

ATX™ Learning Portal

Entering Return Data

To begin entering data in a return, start on the Main Information Sheet. Use this form to enter the taxpayer's basic data., such as names, SSNs, address, and birthdates. The information entered on this form flows to various forms throughout the rest of the return.

Fields with a blue background are direct entry fields, while a white background indicates a calculated field. ATX automatically enters the information on calculated fields from data on other forms, or calculations performed in the background.

A yellow background indicates the current active field.

To begin entering data:

1. Place your cursor in the **First Name** field and begin typing the taxpayer's name.
2. Press **Enter** or **Tab** to move to the next field.

Main Information Worksheet				
This return is currently for: 1040. If you would like to change forms, please go to Add Forms and manually choose a Signature Form to replace the 1040.				
Demographic Information (1040)				
Filing information for the calendar year 2024 or other tax year beginning <input type="text"/> , and ending <input type="text"/>				
Taxpayer Name and Identification Number				
First Name	M.I.	Last Name	Suffix	Social Security Number
ROBERT	<input type="text"/>	STEVENS	<input type="text"/>	<input type="text"/>
Spouse Name				
First Name	M.I.	Last Name	Suffix	Social Security Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Continue entering the information in the appropriate fields, including the SSN, spouse information if applicable, and address.

Taxpayer Name and Identification Number				
First Name	M.I.	Last Name	Suffix	Social Security Number
ROBERT		STEVENS		
Spouse Name				
First Name	M.I.	Last Name	Suffix	Social Security Number
ROBERTA		STEVENS		
Address				
In Care Of (if applicable)				
First Name	M.I.	Last Name	Suffix	
c/o				
In Care Of Social Security Number				
Street Address			Apt, Suite or Unit	Unit Type
123 Main St				
P.O. Box (if applicable)		Private Mailbox Number		
P.O. Box		PMB		
ZIP Code	City or town		State	
30144	Kennesaw		GA	
Foreign Province		Foreign Country		Foreign Zip
Foreign Phone Number				

i When pressing tab to move through the fields, ATX asks for the zip code first, then automatically adds the city and state for you.

4. Next, select the checkbox to indicate the taxpayer's filing status.

Filing Status				
<input type="checkbox"/>	Single			
<input type="checkbox"/>	Married Filing Jointly (even if only one had income)			
<input type="checkbox"/>	Married Filing Separately (MFS)			
	Enter spouse's full name and SSN above.			
<input type="checkbox"/>	Check if spouse is a nonresident alien, does not have and is not required to have an SSN or ITIN.			
<input type="checkbox"/>	Check if filing status is married filing separately and lived apart for all of 2024.			
<input type="checkbox"/>	Check if your spouse itemizes on a separate return or you were a dual-status alien.			
<input checked="" type="checkbox"/>	Head of Household (HOH)			
	If the qualifying person is a child but not your dependent, enter this child's name here.			
	First Name	M.I.	Last Name	Suffix
<input type="checkbox"/>	Qualifying Surviving Spouse (QSS)			
	Enter year spouse died: _____			
	If you have a child who qualifies you to file with the qualifying surviving spouse status and the child is not claimed as your dependent, enter the child's name above.			
<input type="checkbox"/>	If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name.			

Filer's Information

1. In the Filer's Information section, type the taxpayer and spouse's birthdates and phone number.
2. Check any boxes that apply to indicate if the taxpayer or spouse is over age 65, deaf, permanently and totally disabled, or blind.

Individual Filer Information				
	Taxpayer		Spouse	
Date of birth	6/16/1976			
Age	48			
Date of death				
Identity protection PIN (if applicable)				
Check which phone number to list as "Daytime phone number":				
Home Phone Number	<input checked="" type="checkbox"/>		Ext.	
Work Phone Number	<input type="checkbox"/>		Ext.	
Cell Phone Number	<input type="checkbox"/>			
Fax number	<input type="checkbox"/>			
Email Address				
Occupation				
Check if:				
Age 65 or older	<input type="checkbox"/>			<input type="checkbox"/>
Deaf	<input type="checkbox"/>			<input type="checkbox"/>
Disabled	<input type="checkbox"/>			<input type="checkbox"/>
Blind	<input type="checkbox"/>			<input type="checkbox"/>
If someone can claim you as a dependent, do not check the box	<input checked="" type="checkbox"/>			<input type="checkbox"/>

3. In the next section, type the date the taxpayer signs the return, and indicate whether a third-party designee is authorized.

Signature			
Date Signed			
Third Party Designee			
<input type="checkbox"/> Yes			
<input type="checkbox"/> If yes, check to use paid preparer as the 3rd party designee.			
<input checked="" type="checkbox"/> No			
Designee's First Name	M.I.	Last Name	Suffix
Phone number	Personal identification number (PIN)		

4. Next, complete the information regarding the taxpayer's identification verification, and type of proof used.

Electronic Filing Information		
Additional information is being requested this filing season in an effort to combat stolen-identity tax fraud. Please provide the requested information from the driver's license or state-issued identification card. Providing the information could help process returns faster.		
	Taxpayer	Spouse
ID type	<input type="text"/>	<input type="text"/>
ID number	<input type="text"/>	<input type="text"/>
ID issuing state	<input type="text"/>	<input type="text"/>
ID issue date	<input type="text"/>	<input type="text"/>
ID expiration date	<input type="text"/>	<input type="text"/>
Check to indicate "lifetime" as ID expiration date	<input type="checkbox"/>	<input type="checkbox"/>
Check if:		
No driver's license/state ID exists	<input type="checkbox"/>	<input type="checkbox"/>
ID exists but not provided	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Once you complete this form, ATX displays the information in the correct fields on Form 1040.

Form	1040	Department of the Treasury—Internal Revenue Service	2024	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.
	For the year Jan. 1–Dec. 31, 2024, or other tax year beginning _____, 2024, ending _____, 20 _____				See separate instructions.
Your first name and middle initial ROBERT		Last name STEVENS		Your social security number <input type="text"/>	
If joint return, spouse's first name and middle initial		Last name		Spouse's social security number	
Home address (number and street). If you have a P.O. box, see instructions. 123 Main St			Apt. no.		Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. Kennesaw		State GA	ZIP code 30144		
Foreign country name		Foreign province/state/country		Foreign postal code	
Filing Status <input type="checkbox"/> Single <input checked="" type="checkbox"/> Head of household (HOH) <input type="checkbox"/> Married filing jointly (even if only one had income) <input type="checkbox"/> Married filing separately (MFS) <input type="checkbox"/> Qualifying surviving spouse (QSS) If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: _____ <input type="checkbox"/> If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required): _____					
Digital Assets At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services), or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
Standard Deduction Someone can claim: <input type="checkbox"/> You as a dependent <input type="checkbox"/> Your spouse as a dependent <input type="checkbox"/> Spouse itemizes on a separate return or you were a dual-status alien					
Age/Blindness You: <input type="checkbox"/> Were born before January 2, 1960 <input type="checkbox"/> Are blind Spouse: <input type="checkbox"/> Was born before January 2, 1960 <input type="checkbox"/> Is blind					

Entering Dependents

ATX calculates the number of dependents on Form 1040 from the Dependents worksheet.

1. Click the first box in the dependent section, and click **JumpTo**.

Dependents (see instructions):	(1) First name		(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	
	Last name				Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here <input type="checkbox"/>	<input type="text"/>	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>

2. Type the dependent information in the boxes.

Dependents (1040)															Totals									
1	First name	M.I.	Last name	Suffix	Dependent's social security number	Dependent's identity protection PIN (if applicable)	Dependent's relationship to you	* No. of months in home in 2024	Check if did not live with you due to div. or sep.	Dependent's date of birth	Check if US citizen or resident alien	Student age 19-23 or Disabled	Check if dependent has education expenses	Check to not claim dependent this year	Check if Child qualifies for EIC	Check if child was born and died in 2024 and no SSN	Check if Kidnapped Child see pub 596	Child Tax Credit	Credit for other dependents	Dependent's age	Enter '1' for children who lived with you	Enter '1' for children who did not live with you	Enter '1' for other dependents	
																				0	0	0		

3. ATX displays this information on Form 1040, page 1.

Dependents (see instructions):	(1) First name		(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	
	Last name				Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here <input type="checkbox"/>	CHILD	ONE		Son	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>			<input type="checkbox"/>	<input type="checkbox"/>

Color-Coding in Returns

ATX uses different colors to indicate types of entry fields. Review the chart below for information on the colors and what they represent.

Field Color	Description
Blue	An input field that will accept user entries. With very few exceptions, all information should be entered in blue fields.
Light Yellow	The currently active data entry field. When the cursor is active in a blue field, the field changes to light yellow.
White	A field that contains links or calculations referred to by the program. You will receive a warning message whenever you attempt to enter information directly in a white field.
Pink	A calculated field that you've overrode. To restore the original links and calculations of a pink field, select the field, and then click the Restore button.
Violet	Contains an estimated amount.
Green	Indicates a link to another field.

Navigating Forms

ATX provides multiple pages and worksheets on each form to allow detailed data entry. See below for quick ways to navigate and enter data, depending on the situation.

Navigating Through a Single Page

To navigate through a single page:

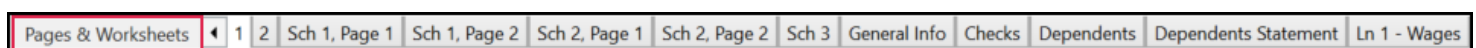
1. Press **Enter** or **Tab** to move from the current box to the next box.
2. To reverse direction, press **Shift+Tab**.

Navigation Bar

ATX displays a navigation bar below the active form, consisting of the Pages & Worksheets button and a series of tabs. ATX associates each tab with a numbered form page, schedule, worksheet or other page of the active form.

To navigate through the active form:

1. Click **Pages & Worksheets** to display a list of all worksheets for the active form.



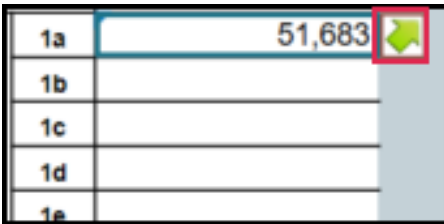
2. Click the worksheet you want to open in the list.

Jump To

On all forms, schedules and worksheets, ATX calculates values in white boxes from data typed elsewhere. JumpTo enables fast navigation to the forms, schedules or worksheets from which this data originates. Fields that allow you to Jump to another form or field display a green arrow next to the field.

To use JumpTo:

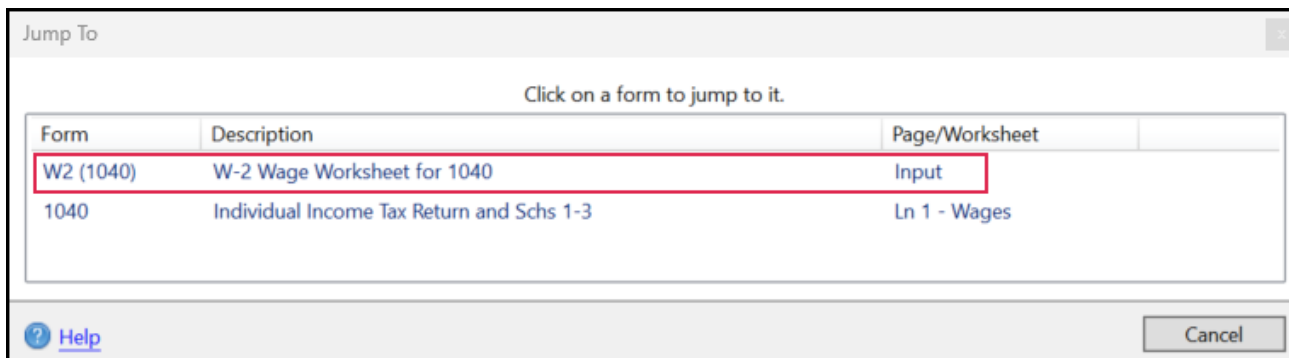
1. Click a calculated box and click the **JumpTo** icon.



A screenshot of a form with five rows labeled 1a through 1e. Row 1a contains the value '51,683' in a white box. To the right of this box is a green arrow icon pointing right, which is highlighted with a red square. The other rows (1b, 1c, 1d, 1e) are empty.

2. If there is only one source box, JumpTo navigates to the source box.

If ATX pulls information from multiple sources for the box, ATX displays the form options. Select the form, schedule or worksheet to which you want to navigate.



A screenshot of the 'Jump To' dialog box. The title bar says 'Jump To'. Below the title bar is the instruction 'Click on a form to jump to it.' There is a table with three columns: 'Form', 'Description', and 'Page/Worksheet'. The first row is highlighted with a red border and contains 'W2 (1040)', 'W-2 Wage Worksheet for 1040', and 'Input'. The second row contains '1040', 'Individual Income Tax Return and Schs 1-3', and 'Ln 1 - Wages'. At the bottom left is a 'Help' button with a question mark icon, and at the bottom right is a 'Cancel' button.

Form	Description	Page/Worksheet
W2 (1040)	W-2 Wage Worksheet for 1040	Input
1040	Individual Income Tax Return and Schs 1-3	Ln 1 - Wages

Keyboard Shortcuts

To help complete returns quickly, ATX offers shortcuts for certain tasks. The full list of shortcuts is inside [ATX Help](#).

Some of the commonly used shortcuts include:

- **F1:** Open Program Help
- **Ctrl+N:** Open the Select Forms window
- **Ctrl+O:** Open a selected return

In an Open Return:

- **F3:** Open IRS instructions
- **F4:** Mark field as estimate
- **F6:** JumpTo
- **F7:** Cross Reference
- **Ctrl+E:** Check Return
- **Ctrl+P:** Print the return
- **Ctrl+S:** Save the return
- **Ctrl+T:** Insert Note

In E-file Manager:

- **Ctrl+T:** Transmit Returns
- **Ctrl+R:** Receive Acknowledgements