

ProSystem *fx*® Scan
with AutoFlow Technology™

AutoFlow Forms & Fields Extracted

Name	Import	Form in Tax - IRS 1099-DIV And Field Names in Tax	Field Number in Tax
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 no.	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	59
Total Ordinary Dividends	Yes	1a Total ordinary dividends	70
Qualified Dividends	Yes	1b Qualified dividends	71
Total Capital Gains Distr	Yes	2a Total capital gain distr.	72
Unrecap. Sec 1250 Gain	Yes	2b Unrecap. Sec. 1250 gain	73
Section 1202 Gain	Yes	2c Section 1202 gain	74
Collectibles (28%) Gain	Yes	2d Collectibles (28%) gain	75
Nondividend Distributions	Yes	3 Nondividend distributions	76
Federal Income Tax Withheld	Yes	4 Federal income tax withheld	77
Investment Expenses	Yes	5 Investment expenses	78
Foreign Tax Paid	Yes	6 Foreign tax paid	79
Foreign Country or US Possession	Yes	7 Foreign country or U.S. possession	80
Exempt-Interest Dividends	Yes	10 Exempt-interest dividends	83
Specified Private Activity Bond Interest Dividends	Yes	11 Specified private activity bond interest div.	84
State	Yes	12 State	85
State Identification Number	Yes	13 State identification no.	86
State Income Tax Withheld	Yes	14 State tax withheld	87

Name	Import	Form in Tax - IRS 1099-INT And Field Names in Tax	Field Number in Tax
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 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
Recipient's Identification Number	Default	Recipient's identification number	50
Account Number	Yes	Account number	59
Interest Income	Yes	1 Interest income	71
Early Withdrawal Penalty	Yes	2 Early withdrawal penalty	72
Interest on US Savings Bonds and Obligations	Yes	3 Interest on U.S. Savings bonds and Treas. Obligations	73
Federal Income Tax Withheld	Yes	4 Federal income tax withheld	74
Investment Expenses	Yes	5 Investment expenses	75
Foreign Tax Paid	Yes	6 Foreign tax paid	77
Foreign Country or US Possession	Yes	7 Foreign country or U.S. possession	78
Tax Exempt Interest	Yes	8 Tax-exempt interest	80
Specified Private Activity Bond Interest	Yes	9 Specified private activity bond interest	81
Market Discount	Yes	10 Market discount	82
Bond Premium	Yes	11 Bond premium	83
Bond Premium on tax-exempt bond	Yes	13 Bond premium on tax- exempt bond	84
Tax-Exempt Bond CUSIP No.	Yes	14 Tax-exempt bond CUSIP no.	86
State	Yes	15 State	87
State Identification Number	Yes	16 State ID no.	88
State Income Tax Withheld	Yes	17 State tax withheld	89

Name	Import	Form in Tax - IRS 1099-R And Field Names in Tax	Field Number in Tax
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 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, foreign country code, and prov/st/county	49
Recipient's Street Address	Default	RECIPIENT'S name, address, city, state, ZIP or postal code, foreign country code, and prov/st/county	50
Recipient's City	Default	RECIPIENT'S name, address, city, state, ZIP or postal code, foreign country code, and prov/st/county	51
Recipient's State	Default	RECIPIENT'S name, address, city, state, ZIP or postal code, foreign country code, and prov/st/county	52
Recipient's ZIP	Default	RECIPIENT'S name, address, city, state, ZIP or postal code, foreign country code, and prov/st/county	53
Account Number	Yes	Account number	84
Gross Distribution	Yes	1 Gross distribution	56
Taxable Amount	Yes	2a Taxable amount	57
Capital Gain (Included in Box 2a)	Yes	3 Capital gain (included in box 2a)	60
Federal Income Tax Withheld	Yes	4 Federal income tax withheld	61
Employer Contributions, etc.	Yes	5 Employer contributions/designated Roth contribution or insurance premiums	62
Net Unrealized Appreciation	Yes	6 Net unrealized appreciation in employer's securities	63
Distribution Code(s)	Yes	7 Distribution code(s)	64
IRA/SEP/SIMPLE	Yes	IRA/SEP/SIMPLE	65
Other	Yes	8 Other	66
Other Percent	Yes	Blank	67
Your Percentage of Total Dist	Yes	9a Your percentage of total distribution	68
Total Employee Contributions	Yes	9b Total employee contributions	69
State Tax Withheld	Yes	12 State tax withheld	72
State	Yes	13 State	73
Payer's State Number	Yes	Payer's state no.	90
State Distribution	Yes	14 State distribution	74
Local Tax Withheld	Yes	15 Local tax withheld	78
Name of Locality	Yes	16 Name of locality	79
Local Distribution	Yes	17 Local distribution	80

Name	Import	Form in Tax - IRS 2439 And Field Names in Tax	Field Number in Tax
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	SHAREHOLDER'S identifying number	47
Recipient's Name	Default	SHAREHOLDER'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
Total Undistributed Long-Term Capital Gains	Yes	1a Total undistributed long-term capital gains	60
Unrecaptured Section 1250 Gain	Yes	1b Unrecaptured section 1250 gain	61
Tax paid	Yes	2 Tax paid by the RIC or REIT on the box 1a gains	64

Name	Import	Form in Tax - IRS K-1 1041 And Field Names in Tax	Field Number in Tax
Estate's or Trust's EIN	Yes	A Estate's or trust's employer identification number	41
Estate's or Trust Name	Yes	B Estate's or trust's name	42
Beneficiary Identifying Number	Default	F Beneficiary's identifying number	53
Beneficiary Name	Default	F Beneficiary's name, address, city, state and ZIP code	54
Beneficiary Address	Default	F Beneficiary's name, address, city, state and ZIP code	55
Beneficiary City, State, Zip	Default	F Beneficiary's name, address, city, state and ZIP code	56
Final K-1	Yes	X if 100% disp	34
Fiduciary's Name	Yes	C Fiduciary's name, address, city, state and ZIP code	43
Fiduciary's Address	Yes	C Fiduciary's name, address, city, state and ZIP code	44
Fiduciary's City	Yes	C Fiduciary's name, address, city, state and ZIP code	45
Fiduciary's State	Yes	C Fiduciary's name, address, city, state and ZIP code	46
Fiduciary's Zip	Yes	C Fiduciary's name, address, city, state and ZIP code	47
Form 1041-T Filed	Yes	D Check if Form 1041-T was filed	50
Form 1041-T Filing Date	Yes	D Enter the date it was filed	51
Final Form 1041 for Estate or Trust	Yes	E Check if this is the Final 1041 for the estate or trust	52
Domestic Beneficiary	Yes	H Domestic beneficiary	57
Foreign Beneficiary	Yes	H Foreign beneficiary	58
Interest Income	Yes	1 Interest income	66
Ordinary Dividends	Yes	2a Ordinary dividends	68
Qualified Dividends	Yes	2b Qualified dividends	70
Net Short-Term Capital Gain or Loss	Yes	3 Net short-term capital gains	72
Net Long-Term Capital Gain or Loss	Yes	4a Net long-term capital gains	74
28% Rate Gain	Yes	4b 28% rate gain	76
Unrecaptured Section 1250 Gain	Yes	4c Unrecaptured section 1250 gain	77
Other Portfolio and Nonbusiness Income	Yes	5 Other portfolio income and nonbusiness income	78
Ordinary Business Income	Yes	6 Ordinary business income	80
Net Rental Real Estate Income	Yes	7 Net rental real estate income	82
Other Rental Income	Yes	8 Other rental income	84
Directly Apportioned Deductions	Yes	9 Directly apportioned deductions: (A,B,C)	86, 88, 90
Estate Tax Deduction	Yes	10 Estate tax deduction	92
Final Year Deductions	Yes	11 Final year deductions: (A, B, C)	93, 95, 97
Alternative Minimum Tax Adjustment	Yes	12 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	13 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	14 Other information: (D, E, F, H)	169, 171, 173, 225

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's name, address, city, state and ZIP code	44
Partnership Address	Yes	B Partnership's name, address, city, state and ZIP code	45
Partnership City	Yes	B Partnership's name, address, city, state and ZIP code	46
Partnership State	Yes	B Partnership's name, address, city, state and ZIP code	47
Partnership Zip	Yes	B Partnership's name, address, city, state and ZIP code	48
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
Final K-1	Yes	X if 100% disp	36
X If Publicly Traded Partnership	Yes	D Check if this is a publicly traded partnership (PTP)	52
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
Other (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

Name	Import	Form in Tax - IRS K-1 1065 And Field Names in Tax	Field Number in Tax
Qualified Dividends	Yes	6b Qualified dividends	99
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	Yes	11 Other income (loss): (A, C, F)	111, 113, 118
Other Deduction	Yes	13 Other deductions: (A, H, J, V, W)	125, 126, 130, 150, 153
Self-Employment Earnings	Yes	14 Self-employment earnings (loss): (B)	154
Credit	Yes	15 Credits: (A/B, C/D, E, F, G, H, I, J, K, L, M, N, O, P)	155, 156, 157, 160, 163, 164, 165, 166, 167, 168, 169, 170, 171, 175
Foreign transaction	Yes	16 Foreign transactions: (B, D/E/F, I/J/K, L, M, N)	180, 181, 190, 191, 192, 193
Alternative Min Tax (AMT) Item	Yes	17 Alternative minimum tax (AMT) items: (A, B, C)	195, 197, 199
Tax-Exempt Income and Nondeductible Expense	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

Name	Import	Form in Tax - IRS K-1 1120S And Field Names in Tax	Field Number in Tax
Corporation's EIN	Yes	A Corporation's employer identification number	42
Corporation Name	Yes	B Corporation's name, address, city, state and ZIP code	43
Corporation Address	Yes	B Corporation's name, address, city, state and ZIP code	44
Corporation City	Yes	B Corporation's name, address, city, state and ZIP code	45
Corporation State	Yes	B Corporation's name, address, city, state and ZIP code	46
Corporation Zip	Yes	B Corporation's name, address, city, state and ZIP code	47
Shareholder's Identifying Number	Default	D Shareholder's identifying number	51
Shareholder's Name	Default	E Shareholder's name, address, city, state and ZIP code	52
Shareholder's Address	Default	E Shareholder's name, address, city, state and ZIP code	53
Shareholder's City, State, Zip	Default	E Shareholder's name, address, city, state and ZIP code	54
Final K-1	Yes	X if 100% disposition	35
Shareholder's Percentage of Stock Ownership	Yes	F Shareholder's percentage of stock ownership for tax year	55
Ordinary Business Income or Loss	Yes	1 Ordinary business income (loss)	62
Net Rental Estate Inc. or Loss	Yes	2 Net rental real estate income (loss)	64
Other Net Rental Income or Loss	Yes	3 Other net rental income (loss)	66
Interest Income	Yes	4 Interest income	68
Ordinary Dividends	Yes	5a Ordinary dividends	70
Qualified Dividends	Yes	5b Qualified dividends	72
Royalties	Yes	6 Royalties	74
Net Short-Term Capital Gain or Loss	Yes	7 Net short-term capital gain (loss)	76
Net Long-Term Capital Gain or Loss	Yes	8a Net long-term capital gain (loss)	78
Collectible (28%) Gain or Loss	Yes	8b Collectibles (28%) gain (loss)	80
Unrecaptured Section 1250 Gain	Yes	8c Unrecaptured section 1250 gain	81
Net Section 1231 Gain or Loss	Yes	9 Net section 1231 gain (loss)	82
Other Income	Yes	10 Other income (loss): A, C, E	84, 86, 89
Other Deduction	Yes	12 Other deductions: (A, H, J, R, S)	100, 101, 105, 125, 128
Credit	Yes	13 Credits: (A/B, C/D, E, F, G, H, I, J, K, L, M, N, O, P)	129, 130, 131, 134, 137, 138, 139, 140, 141, 142, 143, 144, 145, 149
Foreign Transaction	Yes	14 Foreign transactions: (B, D/E/F, I/J/K, L, M, N)	154, 155, 156, 157, 158, 159
Alternative Min Tax (AMT) Item	Yes	15 Alternative minimum tax (AMT) items: (A, B, C)	170, 172, 174
Items Affecting Shareholder Basis	Yes	16 Items affecting shareholder basis: (B, C)	206, 207
Other Information	Yes	17 Other Information: (A, B, C, E, F, H, M, N, T, U)	208, 210, 212, 217, 218, 231, 235, 236, 263, 244

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/Postal 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	Default	Recipient's ID Number	62
Recipient's Name	Default	Recipient's Name	55
Recipient's Street Address	Default	Recipient's Street Address	56
Recipient's City	Default	Recipient's City	57
Recipient's State	Default	Recipient's State	58
Recipient's ZIP	Default	Recipient's ZIP/Postal Code	59
1099-INT		Fields below appear in Interest Income section of CN-1 Sheet 1	
Interest Income	Yes	Ordinary Interest	71
Early Withdrawal Penalty	Yes	Early Withdrawal Penalty	84
Interest on US Savings Bonds and Obligations	Yes	U.S. Bonds and Obligations	72
Federal Income Tax Withheld	Yes	Federal Withholding	82
Investment Expenses	Yes	Investment Expenses	83
Foreign Tax Paid	Yes	U.S. Amount	107
Foreign Country or US Possession	Yes	Name of Foreign Country Imposing Tax	102
Tax Exempt Interest	Yes	Tax-Exempt Interest	80
Specified Private Activity Bond Interest	Yes	Private Activity Bonds	81
State	Yes	State	40
State Tax Withheld	Yes	State Withholding	95
1099-OID		Fields below appear in Interest Income section of CN-1 Sheet 2	
Original Issue Discount	Yes	Ordinary Interest	71
Federal Income Tax Withheld	Yes	Federal Withholding	82
Original Issue Discount on U.S. Treasury Ob.	Yes	U.S. Bonds and Obligations	72
Investment Expenses	Yes	Investment Expenses	83
1099-DIV		Fields below appear in Dividend Income section of CN-2	

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	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 help)	176, 183, 190, 197, 204, 211, 218, 225
Adjustment - Override	Yes	Adjustment - Override	175, 182, 189, 196, 203, 210, 217, 224