# 2021 Fiesta Tax Software Map

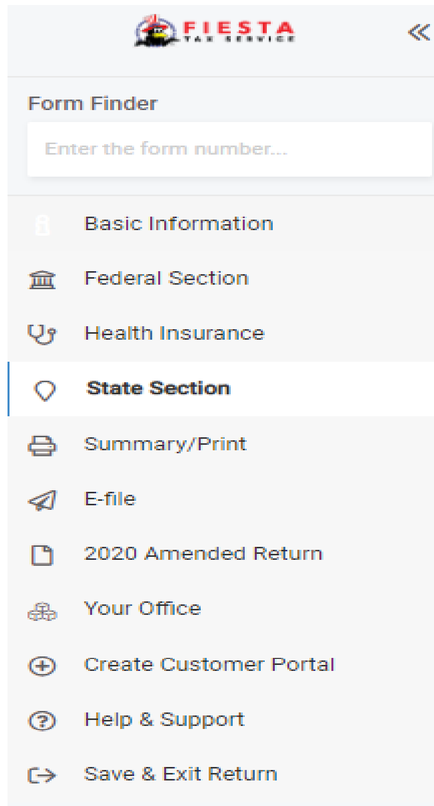
The purpose of this tool is to assist tax preparers and reviewers locate most tax return items in Tax Software.

The objective is to become familiar with the lay out the menu structures of each section of a return so that a preparer can understand how the software is organized.



When a preparer starts or opens a tax return in the software, this is the menu shown along the left side of the screen.

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- E-File
- 2020Amended Return
- Save & Exit Return
- Your Office
- Create Customer Portal




This tool provides a detailed outline of the **first three menu items**. In some cases, the preparer must enter some basic information on a topic before the rest of that menu structure becomes available. For instance, the preparer must start at least one Schedule C before the "Profit or Loss Form A Business (Schedule C)" items will display.

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## Basic Information Menu Structure

**Filing Status**

**Personal Information**

**Dependents / Qualifying Person**

## Federal Section Menu Structure

**Income**

- Wages and Salaries (W-2)
- State and Local Refunds (1099-G Box 2)
- Interest and Dividends (1099-INT, 1099-DIV)
  - Interest or Dividend Income
    - Interest Income, Form 1099-INT
    - Tax Exempt Interest Income, Form 1099-INT, Box 8 or Form 1099-DIV, Box 10
    - Dividend Income, Form 1099-DIV, Box 1
    - Seller Financed Interest Income
  - Did you earn interest from a bank in a foreign country?
  - Exclusion of Interest from Series EE & I US Savings Bonds
- IRA/Pension Distributions (1099-R, 1099-SSA)
  - Add or Edit a 1099-R
  - RRB-1099-R
  - Social Security Benefits/RRB-1099
  - Nontaxable Distributions
    - Mark this as a Qualified Charitable Distribution (QCD) on your return.
    - Qualified health savings account (HSA) funding distribution (HFD) on your return.
    - Retired public safety officer; part of distribution used to pay insurance premiums.
- Unemployment Compensation (1099-G Box 1)
  - Add or Edit a 1099-G
  - Repayment of Unemployment
- Form 1099-Misc
- Profit or Loss from A Business (Schedule C)
  - Basic Information About Your Business
  - Questions About the Operation of Your Business
  - Income
  - Cost of Goods Sold
  - General Expenses
  - Car and Truck Expenses
  - Depreciation
  - Other Expenses
  - Expenses for Business Use of Your Home
  - Restart Schedule C Guide

# 2021 Fiesta Tax Software



Rents and Royalties (Schedule E)

- Rent and Royalty Basic Information
- Depreciation
- Expenses
- Car and Truck Expenses

Capital Gain and Losses (Schedule D)

- Capital Gains and Loss Items
- Additional Capital Gains Distributions
- Other Capital Gains Data
- Sale of Main Home Worksheet

Profit or Loss from Farming (Schedule F)

Alimony Received Other Income

- Other Inc. Not Reported Elsewhere
- Gambling Winnings (W-2G)
- Other Compensation
  - Scholarships and Grants
  - Fringe Benefits
  - Household Employee Income
  - Prisoner Earned Income
  - Foreign Earned Compensation
- Payments from Qualified Education Programs (Form 1099-Q)
- Cancellation of Debt (1099-C, Form 982)
  - Cancellation of Debt (Form 1099-C)
  - Exclusions (Form 982)
- Installment Sale Income (Form 6252) Sale of Business Property (Form 4797) K-1 Earnings
  - Schedule K-1 (Form 1065)
  - Schedule K-1 (1120S)
  - Schedule K-1 (1041)
  - Schedule E (Page 2) Question
- Gains and Losses from Section 1256 (Form 6781)
- Foreign Earned Income Exclusion (Form 2555)

**Deductions**

Adjustments

- Medical Savings Account (Form 8853)
- Educator Expenses
- Expenses for Reservists, Performing Artists, and Qualifying Government Employees
- Health Savings Account (Form 8889)
- Moving Expenses (Form 3903)
- Contributions to SEP, Simple, and Qualified Plans
- Self-Employed Health Insurance
- Penalty on Early Withdrawal of Savings or CD
- IRA Deduction
- Nondeductible IRAs (Form 8606)
- Student Loan Interest Deduction
- Tuition and Fees Deduction
- Domestic Production (Form 8903)
- Other Adjustments {Dropdown menu with seven items, including Jury Duty Pay}

# 2021 Fiesta Tax Software



Standard Deduction
Itemized Deductions

Use Standard or Itemized Deduction
Medical and Dental Expenses
Taxes You Paid

- Additional State and Local Income Tax
- State and Local Sales Tax Paid
- Sales Tax Worksheet
- Prior Year 4th Quarter State Estimates paid after 12/31/2014
- Real Estate Taxes (Non-Business Property)
- Personal Property (ex: Car Registration)
- Other Taxes

Mortgage Interest and Expenses

- Mortgage Interest Reported on Form 1098
- Mortgage Interest Not Reported on Form 1098
- Points Not Reported on Form 1098
- Primary Mortgage Insurance (PMI) Deduction

Gifts to Charity

- Cash Gifts to Charity
- Non-Cash Gifts to Charity
- Non-Cash Donations (more than $500)
- Limitation on Charitable Contributions Deduction
- Declaration of Appraiser
- Donee Acknowledgement
- Unreimbursed Employee Business

Expense

- Union or Professional Dues
- Job Search Expenses
- Uniforms
- Small Tools Used in Work
- Job Supplies
- Add/Edit Expenses that are not listed above:

Job-Related Travel Expenses (Form 2106)
Miscellaneous Deductions

- Amortizable premium on taxable bonds
- Gambling losses to the extent of gambling winnings
- Impairment-related work expenses
- Tax Return Preparation
- Safe Deposit Box Rental
- Investment Fees and Expenses
- Add/Edit Miscellaneous deductions not listed above

Less Common Deductions

- Casualties and Losses
- Business Use of Home
- Investment Interest

Credits Menu

Foreign Tax Credit (Form 1116)
Child Care Credit (Form 2441)
Education Credits (Form 1098-T)
Retirement Savings Credit (Form 8880)
Residential Energy Credit (Form 5695)
Adoption Credit (Form 8839)
DC First-Time Homebuyer Credit (Form 8859)
Mortgage Interest Credit (Form 8396)
Earned Income Credit (Form 8862)

- Information to Claim EIC After Disallowance
- EIC Information for Clergy
- Not Eligible for EIC

Credit for the Elderly or Disabled (Schedule R)
Alternative Motor Vehicle Credit (Hybrid Cars, Form 8910)
Qualified Electric Motor Vehicle Credit (Form 8936)
Small Employer Health Insurance Premiums (Form 8936)
Credit for Federal Tax Paid on Fuels (Form 4136)

**Other Taxes**

Self-employment Tax (Schedule SE)
Alternative Minimum Tax (Form 6251)
Tax on Unreported Tip Income (Form 4137)
Tax on Early Distribution (Form 5329)
Household Employment Tax (Schedule H)
First-Time Homebuyer Repayment (Form 5405)
Tax for Children Under Age 18 (Form 8615)
Child's Interest/Dividend Earnings (Form 8814)
Net Investment Income Tax (Form 8960)

**Payments and Estimates**

Federal Estimated Payments for 2015
State Estimated Payments
Other Federal Withholding
Other State Withholdings
Underpayment of Estimated Tax
Apply Overpayment to Next Year's Taxes
Vouchers for Next Year's Estimated Payments
Amount Paid with Extension

**Miscellaneous Forms**

Injured Spouse Form (Form 8379)
Claim a Refund Due to a Deceased Taxpayer (Form 1310)
Application for Extension (Form 4868)
Married Filing Separately Allocations (Form 8958)
IRS Identification Pin
Installment Agreement (Form 9465)
Application for ITIN (Form W-7)

# 2021 Fiesta Tax Software

## Health Insurance

The Health Insurance section does not have any menus or sub-menus. Preparers must move through the questionnaire in linear fashion and cannot jump to a specific part of the questionnaire.

## State Section



The state section is where a preparer can add one or more state returns. Because every state return is different, state menu structures equivalent to the federal menu structures above have not been provided here.

## Summary/Print

The Summary/Print section is where the preparer can access the 1040 “Summary View” and link to various entry points. This is also where the preparer can create a PDF for viewing or printing.

## E-File

The E-File section is where the preparer indicates if the taxpayer wants to file electronically or mail the return, whether to use direct deposit/debit, and, if applicable, the bank account information for electronic funds transfers for refund or payment to IRS.

## Customer Portal

Customer Portal allows you and your customers to share documents back and forth quickly and securely.