**ALABAMA DEPARTMENT OF REVENUE**

**TEST SCENARIOS FOR THE 2020**

**ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 3**

**FORMS REQUIRED:**

Form 40: Individual Income Tax Return

Schedule A: Itemized Deductions

Schedule B: Interest and Dividend Income

Schedule DS: Dependents Schedule

NOL-85A: Net Operating Loss Carryback or Carryforward

Schedule D: Net Profit or Loss

EOO: Alabama E-file Opt Out Election Form

**OTHER INFORMATION ABOUT THE TEST:**

**Refund Return**

**Taxpayer Name – Occupation – SSN**

**Primary Name:** Abraham Q. Terah

**Occupation:** Locksmith

**SSN:** 400-48-7403

**Secondary Name:** Sarah Y. Terah

**Occupation:** Mechanical Engineer

**SSN:** 400-01-7492

**Deceased Date:** 05/15/2020

**Address: 900 Wannachild Drive, Hoover, AL 35080**

**Complete all fields, but especially those next to keying dots – if applicable.**

**Form 40: 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 6 – 10

**Deductions Sections:**

Complete Lines 11a – 15

Choose Itemized Deduction for Line 11a

**Tax Section:**

Complete Lines 16 – 21

Check Form NOL-85a box

Alabama Democratic Party $none checked

Alabama Republican Party $none checked

**Payment Section:**

Compete Lines 22, 26 and 28

**Amount You Owe Section:**

Not completed – Refund Return

**Overpaid Section:**

Complete Line 31

**Donations Section:**

Not completed

**Refund Section:**

Complete Line 34

For Direct Deposit Checkbox

**Part 1: Other Income Section:**

Complete Lines 2, 3, 4a, 4b, 8 and 9

Complete Schedule D

**Part 2: Adjustments to Income Section**

Complete Lines 1a, 1b, 3, 6, 9 and 15

**Part 3: Dependents Section**

Complete Line 1 – 2

Complete Schedule DS: Dependents Schedule

Number of Dependents: 3

**Part 4: General Information Section:**

Complete Lines 1 – 5

Did you file an Alabama income tax return for the previous year? Yes

Do you have income reported on Federal, but not Alabama? Yes

Complete Source and Amount x 2

**Part 5: Direct Deposit Section**

Complete Lines 1 – 4

Savings

Is this refund going to outside United States? No

**Drivers License Info Section:**

Complete Section for Primary and Secondary Taxpayer

**Authorization Section:**

Check the “authorization checkbox”

Complete Primary and Secondary Tax Information

Complete the Paid Preparer’s Use Only Section

**Schedule Information**

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

Complete Part I and Part II.

Complete six NOL-85A