<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>In ProSeries, complete:</th>
<th>Common Forms?</th>
<th>In Forms, Type In:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amendment</td>
<td>Amending a Federal Tax Return</td>
<td>Form 1040X</td>
<td></td>
<td>&quot;X&quot;</td>
</tr>
<tr>
<td>Capital Loss Carryover</td>
<td>Capital Loss Carryover</td>
<td>Capital Loss Carryover Worksheet</td>
<td></td>
<td>&quot;CLO&quot;</td>
</tr>
<tr>
<td>Car/Truck Expenses (Self-Employed)</td>
<td>Vehicle Expenses for Self-Employed</td>
<td>Car and Truck Exp Wks, Link to Sched C</td>
<td></td>
<td>&quot;Car&quot;</td>
</tr>
<tr>
<td>Cash Income from Self-Employment (ex: Tips)</td>
<td>Gross Receipts not reported</td>
<td>Sched C – Part 1, Line 1a</td>
<td></td>
<td>&quot;C&quot;</td>
</tr>
<tr>
<td>Charitable Contributions</td>
<td>Gifts to Charity / Donations</td>
<td>Sched A – Gifts to Charity</td>
<td>X</td>
<td>&quot;Contrib&quot;</td>
</tr>
<tr>
<td>Dependent Care Expenses</td>
<td>Dependent Care Expenses</td>
<td>Federal Info Wks, Part III will generate Form 2441</td>
<td>X</td>
<td>&quot;2441&quot;</td>
</tr>
<tr>
<td>Disallowed (EIC/CTC/AOTC/HOH)</td>
<td>Information to Claim Certain Credits After Disallowance</td>
<td>Form 8862</td>
<td></td>
<td>&quot;8862&quot;</td>
</tr>
<tr>
<td>Early Retirement Distribution Exemption</td>
<td>Penalty Exemption for Early Distribution from a Retirement Plan</td>
<td>Form 5329 – S/T</td>
<td></td>
<td>&quot;5329&quot;</td>
</tr>
<tr>
<td>Education Expenses / Costs for Dependent</td>
<td>Student Expenses</td>
<td>Federal Info Wks, Part III will generate a Dependent Student Worksheet</td>
<td></td>
<td>&quot;SI&quot;</td>
</tr>
<tr>
<td>Education Expenses / Costs for Taxpayer or Spouse</td>
<td>Student Expenses</td>
<td>Federal Info Wks, Part X will generate a T/S Student Worksheet</td>
<td></td>
<td>&quot;SI&quot;</td>
</tr>
<tr>
<td>Educator Expenses</td>
<td>Teacher (Educator) Expenses</td>
<td>Educator Expenses</td>
<td></td>
<td>&quot;EE&quot;</td>
</tr>
<tr>
<td>Estimated Tax Payments</td>
<td>Estimated &amp; Over- Payments</td>
<td>Tax Payments Worksheet</td>
<td></td>
<td>&quot;Pay&quot;</td>
</tr>
<tr>
<td>Form 1095-A</td>
<td>Health Insurance Marketplace Statement</td>
<td>Form 1095-A (this will populate into Form 8962)</td>
<td></td>
<td>&quot;1095A&quot;</td>
</tr>
<tr>
<td>Form 1098</td>
<td>Mortgage Interest</td>
<td>Form 1098</td>
<td></td>
<td>&quot;1098&quot;</td>
</tr>
<tr>
<td>Form 1098-E</td>
<td>Student Loan Interest</td>
<td>Student Loan Worksheet</td>
<td></td>
<td>&quot;Student&quot;</td>
</tr>
<tr>
<td>Form 1098-T</td>
<td>Tuition Statement (Common EINs listed in Mini Manual)</td>
<td>1098-T Worksheet</td>
<td></td>
<td>&quot;98T&quot;</td>
</tr>
</tbody>
</table>

For more detailed, step-by-step instructions on how to enter the form into ProSeries, please refer to the ProSeries Tax Manual in your computer's Resource Folder, or use the printed copies available at your tax site.
### “Where Do I Enter?” Cheat Sheet

#### Form 1099-B
- **Description:** Capital Gains/Losses
- **In ProSeries, complete:** Schedule D
- **Common Forms?** X
- **In Forms, Type In:** "D"

#### Form 1099-C
- **Description:** Cancelled Debt
- **In ProSeries, complete:** Form 1099-C
- **Common Forms?** X
- **In Forms, Type In:** "1099C"

#### Form 1099-DIV
- **Description:** Dividends
- **In ProSeries, complete:** Schedule B – Part II
- **Common Forms?** X
- **In Forms, Type In:** "B"

#### Form 1099-G
- **Description:** Unemployment Comp for IL *(EIN: 36-3042127)* or Taxable IL State Refund *(EIN: 37-6002057)*
- **In ProSeries, complete:** 1099-G Worksheet
- **Common Forms?** X
- **In Forms, Type In:** "99G"

#### Form 1099-INT
- **Description:** Interest Income
- **In ProSeries, complete:** Schedule B – Part I
- **Common Forms?** X
- **In Forms, Type In:** "B"

#### Form 1099-K
- **Description:** Merchant Card & Third-Party Payments
- **In ProSeries, complete:** 1099-K Worksheet
- **Common Forms?** "99K"

#### Form 1099-Misc
- **Description:** Miscellaneous Income
- **In ProSeries, complete:** 1099-MISC Worksheet
- **Common Forms?** X
- **In Forms, Type In:** "99M"

#### Form 1099-R
- **Description:** Sale of Home
- **In ProSeries, complete:** Home Sale Worksheet
- **Common Forms?** "Sale"

#### Form 1099-SA (HSA Cert Required)
- **Description:** Distribution from an HSA
- **In ProSeries, complete:** 1099-SA Worksheet
- **Common Forms?** "SA"

#### Form 5498-SA (HSA Cert Required)
- **Description:** HSA Contributions
- **In ProSeries, complete:** Form 8889 -Taxpayer/Spouse
- **Common Forms?** "8889"

#### Form RRB-1099
- **Description:** Railroad Retirement Benefits
- **In ProSeries, complete:** 1099-R Wks & Social Sec
- **Common Forms?** X
- **In Forms, Type In:** "99R" & "Soc"

#### Form SSA-1099
- **Description:** Social Security Benefits
- **In ProSeries, complete:** Social Sec Worksheet
- **Common Forms?** X
- **In Forms, Type In:** "Soc"

#### Form W-2*
- **Description:** Wage Income
- **In ProSeries, complete:** W-2 Worksheet
- **Common Forms?** X
- **In Forms, Type In:** "W2"

#### Form W-2G
- **Description:** Gambling Winnings
- **In ProSeries, complete:** W-2G Worksheet
- **Common Forms?** "W2G"

#### Itemized Deductions
- **Description:**
  - Charitable Contributions
  - Gambling Losses (up to the amount of reported gambling winnings)
  - Property Taxes (Home Mortgage Interest)
  - Medical and Dental Expenses (if in excess of 10% of the taxpayer’s AGI)
  - Miscellaneous Itemized Deductions
- **In ProSeries, complete:** Schedule A
- **Common Forms?** X
- **In Forms, Type In:** "A"

#### Split Refund or Purchase Savings Bonds
- **Description:** Allocation of Refund to more than one account or purchase Savings Bonds
- **In ProSeries, complete:** Form 8888
- **Common Forms?** X
- **In Forms, Type In:** "8888"

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*For W-2, note that Tips (cash income) should be entered into Schedule C. If there is a Code W in Box 12, an HSA Cert is required to prepare the return.*

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