**ALABAMA DEPARTMENT OF REVENUE**

**TEST SCENARIOS FOR THE 2020**

**ALABAMA INDIVIDUAL INCOME TAX RETURN**

**Updated: 09/25/2020**

**TEST # 4**

**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 OC: Other Available Credits

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**

**Taxpayer Name – Occupation – SSN**

**Primary Name:** Mark H. Roman

**Occupation:** Cashier

**SSN:** 400-83-7464

**Address:** 5342 Apollos Way, Newark, NJ 07029

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

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

**How/What to Complete the Form**

**Filing Status/Exemptions Section:**

**Filing Status:** Married Filing Separate. Complete Spouse SSN: 400-00-7494

**Income and Adjustments Section:**

Complete Lines 5 – 12

**Deductions Sections:**

Complete Lines 13a, 14, 15 and 17

Choose Itemized Deduction for Line 13a

**Tax Section:**

Complete Lines 18 – 20

Complete Schedule OC: Other Available Credits

**Payment Section:**

Compete Lines 21, 22, 25, 26 and 28

Complete Schedule OC, Section F

**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 2, 5, 8 and 9

Complete Schedule D

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

Complete Lines 1, 2, 5, 6 and 8

**Part 3: Other Adjustments:**

Complete Lines 3 – 6

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

Complete Lines 1 – 7

**Part 5: Dependents Section:**

No Dependents

**Part 6: General Information:**

Complete Lines 1 – 6

Did you file a return with that state for 2020? No

If married, did your spouse receive a separate income for 2020? 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”

**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 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 L. Alabama Accountability Act Credit - Scholarship Granting Organization (SGO) portion.

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

Complete Section C.

Complete Section E.