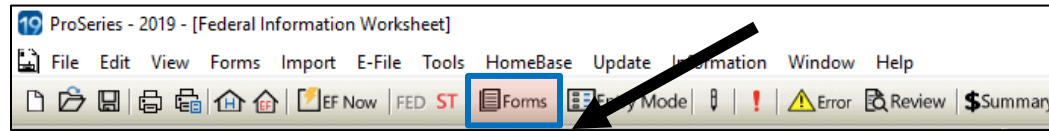


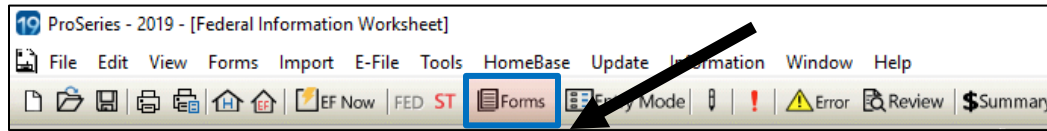
## “Where Do I Enter?” Cheat Sheet



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

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



Item	Description	In ProSeries, complete:	Common Forms?	In Forms, Type In:
Form 1099-B	Capital Gains/Losses	Schedule D	X	"D"
Form 1099-C	Cancelled Debt	Form 1099-C		"1099C"
Form 1099-DIV	Dividends	Schedule B – Part II	X	"B"
Form 1099-G	Unemployment Comp for IL ( <b>EIN: 36-3042127</b> ) or Taxable IL State Refund ( <b>EIN: 37-6002057</b> )	1099-G Worksheet	X	"99G"
Form 1099-INT	Interest Income	Schedule B – Part I	X	"B"
Form 1099-K	Merchant Card & Third-Party Payments	1099-K Worksheet		"99K"
Form 1099-Misc	Miscellaneous Income	1099-MISC Worksheet	X	"99M"
Form 1099-R	Retirement Income	1099-R Worksheet	X	"99R"
Form 1099-S	Sale of Home	Home Sale Worksheet		"Sale"
Form 1099-SA (HSA Cert Required)	Distribution from an HSA	1099-SA Worksheet		"SA"
Form 5498-SA (HSA Cert Required)	HSA Contributions	Form 8889 -Taxpayer/Spouse		"8889"
Form RRB-1099	Railroad Retirement Benefits	1099-R Wks & Social Sec	X	"99R" & "Soc"
Form SSA-1099	Social Security Benefits	Social Sec Worksheet	X	"Soc"
Form W-2*	Wage Income	W-2 Worksheet	X	"W2"
Form W-2G	Gambling Winnings	W-2G Worksheet		"W2G"
Itemized Deductions - 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	Schedule A	X	"A"
Split Refund or Purchase Savings Bonds	Allocation of Refund to more than one account or purchase Savings Bonds	Form 8888	X	"8888"

\*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.

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.