**ALABAMA DEPARTMENT OF REVENUE**

**TEST SCENARIOS FOR THE 2020**

**ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 4**

**FORMS REQUIRED:**

Form 40: Individual Income Tax Return

Schedule A: Itemized Deductions

Schedule CR: Credits for Taxes Paid to Other States

Schedule OC: Other Available Credits

Schedule AATC: Alabama Accountability Tax Credit

Schedule KRCC-I: Recipient’s Share of Capital Credit for Individual Taxpayers

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**

**Part-Year Return**

**Taxpayer Name – Occupation – SSN**

**Primary Name:** Gomer P. Beeri

**Occupation:** Therapist

**SSN:** 400-13-7404

**Address: 6402 Astray Boulevard, Huntsville, AL 35749**

**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 Separate. Complete Spouse SSN: 400-00-7493

**Income and Adjustments Section:**

Complete Lines 5a, 7 – 10

**Deductions Sections:**

Complete Lines 11a – 13, 15

Choose Itemized Deduction for Line 11a

Complete Schedule A

**Tax Section:**

Complete Lines 16 – 21

Schedule OC checkbox checked

Alabama Democratic Party $none checked

Alabama Republican Party $none checked

**Payment Section:**

Compete Lines 22 – 28

**Amount You Owe Section:**

Not completed – Refund Return

**Overpaid Section:**

Complete Lines 31 – 32

**Donations Section:**

Not completed

**Refund Section:**

Complete Line 34

For Direct Deposit Checkbox

**Part 1: Other Income Section:**

Complete Lines 2, 5a, 5b, 8 and 9

**Part 2: Adjustments to Income Section**

Complete Lines 7, 12 and 15

**Part 3: Dependents Section**

Not Completed

**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

**Authorization Section:**

Check the “authorization checkbox”

Complete Primary Tax Information

Complete the Paid Preparer’s Use Only Section

**Schedule Information**

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

Complete 4 entries

Entries should include wages that have State Codes of “AL” and “OS”.

**Schedule AATC: Alabama Accountability Tax Credit**

Complete Part I, lines 1-18 and 37

**Schedule CR: Credits for Taxes Paid to Other States**

Complete Parts 1, 2 and 6

**Schedule KRCC-I: Recipient’s Share of Capital Credit for Individual Taxpayers**

Complete two KRCC-Is.

**Schedule OC: Other Available Credits**

Complete Section A.

Complete Section B, Part A. Credit for Taxes Paid to Other States (Form 40 Only).

Complete Section B, Part B. Alabama Enterprise Zone Credit or Exemption.

Complete Section B, Part C. Basic Skills Education Credit.

Complete Section B, Part D. Rural Physician Credit.

Complete Section B, Part E. Coal Credit.

Complete Section B, Part F. Full Employment Act of 2011 Credit.

Complete Section B, Part G. Veterans Employment Act - Employer’s Credit.

Complete Section B, Part I. Credit for Taxes paid to a Foreign Country (For Form 40 Only).

Complete Section B, Part L. Alabama Accountability Act Credit - Scholarship Granting Organization (SGO) portion.

Complete Section B, Part N. 2013 Alabama Historic Rehabilitation Tax Credit.

Complete Section B, Part V. Income Tax Capital Credit.

Complete Section C.

Complete Section E.