INCOME AT A GLANCE

FORM	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	REPORTS ON
W-2 Wage Income	Select **Add Form**	Double-click **FRM W-2**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the W-2	Add any additional states the taxpayer worked in	1040 Line 1
W-2G Gambling Income	Select **Add Form**	a. Search W2-G b. Double-click **FRM W2-G**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	a. Complete the W-2G b. Enter SSN for First ID c. Enter Driver's License for Second ID	If the gambling income needs reported to another state add that state return	SCH 1 Line 8b
1099-G Unemployment Income	Select **Add Form**	a. Search 1099-G b. Double-click **FRM 1099-G**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the 1099-G		SCH 1 Line 7
SSA-1099 Social Security Income	Select **Add Form**	a. Search SSA-1099 b. Double-click **FRM SSA-1099**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the SSA-1099	Link Medicare Premiums to SCH A	1040 Line 6
1099-R Retirement Income	Select **Add Form**	a. Search 1099-R b. Double-click **FRM 1099-R**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the 1099-R	Enter any state adjustment codes	1040 Line 5
1099-NEC Nonemployee Compensation	Select **Add Form**	a. Search 1099-NEC b. Double-click **FRM 1099-NEC**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	a. Complete the 1099-NEC b. Link to SCH C	Complete the Due Diligence Worksheet and SCH C	SCH C Line 1 SCH F Line 8 SCH F Line 43 FRM 8919
1099-K Payment Card and Third-Party Network Transactions	Select **Add Form**	a. Search 1099-K b. Double-click **FRM 1099-K**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	a. Complete the 1099-K b. Link to SCH C, E, F, or Other Income	Complete the appropriate Due Diligence Worksheet and Schedule	SCH C Line 1 SCH E Line 3 SCH F Line 8 SCH F Line 43 SCH 1 Line 8z

INCOME AT A GLANCE

FORM	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	REPORTS ON
1099-MISC Miscellaneous Income	Select **Add Form**	a. Search 1099-MISC b. Double-click **FRM 1099-MISC**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	a. Complete the 1099-MISC b. Link to SCH C, E, F, or Other Income	Complete the appropriate Due Diligence Worksheet and Schedule	SCH C Line 1 SCH E Line 3 SCH F Line 8 SCH F Line 43 SCH 1 Line 8z
1099-INT Interest Income	Select **Add Form**	a. Search 1099-INT b. Double-click **FRM 1099-INT**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the 1099-INT		SCH B
1099-DIV Dividends and Distributions	Select **Add Form**	a. Search 1099-DIV b. Double-click **FRM 1099-DIV**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the 1099-DIV		SCH B
1099-C Cancellation of Debt	Print a blank copy of the **Insolvency Worksheet** from the Tax Support Center	Have the customer complete the Insolvency Worksheet	a. Add Form 1099-C and link to other income **OR** b. Complete Form 982 for the amount insolvent			Form 982 or SCH 1 Line 8C
K-1 (1041) Beneficiary's Share of Income, Deductions, Credits	Select **Add Form**	a. Search K-1 (1041) b. Double-click **K-1 (1041)**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the K-1 (1041)		Most commonly reported on SCH E
K-1 (1065) Partner's Share of Income, Deductions, Credits	Select **Add Form**	a. Search K-1 (1065) b. Double-click **K-1 (1065)**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the K-1 (1065)		Most commonly reported on SCH E
K-1 (1120S) Shareholder's Share of Income, Deductions, Credits	Select **Add Form**	a. Search K-1 (1120S) b. Double-click **K-1 (1120S)**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the K-1 (1120S)		Most commonly reported on SCH E

INCOME AT A GLANCE

Income Type	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
Self-Employment Income NOT reported on a tax form	Select **Add Form**	a. Search C b. Double-click **SCH C**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	a. Enter the principal business activity b. Enter the business code c. Complete numbers C-E as needed d. Select the accounting method on line F e. Enter the appropriate QBID code	Enter the taxpayer's income NOT reported on a tax form on Line 1	Enter the taxpayer's expenses
Farm Income NOT reported on a tax form	Select **Add Form**	a. Scroll down and locate SCH F b. Double-click **SCH F**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	a. Enter the principal crop or activity b. Enter the AG code c. Select the accounting method on line c d. Enter the appropriate QBID code	Enter the taxpayer's income NOT reported on a tax form in the correct line number for Part I (Cash) or Part III (Accrual)	Enter the taxpayer's expenses
Rental Income NOT reported on a tax form	Select **Add Form**	a. Search E b. Double-click **SCH E PG 1**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	a. Enter the property address in line 1A b. Enter the property type c. Enter days rented d. Enter days used for personal use e. Enter the appropriate QBID code	Enter the taxpayer's income NOT reported on a tax form on Line 3a	Enter the taxpayer's expenses

CREDITS & DEDUCTIONS

FORM	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	REPORTS ON
1098-T Tuition Statement	Determine who should be reporting the 1098-T on their return (see note below)	Select **Add Form**	a. Search 1098-T b. Double-click **FRM 1098-T**	Complete the 1098-T	Complete 8863 Part III	8863 Part III
1098 Mortgage Interest Statement	Select **Add Form**	a. Search 1098 b. Double-click **FRM 1098**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the 1098		SCH A Line 8
1098-E Student Loan Interest	Select **Add Form**	a. Search 1098-E b. Double-click **FRM 1098E**	If MFJ choose **Taxpayer Occurrence** or **Spouse Occurrence**	Complete the 1098-E		SCH 1 Line 21
Form 2441 Child and Dependent Care Expenses	a. Place an "X" in the dependent care field box on the Client Data Page b. Select **Add Form**	a. Search 2441 b. Double-click **FRM 2441**	Complete Part I **a.** Enter the care provider's name and phone number **b.** Enter the care provider's address **c.** Enter the care provider's SSN or EIN **d.** Enter "H" if a household employee **e.** Enter the total amount paid to the care provider	Complete Part II **a.** Enter the amount paid for each dependent next to their information		SCH 3 Line 2

[1]If a student is claimed as a dependent, then all expenses are treated as being paid by the person claiming them. Form 1098-T should be claimed by the guardian if the payments in box 1 plus any allowable education expenses are greater than the scholarships in box 5. If the scholarships in box 5 are more, the 1098-T should be claimed on the student's return if they file.

5498-SA
HSA, Archer MSA, or Medicare Advantage MSA Information

Are the contributions reported on Form W-2 Box 12 with code "W"? Skip to step 2

1. Add Form 8889
2. Navigate to Form 8889
3. Select “Self Only” or “Family” on line 1a
4. Enter the month coverage began on line 1b
5. Navigate to Line 9 and ensure employer contributions have transferred from Form W-2

Or

IF the contributions were not on Form W-2, enter HSA contributions made by the taxpayer or spouse on Line 2

1099-SA
Distributions From an HSA, Archer MSA, or Medicare Advantage MSA

Did the taxpayer have Form 5498-SA and you have already completed steps 1-4 listed above? Skip to step 5

1. Add Form 8889
2. Navigate to Form 8889
3. Select “Self Only” or “Family” on line 1a
4. Enter the month coverage began on line 1b
5. Enter the amount of the distribution from 1099-SA on line 14
6. Enter any amount of the distribution the taxpayer used for medical expenses on line 15 (this is not on the form; you will have to ask the taxpayer)

1095-A
Health Insurance Marketplace

1. Place an “X” in the “Marketplace” Health Insurance Box on the Client Data Page
2. Navigate to the ACA Prem TC Worksheet
3. Indicate who the policy is for in Part 1, line 1
4. In Part 2, enter the policy number
5. Complete Part 2, Line 3 by entering the amounts in columns A, B, and C
6. If multiple policies, select the multiple policies worksheet and repeat steps 4 and 5 until all 1095-A information has been entered
7. Complete Part 3 if there are dependent(s) on the return that are filing their own return
8. Complete Part 4 if the taxpayer is sharing the Marketplace policy with another tax family
9. Complete Part 5 if the taxpayers got married in the tax year and they meet the criteria for the Alternative Marriage Calculation (listed in Part 5 of the ACA Questionnaire)