

ProSystem *fx*® Scan
with AutoFlow Technology™

Autoflow Forms & Fields Extracted

Name	Import	Form in Tax - IRS K-1 1041 And Field Names in Tax	Field Number in Tax
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	41
Estate Name	Yes	Estate's or trusts name	42
Fiduciary's Name	Yes	Fiduciary's name, address, city, state and ZIP code	43
Fiduciary's Address	Yes	Fiduciary's name, address, city, state and ZIP code	44
Fiduciary's City	Yes	Fiduciary's name, address, city, state and ZIP code	45
Fiduciary's State	Yes	Fiduciary's name, address, city, state and ZIP code	46
Fiduciary's Zip Code	Yes	Fiduciary's name, address, city, state and ZIP code	47
Form 1041-T Filed	Yes	Check if Form 1041-T was filed	50
Form 1041-T Date	Yes	Enter the date it was filed	51
Final Form 1041 for estate or trust	Yes	Check if this is the Final 1041 for the estate or trust	52
Domestic Beneficiary	Yes	Domestic Beneficiary	57
Foreign Beneficiary	Yes	Foreign Beneficiary	58
Interest Income	Yes	Interest Income	66
Ordinary Dividends	Yes	Ordinary Dividends	68
Qualified Dividends	Yes	Qualified Dividends	70
Net Short Term Capital Gain or Loss	Yes	Net Short Term Capital Gains	72
Net Long Term Capital Gain or Loss	Yes	Net Long Term Capital Gains	74
28% rate gain	Yes	28% rate gain	76
Unrecaptured Section 1250 Gain	Yes	Unrecaptured Section 1250 Gain	77
Other Portfolio and nonbusiness income	Yes	Other Portfolio income and nonbusiness income	78
Ordinary Business Income	Yes	Ordinary Business Income	80
Net Rental Real Estate Income	Yes	Net Rental Real Estate Income	82
Other Rental Income	Yes	Other Rental Income	84
Estate Tax Deduction	Yes	Estate Tax Deduction	92
Directly apportioned deductions	Yes	Directly apportioned deductions - (A,B,C)	86, 88, 90
Final year deductions	Yes	Final year deductions - (A, B, C)	93, 95, 97
Alternative minimum tax adjustment	Yes	Alternative minimum tax items - (A, B, C, D, E, F, G, H, I, J)	100, 102, 103, 104, 106, 107, 108, 110, 111, 112
Credits and credit recapture	Yes	Credits and credit recapture - (A, B, D, F, G, H, I, K, L, M, N, O, P, Q, R, S, T)	114, 116, 120, 125, 126, 127, 128, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140
Other information	Yes	Other information - (D, E, F)	169, 171, 173
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
Partnership's EIN	Yes	A - Partnership's employer identification number	43
Partnership Name	Yes	B - Partnership Name, address, city, state and ZIP code	44
Partnership Address	Yes	B - Partnership Name, address, city, state and ZIP code	45
Partnership City	Yes	B - Partnership Name, address, city, state and ZIP code	46
Partnership State	Yes	B - Partnership Name, address, city, state and ZIP code	47
Partnership Zip	Yes	B - Partnership Name, address, city, state and ZIP code	48
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	53
Partner's Name	Default	F - Partner's name, address, city, state and ZIP code	54
Partner's Address	Default	F - Partner's name, address, city, state and ZIP code	55
Partner's City, State, Zip	Default	F - Partner's name, address, city, state and ZIP code	56
Type of Partner (General)	Yes	G - General partner or LLC member-manager	57
Type of Partner (Limited)	Yes	G - Limited partner or other LLC member	58
Partner Entity Type (Domestic)	Yes	H - Domestic partner	59
Partner Entity Type (Foreign)	Yes	H- Foreign partner	60
What type of Entity is partner?	Yes	I - What type of Entity is partner?	61
Partner's Profit % (Beginning)	Yes	J - Partner's share of Profit % (Beginning)	62
Partner's Profit % (Ending)	Yes	J - Partner's share of Profit % (Ending)	63
Partner's Loss % (Beginning)	Yes	J - Partner's share of Loss % (Beginning)	64
Partner's Loss % (Ending)	Yes	J - Partner's share of Loss % (Ending)	65
Partner's Capital % (Beginning)	Yes	J - Partner's share of Capital % (Beginning)	66
Partner's Capital % (Ending)	Yes	J - Partner's share of Capital % (Ending)	67
Partner's share of Liabilities (Nonrecourse)	Yes	K - Partner's share of Liabilities at year end (Nonrecourse)	68
Partner's share of Liabilities (Qualified Non-Rec.)	Yes	K - Partner's share of Liabilities at year end (Qualified Nonrecourse financing)	69
Partner's share of Liabilities (Recourse)	Yes	K - Partner's share of Liabilities at year end (Recourse)	70
Beginning Capital Account	Yes	L - Partner's capital account analysis: Beginning Capital Account	71
Capital Contributed	Yes	L - Partner's capital account analysis: Capital Contributed during the year	72
Current Year Increase	Yes	L - Partner's capital account analysis: Current Year Increase (decrease)	73
Withdrawals & Distributions	Yes	L - Partner's capital account analysis: Withdrawals & Distributions	74
Ending Capital Account	Yes	L - Partner's capital account analysis: Ending Capital Account	75
Tax Basis	Yes	L - Tax Basis	76
GAAP	Yes	L - GAAP	77
Section 704(b)	Yes	L - Section 704(b) book	78
Other	Yes	L - Other	79
Explain	Yes	L- Explain	80
Ordinary Business Income or Loss	Yes	1 - Ordinary Business Income (loss)	87
Other Net Rental Real Estate Inc. or Loss	Yes	2 - Net Rental Real Estate Income (loss)	89
Other Net Rental Income or Loss	Yes	3 - Other Net Rental Income (loss)	91
Guaranteed Payments	Yes	4 - Guaranteed Payments	93
Interest Income	Yes	5 - Interest Income	95
Ordinary Dividends	Yes	6a - Ordinary Dividends	97
Qualified Dividends	Yes	6b - Qualified Dividends	99

Name	Import	Form in Tax - IRS K-1 1065 And Field Names in Tax	Field Number in Tax
Royalties	Yes	7 - Royalties	101
Net Short Term Capital Gain or Loss	Yes	8 - Net Short Term Capital Gain (loss)	103
Net Long Term Capital Gain or Loss	Yes	9a - Net Long Term Capital Gain (loss)	105
Collectible (28%) Gain or Loss	Yes	9b - Collectibles (28%) Gain (loss)	107
Unrecaptured Section 1250 Gain	Yes	9c - Unrecaptured Section 1250 Gain	108
Net Section 1231 Gain or Loss	Yes	10 - Net Section 1231 Gain (loss)	109
Other income (loss)	Yes	11 - Other income (loss) - (A, C, F)	111, 113, 118
Other deductions	Yes	13 - Other deductions - (A, H, J, V, W)	125, 126, 130, 150, 153
Self-employment earnings (loss)	Yes	14 - Self-employment earnings (loss) - (B)	154
Credits	Yes	15 - Credits - (A/B, C/D, E, F, G, H, I, J, K, L, M, N, P)	155, 156, 157, 160, 163, 164, 165, 166, 167, 168, 169, 170, 171, 175
Foreign transactions	Yes	16 - Foreign transactions - (B, D/E/F, I/J/K, L, M, N)	180, 181, 190, 192, 193
Alternative min tax (AMT) items	Yes	17 - Alternative min tax (AMT) items - (A, B, C)	195, 197, 199
Tax-exempt income and nondeductible expenses	Yes	18 - Tax-exempt income and nondeductible expenses - (B, C)	233, 234
Other information	Yes	20 - Other information - (A, B, D, F, G, I, O, P)	235, 237, 239, 244, 245, 258, 262, 263
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
Shareholder's ID	Default	Shareholder's identifying number	51
Shareholder's Name	Default	Shareholder's name, address, city, state and ZIP code	52
Shareholder's Address	Default	Shareholder's name, address, city, state and ZIP code	53
Shareholder's City, State, Zip Code	Default	Shareholder's name, address, city, state and ZIP code	54
Corporation's EIN	Yes	Corporation's employee identification number	42
Corporation's Name	Yes	Corporation's name, address, city, state and ZIP code	43
Corporation's Address	Yes	Corporation's name, address, city, state and ZIP code	44
Corporation's City	Yes	Corporation's name, address, city, state and ZIP code	45
Corporation's State	Yes	Corporation's name, address, city, state and ZIP code	46
Corporation's Zip Code	Yes	Corporation's name, address, city, state and ZIP code	47
Shareholder's percentage of stock ownership	Yes	Shareholder's percentage of stock ownership for tax year	55
Ordinary Business Income or Loss	Yes	Ordinary Business Income (loss)	62
Net Rental Estate Inc or Loss	Yes	Net Rental Estate Inc (loss)	64
Other Net Rental Income or Loss	Yes	Other Net Rental Income (loss)	66
Interest Income	Yes	Interest Income	68
Ordinary Dividends	Yes	Ordinary Dividends	70
Qualified Dividends	Yes	Qualified Dividends	72
Royalties	Yes	Royalties	74
Net Short Term Capital Gain or Loss	Yes	Net Short Term Capital Gain (loss)	76
Net Long Term Capital Gain or Loss	Yes	Net Long Term Capital Gain (loss)	78
Collectible (28%) Gain or Loss	Yes	Collectible (28%) Gain (loss)	80
Unrecaptured Section 1250 Gain	Yes	Unrecaptured Section 1250 Gain	81
Net Section 1231 Gain or Loss	Yes	Net Section 1231 Gain (loss)	82
Other income (loss)	Yes	Other income (loss) - A, C, E	84, 86, 89
Other deductions	Yes	Other deductions - (A, H, J, R, S)	100, 101, 105, 125, 128
Credits	Yes	Credits - (A/B, C/D, E, F, G, H, I, J, K, L, M, N, P)	129, 130, 131, 134, 137, 138, 139, 140, 141, 142, 143, 144, 149
Foreign transactions	Yes	Foreign transactions - (B, D/E/F, I/J/K, L, M, N)	154, 155, 156, 157, 158, 159
Alternative minimum tax (AMT) items	Yes	Alternative minimum tax (AMT) items - (A, B, C)	170, 172, 174
Items affecting shareholder basis	Yes	Items affecting shareholder basis - (B, C)	206, 207
Other Information	Yes	Other Information - (A, B, C, E, F, H, M, N, T)	208, 210, 212, 217, 218, 231, 235, 236, 263
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
Payer's federal identification	Yes	Federal ID	47
Payer's name	Yes	Payer's - Name	30
Payer's address	Yes	Payer's - Street Address	31
Payer's city	Yes	Payer's - City	32
Payer's state	Yes	Payer's - State	33
Payer's zip	Yes	Payer's - ZIP code	34
Payer's telephone number	Yes	Payer's - Phone Number	35
Payer's RTN	Yes	Payer's RTN	46
Account number	Yes	Account number	45
Recipient's identification number	Yes	Recipient's - ID number	62
Recipient's name	Yes	Recipient's - Name	55
Recipient's street address	Yes	Recipient's - Street Address	56
Recipient's city	Yes	Recipient's - City	57
Recipient's state	Yes	Recipient's - State	58
Recipient's zip	Yes	Recipient's - ZIP code	59
1099-INT		Fields below appear in Interest Income section of CN-1 Sheet 1	
1 Interest income	Yes	Ordinary Interest	71
2 Early withdrawal penalty	Yes	Early Withdrawal Penalty	84
3 Interest on US savings bonds and obligations	Yes	U.S. Bonds and Obligations	72
4 Federal income tax withheld	Yes	Federal withholding	82
5 Investment expenses	Yes	Investment expenses	83
6 Foreign tax paid	Yes	Foreign Taxes paid or Accrued - U.S. Amount	107
7 Foreign country or US possession	Yes	Foreign Taxes paid or Accrued - Name of Foreign Country Imposing Tax	102
8 Tax exempt interest	Yes	Tax-Exempt Interest	80
9 Specified private activity bond interest	Yes	Private Activity Bonds	81
13 State	Yes	State	40
15 State tax withheld	Yes	State Withholding	95
1099-OID		Fields below appear in Interest Income section of CN-1 Sheet 2	
1 Original issue discount	Yes	Ordinary Interest	71
4 Federal income tax withheld	Yes	Federal withholding	82
6 Original issue discount on U.S. treasury ob.	Yes	U.S. Bonds and Obligations	72
7 Investment expenses	Yes	Investment expenses	83
1099-DIV		Fields below appear in Dividend Income section of CN-2	
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	Foreign Taxes paid or Accrued - U.S. Amount	67
7 Foreign country or US possession	Yes	Foreign Taxes paid or Accrued - Name of Foreign Country Imposing Tax	62
10 Exempt-interest dividends	Yes	1099-DIV - Box 10 Tax Exempt Dividends	46
11 Specified private activity bond interest dividends	Yes	1099-DIV - Box 11 Private Activity Bond Dividends	47
14 State income tax withheld	Yes	State Withholding	48
1099-MISC		Fields below appear in Miscellaneous Income section of CN-3	
3 Other income	Yes	Other income	40
4 Federal income tax withheld	Yes	Federal Income Tax Withheld	42

Name	Import	Form in Tax - Form D-1 And Field Names in Tax	Field Number in Tax
Description	Yes	Description	30, 39, 48, 57, 66, 75, 84, 93
Shares	Yes	Description	30, 39, 48, 57, 66, 75, 84, 93
1099-B code	Yes	1099-B Code	35, 44, 53, 62, 71, 80, 89, 98
Date acquired	Yes	Date Acquired	102, 110, 118, 126, 134, 142, 150, 158
Date sold	Yes	Date Sold	103, 111, 119, 127, 135, 143, 151, 159
Sales price	Yes	Gross Sales Price	104, 112, 120, 128, 136, 144, 152, 160
Cost or other basis	Yes	Cost or Other Basis	105, 113, 121, 129, 137, 145, 153, 161
Form 8949 Code - Code 1	Yes	Form 8949 Code (See Guide)	176, 183, 190, 197, 204, 211, 218, 225
Adjustment - Override	Yes	Adjustment - Override	175, 182, 189, 196, 203, 210, 217, 224