**ALABAMA DEPARTMENT OF REVENUE**

**TEST SCENARIOS FOR THE 2021**

**ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 3**

**FORMS REQUIRED:**

Form 40NR: Individual Income Tax Return – NonResident Only

Schedule A: Itemized Deductions

Schedule B: Interest and Dividend Income

Schedule D: Net Profit or Loss

Schedule E: Supplemental Income and Loss

Schedule DS: Dependents Schedule

Schedule HOF: Head of Family Schedule

Schedule CP: Composite Payments

NOL-85A: Net Operating Loss Carryback or Carryforward

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

EOO: Alabama E-file Opt Out Election Form

**OTHER INFORMATION ABOUT THE TEST:**

**Refund Return**

**Amended Return checkbox**

**Taxpayer Name – Occupation – SSN**

**Primary Name:** Jacob G. Trickster

**Occupation:** Banker

**SSN:** 400-19-7473

**Address:** 4587 Ladder Drive, Atlanta, GA 30300

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

**Form 40NR: Alabama Individual Income Tax Return – NonResident**

**How/What to Complete the Form**

**Filing Status/Exemptions Section:**

**Filing Status:** Head of Family

**Income and Adjustments Section:**

Complete Lines 5 – 12

**Deductions Sections:**

Complete Lines 13a – 17

Choose Itemized Deduction for Line 13a

Complete Schedule A

**Tax Section:**

Complete Lines 18 – 20

Check Form NOL-85a checkbox

**Payment Section:**

Compete Lines 21 – 28

Complete Schedule CP: Composite Payments

**Amount You Owe Section:**

Not Completed: Refund Return

**Overpaid Section:**

Complete Lines 31 – 32

**Refund Section:**

Complete Line 33

**Authorization Section:**

Check the “authorization checkbox”

Complete Primary Tax Information

Complete the Paid Preparer’s Use Only Section

**Part 1: Other Income Section:**

Complete Lines 1, 2, 5, 6, 8 and 9

Complete Schedule B

Complete Schedule D

Complete Schedule E

**Part 2: Adjustments to Income Section:**

Complete Lines 3, 5, 6 and 8

**Part 3: Other Adjustments:**

Complete Lines 1, 2, 4 – 6

**Part 4: Federal Income Tax Deduction:**

Complete Lines 4, 6 and 7

**Part 5: Dependents Section:**

Complete Lines 1 – 4

Complete Schedule DS: Dependents Schedule for twelve dependents

**Part 6: General Information:**

Complete Lines 1 – 6

Did you file a return with that state for 2021? No

If married, did your spouse receive a separate income for 2021? Not completed

If yes, is your spouse filing a separate Alabama return? Not completed

Did you file an Alabama return for previous year? No

**Drivers License Info Section:**

Complete Section for Primary Taxpayer

**Schedule Information**

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

Complete 4 entries

Entries should be “AL” and “OS”

**NOL-85A: Net Operating Loss Carryback or Carryforward**

Complete Part I and Part II.

Complete six NOL-85A