

**ALABAMA DEPARTMENT OF REVENUE
TEST SCENARIOS FOR THE 2018
ALABAMA INDIVIDUAL INCOME TAX RETURN**

TEST # 1

FORMS REQUIRED:

FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN
ALABAMA SCHEDULE B - INTEREST AND DIVIDEND INCOME
ALABAMA SCHEDULE NTC: NET TAX CALCULATOR
ALABAMA SCHEDULE RC: REFUNDABLE CREDIT
ALABAMA SCHEDULE DEC: CAREER TECHNICAL DUAL ENROLLMENT CREDIT
ALABAMA SCHEDULE AJA: ALABAMA JOBS ACT – INVESTMENT CREDIT
ALABAMA SCHEDULE HTC – Historic Tax Rehabilitation Credit
FEDERAL INCOME TAX DEDUCTION WORKSHEET

RETURNS NEEDED:

1- FEDERAL W-2
1- FEDERAL 1099-R
1- FEDERAL FORM 3903: MOVING EXPENSES
1- FEDERAL SCHEDULE F: PROFIT OR LOSS FROM FARMING

NOTE: ASSUME ALL FARM EQUIPMENT HAS BEEN FULLY DEPRECIATED

OTHER INFORMATION ABOUT THE TEST:

Part-Year Return

Taxpayer has chosen to claim the standard deduction

MAY IRS DISCUSS THIS RETURN WITH PREPARER: NO
MAY ALABAMA DISCUSS THIS RETURN WITH PREPARER: YES

Is this refund going to or through an account that is located outside of the United States? No

Add ALL applicable Authentication Header elements (including below)

DRIVER'S LICENSE INFORMATION

State Issued Number, State Issued State Code, Expiration Date and Issued Date

Cell phone number

PREPARER FIRM:
PREPARER SSN:
PREPARER EIN:
PREPARER PTIN:
PREPARER PHONE:
PREPARER SELF-EMPLOY IND: YES
PREPARER ADDRESS:

PAID PREPARER:
ADDRESS: SAME AS FIRM ADDRESS
TAXPAYER:
NAME: Paul Tarsus
OCCUPATION: Accountant
Daytime phone #:
AGE:
SSN: 400-00-7401

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TEST # 1 OTHER INFORMATION CONTINUED

FILING STATUS: Single

NUMBER OF DEPENDENTS: NONE

ADDRESS:

AMOUNT APPLIED TO ALABAMA 2018 ESTIMATED TAX:NONE

TAXPAYER HAS ELECTED TO DIRECT DEPOSIT REFUND:

RTN:
ACCT#:
CHECKING:

ADDITIONAL FED TAX ON QUALIFIED PLANS, INCLUDING IRAS 500
(PREMATURE DISTRIBUTION ON IRA ACCOUNT),

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TEST # 1 OTHER INFORMATION

ALABAMA ELECTION CAMPAIGN FUND:

ALABAMA DEMOCRATIC PARTY	1
ALABAMA REPUBLICAN PARTY	0

CONSUMER USE TAX: 20

*****POPULATE FORM 40NR, PART II, Contributions to a health savings account*****

RESIDENCY:	PART-YEAR
FILED AL RETURN PRIOR YEAR?	YES
CURRENT EMPLOYER:	SAME AS ON W-2

TAXPAYER MOVED FROM ATLANTA, GA (TO) MONTGOMERY, AL: 160 MILES

OTHER FED INCOME? NONE

ESTIMATED PAYMENTS OF ALABAMA INCOME TAX 2018:

4/18	50
6/18	50
9/18	50
1/19	50

ALIMONY RECEIVED:	4000
TOTAL IRA DISTRIBUTIONS:	5000
TAXABLE IRA DISTRIBUTIONS:	5000
FARM INCOME (SEE FEDERAL SCHEDULE F)	200
OTHER INCOME: Bingo Winnings	500
PENALTY ON EARLY WITHDRAWAL OF SAVINGS:	500
MOVING EXPENSES (SEE FEDERAL FORM 3903)	1200

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TEST # 1 INTEREST AND DIVIDEND INCOME INFORMATION

Taxable Interest:

Bank A	25
Bank B	50
Bank C	75
Bank D	100
Bank E	125
Bank F	150
Bank G	175
Bank H	200
Bank I	225
Bank J	10
Bank K	20
Bank L	30
Bank M	40
Bank N	50
Bank O	60
Bank P	70
Bank Q	80
Bank R	90
Bank S	100

Taxable Dividends:

CORPORATION A	25
CORPORATION B	30
CORPORATION C	35
CORPORATION D	40
CORPORATION E	45
CORPORATION F	50
CORPORATION G	55
CORPORATION H	60
CORPORATION I	65
CORPORATION J	10
CORPORATION K	20
CORPORATION L	30
CORPORATION M	40
CORPORATION N	50
CORPORATION O	60
CORPORATION P	70
CORPORATION Q	80
CORPORATION R	90
CORPORATION S	100

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TEST # - 1 - W-2 Information

W-2 Block

- a. Control Number:
- b. Employer's ID No:
- c. Employer's Name, Address, and Zip Code:

- d. Employee SSN: 400-00-7401
- e. Employee's Name, Address and Zip Code:

- 1. Wages, Tips, and Other Compensation:
- 2. Federal Income Tax Withheld:
- 3. Social Security Wages:
- 4. Social Security Tax Withheld:
- 5. Medicare Wages and Tips:
- 6. Medicare Tax Withheld:
- 7. Social Security Tips:
- 8. Allocated Tips:
- 9. Advance EIC Payment:
- 10. Dependent Care Benefits:
- 11. Nonqualified Plans:
- 12. a, b, c, d
- 13. N/A
- 14. Other: N/A
- 15. State 1: AL
Employer's State ID No:
- 16. State Wages:
- 17. State Income Tax:

Blocks 18 through 20: Not Applicable

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TEST # 1

2018 - 1099- R Information

Payers Name, street address, city, state and zip code:

Payer's Federal ID #:

Recipient's Identification number: 400-00-7401

Recipient's Name, address, city, state and zip:

1099-R Block

- | | | |
|------|---|-------|
| 1. | Gross distribution: | |
| 2a. | Taxable amount: | |
| 2b. | Total distribution: | yes |
| 3. | Capital gain: | N/A |
| 4. | Federal income tax withheld: | none |
| 5. | Employee contributions: | none |
| 6. | Net unrealized appreciation: | none |
| 7. | Distribution code/IRA/SEP: | 1/yes |
| 8. | Other: | none |
| 9ab. | Your %/Total contributions: | N/A |
| 10. | Amount allocable to IRR w/i 5 yrs | none |
| 11. | 1 st year of design. Roth contrib. | none |
| 12. | State tax withheld: | none |
| 13. | State/Payer's state no: | |
| 14. | State distribution: | |

Lines 15, 16 and 17: none