**ALABAMA DEPARTMENT OF REVENUE**

**TEST SCENARIOS FOR THE 2021**

**ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 2**

**FORMS REQUIRED:**

Form 40A: Individual Income Tax Return

Schedule W-2: Wages, Salaries, Tips, etc.

**OTHER INFORMATION ABOUT THE TEST:**

**Refund Return**

**Taxpayer Name – Occupation – SSN**

**Name:** Jacob L. Trickster

**Occupation:** Financial Advisor

**SSN:** 400-31-7402

**Name:** Rachel U. Trickster

**Occupation:** Electrical Engineer

**SSN:** 400-31-7492

**Deceased Date:** 01/15/2021

**Address:** 5671 Wrong Sister Way, Muscle Shoals, AL 35662

**Complete all fields with keying dots for sections requested – if applicable.**

**Form 40A: Alabama Individual Income Tax Return**

**How/What to Complete the Form**

**Filing Status/Exemptions Section:**

**Filing Status:** Married Filing Joint

**Income and Adjustments Section:**

Complete Lines 5a – 7

**Deductions Sections:**

Complete Lines 8 – 12

**Tax and Payments Section:**

Complete Lines 13 – 19, 21, 23

Consumer Use Tax Checkbox Checked

Alabama Democratic Party $1 checked

Alabama Republican Party $1 checked

**Amount You Owe Section:**

Not completed – Refund Return

**Overpaid Section:**

Complete Line 25

**Donations Section:**

Complete Line 26

Complete Part IV Lines 1a – 1r

**Refund Section:**

Complete Line 27

**Authorization Section:**

Checkbox: I authorize a representative… Checked

Complete Paid Preparers Information (Enter Preparers SSN or PTIN)

**Part 1: General Information Section:**

Complete Lines 1 – 6

Complete Line 2: Yes

Complete Source and Amount x 3

**Part 2: Dependents Section**

Complete Lines 1a – 2

Four Dependents

**Part 3: Federal Tax Liability Deduction Section**

Complete Line 1

**Part 4: Donation Check-Offs Section:**

Complete Lines 1a – 1r

**Drivers License Info Section:**

Complete Section for Primary Taxpayer

Complete Section for Spouse

**Schedule Information**

**Schedule W-2: Wages, Salaries, Tips, etc.**

Complete 15 entries

Entries should be “AL” and “OS