

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

TEST # 4

FORMS REQUIRED:

FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN
ALABAMA SCHEDULE A: ITEMIZED DEDUCTIONS
ALABAMA SCHEDULE B: INTEREST AND DIVIDEND INCOME
ALABAMA SCHEDULE DS: DEPENDENT SCHEDULE
ALABAMA SCHEDULE HOF: HEAD OF FAMILY
ALABAMA SCHEDULE NTC: NET TAX CALCULATOR
ALABAMA SCHEDULE AJA – ALABAMA JOBS ACT- INVESTMENT CREDIT
ALABAMA SCHEDULE DEC – CAREER TECHNICAL DUAL ENROLLMENT CREDIT
ALABAMA SCHEDULE ARA – ALABAMA RENEWAL ACT CREDIT
ALABAMA SCHEDULE IRC – IRRIGATION/RESERVOIR SYSTEM CREDIT
ALABAMA SCHEDULE SBA – SMALL BUSINESS AND AGRIBUSINESS JOBS CREDIT

FEDERAL INCOME TAX DEDUCTION WORKSHEET

RETURNS NEEDED:

1 - FEDERAL FORM 1099-R
1 - W-G CERTAIN GAMBLING WINNINGS
1 - FEDERAL FORM C: PROFIT OR LOSS FROM BUSINESS (STATUTORY EMPLOYEE)
1 – W-2 (STATUTORY EMPLOYEE)

OTHER INFORMATION ABOUT THE TEST:

MAY IRS DISCUSS THE RETURN WITH PREPARER: NO
MAY ALABAMA DISCUSS THE RETURN WITH PREPARER: NO

Consumer Use Tax: 500.00

TAXPAYER HAS ELECTED TO DIRECT DEBIT:

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

RTN:
ACCT#:
SAVINGS: YES

Add ALL the 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 PHONE:
PREPARER SELF-EMPLOY IND: Yes
PREPARER ADDRESS:

PAID PREPARER:
ADDRESS: SAME AS FIRM ADDRESS

TAXPAYER:
NAME: David Psalm
OCCUPATION: Shepherd (Statutory Employee)
Daytime phone #
AGE:
SSN: 400-00-7404

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TEST # 4 OTHER INFORMATION

FILING STATUS: Head of Family
NAME OF QUALIFYING PERSON: Absalom Psalm
SSN OF QUALIFYING PERSON: 400-00-7484
RELATIONSHIP OF QUAL PERSON: Son
NUMBER OF DEPENDENTS: 4

ADDRESS:

ALABAMA ELECTION CAMPAIGN FUND:

ALABAMA DEMOCRATIC PARTY	1
ALABAMA REPUBLICAN PARTY	0

RESIDENCY: FULL YEAR
FILED AL RETURN PRIOR YEAR? YES
CURRENT EMPLOYER:

OTHER FED INCOME? NONE

ESTIMATED PAYMENTS OF ALABAMA INCOME TAX:

4/18	575
6/18	575
9/18	575
1/19	575

ESTIMATE PAYMENTS OF FED INCOME TAX:

ALIMONY RECEIVED:

BUSINESS INCOME OR LOSS – FED SCH C

TOTAL PENSIONS AND ANNUITIES:

TAXABLE PENSIONS AND ANNUITIES:

OTHER INCOME: W – 2 G GAMBLING WINNINGS

SELF-EMPLOYED HEALTH INSURANCE DEDUCTION

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**ITEMIZED DEDUCTION INFORMATION FOR
ALABAMA SCHEDULE A - ITEMIZED DEDUCTIONS**

MEDICAL AND DENTAL EXPENSES - Line 1:

REAL ESTATE TAXES - Line 5:

FICA TAX - Line 6:

OTHER TAXES - Line 8: Personal Property

HOME MORTGAGE INTEREST REPORTED ON FEDERAL

HOME MORTGAGE INTEREST NOT REPORTED ON FEDERAL
FORM 1098 - Line b:

POINTS NOT REPORTED ON FORM 1098 - Line 12:

CONTRIBUTIONS BY CASH OR CHECK - Line 15:

CONTRIBUTIONS OTHER THAN CASH OR CHECK - Line 16:

CONTRIBUTION CARRYOVER FROM PRIOR YEAR - Line 17:

OTHER MISC DEDUCTIONS - Line 25: GAMBLING LOSS

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DEPENDENT INFORMATION

DEPENDENT NO. 1

DEPENDENT NAME:	Absalom Psalm
DEPENDENT SSN:	400-00-7484
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	2013

DEPENDENT NO. 2

DEPENDENT NAME:	Adonijah Psalm
DEPENDENT SSN:	400-00-7474
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	2011

DEPENDENT NO. 3

DEPENDENT NAME:	Shobab Psalm
DEPENDENT SSN:	400-00-7464
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	2004

DEPENDENT NO. 4

DEPENDENT NAME:	Solomon Psalm
DEPENDENT SSN:	400-00-7454
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	206

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INTEREST AND DIVIDEND INCOME INFORMATION

Taxable Interest:

Bank A

Bank B

Bank C

Bank D

Bank E

Bank F

Bank G

Bank H

Taxable Dividends:

Corp K

Corp L

Corp M

Corp N

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TEST # 4 1099-R Information

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

Payer's Federal ID #:

Recipient's Identification number: 400-00-7404

Recipients Name, address, city, state and zip:

David Psalm

1099-R Block

1.	Gross distribution:	500.00
2a.	Taxable amount:	500.00
b.	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:	7/no
8.	Other:	none
9a-9b.	Your %/Total contributions:	n/a
12.	State tax withheld:	none
13.	State/Payer's state no:	AL 123457
14.	State distribution:	500.00
Lines 15, 16 and 17		N/A

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TEST # 4 – W - 2G Information

W-2G BLOCK:

Payer's Federal ID No:

State/Payer's telephone number:

State/Payer's Name, Address, and Zip Code:

Winner's Name, Address and Zip Code:

David Psalm

1. Gross Winnings:	4935.00
2. Date Won	10/15/2018
3. Type of Wager:	Trifecta
4. Federal Income Tax Withheld:	none
5. Transaction:	05557-D97322
6. Race:	Ellis Park # 5
7. Winnings From Identical Wagers:	none
8. Cashier:	Ms Lucky Streak
9. Winner's Taxpayer Identification No.:	400-00-7404
10. Window:	3002
11. First I.D.:	AL 1264568
12. Second I.D.:	none
13. State/Payer's State Identification No.:	AL 213123456
14. State Winnings	none
15. State Income Tax Withheld:	None

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TEST # 4 - W-2 Information

W-2 Block: Statutory Employee

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

- d. Employee SSN: 400-00-7404
- e. Employee's Name, Address and Zip Code:

David Psalm

- 1. Wages, Tips, and Other Compensation:
 - Federal Income Tax Withheld: none
- 2. Social Security Wages:
- 4. Social Security Tax Withheld:
- 5. Medicare Wages and Tips:
- 6. Medicare Tax Withheld:
- 7. Social Security Tips: 0
- 8. Allocated Tips: 0
- 9. Advance EIC Payment: 0
- 10. Dependent Care Benefits: 0
- 11. Nonqualified Plans: 0
- 12. a, b, c, d 0
- 13. Statutory Employee Box Indicator **yes (checked)**
- 14. Other: N/A
- 15. State: AL
- Employer's State ID No:
- 16. State Wages 1:
- 17. State Income Tax: none
- 18. Blocks 18 through 20: Not Applicable