

ProSystem *fx*® Scan  
with AutoFlow Technology™

# Autoflow Forms & Fields Extracted

Name	Import	Form in Tax - IRS W-2 And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
Employee's social security number	Default	Employee's social security number	32
Employee's name	Default	Employee's name (first, middle initial, last)	48
Employee's address	Default	Employee's name (first, middle initial, last)	49
Employee's city	Default	Employee's name (first, middle initial, last)	50
Employee's state	Default	Employee's name (first, middle initial, last)	51
Employee's zip	Default	Employee's name (first, middle initial, last)	52
Employer identification number	Yes	Employer identification number	40
Employer's name	Yes	Employer's name	41
Employer's address	Yes	Address	42
Employer's city	Yes	City	43
Employer's state	Yes	ST	44
Employer's zip code	Yes	ZIP or postal code	45
Control number	Yes	Control no.	47
1 Wages, tips, and other compensation	Yes	1 Wages, tips, and other compensation	54
2 Federal income tax withheld	Yes	2 Federal income tax withheld	55
3 Social security wages	Yes	3 Social security wages	56
4 Social security tax withheld	Yes	4 Social security tax withheld	57
5 Medicare wages and tips	Yes	5 Medicare wages and tips	58
6 Medicare tax withheld	Yes	6 Medicare tax withheld	59
7 Social security tips	Yes	7 Social security tips	60
8 Allocated tips	Yes	8 Allocated tips	61
10 Dependent care benefits	Yes	10 Dependent care benefits	63
11 Nonqualified plans	Yes	11 Nonqualified plans	64
12 Misc. Code (12a)	Yes	12 See instrs. for box (Code 12a)	65
12 Misc Amount (12a)	Yes	12 See instrs. for box (Amount 12a)	66
12 Misc. Code (12b)	Yes	12 See instrs. for box (Code 12b)	67
12 Misc Amount (12b)	Yes	12 See instrs. for box (Amount 12b)	68
12 Misc. Code (12c)	Yes	12 See instrs. for box (Code 12c)	69
12 Misc Amount (12c)	Yes	12 See instrs. for box (Amount 12c)	70
12 Misc. Code (12d)	Yes	12 See instrs. for box (Code 12d)	71
12 Misc Amount (12d)	Yes	12 See instrs. for box (Amount 12d)	72
13 Statutory employee	Yes	13 Statutory employee	73
13 Retirement plan	Yes	13 Retirement plan	74
13 Third-party sick pay	Yes	13 Third-party sick pay	75
14 Other description	Yes	14 Other Description	76
14 Other amount	Yes	14 Other Amount	77
14 Other description	Yes	14 Other Description	78
14 Other amount	Yes	14 Other Amount	79
14 Other description	Yes	14 Other Description	80
14 Other amount	Yes	14 Other Amount	81
15 State	Yes	15 State	82
15 Employer's state ID number	Yes	15 Employer's state ID No.	83
16 State wages, tips, etc.	Yes	16 State wages, tips, etc.	84
17 State income tax	Yes	17 State income tax	85
18 Local wages, tips, etc.	Yes	18 Local wages, tips, etc.	86
19 Local income tax	Yes	19 Local income tax	87
20 Locality name	Yes	20 Locality name	89
15 State	Yes	15 State	90
15 Employer's state ID number	Yes	15 Employer's state ID No.	91
16 State wages, tips, etc.	Yes	16 State wages, tips, etc.	92
17 State income tax	Yes	17 State income tax	93
18 Local wages, tips, etc.	Yes	18 Local wages, tips, etc.	94
19 Local income tax	Yes	19 Local income tax	95
20 Locality name	Yes	20 Locality name	97

Name	Import	Form in Tax - IRS W-2G And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
Payer's name	Yes	Payer's name	35
Payer's street address	Yes	Street address	36
Payer's city	Yes	City	37
Payer's state	Yes	State	38
Payer's zip	Yes	ZIP or postal code	39
Payer's federal identification number	Yes	Federal Id number	42
Payer's telephone number	Yes	Telephone number	43
Winner's name	Default	Winner's name	44
Winner's address	Default	Street address (including apt. no)	45
Winner's city	Default	City	46
Winner's state	Default	State	47
Winner's zip code	Default	ZIP or postal code	48
1 Gross winnings	Yes	1 Gross winnings	51
2 Federal income tax withheld	Yes	2 Federal income tax withheld	52
3 Type of wager	Yes	3 Type of wager	53
4 Date won	Yes	4 Date won	54
5 Transaction	Yes	5 Transaction	55
6 Race	Yes	6 Race	56
7 Winnings from identical wagers	Yes	7 Identical wagers	57
8 Cashier	Yes	8 Cashier	58
9 Winner's TIN	Default	9 ID number	59
10 Window	Yes	10 Window	60
11 First ID	Yes	11 First ID	61
12 Second ID	Yes	12 Second ID	62
13 State / Payer's state ID number	Yes	Payer's state ID number	71
14 State winnings	Yes	State winnings	72
15 State income tax withheld	Yes	State income tax	73
16 Local winnings	Yes	Local winnings	74
17 Local income tax withheld	Yes	Local income tax	75
18 Name of locality	Yes	Locality name	77

Name	Import	Form in Tax - IRS 1098-MIS And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Payer's name	Default	Payer's/Borrower's name	44
Payer's identification number	Default	Payer's social security number	42
Recipient's identification number	Yes	Recipient's federal identification no.	41
Recipient's/Lender's name	Yes	Recipient's/Lender's name, address, and telephone number	34
Recipient's/Lender's address	Yes	Recipient's/Lender's name, address, and telephone number	35
Recipient's/Lender's city	Yes	Recipient's/Lender's name, address, and telephone number	36
Recipient's/Lender's state	Yes	Recipient's/Lender's name, address, and telephone number	37
Recipient's/Lender's zip	Yes	Recipient's/Lender's name, address, and telephone number	38
1 Mortgage interest received from payer	Yes	1 Mortgage interest received from payer(s)/borrower(s)	43
2 Points paid	Yes	2 Points paid or purchase of principal residence	45
4 Mortgage insurance premiums	Yes	4 Mortgage insurance premiums	51
5 Real estate taxes paid	Yes	5 Taxes	53

Name	Import	Form in Tax - IRS 1098-E And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Recipient's federal identification number	Yes	Recipient's federal identification number	48
Recipient's/Lender's name	Yes	Recipient's/Lender's name	40
Recipient's/Lender's address	Yes	Recipient's/Lender's street address	41
Recipient's/Lender's city	Yes	Recipient's/Lender's city	42
Recipient's/Lender's state	Yes	Recipient's/Lender's state	43
Recipient's/Lender's zip code	Yes	Recipient's/Lender's zip	44
Recipient's/Lender's telephone number	Yes	Telephone number	47
Account number	Yes	Account number	57
Borrower's name	Default	Borrower's name	50
Borrower's address	Default	Borrower's street address	51
Borrower's city	Default	Borrower's city	52
Borrower's state	Default	Borrower's state	53
Borrower's zip code	Default	Borrower's zip	54
Borrower's social security number	Default	Borrower's social security number	49
1 Student loan interest received by lender	Yes	1 Student loan interest received by lender	60
2 Check if box 1 does not include loan origination fees	Yes	2 Check if box 1 does not include loan origination fees and/or capitalized interest, and the loan was made before September 1, 2004	61

Name	Import	Form in Tax - IRS 1098-T And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
Filer's identification number	Yes	Filer's identification number	46
Filer's name	Yes	Filer's name	40
Filer's address	Yes	Street address	41
Filer's city	Yes	City	42
Filer's state	Yes	State	43
Filer's zip	Yes	ZIP code	44
Filer's phone number	Yes	Telephone number	45
Student's first name	Yes	Student's name	48
Student's last name	Yes	Student's name	49
Student's address	Default	Street address	50
Student's city	Default	City	51
Student's state	Default	State	52
Student's zip	Default	ZIP code	53
Student's SSN	Yes	Student's social security number	47
Service provider / account number	Yes	Service provider / account number	54
1 Payments received for qualified tuition and related expenses	Yes	1 Payments received for qualified tuition and related expenses	60
2 Amounts billed for qualified tuition and related expenses	Yes	2 Amounts billed for qualified tuition and related expenses	61
5 Scholarships or grants	Yes	5. Scholarships or grants	64
8 Check if at least half-time student	Yes	8 Check if at least half-time student	55
9 Check if graduate student	Yes	9 Check if graduate student	67
10 Insurance contract reimb. / refund	Yes	10 Insurance contract reimb. / refund	68

Name	Import	Form in Tax - IRS 1099-DIV And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Payer's name	Yes	Payer's name	40
Payer's street address	Yes	Street address	41
Payer's city	Yes	City	42
Payer's state	Yes	State	43
Payer's zip	Yes	ZIP code	44
Payer's federal identification number	Yes	Payer's federal identification number	49
Recipient's identification number	Default	Recipient's identification number	50
Recipient's name	Default	Recipient's name	51
Recipient's street address	Default	Street Address (including apt. no.)	52
Recipient's city	Default	City	53
Recipient's state	Default	State	54
Recipient's zip	Default	ZIP or postal code	55
Account number	Yes	Account number	58
1a Total ordinary dividends	Yes	1a Total ordinary dividends	70
1b Qualified dividends	Yes	1b Qualified dividends	71
2a Total capital gain distr	Yes	2a Total capital gain distr.	72
2b Unrecap. Sec 1250 gain	Yes	2b Unrecap. Sec. 1250 gain	73
2c Section 1202 gain	Yes	2c Section 1202 gain	74
2d Collectibles (28%) gain	Yes	2d Collectibles (28%) gain	75
3 Nondividend distributions	Yes	3 Nondividend distributions	76
4 Federal income tax withheld	Yes	4 Federal income tax withheld	77
5 Investment expenses	Yes	5 Investment expenses	78
6 Foreign tax paid	Yes	6 Foreign tax paid	79
7 Foreign country or US possession	Yes	7 Foreign country or U.S. possession	80
10 Exempt-interest dividends	Yes	10 Exempt-interest dividends	83
11 Specified private activity bond interest dividends	Yes	11 Specified private activity bond interest div.	84
12 State	Yes	12 State	85
13 State identification number	Yes	13 State identification no.	86
14 State income tax withheld	Yes	14 State tax withheld	87

Name	Import	Form in Tax - IRS 1099-G And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Payer's federal identification	Yes	Payer's federal identification no.	46
Payer's name	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	40
Payer's address	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	41
Payer's city	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	42
Payer's state	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	43
Payer's zip	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	44
Payer's Phone Number	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	45
State ID or account number	Yes	Account number (See instructions)	55
Recipient's identification number	Default	Recipient's identification number	47
Recipient's name	Default	Recipient's name	48
1 Unemployment amount	Yes	1 Unemployment compensation	60
2 State refunds, credits or offsets	Yes	2 State tax refund, credit or offset	61
3 Tax year	Yes	3 Box 2 amounts is for tax year	63
4 Federal income tax withholding	Yes	4 Federal income tax withheld	64
5 ATAA payments	Yes	5 RTAA payments	65
6 Taxable grants	Yes	6 Taxable grants	66
7 Agriculture payments	Yes	7 Agriculture payments	67
8 Check if trade or business	Yes	8 Check if box 2 is trade or business income	68
10a State	Yes	10a State	70
10b State identification number	Yes	10b State identification no.	71
11 State income tax withheld	Yes	11 State income tax withheld	72
Repayment amount	Yes	Compensation repaid in 2014	100



Name	Import	Form in Tax - IRS 1099-INT And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Payer's name	Yes	Payers Name	40
Payer's address	Yes	Street Address	41
Payer's city	Yes	City	42
Payer's state	Yes	State	43
Payer's zip	Yes	Zip Code	44
Payer's identification number	Yes	Payers federal identification number	49
Recipient's name	Default	Recipient's name	51
Recipient's address	Default	Street Address (including apt. no.)	52
Recipient's city	Default	City	53
Recipient's state	Default	State	54
Recipient's zip	Default	ZIP or postal code	55
Recipient's identification number	Default	Recipient's identification number	50
Account number	Yes	Account number	58
1 - Interest income	Yes	1 - Interest income	71
2 - Early withdrawal penalty	Yes	2 - Early withdrawal penalty	72
3 - Interest on savings bonds	Yes	3 - Interest on US Savings bonds and Treas. Obligations	73
4 - Federal income tax withheld	Yes	4 - Federal income tax withheld	74
5 - Investment expenses	Yes	5 - Investment expenses	75
6 - Foreign tax paid	Yes	6 - Foreign tax paid	77
7 - Foreign country	Yes	7 - Foreign country or US possession	78
8 - Tax exempt interest	Yes	8 - Tax-exempt interest	79
9 - Specified private act. bond interest	Yes	9 - Specified private activity bond interest	80
10 - Market discount	Yes	10 - Market discount	87
11 - Bond premium	Yes	11 - Bond premium	88
10 - Tax-Exempt Bond CUSIP No.	Yes	10 - Tax-exempt bond CUSIP no.	81
11 - State	Yes	11 - State	82
12 - State Identification Number	Yes	12 - State ID no.	83
13 - State Income Tax Withheld	Yes	13 - State tax withheld	84

Name	Import	Form in Tax - IRS 1099-MISC And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Payer's name	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	40
Payer's address	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	41
Payer's city	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	42
Payer's state	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	43
Payer's zip	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	44
Payer's telephone number	Yes	Payer's name, street address, city, state, ZIP code and telephone no.	47
Payer's federal identification	Yes	Payer's federal identification number	48
Recipient's identification number	Default	Recipient's identification number	49
Recipient's name	Default	Recipient's name	50
Recipient's street address	Default	Street address (including apt. no)	51
Recipient's city	Default	City	52
Recipient's state	Default	State	53
Recipient's zip code	Default	ZIP or foreign postal code	54
1 Rents	Yes	1 Rents	65
2 Royalties	Yes	2 Royalties	66
3 Other income	Yes	3 Other income	67
4 Federal income tax withheld	Yes	4 Federal income tax withheld	68
5 Fishing boat proceeds	Yes	5 Fishing boat proceeds	69
6 Medical and health care payments	Yes	6 Medical and health care payments	70
7 Nonemployee compensation	Yes	7 Nonemployee compensation	71
8 Substitute payments in lieu of	Yes	8 Substitute payments in lieu of dividends or interest	72
10 Crop insurance proceeds	Yes	10 Crop insurance proceeds	74
13 Excess golden parachute payments	Yes	13 Excess golden parachute payments	77
14 Gross proceeds paid to an attorney	Yes	14 Gross proceeds paid to an attorney	78
16 State tax withheld	Yes	16 State tax withheld	79
17 State/Payer's state no.	Yes	17 State/Payer's state number	80
18 State income	Yes	18 State income	81

Name	Import	Form in Tax - IRS 1099-Q And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
Payer's federal identification number	Yes	Payer's Federal identification number	46
Payer's name	Yes	Payer's/Trustees name, street address, city, state, ZIP code and telephone number	40
Payer's address	Yes	Payer's/Trustees name, street address, city, state, ZIP code and telephone number	41
Payer's city	Yes	Payer's/Trustees name, street address, city, state, ZIP code and telephone number	42
Payer's state	Yes	Payer's/Trustees name, street address, city, state, ZIP code and telephone number	43
Payer's zip	Yes	Payer's/Trustees name, street address, city, state, ZIP code and telephone number	44
Payer's phone number	Yes	Payer's/Trustees name, street address, city, state, ZIP code and telephone number	45
Recipient's federal identification number	Default	Recipient's identification number	47
Recipient's name	Default	Recipient's name	48
Recipient's address	Default	Street Address (including apt. no.)	49
Recipient's city	Default	City	50
Recipient's state	Default	State	51
Recipient's zip	Default	ZIP code	52
Account number	Yes	Account number	53
1 Gross distribution	Yes	1 Gross distribution	55
2 Earnings	Yes	2 Earnings	56
3 Basis	Yes	3 Basis	57
4 Trustee to trustee transfer	Yes	4 Trustee to trustee transfer	58
5 Qualified tuition program - private	Yes	5 Qualified tuition program - private	59
5 Qualified tuition program - state	Yes	5 Qualified tuition program - state	60
5 Coverdell ESA	Yes	5 Coverdell ESA	61

Name	Import	Form in Tax - IRS 1099-R And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Payer's name	Yes	Payer's name	40
Payer's address	Yes	Street address	41
Payer's city	Yes	City	42
Payer's state	Yes	State	43
Payer's ZIP	Yes	ZIP or Postal code	44
Payer's federal identification number	Yes	Payer's federal identification number	47
Recipient's identification number	Default	Recipient's identification number	48
Recipient's name	Default	Recipient's name, address, city, state, ZIP or postal code, and foreign country code	49
Recipient's street address	Default	Recipient's name, address, city, state, ZIP or postal code, and foreign country code	50
Recipient's city	Default	Recipient's name, address, city, state, ZIP or postal code, and foreign country code	51
Recipient's state	Default	Recipient's name, address, city, state, ZIP or postal code, and foreign country code	52
Recipient's zip code	Default	Recipient's name, address, city, state, ZIP or postal code, and foreign country code	53
Account number	Yes	Account number	84
1 Gross distribution	Yes	1 Gross distribution	56
2a Taxable amount	Yes	2a Taxable amount	57
3 Capital gain included in box 2a	Yes	3 Capital gain (included in box 2a)	60
4 Federal income tax withheld	Yes	4 Federal income tax withheld	61
5 Employer contributions or insurance premiums/designated Roth basis	Yes	5 Employer contributions/designated Roth contribution or insurance premiums	62
6 Net unrealized appreciation in employer's securities	Yes	6 Net unrealized appreciation in employer's securities	63
7 Distribution code	Yes	7 Distribution code	64
IRA / SEP / SIMPLE	Yes	IRA / SEP / SIMPLE	65
8 Other distribution	Yes	8 Other	66
8 Other percent	Yes	Blank	67
9a Your percentage of total distribution	Yes	9a Your percentage of total distribution	68
9b Total employee contributions	Yes	9b Total employee contributions	69
12 State tax withheld	Yes	12 State tax withheld	72
13 State / Payer's state number	Yes	13 State / Payer's state no.	73
14 State distribution	Yes	14 State distribution	74
15 Local tax withheld	Yes	15 Local tax withheld	78
16 Name of locality	Yes	16 Name of locality	79
17 Local distribution	Yes	17 Local distribution	80

Name	Import	Form in Tax - IRS 1099-SA And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
PAYER'S federal identification number	Yes	PAYER'S federal identification number	48
TRUSTEE'S/PAYER'S name, street address, city, state, and ZIP code	Yes	Trustee's/Payer's Name	40
TRUSTEE'S/PAYER'S name, street address, city, state, and ZIP code	Yes	Street Address	41
TRUSTEE'S/PAYER'S name, street address, city, state, and ZIP code	Yes	City	42
TRUSTEE'S/PAYER'S name, street address, city, state, and ZIP code	Yes	State	43
TRUSTEE'S/PAYER'S name, street address, city, state, and ZIP code	Yes	ZIP or ppostal code	44
Payer's phone number	Yes	Telephone number	47
RECIPIENT'S identification number	Default	RECIPIENT'S identification number	49
RECIPIENT'S name	Default	RECIPIENT'S name	50
Street address (including apt no)	Default	Street Address (including apt. no.)	51
City, state, and ZIP code	Default	City	52
City, state, and ZIP code	Default	State	53
City, state, and ZIP code	Default	ZIP or postal code	54
Account number (seeinstructions)	Yes	Account number (See instr.)*	57
1 Gross distribution	Yes	1 Gross distribution	60
2 Earnings on excess cont	Yes	2 Earnings on excess cont.	61
3 Distribution code	Yes	3 Distribution code	62
4 FMV on date of death	Yes	4 FMV on date of death	63
5 HAS	Yes	5 HAS	64
5 Archer MSA	Yes	5 Archer MSA	65
5 MA MSA	Yes	5 MA MSA	66

Name	Import	Form in Tax - IRS SSA-1099 And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
1 Name	Default	1 Name	40
2 Employee's social security number	Default	2 Beneficiary's social security number	41
3 Benefits paid	Yes	3 Benefits paid in 20XX	42
4 Benefits repaid to SSA	Yes	4 Benefits Repaid to SSA in 20XX	43
Medicare Premiums Withheld	Yes	Medicare Premiums Withheld	102
Prescription Drug Coverage Insurance	Yes	Prescription drug coverage insurance	104
6 Voluntary income tax withholding	Yes	6 Voluntary Federal Income Tax Withholding	47
8 Claim number	Yes	8 Claim number (Use this number if you need to contact SSA)	51

Name	Import	Form in Tax - IRS K-1 1041 And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
Beneficiary ID	Default	Beneficiary's identifying number	53
Beneficiary Name	Default	Beneficiary's name, address, city, state and ZIP code	54
Beneficiary Address	Default	Beneficiary's name, address, city, state and ZIP code	55
Beneficiary City, State, Zip Code	Default	Beneficiary's name, address, city, state and ZIP code	56
Estate EIN	Yes	Estate's or trust's employer identification number	40
Estate Name	Yes	Estate's or trusts name	41
Fiduciary's Name	Yes	Fiduciary's name, address, city, state and ZIP code	42
Fiduciary's Address	Yes	Fiduciary's name, address, city, state and ZIP code	43
Fiduciary's City	Yes	Fiduciary's name, address, city, state and ZIP code	44
Fiduciary's State	Yes	Fiduciary's name, address, city, state and ZIP code	45
Fiduciary's Zip Code	Yes	Fiduciary's name, address, city, state and ZIP code	46
Form 1041-T Filed	Yes	Check if Form 1041-T was filed	47
Form 1041-T Date	Yes	Enter the date it was filed	48
Final Form 1041 for estate or trust	Yes	Check if this is the Final 1041 for the estate or trust	49
Tax Shelter registration number	Yes	Tax Shelter registration number	51
Domestic Beneficiary	Yes	Domestic Beneficiary	57
Foreign Beneficiary	Yes	Foreign Beneficiary	58
Interest Income	Yes	Interest Income	70
Ordinary Dividends	Yes	Ordinary Dividends	72
Qualified Dividends	Yes	Qualified Dividends	74
Net Short Term Capital Gain or Loss	Yes	Net Short Term Capital Gains	76
Net Long Term Capital Gain or Loss	Yes	Net Long Term Capital Gains	78
28% rate gain	Yes	28% rate gain	80
Unrecaptured Section 1250 Gain	Yes	Unrecaptured Section 1250 Gain	82
Other Portfolio and nonbusiness income	Yes	Other Portfolio income and nonbusiness income	84
Ordinary Business Income	Yes	Ordinary Business Income	86
Net Rental Real Estate Income	Yes	Net Rental Real Estate Income	88
Other Rental Income	Yes	Other Rental Income	90
Estate Tax Deduction	Yes	Estate Tax Deduction	98
Directly apportioned deductions	Yes	Directly apportioned deductions - (A,B,C)	92, 94, 96
Final year deductions	Yes	Final year deductions - (A, B, C, D, E)	100, 102, 104, 106, 108
Alternative minimum tax adjustment	Yes	Alternative minimum tax items - (A, B, C, D, E, F, G, H, I, J)	110, 112, 113, 115, 116, 118, 120, 122, 124, 126
Credits and credit recapture	Yes	Credits and credit recapture - (D, F, G, H, I, K, L, M, N, O, P, Q, R, S, T)	135, 140, 141, 142, 143, 146, 147, 148, 149, 150, 151, 152, 153, 154, 155
Other information	Yes	Other information - (C, D, E, F, G)	212, 214, 215, 217, 218
Final K-1	Yes	X if 100% disp	34

Name	Import	Form in Tax - IRS K-1 1065 And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
Partnership's EIN	Yes	A - Partnership's employer identification number	45
Partnership Name	Yes	B - Partnership Name, address, city, state and ZIP code	46
Partnership Address	Yes	B - Partnership Name, address, city, state and ZIP code	47
Partnership City	Yes	B - Partnership Name, address, city, state and ZIP code	48
Partnership State	Yes	B - Partnership Name, address, city, state and ZIP code	49
Partnership Zip	Yes	B - Partnership Name, address, city, state and ZIP code	50
X If Publicly Traded Partnership	Yes	D - Check If this is a publicly traded partnership (PTP)	52
Partner's Identifying Number	Default	E - Partner's Identifying Number	56
Partner's Name	Default	F - Partner's name, address, city, state and ZIP code	57
Partner's Address	Default	F - Partner's name, address, city, state and ZIP code	58
Partner's City, State, Zip	Default	F - Partner's name, address, city, state and ZIP code	59
Type of Partner (General)	Yes	G - General partner or LLC member-manager	60
Type of Partner (Limited)	Yes	G - Limited partner or other LLC member	61
Partner Entity Type (Domestic)	Yes	H - Domestic partner	62
Partner Entity Type (Foreign)	Yes	H- Foreign partner	63
What type of Entity is partner?	Yes	I - What type of Entity is partner?	64
Partner's Profit % (Beginning)	Yes	J - Partner's share of Profit % (Beginning)	65
Partner's Profit % (Ending)	Yes	J - Partner's share of Profit % (Ending)	66
Partner's Loss % (Beginning)	Yes	J - Partner's share of Loss % (Beginning)	67
Partner's Loss % (Ending)	Yes	J - Partner's share of Loss % (Ending)	68
Partner's Capital % (Beginning)	Yes	J - Partner's share of Capital % (Beginning)	69
Partner's Capital % (Ending)	Yes	J - Partner's share of Capital % (Ending)	70
Partner's share of Liabilities (Nonrecourse)	Yes	K - Partner's share of Liabilities at year end (Nonrecourse)	71
Partner's share of Liabilities (Qualified Non-Rec.)	Yes	K - Partner's share of Liabilities at year end (Qualified Nonrecourse financing)	72
Partner's share of Liabilities (Recourse)	Yes	K - Partner's share of Liabilities at year end (Recourse)	73
Beginning Capital Account	Yes	L - Partner's capital account analysis: Beginning Capital Account	74
Capital Contributed	Yes	L - Partner's capital account analysis: Capital Contributed during the year	75
Current Year Increase	Yes	L - Partner's capital account analysis: Current Year Increase (decrease)	76
Withdrawals & Distributions	Yes	L - Partner's capital account analysis: Withdrawals & Distributions	77
Ending Capital Account	Yes	L - Partner's capital account analysis: Ending Capital Account	78
Tax Basis	Yes	L - Tax Basis	79
GAAP	Yes	L - GAAP	80
Section 704(b)	Yes	L - Section 704(b) book	81
Other	Yes	L - Other	82
Explain	Yes	L- Explain	83
Ordinary Business Income or Loss	Yes	1 - Ordinary Business Income (loss)	93
Other Net Rental Real Estate Inc. or Loss	Yes	2 - Net Rental Real Estate Income (loss)	95
Other Net Rental Income or Loss	Yes	3 - Other Net Rental Income (loss)	97
Guaranteed Payments	Yes	4 - Guaranteed Payments	99
Interest Income	Yes	5 - Interest Income	101
Ordinary Dividends	Yes	6a - Ordinary Dividends	104



Name	Import	Form in Tax - IRS K-1 1065 And Field Names in Tax	Field Number in Tax
Qualified Dividends	Yes	6b - Qualified Dividends	106
Royalties	Yes	7 - Royalties	108
Net Short Term Capital Gain or Loss	Yes	8 - Net Short Term Capital Gain (loss)	110
Net Long Term Capital Gain or Loss	Yes	9a - Net Long Term Capital Gain (loss)	112
Collectible (28%) Gain or Loss	Yes	9b - Collectibles (28%) Gain (loss)	114
Unrecaptured Section 1250 Gain	Yes	9c - Unrecaptured Section 1250 Gain	115
Net Section 1231 Gain or Loss	Yes	10 - Net Section 1231 Gain (loss)	116
Sec. 179 Expense	Yes	12 - Section 179 deduction	130
Other income (loss)	Yes	11 - Other income (loss) - (A, C, F)	118, 120, 125
Other deductions	Yes	13 - Other deductions - (A, B, C, D, E, F, G, H, I, J, K, L, M, O, V, W)	132, 134, 136, 138, 140, 142, 144, 146, 148, 151, 152, 154, 156, 158, 189, 191
Self-employment earnings (loss)	Yes	14 - Self-employment earnings (loss) - (A, B, C)	192, 194, 195
Credits	Yes	15 - Credits - (A/B, C/D, E, F, G, H, I, J, K, L, M, N, P)	196, 197, 198, 201, 204, 205, 206, 207, 208, 209, 210, 211, 217
Foreign transactions	Yes	16 - Foreign transactions - (B, D/E/F, I/J/K, L, M, N, O, P)	223, 224, 225, 226, 227, 228, 229, 230
Alternative min tax (AMT) items	Yes	17 - Alternative min tax (AMT) items - (A, B, C, D, E)	250, 252, 254, 256, 257
Tax-exempt income and nondeductible expenses	Yes	18 - Tax-exempt income and nondeductible expenses - (B, C)	292, 293
Distributions	Yes	19 - Distributions - (A, B)	295, 296
Other information	Yes	20 - Other information - (A, B, D, F, G, I, O, P, Y,Z)	297, 299, 301, 306, 307, 330, 344, 345, 404, 362
Final K-1	Yes	X if 100% disp	36

Name	Import	Form in Tax - IRS K-1 1120S And Field Names in Tax	Field Number in Tax
TSJ	Yes	TS	30
Shareholder's ID	Default	Shareholder's identifying number	54
Shareholder's Name	Default	Shareholder's name, address, city, state and ZIP code	55
Shareholder's Address	Default	Shareholder's name, address, city, state and ZIP code	56
Shareholder's City, State, Zip Code	Default	Shareholder's name, address, city, state and ZIP code	57
Corporation's EIN	Yes	Corporation's employee identification number	44
Corporation's Name	Yes	Corporation's name, address, city, state and ZIP code	45
Corporation's Address	Yes	Corporation's name, address, city, state and ZIP code	46
Corporation's City	Yes	Corporation's name, address, city, state and ZIP code	47
Corporation's State	Yes	Corporation's name, address, city, state and ZIP code	48
Corporation's Zip Code	Yes	Corporation's name, address, city, state and ZIP code	49
Tax Shelter registration number	Yes	Tax Shelter registration number	52
Shareholder's percentage of stock ownership	Yes	Shareholder's percentage of stock ownership for tax year	58
Ordinary Business Income or Loss	Yes	Ordinary Business Income (loss)	68
Net Rental Estate Inc or Loss	Yes	Net Rental Estate Inc (loss)	70
Other Net Rental Income or Loss	Yes	Other Net Rental Income (loss)	72
Interest Income	Yes	Interest Income	74
Ordinary Dividends	Yes	Ordinary Dividends	77
Qualified Dividends	Yes	Qualified Dividends	79
Royalties	Yes	Royalties	81
Net Short Term Capital Gain or Loss	Yes	Net Short Term Capital Gain (loss)	83
Net Long Term Capital Gain or Loss	Yes	Net Long Term Capital Gain (loss)	85
Collectible (28%) Gain or Loss	Yes	Collectible (28%) Gain (loss)	87
Unrecaptured Section 1250 Gain	Yes	Unrecaptured Section 1250 Gain	89
Net Section 1231 Gain or Loss	Yes	Net Section 1231 Gain (loss)	91
Sec 179 Expense	Yes	Section 179 Expense	100
Other income (loss)	Yes	Other income (loss) - A, C, E	93, 95, 98
Other deductions	Yes	Other deductions - (A, B, C, D, E, F, G, H, I, J, K, L, Q, R, S)	102, 104, 106, 108, 110, 112, 114, 116, 118, 118, 121, 122, 124, 151, 153, 155
Credits	Yes	Credits - ( A/B, C/D, E, F, G, H, I, J, K, L, M, N, O, P)	156, 157, 158, 161, 164, 165, 166, 167, 168, 169, 170, 172, 173, 178
Foreign transactions	Yes	Foreign transactions - (B, D/E/F, I/J/K, L, M, N, O, P)	183, 184, 185, 186, 187, 188, 189, 190
Alternative minimum tax (AMT) items	Yes	Alternative minimum tax (AMT) items - (A, B, C, D, E)	215, 217, 219, 221, 223
Items affecting shareholder basis	Yes	Items affecting shareholder basis - (B, C, D, E)	262, 263, 264, 265
Other Information	Yes	Other Information - (A, B, C, E, F, H, M, N, U, V)	266, 268, 270, 280, 281, 304, 318, 319, 337, 336
Final K-1	Yes	X if 100% disposition	36

Name	Import	Form in Tax - CN-1, CN-2, CN-3 And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	36
Payer's federal identification	Yes	Federal ID	46
Payer's name	Yes	Name	30
Payer's address	Yes	Street Address	31
Payer's city	Yes	City	32
Payer's state	Yes	State	33
Payer's zip	Yes	ZIP code	34
Payer's telephone number	Yes	Phone Number	35
Payer's RTN	Yes	Payer's RTN	45
Account number	Yes	Account number	44
Recipient's identification number	Default	ID number	56
Recipient's name	Default	Name	49
Recipient's street address	Default	Street Address	50
Recipient's city	Default	City	51
Recipient's state	Default	State	52
Recipient's zip	Default	ZIP code	53
<b>1099-INT</b>		<b>Fields below appear in Interest Income section of CN-1 Sheet 1</b>	
1 Interest income	Yes	Savings/Loans/Bank and Other	71
2 Early withdrawal penalty	Yes	Special Interest	74
3 Interest on US savings bonds and obligations	Yes	U.S. Bonds and Obligations	72
4 Federal income tax withheld	Yes	Federal withholding	90
5 Investment expenses	Yes	Investment expenses	84
6 Foreign tax paid	Yes	U.S. Amount	107
7 Foreign country or US possession	Yes	Name of Foreign Country Imposing Tax - Override	102
8 Tax exempt interest	Yes	Tax-Exempt Interest - State Nontaxable	80
9 Specified private activity bond interest	Yes	Tax-Exempt Interest - Amt or Pct Subject to AMT	83
10 Market discount	Yes	Market Discount	79
11 Bond premium	Yes	Bond Premium	75
12 Tax-exempt bond CUSIP no.	Yes	Tax Exempt Bond CUSIP No.	114
13 State	Yes	State	38
14 State ID no.	Yes	Payer's Federal / State ID Number (State Use Only)	94
15 State tax withheld	Yes	State Withholding	91
<b>1099-OID</b>		<b>Fields below appear in Interest Income section of CN-1 Sheet 2</b>	
1 Original issue discount	Yes	Form 1099-OID Original Issue Income Discount Income	85
2 Other periodic interest	Yes	Savings/Loans/Bank and Other	71
4 Federal income tax withheld	Yes	Federal withholding	90
6 Original issue discount on U.S. treasury ob.	Yes	U.S. Bonds and Obligations	72
7 Investment expenses	Yes	Investment expenses	84
<b>1099-DIV</b>		<b>Fields below appear in Dividend Income section of CN-2</b>	
1a Total ordinary dividends	Yes	Box 1a Total Ordinary Dividends	31
1b Qualified dividends	Yes	Box 1b Qualified Dividends	32
2a Total capital gains distr	Yes	Box 2a Total Capital Gain Distribution	34
2b Unrecap. Sec 1250 gain	Yes	Box 2b Unrecap Sec 1250 Gain	40
2c Section 1202 gain	Yes	Box 2c Section 1202 Gain	41
2d Collectibles (28%) gain	Yes	Box 2d Collectibles (28%) Gain	42
3 Nondividend distributions	Yes	Box 3 Nondividend Distribution	43
4 Federal income tax withheld	Yes	Box 4 Federal Withholding	44
5 Investment expenses	Yes	Box 5 Investment Expenses	45
6 Foreign tax paid	Yes	U.S. Amount	77
7 Foreign country or US possession	Yes	Name of Foreign Country Imposing Tax - Override	72
10 Exempt-interest dividends	Yes	Tax-Exempt Interest - State Nontaxable	50
11 Specified private activity bond interest dividends	Yes	Tax-Exempt Interest - Amt or Pct Subject to AMT	53
13 State identification number	Yes	Payer's State ID Number	60
14 State income tax withheld	Yes	State Withholding	55
<b>1099-MISC</b>		<b>Fields below appear in Miscellaneous Income section of CN-3</b>	
3 Other income	Yes	Other income	34
4 Federal income tax withheld	Yes	Federal Income Tax Withheld	35

Name	Import	Form in Tax - Form D-1 And Field Names in Tax	Field Number in Tax
Description	Yes	Description	30, 37, 44, 51
Shares	Yes	Description	30, 37, 44, 51
1099-B code	Yes	1099-B Code	33, 40, 47, 54
Date acquired	Yes	Date Acquired	60, 69, 78, 87
Date sold	Yes	Date Sold	61, 70, 79, 88
Sales price	Yes	Gross Sales Price	62, 71, 80, 89
Cost or other basis	Yes	Cost or Other Basis	63, 72, 81, 90
Form 8949 Code - Code 1	Yes	Form 8949 Code (See Guide)	101, 112, 123, 134
Adjustment - Override	Yes	Adjustment - Override	100, 111, 122, 133

Name	Import	Form in Tax - IRS 2439 And Field Names in Tax	Field Number in Tax
TSJ	Yes	TSJ	30
Payer's name	Yes	Name	40
Payer's address	Yes	Street address	41
Payer's city	Yes	City	42
Payer's state	Yes	State	43
Payer's zip	Yes	ZIP or postal code	44
Payer's federal identification number	Yes	Identification number of RIC or REIT	46
Recipient's federal identification number	Default	Shareholders's identifying number	47
Recipient's name	Default	Shareholders's name	48
Recipient's address	Default	Street address	49
Recipient's city	Default	City	50
Recipient's state	Default	State	51
Recipient's zip	Default	ZIP or postal code	52
1a Total undistributed long-term capital gain	Yes	1a Total undistributed long-term capital gains	60
1b Unrecaptured Section 1250 gain	Yes	1b Unrecaptured section 1250 gain	61
2 Tax paid	Yes	2 Tax paid by the RIC or REIT on the box 1A gains	64