



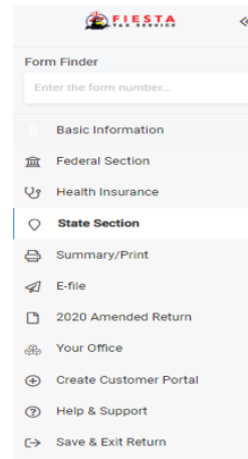
Software Menu Guide

The purpose of this menu guide is to assist tax preparers and reviewers with locating 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 and to assist a preparer with a better understanding of the process of each menu tab and what form the preparer will either be presented or must discuss with their client.

Software Menu

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



MENU GUIDE

<p>BASIC INFORMATION</p> <ul style="list-style-type: none"> Filing Status Personal Information Dependents / Qualifying Person <p style="text-align: center;">FEDERAL SECTION</p> <p>Income</p> <ul style="list-style-type: none"> W-2 Form 1099-G Box 2 Form 1099 INT, DIV, OID 1099-R RRB-1099, RRB-1099-R, SSA-1099 Form 1099-G Box 1 Form 1099-Misc Form 1099 NEC Profit or Loss from Business Form 1099-K Supplemental Income and Loss Capital Gains and Losses Profit or Loss from Farming 	<p>Deductions</p> <p><u>Adjustments</u></p> <ul style="list-style-type: none"> Standard Deduction Itemized Deductions Credits Menu Compare Deductions Cares Act 2020 <p><u>Other Taxes</u></p> <ul style="list-style-type: none"> Self-Employment Tax Alternative Minimum Tax Tax on Unreported Tip Income Repayment of First-Time Homebuyer Credit Child's Interest/Dividend Earnings <p><u>Payments and Estimates</u></p> <ul style="list-style-type: none"> Federal Estimated Tax Payments Other Federal Withholdings Underpayment of Estimated Tax Vouchers for 2022 Estimated Tax Payments Amount Paid with Extension <p><u>Miscellaneous Forms</u></p> <ul style="list-style-type: none"> Injured Spouse Form Claim Refund Due to a Deceased Taxpayer Application for Extension IRS Identification Pin Application for ITIN 	<p>HEALTH INSURANCE</p> <p>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.</p> <p>STATE SECTION</p> <p>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.</p> <p>SUMMARY/PRINT</p> <p>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.</p> <p>E-FILE</p> <p>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.</p> <p>2021 AMENDED RETURN</p> <p>CREATE CUSTOMER PORTAL</p>
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FEDERAL SECTION

• Income

Form W-2?

<p>Go to:</p> <ul style="list-style-type: none"> Federal Section Income Select my Forms W-2
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Form 1099-NEC?

<p>Go to:</p> <ul style="list-style-type: none"> Federal Section Income 1099-NEC <ul style="list-style-type: none"> Nonemployee Compensation
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Form 1099-MISC?

<p>Go to:</p> <ul style="list-style-type: none"> Federal Section Income 1099 MISC <ul style="list-style-type: none"> Miscellaneous Income

Schedule C?

<p>Go to:</p> <ul style="list-style-type: none"> Federal Section Income Profit or Loss from a Business
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Form 1099-K?

<p>Go to:</p> <ul style="list-style-type: none"> Federal Section Income Form 1099-K <ul style="list-style-type: none"> Payment card and third party

Unemployment Compensation?

<p>Go to:</p> <ul style="list-style-type: none"> Federal Section Income 1099-G Box 1 <ul style="list-style-type: none"> Unemployment Compensation

• Deductions

Form 7202?

Go to:

- Federal Section
- Deductions
- Credits Menu
- Credits for Sick Leave and Family Leave for Certain Self-Employed

Adjustments?

Go to:

- Federal Section
- Deductions
- Adjustments
 - Educator expenses, medical savings, student loan interest

Itemized Deductions?

Go to:

- Federal Section
- Deductions
- Itemized Deductions
 - Charitable contributions, mortgage interest, property taxes

Credits?

Go to:

- Federal Section
- Deductions
- Credit Menu
 - Child and dependent care credit, education, mortgage interest

Self-Employed Tax?

Go to:

- Federal Section
- Other Taxes
- Self Employment Tax
 - Reported on Schedule SE

Unreported Tips?

Go to:

- Federal Section
- Other Taxes
- Tax on Unreported Tip Income
 - Reported on Form 4137

• Other Taxes

Child Interest?

Go to:

- Federal Section
- Other Taxes
- Childs Interest/Dividend Earning
 - Reported on Form 8814

Alternative Minimum Tax?

Go to:

- Federal Section
- Other Taxes
- Alternative Minimum Tax
 - Reported on Form 6251

Tax on Early Distribution?

Go to:

- Federal Section
- Other Taxes
- Tax on Early Distribution
 - Reported on Form 5329

Household Employment Tax?

Go to:

- Federal Section
- Other Taxes
- Household Employment Tax
 - Schedule H

Repayment of First-Time Homebuyer?

Go to:

- Federal Section
- Other Taxes
- Repayment of First-time Homebuyer Credit
 - Reported on Form 5405

Uncollected Social Security & Medicare

Go to:

- Federal Section
- Other Taxes
- Uncollected Social Security and Medicare Tax
 - Reported on Form 891

• Payments and Estimates

Federal Estimated Tax Payments?

Go to:

- Federal Section
- Payments and Estimates
- Federal Estimated Tax Payments
 - Federal tax payments already made for 2021

State Estimate Payments?

Go to:

- Federal Section
- Payments and Estimates
- State Estimated Tax Payments
 - State tax payments already made for 2021

Other Federal Withholdings?

Go to:

- Federal Section
- Payments and Estimates
- Other Federal Withholding
 - Federal withholding you haven't entered

Other State Withholdings?

Go to:

- Federal Section
- Payments and Estimates
- Other State Withholdings
 - State withholding you haven't entered

Repayment of First-Time Homebuyer?

Go to:

- Federal Section
- Other Taxes
- Repayment of First-time Homebuyer Credit
 - Reported on Form 5405

Uncollected Social Security & Medicare

Go to:

- Federal Section
- Other Taxes
- Uncollected Social Security and Medicare Tax
 - Reported on Form 891

• Miscellaneous Forms

Form 8379?

Go to:

- Federal Section
- Miscellaneous Forms
- Form 8379
 - Injured Spouse

Form 4868?

Go to:

- Federal Section
- Miscellaneous Forms
- Form 4868
 - Application for Extension

Form 8958?

Go to:

- Federal Section
- Miscellaneous Forms
- Form 8958
 - Married Filing Separately Allocations

IRS Identification Pin?

Go to:

- Federal Section
- Miscellaneous Forms
- IRS Identification Pin
 - PIN needed if you were issued a CP01A notice from the IRS

Installment Agreement Request?

Go to:

- Federal Section
- Miscellaneous Forms
- Installment Agreement Request
 - Requested on Form 9465

Form W-7

Go to:

- Federal Section
- Miscellaneous Forms
- Form W-7
 - Application for ITIN