Estimates and Extensions Extension
Form CT-1120HCIC	Not top consolidation or sub-consolidation in Tax Forms States Connecticut Selected Options OR Amount on form, Part I, line 9 OR Amount on form, Part II, line 8 OR Amount on form Part II, line 7
Form CT-1120I	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + Suppress penalty computation and do not print form is not selected in Organizer States Connecticut Underpayment Options + Another valid option to print is selected in Organizer States Connecticut Underpayment Options OR Amount on Tax Forms States Connecticut CT-1120I Page 2, line 23

Form CT-1120K	Must have an amount on the form in one of the totals
Form CT-1120PE	C Corporation in Tax Forms States Connecticut Selected Options + Amounts exist on form
Form CT-1120RC	Not top consolidation or sub-consolidation in Tax Forms States Connecticut Selected Options + Amount on form, Part I, line 4 OR Amount on form, Part II, total research and experimental expenditures tax credit carryforward to next year OR Amount on form Part II, total research and experimental expenditures tax credit applied to current year
Form CT-1120SI	S Corporation in Tax Forms Connecticut Selected Options + Shareholder name and number exists in the form
Form CT-1120SI (Supplemental Addendum)	S Corporation in Tax Forms Connecticut Selected Options + Shareholder name and number exists in the form + Number of shareholders is more than what can print on the applicable schedule on the return
Form CT-1120SI-EXT	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + Amount or NONE on line 3 of form OR On extension in Organizer States Common State Estimates and Extensions Extension tab
Form CT-8886	Listed transaction identification exists in Organizer Connecticut Listed Transactions CT-8886
FormCT10651120SIES1	
FormCT10651120SIES2	
FormCT10651120SIES3	
FormCT10651120SIES4	
SchCT10651120SICE	
SchCT10651120SINR	
Schedule CT1120KU	
Schedule CT-1120SIAB	Amount on form, Part I, line A 1 OR Amount on form, Part I, line B 1 OR Amount on form, Part II, line A 4 OR Amount on form, Part II, line B 1
Schedule CT-AB	S Corporation, page 1, Filing Basis is Y for Alternative Basis election
Schedule CT-CE	S Corporation, top consolidation in Tax Forms States Connecticut Selected Options + Y entered on page 1 PE is the designated combined reporting PE. Complete Schedule CE, combined election + Amounts exist on line 7 or 10 or totals exist

Delaware

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

Form/Schedule

Requirement(s) to Print

Form CIT-EST	C Corp + Organizer States Delaware Holding/Investment Co Info. Return "Check if this entity is a holding company" is not checked + Organizer States Delaware Holding/Investment Co Info. Return "Suppress print of Form 1120" is not checked + Delaware is not suppressed on Organizer States Common State Print Suppression, "Est Tax" column, "Delaware" checkbox + Amount exists for Total Estimate under Tax Forms States Delaware Form 1100-T, Estimate/Extension Drill down on balance due + Organizer States Common State Tax Estimate Options Estimated Tax Options "Only print vouchers for specific quarters" is marked for respective voucher number + One of the following has to be Yes: (Organizer States Common State Tax Estimate Options Estimated Tax Options "Only print vouchers with amounts" is not selected OR Tax Forms States Delaware Form 1100-T, Estimate/Extension 1100-T respective voucher number has balance due)
Form CIT-EXM	Form CIT-EXM Part 2 or Part 3 has "Name" entered.
Form CIT-HIC	C Corp + Organizer States Delaware Holding/Investment Co Info. Return "Check if this entity is a holding company" is checked
Form CIT-SCH	Form CIT-SCH page 1, line 6 has data
Form CIT-TAX	C Corp + Organizer States Delaware Holding/Investment Co Info. Return "Check if this entity is a holding company" is not checked + Organizer States Delaware Holding/Investment Co Info. Return "Suppress print of Form 1120" is not checked
Form SCT-RTN	S Corp
Form SCT-SSA	S Corp
Form SCT-SSR	S Corp + Organizer Shareholder Information Shareholder Data Shareholder Information Shareholder number exists + Organizer States Arizona Shareholder Information "Suppress the print of Schedule K-1 Equivalent" not checked
Form SCT-TAX	S Corp + Delaware is not suppressed on Organizer States Common State Print Suppression, "Est Tax" column, "Delaware" checkbox + Amount exists for Total Estimate under Tax Forms States Delaware Form 1100-P, Estimate/Extension Drill down on balance due + Organizer States Common State Tax Estimate Options Estimated Tax Options "Only print vouchers for specific quarters" is marked for respective voucher number + One of the following has to be Yes: (Organizer States Common State Tax Estimate Options Estimated Tax Options "Only print vouchers with amounts" is not selected OR Tax Forms States Delaware Form 1100-P, Estimate/Extension 1100-P respective voucher number has balance due)
SchCIT-TAXAdditions	
SchCIT-TAXApportionment	
SchCIT-TAXDirectAllocation	
SchCIT-TAXInterestIncome	
SchCIT-TAXSubtractions	

District of Columbia

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

Form/Schedule	Requirement(s) to Print
Combined Group Members' Schedule	Column A font is required by state and name is limited to 21 characters for print. District of Columbia must be marked as a Top Consolidation or Sub consolidation at Organizer States State and City Activation/Consolidation State and City Activation/Consolidation Entity Type column + Company name must be present at Organizer Consolidated Returns What to Consolidate Subsidiaries and Divisions Only Section
DC Combined Reporting Schedule 1A	Column amount font size and 9-character limitation is required by state. District of Columbia must be marked as a Top Consolidation or Sub consolidation at Organizer States State and City Activation/Consolidation State and City Activation/Consolidation Entity Type column
DC Combined Reporting Schedule 1B	Column amount font size and 12-character limitation is required by state. District of Columbia must be marked as a Top Consolidation or Sub consolidation at Organizer States State and City Activation/Consolidation State and City Activation/Consolidation Entity Type column + Company name must be present at Organizer Consolidated Returns What to Consolidate Subsidiaries and Divisions Only
DC Combined Reporting Schedule 2A	Column amount font size and 9-character limitation is required by state. District of Columbia must be marked as a Top Consolidation or Sub consolidation at Organizer States State and City Activation/Consolidation State and City Activation/Consolidation Entity Type column
DC Combined Reporting Schedule 2B	Column amount font size and 9-character limitation is required by state. District of Columbia must be marked as a Top Consolidation or Sub consolidation at Organizer States State and City Activation/Consolidation State and City Activation/Consolidation Entity Type column + Company Name must be present at Organizer Consolidated Returns What to Consolidate Subsidiaries and Divisions Only section
Economic Zone Credit Worksheet	Organizer States District of Columbia Return Options Print Suppression the check box for Economic development zone credit worksheet is not marked + Tax Forms States District of Columbia Schedule UB Bus Credit amount is present at Line 1
Form D-20	Column amount font size and character limitation (depending on schedule) is required by state. Organizer States District of Columbia Return Options Print Options do not have first two boxes marked (related to all zero returns) * Specific to D-20, Page 5, Schedule I: 1) Organizer States District of Columbia Return Options Print Suppression Form D-20, Schedule I check box should be blank: 2) Detail for Schedule I must have a property address entered at Organizer States District of Columbia Sch I - Inc From Rent Activity Address; 3) Detail for Schedule I-1 must have entry at Organizer States District of Columbia Sch I-1 Explanation column
Form D-20 CR	Column amount font size and 12-character limitation is required by state. QHTC is not available for combined reporting. Organizer States District of Columbia QHTC Reporting mark the check box to indicate this is a certified QHTC

Form D-20E	Return is being e-filed and Total DC Gross Receipts is reported at Tax Forms States District of Columbia D-20-Corporation Franchise Tax Return D-20, Page 2, Line 39
Form D-20-ES	Payment amount font size and 10-character limitation is required by state. DC is not suppressed on Organizer States Common State Print Options Print Suppression Suppression AL-ME State Forms column OR Est Tax column + Organizer States Common State Estimates and Extensions Estimate Options has not marked suppression + Organizer States District of Columbia Overpayment and Estimate Options Estimated Tax Payments on Next Year's Estimated Tax has an amount entered on DC for the related estimate payment. If Organizer States Common State Estimates and Extensions Estimate Options Only print vouchers for specific quarters section is completed, 1) the quarter required must be checked and 2) Only print vouchers with amounts must NOT be marked OR there must be an amount present on Tax Forms States District of Columbia D-20ES Declaration of Estimates Quarterly Payment box of the required quarter
Form D20-NOL	Note there are two separate NOL schedules for DC. Tax Forms States District of Columbia D-20 NOL Yr2000 to 2017; and D-20 NOL Year 2018+. NOL detail is entered at Organizer States District of Columbia Net Operating Loss and must include Tax Year, beginning with the earliest year first. If an amount presents at Tax Forms States District of Columbia D-20-Corporation Franchise Tax Return D-20 NOL reported line item, the system will determine which form is printed based on the Tax Year entered. If there is no NOL deduction calculated, client must force the print by entering NONE in the override field at Organizer States DC Net Operating Loss NOL Utilized in CY. * If a combined return is being filed, there must be a Parent entity included.
Form D-20P	Payment amount font size and 9-character limitation is required by state. Do not suppress at Organizer States District of Columbia Return Options Print Suppression
Form D-2220	Print options are available for this form at Organizer States District of Columbia Underpayment options.
Form FR-120	Payment amount font size and 12-character limitation is required by state. DC is not suppressed on Organizer States Common State Print Options Print Suppression Suppression AL-ME Ext column + Tax Forms States District of Columbia FR120-Extension of Time to File has an amount at Line 5 OR Organizer States Common State Estimates and Extensions Estimates and Extensions worksheet, Extension tab, District of Columbia is marked as On Extension in column B.
FormSupplemental20	
Sch1BSUB	
Sch2BSUB	
SchA20	
SchB20	
SchC20	

SchCRList

SchD20F

SchE20

Schedule SR

Amount(s) font size and 9-character limitation is required by state. Must be entered in the individual entity, not Topcon + Credit calculated at Tax Forms | District of Columbia | Schedule SR, Line 5 and this credit is reported at Tax Forms | District of Columbia | Schedule UB Bus Credit, Line 11

Schedule UB

Amount(s) font size and character limitation (depending on line item) is required by state. There must be an amount at Tax Forms | States | District of Columbia | Schedule UB Bus Credit | Line 9 + Organizer | States | District of Columbia | Return Options | Print Options do not have first two boxes marked (related to all zero returns)

SchF20

SchG20

SchH120

SchH220

SchI120

SchI20

SchSR1

Worldwide Combined
Reporting Election SUB Form

District of Columbia must be marked as a Top Consolidation or Sub consolidation at Organizer | States | State and City Activation/Consolidation | State and City Activation/Consolidation | Entity Type column + Organizer | States | District of Columbia | Combined Return Information | Combined Return Information | Suppress print of Worldwide Combined Reporting Election Form should not be checked.

Florida

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

Form/Schedule

Requirement(s) to Print

Form DR-405

Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME - for the first column "State Forms" FL is not checked + Florida tangible name is entered under Organizer | States | Florida | Florida Tangible Return | name | Florida Tangible Return | General Information - Corporate Name - DBA(Mandatory)

Form F-1120

Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME - for the first column "State Forms" FL is not checked

Form F-1120 ES

Valid estimate options selected in Organizer | States | Common State | Tax Estimate Options | Estimated Tax Options + Organizer | States | Florida | Overpayment and Estimate Options | Estimated Tax | Compute and Print Options | Suppress print if no payments are due after applying overpayment is not marked

Form F-1120X	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression AL-ME - for the first column "State Forms" FL is not checked + Option to "Print F-1120X - Mandatory" is selected under Organizer States Florida Amended Return
Form F-1122	Organizer States Florida Combined Return Information Authorization to be Included Subsidiary Information name has to be entered + Select the option to "Print Form 112 for this company Organizer States Florida Combined Return Information Authorization to be Included Subsidiary Information or Select the option to "Print Form 1122 for every Member of the consolidation" under Organizer States Florida Combined Return Information Authorization to be Included Parent Information
Form F-2220	Organizer States Common State Print Options Print Suppression Suppression AL-ME tab Und of Est Tax is not selected for FL + Organizer States FL Underpayment Options Option to Compute and Print Underpayment Penalty Suppress penalty computation and do not print form is not selected
Form F-7004	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression AL-ME - for the first column "State Forms" FL + Organizer States Common State Print Options Print Suppression Suppression AL-ME tab Ext is not selected for FL + Selected the FL "On Extension" under Organizer States Common State Estimates and Extensions and on the first tab "Extension + There is an amount on line 1 "Tentative amount of Florida tax for the taxable year " or a reason under section A the top line is entered under Tax Forms States Florida F-7004 - Extension
Form F-851	Consolidated return and not a S-corp return + There is data flowing to the form.
FormF1120-SchI	
FormF1120-SchII	
FormF1120-SchIII	
FormF1120-SchIV	
FormF1120-SchR	
FormF1120-SchV	
WksEstTax	

Georgia

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

Form/Schedule

Requirement(s) to Print

Form 4562	Organizer States Georgia Return Options Print Suppression Corporate Return not selected + Return is a C-Corp + Organizer States Georgia Return Options Force Print Georgia 4562 checkbox is checked OR Tax Forms States Georgia 600 - Tax Return 600, Page 2 Schedule 4 line 8 is not equal to Schedule 5 line 4 + Organizer States Georgia Return Options Depreciation Georgia 4562 suppression checkbox is not checked + Tax Forms States Georgia GA 4562 General Depreciation and Amort 4562 Page 2 Line 22 is populating OR Tax Forms States Georgia GA 4562 General Depreciation and Amort 4562 Page 3 line 44 is populating OR Tax Forms States Georgia GA 4562 General Depreciation and Amort 4562 Page 1 line 8 is populating
Form 600	Return is a C-Corp
Form 600 UET	Tax Forms States Georgia 600 UET Line 19 has an amount + Organizer States Common State Print Options Print Suppression Suppression AL-ME GA Und of Est Tax suppression checkbox is not checked
Form 600S (S Corp)	S corp
Form 600S-CA	S corp + Organizer States Georgia Return Options S Corporation Shareholder Forms Non-resident consent agreements suppression checkbox not checked + Organizer Shareholder Information Shareholder Data Shareholder Information There is at least one shareholder that is a nonresident
Form 602ES	Organizer States Common State Tax Estimate Options Estimated Tax Options Georgia is not selected as a 2
Form 900	Organizer States State and City Activation State and City Activation Column F "Financial Return" has a selection + Organizer States Georgia Return Options Financial Return suppression checkbox not checked
Form CR ES	S corp + Organizer Shareholder Information Shareholder Data Shareholder Information State Shareholders Information tab Shareholder is electing composite for Georgia + Tax Forms States Georgia CR-ES Vouchers 1-4 Amount due must be greater than NONE
Form CR PV	S corp + Organizer Shareholder Information Shareholder Data Shareholder Information State Shareholders Information tab Shareholder is electing composite for Georgia + Tax Forms States Georgia IT-CR Page 1 Line 7 must be greater than 0 OR Organizer States Georgia Composite Return Composite Return Composite Return Payment Voucher There is an amount on Amount Due Field
Form G-1003	S corp + Organizer States Georgia Income Statement Return File Form G-1003 is checked
Form G2-A	S corp + Tax Forms States Georgia G2-A - Nonresident Withholding Shareholder G2-A Copy 1 Line 6 or Line 7 has an amount greater than NONE + Organizer States Georgia Return Options S Corporation Shareholder Forms Non-resident withholding suppression checkbox is NOT checked
Form G-7NRW	S corp + Organizer States Georgia Nonresident Withholding Tax File Form G-7 NRW Nonresident Withholding Return is checked
Form GA-8453C	C corp
Form GA-8453S	S corp

Form IT-303	Organizer States Georgia Extension Information Extension Voucher Payments (s) Enclosed Income Tax checkbox is checked
Form IT-552	C corp + Organizer States Georgia Application for Tentative Carry-Back Include Form IT 552 with Return checkbox is checked
Form IT-560-C	Organizer States Georgia Extension Information Extension Voucher Payments (s) Enclosed Income Tax checkbox is checked + Organizer States Common State Estimates and Extensions Column E "1st Extension Amount Paid" has an amount
Form IT-Addback	Organizer States Georgia Related Member Intangible/Interest Exp Related Member Exceptions At least one member exists + "Exception for Income Allocated or Apportioned to and Taxed by Georgia or Another State OR "Exception for Expenses Paid, Accrued, or Incurred to a Related Member Domiciled in a Foreign Country OR "Exception for Expenses Paid to a Related Member Who Paid Expenses to a Person Who Is Not a Related Member": one of three sections are populated
Form IT-CONSOL	Return needs to be a Sub-Consolidation or a Top-Consolidation + Organizer States Georgia Application for Consolidation Print Option Print form IT-CONSOL Needs to be checked
Form IT-CR	S corp + Organizer States Georgia Return Options Print Suppression Corporate Return is NOT checked + Organizer Shareholder Information Shareholder Data Shareholder Information State Shareholders Information tab Shareholder is electing composite for Georgia
Form PT-440	Organizer States State and City Activation State and City Activation Column F "Financial Return" has a selection + Organizer States Georgia Return Options Financial Return suppression checkbox not checked
Form PV-CORP	Tax Forms States Georgia PV-CORP Amount needs to be greater than NONE
Shareholder's Schedule of Distribution and Income	S corp + Organizer States Georgia Return Options S Corporation Shareholder Forms Distribution of Income is not checked to suppress + Organizer Shareholder Information Shareholder Data Shareholder Information There is at least one shareholder that exists

Hawaii

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

Form/Schedule

Requirement(s) to Print

Form F-1	The Financial return Form F-1 is activated - a checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F
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Form FP-1	The Financial return Form F-1 is activated - a checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + Option to suppress estimates is not selected at Organizer States Common State Print Options Print Suppression "Suppression AL-ME" tab Hawaii checkbox for column "Est Tax + The option to suppress compute and print must not be chosen at Organizer State Financial Hawaii Financial Overpayment and Estimates Options Estimated Tax tab "Estimated Tax" section + One of the following has to be Yes: (Current total tax due in the amount of \$500 or more OR An amount entered in any one quarter (1-4) at Organizer State Financial Hawaii Financial Overpayment and Estimates Options Estimated Tax tab "Payments on Next Year's Estimated Tax" section OR An amount in either "Amount of installment" or "Overpayment applied" columns in any one installment line at Organizer State Financial Hawaii Financial Overpayment and Estimates Options Estimated Tax tab "Monthly Installments (Required if estimated tax liability exceeds \$100,000)" section OR The option to print estimate with alphabetic information only is chosen at Organizer State Financial Hawaii Financial Overpayment and Estimates Options Estimated Tax tab "Estimated Tax" section)
Form N-15	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + S-Corp + The option to suppress the printing of Form N-15 must not be marked at Organizer States Hawaii Composite Information General Information "General Information" section + The following must be Yes: (At least one shareholder with a shareholder number must exist + At least one shareholder must be a NON-resident of Hawaii)
Form N-201V	+ The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + An amount populated on line "Amount of Payment
Form N-220	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression AL-ME" tab Hawaii checkbox for column "State Forms + The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + Option to suppress underpayment of estimated tax is not selected at Organizer States Common State Print Options Print Suppression "Suppression AL-ME" tab Hawaii checkbox for column "Und of Est Tax + Option to compute and print underpayment penalty is not suppressed at Organizer States Hawaii Underpayment Options "Option to Compute and Print Underpayment Penalty" section + Default option (option one) is not chosen at Organizer States Hawaii Underpayment Options "Option to Compute and Print Underpayment Penalty" section
Form N-30	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + C corp
Form N-30, Schedule D	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + An amount populated on line 16

Form N-30, Schedule O	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + One of the following must be Yes: (An amount populated on line 38 OR An amount populated on line 1 OR An amount populated on line 6 OR An amount populated on line 10 OR An amount populated on line 22 OR An amount populated on line 27)
Form N-30, Schedule P	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + An percentage populated on line 5
Form N-309	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + The following must be Yes: (An amount populated on line 1 - "Amount \$ + An amount populated on line 11, columns (a), (c), or (e)) for the 3rd thru 1st preceding taxable year ended for tab 1 to print or for the 5th thru 4th preceding taxable year ended for tab 2 to print
Form N-312	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + The option to compute the form is checked at Organizer States Hawaii Credits General Credits "Capital Goods Excise Tax Credit" section + One of the following must be Yes: (An amount populated on line 7 OR An amount populated on line 13)
Form N-35	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + S corp
Form N-35, Schedule D	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + S corp + One of the following is Yes: (An amount populated on line 8, column f OR An amount populated on line 8, column g OR An amount populated on line 17, column f OR An amount populated on line 17, column g)
Form N-35, Schedule K-1	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + S corp + Option to suppress K-1's is not selected at Organizer States Common State Print Options Print Suppression "Suppression AL-ME" tab Hawaii checkbox for column "K-1 Equiv + At least one shareholder must exist
Form N-35, Schedule NS	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + S corp + At least one shareholder must exist + The checkbox to print schedule NS must be checked at Organizer States Hawaii Shareholder Information {shareholder} Shareholder Information tab "Schedule NS" section
Form N-4	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + S corp + At least one shareholder must exist + An amount entered at Organizer States Hawaii Shareholder Information {shareholder} Shareholder Information tab "Schedule N and Form N-4" section "Amount of payment (tax withheld) on Form N-4 (Mandatory for N-4 to print) line

Form N-755	The Financial return Form F-1 is activated - a checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + Option to suppress extensions is not selected at Organizer States Common State Print Options Print Suppression "Suppression AL-ME" tab Hawaii checkbox for column "Ext + One of the following has to be Yes: An amount populated on line 4c OR Hawaii is marked as "On Extension" at Organizer States Common State Estimates and Extensions "Extension" tab Column B for Hawaii
Schedule AMD	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + Schedule AMD must be activated at Organizer States Hawaii Amended Return + There must be an explanation entered at Organizer States Hawaii Amended Return "Explanation of Changes" column
Schedule CR	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression AL-ME" tab Hawaii checkbox for column "State Forms + The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + C corp + One of the following must be Yes: (An amount populated on line 16 OR An amount populated on line 25)
Schedule D-1	The Financial return Form F-1 is not activated - no checkmark at Organizer States State and City Activation State and City Activation Line for Hawaii Column F + One of the following must be Yes: An amount populated on line 8 OR An amount populated on line 19 OR An amount populated on line 33

Schedule PTE

Schedule PTEU

Idaho

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

Form/Schedule	Requirement(s) to Print
Form 41	C Corp and Company name have data
Form 41A	
Form 41ES	If Form 41ES Voucher payment "amount" have data + Estimated Tax payment greater than "NONE"
Form 41ESR	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression AL-ME State Forms Underpayment of Estimated Tax + Form 41ESR Line 24 must have data
Form 41S (S Corp)	S Corp and Company name have data
Form 42	Part I Line 21 have data or Part II Line 8 or Line 14 have data.
Form 42A	
Form 44	Form 44 Line 11(Total business income tax credits) or Line 7(Total tax from recapture of business income) have data.
Form 49	Part I Line 8 or Part II Line 8 have data

Form 49ABE	
Form 49C	Line 35(Page 2) Carryover to 2016 have data
Form 49R	Part III Line 9(Columns A thru E) have data
Form 55	Page 2 Line 15 or Page Line 34 have data
Form 56	NOT suppressed on Organizer States Return Option Suppress NOL Schedule
Form 56A	
Form 67	Page 1 Line 22
Form 68	Form 68 line 1 have data
Form 68R	
Form 69	Form 69 line 1 have data
Form 69R	Form 69R line 1 have data
Form 71	Form 71 line 5 have data
Form 71R	Form 71R line 9 have data
Form 72	
Form 72/S	N/A
Form 75	Form 75 Section IV Line 1, or, 2, or 3 or 4, or 5, or 6, or 7 have data
Form ID-529	
Form PTE-12	Print check option is checked
ITC Equipment List	Cannot find this form in print menu
Schedule ID K-1	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression AL-ME State Forms K-1 Equivalent + OR if Organizer States Idaho Return Option "to select appropriate Federal K Numbers" is checked
Schedule K Equivalent	S-Corp + Not suppressed on Organizer States Common State Print Options Print Suppression Suppression AL-ME State Forms K-1 Equivalent + OR Not suppressed in Organizer General Information Return and Print Options K-1 Package Print Option Idaho Print/Suppress + AND Shareholder number must have data

Illinois

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

Form/Schedule	Requirement(s) to Print
Form IL-1000-E	Organizer States Illinois Shareholder Information, check the box to "Provide Form IL-1000-E, Certificate of Exemption for Pass-through Entity Payments"
Form IL-1120	Organizer States Illinois Return Options Print Suppression Form IL-1120 on top consolidation is not checked
Form IL-1120-ST (S Corp)	Tax Form States Illinois Selected Options Filing Type S Corporation is marked

Form IL-1120-ST-V	Organizer States Illinois Amended Return Activate Form IL-1120-ST-X is not marked + Tax Form States Illinois Payment Vouchers IL-1120-ST-V, Payment Amount must have an amount greater than zero + If the return is e-filed, Organizer States Common State General Information Bank Information Direct Debit tab Illinois Column E - Tax Payment/Refund Method, "Check" must be selected
Form IL-1120-ST-X	Organizer States Illinois Amended Return Activate Form IL-1120-ST-X is marked
Form IL-1120-ST-X-V	Organizer States Illinois Amended Return Activate Form IL-1120-ST-X is marked + Tax Form States Illinois Payment Vouchers IL-1120-ST-X-V, Payment Amount must have an amount greater than zero
Form IL-1120-V	Organizer States Illinois Amended Return Activate Form IL-1120-X is not marked + Tax Form States Illinois Payment Vouchers IL-1120-V, Payment Amount must have an amount greater than zero + If the return is e-filed, Organizer States Common State General Information Bank Information Direct Debit tab Illinois Column E - Tax Payment/Refund Method, "Check" must be selected
Form IL-1120-X	Organizer States Illinois Amended Return Activate Form IL-1120-X is marked
Form IL-1120-X-V	Organizer States Illinois Amended Return Activate Form IL-1120-X is marked + Tax Form States Illinois Payment Vouchers IL-1120-V, Payment Amount must have an amount greater than zero
Form IL-2220	Organizer States Common State Print Options Print Suppression Suppression AL-ME tab Und of Est Tax is not selected for Illinois + Organizer States Illinois Underpayment Options Option to Compute and Print Underpayment Penalty Suppress penalty computation and do not print form is not selected
Form IL-4562	Line 4 or line 10 has an amount OR Organizer States Illinois Return Options Force Print Form IL-4562 is marked
Form IL-4562	Line 4 or line 10 has an amount OR Organizer States Illinois Return Options Force Print Form IL-4562 is marked
Form IL-477	Line 2G has an amount OR Step 2 "If your business is new to Illinois, check this box" is marked OR Line 13 has an amount OR Line 16 Column A has an amount
Schedule 1299-A (S Corp)	Must claim credit for at least one of the credits listed on the tax form
Schedule 1299-B	Must claim subtraction for at least one of the subtractions listed on the tax form
Schedule 1299-D	Must claim credit for at least one of the credits listed on the tax form
Schedule 4255	Line 18, Column A, B or C must have data
Schedule 80-20	Line 13 or line 32 must have data
Schedule B (S Corp)	Tax Form States Illinois Selected Options Filing Type S Corporation is marked
Schedule F (S Corp)	Detail is entered for line 1 OR Line 2, 3, 4, 5, 6 or 7
Schedule INL	Step 1, item C, either Cooperative Adjustments or REMIC Adjustments is marked

Schedule INS	Tax Form States Illinois Selected Options Filing Type Top consolidation and sub-consolidation are not marked + Organizer States Illinois Return Options Print Suppression Schedule INS/Schedule UB/INS is not marked + Organizer States Illinois General Information General Information, Foreign Insurer is marked + Either line 16 or line 18 must have data + Line 15 is less line 12
Schedule J	Step 1 line 15 has an amount and is not NONE
Schedule K-1-P (S Corp)	Organizer States Common State Print Options Print Suppression Suppression AL-ME tab K-1 Equiv is not selected for Illinois + Organizer States Illinois Shareholder Information, Suppress the print of Schedule K-1-P is not marked for the shareholder
Schedule K-1-P(3)	Organizer States Common State Print Options Print Suppression Suppression AL-ME tab K-1 Equiv is not selected for Illinois + Organizer States Illinois Shareholder Information, Suppress the print of Schedule K-1-P is not marked for the shareholder
Schedule K-1-T	Organizer States Illinois State Adjustments Pass Through Input Schedule K-1-T, at least one activity has been entered + Organizer States Illinois Return Options Print Suppression section, Schedule K-1-T from estates/trusts, is not marked
Schedule M	Line 10 or line 34 has data
Schedule NB	Tax Form States Illinois IL-1120, line 23A is not marked (C Corp), or, IL-1120-ST, line 35A is not marked (S Corp) + Organizer States Illinois Allocation and Apportionment Overrides Net nonbusiness income everywhere and Net nonbusiness income within Illinois do not have data + Tax Form line 12 Column A, Total everywhere, has data
Schedule UB	Organizer States State and City Activation/Consolidation Illinois, select "Combine"
Schedule UB/INS	Organizer States State and City Activation/Consolidation Illinois, select "Combine + Organizer States Illinois Return Options Print Suppression Schedule INS/Schedule UB/INS is not marked + Tax Form States Illinois Combined Report Sch UB/INS-Tax for UBG with Foreign Ins Sch UB/INS, Pg 1, Foreign Insurer is marked for parent or at least one of the subsidiaries + Tax Form States Illinois Combined Report Sch UB/INS-Tax for UBG with Foreign Ins Sch UB/INS-Foreign Insurer Members Sch UB/INS, Page 3, line 59 or line 72 must have data

Indiana

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

Form/Schedule

Requirement(s) to Print

Form E-6

This form is not suppressed in Organizer | States | Common State | Print Options | Print Suppression | Suppression AL-ME. + If an Installment amounts and dates are present in Organizer | States | Indiana | Overpayment and Estimate Options | Estimated Tax, it will print.

Form FIT-20 (1-4)

Return type must be an C-corporate and then go to Organizer | States | State and City Activation | State and City Activation and activate Indiana Financial Return.

Form FT-20NOL	Current year if line 18
Form FT-ES	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME and amount exist in Tax Forms States Indiana Financial Institution Form FT-ES / FT-EXT Form FT-ES Voucher 1-4
Form FT-EXT	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME and amount exist in Tax Forms States Indiana Financial Institution Form FT-ES / FT-EXT FIT-20, Form FT-EXT
Form IT-20	Automatic if filing return type C-corporation
Form IT-20COMP (S Corp)	Needs a nonresident Shareholder Name only
Form IT-20REC	If data exists on Tax Forms States Indiana Sch IT-20REC line 8
Form IT-20S (S Corp)	Automatic if filing return type S-corporation
Form IT-20X	To activate, go to Organizer States Indiana Amended Return and check the first box
Form IT-2220	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME and select Option (2) or (3) or data on line 3 or line 6 to compute and print underpayment penalty in Organizer States Indiana Underpayment Options and if data exist Tax Forms States Indiana IT-2220-Penalty for Underpayment line 16.
Form IT-6	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME and amount exist in Tax Forms States Indiana IT-6-Quarterly Income Tax Return IT-6 Voucher 1-4
Form IT-6WTH (S Corp)	If data exist in the amount field Tax Forms States Indiana IT-6WTH Composite Withholding Voucher.
Form IT-8879-S	If not suppressed in Organizer States Indiana Return Options
Form WH-1U	If not suppressed in Organizer States Indiana Return Options
IN-PTET Pass Through Entity Tax Election	Check the box under Organizer > State > Indiana ?> IN-PTET Pass Through Entity Tax Election
Schedule 20 FSD	
Schedule 20 PIC	
Schedule 8-D	If Top consolidated or Sub consolidated and not unitary return
Schedule CC-40	
Schedule E-7	If not suppressed in Organizer States Indiana Return Options
Schedule EZ	If data exist on IT-20 page 2 line 27
Schedule F	For Single and Consolidated
Schedule FIT-NRTC	Return type must be an C-corporate and then go to Organizer States State and City Activation State and City Activation and activate Indiana Financial Return.
Schedule IN K-1	If Shareholder Name is present
Schedule IN-COMPA (S Corp)	If Nonresident shareholders exist

Schedule IN-EDGE	If data exists on Tax Forms States Indiana IN-EDGE Credit line 19
Schedule IN-EDGE-R	If data exists on Tax Forms States Indiana IN-EDGE-R Credit line 19
Schedule IN-OCC (S Corp)	If data exists on Tax Forms States Indiana Sch IN-OCC Schedule IN-OCC line 17
Schedule IT-20NOL	If not suppressed in Organizer States Indiana Return Options
Schedule IT-2220	
Schedule LIC	If data exists on Tax Forms States Indiana Schedule LIC Schedule LIC Line 5
Schedule M	If not suppressed in Organizer States Indiana Return Options
Unitary Schedule 1	If not suppressed in Organizer States Indiana Return Options
WH-1 Monthly/Annual Coupons	If not suppressed in Organizer States Indiana Return Options
WH-3 Summary Print	If not suppressed in Organizer States Indiana Return Options

Iowa

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

Form/Schedule

Requirement(s) to Print

Form 1120V EXT	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + ((1120V has payment amount + Organizer States Common State Print Options Print Suppression Suppression AL-ME Ext Tax for Iowa is not selected) OR (Force Print is selected + Iowa is on extension)) + Tax Forms States Iowa 1120V Extension/Tax Due 1120V - Tax Due Payment amount has data
Form 2020 IA	
Form IA 101	
Form IA 102	
Form IA 103	
Form IA 1120	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected
Form IA 1120ES	C corp Organizer States Common State Print Options Print Suppression Suppression AL-ME Est Tax for Iowa is not selected + Tax Forms States Iowa IA 1120ES Estimated Tax Vouchers IA 1120ES Voucher 1 1120ES has data
Form IA 1120S (S Corp)	S corp
Form IA 1120S Schedule K-1	S corp + Tax Forms States Iowa IA 1120S S Corporation IA 1120S Schedule K IA 1120S Sch K X to suppress print is not checked

Form IA 1120V	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + ((1120V has payment amount + Organizer States Common State Print Options Print Suppression Suppression AL-ME Ext Tax for Iowa is not selected) OR (Force Print is selected + Iowa is on extension)) + Tax Forms States Iowa 1120V Extension/Tax Due 1120V - Tax Due Payment amount has data
Form IA 1120X	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + Organizer States Iowa Amended Return Activate Form IA 1120X checkbox is selected
Form IA 124	
Form IA 128	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected Organizer States Iowa Credits Research Activities Credit Alternative Simplified is not checked + Tax Forms States Iowa IA 128 Research Activities Credit Line 33 has data
Form IA 128S	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + Organizer States Iowa Credits Research Activities Credit Alternative Simplified is checked Tax Forms States Iowa IA 128S Alt. Simple. Research Act. Cr has valid data
Form IA 133	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + Forms States Iowa IA 133 New Jobs Tax Credit IA 133, Page 1 Line 5 has data
Form IA 135	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + (Tax Forms States Iowa IA 135 E85 Gasoline Promotion Tax Credit Line 3 has data OR Tax Forms States Iowa IA 135 E85 Gasoline Promotion Tax Credit Line 4 has data)
Form IA 138	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + (Tax Forms States Iowa IA 138 E15 Plus Gasoline Promotion TC Line 4 has data OR Tax Forms States Iowa IA 138 E15 Plus Gasoline Promotion TC Line 10 has data)
Form IA 147	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + Tax Forms States Iowa IA 147 Iowa Franchise Tax Credit Line 14 has data
Form IA 148	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + Tax Forms States Iowa IA 148 Tax Credits Schedule Part III Total has valid data
Form IA 163	
Form IA 178	

Form IA 2220

Form IA 4136 C corp + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Income Tax Return is selected + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Franchise Tax Return is not selected + Tax Forms | States | Iowa | IA 4136 Motor Fuel Tax Credit | IA 4136 Motor Fuel Tax Credit | IA 4136, Page 2 | Line 7 has data

Form IA 4562A C corp + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Income Tax Return is selected + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Franchise Tax Return is not selected + (Return qualifies for bonus depreciation (See IA 4562A Instructions) OR Tax Forms | States | Iowa | IA 4562A | Part 1 Column A has data OR Tax Forms | States | Iowa | IA 4562A | Part 2 Column B has data OR Tax Forms | States | Iowa | IA 4562A | Part 3 Line 5 has data) + Organizer | States | Iowa | Return Options | Form 4562A Print suppression is not selected

Form IA 4562B C corp + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Income Tax Return is selected + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Franchise Tax Return is not selected + Tax Forms | States | Iowa | IA 4562B | Balance Exists + Organizer | States | Iowa | Return Options | Form 4562B Print suppression is not selected

Form IA 8453-C E-file is enabled

Form IA 8453-S S corp + E-file is enabled

Form IA 8864 C corp + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Income Tax Return is selected + Tax Forms | States | Iowa | Selected Options | Filing Type | Iowa Franchise Tax Return is not selected + Tax Forms | States | Iowa | IA 8864 Biodiesel Blended Fuel Tax Cr has valid data

Form IA 8882

Form IA PTEC

ItemizedFedSecurityIntSchedule

ItemizedOtherAdditionsSchedule

ItemizedOtherRcptsSchedule

ItemizedOtherReductionSchedule

ItemizedPshipRcptsSchedule

Schedule CC

Schedule D

Schedule DE

Schedule H	C corp + Tax Forms States Iowa Selected Options Filing Type Iowa Income Tax Return is selected + Tax Forms States Iowa Selected Options Filing Type Iowa Franchise Tax Return is not selected + Tax Forms States Iowa IA 1120-Corp. Income Tax Return IA 1120, Page 1 Step 2 Filing Status 2 or Filing Status 3 is selected
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Schedule IA 1139CAP

Schedule IJL

Schedule M

Iowa Financial

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

Form/Schedule

Requirement(s) to Print

Form 43-009	C corp + Tax Forms States Iowa Financial Selected Options Filing Type Iowa Franchise Tax Return is selected + (Organizer State Financial Iowa Financial Return Options Print tax payment voucher is selected + Organizer States Common State Print Options Print Suppression Suppression AL-ME EXT not selected for IA)
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Form FRAN ES	C corp + Tax Forms States Iowa Financial Selected Options Filing Type Iowa Franchise Tax Return is selected + Organizer States Common State Print Options Print Suppression Suppression AL-ME Est Tax for Iowa is not selected + Tax Forms States Iowa Financial FRAN ES-Estimated Tax Vouchers IA FRAN ES Installment 1 has data
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Form IA 101

Form IA 102

Form IA 1120F	C corp + Tax Forms States Iowa Financial Selected Options Filing Type Iowa Franchise Tax Return is selected
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Form IA 124

Form IA 148

Form IA 163

Form IA 2220	C corp + Tax Forms States Iowa Financial Selected Options Filing Type Iowa Franchise Tax Return is selected + Organizer States Common State Print Options Print Suppression Suppression AL-ME Und of Est Tax not selected for IA
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Form IA 4562A	C corp + Tax Forms States Iowa Financial Selected Options Filing Type Iowa Franchise Tax Return is selected + (Return qualifies for bonus depreciation (See IA 4562A Instructions) OR Tax Forms States Iowa IA 4562A Part 1 Column A has data OR Tax Forms States Iowa IA 4562A Part 2 Column B has data OR Tax Forms States Iowa IA 4562A Part 3 Line 5 has data) + Organizer States Iowa Return Options Form 4562A Print suppression is not selected
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Form IA 4562B

Form IA 8882

Schedule 59F C corp + Tax Forms | States | Iowa Financial | Selected Options | Filing Type | Iowa Franchise Tax Return is selected Tax Forms | States | Iowa Financial | IA Schedule 59F-Apport. Income to Iowa | Line 20 has data

Schedule CC

Schedule DE

Schedule IA 1139CAP

Kansas

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

Form/Schedule	Requirement(s) to Print
Form 200	Compute intangible income box is checked at Organizer States State Intangible Kansas Intangible Local Intangibles
Form AG	Form AR is checked at Organizer Common State General Information Basic Return Information Filing Status/State Filing Method + Question 13 of Form AR is checked "Yes
Form AR, Domestic/Foreign Annual Report	Form AR is checked at Organizer Common State General Information Basic Return Information Filing Status/State Filing Method
Form K-120	Compute Privilege Tax is not checked at Organizer States Kansas Privilege Tax
Form K-120AS	Return is not consolidated + Compute Privilege Tax is not checked at Organizer States Kansas Privilege Tax + Data exists on Line E of the form
Form K-120ES	Suppress compute and print option is not checked at Organizer States Kansas Overpayment and Estimate Options Estimated Tax + Organizer States Common State Print Suppression Suppression AL-ME/Kansas Est Tax is not checked + Estimated amounts are due
Form K-120EXC	Data exists on line 1 or 2 of the form
Form K-120EXS	
Form K-120S	Compute Privilege Tax is not checked at Organizer States Kansas Privilege Tax
Form K-120S AS	Compute Privilege Tax is not checked at Organizer States Kansas Privilege Tax + Data exists on Line E of the form or + Force print option is checked at Organizer States Kansas Return Options
Form K-120V	Payment amount exists on the tax form
Form K-130	Compute Privilege Tax is checked at Organizer States Kansas Privilege Tax
Form K-130AS	Return is not consolidated + Compute Privilege Tax is checked at Organizer States Kansas Privilege Tax + Data exists on Line E of the form
Form K-130ES	Suppress compute and print option is not checked at Organizer States Kansas Overpayment and Estimate Options Estimated Tax + Organizer States Common State Print Suppression Suppression AL-ME/Kansas Est Tax is not checked + Estimated amounts are due
Form K-130V	Payment amount exists on the tax form

Form K-34	Information has been entered at Organizer States Kansas Credits Business and Job Development Cr. Qualified Business Facility Parts A and B
Form K-40C	At least one shareholder is a non-resident
Form K-84	DOES NOT PRINT
Form K-85 (e-file only)	DOES NOT PRINT
Form PA, Professional Annual Report	Form PA is checked at Organizer Common State General Information Basic Return Information Filing Status/State Filing Method
Sch K 120EXCOMB	
Sch K 120EXPT	
Schedule K Equivalent (S Corp)	Organizer States Common State Print Suppression Suppression AL-ME/Kansas K-1 Equiv is not checked
Schedule K-1 Equivalent (S Corp)	Organizer States Common State Print Suppression Suppression AL-ME/Kansas K-1 Equiv is not checked + Shareholders exist + Suppress the of Schedule K-1 Equivalent is not checked at Organizer States Kansas Shareholder Information
Schedule K-121	The return is marked as combine at Organizer States State and City Activation/Consolidation + the return is marked as either top consolidation or sub consolidation at Organizer States State and City Activation/Consolidation
Schedule K-131	The return is marked as Privilege at Organizer States Kansas Privilege + the return is marked as combine at Organizer States State and City Activation/Consolidation + the return is marked as either top consolidation or sub consolidation at Organizer States State and City Activation/Consolidation
Schedule K-220	Organizer States Common State Print Suppression Suppression AL-ME/Kansas Underpayment of estimated tax is not checked + Option 4 is not checked at Organizer States Kansas Underpayment Options
Schedule K-230	Organizer States Common State Print Suppression Suppression AL-ME/Kansas Underpayment of estimated tax is not checked + Option 4 is not checked at Organizer States Kansas Underpayment Options + The return is marked as Privilege at Organizer States Kansas Privilege

Kentucky

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

Form/Schedule

Requirement(s) to Print

Form 2220-K	Kentucky is not suppressed on Organizer States Common State Print Suppression, Suppress AL-ME, "Kentucky", "Under of Est Tax" checkbox + Not Underpayment Option 4 selected for Kentucky from Organizer States Kentucky Underpayment Options, "Option to compute and print Underpayment Penalty
Form 4562 (KY)	Kentucky Form 4562 is not suppressed from organizer States Kentucky Return Option Print Suppression + State adjustment option " Suppress the flow of federal and Kentucky Form 4562 amounts to return" check box is not selected from Organizer States Kentucky State Adjustment screen.

Form 720	C Corp + Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox
Form 720-ES	Organizer States Common State Print Suppression, Suppress AL-ME, "Kentucky", "Est Tax" checkbox + Not Underpayment Option 4 selected for Kentucky from Organizer States Kentucky Underpayment Options, "Option to compute and print Underpayment Penalty
Form 720EXT	
Form 720U	Nnot suppressed on Organizer States Common State Print Suppression, Suppress AL-ME, "Kentucky", "Ext Tax" checkbox + Kentucky Financial is active from Organizer State Financial Kentucky Financial General Information + one of the following has to be Yes: There is tentative tax payment for Kentucky Financial Tax due from OR Kentucky Financial return is on Extension and force print all states' extension form option has been selected.
Form 722	Financial
Form 740NP-WH	S Corp + Kentucky 740NP is not suppressed from organizer States Kentucky Return Option Print Suppression + There is amount on line 1 of form 740NP-WH, from Tax Forms States Kentucky 740NP-WH
Form 740NP-WH-ES	
Form 740NP-WH-EXT	
Form 740NP-WH-V	
Form 740-PTET	
Form 740-PTET ELECT	
Form 740-PTET-ES	
Form 740-PTET-EXT	
Form 8810(KY)	
Form 8879(C)-K	Organizer States Common State Print Suppression, Suppress AL-ME, "Kentucky", "Ext Tax" checkbox + one of following has to be Yes: Not Underpayment Option 4 selected for Kentucky from Organizer States Kentucky Underpayment Options, "Option to compute and print Underpayment Penalty OR Kentucky Financial return is on Extension and force print all states' extension form option has been selected.
Form 8948 (K-C)	Financial + Form 73A800 print is not suppressed from Organizer State Financial Kentucky Financial Return Option Suppress Print, Form 73A800 checkbox.
Form KBR-V	E-filing + There is a payment amount on line 5 from Tax Forms States Kentucky 720-V
Form KPTET-V	
Form PTE (S Corp)	S Corp
Form PTE(K)	
Form PTET-CR	

Form PTE-WH	Input form for KY e-file if there is amount on line 7 of Form 720, Part I
Form4797K	
Form720U	
Form722	
Form740NPWH	
Form740PTET	
Form8810K	
FormPTE	
FormPTEK	
FormPTETCR	
FormPTETELECT	
SchDE	
SchDK	
SchDS	
Schedule 851-K	C Corp + Kentucky 851-K is not suppressed from organizer States Kentucky Return Option Print Suppression + Kentucky is filling a Combined return
Schedule A	Schedule A is not suppressed from organizer States Kentucky Return Option Print Suppression
Schedule A-N	Schedule A is not suppressed from organizer States Kentucky Return Option Print Suppression + Schedule A-C checkbox is checked from Tax Forms States Kentucky Sch. A Apportionment and Allocation 720-Schedule A, section before Section I. + There is any amount on Schedule A-C from Tax Forms States Kentucky Sch. A Apportionment and Allocation Schedule A-C
Schedule BIO	
Schedule CCI	
Schedule COGS	Sch COGS is not suppressed from organizer States Kentucky Return Option Print Suppression + one of the following has to be Yes: Schedule LLET is calculated based on Gross Profit from Tax Forms States Kentucky Form 720/720S, Section B. OR Force print Schedule COGS from organizer States Kentucky Kentucky Cost of Good Sold, "Force print Schedule COGS" check box is selected.
Schedule CR	C Corp + Kentucky Schedule CR is not suppressed from organizer States Kentucky Return Option Print Suppression + Kentucky is filling a Combined return
Schedule DE	C Corp + Kentucky 8903-K is not suppressed from organizer States Kentucky Return Option Print Suppression + There is any amount on form 8903-K

Schedule DS	Kentucky is active in the return from : Organizer States State and City Activation State and City Activation with 1120S "Return Type + Kentucky S Corp has been released + Kentucky is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Kentucky" checkbox + one of the following has to be Yes: There is amount on line 7 of Schedule O-PTE from Tax Forms States Kentucky Schedule O-PTE, Part I OR There is amount on line 11 of Schedule O-720 from Tax Forms States Kentucky Schedule O-PTE, Part II
Schedule ETH	Schedule LLET is not suppressed from organizer States Kentucky Return Option Print Suppression + LLET tax is filed and there is NO reason code input from Tax Form States Kentucky Form 720/720S, Section B
Schedule INV	S Corp + Kentucky PTE-WH is not suppressed from organizer States Kentucky Return Option Print Suppression + For each Nonresident shareholder there is a shareholder name + There is amount on line 6 of Form PTE-WH from Tax Forms States Kentucky PTE-WH, Nonresident Withholding PTE-WH Nonresident Withholding
Schedule K-1 (S Corp)	S Corp + For every shareholder, name is not blank.
Schedule KBI	
Schedule KBI-T	
Schedule KCR	C Corp + Schedule KCR is not suppressed from organizer States Kentucky Return Option Print Suppression + filling a Combined return
Schedule KCR (Sub Detail)	C Corp + Kentucky KCR is not suppressed from organizer States Kentucky Return Option Print Suppression + Kentucky is filling a Combined return
Schedule KIDA	Schedule KIDA is not suppressed from organizer States Kentucky Return Option Print Suppression + There is any KIDA project defined from Organizer States Kentucky Credits Economic Development Projects - KIDA
Schedule KIDA-T	Schedule KIDA is not suppressed from organizer States Kentucky Return Option Print Suppression + There is any KIDA project defined from Organizer States Kentucky Credits Economic Development Projects - KIDA
Schedule KIRA	
Schedule KIRA-T	
Schedule KJDA	
Schedule KJDA-T	
Schedule KRA	
Schedule KRA-T	
Schedule KREDA	Schedule KREDA is not suppressed from organizer States Kentucky Return Option Print Suppression + There is any KREDA project defined from Organizer States Kentucky Credits Economic Development Projects - KIDA
Schedule KREDA-T	Schedule KREDA is not suppressed from organizer States Kentucky Return Option Print Suppression + There is any KREDA project defined from Organizer States Kentucky Credits Economic Development Projects - KIDA

Schedule L-C	Schedule LLET is not suppressed from organizer States Kentucky Return Option Print Suppression + LLET tax is filed and there is NO reason code input from Tax Form States Kentucky Form 720/720S, Section B + LLET-C is selected to be attached from Tax Forms States Kentucky Schedule LLET, checkbox before Section A + There is amount on line 1 of Schedule LLET, section D, from Tax Form States Kentucky Schedule LLET, Section D
Schedule L-ECON	
Schedule NOL	C Corp + For Combined return, one of the following has to be Yes: (There is amount on line 6 from Tax Forms States Kentucky Schedule NOL Part I, Section A OR There is amount on line 7 from Tax Forms States Kentucky Schedule NOL Part I, Section A OR There is amount on line 3 from Tax Forms States Kentucky Schedule NOL Part I, Section B) + For Single Return, one of the following has to be Yes: (There is amount on line 3 from Tax Forms States Kentucky Schedule NOL Part II OR There is amount on line 4 from Tax Forms States Kentucky Schedule NOL Part II)
Schedule QR	C Corp + one of the following has to be Yes: (There is amount on line 14 of Schedule O-720 from Tax Forms States Kentucky Schedule O-720, Part I OR There is amount on line 20 of Schedule O-720 from Tax Forms States Kentucky Schedule O-720, Part II)
Schedule RC	Schedule A is not suppressed from organizer States Kentucky Return Option Print Suppression + Schedule A-N checkbox is checked from Tax Forms States Kentucky Sch. A Apportionment and Allocation 720-Schedule A, section before Section I.
Schedule RPC	Schedule RPC is not suppressed from organizer States Kentucky Return Option Print Suppression + one of the following has to be Yes: Form is forced to print from Organizer States Kentucky Related Party Expense, " Force print Schedule RPC" checkbox. OR There is amount on line 1 from Tax Forms States Kentucky Schedule RPC Part II, Section B OR Question 7 of Form 720, Schedule Q answered Yes, Tax Forms States Kentucky Form 720 Page 3 OR Question 7 of Form 720S, Schedule Q answered Yes, Tax Forms States Kentucky Form 720S Page 3 OR There is amount on line 4 from Tax Forms States Kentucky 720S Part III OR There is amount on line 6 from Tax Forms States Kentucky 720 Part III
Schedule TCS	Schedule TCS is not suppressed from organizer States Kentucky Return Option Print Suppression + For C Corp return, one of the following has to be Yes: There is amount on line 5 from Tax Forms States Kentucky Form 720 Part I OR There is amount on line 7 from Tax Forms States Kentucky Form 720 Part II + For S Corp Return, one of the following has to be Yes: There is amount on line 5 from Tax Forms States Kentucky Form 720S Part I
SchETH	
SchINV	
SchKBI	
SchKBIT	
SchKJDA	

SchKJDAT

SchKRA

SchKRAT

SchLC

SchPTEK1

SchPTEK1S

SchQR

SchRC

SchU1

SchU10

SchU2

SchU3

SchU4

SchU5

SchU6

SchU7

SchU8

SchU9

Kentucky Cities: Ashland

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

Form/Schedule

Requirement(s) to Print

Net Profit License Fee Return	Ashland city is activated on the State and City Activation Organizer + KY State is activated
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Kentucky Cities: Bardstown

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

Form/Schedule

Requirement(s) to Print

Net Profit License Fee Return	Bardstown city is activated on the State and City Activation Organizer + KY State is activated
Occupational License Tax Return	Bardstown city is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Bowling Green

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

Form/Schedule

Requirement(s) to Print

Net Profit Extension	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression KY Cities- for the third column "Extension" Bowling Green
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Net Profit License Fee Return	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression KY Cities- for the first column "State Forms" Bowling Green
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Kentucky Cities: Campbell County-Alexandria

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

Form/Schedule	Requirement(s) to Print
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Occupational License Tax
Return

Kentucky Cities: Campbell County-Cold Spring

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

Form/Schedule	Requirement(s) to Print
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Occupational License Tax
Return

Kentucky Cities: Campbell County-Fort Thomas

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

Form/Schedule	Requirement(s) to Print
---------------	-------------------------

Occupational License Tax
Return

Kentucky Cities: Campbell County-Highland Heights

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

Form/Schedule	Requirement(s) to Print
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Occupational License Tax
Return

Kentucky Cities: Campbell County-Melbourne

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

Form/Schedule	Requirement(s) to Print
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Occupational License Tax
Return

Kentucky Cities: Campbell County-Southgate

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

Form/Schedule	Requirement(s) to Print
---------------	-------------------------

Occupational License Tax
Return

Kentucky Cities: Campbell County-Woodlawn

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

Form/Schedule

Requirement(s) to Print

Occupational License Tax
Return

Kentucky Cities: Common form OL-D

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

Form/Schedule

Requirement(s) to Print

Occupational License Tax
Return

Kentucky Cities: Common form OL-S

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

Form/Schedule

Requirement(s) to Print

Occupational License Tax
Return

Kentucky Cities: Elizabethtown

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

Form/Schedule

Requirement(s) to Print

Net Profit License Fee Return Elizabethtown city is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Frankfort

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

Form/Schedule

Requirement(s) to Print

Net Profit License Fee Return Frankfort city is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Hopkinsville

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

Form/Schedule

Requirement(s) to Print

Net Profit License Fee Return Hopkinsville city is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Kenton County and Cities

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

Form/Schedule

Requirement(s) to Print

Annual Occupational Fee and Business License Renewal Return Kenton county is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Kenton County- Bromley
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and Business License Renewal Return

Kentucky Cities: Kenton County- Crescent Springs
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and Business License Renewal Return Crescent Springs is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Kenton County- Crestview Hills
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and Business License Renewal Return Kenton county is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Kenton County- Edgewood
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and Business License Renewal Return Campbell county is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Kenton County- Elsmere
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and Business License Renewal Return Elsmere/Kenton County is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Kenton County-Erlanger
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Fort Mitchell
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Fort Wright
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Independence
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Lakeside Park
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Ludlow
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Park Hills
(Jurisdiction must be activated and released for forms/schedules to pri

Form/Schedule Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Ryland Heights

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

Form/Schedule

Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Taylor Mill

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

Form/Schedule

Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Kenton County-Villa Hills

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

Form/Schedule

Requirement(s) to Print

Annual Occupational Fee and
Business License Renewal
Return

Kentucky Cities: Lexington

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

Form/Schedule

Requirement(s) to Print

Form 228

Not suppressed in Organizer | States| Common State| Print Options | Print
Suppression | Suppression KY Cities - for the first column "State Forms" Lexington

Form 228 ENP

Suppress print not selected in Organizer | States| Common State| Print Options |
Print Suppression | Suppression KY Cities - for the first column "State Forms"
Lexington + Suppress print not selected in Organizer | States| Common State|
Print Options | Print Suppression | Suppression KY Cities - for the second column
"Est Tax" Lexington + Valid estimate options selected in Organizer | States |
Common State | Tax Estimate Options | Estimated Tax Options + Organizer | Cities
| Lexington, KY | Overpayment and Estimate Options | Estimated Tax | Compute
and Print Options | Suppress print if no payments are due after applying
overpayment is not marked

Form 228EXT

Not suppressed in Organizer | States| Common State| Print Options | Print
Suppression | Suppression KY Cities - for the third column "Extension" Lexington

Form 228S	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression KY Cities - for the first column "State Forms" Lexington + Organizer Cities Lexington, KY General Information - Check box To indicate Board Education Return (Mandatory for Form 228S)
Form 228-S EXT	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression KY Cities - for the third column "Extension" Lexington + If on extension Organizer Cities Lexington Extension Information Fayette County Net Profit Extension Request section Return is on extension

Kentucky Cities: Louisville

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

Form/Schedule	Requirement(s) to Print
Form OL-3	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression KY Cities - for the first column "State Forms" Louisville
Form OL-3D	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression KY Cities - for the first column "State Forms" Louisville + Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression KY Cities - for the second column "Est Tax" Louisville + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Organizer Cities Louisville, KY Overpayment and Estimate Options Estimated Tax Compute and Print Options Suppress print if no payments are due after applying overpayment is not marked
Form OL-3EXT	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression KY Cities - for the first column "State Forms" Louisville + Organizer States Common State Print Options Print Suppression Suppression KY Cities- for the first column "State Forms" Louisville tab Ext is not selected for Louisville + Selected the Louisville "On Extension" under Organizer States Common State Estimates and Extensions and on the first tab "Extension

OL-3MO

Kentucky Cities: Madisonville

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

Form/Schedule	Requirement(s) to Print
Net Profit License Fee Return	Madisonville city is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Nelson County

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

Form/Schedule	Requirement(s) to Print
Occupational License Fee Return on Net Profit	Nelson county is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Paintsville

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

Form/Schedule

Requirement(s) to Print

Occupational License Tax
Return

Paintsville city is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Prestonsburg

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

Form/Schedule

Requirement(s) to Print

Occupational License Tax
Return

Prestonburg city is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Pulaski County

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

Form/Schedule

Requirement(s) to Print

Form NP-100

Pulaski county is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Richmond

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

Form/Schedule

Requirement(s) to Print

Form 2 Net Profit License Fee

Suppress print not selected in Organizer | States| Common State| Print Options | Print Suppression | Suppression KY Cities- - for the first column "State Forms" Richmond

Kentucky Cities: Russell

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

Form/Schedule

Requirement(s) to Print

Net Business Profits License
Free Return

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

Warren county is activated on the State and City Activation Organizer + KY State is activated

Kentucky Cities: Whitely County

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

Form/Schedule

Requirement(s) to Print

Whitely County Net Profit
License Fee Return

Whitely county is activated on the State and City Activation Organizer + KY State
is activated

Louisiana

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

Form/Schedule	Requirement(s) to Print
Form 620ES	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation + If amount due is entered
Form CIFT- 620EXT-V	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation + If amount due is entered
Form CIFT-620	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-Corp
Form CIFT-620ES	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule A	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corporation + If name and percentage owned is entered
Schedule B	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression L-ME + C-corporation or S-corporation + Details will print if no apportionment overrides are entered.
Schedule C	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule D	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule E	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule F	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule G	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule G1	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule H	
Schedule I	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered

Schedule J & J1

Schedule K	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule L	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule M	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule NRC	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered
Schedule RC	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression AL-ME + C-corporation or S-corp + If amount due is entered

Maine

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

Form/Schedule

Requirement(s) to Print

Form 1120 B-ES/ME, Vouchers	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + Maine is not suppressed on Est Tax checkbox at Organizer States Common State Print Options Print Suppression Suppression AL-ME + If Franchise under Organizer States Maine Return Options Activate the Franchise Return + One of the following has to be Yes: (Amount on "Total Estimate" line on "Installment Amount" column under Tax Forms States Maine 1120ES-ME Estimated Tax Vouchers 1120ES-ME Voucher 1 Amount of Payment hyperlink OR Amount on "Total Estimate" line on "Payment Due" column under Tax Forms States Maine 1120ES-ME Estimated Tax Vouchers 1120ES-ME Voucher 1 Amount of Payment hyperlink)
Form 1120 B-ME	If Franchise under Organizer States Maine Return Options Activate the Franchise Return + Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + Form 1120B-ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120B-ME" checkbox
Form 1120 B-ME, Sch.CRB	If Franchise under Organizer States Maine Return Options Activate the Franchise Return + Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + Form 1120B-ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120B-ME" checkbox

Form 1120ES-ME, Vouchers	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + Maine is not suppressed on Est Tax checkbox at Organizer States Common State Print Options Print Suppression Suppression AL-ME + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + One of the following has to be Yes: (Amount on "Total Estimate" line on "Installment Amount" column under Tax Forms States Maine 1120ES-ME Estimated Tax Vouchers 1120ES-ME Voucher 1 Amount of Payment hyperlink OR Amount on "Total Estimate" line on "Payment Due" column under Tax Forms States Maine 1120ES-ME Estimated Tax Vouchers 1120ES-ME Voucher 1 Amount of Payment hyperlink)
Form 1120EXT-ME	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + Maine is not suppressed on Ext checkbox at Organizer States Common State Print Options Print Suppression Suppression AL-ME
Form 1120-ME	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 1120ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120ME" checkbox
Form 1120-ME, Schedule CR	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If Combined Return under on Tax Forms States Maine 1120ME-Corporate Income Tax Return 1120ME, Page 1 tab Amended Return checkbox
Form 1120-ME-PV	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + Amount on "Amount due" line on Tax Forms States Maine Form 1120ME-PV
Form 1120X-ME	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 1120ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120ME" checkbox + Amount on Col B of Sch X on Tax Forms States Maine 1120ME-Corporate Income Tax Return 1120ME, Page 7 tab View Schedule X Detail hyperlink
Form 2220-ME	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + Maine is not suppressed on Und of Est Tax checkbox at Organizer States Common State Print Options Print Suppression Suppression AL-ME + One of the following has to be Yes: (If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type OR If Franchise under Organizer States Maine Return Options Activate the Franchise Return) + 2220ME is not suppressed at Organizer States Maine Underpayment Options Option to Compute and Print Underpayment Penalty Suppress penalty computation and do not print form button

Form 941P, Page 1	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 941P-ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 941P-ME" checkbox
Form 941P, Schedule 2, Page 2	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 941P-ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 941P-ME" checkbox + Amount on Col 10 on Tax Forms States Maine 941P-ME Pass-Through Entity Return 941P-ME Pg 2 tab View 941P Page 2 Detail hyperlink
Form 941P, Schedule 3, Page 3	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 941P-ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 941P-ME" checkbox + Name on Col 13 on Tax Forms States Maine 941P-ME Pass-Through Entity Return 941P-ME Pg 3 tab View 941P Page 3 Detail hyperlink + One of the following has to be Yes: (X exists on Col 17 "Composite Taxpayer Exemption" of Tax Forms States Maine 941P-ME Pass-Through Entity Return 941P-ME Pg 3 tab View 941P Page 3 Detail hyperlink OR X exists on Col 17 "Compliant Taxpayer Exemption" of Tax Forms States Maine 941P-ME Pass-Through Entity Return 941P-ME Pg 3 tab View 941P Page 3 Detail hyperlink OR X exists on Col 17 "Approved Request Exemption" of Tax Forms States Maine 941P-ME Pass-Through Entity Return 941P-ME Pg 3 tab View 941P Page 3 Detail hyperlink)
Form CR	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If Combined Return under on Tax Forms States Maine 1120ME-Corporate Income Tax Return 1120ME, Page 1 tab Amended Return checkbox
Form ME Composite	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + If Composite under Organizer States Maine Return Options Activate the Composite Return
Form1099ME	
Sch1A	
Sch1S	
Schedule A	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 1120ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120ME" checkbox + Amount on Sch A Ln 1c is less than 1.000000 on Tax Forms States Maine 1120ME-Corporate Income Tax Return 1120ME, Page 4 tab

Schedule B	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 1120ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120ME" checkbox
Schedule C	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 1120ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120ME" checkbox
Schedule D	Maine is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Maine" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Form 1120ME is not suppressed on Organizer States Maine Return Options Print Suppression, "Form 1120ME" checkbox
SchNOL	
SchX	
Wks2220	
WksCarryFwdSuperRDCred	
WksFamAndMedLeaveCred	
WksHistoricRehabCred	
WksMECapInvCred	
WksMinTaxCred	
WksPTDevZoneCred	
WksSeedCapCred	
WksWellnessProgCred	

Maryland

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

Form/Schedule	Requirement(s) to Print
511 (S Corp.)	
Form 500	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + C-Corporation (Page 1 can print for S-Corporation).
Form 500 CR	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + C or S Corporation + There must be credit data entered on the tax form.

Form 500D	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Entity is C or S Corporation. Cannot be a franchise return. + (Amounts are entered in Organizer States Common State Tax Estimate Options Estimated Tax Payments Tab. OR Amounts are entered in Organizer States Maryland Overpayment and Estimate Options Estimated Corporation Tax tab.) + Print is not suppressed in Organizer States Maryland Overpayment and Estimate Options Estimated Corporation Tax tab.
Form 500DM	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + (Force print is selected in Organizer States Maryland Return Options. OR There is data on line 1 columns 1-3 in Tax Forms States Maryland 500DM-Decoupling Modification. OR There is data on line 2 columns 1-3 in Tax Forms States Maryland 500DM-Decoupling Modification. OR There is data entered in Tax Forms States Maryland 500DM-Decoupling Modifications line 5 drill down. OR There is an amount on line 7 in Tax Forms States Maryland 500DM-Decoupling Modification.)
Form 500E	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + The return is marked on extension in Organizer States Common State General Information Basic Return Information spreadsheet Return Information tab.
Form 500UP	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + (The first option is selected in Organizer States Maryland Underpayment Options AND there is an amount in Tax Forms States Maryland 500UP - Underpayment of Est Income Tax. OR The second or third option is selected in Organizer States Maryland Underpayment Options.) + Print is not suppressed with the fourth option in Organizer States Maryland Underpayment Options.
Form 502E	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + A shareholder is marked as composite in Organizer Shareholder Information Shareholder Data Shareholder Information State Shareholder Information tab. + An amount of tax paid with the extension needs to be present in Tax Forms States Maryland 502E - Composite Extension.
Form 502S	
Form 510 (S Corp)	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + S-Corporation.
Form 510D (S Corp)	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Entity is S Corporation. + (Amounts are entered in Organizer States Common State Tax Estimate Options Estimated Tax Payments Tab. OR Amounts are entered in Organizer States Maryland Overpayment and Estimate Options Estimated Pass-through Tax tab.) + Print is not suppressed in Organizer States Maryland Overpayment and Estimate Options Estimated Pass-through Tax tab.
Form 510-E	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + There is an amount on line 3 for Form 510-E in Tax Forms States Maryland 510E - Ext. of Time to File Pass-Through.

Form EL101B, Declaration for E-filing	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + E-file is enabled. + Print is not suppressed in Organizer States Maryland Return Options.
Form EL102B Voucher	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + E-file is enabled. + Print is not suppressed in Organizer States Maryland Return Options + There is amount paid with this voucher in Tax Forms States Maryland EL 102B Voucher.
Schedule K-1	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + The shareholder's name needs to be entered in Organizer Shareholder Information Shareholder Data Shareholder Information

Massachusetts

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

Form/Schedule	Requirement(s) to Print
Domestic & Foreign Annual Reports	Print annual report checked on Organizer State Annual Report Massachusetts Annual Report Annual Report
Form 355	C Corporation has a X on Tax Forms States Massachusetts Selected Options Filing Type + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + (Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information)
Form 355-7004	On extension checked on spreadsheet Organizer States Common State Estimates and Extensions + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Suppressed not checked on Organizer States Common State Print Options Print Suppression Suppression AL-ME
Form 355-7004-MISC	On extension checked on spreadsheet Organizer States Common State Estimates and Extensions + Financial Institution is checked on Tax Forms States Massachusetts Selected Options Filing Type + Suppressed not checked on Organizer States Common State Print Options Print Suppression Suppression AL-ME
Form 355-ES	Voucher has an amount and Estimates not suppressed
Form 355-PV	Voucher has amount + C Corporation has a X on Tax Forms States Massachusetts Selected Options Filing Type + No Direct Debit
Form 355Q	Print Form 355Q checked on Organizer States Massachusetts Manufacturing Statement Manufacturing Activities
Form 355S	S Corporation has a X on Tax Forms States Massachusetts Selected Options Filing Type + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type

Form 355S-PV	Voucher has amount + S Corporation has a X on Tax Forms States Massachusetts Selected Options Filing Type +No Direct Debit
Form 355U	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type
Form 63 FI	Financial Institution populated on Tax Forms States Massachusetts Selected Options Filing Type
Form AA-1	"Reasons for Alternative Apportionment Request" or " Alternative Method Requested" entered on Organizer States Massachusetts Alternate Apportionment
Form CRFS	Composite enabled on Organizer States Massachusetts Composite Information
Form EDIP	Amount in Part 1
Form M-2220	Add penalty to tax and print form, if required selected on Organizer States Massachusetts Underpayment Options + Line 35 has amount + Not suppressed + Override blank on Organizer States Massachusetts Underpayment Options
Form M-8453C	E-file enabled
Form M-8453CR	Composite enabled on Organizer States Massachusetts Composite Information
Form MA-NRCR	Composite enabled on Organizer States Massachusetts Composite Information
Schedule ABI	Total Exceptions Claimed Line 4 has an amount
Schedule ABIE	Total Exceptions Claimed Line 5 has an amount
Schedule B	Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + (Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information OR (Combined checked and Marked taxable on Organizer States Massachusetts Combined Return Information)
Schedule C	(Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + (Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information) OR (Combined checked and Marked taxable on Organizer States Massachusetts Combined Return Information)

Schedule CG	Top consolidation has X on Tax Forms States Massachusetts Selected Options Filing Type + (Combined checked on Organizer States Massachusetts Combined Return Information)
Schedule CIR	Top consolidation has X on Tax Forms States Massachusetts Selected Options Filing Type + (Combined checked on Organizer States Massachusetts Combined Return Information)
Schedule D	(Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + (Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information) OR (Combined checked and Marked taxable on Organizer States Massachusetts Combined Return Information)
Schedule DRE	Added on Organizer States Massachusetts Disregarded Entities
Schedule E	Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information
Schedule E-1	Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information
Schedule EOA	Line 9 or Line 14 has an amount
Schedule F	Form has data + (Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + (Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information) OR (Combined checked and Marked taxable on Organizer States Massachusetts Combined Return Information)
Schedule FE	Form has data
Schedule H	Line 6 has amount
Schedule HM	Line 1, Line 23 or Line 24 has an amount

Schedule HRC	Project entered on Organizer States Massachusetts General Credits Historic Rehabilitation Historic Rehabilitation Projects
Schedule HRC-A	Recipient not check on Organizer States Massachusetts General Credits Historic Rehabilitation Historic Rehabilitation Projects
Schedule HRC-IC	Project entered on Organizer States Massachusetts General Credits Historic Rehabilitation Historic Rehabilitation Projects
Schedule HRC-T	Entered on Organizer States Massachusetts General Credits Historic Rehabilitation Historic Rehabilitation Projects [project name] Certificate Information [allotment recipient]
Schedule LHC-A	Recipient not checked on Organizer States Massachusetts General Credits Low-Income Housing Low-Income Housing Projects
Schedule LHC-C	Entered on Organizer States Massachusetts General Credits Low-Income Housing Low-Income Housing Projects
Schedule LHC-EE	Early Election date entered on Organizer States Massachusetts General Credits Low-Income Housing Low-Income Housing Projects
Schedule LHC-T	Organizer States Massachusetts General Credits Historic Rehabilitation Historic Rehabilitation Projects [project name] Certificate Information [allotment recipient]
Schedule LIHC	Entered on Organizer States Massachusetts General Credits Low-Income Housing Low-Income Housing Projects
Schedule M-1	(Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Top consolidation is blank on Tax Forms States Massachusetts Selected Options Filing Type + (Combined not checked or Member has a different tax year than the combined group checked on Organizer States Massachusetts Combined Return Information)
Schedule NOL	Line 4 has an amount
Schedule RC	Simple Method Checked or MA Gross Receipts checked or Part 2, line 13 has amount or Part 3, line 22 has amount
Schedule RFC	Added on Organizer States Massachusetts General Credits Refundable Film Credit
Schedule RLC	Line 5 or Line 6 have amounts
Schedule RNW	Use RNW checked Organizer States Massachusetts Balance Sheet
Schedule S (S Corp)	S Corporation has a X on Tax Forms States Massachusetts Selected Options Filing Type
Schedule SK-1 (S Corp)	S Corporation has a X on Tax Forms States Massachusetts Selected Options Filing Type + Shareholders entered
Schedule TDS	Entered on Organizer States Massachusetts Sch TDS 5
Schedule TTP	Topcon is blank on Tax Forms States Massachusetts Selected Options Filing Type + Form has data

Schedule U-CI	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type
Schedule U-CS	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Line 2 has an amount
Schedule U-E	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type
Schedule U-IC	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Marked taxable on Organizer States Massachusetts Combined Return Information + Form has data
Schedule U-INS	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type
Schedule U-M	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type
Schedule U-MSI	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Marked taxable against income on Organizer States Massachusetts Combined Return Information
Schedule U-MTI	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type +
Schedule U-NOLS	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + line 24 has amount

Schedule U-ST	Filing combined Forms 355U checked on Organizer States Massachusetts Combined Return Information + Financial Institution is blank on Tax Forms States Massachusetts Selected Options Filing Type + Security corporation is blank on Tax Forms States Massachusetts Selected Options Filing Type + Marked taxable on Organizer States Massachusetts Combined Return Information
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Schedule VP	Line 4 has an amount
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Michigan

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

Form/Schedule	Requirement(s) to Print
Form 3581	Qualified expenditure amount exists on line 3 of the form
Form 4	Payment amount exists on line 13 of the tax form.
Form 4567	Michigan is activated on the State and City Activation Organizer +MBT Annual Return selected in Organizer States Michigan General Information
Form 4568	Total Nonrefundable Credits exists on line 40 of the form
Form 4569	Amount exists for Brownfield Credit line 10 or Historic Preservation Credit line 3 on the form
Form 4570	A compensation credit exists on lines 26, 27, 35, 36, 37, 38, 40 or 42 of the form.
Form 4571	Amount exists on line 10,13,19,21 or 27 of the form
Form 4572	Amount exists on line 5,9,14 or 19 of the form
Form 4573	Amount exists on line 3,7,11,14,one of the miscellaneous credits on the form
Form 4574	Amount exists on line 16,19,27,29,33,37,41,43,50,54,56,65,75,77,79 or 81 of the form.
Form 4575	Amount exits on any line 10 through 16 or Compute MBT loss adjustment for the small business alternative credit on Form 4575 is selected at Organizer States Michigan Return Options Compute Options
Form 4576	Payment amount exists on the tax form
Form 4577	Name of shareholder exists in Part 1 line 1 of the form
Form 4578	Name of partner exists on line 1, column A of the form
Form 4579	Gain exists on Part 3, line 1 of the form
Form 4580	Michigan is activated on the State and City Activation Organizer +MBT Annual Return selected in Organizer States Michigan General Information +Top Consolidation selected on State and City Activation/Consolidation spreadsheet
Form 4581	Certification on Part 3, line 18 is checked at Organizer States Michigan Other State Forms MBT Protection under PL 86-272
Form 4582	Total penalty and interest, line 38 is populated.
Form 4584	Total credit carry forward line is populated for any of the credits on form
Form 4585	Entity is not a top consolidation and recapture amount exists on page 2, line 7
Form 4587	Total recapture, line 13 is populated.

Form 4588	Must be an insurance federal return 1120L or 1120PC +C Corporation selected on State and City Activation/Consolidation spreadsheet, Insurance column
Form 4590	Michigan is activated on the State and City Activation Organizer + Organizer States State and City Activation Entity Type, select MBT Financial
Form 4594	Eligible for Farmland Preservation Credit Organizer States Michigan Credits Farmland Preservation Credit
Form 4595	Eligible for Renaissance Zone Credit Organizer States Michigan Credits Renaissance Zone Credit + Property information is complete
Form 4596	Must be insurance return + Amount on line 28 exists
Form 4700	Amount on page 4, line 75 exists + not suppressed
Form 4746	Amount on line 10, 17 or 25 exists + not suppressed
Form 4752	Amount on line 6, 10, 15 or 20 exists + not suppressed
Form 4891	Michigan is activated on the State and City Activation Organizer
Form 4892	Michigan is activated on the State and City Activation Organizer + Organizer States Michigan Amended Return
Form 4893	Must be CIT Annual return or amended CIT return and line 11,12,14 or 18 must be populated
Form 4894	Officer or shareholder name is present
Form 4895	Information is present in Part 2
Form 4896	Must be CIT Annual return and a topcon +Name of member must be present
Form 4897	Michigan is activated on the State and City Activation Organizer + Top Consolidation selected on State and City Activation/Consolidation spreadsheet
Form 4898	Flow through entity name must be present in column A
Form 4899	Line 38 must exist and form not be suppressed
Form 4900	Flow through entity name must be present in column B
Form 4902	Line 20, Total recapture tax must exist
Form 4903	Entity name must exist in column A
Form 4905	Michigan is activated on the State and City Activation Organizer + Must be an insurance federal return 1120L or 1120PC + C Corporation selected on State and City Activation/Consolidation spreadsheet, Insurance column
Form 4906	Must be an insurance return + Amended return activated at Organizer States Michigan Amended Return Activate Amended Insurance Return checkbox
Form 4908	Must be a CIT financial return +Organizer States State and City Activation Entity Type, select CIT Financial
Form 4909	Must be a CIT financial return +amended return activated at Organizer States Michigan Amended Return Activate Amended Financial Return checkbox

Form 4910	Top Consolidation selected on State and City Activation/Consolidation spreadsheet +Must be unitary financial business group and parent name and member name must be populated.
Form 4911	Flow through entity name must be present in column A
Form 4913	Payment amount exists on the tax form
Form 4917	Payment amount exists on the tax form line 4
Form 4918	Organizer States Michigan Flow-Through Withholding Activate Flow-Through Withholding Return checkbox
Form 4919	Line 5 on form must exist
Form 4920	Name of corporation opting out must be present
Form 4946	Line 39 on form must exist
Form 4947	Line 11, 28 or 39 must be present on the form
Form 4974	Must be insurance return and line 20 must be populated.
Form 4975	Must be insurance return and line 16 or 17 must be present on the form
Form 5793	
Form 807	Organizer States Michigan Composite Return Compute and print the Michigan Composite Return

Michigan Cities

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

Form/Schedule

Requirement(s) to Print

Form 4586

Michigan Cities: Common Forms

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

Form/Schedule

Requirement(s) to Print

Form CF-1120

Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" Michigan Cities + Option to suppress is not selected Organizer | Cities | Michigan Cites Common Form | Michigan Common Form City "City Name" | Return Options - print suppress of City forms

Form CF-1120ES Voucher	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities + Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the second column "Est Tax" Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of Estimated tax vouchers
Form CF-1120ES-EFT Voucher with EFT Payment	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities + Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the second column "Est Tax" Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of Estimated tax vouchers + Option to elect EFT payment under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Overpayment and Estimate Options - second tab "Estimate Options" select the "Filing by EFT" checkbox and also be a city that allows to file by EFT - look at the same screen and it indicates if the city allows to file by EFT - look at the "Information only:" not to have text that says the city does not allow for it .
Form CF-1120PV Return Payment Voucher	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + amount of payment due on the form + Option to elect EFT payment under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Bank Information - not qualified to be allowed to EFT
Form CF-1120PV-EFT Return Payment Voucher with EFT Payment	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + amount of payment due on the form + Option to elect EFT payment under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Bank Information - select the "Filing by EFT" checkbox and also be a city that allows to file by EFT - look at the same screen and it indicates if the city allows to file by EFT - look at the "Information only:" not to have text that says the city does not allow for it .

Form CF-7004 Application for Extension	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities Ext is not selected for Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + Selected the Michigan City "Extension" under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Extension check box + amount of tax on the form + the Option to elect EFT under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Extension Information is not selected.
Form CF-7004EFT Application for Extension with EFT Payment	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities Ext is not selected for Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + Selected the Michigan City "Extension" under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Extension check box + amount of tax on the form + Option to elect EFT payment under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Extension Information - select the "EFT" checkbox and also be a city that allows to file by EFT - look at the same screen and it indicates if the city allows to file by EFT - look at the "Information only:" not to have text that says the city does not allow for it .
Schedule RZ of CF-1120	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + Choose option greater than 0% under Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Schedule RZ info. for the "Deduction allowance factor (Mandatory) + amount on the form for RZ deduction for the tax year + be one of the cities that allow it - there is a link on the tax form to view.
Schedule TD of CF-1120	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Michigan Cities + Option to suppress is not selected Organizer Cities Michigan Cites Common Form Michigan Common Form City "City Name" Return Options - print suppress of City forms + amount on the form for TD deduction for the tax year + be one of the cities that allow it - there is a link on the tax form to view.

Michigan Cities: Detroit

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

Form/Schedule	Requirement(s) to Print
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Form 5297

Form 5298

Form 5324

Form D-1120	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Detroit
Form D-1120 EXT	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Detroit + Selected the Detroit "On Extension" under Organizer States Common State Estimates and Extensions and on the first tab "Extension" + there is an amount on form
Form D-1120-ES	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" Detroit + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Organizer Cities Detroit, MI Overpayment and Estimate Options Estimated Tax Compute and Print Options Suppress print if no payments are due after applying overpayment is not marked and amount exits on form.

Minnesota

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

Form/Schedule

Requirement(s) to Print

Form AMT-I	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company. + The check box for "Small corporation exempt from federal AMT under IRC sec 55(e)" is not selected in Organizer States Minnesota General Information. + Print is not suppressed in Organizer States Minnesota Return Options.
Form AMT-T	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company. + The check box for "Small corporation exempt from federal AMT under IRC sec 55(e)" is not selected in Organizer States Minnesota General Information. + Print is not suppressed in Organizer States Minnesota Return Options. + An amount for "AMT credit carryover from prior year" is not entered in Organizer States Minnesota Credits General Credits. + There is an amount on line 1, 7, or 13 in Tax Forms States Minnesota AMTT - Alt. Min. Tax Credit.
Form AWC	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + The check box is selected to "compute Form AWC Alternative Withholding Certificate for nonresidents in Organizer States Minnesota Alternative Withholding Certificate. + (The amount on line 31 of Schedule KS is greater than \$1000. OR + The option to force print is selected in Organizer States Minnesota Return Options.)

Form BANK	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + E-file is enabled. + The "Authorization to Debit Funds" check box is selected in Organizer States Common State General Information Bank Information. + The option to pay by check is not selected in Tax Forms States Minnesota M4 - Corporation Franchise Tax M4 - Corp. Franchise Tax, Page 2 tab.
Form DIV	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company. + There is an amount on line 8a in Tax Forms States Minnesota M4 - Corporation Franchise Tax M4T - Tax Calculation tab.
Form EST	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + (There is an amount on line 17 in Tax Forms States Minnesota M15C - Underpayment of Estimated Tax. OR There is an amount on line 12 in Tax Forms States Minnesota EST - Underpayment of Estimated Tax EST - Underpayment of Estimated Tax. OR Options 2, 3, or 5 are selected in Organizer States Minnesota Underpayment Options.) + An override is not entered in Organizer States Minnesota Underpayment Options.
Form ESTa	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + (There is an amount on line 17 in Tax Forms States Minnesota M15C - Underpayment of Estimated Tax. OR There is an amount on line 12 in Tax Forms States Minnesota EST - Underpayment of Estimated Tax EST - Underpayment of Estimated Tax. OR Options 2, 3, or 5 are selected in Organizer States Minnesota Underpayment Options.) + The check box is not selected to "Compute using the Annualized Income Installment method" in Organizer States Minnesota Underpayment Options.
Form Estimated Tax Payment	* Per instructions, this form cannot be printed within the software.
Form ETP	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + There is an amount on line 4 in Tax Forms States Minnesota ETP - Employer Transit Pass Credit.
Form Extension Payment	* Per instructions, this form cannot be printed within the software.
Form KS	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Print is not suppressed in Organizer States Minnesota Special Allocations + The shareholder's number needs to be entered in Organizer Shareholder Information Shareholder Data Shareholder Information Shareholder Information.

Form M15C	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company. + There is an amount on Form M15C, line 17 in Tax Forms States Minnesota M15C - Underpayment of Estimated Tax. + An override cannot be entered in Organizer States Minnesota Underpayment Options. + Option 2, 3, or 5 is selected in Organizer States Minnesota Underpayment Options. + Print is not suppressed in Organizer States Minnesota Underpayment Options.
Form M4	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company.
Form M4A	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company.
Form M4I	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company. + There needs to be an amount on Form M4I, Page 1, line 1 in Tax Forms States Minnesota M4 - Corporation Franchise Tax M4I - Income Calculation tab.
Form M4T	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company.
Form M4X	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + The Amended Return is activated in Organizer States Minnesota Amended Return Information.
Form M8	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab.
Form M8A	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab.
Form M8X	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + The Amended Return is activated in Organizer States Minnesota Amended Return Information.
Form NOL	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company. + A year needs to be entered in the year column in Tax Forms States Minnesota NOL - Net Operating Loss Deduction. + There needs to be an amount in the "Minnesota Losses Used" column in Tax Forms States Minnesota NOL - Net Operating Loss Deduction.

Form RD	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Single company. + An override cannot be entered in Organizer States Minnesota Credits Increasing Research Credit. + There needs to be an amount on line 29, 31, or 32 on Form RD in Tax Forms States Minnesota RD - Research Credit RD - Research Credit, Page 2 tab.
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Form Tax Return Payment	* Per instructions, this form cannot be printed within the software.
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SchAFF

SchMHPC

SchMHPS

SchPTE

SchRAIL

SchRAILS

SchREC

SchTPD

Minnesota Combined

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

Form/Schedule

Requirement(s) to Print

Form AFF	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return. + Print is not suppressed in Organizer States Minnesota Combined Return Information Combined Return Information.
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Form AMT-I	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return. + The check box for "Small corporation exempt from federal AMT under IRC sec 55(e)" is not selected in Organizer States Minnesota General Information. + Print is not suppressed in Organizer States Minnesota Return Options. + (There needs to be a Minnesota Tax ID in Tax Forms States Minnesota M4 - Corporation Franchise Tax. OR + There needs to be an amount on line 11 in Tax Forms States Minnesota M4 - Corporation Franchise Tax M4A - Apportionment / Fee Calculation tab.) + The entity cannot be an elimination.
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Form AMT-T	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return. + The check box for "Small corporation exempt from federal AMT under IRC sec 55(e)" is not selected in Organizer States Minnesota General Information. + Print is not suppressed in Organizer States Minnesota Return Options. + An amount for "AMT credit carryover from prior year" is not entered in Organizer States Minnesota Credits General Credits. + (There is an amount on line 1 or 13 in Tax Forms States Minnesota AMTT - Alt. Min. Tax Credit. OR + There needs to be an amount in Tax Forms States Minnesota Combined Report AMTT - Alt. Min. Tax Credit AMTT, Detail for each member.)
Form DIV	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return.
Form M4	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return.
Form M4A	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return. + There is an amount on line 9 or 12 in Tax Forms States Minnesota Combined Report M4A - Appr/Fee Calculation M4A Detail M4A App/Fee Detail.
Form M4I	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return. + There needs to be an amount on Form M4I, Page 1, line 1 in Tax Forms States Minnesota M4 - Corporation Franchise Tax M4I - Income Calculation tab.
Form M4T	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return.
Form REC	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return. + There needs to be an amount in Tax Forms States Minnesota Combined Report REC - Reconciliation REC- Reconciliation
Schedule RD	Minnesota is activated on the State and City Activation Organizer and is released. + Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + Combined return. + There needs to be an amount on line 29, 31, or 32 on Form RD in Tax Forms States Minnesota RD - Research Credit RD - Research Credit, Page 2 tab.

Mississippi

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

Form/Schedule

Requirement(s) to Print

Form 83-105	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation
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Form 83-110	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation
Form 83-120	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation
Form 83-122	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation
Form 83-124	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation
Form 83-125	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation
Form 83-150	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation
Form 83-155	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation + Total NOL Available amounts entered +Net Capital gain amounts are entered
Form 83-180	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation or S-Corp or Insurance + if thee is tax amount to be paid + return is on extension box is checked
Form 83-300	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation + Amount due is entered .
Form 83-305	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation + Total interest and penalty due is entered .
Form 83-310	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Combined return + Amount due is entered .
Form 83-391	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Insurance corporation +if amount due is entered
Form 83-401	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation + Amount due is entered.
Form 83-450	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + C-corporation + Amount due is entered .
Form 84-105	
Form 84-110	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation
Form 84-122	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation
Form 84-124	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation
Form 84-125	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation

Form 84-131	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation + Share holders name and percentage entered
Form 84-132	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation + Shareholders name and percentage entered
Form 84-150	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-Corporation + Directly allocable item entered
Form 84-161	
Form 84-300	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation
Form 84-401	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation + Franchise tax or income tax credit entered
Form 85-105 - Check box option on Form 85-105 is supported.	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation
Form 85-122 - Check box option on Form 85-122 is supported.	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation
Form 85-132	Not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + S-corporation
Form 85-391, pg. 1-4 (Insurance)	Not suppressed in Organizer I19 Common State Print Options Print Suppression Suppression MD-RI + Insurance entity type + C-corporation

Missouri

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

Form/Schedule

Requirement(s) to Print

Form 2330	Organizer States State and City Activation State and City Activation Savings and Loan Or Credit Union selected + Tax Forms States Missouri Bank 2330 - Apportionment Schedule C Line 8 has data
Form 2331	Organizer States State and City Activation State and City Activation Savings and Loan Or Credit Institution Or Credit Union selected
Form 2823	Organizer States State and City Activation State and City Activation Credit Institution selected
Form 4347	Organizer States State and City Activation State and City Activation Bank selected + Tax Forms States Missouri Bank 4347 - Appt. Sch. Bank Franchise Line 7 has data
Form INT-2	Organizer States State and City Activation State and City Activation Bank selected

Form INT-2-1	Organizer States State and City Activation State and City Activation Bank selected + Organizer State Financial Missouri Bank Bank Franchise Force print Schedule BF selected OR Tax Forms States Missouri Bank INT-2-1 - Bank Franchise Schedule BF Line 6A selected OR Tax Forms States Missouri Bank INT-2-1 - Bank Franchise Schedule BF Line 6B selected
Form INT-3	Organizer States State and City Activation State and City Activation Savings and Loan Or Credit Union selected
Form INT-4	Organizer States State and City Activation State and City Activation Credit Union selected
Form MO-1040	Organizer States State and City Activation State and City Activation 1120S selected
Form MO-1120	Organizer States State and City Activation State and City Activation 1120 selected + Organizer States Missouri Return Options Print Suppression M)-1120 not selected
Form MO-1120ES	Organizer States State and City Activation State and City Activation 1120 selected + Organizer States Common State Print Options Print Suppression Suppression MD-RI not suppressed from common state + Has amount on the form
Form MO-1120S (S Corp)	Organizer States State and City Activation State and City Activation 1120S selected
Form MO-1120V	The following option is NOT selected: Organizer States Missouri Return Options Print Suppression + the following field has data Tax Forms States Missouri MO-1120V-Payment Voucher Amount is not equal to NONE
Form MO-1NR	Organizer States State and City Activation State and City Activation 1120S selected + Organizer States Missouri Return Options not suppressed
Form MO-22	Organizer States State and City Activation State and City Activation 1120 selected + Organizer States State and City Activation State and City Activation Top Consolidation selected
Form MO-2220	Organizer States State and City Activation State and City Activation 1120 selected + Organizer States Missouri Underpayment Options - "Suppress penalty computation and do not print form" not suppressed
Form MO-2NR	Organizer States State and City Activation State and City Activation 1120S selected + Organizer States Missouri Return Options not suppressed + Organizer States Missouri Shareholder Information Shareholder Individual Shareholder Print Options not suppressed
Form MO-3NR	Organizer States State and City Activation State and City Activation 1120S selected + Organizer States Missouri Return Options not suppressed + Organizer States Missouri Shareholder Information Shareholder Individual Shareholder Print Options not suppressed
Form MO-7004	Organizer States State and City Activation State and City Activation 1120 selected + Checked Extension Organizer States Common State Estimates and Extensions

Form MO-C	Organizer States State and City Activation State and City Activation 1120 selected + Field has data: Tax Forms States Missouri MO-C MO-C-Dividends Deduction + No Override: Organizer States Missouri State Adjustments MO dividends deduction
Form MO-MS	The following option is selected: Organizer States State and City Activation State and City Activation 1120 + Not suppress: Organizer States Missouri Return Options MO-MS + The following fields have data(any one) Tax Forms States Missouri MO-MS-Allocation and Apport. of Income MO-MS, Page 2 Line 14 (MO Income Percentage) OR Tax Forms States Missouri MO-MS-Allocation and Apport. of Income MO-MS, Page 2 Line 16 (MO Income Percentage OR Tax Forms States Missouri MO-MS-Allocation and Apport. of Income MO-MS, Page 2 Line 7a (MO optional single sales factor Tax Forms States Missouri MO-MS-Allocation and Apport. of Income MO-MS, Page 1 Mileage percentage
Form MO-MSS (S Corp)	The following option is selected: Organizer States State and City Activation State and City Activation 1120S + Not suppress Organizer States Missouri Return Options MO-MSS + The following option is selected: Organizer States Missouri Allocation and Apportionment Method
Form MO-NBI	The following option is selected: Organizer States State and City Activation State and City Activation 1120 + The following option is selected: Organizer States Missouri Allocation and Apportionment Method 1 + The following field has data: Organizer States Missouri Allocation and Apportionment Nonbusiness Income
Form MO-NRS (S Corp)	The following option is selected: Organizer States State and City Activation State and City Activation 1120S + None MO resident: Organizer Shareholder Information Shareholder Data Shareholder Information State of residency - is not Missouri + Not Suppress to print: Organizer States Missouri Shareholder Information Individual Shareholder Print Options
Form MO-TC	The following option is selected: Organizer States State and City Activation State and City Activation 1120 + Not suppress: Organizer States Missouri Return Options MO-TC + Form has data: Tax Forms States Missouri MO-TC-Miscellaneous Income Tax Credits
Sch MO NAI	
Schedule K Equivalent	The following option is selected: Organizer States State and City Activation State and City Activation 1120S + Not Suppress to print: Organizer States Common State Print Options Print Suppression Suppression MD-RI

Missouri Cities: Kansas City

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

Form/Schedule

Requirement(s) to Print

Form RD108	Kansas City must be activated in Organizer States States and City Activation + Kansas City must not suppressed in Organizer States Common states Print options Print Suppression
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Form RD111	Extension form of Kansas City must not suppressed in Organizer States Common states Print options Print Suppression + A valid option must be choose in Organizer Cities Kansas City, MO Print options Print Suppression and Compute Options
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Missouri Cities: St. Louis

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

Form/Schedule	Requirement(s) to Print
Form E-234	St. Louis must be activated in Organizer States States and City Activation + St. Louis must not suppressed in Organizer States Common states Print options Print Suppression
Form E-8	Extension form of St. Louis must not suppressed in Organizer States Common states Print options Print Suppression + A valid option must be choose in Organizer Cities St. Louis, MO Print options Print Suppression and Compute Options

Montana

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

Form/Schedule	Requirement(s) to Print
Form AEPC	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Tax Forms States Montana AEPC Page 1 Part II line 6 is being calculated
Form CC	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Tax Forms States Montana CC - College Contribution Credit Line 2 has an amount
Form CIT	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked
Form CLT-4 Combined Schedule K	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + CANNOT be a parent or subsidiary return
Form CLT-4S (S Corp)	Montana return is a S-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked
Form CLT-4-UT	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Organizer States Montana Underpayment Options Option to Compute and Print Underpayment Penalty any option except "Suppress Penalty computation and do not print form" + Tax Forms States Montana CIT-UT Page 1 Line 18 has an amount

Form CT	Montana return is a C-Corp AND Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT Est Tax checkbox is not checked AND Tax Forms States Montana CT - Corp. License Tax Payment CT, Quarter 1-4 There is an amount due If printing CT Extension: + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT Ext Tax checkbox is not checked AND Organizer States Common State Estimates and Extensions Montana on extension checkbox is checked and an amount on Extension amount paid
Form DCAC	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Tax Forms States Montana DCAC - Depend. Care Assist. Cr. Part IV has an amount
Form HI	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Tax Forms States Montana HI - Disability Insur. for Uninsur. Part III line 3 has an amount
Form PT-AGR	Montana return is a S-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Organizer States Montana Shareholder Information Shareholder Information PT-AGR is signed or revoked
Form RCYL	Montana return is a C-Corp or S-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Tax Forms States Montana RCYL - Recycling Credit/Deduction RCYL - Recycling Credit, Page 1 and Page 2 Part III or Part IV or Part V's total amount line is generating
MontanaAdjustmentWks	
MTSourceIncomeSch	
Schedule C	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked
Schedule K Equivalent (S Corp)	Montana return is a S-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT K-1 Equivalent checkbox is not checked
Schedule K-1 (S Corp)	Montana return is a S-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT K-1 Equivalent checkbox is not checked + Organizer States Montana Shareholder Information Shareholder Information Suppress print of MT Schedule K-1 is not checked
Schedule M	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked + Tax Forms States Montana CIT CIT, Page 2 Part 3 line H or I or J has YES selected

Schedule WE	Montana return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI MT State forms checkbox is not checked
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ScheduleDE

SchIIPR1

SchIPR1

SchIVPR1

SchKCIT

SchNoICIT

SchVII

SchVIPR1

WksApportionableInc

WksCITUTAnnualizedIncome

Nebraska

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

Form/Schedule

Requirement(s) to Print

Form 1120 NF Financial Institution	Nebraska should be marked as a Financial Return on the State Activation worksheet + return must have an overpayment amount at line 21 to print the electronic funds transfer detail
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Form 1120N	Return is a C corporation + NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression Options + Not a financial return at Organizer States State and City Activation
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Form 1120N, Schedule III and IV	Return is a C corporation + NE is not suppressed on Organizer Common State Print Options Print Suppression Suppression Options + Not a financial return at Organizer States State and City Activation + Return type is Subconsolidation or Top consolidation
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Form 1120N, Schedules A, I, II	Return is a C corporation + NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression Options + Not a financial return at Organizer States State and City Activation
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Form 1120N-ES	NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI State Forms column OR Est Tax column + Organizer States Common State Tax Estimate Options Estimated Tax Options is not marked '2' in Nebraska column + Organizer States Common State Tax Estimate Options Estimated Tax Payments has an amount entered on NE for the related estimate payment OR Organizer States Common State Tax Estimated Options Estimated Tax Option '6' is marked for NE with Total Estimated Tax amount entered * If Organizer States Common State Tax Estimate Options Estimated Tax Options Only print vouchers for specific quarters section is completed, 1) the quarter required must be checked and 2) Only print vouchers with amounts must NOT be marked OR there must be an amount present on Tax Forms States Nebraska 1120N-ES - Estimated Tax, line 4 of the specific voucher.
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Form 1120N-V	Form is marked to print at Organizer States Nebraska Return Options Force Print
Form 1120SN (S Corp)	Return is an S corporation + NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression Options + Not a financial return at Organizer States State and City Activation
Form 1120SN, Schedule A	Return is an S corporation + NE is not suppress on Organizer States Common State Print Options Print Suppression Suppression Options + Not a financial return at Organizer States State and City Activation + 1120SN, Schedule A, Line 7 or Line 17 has an amount
Form 1120SN, Schedule I	Return is an S corporation + NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression Options + Not a financial return at Organizer States State and City Activation
Form 1120SN, Schedule II	Return is an S corporation + NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression Options + Not a financial return at Organizer States State and City Activation
Form 1120SN, Schedule III	
Form 1120XN	Amended return is marked to print at Organizer States Nebraska Amended Return Amended Return 'Print 1120XN'
Form 12N	Return is an S corporation + Form 12N is marked as attached at Organizer States Nebraska Shareholder Information Shareholder Detail
Form 2220N	NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI State Forms column OR Und of Est Tax + Form 2220N, Line 26 is populated AND option to suppress print is not selected at Organizer States Nebraska Underpayment Options Options to Compute and Print Underpayment Penalty
Form 3800, Worksheet E	Form is not suppressed at Organizer States Nebraska Return Options Print Suppression + Line 5 of worksheet has an amount
Form 3800N	Form is not suppressed at Organizer States Nebraska Return Options Print Suppression
Form 7004N	NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI Ext column + Tax Forms States Nebraska 7004N - Extension must have an amount on line 11 OR Organizer States Common State Estimates and Extensions Extension tab, Nebraska is marked as 'On Extension' in column B.
Form NFC	
Form PTC	
Form TANF	
Schedule K Equivalent	NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI State Forms column OR K-1 Equiv
Schedule K-1N	NE is not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI State Forms column OR K-1 Equiv + Shareholder name is present

Schedule PTET

Nevada

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

Form/Schedule	Requirement(s) to Print
Application for Extension	Form prints for the tax return year selected for Form TXR-030.01 to print if the print option is checked in Organizer States Nevada (applicable tax year) Return Application for Extension.
Form TXR-030.01	If only one Commerce Tax return year is selected to file in Organizer States Nevada Commerce Tax Year, that return year prints. +If more than one Commerce Tax return year is selected to file, the Commerce Tax Year option Tax Year to Print if More Than One Tax Year Is Selected to File in the Commerce Tax Year screen determines the return year that prints.

New Hampshire

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

Form/Schedule	Requirement(s) to Print
Affiliation Schedule	Consolidated return
Form ADDLINFO	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Print automatically
Form BET	Single and Consolidation + data exist on line 5 page 1
Form BET Worksheet	
Form BET-80	Compensation Factor exist on line 3 or Line 6 or Line 11 Tax Forms States New Hampshire BET-80 BET Apportionment BET-80, Page 1 + Tax Forms States New Hampshire BET - Business Enterprise Tax Return + Force compute Organizer States New Hampshire BET Return check box + Organizer States New Hampshire BET Return check box
Form BET-80-WE	Consolidation or Sub consolidation and If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI
Form BT-EXT	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI automatically
Form BT-Summary	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI
Form DP-120	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Amount on Federal Schedule K line 2 + BPT required check box Organizer States New Hampshire General Information General Information
Form DP-131-A	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Print in both Single and Consolidated + Number of NOLs utilized in current year

Form DP-132	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Tax Forms States New Hampshire DP-132 - Net Operating Loss Deduction Line 11, Column D has an amount
Form DP-132-WE	If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI + Consolidation or Sub consolidation and If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI
Form DP-160	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Tax Forms States New Hampshire NH-1120 Business Profits Tax Return NH-1120, BPT Return, Page 3 line 11b. or NH 1120 WE pg 3 line 19b.
Form DP-2210	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Tax Greater than \$200 Tax Forms States New Hampshire DP-2210/2220 Underpayment DP-2210/2220, Page 1 line 1 + Option in Organizer States New Hampshire Underpayment Options
Form DP-80	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Data on line 5 Tax Forms States New Hampshire DP-80 BPT Apportionment + Organizer States New Hampshire General Information General Information check box
Form DP-9	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + Print if distribution total exist
Form NH-1120	If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI + If not Top consolidation nor sub consolidation + will print automatically
Form NH-1120-ES	If not suppressed in Organizer States Common State Print Options Print Suppression Suppression MD-RI + if not option 3 Organizer States New Hampshire Overpayment and Estimate Options Estimated Tax + amount exist Tax Forms States New Hampshire NH-1120-ES Workpaper: NH Estimated Tax Schedule Total Estimate
Form NH-1120-WE	If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI + Consolidation or Sub consolidation and If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI + if not suppress and compute option selected Organizer States New Hampshire Return Options
Form NH-1120-WE, Schedule I	If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI + Consolidation or Sub consolidation and If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI
Form NH-1120-WE, Schedule IA	If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI + Consolidation or Sub consolidation and If not suppress Organizer States Common State Print Options Print Suppression Suppression MD-RI

Form NH-1120-WE, Schedule II If not suppress Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI + Consolidation or Sub consolidation and If not suppress Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI

Form NH-1120-WE, Schedule III If not suppress Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI + Consolidation or Sub consolidation and If not suppress Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI

Form Schedule IV

New Jersey

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

Form/Schedule

Requirement(s) to Print

Form 1080-C Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + Not a Financial Return + Check to print form 1080C on Organizer | States | New Jersey | Return Option | Force Print + (Tax Form | NJ 1080C | Line 17 must has data OR Tax Form | NJ 1080C | Line 18 must has data OR Tax Form | NJ 1080C | Line 25 must has data OR Tax Form | NJ 1080C | Line 26 must has data)

Form 1080-C/Schedule A Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S OR Electing to file as a New Jersey S Corporation on Organizer | States | New Jersey | Return Options | Compute Options + Check to print form 1080C on Organizer | States | New Jersey | Return Option | Force Print + Additional print condition either Suppress or NOT suppress NJ-1080C, Sch A, negative amount n Organizer | States | New Jersey | Return Option | Force Print

Form 1080-C/Schedule B Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S OR Electing to file as a New Jersey S Corporation on Organizer | States | New Jersey | Return Options | Compute Options + Check to print form 1080C on Organizer | States | New Jersey | Return Option | Force Print + Checked If shareholder is not participant on composite return on Organizer | States | New Jersey | Composite Information | Shareholder Information

Form 300 If Form 300 | Page 1 | Part I | Question 1 to 7 answered YES OR Form 300 | Page 1 | Part IV | Line 21 has a value greater than zero + Form 300 not suppressed on Organizer | States | New Jersey | Return Options

Form 301 If Form 301 | Part I | Question 1 to 5 answered YES OR Form 301 | Part II | Line 15 has a value greater than zero + Form 301 not suppressed on Organizer | States | New Jersey | Return Options

Form 302 If Form 302 | Page 1 | Part I | Question 1 to 6 answered YES OR Form 302 | Page 2 | Part III | Line 18 has a value greater than zero + Form 302 not suppressed on Organizer | States | New Jersey | Return Options

Form 303 If Form 303 | Part I | Question 1 to 2 answered YES OR Form 303 | Part II | Line 11 has a value greater than zero + Form 303 not suppressed on Organizer | States | New Jersey | Return Options

Form 304 If Form 304 | Page 1 | Part I | Question 1 to 3 answered YES OR Form 304 | Page 2 | Part III | Line 22 has a value greater than zero + Form 304 not suppressed on Organizer | States | New Jersey | Return Options

Form 305	Tax Form Form 305 Page 1 Line 10 has to have value greater than zero OR Tax Form Form 305 Page 1 Line 17 has to have value greater than zero OR Tax Form Form 305 Page 1 Line 18 has to have value greater than zero OR Tax Form Form 305 Page 1 Line 19 has to have value greater than zero OR Tax Form Form 305 Page 1 Line 20 has to have value greater than zero
Form 306	Tax Form Form 306 Page 1 Line 15 has to have value greater than zero OR Tax Form Form 306 Page 1 Line 18 has to have value greater than zero OR Tax Form Form 306 Page 1 Line 24 has to have value greater than zero OR Tax Form Form 306 Page 2 Line 27 has to have value greater than zero
Form 308	Form 308 Part II Line 18 has a value greater than zero + Form 308 not suppressed on Organizer States New Jersey Return Options
Form 310	Form 310 Part II Line 11 has a value greater than zero + Form 310 not suppressed on Organizer States New Jersey Return Options
Form 311	Not suppress Form 303 on Organizer States New Jersey Return Options + (If Form 311 Part I Question 1 to 2 answered YES OR Form 311 Part III Line 10 has a value greater than zero)
Form 312	(If Form 312 Page 1 Part I Question 1 to 3 answered YES OR Form 312 Page 2 Part III Line 16 has a value greater than zero) + Form 312 not suppressed on Organizer States New Jersey Return Options
Form 313	Not suppress Form 313 on Organizer States New Jersey Return Options + (If Form 313 Page 1 Part I Question 1 to 4 answered NO OR Form 313 Page 2 Part IV Line 18 has a value greater than zero)
Form 315	Not suppress Form 315 on Organizer States New Jersey Return Options + Form 315 Page 2 Part II Line 10 has a value greater than zero)
Form 316	Not suppress Form 316 on Organizer States New Jersey Return Options + (If Form 316 Page 1 Part I Question 1 to 4 answered YES OR Form 316 Page 2 Part III Line 11 has a value greater than zero)
Form 317	Not suppress Form 317 on Organizer States New Jersey Return Options + Form 317 Page 2 Part III Line 17 has a value greater than zero)
Form 318	Not suppress Form 318 on Organizer States New Jersey Return Options + (Form 318 Page 1 Part III Line 16 has a value greater than zero OR If Form 318 Page 1 Part I Question 1 to 4 answered YES)
Form 319	Not suppress Form 319 on Organizer States New Jersey Return Options + (If Form 319 Page 1 Part I Question 1 to 2 answered YES OR Form 319 Page 1 Part II Line 11 has a value greater than zero)
Form 320	Not suppress Form 320 on Organizer States New Jersey Return Options + (If Form 320 Page 1 Part I Question 1 and 2 answered YES OR Form 320 Page 1 Part III Line 10 has a value greater than zero)
Form 321	Not suppress Form 321 on Organizer States New Jersey Return Options + (If Form 321 Page 1 Part I Question 1 and 2 answered YES OR Form 321 Page 1 Part III Line 10 has a value greater than zero)

Form 322	Not suppress Form 322 on Organizer States New Jersey Return Options + (If Form 322 Page 1 Part I Question 1 and 2 answered YES OR Form 322 Page 1 Part III Line 9 has a value greater than zero)
Form 323	Not suppress Form 323 on Organizer States New Jersey Return Options + (If Form 323 Page 1 Part I Question 1 to 3 answered YES OR Form 323 Page 1 Part II Line 9 has a value greater than zero)
Form 324	Not suppress Form 324 on Organizer States New Jersey Return Options + Form 324 Page 1 Part III Line 4 has a value greater than zero)
Form 325	Not suppress Form 325 on Organizer States New Jersey Return Options + Form 325 Page 1 Part II Line 4 has a value greater than zero)
Form 401	Organizer States State and City Activation State and City Activation Return Type 1120 + Not Organizer States State and City Activation State and City Activation Return Type 1120S + Tax Form Form 401 Part II Line 5 has to have value greater than zero + Name of Affiliate must be entered on Tax form States New Jersey Form 401 Part I Click on the View AMA Threshold Limit Detail hyperlink will take you to organizer
Form 500	When Entire NOL has value greater than zero and Not equal to NONE
Form 501	Tax form Form 501 Line 18 column C has a value greater than zero
Form 501-GIT	Tax form Form 501-GIT Line 14 column c has a value greater than zero
Form BFC-1	Financial Return activated on Organizer States Common States State and City Activation
Form BFC-1/Schedule I	Financial Return activated on Organizer States Common States State and City Activation + Inactive selected on Organizer States Common State General Information Basic Return Information Filing Status tab column E
Form BFC-150	(Estimated Tax is not suppress on Organizer States Common States Print Options Print Suppression + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Financial Return activated
Form BFC-160-A	((Tax Form BFC - 160-A Part III Line 18 OR Underpayment of Estimated Tax option 1 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 2 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 3 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 5 on Organizer States New Jersey Underpayment Options) + Underpayment of Estimated Tax Not option 4 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax selection required) + Under of Estimate Tax is Not Suppress under Organizer States Common State Print Options Print Suppression) + No override Underpayment of estimated tax on Organizer States New Jersey Underpayment Options + Financial Return activated

Form BFC-160-B	((Tax Form BFC - 160-B Part III Line 18 OR Underpayment of Estimated Tax option 1 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 2 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 3 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 5 on Organizer States New Jersey Underpayment Options) + Underpayment of Estimated Tax Not option 4 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax selection required) + Under of Estimate Tax is Not Suppress under Organizer States Common State Print Options Print Suppression) + No override Underpayment of estimated tax on Organizer States New Jersey Underpayment Options + Financial Return activated
Form BFC-200-T	Extension is Not Suppress under Organizer States Common State Print Options Print Suppression + Tentative Tax on extension form + Return is on extension + Balance Due on Tax Form BFC-200T Line 8 + Financial Return activated
Form CBT-100	Financial Return is Not activated + Organizer States State and City Activation State and City Activation Return Type 1120
Form CBT-100/Schedule I	Organizer States State and City Activation State and City Activation Return Type 1120 + C corporation + Inactive is selected on Tax form New Jersey CBT 100 Page 1
Form CBT-100R	If not BFC activated + if taxable beginning date on or after January 1, 2018, and end before July 31, 2018
Form CBT-100-S	Organizer States State and City Activation State and City Activation Return Type 1120S + Electing to file as a New Jersey S Corporation on Organizer States New Jersey Return Options Compute Options
Form CBT-100S/Schedule I	Organizer States State and City Activation State and City Activation Return Type 1120S + Electing to file as a New Jersey S Corporation on Organizer States New Jersey Return Options Compute Options + Inactive is selected on Tax form New Jersey CBT 100S Page 1
Form CBT-150C (C Corp)	(Estimated Tax is not suppress on Organizer States Common States Print Options Print Suppression + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Financial Return is NOT activated + Not a S corporation + Payment amount
Form CBT-150S (S Corp)	(Estimated Tax is not suppress on Organizer States Common States Print Options Print Suppression + Valid estimate options selected in Organizer States Common State Tax Estimate Options Estimated Tax Options + Financial Return is NOT activated + Not a C corporation + Electing to file as a New Jersey S Corporation on Organizer States New Jersey Return Options Compute Options + Payment amount

Form CBT-160-A	((Tax Form CBT-160-A Part III Line 18 OR Underpayment of Estimated Tax option 1 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 2 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 3 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 5 on Organizer States New Jersey Underpayment Options) + Underpayment of Estimated Tax Not option 4 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax selection required) + Under of Estimate Tax is Not Suppress under Organizer States Common State Print Options Print Suppression) + No override Underpayment of estimated tax on Organizer States New Jersey Underpayment Options + Financial Return is NOT activated
Form CBT-160-B	((Tax Form CBT-160-B Part III Line 18 OR Underpayment of Estimated Tax option 1 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 2 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 3 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax option 5 on Organizer States New Jersey Underpayment Options) + Underpayment of Estimated Tax Not option 4 on Organizer States New Jersey Underpayment Options OR Underpayment of Estimated Tax selection required) + Under of Estimate Tax is Not Suppress under Organizer States Common State Print Options Print Suppression) + No override Underpayment of estimated tax on Organizer States New Jersey Underpayment Options + Financial Return is NOT activated
Form CBT-200T	Extension is Not Suppress under Organizer States Common State Print Options Print Suppression + Tentative Tax on extension form + Balance Due on Tax Form CBT-200T Line 8 + Financial Return is NOT activated + C corporation + Return is on extension
Form GIT-DEP	Electing to file as a New Jersey S Corporation on Organizer States New Jersey Return Options Compute Options OR S Corporation + Not deactivated New Jersey depreciation detail on Organizer States New Jersey Return Options Compute Options + New Jersey depreciation adjustment has to have a value greater than zero on Tax form CBT 100S, Pg 10 Schedule K Parts I-III Part II Line 7 click on the hyperlink will take you to the yellow work paper. + Asset detail required to entered at the federal Organizer Income and Deduction Deductions Depreciation and Amortization General Depreciation and Amortization Asset Detail with correct data entry and method
Form NJ 1080-E	Electing to file as a New Jersey S Corporation on Organizer States New Jersey Return Options Compute Options OR S Corporation + Force print Form 1080C on Organizer States New Jersey Return Options
Form NJ-1040ES	Electing to file as a New Jersey S Corporation on Organizer States New Jersey Return Options Compute Options OR S Corporation + Financial Return is NOT activated + NOT a C corporation + Electing to file as a New Jersey S Corporation on Organizer States New Jersey Return Options Compute Options + Not suppress Form NJ-1040-ES on Organizer States New Jersey Return Options Compute Options Print Suppression + Amount of payment has a value greater than zero

Form NJ-1040SC	Not suppress Form NJ-1040-SC on Organizer States New Jersey Return Options Compute Options Print Suppression + Shareholder information must be entered
Schedule G-2	Tax Form New Jersey Schedule G-2 Exception Schedule G-2 Page 2 Total Exceptions Chart for Part I Line 5 has a value greater than zero OR Tax Form New Jersey Schedule G-2 Exception Schedule G-2 Page 3 Total Exceptions Chart for Part I Line 3 has a value greater than zero
Schedule N	Force print Schedule N on Organizer States New Jersey Return Options OR (New Jersey Corporation Type selected s Foreign on Tax form New Jersey Selected Options Filing Type + Financial return is NOT activated)
Schedule O	Force print Schedule O on Organizer States New Jersey Return Options
Schedule PT	Not Inactive + activate Schedule PT on Organizer States New Jersey Previously Taxed Dividends Schedule PT Information
Schedule RT	Not Inactive

New Mexico

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

Form/Schedule	Requirement(s) to Print
Form 1099NEC	
Form CIT-1	New Mexico return is a C-Corp
Form CIT-A	New Mexico return is a C-Corp + Organizer States New Mexico Return Options Form CIT-A print suppression checkbox is not checked + Tax Forms States New Mexico CIT-A - Apportionment of Income Line 4 or Line 9 has an amount
Form CIT-B, C	New Mexico return is a C-Corp + Organizer States New Mexico Return Options Form CIT-B/C/D print suppression checkbox is not checked
Form CIT-CR	New Mexico return is a C-Corp + Organizer States New Mexico Credits Needs input here
Form CIT-ES	New Mexico return is a C-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI NM Estimated checkbox is not checked + Tax Forms States New Mexico CIT-ES Vouchers 1-4 Amount enclosed fields have an amount
Form CIT-PV	New Mexico return is a C-Corp + Tax Forms States New Mexico CIT-PV - Tentative Payment Voucher There is an amount on the Amount Enclosed field
Form RPD-41096	New Mexico return is a C-Corp or S-Corp + Organizer States Common State Estimates and Extensions New Mexico On Extension Column checkbox is checked + Organizer States Common State Print Options Print Suppression Suppression MD-RI NM Extension checkbox is not checked
Form RPD-41359	Prints if there is data and not suppressed

Form RPD-41367	New Mexico return is a S-Corp + At least one Shareholder exists + Organizer States New Mexico RPD-41367 Print Options Suppress RPD-41367 checkbox is not checked. Pages 1 & 2 print if there is data. Page 3 prints if less than 52 owners or if force print option is selected in Organizer States New Mexico RPD-41367 Print Options Force print RPD-41367 Schedule A (if more than 51 owners) checkbox is checked.
Form RPD-41379	Does not print. E-file only form.
Form S-Corp	New Mexico return is a S-Corp
Form S-Corp-ES	New Mexico return is a S-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI NM Estimated checkbox is not checked + Tax Forms States New Mexico S-Corp-ES Vouchers 1-4 Amount enclosed fields have an amount
Form S-Corp-PV	New Mexico return is a S-Corp + Tax Forms States New Mexico NM-S-PV Tentative Payment Voucher
Schedule CC	New Mexico return is a C-Corp + Tax Forms States New Mexico Sch CC - Alternative Tax Schedule Line 1 as an amount OR Tax Forms States New Mexico Sch CC - Alternative Tax Schedule Date field has a date
Schedule K Equivalent	New Mexico return is a S-Corp + At least one Shareholder exists + Organizer States Common State Print Options Print Suppression Suppression MD-RI NM Sch K-1 Equivalent checkbox is not checked + Organizer States New Mexico Shareholder Information shareholder Suppress the printing of the Schedule K-1 Equivalent is not checked
Schedule K-1 Equivalent	New Mexico return is a S-Corp + At least one Shareholder exists + Organizer States Common State Print Options Print Suppression Suppression MD-RI NM Sch K-1 Equivalent checkbox is not checked
Schedule S-Corp-1, A	New Mexico return is a S-Corp + Tax Forms States New Mexico NM-S-1 and A S-Corp-1 Line 1 has an amount OR Tax Forms States New Mexico NM-S-1 and A S-Corp-A Line 5 has an amount
Schedule S-Corp-B, C	New Mexico return is a S-Corp + Tax Forms States New Mexico NM-S-B and C S-Corp-B Line 8 has an amount OR Tax Forms States New Mexico NM-S-B and C S-Corp-C Line 5 has an amount
Schedule S-Corp-CR	New Mexico return is a S-Corp + Organizer States New Mexico Credits Needs input here
Schedule S-Corp-EXT	New Mexico return is a S-Corp + Organizer States Common State Print Options Print Suppression Suppression MD-RI NM Extension checkbox is not checked + Tax Forms States New Mexico NM-S-EXT Amount Enclosed has an amount
SchRPD41285	
SchSCorpd	
State1099Misc	

New York

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

Form/Schedule

Requirement(s) to Print

Form CT-183

Form CT-183-M

Form CT-184

Form CT-184-M

Form CT-186-E

Form CT-2 E-file not activated

Form CT-200-V Option chosen to pay by check

Form CT-222 Suppress option not checked

Form CT-223 Amount in column G

Form CT-224 C Corp + Amount on line 4, 11, 12 or 13

Form CT-225 Single + Amount on line 5 or 10

Form CT-225-A Page 2, line C or E + Or Page 4, line C or E

Form CT-225-A/B Amount on line 2 or 4

Form CT-227

Form CT-238 Amount on line 5 or 7

Form CT-241 Amount on line 3 or 9

Form CT-246 Amount on line 3 or line 4

Form CT-248 Amount on line 1 or line 5

Form CT-249 Amount on line 5

Form CT-261 Amount on line 1, 3 or 5

Form CT-3 C Corp + Not combined

Form CT-3.1 C Corp + Amount on Schedule D, line 1 or 2 or Schedule E, line 4 OR Schedule F, line 1 or 6

Form CT-3.2 C Corp + Amount on Schedule A, line 1

Form CT-3.3 C Corp + Amount on Schedule A, line 1 or Schedule C, line 2 or 4

Form CT-3.4 C Corp

Form CT-300 Suppression option not chosen on Organizer | States | New York | Overpayment and Estimate Options | Estimated Options + Amount on line 2 or 3 + Not suppressed on Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI

Form CT-33 Federal return is an 1120-L

Form CT-33 NL Federal return is an 1120-PC

Form CT-33.1 Insurance + Amount on line 5, 20 or 26

Form CT-33.2 Insurance + Amount on line 22 or 25

Form CT-33-A	NY is marked to combine + Insurance type is Life
Form CT-33-A/ATT	NY is marked to combine + Insurance type is Life
Form CT-33-A/B	NY is marked to combine + Insurance type is Life
Form CT-33C	Insurance + Activate CT-33C on screen Organizer States New York General Information
Form CT-33M	Insurance + CT-33-M activated on screen Organizer States New York MTA Surcharge
Form CT-33-R	Insurance + Amount on line 7
Form CT-34-SH	S Corp
Form CT-37	C Corp + Data on line 1 or 7
Form CT-399	Amount on line 10
Form CT-3-A	C Corp + Combined
Form CT-3-A/BC	C Corp + Combined + One prints for each subsidiary from top consolidation + Data source is from subsidiary level
Form CT-3M	C Corp + Activated on screen Organizer States New York MTA Surcharge
Form CT-3-S (S Corp)	S Corp
Form CT-400	Valid option chosen on Organizer States New York Overpayment and Estimate Options Estimated Options + Amount on line 3 + Not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI
Form CT-43	Amount on line 3
Form CT-44	Amount on line 15
Form CT-46	Amount on line 8 or 101
Form CT-46-ATT	
Form CT-47	Amount on line 20, 27, 28 or 29
Form CT-5	C Corp + Single company + Marked on extension on spreadsheet Organizer States Common State Estimates and Extensions
Form CT-5.1	C Corp + Explanation for reason for additional extension on screen Organizer States New York Extension Information
Form CT-5.3	C Corp + Combined + Marked on extension on spreadsheet Organizer States Common State Estimates and Extensions
Form CT-5.4	S Corp + Single company + Marked on extension on spreadsheet Organizer States Common State Estimates and Extensions
Form CT-5.6	Activated on screen Organizer States New York E-file Extension Additional Information Additional Information
Form CT-5.9 & 5.9E	Activated on screen Organizer States New York E-file Extension Additional Information Additional Information
Form CT-501	Amount on line 1

Form CT-60	Amounts entered in schedule A or B
Form CT-601	Amount on line 1
Form CT-602	Amount on line 8, 10 or 13
Form CT-603	Amount on line 5 or 10
Form CT-604	Name of Empire Zone
Form CT-604-CP	Name of partnership entered
Form CT-605	Name of Empire Zone
Form CT-606	Name of Empire Zone
Form CT-607	Amount on line 3, 6, 9, 12, or 18
Form CT-611	Site name on schedule A
Form CT-611.1	Site name on schedule A
Form CT-611.2	Site name on schedule A
Form CT-612	Site name on schedule A
Form CT-613	Site name on schedule A
Form CT-633	Amount on line 6, 14, 17, 22 or 24
Form CT-634	Amount on line 3
Form CT-635	Amount on line 3
Form CT-636	Amount on line 8, 16, 24, 32, or 44g
Form CT-637	Amount on line 5 or 6
Form CT-638	Certificate number on line B
Form CT-639	Amount on line 4
Form CT-640	Certificate number on line B
Form CT-641	Amount on line 5 or 6
Form CT-642	Amount on line 3
Form CT-643	Amount on line 5
Form CT-644	Amount on line 6
Form CT-645	Amount on line 35
Form CT-646	Amount on line 3, 9 or 10
Form CT-648	
Form CT-649	
Form CT-650	
Form CT-651	

Form CT-652

Form CT-652

Form CT-654

Form CT-655

Form CT-656

Form CT-657

Form CT-658

Form CT-660

Form CT-661

Form CT-662

Form DTF-621 Amount on line 27

Form DTF-686 Tax Shelter Data on lines 1, 2 or 4

Form DTF-686-ATT Data on lines 1, 2 or 5

Form IT-203-S Activate nonresident shareholders on screen Organizer | States | New York | Nonresident Group Return | General Information

Form IT-204-LL Add new IT-204-LL on screen Organizer | States | New York | LLC Disregarded Entities

Form IT-2658 Choose to include nonresident shareholders on screen Organizer | States | New York | Report of Estimated Tax | Report of Estimated Tax

Form IT-2658-E Check box to print IT-2658-E on screen Organizer | States | New York | Report of Estimated Tax | Report of Estimated Tax

Form IT-370 Check box to activate IT-370 on screen Organizer | States | New York | Nonresident Group Return | General Information

Form TR-579.1-CT Extension e-file enabled + Paid preparer present + Amount due

Form TR-579-CT Return e-file enabled + Paid preparer present + Amount due

Form TR-579-PT IT-204-LL e-file enabled

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-2 C Corp + Single company

Form NYC-2.1 C Corp + Amounts in schedules D, E or F

Form NYC-2.2 C Corp + Amount on schedule A, line 1

Form NYC-2.3 C Corp + Amounts on part 1 or 2

Form NYC-2.4 C Corp

Form NYC-2.5	C Corp + Amount on NYC-2 or 2A schedule F, line 2A
Form NYC-2.5A	Top consolidation + Combined and sales apportionment
Form NYC-2.5A/BC	Prints from top consolidation + Data source is from parent and subsidiaries + Combined and sales apportionment
Form NYC-200-V	E-file must be enabled + An amount must be due + The payment option must be set to check on the bank information spreadsheet
Form NYC-222	Amount on line 36
Form NYC-245	Activated on screen Organizer Cities New York City, NY Activities Report
Form NYC-2A	C Corp + Top consolidation
Form NYC-2A/BC	C Corp + Top consolidation
Form NYC-2S	C Corp + Marked as short form on Organizer Cities New York City, NY Return Options
Form NYC-300	C Corp + Amount on line 1 + Estimates not suppressed in common state
Form NYC-399	Amounts on schedule C, line 8
Form NYC-399Z	Amounts on Schedule C, line 8
Form NYC-3A	S Corp + Top consolidation
Form NYC-3A/ATT	S Corp + Top consolidation
Form NYC-3A/B	S Corp + Top consolidation
Form NYC-3L	S Corp + Single + Not marked as short form
Form NYC-400	Amount on line 2
Form NYC-4S	S Corp + Single + + Marked as short form
Form NYC-579-GCT/BCT	E-file enabled
Form NYC-9.10	Amount on line 1 + Not marked as short form
Form NYC-9.5	Amount on line 11 + Not marked as short form
Form NYC-9.6	Amount on line 3 + Not marked as short form
Form NYC-9.7	S Corp + Amount on line 1c + Not marked as short form
Form NYC-9.7C	C Corp + Amount on line 3 + Not marked as short form
Form NYC-9.8	Amount on line 1, 3 or 9f + Not marked as short form
Form NYC-ATT-S-CORP	S-Corp
Form NYC-EXT	Marked on extension on Organizer States Common State Estimates and Extensions Column B
Form NYC-EXT.1	Reason for additional extension entered on screen Organizer Cities New York City, NY Extension Information
Form NYC-NOLD	Amount on line 21, column E

North Carolina

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

Form/Schedule	Requirement(s) to Print
Form CD-401S (S Corp)	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox
Form CD-401S, Schedule K Detail	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + There is any shareholder defined, from Organizer States Shareholder Information Shareholder Info
Form CD-405	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox
Form CD-405 CW	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression", "Form NC CD405CW" checkbox + Organizer States State and City Activation/Consolidation, line North Carolina is a combined return.
Form CD-419	North Carolina is not suppressed on Organizer States Common State Print Suppression, Suppress MD-RI, "North Carolina", "Ext Tax" checkbox + Any tax liability from Tax Form States North Carolina CD-419 Extension, CD-419, line 3 "Net Franchise Tax Due" or line 7 "Net Corporate Income Tax Due" has amount + North Carolina is on extension from Organizer States Common State Estimates and Extension, "Extension" tab.
Form CD-425	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression", "Form NC-425" checkbox + One of the following has to be Yes: Part 2, line 14 "Franchise Tax Credit Taken" has amount from Tax Form States North Carolina CD-425 Tax Credit Summary, page 1 OR Part 4, line 30 "Income Tax Credits Taken" has amount from Tax Form States North Carolina CD-425 Tax Credit Summary, page 2
Form CD-429	North Carolina is not suppressed on Organizer States Common State Print Suppression, Suppress MD-RI, "North Carolina", "Est Tax" checkbox + There is at least one estimation payment from Tax Form States North Carolina CD-429 Estimated Tax, from installment 1 -4 + There is any setting from Organizer states Common States Tax Estimated Tax Options, state Estimated Tax Form print might reflected the setting.
Form CD-429B	North Carolina is not suppressed on Organizer States Common State Print Suppression, Suppress MD-RI, "North Carolina", "Under of Est Tax" checkbox + Not Underpayment Option 4 selected for North Carolina from Organizer States North Carolina Underpayment Options, "Option to compute and print Underpayment Penalty
Form CD-479	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression", "Form NC-479" checkbox

Form CD-V	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Return is not an Amended return from Tax Form States North Carolina CD405 or CD401S, page 1, "Amended Return" Check Box + one of the following has to be Yes: There is a payment amount from Tax Form States North Carolina CD-V Payment Voucher CD-V Corporation Payment Voucher, "Total Corporate Income Tax Due OR There is a payment amount from Tax Form States North Carolina CD-V Payment Voucher CD-V Franchise Payment Voucher, "Total Franchise Tax Due
Form CD-V (Amended)	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Return is an Amended return from Tax Form States North Carolina CD405 or CD401S, page 1, "Amended Return" Check Box + One of the following has to be Yes: There is a payment amount from Tax Form States North Carolina CD-V Payment Voucher CD-V Amended Corporation Payment Voucher, "Total Corporate Income Tax Due OR There is a payment amount from Tax Form States North Carolina CD-V Payment Voucher CD-V Amended Franchise Payment Voucher, "Total Franchise Tax Due
Form NC REHAB	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression" , "Form NC-REHAB" checkbox + There are any CD REHAB form defined from Tax Form States North Carolina NC-REHAB Historic Rehabilitation Tax CD 478 REHAB
Form NC-478	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression" , "Form NC-478" checkbox + one of the following has to be Yes: There is amount populated on line 43F from Tax Form States North Carolina CD-478 Summary of limited Tax Credit, NC-478 page 2 OR There is amount populated on line 43I from Tax Form States North Carolina CD-478 Summary of limited Tax Credit, NC-478 page 2 OR There is amount populated on line 19F from Tax Form States North Carolina CD-478 Summary of limited Tax Credit, NC-478 page 2 OR There is amount populated on line 19I from Tax Form States North Carolina CD-478 Summary of limited Tax Credit, NC-478 page 2
Form NC-478 Pass-Through	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + There is any entity name defined from Tax Form States North Carolina NC 478 Schedule, Part 1, see details
Form NC-478G	North Carolina is active in the return from : Organizer States State and City Activation State and City Activation. + North Carolina has been released + North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression" , "Form NC-478G" checkbox + There are any CD478G form defined from Tax Form States North Carolina NC-478G Renewable Energy Property CD 478G

Form NC-478J	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression" , "Form NC-478J" checkbox + There are any CD478G form defined from Tax Form States North Carolina NC-478J New Job Credit CD 478J
Form NC-478K	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression" , "Form NC-478K" checkbox + There are any CD478G form defined from Tax Form States North Carolina NC-478K Investing in Business Property CD 478K
Form NC-478L	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression" , "Form NC-478L" checkbox + There are any CD478G form defined from Tax Form States North Carolina NC-478L Investing in Real Property CD 478L
Form NC-EDU	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + Tax form is not suppressed from Organizer States North Carolina Return Options, "Print Suppression" , "Form NC-EDU" checkbox + have contribution amount from Tax Form States North Carolina NC-EDU, "Amount of this contribution
Form NC-K-1 (S Corp)	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + For each shareholder: Shareholder name is defined + NC K-1 print is not suppressed from Organizer States Shareholder Information Shareholder Info, " Suppress NC K-1 for this shareholder" checkbox is not checked
Form NC-NA (S Corp)	North Carolina is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "North Carolina" checkbox + For each shareholder: Shareholder is Non-resident from Tax Forms States North Carolina CD-401S, Sch K dtl CD-401S, Sch K dtl, line 3b answer as Yes. + NC NA is requested to be printed from Organizer States Shareholder Information Shareholder Info, " Print Form NC-NA for this shareholder" checkbox is not checked

Form NCPE

State NC 1099 Misc

North Dakota

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

Form/Schedule

Requirement(s) to Print

Form 40

Option to suppress state forms is not selected at Organizer | States | Common State | Print Options | Print Suppression | "Suppression MD-RI" tab | North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp

Form 40 - Schedule FACT	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp
Form 40-EPV	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp + Amount populated on line "Amount of Payment + Option to suppress is not checked at Organizer States North Dakota Return Options "Print Suppression" section
Form 40-ES	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp + Option to suppress estimates is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "Est Tax + Option to suppress compute and print is not selected at Organizer States North Dakota Overpayment and Estimate Options Estimated Tax tab "Estimated Tax" section + An amount populated on any one quarter (1-4) at Organizer States North Dakota Overpayment and Estimate Options Estimated Tax tab "Payments on Next Year's Estimated Tax" section
Form 40-EXT	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp + Option to suppress extensions is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "Ext + "Yes" is checked on top of Form 40, Page 1, line "Have a federal extension? + An amount populated on line "Amount of Payment
Form 40-UT	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp + Option to suppress underpayment of estimated tax is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "Und of Est Tax + One of the following must be Yes: (Option 2, 3, or 5, is chosen at Organizer States North Dakota Underpayment Options "Option to Compute and Print Underpayment Penalty" section OR Option 1 is chosen and there is a penalty due (An amount populated on line 9)
Form 40X	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp + Amended return has been activated at Organizer States North Dakota Amended Return Information "X to Activate amended return" line
Form 60 - Schedule FACT	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp
Form 60 (S Corp)	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp

Form 60-EPV	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp + Option to suppress is not checked at Organizer States North Dakota Return Options "Print Suppression" section + An amount populated on line "Amount of Payment"
Form 60-ES	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp + Option to suppress estimates is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "Est Tax + Amounts entered at Organizer States Common State Tax Estimate Options Organizer States Common State Tax Estimate Options Estimated Tax Payments tab Line for North Dakota + Amount entered at Organizer States North Dakota Estimated Tax "Amount of payment for next year's estimate" line
Form 60-EXT	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp + Option to suppress extensions is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "Ext + An amount populated on line "Amount of Payment + "Extension" is checked on Form 60, box F
Schedule BG	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp
Schedule CR (Parts 1-3)	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp + North Dakota must be marked as a Top Con or a Sub Con + One of the following must be Yes: (Box b1 must be marked on Form 40, Page 1, Line 1 OR Box c1 must be marked on Form 40, Page 1, Line 1)
Schedule K Equivalent	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp + At least one shareholder must exist
Schedule K-1 (Received)	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp + Option to suppress is not checked at Organizer States North Dakota Return Options "Print Suppression" section + At least one pass through entity must be added at Organizer States North Dakota Pass through Entity Information Add new
Schedule KS	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as an S-Corp + There must be at least one shareholder entered

Schedule RZ	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + One of the following must be Yes: (An amount populated on Schedule RZ, Part 7, Line 7 OR An amount populated at Schedule RZ, Part 7, Line 1c OR An amount populated at Schedule RZ, Part 7, Line 1h)
Schedule SA	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp
Schedule TC	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp
Schedule WE	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp + One of the following must be Yes: (Box c must be marked on Form 40, Page 1, Line 1 OR Box c1 must be marked on Form 40, Page 1, Line 1)
Schedule WW	Option to suppress state forms is not selected at Organizer States Common State Print Options Print Suppression "Suppression MD-RI" tab North Dakota checkbox for column "State Forms + North Dakota is marked as a C-Corp

State1099Misc

State1099Nec

Ohio

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

Form/Schedule

Requirement(s) to Print

Form CAT REF	Enter Total amount of refund claim (Mandatory to trigger CAT REF) in Organizer States Ohio Application for CAT Refund.
Form FIT REF	Enter Total amount of refund claim (Mandatory to trigger FIT REF) in Organizer State Financial Ohio Financial Application for FIT Refund.
Form IT 1140	* If Form IT 4738, Electing Pass-Through Entity Return, is not activated, check the Activate Ohio Pass-Through Entity Return (IT 1140) box in Organizer States Ohio General Information. * Form can be force-printed or suppressed in Organizer States Ohio Return Options. * Form can be suppressed from Schedule K-1 Package print in Organizer States Ohio Return Options.
Form IT 1140 ES	* Either a Withholding tax or an Entity tax payment amount must be entered for an installment in Organizer States Ohio Pass-Through Entity Return Estimate Options. * Vouchers can be suppressed in Organizer States Ohio Return Options.
Form IT 1140P	* Voucher prints with IT 1140 if a payment is being made with the return. * Voucher prints separately from IT 1140 if the IT 1140P payment separate from IT 1140 filing option is checked in Organizer States Ohio Pass-Through Entity Return Payments of Tax. * Voucher can be suppressed in Organizer States Ohio Return Options screen.

Form IT 4708	* If Form IT 4738, Electing Pass-Through Entity Return, is not activated, check the Activate Ohio Composite Return (IT 4708) box in Organizer States Ohio General Information. * Form can be force-printed or suppressed in Organizer States Ohio Return Options.
Form IT 4708 ES	* Select an Estimate Option other than Suppress Compute and Print in Organizer States Ohio Composite Return Overpayment and Estimate Options Estimate tab. Additional entries may be needed on that screen based on the option selected. * If the estimate due is less than the estimated tax payment threshold, vouchers print if the Compute estimate if estimated tax due is less than threshold (\$500) option is selected in Organizer States Ohio Composite Return Overpayment and Estimate Options Estimate tab. * Vouchers can be suppressed in Organizer States Ohio Return Options.
Form IT 4708P	* Voucher prints with IT 4708 if a payment is being made with the return. * Voucher prints separately from IT 4708 if the IT 4708P payment separate from IT 4708 filing option is checked in Organizer States Ohio Composite Return Payments of Tax. * Voucher can be suppressed in Organizer States Ohio Return Options screen.
Form IT 4738	* Form prints if IT 4738 is elected to be filed by checking the box to Activate Ohio Electing Pass-Through Entity Return (IT 4738) in Organizer > States > Ohio > General Information. * Once the form is filed, this election is binding and nonrevocable for the tax year. All owners of the entity are bound by this election and amounts for all owners are included on the form. * IT 1140 and IT 4708 cannot be filed for the tax year if IT 4738 is elected to be filed.
Form IT 4738ES	* Select an Estimate Option other than Suppress Compute and Print in Organizer > States > Ohio > Electing PTE Return > Overpayment and Estimate Options > Estimate tab. Additional entries may be needed on that screen based on the option selected. * If the estimate due is less than the estimated tax payment threshold, vouchers print if the Compute estimate if estimated tax due is less than threshold (\$500) option is selected in Organizer > States > Ohio > Electing PTE Return > Overpayment and Estimate Options Estimate tab. * Vouchers can be suppressed in Organizer > States > Ohio > Return Options.
Form IT 4738P	* Voucher prints with IT 4738 if a payment is being made with the return. * Voucher prints separately from IT 4738 if the IT 4738P payment separate from IT 4708 filing option is checked in Organizer > States > Ohio > Electing PTE Return > Payments of Tax. * Voucher can be suppressed in Organizer > States > Ohio > Return Options screen.
Form IT/SD 2210	* Form prints with IT 1140 and IT 4708 if an estimated tax underpayment is calculated on page 2 Part II for IT 4708 or Page 3 Part II for IT 1140. * Form is suppressed for either IT 1140 or IT 4708 when an Underpayment interest (Override) is entered in the Penalties and Interest screen for each return type. * Form does not apply to IT 4738 for tax years beginning before January 1, 2023.
Form OH IT1140 K1	
Form OH IT4708 K1	* Schedule prints for all investors in the return for IT 1140, IT 4708, and IT 4738 based on the investor type indicated in Organizer States Ohio General Information.
FORM OH IT4738 K1	

Schedule E	Schedule prints for IT 4708 investors based on input in Organizer States Ohio Composite Return Nonrefundable Business Credits.
Schedule K Equivalent	Schedule prints for all Ohio 1120S returns unless one of these options is checked: * Ohio K-1 Equivalent box in Organizer States Common State Print Options Print Suppression Suppression MD-RI tab * IT 1140P payment separate from IT 1140 filing option in Organizer States Ohio Pass-Through Entity Return Payments of Tax * IT 4708P payment separate from IT 4708 filing option in Organizer States Ohio Composite Return Payments of Tax is checked. *IT 4738P payment separate from IT 4738 filing option in Organizer States Ohio Electing PTE Return Payments of Tax is checked.

Ohio Cities: Cincinnati

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

Form/Schedule	Requirement(s) to Print
Business Declaration of Estimated Tax	Form must not be suppressed in Organizer States Common State Print Suppression + Form must not be suppressed in Organizer Cities Cincinnati, OH Print Options + Valid option must be selected in Organizer Cities Cincinnati, OH Overpayment and Estimate Option Estimated Tax tab
Business Income 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 Cincinnati, OH Print Options

Ohio Cities: Columbus

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

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 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 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 Columbus, OH Return Options Print Suppression
Form IT-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 Columbus, OH Return Options Print Suppression + Valid amount must exist in the Part 2, Column 4, Payment line.

Ohio Cities: Generic Cities

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

Form/Schedule	Requirement(s) to Print
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Ohio City General Return	Ohio Generic Cities must be activated in Organizer States States and City Activation + Ohio Generic Cities must not 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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Ohio Cities: Ohio CCA

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

Form/Schedule	Requirement(s) to Print
Form CCA 120-17-BR	Ohio CCA must be activated in Organizer States States and City Activation + Ohio CCA must not be suppressed in Organizer States Common State Print Options Print Suppression + Form must not be suppressed in Organizer Cities Ohio CCA Cities, OH Return Options
Form CCA-201 ES	Form must not be suppressed in Organizer States Common State Print Options Print Suppression + 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 in 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

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 + 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
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 Options Print Suppression + Form must not be suppressed in Organizer Cities Ohio RITA Cities, OH Return Options

Oklahoma

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

Form/Schedule	Requirement(s) to Print
Form 200 Annual Franchise	Form 200 is NOT suppressed on Organizer States Oklahoma Return Options Print Suppression
Form 20-I	N/A
Form 501	Form 501 - If "Number of report enclosed" have data + NOT suppressed on Organizer States Oklahoma Return Options Print Suppression

Form 504	If NOT suppressed on Organizer States Common State Print Options Suppression Options(MD-RI) Extension
Form 511CR	Form 511 - If Total Credits "Line 38" have data
Form 512	Oklahoma State Forms are NOT suppressed on Organizer States Common State Print Options Suppression Options + NOT suppressed on Organizer States Oklahoma Return Options Print Suppression Oklahoma Corporate return
Form 512S (S Corp)	S-Corp is activated + Oklahoma State Forms are NOT suppressed on Organizer States Common State Print Options Suppression Options + NOT suppressed on Organizer States Oklahoma Return Options Print Suppression Oklahoma Corporate return
Form 512SA	S-Corp is activated + Form 512-S Page 5 if "Nonresident Agreement filed" have data
Form OC-V	N/A
Form OW-8-ESC	NOT suppressed on Organizer States Oklahoma Return Options Print Suppression Oklahoma Corporate return + Oklahoma is not suppressed on Est Tax checkbox at Organizer States Common State Print Options Print Suppression Suppression MD-RI + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + One of the following has to be Yes: (Organizer States Common State Tax Estimated Options Only print vouchers for specific quarters "1st quarter thru 4th quarter" or "only print vouchers with amounts" or Tax Form OW-8-ESC voucher 1, or 2, or 3, or 4 have amount Due column under Tax Forms States Oklahoma OW-8-ESC Estimated Tax Vouchers OW-8-ESC Voucher 1 Amount of Payment hyperlink)
Form OW-8-P	Oklahoma forms NOT suppress in Organizer States Oklahoma Return Options Print Suppression + NOT suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oklahoma forms + Form OW-8-P Page 1 line 19 "Total penalty and interest" have data + Organizer States Oklahoma Underpayment Options Option 2 and 3 "Always print" checked
FormOK512Combined	
FormOK512FT	
FormOK512TI	
FormOK561C	
FormOK578	
Schedule K Equivalent	S-Corp is activated + Oklahoma is not suppressed on Organizer States Common State Print Suppression State Forms column "Oklahoma" checkbox + Not suppressed under Organizer States Oklahoma Return Options Print Suppression + Not suppressed under Organizer States Oklahoma Shareholder Information "Suppress the print of Schedule K-1 Equivalent

Schedule K-1 Equivalent	S-Corp is activated Oklahoma is not suppressed on Organizer States Common State Print Suppression State Forms column "Oklahoma" checkbox + Not suppressed under Organizer States Oklahoma Return Options Print Suppression + Not suppressed under Organizer States Oklahoma Shareholder Information "Suppress the print of Schedule K Equivalent
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Oregon

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

Form/Schedule

Requirement(s) to Print

Form OR-19

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab | State Forms column | Oregon row + The following option is not selected: Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Withholding Information | Print Suppression Options | OR-19 + The following is Yes for at least one owner: Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Owners | Member name | Non-electing Nonresident Owner Information | Nonresident not a member of an Oregon composite + The following is Yes for any owner meeting the above criteria: Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Owners | Owner name | Non-electing Nonresident Owner Information | Exclusions from OR-19 | No selection is made in this section.

Form OR-19-AF

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab | State Forms column | Oregon row + The following option is not selected: Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Withholding Information | Print Suppression Options | All OR-19-AFs + The following option is not selected: Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Owners | Owner name | Non-electing Nonresident Owner Information | Oregon Affidavit Nonresident Owner Information | Suppress print for this owner's OR-19-AF + Owner's information is entered at Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Owners | Owner name | Non-electing Nonresident Owner Information | Oregon Affidavit Nonresident Owner Information | Effective year, telephone number, agreement to file + One of the following is Yes: The following option is selected: Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Owners | Owner name | Non-electing Nonresident Owner Information | Exclusions from OR-19 | Filed OR-19-AF OR One of the following options is selected: Organizer | States | Oregon | Nonresident Owner Payments | Nonresident Owners | Owner name | Non-electing Nonresident Owner Information | Oregon Affidavit Nonresident Owner Information | Revocation of affidavit | One of the four options is selected

Form OR-19-V	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is not selected: Organizer States Oregon Nonresident Owner Payments Nonresident Withholding Information Print Suppression Options OR-19-V + An amount is entered at Tax Forms States Oregon Non-resident Owner Payments OR-19 Amount of payment column Payments 1 - 4
Form OR-20	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is not selected: Organizer States Oregon General Information Corporation Type (Mandatory) Income tax return (Form OR-20-INC)
Form OR-20-INC	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is selected: Organizer States Oregon General Information Corporation Type (Mandatory) Income tax return (Form OR-20-INC)
Form OR-20-INS	The following option is selected: Organizer States State and City Activation State and City Activation Col G, Insurance Return Form Type + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row
Form OR-20-S	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row
Form OR-20-V Estimate Payment	Estimates: The following option is not selected: Organizer States Common State Print Suppression Suppression MD-RI Oregon row Est Tax column + The following option is not selected: Organizer States Oregon Overpayment and Estimate Options Compute and Print Options Suppress print if no payments are due after applying overpayment + There is a net positive amount entered at Organizer States Oregon Overpayment and Estimate Options Payments on Next Year's Estimated Tax + The following option is not selected: Organizer States Oregon Overpayment and Estimate Options Estimate Option dropdown Suppress compute and print + One of the following is Yes: Tax Forms States Oregon OR-20-V - Estimates Drill down on Enter payment amount on any voucher On yellow screen, a positive amount exists on Estimated Tax Schedule Installment Amount column Total Estimate row OR Tax Forms States Oregon OR-20-V - Estimates Drill down on Enter payment amount on any voucher On yellow screen, a positive amount exists on Estimated Tax Schedule Payment Due column Total Estimate row

Form OR-20-V Extension Payment	The following option is selected: Organizer States Common State General Information Basic Return Information Return Information tab Return on Extension + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab Ext column Oregon row + There is an amount at Tax Forms States Oregon OR-20-V Extension Payment Voucher Enter payment amount
Form OR-20-V Return Payment	One of the following is Yes: Tax Forms States Oregon OR-20-V Other Tax Payments Original return or Amended return + Oregon e-file is enabled at Organizer States State e-file Enable/Create Returns Return tab Enable column Oregon row + The following option is selection: Organizer States Common State General Information Bank Information Direct Debit tab Tax Payment/Refund Method Check + Organizer States Common State General Information Bank Information Direct Debit tab Authorization to debit funds is not selected.
Form OR-21	Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Pass-through Entity Elective Return section Activate Pass-through Entity Elective return checkbox is selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21, Pass-through Entity Elective Rtn Page 1 Part B: Checkboxes One the following lines is selected: 1 Election, 2 Revocation, 3 Amended, 4 Extension
Form OR-21-V Estimate Payment	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is not selected: Organizer States Oregon Pass-through Entity Elective Return Payments of Tax Suppress Print of estimated vouchers + There is an amount on Tax Forms States Oregon OR-21, Pass-through Entity Elective Return OR-21-V - Estimates Enter payment amount on OR-21-V, Estimates 1-4
Form OR-21-V Extension Payment	An amount is entered at Tax Forms States Oregon OR-21, Pass-through Entity Elective Return OR-21-V, Extension Payment Voucher Payment amount field + Organizer States Pass-through Entity Elective Return) Payments of Tax Pass-through Elective Tax Extension Payment - OR-21-V Suppress print of extension voucher is not selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Return OR-21, Pass-through Entity Elective Rtn OR-21 Pg1 Part B: Checkboxes Line 4 Extension Payment is selected.
Form OR-21-V Return Payment	An amount is entered at Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21-V, Return Payment Payment amount field + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21-V, Return Payment Original Return checkbox or Amended Return checkbox is selected + Organizer States Common State General Information Bank Information Direct Debit tab Oregon Pass-through Entity Elective Column C Tax Payment Method Check or money order is selected.
Form OR-24	The following option is not selected: Organizer States Oregon Return Options Print Suppression OR-24 + At least one like-kind exchange is entered at Organizer States Oregon Like-Kind Exchange + Data appears at Tax Forms States Oregon OR-24-Oregon Like-Kind Exchange On the first line of Line 1 or Line 2

Form OR-37	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab Und of Est Tax column Oregon row + One of the following options is selected: Organizer States Oregon Underpayment Options Options to Compute and Print Underpayment Tax: Add penalty to tax and print form, if required or a penalty is due (Default) OR Always print form but do not add penalty OR Always print form and add penalty OR Print form with name only + An amount exists at Tax Forms States Oregon 37 - Underpayment of Estimated Tax Page 6 Line 21
Form OR-AF-CAT	Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information Print Options Activate Corporate Activity Tax Return checkbox is selected + Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-CAT - Corporate Activity Tax Return OR-CAT Pg2 Line F Combined Oregon return checkbox is selected + Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information Print Options Suppress OR-AF-CAT is not selected + Tax Forms States Oregon Selected Options Filing Type Top consolidation or Sub-consolidation checkbox is selected
Form OR-CAT	Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information General Information section Activate Corporate Activity Tax Return checkbox is selected
Form OR-CAT-V Estimate Payment	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row Estimates: The following option is not selected: Organizer States Oregon Corporate Activity Tax Payments of Tax Suppress Print of estimated vouchers + There is an amount on Tax Forms States Oregon OR-CAT-V - Estimates Enter payment amount on OR-CAT-V, Estimates 1-4
Form OR-CAT-V Extension Payment	An amount is entered at Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-CAT-V Extension Payment Voucher Payment amount field + Organizer States Oregon Corporate Activity Tax (OR-CAT) Payments of Tax Corporate Activity Tax Extension Payment - OR-CAT-V Suppress print of extension voucher is not selected + Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-CAT - Corporate Activity Tax Return OR-CAT Pg1 Header section Extension checkbox is selected.
Form OR-CAT-V Return Payment	An amount is entered at Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-CAT-V Other Tax Payments Payment amount field + Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-CAT-V Other Tax Payments Original Return checkbox or Amended Return checkbox is selected + Organizer States Common State General Information Bank Information Direct Debit tab Oregon Corporate Activity row Column C Tax Payment Method Check or money order is selected.
Form OR-DRD	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 +The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab Und of Est Tax column Oregon row + There is an amount at Tax Forms States Oregon OR-ASC-CORP Subtractions hyperlink Code 370 Dividend deduction

Form OR-EXC-CAT	Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information General Information section Activate Corporate Activity Tax Return checkbox is selected + Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-CAT - Corporate Activity Tax Return OR-CAT Pg3 Line 2 is populated
Form OR-EXT-CAT	9/04/2024 Updated guidance: For tax years beginning on or after January 1, 2024, a seven-month extension to file the CAT return is available. Taxpayers don't need to show good cause to obtain a filing extension. An extension to file isn't an extension to pay. CAT taxpayers who have an extension to file their federal income tax return from the IRS will automatically be allowed a seven-month extension to file their CAT return. If you have obtained a federal extension, you don't need to request a separate extension to file for CAT. Taxpayers are not required to submit a copy of their federal extension in order to obtain an extension for CAT. However, taxpayers must retain a copy of the federal extension and provide to Oregon Department of Revenue upon request. 4/22/2022 Updated guidance: This form is available in our software effective with release 21-4.5F on 4/22/2022. Print conditions are: Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information General Information section Activate Corporate Activity Tax Return checkbox is selected + Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-CAT - Corporate Activity Tax Return OR-CAT Pg1 Header section Extension checkbox is selected - OR - Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information Print Options Force-print OR-CAT-EXT is selected + Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information General Information section Print Options Suppress OR-CAT-EXT is not selected.
Form OR-FCG-20	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab Und of Est Tax column Oregon row + The following option is not selected: Organizer States Oregon Return Options Print Suppression OR-FCG-20 + The following option is not selected: Organizer States Oregon General Information Corporation Type (Mandatory) Income tax return (Form OR-20-INC) + The following option is selected: Organizer States Oregon Farm LT Capital Gains Farm assets used in regular business
Form OR-OC/OR-OC-1 & OR-OC-2	OR-OC, OR-OC-1, OR-OC-2: The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is selected: Organizer States Oregon Composite Return General Information "Print Oregon Composite Return OR-OC-1: Shareholder is a nonresident + One of the following selections is made: Organizer States Oregon Composite Return Nonresident Shareholder Shareholder name Type of Owner (Mandatory) is Individual, Estate or Trust OR-OC-2: Shareholder is a nonresident + The following option is selected: Organizer States Oregon Composite Return Nonresident Shareholder Shareholder name Type of Owner (Mandatory) is Corporation

Form OR-OC-TR

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab | State Forms column | Oregon row + The following option is selected: Organizer | States | Oregon | Composite Return | General Information | "Print Oregon Composite Return + Shareholder is a nonresident + The following option is selected: Organizer | States | Oregon | Composite Return | Nonresident Shareholder | Shareholder name | "Shareholder not included in composite filing

Form OR-OC-V Estimate Payment

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab | State Forms column | Oregon row + The following option is selected: Organizer | States | Oregon | Composite Return | General Information | Print Oregon Composite Return Estimates: The following option is not selected: Organizer | States | Oregon | Composite Return | Payments of Tax | Composite Estimated Payments | Suppress Print of estimated vouchers + There is an amount on Tax Forms | States | Oregon | OR-OC - Oregon Composite Return | OR-OC-V - Estimates | Enter payment amount on OR-OC-V, Estimates 1-4

Form OR-OC-V Extension Payment

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab | State Forms column | Oregon row + The following option is selected: Organizer | States | Oregon | Composite Return | General Information | Print Oregon Composite Return + The following option is not selected: Organizer | States | Oregon | Composite Return | Payments of Tax | Composite Extension Payment | Suppress Print of extension voucher + There is an amount on Tax Forms | States | Oregon | OR-OC - Oregon Composite Return | OR-OC-V, Extension Payment | Enter payment amount + The following option is selected: Organizer | States | Common State | General Information | Basic Return Information - S Corp | Return Information tab | Column O Return on Extension.

Form OR-OC-V Return Payment

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab | State Forms column | Oregon row + The following option is selected: Organizer | States | Oregon | Composite Return | General Information | Print Oregon Composite Return + One of the following is Yes: Tax Forms | States | Oregon | OR-OC - Oregon Composite Return | OR-OC-V, Return Payment | Original return or Amended return+ There is an amount at Tax Forms | States | Oregon | OR-OC - Oregon Composite Return | OR-OC-V, Return Payment | Enter payment amount + Organizer | States | State E-file | Enable/Create Returns | Return tab | Oregon Composite row | Column C Enable must be selected + Organizer | States | Common State | General Information | Bank Information - S-Corp | Direct Debit tab | Oregon row | Check or money order must be selected.

Form OR-QUP-CAT	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is not selected: Organizer States Oregon Corporate Activity Tax (OR-CAT) General Information Print Options Suppress OR-QUP-CAT + The following field has data: Tax Forms States Oregon OR- CAT Corporate Activity Tax Return OR-QUP-CAT-Underpayment of CAT Est Tax OR-QUP-CAT Pg5 Line 21
Schedule K Equivalent	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab K-1 Equiv column Oregon row
Schedule K-1 Equivalent	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab K-1 Equiv column Oregon row + Shareholder name is entered at Organizer States Common State Schedule K / K-1 Equivalents Shareholder Information Shareholder name + The following option is not selected: Organizer States Oregon Shareholder Information Shareholder name Suppress the print of Schedule K-1 Equivalent
Schedule OR-21-AP	Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Pass-through Entity Elective Return section Activate Pass-through Entity Elective return checkbox is selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21, Pass-through Entity Elective Rtn Page 3 Line 19 Oregon apportionable income is<100
Schedule OR-21-K-1	Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Pass-through Entity Elective Return section Activate Pass-through Entity Elective return checkbox is selected + Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Print Options section Suppress print for all OR-21-K-1s is not selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21, Pass-through Entity Elective Rtn Page 1 Part B: Checkboxes One the following lines is selected: 1 Election, 2 Revocation, 3 Amended, 4 Extension
Schedule OR-21-MD	Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Pass-through Entity Elective Return section Activate Pass-through Entity Elective return checkbox is selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21, Pass-through Entity Elective Rtn Page 1 Part B: Checkboxes Line 1 Election is selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21, Pass-through Entity Elective Rtn Page 3 Part D Line 23 PTE Elective Tax is greater than NONE

Schedule OR-21-MD-PT	Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Pass-through Entity Elective Return section Activate Pass-through Entity Elective return checkbox is selected + Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Print Options section Suppress print for OR-21-MD-PT is not selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21, Pass-through Entity Elective Rtn Page 2 Part B, continued Line 5 Pass through is selected + Tax Forms States Oregon OR-21, Pass-through Entity Elective Rtn OR-21, Pass-through Entity Elective Rtn Page 1 Part B: Checkboxes Line 2 Revocation is not selected
Schedule OR-21-REF	Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Pass-through Entity Elective Return section Activate Pass-through Entity Elective return checkbox is selected + Organizer States Oregon OR-21, Pass-through Entity Elective Return General Information Request for Refund section Payment date and amount are entered for at least one payment
Schedule OR-AF	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression MD-RI tab State Forms column Oregon row + The following option is not selected: Organizer States Oregon General Information Corporation Type (Mandatory) Income tax return (Form OR-20-INC) + Entity type is Top Consolidation or Sub consolidation at Organizer States State and City Activation Col. E, Entity Type + There is at least one member marked as entity type Subsidiary + Subsidiary is not excluded from Schedule OR-AF via Organizer States Oregon Combined Return Information Required Input Line 5
Schedule OR-AP	One of the following applies: C Corp and Tax Forms States Oregon OR-20 - Excise Tax Return OR-20-Pg3 Line 8 is is less than 100% OR The following option is selected: Organizer States Oregon General Information Corporation Type (Mandatory) Income tax return (Form OR-20-INC) + Tax Forms States Oregon OR-20-INC - Income Tax Return OR-20-INC Pg3 Line 6 is less than 100% OR S Corp and Tax Forms States Oregon OR-20 - S - S Corp. Income Tax Return OR-20-S Pg3 Line 6 is less than 100% OR Insurance return and Tax Forms States Oregon Insurance OR-20-INS-Oregon Ins Excise Tax Return OR-20-INS, Pg3 Line 13 is less than 100%
Schedule OR-ASC-CORP	Amounts exist at Tax Forms States Oregon OR-ASC-CORP Drill down on any blue hyperlink Additions or Subtractions or Standard Credits or Carryforward Credits/any column
Schedule OR-PI	Schedule AP applies + Organizer States Oregon Allocation and Apportionment Partnership Informaton Oregon Sales column is populated and/or Everywhere Sales column is populated.

Oregon Cities/Counties: Portland/Multnomah

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

Form/Schedule

Requirement(s) to Print

BIT-V Estimates

The following option is selected: Organizer | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | General Information | Activate METBIT return + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities | Est Tax column | Multnomah AND Portland rows + The following option is not selected: Organizer | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | Payments of Tax | Metro Supportive Housing Services Estimated Payments - BIT-V | Suppress print of estimated vouchers + Amounts are entered at Organizer | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | Payments of Tax | Metro Supportive Housing Services Estimated Payments - BIT-V | Estimated tax payments row.

BIT-V Extension

The following option is selected: Organizer | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | General Information | Activate METBIT return + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities | Ext Tax column | Multnomah AND Portland rows + The following option is not selected: Organizer | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | Payments of Tax | Metro Supportive Housing Services Extension Payment - BIT-V | Suppress print of extension voucher + An amount is entered at Organizer | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | Payments of Tax | Metro Supportive Housing Services Extension Payment - BIT-V | Payment amount row.

BIT-V Return Payment

The following option is selected: Organizer | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | General Information | Activate METBIT return + The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities | State Forms column | Multnomah AND Portland rows + Tax Forms | Cities | Portland/Multnomah, OR | Tax Forms | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | BIT-V Other Tax Payment | Original return - or - Amended return is selected + Tax Forms | Cities | Portland/Multnomah, OR | Metro Supportive Housing Tax Return | BIT-V Other Tax Payment | Payment Amount is populated.

BZT-V Extension

The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities | State Forms column | Multnomah AND Portland rows + The following option is selected: Organizer | Cities | Portland/Multnomah, OR | Return Options | Return on extension + There is an amount at Tax Forms | Cities | Portland/Multnomah, OR | BZT-V Extension Payment Voucher | Payment Amount + Organizer | Cities | Portland/Multnomah, OR | Return Options | Print Suppression | Form EXT is not selected.

BZT-V Return Payment

The following option is not selected: Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities | State Forms column | Multnomah AND Portland rows + Tax Forms | Cities | Portland/Multnomah, OR | BZT-V Other Tax Payments | Original return - or - Amended return is selected + Tax Forms | Cities | Portland/Multnomah, OR | BZT-V Other Tax Payments | Payment Amount is populated.

Form BZT-V Estimates	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression SC-Cities Est Tax column Multnomah AND Portland rows + The following option is not selected: Organizer Cities Portland/Multnomah, OR Overpayment and Estimate Options Estimated Tax tab Suppress compute and print + There are amounts entered at Organizer States Common State Estimates and Extensions Payments of Tax tab Multnomah County/Portland, OR + One of the following is Yes: Tax Forms Cities Portland/Multnomah, OR Main form Drill down on Refund hyperlink On yellow screen, a positive amount exists on Estimated Tax Schedule Installment Amount column Total Estimate row OR Tax Forms Cities Portland/Multnomah, OR Main form Drill down on Refund hyperlink On yellow screen, a positive amount exists on Estimated Tax Schedule Payment Due column Total Estimate row
Form C-XXXX	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression SC-Cities State Forms column Multnomah AND Portland rows + C Corp
Form EXT	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression SC-Cities State Forms column Multnomah AND Portland rows + The following option is selected: Organizer Cities Portland/Multnomah, OR Return Options Return on extension + There is an amount at Tax Forms Cities Portland/Multnomah, OR EXT - Extension Request Line 4 + Organizer Cities Portland/Multnomah, OR Return Options Print Suppression Form EXT is not selected.
Form METBIT-20	The following option is selected: Organizer Cities Portland/Multnomah, OR Metro Supportive Housing Tax Return General Information Activate METBIT return + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression SC-Cities State Forms column Multnomah AND Portland rows + C Corp return.
Form METBIT-20	
Form METBIT-20S	The following option is selected: Organizer Cities Portland/Multnomah, OR Metro Supportive Housing Tax Return General Information Activate METBIT return + The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression SC-Cities State Forms column Multnomah AND Portland rows + S Corp return.
Form SC-XXXX (S Corp)	The following option is not selected: Organizer States Common State Print Options Print Suppression Suppression SC-Cities State Forms column Multnomah AND Portland rows + S Corp

Pennsylvania

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

Form/Schedule

Requirement(s) to Print

Form 20S/65

The following option is selected: Organizer | States | State and City Activation | State and City Activation | Return Type | 1120S + The following option is not selected: Organizer | States | Pennsylvania | Return Options | Print Suppression | Form PA-20S

Form 860, Schedule C-5, OA, and OD	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + One of the following conditions is met: (An amount exists at Tax Forms States Pennsylvania REV-860 - Sch C-5, OA and OD, line 17 OR An amount exists at Tax Forms States Pennsylvania REV-860 - Sch C-5, OA and OD, Schedule OA OR An amount exists at Tax Forms States Pennsylvania REV-860 - Sch C-5, OA and OD, Schedule OD)
Form PA 40-NRC	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is selected: Organizer States Pennsylvania Shareholder Information "Shareholder is included in the composite return (PA-40NRC)
Form PA 40-NRC-I	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following fields have data: (Tax Forms States Pennsylvania Composite Return PA-40 NRC "Number of Nonresidents electing to file on this return + Tax Forms States Pennsylvania Composite Return PA-40 NRC-I)
Form PA-20S (S Corp)	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is not selected: Organizer States Pennsylvania Return Options Print Suppression Form PA-20S
Form PA-S Supplemental Schedules A, B, E, H, M	Schedule A: Tax Forms States Pennsylvania Schedule A - Interest Income Line 8 should have data Schedule B: Tax Forms States Pennsylvania Schedule B - Dividend/Capital Gains Line 9 should have data Schedule E: Organizer States Pennsylvania S Corporation Forms Rent and Royalty Schedule E General Information Check the box "Prepare Schedule E Schedule H: Tax Forms States Pennsylvania Schedule H - Apportionment Formula Line 5 has data OR Tax Forms States Pennsylvania Schedule J "Total Estate or Trust Income" has data Schedule M Part A: Column A on line 3 or line 6 or line 9 or line 11 or line 12 has data Schedule M Part B: Tax Forms States Pennsylvania Schedule M - Reconciliation of Federal PA Schedule M, Page 2B Section G has data OR Tax Forms States Pennsylvania Schedule M - Reconciliation of Federal PA Schedule M, Page 2B Section A has data
Form RCT-101	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is not selected: Organizer States Pennsylvania Return Options Print Suppression Form RCT-101
Form RCT-101KOZ	The following field has data: Tax Forms States Pennsylvania RCT-101 KOZ "Credit Percentage"
Form RCT-103	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + One of the following field has data (Tax Forms States Pennsylvania RCT-103 - Net Operating Loss Current Tax Year Total field OR Any field on column B (Tax Period Ending))
Form RCT-106	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + Any field has data on the form
Form RCT-132	
Form RCT-143	

Form REV-414	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S The following option is selected: Organizer States Pennsylvania S Corporation Forms Withholding Tax Worksheet "Print REV-414 -Nonresident Withholding Tax Worksheet"
Form REV-545	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + One of the following fields has data: (Tax Forms States Pennsylvania REV-545 - Research and Development Cr Line 1 Annualized OR Tax Forms States Pennsylvania REV-545 - Research and Development Cr. Line 4 Annualized)
Form REV-799	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is NOT selected: Organizer States Pennsylvania Return Options Print Suppression "Form REV-799 + The following field has data: Tax Forms States Pennsylvania REV-799 - Schedule C-3 Column C "Current Year Bonus Depreciation"
Form REV-853R	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is selected: Organizer States Common State Estimates and Extensions On Extension
Form REV-854R	The following option is NOT selected: Organizer States Pennsylvania Return Options Print Suppression "Form REV-854"
Form REV-857R	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 +The following option is NOT selected: Organizer States Pennsylvania Return Options Print Suppression "Form REV-857"
Form REV-934	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following field has data: Tax Forms States Pennsylvania REV-934 Schedule of Non-Business Income Line 7
Form REV-986	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is NOT selected: Organizer States Pennsylvania Return Options Print Suppression "Form REV-986"
FormREV1175SchAR	
FormREV1834SchC8, FormREV1834SchC9	
FormREV798SchX, FormREV798SchC2	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120 + The following option is NOT selected: Organizer States Pennsylvania Return Options Print Suppression "Form REV-798 + One of the following fields has data: (Tax Forms States Pennsylvania REV-798 CT - Sch. C-2 and Sch. X Line 6 OR Tax Forms States Pennsylvania REV-798 CT - Sch. C-2 and Sch. X Schedule X part)
FormREV861SchDA	

PA65SchNRK1	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is NOT selected: Organizer States Pennsylvania Return Options - "Form RK-1 and NRK-1 + The following field has data: Tax Forms States Pennsylvania Shareholder Schedules Resident Schedules - Business name field has data + The following condition is met: Organizer Shareholder Information Shareholder Data Shareholder Information - "State of residency" is Pennsylvania
PA65SchRK1	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is NOT selected: Organizer States Pennsylvania Return Options - "Form RK-1 and NRK-1 + The following field has data: Tax Forms States Pennsylvania Shareholder Schedules Nonresident Schedules - Business name field has data + The following condition is met: Organizer Shareholder Information Shareholder Data Shareholder Information - "State of residency" is not Pennsylvania
Schedule A	
Schedule B	
Schedule D Part I	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following field has data: Tax Forms States Pennsylvania Schedule D - Sale, Exchange or Disposit Sch D, Page 1, Line 18
Schedule D Part II	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following field has data: Tax Forms States Pennsylvania Schedule D - Sale, Exchange or Disposit Sch D, Page 2, has any entity
Schedule D Part III	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following field has data: Tax Forms States Pennsylvania Schedule D - Sale, Exchange or Disposit Sch D, Page 3, line 16
Schedule D Part IV	Tax Forms States Pennsylvania Schedule D - Sale, Exchange or Disposit Sch D, Page 4, has any entity
Schedule Directory	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The form has data: Tax Forms States Pennsylvania Composite Return PA-40 NRC-I
Schedule E	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is selected: Organizer States Pennsylvania S Corporation Forms Rent and Royalty Schedule E General Information - "Prepare Schedule E
Schedule H	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + One of the following fields has data: (Tax Forms States Pennsylvania Schedule H - Apportionment Formula Line 5 has data OR Tax Forms States Pennsylvania Schedule J "Total Estate or Trust Income" has data)

Schedule J	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following field has data: Tax Forms States Pennsylvania Schedule J "Total Estate or Trust Income" has data
Schedule M	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + One of the following fields has data: (Column A on line 3 or line 6 or line 9 or line 11 or line 12 has data OR Tax Forms States Pennsylvania Schedule M - Reconciliation of Federal PA Schedule M, Page 2B Section G has data OR Tax Forms States Pennsylvania Schedule M - Reconciliation of Federal PA Schedule M, Page 2B Section A has data)
Schedule NW, Page 1	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following field has data: Tax Forms States Pennsylvania Schedule NW - "Total Nonresident withholding payment
Schedule NW, Page 2	
Schedule OC	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + One of the following fields has data: (Tax Forms States Pennsylvania Schedule OC - Line 17 "Total PA Other Credits OR Tax Forms States Pennsylvania Schedule T - Line 5 "Total gambling and lottery winnings" Column A)
Schedule T	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + One of the following fields has data: (Tax Forms States Pennsylvania Schedule T- Line 5 "Total gambling and lottery winnings" Column A OR Tax Forms States Pennsylvania Schedule T- Line 5 "Total gambling and lottery winnings" Column B)
SchKOZ	The following option is selected: Organizer States State and City Activation State and City Activation Return Type 1120S + The following option is selected: (Tax Forms States Pennsylvania Schedule P-S KOZ Schedule P-S KOZ "KOZ Exemption of Income Calculation OR Tax Forms States Pennsylvania Schedule P-S KOZ Schedule P-S KOZ "SDA" Exemption of Income Calculation")
SchRev276	
SchREV802, SchREV803	

Pennsylvania Cities: Philadelphia

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

Form/Schedule

Requirement(s) to Print

BPT Payment & Extension	The following option is selected: Organizer States State and City Activation State and City Activation + (The following option is not selected: Organizer Cities Philadelphia, PA Return Options Print Suppression - "City forms OR Organizer Cities Philadelphia, PA Return Options Force Print) + The following option is selected: Organizer States Common State Estimates and Extensions
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BPT Schedule A, B, C-1, D, E Schedule A: Organizer | Cities | Philadelphia, PA | General Information | Select "Method 1 Schedule B: Organizer | Cities | Philadelphia, PA | General Information | Select "Method 2 Schedule C-1: Tax Forms | Cities | Philadelphia, PA | BIRT - Business Income and Receipts Tax | Schedule C-1 Schedule D: Organizer | Cities | Philadelphia, PA | Return Options| Print Suppression | Do not select Schedule D Schedule E: Organizer | Cities | Philadelphia, PA | General Information | Select "Method 1 + Organizer | Cities | Philadelphia, PA | General Information | Type of Business selected

Form BPT/BPT-EZ The following option is selected: Organizer | States | State and City Activation | State and City Activation | + (The following option is selected: Organizer | Cities | Philadelphia, PA | Return Options | Print Suppression - "City forms" Not selected OR Organizer | Cities | Philadelphia, PA | Return Options| Force Print) + Organizer | Cities | Philadelphia, PA | General Information | BIRT or BIRT EZ

Form KOZ Tax Forms | Cities | Philadelphia, PA | KOZ Forms | KOZ Page 1| Line 10 selected

FormCOPBPTEZ

FormCOPBPTLF

Puerto Rico

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

Form/Schedule

Requirement(s) to Print

Form 480.20(U) Insurance Return + Only 1120 PC return + Subject to effectively connected income source rules (ECISR) on Organizer | Puerto Rico | Effect. Connected Income Source Rules

Form 480.40F Insurance Return + (Only 1120 L return OR 1120 L FEIN on Tax Forms | 480.40-F | Page 1

Form AS 2879 Insurance Return + Tax Form | AS 2879 | Line 11 has to have value greater than zero

Form AS 6042.1 Deduction for Contributions Information entered on Organizer | Puerto Rico | Deduction for Contribution

Form SC 2644 Insurance Return + Return is on extension on Organizer | Common State | General Information | Estimates and Extension | Extension tab + (Amount on line 1 OR Amount on line 2 OR Amount on line 3) on Tax Forms | SC 2644 | Part II

Schedule B Insurance Return + Line 26 must has value greater than zero on Tax Form | Puerto Rico | Schedule B | Page 1 | Part II

Schedule D Insurance Return + (Page 1 to print Line 5 must has value greater than zero on Tax Forms | Puerto Rico | Schedule D | Page 1 | Part I OR Line 10 must has value greater than zero on Tax Forms | Puerto Rico | Schedule D | Page 1 | Part II OR Line 11 must has value greater than zero on Tax Forms | Puerto Rico | Schedule D | Page 1 | Part II) + (Page 2 to print Line 21 must has value greater than zero on Tax Form | Puerto Rico | Schedule D | Page 2 | Part IV OR Line 22 must has value greater than zero on Tax Forms | Puerto Rico | Schedule D | Page 2 | Part V OR Line 23 must has value greater than zero on Tax Forms | Puerto Rico | Schedule D | Page 2 | Part VI) +(Page 3 to print Line 10 column E must has value greater than zero on Tax Forms | Puerto Rico | Schedule D | Page 3 | Part VII

Schedule E	Insurance Return + Tax Forms Schedule E Total has to have a value greater than zero
Schedule Q	Insurance Return + (Page 1 to print Line 4 must has value greater than zero on Tax Forms Puerto Rico Schedule Q Page 1 Part I) + (Page 2 to print Line 10 must has value greater than zero on Tax Forms Puerto Rico Schedule Q Page 2 Part III OR Line 12 must has value greater than zero on Tax Forms Puerto Rico Schedule Q Page 2 Part IV)
Schedule Q1	Insurance Return + (Page 1 to print Line 16 must has value greater than zero on Tax Forms Puerto Rico Schedule Q1 Page 1 Part II) + (Page 2 to print Line 1 Part II column F must has value greater than zero on Tax Forms Puerto Rico Schedule Q1 Page 2 Part II OR Page 2 to print Line 1 Part III column F must has value greater than zero on Tax Forms Puerto Rico Schedule Q1 Page 2 Part III OR Page 2 to print Line 1 Part IV column F must has value greater than zero on Tax Forms Puerto Rico Schedule Q1 Page 2 Part IV)
Schedule T	Insurance Return + (Line 21 Section B OR Underpayment of estimated tax is 2 on Organizer Puerto Rico Underpayment Options OR Underpayment of estimated tax is 3 on Organizer Puerto Rico Underpayment Options OR Underpayment of estimated tax is 5 on Organizer Puerto Rico Underpayment Options

Rhode Island

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

Form/Schedule

Requirement(s) to Print

Form 2874

Form 2949

Form 3468

Form 6324

Form 8826

Form 9261

Form BUS-EST

Not suppressed on Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab. + The return is not marked as final return on Organizer | States | Common State | General Information | Basic Return Information | Return Information tab, column H. + The option to only print vouchers with amounts is not selected on Organizer | States | Common State | Tax Estimate Options | Estimated Tax Options. + Print is not suppressed on Organizer | States | Rhode Island | Overpayment and Estimate Options.

Form K-1

Not suppressed on Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab. + Print is not suppressed on Organizer | States | Rhode Island | Shareholder Information | Shareholder Information. + Shareholder's name must be entered on Organizer | Shareholder Information | Shareholder Data | Shareholder Information | Shareholder Information.

Form RI-1120C

Not suppressed on Organizer | States | Common State | Print Options | Print Suppression | Suppression MD-RI tab. + Print is not suppressed on Organizer | States | Rhode Island | Return Options. + C-Corporation.

Form RI-1120S	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + S-Corporation.
Form RI-1120V	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + (There is an amount on line 22 on Tax Forms States Rhode Island RI-1120 C - Tax Return RI-1120C, Page 2 tab. OR + There is an amount on line 13 on Tax Forms States Rhode Island RI-1120S - Tax Return RI-1120S, Page 1 tab.) + The return is not a Banking Institution Excise Tax Return.
Form RI-2220	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + The return is not a Banking Institution Excise Tax Return. + (There is an amount on line 12 on Tax Forms States Rhode Island RI-2220 - Underpayment of Tax. OR + Option 2 or 3 is selected on Organizer States Rhode Island Underpayment Options.)
Form RIBusExt	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + (There is an "Amount Enclosed" on Tax Forms States Rhode Island RI BUS-EXT - Extension. OR + The return is marked as being on extension on Organizer States Common State General Information Basic Return Information Return Information tab, column N.) + The return is not a Banking Institution Excise Tax Return.
Form T-74	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + "Financial Return" check box is selected on Organizer States State and City Activation State and City Activation.
Form2441	
SchB_CR	
SchCGM	
SchCRPT	
Schedule K Equivalent	Not suppressed on Organizer States Common State Print Options Print Suppression Suppression MD-RI tab. + S-Corporation return.
SchPTW	Schedule PTW Page 1, line 13 or Page 2, line v has data
SchQ_Sub	Q-Sub Schedule Q-Sub Name has data

South Carolina

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

Form/Schedule

Requirement(s) to Print

Form I-335	Generate Form I-335 need to check on the Organizer South Carolina Active Trade or Business Income I-335 (Active Trade or Business Income Reduced Rate Computation section
Form I-335B Worksheet 2	Generate Form I-335 need to check on the Organizer South Carolina Active Trade or Business Income I-335 (Active Trade or Business Income Reduced Rate Computation section + included in Schedule NR.
Form SC I-435	Checked box for Active Trade or Business election on the Tax form South Carolina SC1120S Page 1 + Amount on line 14 or line 17 of I-435.

Form SC K	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" SC + this prints with the SC S-corp return as page 5
Form SC1101B	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" SC + Options to select SC state return and the financial return under Organizer States State and City Activation State and City Activation + Corporate return only
Form SC1120	Option to suppress is not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina not a financial return + Not checked the box to Activate Public Utilities Tax Return on the Organizer South Carolina Public Utility Tax Return
Form SC1120-CDP	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina + Valid estimate options selected on Organizer States Common State Tax Estimate Options Estimated Tax Options + Organizer States South Carolina Overpayment and Estimate Options Estimated Tax Compute and Print Options Suppress print if no payments are due after applying overpayment is not marked
Form SC1120S (S Corp)	Option to suppress is not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina
Form SC1120-T	Option to suppress is not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina + Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina tab Ext is not selected for South Carolina + South Carolina "On Extension" selected on Organizer States Common State Estimates and Extensions and on the first tab "Extension + Amount exists on line 3 "Balance due Remitted "
Form SC1120-TC	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina + Any column total for Page 1, line 13 or Page 2, line 7.
Form SC1120U	If C Corp + checked the box to Activate Public Utilities Tax Return on the Organizer South Carolina Public Utility Tax Return
Form SC1120-V	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" SC + South Carolina e-file has to be selected + Balance remitted must have an amount
Form SC1120-WH	Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina + Amount on line 1 "Amount from line 5 of SC1120S (less allocated income) + Amount on line 2 from within the statement " Line 1 times "Amount" of income allocated to nonresident shareholders

Form SC2220	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina + Organizer States Common State Print Options Print Suppression Suppression SC-Cities - Und of Est Tax is not selected for South Carolina + Organizer States South Carolina Underpayment Options Option to Compute and Print Underpayment Penalty Suppress penalty computation and do not print form is not selected + Amount on Part IV for the total
Form SC8453C	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina + South Carolina e-file has to be selected
Form SC-K-1	Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" South Carolina + South Carolina K-1 Equiv checkbox is not checked + Shareholder name exists on the schedule
SC-1099 MISC	Not suppress print Form SC 1099 MISC on the Organizer South Carolina Return Options Print Suppression + Nonresident shareholder
Schedule TC-38	At least one of Type of system installed need to checked + Line 10 need to have amount.
Schedule TC-4	Total employees on Page 1 Line 1 + Allowable credit on Page 2 Line 19
Schedule TC-4P	Total employees on Page 1 Line 1 + Allowable credit on Page 2 Line 19
Schedule TC-4SA	Page 1 Part I need to answer Yes + TC-4SA need to checked under Form used on the Organizer South Carolina Credits Schedule TC-4SA & TC-4SB.
Schedule TC-4SB	Page 1 Part I need to answer Yes + TC-4SB need to checked under Form used on the Organizer South Carolina Credits Schedule TC-4SA & TC-4SB.
SchSC1120AandB	
SchSC1120C	
SchSC1120D	
SchSC1120E	
SchSC1120F	
SchSC1120G	
SchSC1120H1	
SchSC1120H2	
SchSC1120H3	
SchSC1120J	
SchSC1120L	
SchSC1120M	
SchSC1120N	
SchSC1120SF	
SchSC1120SL	

Tennessee

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

Form/Schedule

Requirement(s) to Print

Form 188

Form FAE 170

Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return

Form FAE 170, SchA

Form FAE 170, SchB

Form FAE 170, Schedule T

Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + FAE 170 Schedule T line 11 has data + OR Tax Forms | States | Tennessee | Selected Options | Other Options | Force Print Schedule T

Form FAE 170, Schedules M and R

Sch M: + Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + FAE 170 Schedule M line 8 or 9 has data Sch N-R: Tennessee is activated on the State and City Activation Organizer + TN State Forms are NOT suppressed on the Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return AND Tax Forms | States | Tennessee | Selected Options | Other Options | Suppress Print of Schedules N,O,P,R is not selected AND Tax Forms | States | Tennessee | FAE 170 - Schedules M Through R | FAE 170, Sch M-R pg 2 | Schedule N Line 17 Franchise or Excise has data OR Tax Forms | States | Tennessee | FAE 170 - Schedules M Through R | FAE 170, Sch M-R pg 2 | Schedule O, P or R line 4 has data

Form FAE 170, SchG

Form FAE 172

Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities | Est for TN is not selected + FAE 172 has data

Form FAE 173

TN State Forms are NOT suppressed on the Common State | Print Suppression Organizer + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities | Tennessee Ext Tax not selected + (Tax Forms | States | Tennessee | FAE 173 - Extension | Line 4 has data OR (Force Print is selected AND TN is on Extension))

Form FAE 174

Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is selected: Organizer | States | State and City Activation | State and City Activation | Financial Return

Form FAE 174 NC	Tennessee State Forms are NOT suppressed on Organizer States Common State Print Suppression + The following option is selected: Organizer States State and City Activation State and City Activation Financial Return + Organizer State Financial Tennessee Financial General Information Affiliated group members elect to compute consolidated net worth is checked + Organizer State Financial Tennessee Financial General Information Affiliated group members of a financial institution affiliated group elect to calculate apportionment Schedule 174SC is selected + Tennessee marked to combine
Form FAE 174 SC	Tennessee State Forms are NOT suppressed on Organizer States Common State Print Suppression + The following option is selected: Organizer States State and City Activation State and City Activation Financial Return + Organizer State Financial Tennessee Financial General Information Affiliated group members elect to compute consolidated net worth is checked + Organizer State Financial Tennessee Financial General Information Financial institutions elect to calculate the consolidated net worth apportionment schedule 174NC is selected + Tennessee marked to combine
Form FAE170, FormIE	
Form FAE170, SchBP	
Form FAE170, SchBPCF	
Form FAE170, SchBR	
Form FAE170, SchBRCF	
Form FAE170, SchC	
Form FAE170, SchD	
Form FAE170, SchE	
Form FAE170, SchF1	
Form FAE170, SchF2	
Form FAE170, SchG	
Form FAE170, SchH	
Form FAE170, SchJ	
Form FAE170, SchJ1	
Form FAE170, SchJ2	
Form FAE170, SchJ3	
Form FAE170, SchJ4	
Form FAE170, SchK	
Form FAE170, SchN	
Form FAE170, SchN1	
Form FAE170, SchNC	
Form FAE170, SchNC1	

Form FAE170, SchO

Form FAE170, SchP

Form FAE170, SchPL

Form FAE170, SchPLCF

Form FAE170, SchQP

Form FAE170, SchQPCF

Form FAE170, SchS

Form FAE170, SchSC

Form FAE170, SchSF

Form FAE170, SchU

Form FAE170, SchV

Form FAE170, SchX

Form FAE174, FormIE

Form FAE174, SchA

Form FAE174, SchB

Form FAE174, SchC

Form FAE174, SchD

Form FAE174, SchE

Form FAE174, Schedule U and V Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return AND Tax Forms | States | Tennessee | Selected Options | Other Options | Suppress Print of Loss Carryover Schedules is not selected AND Tax Forms | States | Tennessee | FAE 170 - Schedules U and V | FAE 170, Sch U and Sch V | Schedule U Total Amount has data OR Tax Forms | States | Tennessee | FAE 170 - Schedules U and V | FAE 170, Sch U and Sch V | Schedule V Total Amount has data

Form FAE174, Schedule X Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + Tax Forms | States | Tennessee | FAE 170 - Schedule X | Part 1 or 2 Total fields have data

Form FAE174, SchF1

Form FAE174, SchF2

Form FAE174, SchFandSF

Form FAE174, SchG

Form FAE174, SchH

Form FAE174, SchJ

Form FAE174, SchJ1

Form FAE174, SchJ2

Form FAE174, SchJ3

Form FAE174, SchJ4

Form FAE174, SchK

Form FAE174, SchM

Form FAE174, SchN

Form FAE174, SchN1

Form FAE174, SchNC1

Form FAE174, SchPL

Form FAE174, SchPLCF

Form FAE174, SchSE

Form FAE174, SchT

Form183

Intangible Expense
Disclosure Form

Tennessee State Forms are NOT suppressed on Organizer | States | Common State | Print Suppression + The following option is not selected: Organizer | States | State and City Activation | State and City Activation | Financial Return + Tax Forms | States | Tennessee | Intangible Expense Disclosure Form | Intangible Disclosure form | Line 1 has data

Texas

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

Form/Schedule

Requirement(s) to Print

Form 05-102

Texas is not suppressed on Organizer | States | Common State | Print Suppression, "State Forms" column, "Texas" checkbox + All severe diagnostics have been cleared + Not suppressed on Organizer | State Franchise Tax | Texas Franchise | Return Options | Print Suppression + "Yes" checked on Organizer | State Franchise Tax | Texas Franchise | General Information | General Information | "Corporation, LLC, professional association..." + Final Return not checked on Organizer | States | Common State | General Information | Basic Return Information | Return Information tab | Final Return + "This entity does not have NEXUS in Texas" not checked on Organizer | State Franchise Tax | Texas Franchise | General Information | General Information + Taxpayer number required + Report year required + Diagnostics cleared

Form 05-158

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 on Organizer | State Franchise Tax | Texas Franchise | General Information | General Information + Diagnostics cleared

Form 05-160	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 on 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 on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared
Form 05-163	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 on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared
Form 05-164	Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Return on extension checked on Organizer States Common State General Information Basic Return Information Return Information Return on extension OR on 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 not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Combined report checked on Organizer State Franchise Tax Texas Franchise General Information General Information Combined Report + Affiliate detail exists on Organizer State Franchise Tax Texas Franchise Combined Return Information Affiliate Detail + Return on extension checked on Organizer States Common State General Information Basic Return Information Return Information Return on extension OR Regular extension or first extension mandatory EFT payers on 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 not suppressed on Organizer States Common State Print Suppression, State Forms column, Texas checkbox + Parent name exists OR Affiliates detail exists + Combined report checked on Organizer State Franchise Tax Texas Franchise General Information General Information Combined Report + Tax rate exists on 05-158B + Accounting year end date exists on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared

Form 05-167	Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + All severe diagnostics have been cleared + Not suppressed on Organizer State Franchise Tax Texas Franchise Return Options Print Suppression + "No" checked on Organizer State Franchise Tax Texas Franchise General Information General Information "Corporation, LLC, professional association..." + Final Return not checked on Organizer States Common State General Information Basic Return Information Return Information tab Final Return + "This entity does not have NEXUS in Texas" not checked on Organizer State Franchise Tax Texas Franchise General Information General Information + Taxpayer number required + Report year required + Diagnostics cleared
Form 05-169	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 on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared
Form 05-170	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 on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared One of the following has to be Yes: (Data exists on 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 on Organizer State Franchise Tax Texas Franchise Return Options Force Print
Form 05-175	Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Partnership detail entered on Organizer State Franchise Tax Texas Franchise Tiered Partnership + Tired partnership election checked on 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 on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared
Form 05-177	Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Combined return + Diagnostics have been cleared + Taxpayer name exists on Tax Forms States Texas 05-177, Common Owner Report + Tax rate exists on 05-158B + Accounting year end date exists on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared
Form 05-178	Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Data exists on 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 on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared

Form 05-180	Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Amount of historic structure credit claimed exists on 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 + Tax rate exists on 05-158B + Accounting year end date exists on Organizer State Franchise Tax Texas Franchise General Information General Information + Diagnostics cleared
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Form 25-103	Texas is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Texas" checkbox + Amount exists on Tax Forms States Texas 25-103, Insurance Total premiums allocated to Texas from all supplements
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TXCommonData

Utah

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

Form/Schedule

Requirement(s) to Print

Form TC-20	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
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Form TC-20, Supplemental Information	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
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Form TC-20A	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
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Form TC-20B	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
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Form TC-20C	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
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Form TC-20D/E	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
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Form TC-20H	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + One of the following has to be Yes: (Amount exists on Line 3 of Tax Forms States Utah TC-20, Tax Return Schedule H, Pg 1 tab OR Amount exists on Line 5 of Tax Forms States Utah TC-20, Tax Return Schedule H, Pg 1 tab OR Amount exists on Line 6 of Tax Forms States Utah TC-20, Tax Return Schedule H, Pg 1 tab OR Amount exists on Line 17 of Tax Forms States Utah TC-20, Tax Return Schedule H, Pg 2 tab OR Amount exists on Line 19 of Tax Forms States Utah TC-20, Tax Return Schedule H, Pg 2 tab OR Amount exists on Line 20 of Tax Forms States Utah TC-20, Tax Return Schedule H, Pg 2 tab)
Form TC-20J	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + One of the following has to be Yes: (Amount exists on Line 1f Col B of Tax Forms States Utah TC-20, Tax Return Schedule J, Pg 1 tab OR Amount exists on Line 3a Col B of Tax Forms States Utah TC-20, Tax Return Schedule J, Pg 1 tab OR Amount exists on Line 5h Col B of Tax Forms States Utah TC-20, Tax Return Schedule J, Pg 1 tab)
Form TC-20M	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Amount exists on Line b of ax Forms States Utah TC-20, Tax Return Schedule M, Pg 1 tab
Form TC-20R	
Form TC-20S (S Corp)	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
Form TC-20S M	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Name exists on Tax Forms States Utah TC-20S, Tax Return Schedule M, Pg 1 tab Detail hyperlink
Form TC-20S N	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Amount exists on Ln 2a "Nonresident Individuals" of Tax Forms States Utah TC-20S, Tax Return Page 1
Form TC-20S, Sch. H	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Ln 2b "Nonresident Individuals" is not 100% on Tax Forms States Utah TC-20S, Tax Return Page 1 + One of the following has to be Yes: (Amount exists on Line 14 of Tax Forms States Utah TC-20S, Tax Return Schedule H, Pg 1 tab OR Amount exists on Line 28 of Tax Forms States Utah TC-20S, Tax Return Schedule H, Pg 2 tab)

Form TC-20S, Sch. J	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If C Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + One of the following has to be Yes: (Amount exists on Line 1f Col B of Tax Forms States Utah TC-20S, Tax Return Schedule J, Pg 1 tab OR Amount exists on Line 3a Col B of Tax Forms States Utah TC-20S, Tax Return Schedule J, Pg 1 tab OR Amount exists on Line 5h Col B of Tax Forms States Utah TC-20S, Tax Return Schedule J, Pg 1 tab)
Form TC-20S, Supplemental Information	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type
Form TC-20SA	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Ln 2b "Nonresident Individuals" is not 100% on Tax Forms States Utah TC-20S, Tax Return Page 1
Form TC-20SE	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Ln 2b "Nonresident Individuals" is not 100% on Tax Forms States Utah TC-20S, Tax Return Page 1
Form TC-250	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + One of the following has to be Yes: (Amount exists for Non-refundable Credits at Organizer States Utah Credits Pass-Through Credits OR Amount exists for Refundable Credits at Organizer States Utah Credits Pass-Through Credits OR Amount exists for Mineral Production Credit at Organizer States Utah Credits Pass-Through Credits)
Form TC-559	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Utah is not suppressed on Organizer States Common State Print Options Print Suppression Suppression SC-Cities tab
Schedule K	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Utah is not suppressed on K-1 Equiv checkbox at Organizer States Common State Print Options Print Suppression Suppression SC-Cities tab
Schedule K-1	Utah is not suppressed on Organizer States Common State Print Suppression, "State Forms" column, "Utah" checkbox + If S Corp under Organizer General Information Basic Return Information Entity Information Return/Entity Type Return Type + Utah is not suppressed on K-1 Equiv checkbox at Organizer States Common State Print Options Print Suppression Suppression SC-Cities tab
SchK1Partner	

WksTC20-
IntangiblePropElection

Vermont

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

Form/Schedule	Requirement(s) to Print
Form BA-402	Prints with Form CO-411 or BI-471 + For unitary combined return: prints for subs having nexus in Vermont
Form BA-403	Vermont State Forms are NOT suppressed on Organizer States Common State Print Suppression + Amount due on Form BA403 + Return is on extension is checked .
Form BA-404	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities + C-corporation or S-Corp + Amount on line 13
Form BA-406	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities + S-corporation + Amount on line 13
Form BI-470	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities + C-corporation + Tax amount is due
Form BI-471	Prints if Nonresident shareholder box is checked as NO OR Reporting entity with income or losses from Vermont is checked as NO OR Depreciation adjustment
Form BI-472	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities + S-corporation + If Composite Return is checked as NO + Shareholder or members nonresident of Vermont is checked as "YES
Form BI-473	Prints if Composite Return is checked as YES + Shareholder or members nonresident of Vermont is checked as ""NO
Form BI-476	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities + S-corporation + Nonresident shareholder of Vermont checked as No + Reporting entity with income or losses from Vermont is checked as NO + Depreciation adjustment has no value .
Form CO-411	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities + C-corporation
Form CO-414	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities + Estimated tax has amount due
Form CO-419	C-Corp + If line CO-419 line 17 is populated
Form CO-420	Suppress print not selected on Organizer States Common State Print Options Print Suppression Suppression SC-Cities + Unitary combined return + Dividend payer name is entered.
Form CO-421	For unitary combined return: prints for subs having nexus in Vermont
Form WH-435	If estimated payments are not suppressed in Common State + Amount exists on Form WH-435

FormBI477S

Schedule BA-410 Affiliation Schedule Suppress print not selected on Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities + Combined return + Entity should have nexus in Vermont

Schedule K-1 VT Suppress print not selected on Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities + S-corporation + Shareholder name + Percentage should be entered and not suppressed on the Return Information page

Virginia

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

Form/Schedule

Requirement(s) to Print

Form 301	Line 11 or 16, Credit used this year must be present on form
Form 305	Part II line 1 must exist on form
Form 306	Part II lines 1-3 must exist on form
Form 306, Schedule A	Name of purchasing firm must exist on form
Form 306, Schedule B	Column C must exist on form
Form 306, Schedule C	Column A must exist on form
Form 500	Must be a Federal C corporation and not financial
Form 500 NOLD	Line 2a on form exists
Form 500, Schedule A	Apportionment information must be entered in Organizer Allocation and Apportionment A&A Data Entry or A&A Organizer/Overrides + For single companies, must be multistate (apportionment less than 100%), for top consolidations, must not be a VA combined return.
Form 500AB	Name of related entities must be present on form
Form 500AC	Must be a top consolidation
Form 500ADJ	Form 500 page 2, line 2 or line 4 must be present or Schedule of VK-1 withholding, Sch 500A, page 2 must be present + Sch 500ADJ, Line 7 or line 10 must be present.
Form 500C	If line 17 is present and not suppressed.
Form 500CP/CG	Tax payment amount exists +Organizer States Virginia Return Options E-file waiver has been received from Department of Taxation checkbox is selected.
Form 500CR	Total nonrefundable Credits exists on Section 2 line 1B or Section 4 line 1A of the form
Form 500EL, Schedule C	Activate Form 500EL Organizer States Virginia Minimum Tax
Form 500ES	Payment amount exists on the tax form +Organizer States Virginia Return Options E-file waiver has been received from Department of Taxation checkbox is selected.
Form 500FED	Virginia is activated on spreadsheet + Federal return is a C corporation

Form 500HS

Form 500T Activate Form 500T Organizer | States | Virginia | Minimum Tax

Form 500V Payment amount exists on the tax form + Organizer | States | Virginia | Return Options | E-file waiver has been received from Department of Taxation checkbox is selected.

Form 502 (S Corp) Virginia is activated on spreadsheet + Federal return is a S corporation

Form 502 PTET Tax Forms | States | Virginia | Form 502PTET | Form 502PTET Page 1 | 'Check here to certify eligibility and election to pay Virginia income tax at the entity level...' | Drill-down on the checkbox here | 'Eligibility and election to pay tax at entity level' | Enable this checkbox for Form 502PTET to print.

Form 502, Schedule A (S Corp) Apportionment information must be entered in Organizer | Allocation and Apportionment | A&A Data Entry or | A&A Organizer/Overrides

Form 502ADJ Not suppressed

Form 502FED-1

Form 502V Payment amount exists on the tax form +Organizer | States | Virginia | Return Options | E-file waiver has been received from Department of Taxation checkbox is selected.

Form 502W Payment amount exists on the tax form + Organizer | States | Virginia | Return Options | E-file waiver has been received from Department of Taxation checkbox is selected.

Form 64, Page 1 Virginia is activated on spreadsheet + Federal return is a C corporation + Organizer | States and City Activation, select Financial return

Form 64, Schedules C, D, E, F, G, H Organizer | States and City Activation, select Financial return + Data present on forms.

Form 765 (S Corp) More than 1 shareholder elects to be included in composite; Organizer | States | Virginia | Shareholder Information | Composite Return Information

Form 770ES Payment amount exists on the tax form

Form 770-IP Payment amount exists on the tax form

Form VA 4562 Depreciation detail or overrides have been entered in Organizer | Allocation and Apportionment | A&A Data Entry or | A&A Organizer/Overrides + The schedules have not been suppressed

Form VA 8453-C VA e-file enabled on Organizer | States | State E-file | Enable/Create Returns | Signature Option | Attach

Form VA 8453-P (S Corp) VA e-file enabled on Organizer | States | State E-file | Enable/Create Returns | Signature Option | Attach

Form VA 8879-C VA e-file enabled on Organizer | States | State E-file | Enable/Create Returns | Signature Option | Retain

Form VA 8879-P (S Corp) VA e-file enabled on Organizer | States | State E-file | Enable/Create Returns | Signature Option | Retain

Form VK-1 Virginia is activated on spreadsheet +Federal return is a S corporation

Schedule 500ABTOP

Schedule 500ACOMB

Schedule 500AP

West Virginia

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

Form/Schedule

Requirement(s) to Print

Form CIT-120APT

Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Option to suppress is not selected Organizer | States | West Virginia | Return options - Schedule NOL entity level detail for consolidated returns

Form CIT-120ES

Suppress print not selected in Organizer | States| Common State| Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Valid estimate options selected in Organizer | States | Common State | Tax Estimate Options | Estimated Tax Options + Organizer | States | West Virginia | Overpayment and Estimate Options | Estimated Tax | Compute and Print Options | Suppress print if no payments are due after applying overpayment is not marked

Form CIT-120T

Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia tab | Ext is not selected for West Virginia + Selected the West Virginia "On Extension" under Organizer | States | Common State | Estimates and Extensions and on the first tab "Extension + Amount exists on line 1 "Tentative West Virginia Corporate Net Income Tax "

Form CIT-120TC

Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Amount exists on CNF-120TC, Page 2, either column 1 or 2 total credits.

Form CIT-120U

Suppress print not selected in Organizer | States| Common State| Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities -| Und of Est Tax is not selected for West Virginia + Organizer | States | West Virginia | Underpayment Options | Option to Compute and Print Underpayment Penalty | Suppress penalty computation and do not print form is not selected + Amount on Part I income tax required to be paid or an amount on Part IV, penalty due

Form CNF-120

Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia

Form CNF-120W	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia + Must have name of taxpayer entered and a West Virginia withholding amount on the form.
Form NRW-2 (S Corp)	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia + Name of nonresident and income subject to withholding for nonresident and an address for both organization and nonresident.
Form PTE-100 (S Corp)	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia
Form PTE-100APT (S Corp)	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia
Form PTE-100T (S Corp)	Option to suppress is not selected Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia + Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia tab Ext is not selected for West Virginia + West Virginia "On Extension" selected under Organizer States Common State Estimates and Extensions and on the first tab "Extension + Amount exists on line 3 "Total tax due "
Form PTE-100TC (S Corp)	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia
Form PTE-100V (S Corp)	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia + Amount of payment due on the form.
Form PTE-100W (S Corp)	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" West Virginia + Must have name of taxpayer entered and a West Virginia withholding amount on the form.
Form WV-CITV	Suppress print not selected in Organizer States Common State Print Options Print Suppression Suppression SC-Cities - for the first column "State Forms" WV + amount of payment due on the form.
Form120	
FormWVNRW2	
K1Corp	
Sch1	
Sch2	
SchA100	
SchB1_100	
SchB1_120	

SchB100

SchB120

SchC

SchD

Schedule K Equivalent Suppress print not selected in Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Suppress print not selected in Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the last column "K-1 Equiv" West Virginia

Schedule K-1 Equivalent Suppress print not selected in Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the last column "K-1 Equiv" West Virginia + Not suppressed under Organizer | States | West Virginia | Shareholder Information | "Suppress the print of Schedule K-1 Equivalent

Schedule NOL Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Must have the form populated with a year of loss

Schedule SP (S Corp) Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Shareholder name is on the form

Schedule UB 1 Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Must have combined West Virginia in state activation + Must be a sub consolidation or a TOPCON + Combined must be marked on page 1 of the return + Return has to be consolidated in order for the parent and subsidiaries information to flow to the consolidated return

Schedule UB 2 Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Must have combined West Virginia in state activation + Must be a sub consolidation or a TOPCON + Combined must be marked on page 1 of the return + Return has to be consolidated in order for the parent and subsidiaries information to flow to the consolidated return

Schedule UB 3 Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Must have combined West Virginia in state activation + Must be a sub consolidation or a TOPCON + Combined must be marked on page 1 of the return + Return must be consolidated in order for the parent and subsidiaries information to flow to the consolidated return

Schedule UB 4-APT Option to suppress is not selected Organizer | States | Common State | Print Options | Print Suppression | Suppression SC-Cities - for the first column "State Forms" West Virginia + Must have combined West Virginia in state activation + Must be a sub consolidation or a TOPCON + Combined must be marked on page 1 of the return + Return must be consolidated in order for the parent and subsidiaries information to flow to the consolidated return

SchUB120

SchUBCR

WVK1

Wisconsin

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

Form/Schedule	Requirement(s) to Print
Form 1CNS	S Corp + Amount on line 1
Form 4	C Corp + Single
Form 4466W	Organizer States Wisconsin Overpayment and Estimate Options Overpayment
Form 4BL	C Corp + Single + Amount on line 30
Form 5K-1	S Corp
Form 5S (S Corp)	S Corp
Form 6	C-Corp + Top consolidation
Form 6BL	C Corp + Prints from top consolidation + At member level there must be a value on line 30
Form 6CL	C Corp + Prints from top consolidation + At member level there must be a value on line 7, 8 or 9e
Form 6CS	C Corp + Top consolidation + Amount on line 1, or 4 (combined column)
Form 6I	C Corp + Top consolidation + Amount on line 4, 13, 24 or 30 (combined column)
Form 6Y	C Corp +Top consolidation + Amount on line 4
Form A-1	Not 100% A&A + Organizer States Wisconsin Allocation and Apportionment A-1 type of industry chosen
Form A-2	Not 100% A&A + Organizer States Wisconsin Allocation and Apportionment A-2 type of industry chosen
Form C	C Corp and Single + Separate Accounting marked
Form Corp-ES	
Form N	Single + Amount on line 8
Form PW-1	Check box to include all non-resident shareholders + Organizer States Wisconsin Nonresident Withholding Nonresident Withholding
Form U	Amount on line 17 or 26
FormPWU	
Sch4Y	
Sch5SET, SchETOS	
SchA01 to SchA11	
Schedule 4I	C Corp + Single company + Organizer States Wisconsin Allocation and Apportionment Insurance type of industry chosen

Schedule 4V	C Corp + Single company + Amount on line 11
Schedule 4W	C Corp + Single company + Amount on line 15
Schedule 4Y	C Corp + Single + Amount on line 4
Schedule 5-K1	S-Corp
Schedule AR	
Schedule BD	Amount on line 3
Schedule CF	Credit Carryforward present
Schedule CM	Amount on line 5
Schedule CR	C Corp + Single + Amount on line 44 or 47
Schedule CU-1	C Corp
Schedule DC	Amount on line 9 or 17
Schedule DE	Name of LLC entered
Schedule EC	Amount on line 3
Schedule ED	Amount on line 8
Schedule EIT	
Schedule ES	
Schedule FC	Amount on line 18
Schedule HR	Amount on line 10
Schedule JT	Amount on line 5
Schedule LI	
Schedule MA-A	Amount on line 22
Schedule MA-M	Amount on line 8
Schedule MI	Amount on line 6
Schedule MS	Amount on line 3
Schedule R	Amount on line 18
Schedule RT	Amount on line 5 or 7
Schedule RT-1	Amount on line 5
Schedule TC	Amount on line 8
Schedule VC	Amount on line 15
SchFCA	