

# 2023 Pre-Tax Season Testing

## About Pre-Tax Season Testing

ONESOURCE Trust Tax offers pre-tax season testing to help you prepare for the 2023 tax season. Pre-tax season testing opens with the 23.05 release, which will be available on November 16, 2023, and continues until the 24.00 release on December 27, 2023.

Throughout pre-tax season testing, ONESOURCE Trust Tax invites you to test the 2023 tax application, and to report issues as you find them. To report an issue, contact the ONESOURCE Trust Tax Support team through the normal channels.

A list of reported issues will be available on OTT Help throughout pre-tax season testing. The list will be updated weekly. Be sure to review this list before reporting an issue to determine if the issue was reported previously.

Do not report print alignment issues to the ONESOURCE Trust Tax Support team. A print alignment issue on a form or schedule during pre-tax season testing indicates that the form was received from the taxing authority and is currently being updated and tested by ONESOURCE Trust Tax.

## About Pre-Tax Season Testing

During pre-tax season testing:

You are required to process tax returns as projections by selecting Tax Return Projection or Tax Return Projection and Worksheet from the Request drop-down list on the Process page. Processing a tax return will generate Error 2998, which indicates that the tax return is not available. 2023 tax return processing will be available beginning with the 24.00 release.

Tax year 2023 e-filing, Form 2210, Form 3800, state underpayment penalty forms, Iowa, Rhode Island returns, extensions, bulk shipping, and mailing Service are unavailable.

## About 2023 Federal and State Forms

Pre-tax season testing occurs before many tax year 2023 federal and state forms are finalized by the taxing authorities. Consequently, many of the 2023 forms are based on government-draft forms or the 2022 versions of the forms with rolled dates. ONESOURCE Trust Tax makes the 2023 final version of a form available to you as soon as possible after a taxing authority releases it. The following tables indicate which 2023 forms are available for this testing period.

Even after development is complete for the final version of a form, most taxing authorities require ONESOURCE Trust Tax to submit and obtain approval to use the form. As a result, you cannot successfully file the form with the taxing authority until the form is approved for use. See the Forms Status document, which will be posted to OTT Help in early January 2024 and updated throughout the 2023 tax season, to determine whether the taxing authority has approved a form for use.

## Federal Trust Forms and Schedules

| Form                                                                            | Available for testing |
|---------------------------------------------------------------------------------|-----------------------|
| Form 1041, U.S. Income Tax Return for Estates and Trusts                        | Yes                   |
| Form 1041-A, U.S. Information Return Trust Accumulation of Charitable Amounts   | Yes                   |
| Form 1041-ES, Estimated Tax Payments                                            | Yes                   |
| Form 1041-QFT, U.S. Income Tax Return for Qualified Funeral Trusts              | Yes                   |
| Form 1041-T, Transmittal of Estimated Tax                                       | Yes                   |
| Form 1041-V, Payment Voucher                                                    | Yes                   |
| Form 1042-S, Foreign Person's U.S. Source Income Subject to Withholding         | Yes                   |
| Schedule C, (1040) Profit or Loss from Business                                 | Yes                   |
| Schedule D, Capital Gains and Losses                                            | Yes                   |
| Schedule E, (1040) Supplemental Income Schedule                                 | Yes                   |
| Schedule F, (1040) Farm Income and Expense                                      | Yes                   |
| Schedule I, Alternative Minimum Tax                                             | Yes                   |
| Schedule J, Trust Allocation of an Accumulation Distribution                    | Yes                   |
| Schedule K-1, Beneficiary's Share of Income, Deductions, Credits, Etc.          | Yes                   |
| Form 56, Notice Concerning Fiduciary Relationship                               | Yes                   |
| Form 706-GS(D-1), Notification of Distribution From a Generation-Skipping Trust | Yes                   |
| Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation      | Yes                   |
| Form 965-A, Individual Report of Net 965 Tax Liability                          | Yes                   |
| Form 1116, Computation of Foreign Tax Credit (Regular and Minimum Tax Basis)    | Yes                   |
| Form 2210, Underpayment of Estimated Tax                                        | Suppressed            |
| Form 2439, Notice to Shareholder of Undistributed Long-Term Capital Gains       | Yes                   |
| Form 3800, General Business Credit                                              | Suppressed            |

|                                                                                                                                    |     |
|------------------------------------------------------------------------------------------------------------------------------------|-----|
| Form 4562, Depreciation and Amortization                                                                                           | Yes |
| Form 4797, Sale of Business Property                                                                                               | Yes |
| Form 4835, Farm Rental Income and Expenses                                                                                         | Yes |
| Form 4952, Investment Interest Expense Deduction (Regular and Minimum Tax Basis)                                                   | Yes |
| Form 5227, Split Interest Trust Information Return                                                                                 | Yes |
| Form 5884, Work Opportunity Credit                                                                                                 | Yes |
| Form 6252, Installment Sale Income                                                                                                 | Yes |
| Form 6765, Credit for Increasing Research Activities                                                                               | Yes |
| Form 6781, Gains and Losses from Section 1256 Contracts and Straddles                                                              | Yes |
| Form 7004, Application for Automatic 6-Month Extension of Time to File Certain Business Income Tax, Information, and Other Returns | Yes |
| Form 8275, Disclosure Statement                                                                                                    | Yes |
| Form 8275-R, Regulation Disclosure Statement                                                                                       | Yes |
| Form 8582, Passive Activity Loss Limitation (Regular and Minimum Tax Basis)                                                        | Yes |
| Form 8621, Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund                              | Yes |
| Form 8801, Minimum Tax Credit                                                                                                      | Yes |
| Form 8882, Credit for Employer-Provided Child Care Facilities and Services                                                         | Yes |
| Form 8886, Reportable Transaction Disclosure Statement                                                                             | Yes |
| Form 8949, Sales and Other Dispositions of Capital Assets                                                                          | Yes |
| Form 8960, Net Investment Income Tax – Individuals, Estates, and Trusts                                                            | Yes |
| Form 8990, Limitation on Business Interest Expense under Section 163(j)                                                            | Yes |
| Form 8992, U.S. Shareholder Calculation on Global Intangible Low-Taxed Income (GILTI)                                              | Yes |
| Form 8995, Qualified Business Income Deduction Simplified Computation                                                              | Yes |
| Form 8995-A, Qualified Business Income Deduction                                                                                   | Yes |
| Form 8995-A, Schedule A, Specified Service Trades or Businesses                                                                    | Yes |
| Form 8995-A, Schedule C, Loss Netting and Carryforward                                                                             | Yes |

|                                                                                                      |            |
|------------------------------------------------------------------------------------------------------|------------|
| Form 8995-A, Schedule D, Special Rules for Patrons of Agricultural or Horticultural Cooperatives     | Yes        |
| Form 8997, Initial and Annual Statement of Qualified Opportunity Fund (QOF) Investments              | Yes        |
| Agency Tax Information Letter                                                                        | Yes        |
| Form 8879-F, IRS e-file Signature Authorization for Form 1041                                        | Suppressed |
| Form 461, Limitation on Business Losses                                                              | Yes        |
| Form 8855, Election to Treat a Qualified Revocable Trust as Part of an Estate                        | Yes        |
| Form 8868, Application for Extension of Time to File Exempt Organization Return                      | Yes        |
| Form 8879-TE, IRS e-file Signature Authorization for a Tax-Exempt Entity                             | Yes        |
| Form 7203, S Corporation Shareholder Stock and Debt Basis Limitations                                | Yes        |
| Form 8082, Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)               | Yes        |
| Form 1116, Schedule B, Foreign Tax Carryover Reconciliation Schedule (Regular and Minimum Tax Basis) | Yes        |



## State Trust Forms and Schedules

| Form                          | Available for testing |
|-------------------------------|-----------------------|
| <b>Alabama</b>                |                       |
| Form 41, Schedule K-1         | Yes                   |
| Form FDT-V                    | Yes                   |
| Form 41                       | Yes                   |
| Form 41, Schedule D           | Yes                   |
| Form 41, Schedule ESBT        | Yes                   |
| Schedule FC (Form 41)         | Yes                   |
| Form 41, Schedule G           | Yes                   |
| Form 41, Schedule K           | Yes                   |
| Schedule CP-B                 | Yes                   |
| Form KRCC-B                   | Yes                   |
| Form K-RCC                    | Yes                   |
| Form NOL-F85                  | Yes                   |
| Form NOL-F85A                 | Yes                   |
| <b>Arizona</b>                |                       |
| Form141AZ EXT                 | Yes                   |
| Form 141AZ                    | Yes                   |
| Form 141AZ, Schedule K-1 (NR) | Yes                   |
| Form 141AZ V                  | Yes                   |
| Form 141AZ, Schedule K-1      | Yes                   |
| <b>Arkansas</b>               |                       |
| Form AR1002-TC                | Yes                   |
| Form AR8454FE                 | Suppressed            |

|                      |            |
|----------------------|------------|
| Form AR4-FID         | Yes        |
| Form AR2210          | Yes        |
| Form AR1099PT        | Yes        |
| Form AR1002V         | Yes        |
| Form AR1002NR        | Yes        |
| Form AR1002F         | Yes        |
| Form AR1002          | Yes        |
| Form AR1002ES        | Yes        |
| Form AR1055-FE       | Yes        |
| <b>California</b>    |            |
| Form 8879-FID        | Suppressed |
| Form 541-QFT         | Yes        |
| Form 541-T           | Yes        |
| Form 3461            | Yes        |
| Form 3526            | Yes        |
| Form 3563            | Yes        |
| Form 3801            | Yes        |
| Form 3804-CR         | Yes        |
| Form 541-ES          | Yes        |
| Form 3805E           | Yes        |
| Schedule D-1         | Yes        |
| Form 5805            | Suppressed |
| Schedule S           | Yes        |
| Form 8455-FID        | Suppressed |
| Form 541-A           | Yes        |
| Form 541, Schedule P | Yes        |

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|------------------------|-----|
| Form 541, Schedule K-1 | Yes |
| Form 541, Schedule J   | Yes |
| Form 541, Schedule D   | Yes |
| Form 541               | Yes |
| Form 3843              | Yes |
| Form 541-B             | Yes |

### Colorado

|                |            |
|----------------|------------|
| Form DR 8454F  | Suppressed |
| Form DR 1778   | Yes        |
| Form DR 0900F  | Yes        |
| Form DR 0158-F | Yes        |
| Form 105       | Yes        |
| Form 104-BEP   | Yes        |

### Connecticut

|                            |            |
|----------------------------|------------|
| Form CT-PE                 | Yes        |
| Form CT-1041, Schedule K-1 | Yes        |
| Form CT-1041B              | Yes        |
| Form CT-1041C              | Yes        |
| Form CT-1041, Schedule I   | Yes        |
| Form CT-1041FA             | Yes        |
| Form CT-1041ES             | Yes        |
| Form CT-1041EXT            | Yes        |
| Form CT-1041ESBT           | Yes        |
| Form CT-1041               | Yes        |
| Form CT-2210               | Suppressed |

### Delaware

|                                       |            |
|---------------------------------------|------------|
| Form 400-V                            | Yes        |
| Form 400-EX                           | Yes        |
| Form 400-ES                           | Yes        |
| Form 400, Schedule K-1                | Yes        |
| Form 400                              | Yes        |
| <b>District of Columbia</b>           |            |
| Form D-41                             | Yes        |
| Form FR-127                           | Yes        |
| Form D-41P SUB                        | Yes        |
| <b>Georgia</b>                        |            |
| Form 500-ES                           | Yes        |
| Form 500-UET                          | Yes        |
| Form 501-X                            | Yes        |
| Form 525 TV Fiduciary Payment Voucher | Yes        |
| Form IT-560                           | Yes        |
| Form 8453-F                           | Suppressed |
| Form 501                              | Yes        |
| <b>Hawaii</b>                         |            |
| Form N-40, Schedule CR                | Yes        |
| Form N-210                            | Suppressed |
| Form N-201V                           | Yes        |
| Form N-40, Schedule K-1               | Yes        |
| Form N-40, Schedule J                 | Yes        |
| Form N-40, Schedule D                 | Yes        |
| Form N-40                             | Yes        |
| Form N-40, Schedule D-1               | Yes        |

## Idaho

|           |     |
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| Form 41ES | Yes |
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| Form 66 | Yes |
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| Form ID K-1 | Yes |
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## Illinois

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| Schedule 1299-B | Yes |
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| Schedule M | Yes |
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| Form IL-1041-X | Yes |
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| Schedule K-1-T(3) | Yes |
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|----------------|-----|
| Schedule K-1-T | Yes |
|----------------|-----|

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| Form IL-4562 | Yes |
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|--------------------------|-----|
| Form IL-1041, Schedule D | Yes |
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| Form IL-1041-X-V | Yes |
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| Form IL-1041, Schedule CR | Yes |
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| Form IL-1041-V | Yes |
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| Form IL-1041, Schedule NR | Yes |
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| Form IL-1041 | Yes |
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| AG-990-IL (for 5227s) | Yes |
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| Form IL-1041, Schedule F | Yes |
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## Indiana

|                    |     |
|--------------------|-----|
| Schedule Composite | Yes |
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| Form IT-41ES | Yes |
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| IT-41 Schedule K-1 | Yes |
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| Form IT-41, Schedule 1 | Yes |
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| Form IT-41 | Yes |
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| Form 8879-C | Suppressed |
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## Iowa

|                                                      |            |
|------------------------------------------------------|------------|
| Form IA 101 Nonconformity Adjustments                | Suppressed |
| Form IA 1041-V                                       | Suppressed |
| Form IA 163A, Interest Expense Carryover Adjustments | Suppressed |
| Form IA 102                                          | Suppressed |
| Form IA 130                                          | Suppressed |
| Form IA 163, IA Interest Expense Adjustments         | Suppressed |
| Charitable Trust Annual Report                       | Suppressed |
| Form IA-1041, Schedule K-1                           | Suppressed |
| Form IA 8453-F                                       | Suppressed |
| Form IA 1041                                         | Suppressed |

## Kansas

|         |     |
|---------|-----|
| Form 41 | Yes |
| K-41V   | Yes |
| K-18    | Yes |

## Kentucky

|                        |            |
|------------------------|------------|
| Form 741, Schedule D   | Yes        |
| Form 8879-F            | Suppressed |
| Form 741-V             | Yes        |
| Form 741, Schedule J   | Yes        |
| Form 741               | Yes        |
| Form 740-EXT           | Yes        |
| Form 740-ES            | Yes        |
| Form 741, Schedule K-1 | Yes        |

## Louisiana

|             |     |
|-------------|-----|
| Form R-541V | Yes |
|-------------|-----|

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|---------------------------------|-----|
| Form R-6466                     | Yes |
| Form IT-541                     | Yes |
| Form R-10606                    | Yes |
| <b>Maine</b>                    |     |
| Form 1041ME                     | Yes |
| Form 2210ME                     | Yes |
| Form 1041ES-ME                  | Yes |
| Form 1041ME-PV                  | Yes |
| Form 1041ME-EXT                 | Yes |
| Form 1041ME, Minimum Tax Credit | Yes |
| Form 1041ME, Schedule NR        | Yes |
| Form 1041ME, Schedule A         | Yes |
| <b>Maryland</b>                 |     |
| Form 504NR                      | Yes |
| Form 502TP                      | Yes |
| Form 504                        | Yes |
| Form 504UP                      | Yes |
| Form 504D                       | Yes |
| Form 504E                       | Yes |
| Form 504NBD                     | Yes |
| Schedule K-1                    | Yes |
| Form 504, Schedule A            | Yes |
| Form 500DM                      | Yes |
| Form 502CR                      | Yes |
| <b>Massachusetts</b>            |     |
| Schedule D                      | Yes |

|                          |            |
|--------------------------|------------|
| Form M-2210              | Suppressed |
| Form 2-PV                | Yes        |
| Form 2K-1                | Yes        |
| Form 2-ES                | Yes        |
| Form 2G                  | Yes        |
| Schedule 2K-1            | Yes        |
| Schedule TDS             | Yes        |
| Schedule OJC             | Yes        |
| Schedule IDD             | Yes        |
| Schedule E               | Yes        |
| Form M-2210              | Yes        |
| Schedule F               | Yes        |
| Schedule H               | Yes        |
| Form M-8736              | Suppressed |
| Form M-8453F             | Suppressed |
| Form 1-ES                | Yes        |
| Form 2                   | Yes        |
| Schedule B               | Yes        |
| Schedule B/R             | Yes        |
| <b>Michigan</b>          |            |
| Form MI-1041ES           | Yes        |
| Form MI-1041, Schedule W | Yes        |
| Form MI-2210             | Yes        |
| Form MI-4797             | Yes        |
| Form MI-1041-D           | Yes        |
| Form 8453FE              | Suppressed |

|                           |     |
|---------------------------|-----|
| Form MI-1041V             | Yes |
| Form MI-4                 | Yes |
| Form 5879                 | Yes |
| Form MI-1041, Schedule NR | Yes |
| Form MI-1041              | Yes |
| <b>Minnesota</b>          |     |
| Schedule M-KF             | Yes |
| Form TPD                  | Yes |
| Form PV-82                | Yes |
| Form PV-67                | Yes |
| Form PV-43                | Yes |
| Schedule M2SB             | Yes |
| Schedule M2NC             | Yes |
| Schedule M2MT             | Yes |
| Schedule M1RCR            | Yes |
| Schedule M2SBNC           | Yes |
| Schedule EST              | Yes |
| Form M-70                 | Yes |
| Form M-2X                 | Yes |
| Form M-2                  | Yes |
| Schedule M-KFNC           | Yes |
| Schedule M2NM             | Yes |
| Schedule M1CR             | Yes |
| <b>Mississippi</b>        |     |
| Schedule K-1              | Yes |
| MS-80-106                 | Yes |

|                           |            |
|---------------------------|------------|
| Schedule K                | Yes        |
| Form 81-110               | Yes        |
| <b>Missouri</b>           |            |
| Form MO-1041-V            | Yes        |
| Form MO-CR                | Yes        |
| Form MO-NRF               | Yes        |
| Form MO-5802              | Yes        |
| Form MO-60                | Yes        |
| Form MO-1041              | Yes        |
| <b>Montana</b>            |            |
| Form FID-3, Schedule K-1  | Yes        |
| Form EST-I                | Yes        |
| Form EXT-FID              | Suppressed |
| Form-FID                  | Yes        |
| Form FID-3                | Yes        |
| <b>Nebraska</b>           |            |
| Form 7004N                | Yes        |
| Form 1041N, Schedule K-1N | Yes        |
| Form 1041N ESBT Worksheet | Yes        |
| Form 1041N                | Yes        |
| Form PTC                  | Yes        |
| Form 12N                  | Yes        |
| <b>New Hampshire</b>      |            |
| Form DP-10                | Yes        |
| <b>New Jersey</b>         |            |
| Form NJ-1041V             | Yes        |

|                                |     |
|--------------------------------|-----|
| Form NJ-1041, Schedule E       | Yes |
| Form NJ-BUS-2                  | Yes |
| Form NJ-BUS-1                  | Yes |
| Form NJ-2210                   | Yes |
| Form NJ-630                    | Yes |
| Form NJ-1041                   | Yes |
| Form NJ-1040-O                 | Yes |
| Form NJ-1040ES                 | Yes |
| Form NJ-1041SB, Schedule NJK-1 | Yes |
| Form NJ-1041, Schedule NJK-1   | Yes |

### New Mexico

|                        |            |
|------------------------|------------|
| Form FID-EXT           | Suppressed |
| Form PTW-EXT           | Suppressed |
| Form RPD-41373         | Suppressed |
| Form RPD-41359         | Suppressed |
| Form PTW-PV            | Suppressed |
| Form FID-ES            | Suppressed |
| Form FID-D             | Suppressed |
| Form FID-B Schedule II | Suppressed |
| Form FID-B Schedule I  | Suppressed |
| Form FID-1             | Suppressed |
| Form RPD-41096         | Suppressed |

### New York

|               |     |
|---------------|-----|
| Form IT-225   | Yes |
| Form IT-205-J | Yes |
| Form IT-205-V | Yes |

|                            |            |
|----------------------------|------------|
| Form IT-653                | Yes        |
| Form TR-579.2-IT           | Suppressed |
| Form IT-2106               | Yes        |
| Form IT-399                | Yes        |
| Form IT-205-C              | Yes        |
| Form CHAR004               | Yes        |
| Form IT-205-A              | Yes        |
| Form DTF-686               | Yes        |
| Form IT-205                | Yes        |
| Form IT-182                | Yes        |
| Form DTF-686-ATT           | Yes        |
| Form IT-205-T              | Yes        |
| Form IT-2105.9             | Yes        |
| Form IT-112-R              | Yes        |
| <b>North Carolina</b>      |            |
| Form D-407                 | Yes        |
| NC K-1 Supplement Schedule | Yes        |
| Form NC K-1 (D-407)        | Yes        |
| Form D-410P                | Yes        |
| Form D-407TC               | Yes        |
| Form NC-PE                 | Yes        |
| Form D-407V                | Yes        |
| <b>North Dakota</b>        |            |
| Schedule K-1 (Form 38)     | Yes        |
| Form 38-EXT                | Yes        |
| Form F-101                 | Yes        |

|                           |            |
|---------------------------|------------|
| Form 38-TC                | Yes        |
| Form 38-EPV               | Yes        |
| Form 38                   | Yes        |
| Form 401-ES               | Yes        |
| <b>Ohio</b>               |            |
| Form IT-1041              | Yes        |
| Form IT-1041ES            | Yes        |
| Form IT-1041P             | Yes        |
| <b>Oklahoma</b>           |            |
| Form WTP10003             | Yes        |
| Form EF-V                 | Yes        |
| Form 500DM                | Yes        |
| Form 561NR-F              | Yes        |
| Schedule K-1 (Form 513NR) | Yes        |
| Schedule K-1 (Form 513)   | Yes        |
| Form WTP 10005            | Yes        |
| Form 504C                 | Yes        |
| Form EF-V                 | Suppressed |
| Form 504                  | Yes        |
| Form 501                  | Yes        |
| Form OW-8-P               | Yes        |
| Form 513                  | Yes        |
| Form 513-NR               | Yes        |
| Form 561-F                | Yes        |
| Form OW-8-ESC             | Yes        |
| Form 500-B                | Yes        |

## Oregon

|                  |     |
|------------------|-----|
| Form 41          | Yes |
| Form 41-V        | Yes |
| Form CT-12S      | Yes |
| Schedule ASC-FID | Yes |

## Pennsylvania

|                            |            |
|----------------------------|------------|
| Form PA-41, Schedule NRK-1 | Yes        |
| Form 8879-F                | Suppressed |
| Form REV-1630F             | Suppressed |
| Form REV-276               | Yes        |
| Form PA-41X                | Yes        |
| Form PA-41, Schedule RK-1  | Yes        |
| Form PA-40ES               | Yes        |
| Form PA-41, Schedule N     | Yes        |
| Form PA-41, Schedule G-L   | Yes        |
| Form PA-41, Schedules J    | Yes        |
| Form PA-41, Schedules E    | Yes        |
| Form PA-41, Schedules DD   | Yes        |
| Form PA-41, Schedules D    | Yes        |
| Form PA-41, Schedule OC    | Yes        |
| Form PA-41V                | Yes        |
| Form PA-41                 | Yes        |
| Form PA-41 Payment Voucher | Yes        |
| Form PA-41, Schedules A,   | Yes        |
| Form PA-41, Schedules B    | Yes        |

## Recipient Output

|                               |            |
|-------------------------------|------------|
| Grantor Information Letter    | Yes        |
| Agency Tax Information Letter | Yes        |
| Footnotes                     | Yes        |
| Tax Exempt Income Schedule    | Yes        |
| Rent and Royalty Schedules    | Yes        |
| Schedule J Letter             | Yes        |
| Beneficiary Greeting Letter   | Yes        |
| Copy To Recipient Output      | Yes        |
| Bar Code Pages                | Yes        |
| Accommodation Letter          | Yes        |
| <b>Rhode Island</b>           |            |
| Schedule M                    | Suppressed |
| Form RI-8736                  | Suppressed |
| Form RI-2210                  | Suppressed |
| Form RI-1041V                 | Suppressed |
| Form RI-1041MU                | Suppressed |
| Form RI-1041-ES               | Suppressed |
| Form RI-1041                  | Suppressed |
| Schedule W                    | Suppressed |
| <b>South Carolina</b>         |            |
| Form SC1041-V                 | Yes        |
| Form SC41                     | Yes        |
| Form SC1041-V                 | Yes        |
| Schedule K-1                  | Yes        |
| Form SC1040TC                 | Yes        |
| Form SC2210                   | Suppressed |

|                           |            |
|---------------------------|------------|
| Form SC1041-T (worksheet) | Yes        |
| Form SC1041ES             | Yes        |
| Form SC1041               | Yes        |
| Form SC8736               | Suppressed |
| <b>Utah</b>               |            |
| Form TC-548               | Yes        |
| Form TC-549               | Yes        |
| Form TC-41                | Yes        |
| Form TC-41A               | Yes        |
| Form TC-41B               | Yes        |
| Form TC-41K               | Yes        |
| Form TC-41K-1             | Yes        |
| Form TC-41N               | Yes        |
| Form TC-41S               | Yes        |
| Form TC-41W               | Yes        |
| Form TC-250               | Yes        |
| <b>Vermont</b>            |            |
| Form FIT-160              | Yes        |
| Form FIT-162              | Yes        |
| Form K-1VT-F              | Yes        |
| Form FIT-165              | Yes        |
| Form FIT-166              | Yes        |
| Form FIT-167              | Yes        |
| Form FIT-168              | Yes        |
| Form 8879-F               | Suppressed |
| Form FIT-161              | Yes        |

## Virginia

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| Form 8879-F | Suppressed |
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| Form 770IP | Yes |
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| Form 770-PMT | Yes |
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|------------|-----|
| Form 770ES | Yes |
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|          |     |
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| Form 770 | Yes |
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|           |     |
|-----------|-----|
| Form 760C | Yes |
|-----------|-----|

## West Virginia

|                          |     |
|--------------------------|-----|
| Form IT-141, Schedule NR | Yes |
|--------------------------|-----|

|                         |     |
|-------------------------|-----|
| Form IT-141, Schedule E | Yes |
|-------------------------|-----|

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|-------------|-----|
| Form IT-141 | Yes |
|-------------|-----|

|                |     |
|----------------|-----|
| Form IT-141QFT | Yes |
|----------------|-----|

|              |     |
|--------------|-----|
| Form IT-141V | Yes |
|--------------|-----|

|               |     |
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| Form WV/NRW-2 | Yes |
|---------------|-----|

|              |     |
|--------------|-----|
| Form IT-141T | Yes |
|--------------|-----|

## Wisconsin

|             |     |
|-------------|-----|
| Schedule 2M | Yes |
|-------------|-----|

|             |     |
|-------------|-----|
| Schedule DE | Yes |
|-------------|-----|

|             |     |
|-------------|-----|
| Schedule CR | Yes |
|-------------|-----|

|             |     |
|-------------|-----|
| Schedule CF | Yes |
|-------------|-----|

|             |     |
|-------------|-----|
| Schedule CC | Yes |
|-------------|-----|

|             |     |
|-------------|-----|
| Schedule JT | Yes |
|-------------|-----|

|             |     |
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| Schedule EC | Yes |
|-------------|-----|

|             |     |
|-------------|-----|
| Schedule AR | Yes |
|-------------|-----|

|               |     |
|---------------|-----|
| Schedule PW-U | Yes |
|---------------|-----|

|               |     |
|---------------|-----|
| Schedule 2K-1 | Yes |
|---------------|-----|

|                |     |
|----------------|-----|
| Form 2         | Yes |
| Form 1-ES      | Yes |
| Schedule BD    | Yes |
| Schedule PW-1  | Yes |
| Schedule EPV   | Yes |
| Schedule HR    | Yes |
| Schedule MA-A  | Yes |
| Schedule MA-M  | Yes |
| Schedule MT    | Yes |
| Schedule NR    | Yes |
| Schedule DC    | Yes |
| Schedule OS    | Yes |
| Schedule ESBT  | Yes |
| Schedule PW-ES | Yes |
| Schedule U     | Yes |
| Schedule VC    | Yes |
| Schedule VCJT  | Yes |
| Schedule WD    | Yes |
| Schedule W-RA  | Yes |
| Schedule ED    | Yes |
| Schedule R     | Yes |

## 990 Federal Forms and Schedules

| Form                                                                                                         | Available for testing |
|--------------------------------------------------------------------------------------------------------------|-----------------------|
| Form 990, Return of Organization Exempt from Income Tax                                                      | Yes                   |
| Form 990 / 990EZ – Schedule A – Public Charity Status and Public Support                                     | Yes                   |
| Form 990 / 990EZ / 990PF – Schedule B – Schedule of Contributors                                             | Yes                   |
| Form 990 / 990EZ – Schedule C – Political Campaign and Lobbying Activities                                   | Yes                   |
| Form 990, Schedule D – Supplemental Financial Statements                                                     | Yes                   |
| Form 990 / 990EZ – Schedule E – Schools                                                                      | Yes                   |
| Form 990, Schedule F – Statement of Activities Outside the United States                                     | Yes                   |
| Form 990 / 990EZ – Schedule G – Supplemental Information Regarding Fundraising or Gaming Activities          | Yes                   |
| Form 990, Schedule I – Grants and Other Assistance to Organizations, Governments and Individuals in the U.S. | Yes                   |
| Form 990, Schedule J – Compensation Information                                                              | Yes                   |
| Form 990, or 990-EZ, Schedule L – Transactions with Interested Persons                                       | Yes                   |
| Form 990, Schedule M – Non-Cash Contributions                                                                | Yes                   |
| Form 990 / 990EZ – Schedule N – Liquidation, Termination, Dissolution, or Significant Disposition of Assets  | Yes                   |
| Form 990, Schedule O – Supplemental Information to Form 990                                                  | Yes                   |
| Form 990, Schedule R – Related Organizations and Unrelated Partnerships                                      | Yes                   |
| Form 990EZ, Short Form - Return of Organization Exempt from Income Tax                                       | Yes                   |
| Form 990-PF, Return of Private Foundation                                                                    | Yes                   |
| Form 990-T, Exempt Organization Business Income Tax Return                                                   | Yes                   |
| Form 1041-ES, Estimated Tax Payments                                                                         | Yes                   |
| Form 2220, Underpayment of Estimated Tax                                                                     | Suppressed            |
| Form 4562, Depreciation and Amortization                                                                     | Yes                   |
| Form 4797, Sales of Business Property (990-T only)                                                           | Yes                   |
| Form 990-T, Schedule D (1041 & 1120) - Capital Gains and Losses                                              | Yes                   |

|                                                                                              |     |
|----------------------------------------------------------------------------------------------|-----|
| Balance Sheet Supporting Schedules                                                           | Yes |
| Depreciation Schedules                                                                       | Yes |
| Detailed Capital Gain and Loss Schedules                                                     | Yes |
| Footnotes                                                                                    | Yes |
| Rent and Royalty Schedules                                                                   | Yes |
| Form 8879-EO, IRS e-file Signature Authorization for an Exempt Organization                  | Yes |
| Depreciation Schedules                                                                       | Yes |
| Rent and Royalty Schedules                                                                   | Yes |
| Form 990, Schedule K - Supplemental Information on Tax-Exempt Bonds                          | Yes |
| Form 8868, Application for Automatic Extension of Time to File an Exempt Organization Return | Yes |



## 990 State Trust Forms and Schedules

| Form                 | Available for testing |
|----------------------|-----------------------|
| <b>California</b>    |                       |
| Form 199             | Yes                   |
| <b>Connecticut</b>   |                       |
| Form CT-990T         | Yes                   |
| <b>Illinois</b>      |                       |
| Form 990IL-T-V       | Yes                   |
| Form 990IL-T         | Yes                   |
| Form IFC             | Yes                   |
| Form AG990-IL        | Yes                   |
| <b>Indiana</b>       |                       |
| Form NP-20           | Yes                   |
| Form IT-20NP         | Yes                   |
| <b>Massachusetts</b> |                       |
| Schedule A2          | Yes                   |
| Form PC – Long Form  | Yes                   |
| <b>New Jersey</b>    |                       |
| Long Form CRI-300RC  | Yes                   |
| Long Form CR-300R    | Yes                   |
| <b>New York</b>      |                       |
| Form 500             | Yes                   |
| <b>Oregon</b>        |                       |
| Form CT-12           | Yes                   |