

2D SPECIFICATIONS FOR SCHEDULE P (540)

Schedule P (540) 2D Specifications Barcode 1 of 1

Index/ Field No.	Line/ Box No.	Description	Data Type A = Alpha N = Numeric AN = Alphanumeric X = Checkbox	Length	Value/ Comments	Special Printing Instructions on Substitute Form(s) Blank = Print in associated field
1	Header	Header Version Number	N	2	T1	
2	Header	CTP ID	N	3		
3	Gov't	Tax Year	N	4	YYYY	
4	Gov't	Form Type	N	6	797	
5	Gov't	Software Developer Version	N	3	001. Increment plus 1 for change to the barcode.	
6	Gov't	FTB Specification Version	N	3	001. See Header Fields Definitions in Publication 1098, Part II for more information.	
7		Taxpayer's First Name	A	11		
8		Taxpayer's Middle Initial	A	1		
9		Taxpayer's Last Name	A	35		
10		Taxpayer Suffix	A	4		
11		Taxpayer's SSN, or ITIN	N	9		
12	2	Medical and dental expenses	N	15		
13	3	Personal property taxes and real property taxes	N	15		
14	4	Certain interest on a home mortgage not used to buy, build, or improve your home	N	15		
15	5	Miscellaneous itemized deductions	N	15		
16	6	Refund of personal property taxes and real property taxes	N	15		
17	7	Investment interest expense adjustment	N	15	Special chars: -	
18	8	Post-1986 depreciation	N	15	Special chars: -	
19	9	Adjusted gain or loss	N	15	Special chars: -	
20	10	Incentive stock options and California qualified stock options (CASOs)	N	15	Special chars: -	
21	11	Passive activities adjustment	N	15	Special chars: -	
22	12	Beneficiaries of estates and trusts	N	15	Special chars: -	
23	13a	Circulation expenditures	N	15	Special chars: -	
24	13b	Depletion	N	15	Special chars: -	
25	13c	Installment sales	N	15	Special chars: -	
26	13d	Intangible drilling costs	N	15	Special chars: -	
27	13e	Long-term contracts	N	15	Special chars: -	
28	13f	Loss limitations	N	15	Special chars: -	
29	13g	Mining costs	N	15	Special chars: -	
30	13h	Patron's adjustment	N	15	Special chars: -	
31	13i	Pollution control facilities	N	15	Special chars: -	
32	13j	Research and experimental	N	15	Special chars: -	
33	13k	Tax shelter farm activities	N	15	Special chars: -	
34	13l	Related adjustments	N	15	Special chars: -	

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35	13	Other adjustments and preference. Enter the amount if any for each item a through	N	15	Special chars: -	
36	14	Total adjustments and preferences	N	15	Special chars: -	
37	15	Enter taxable income from Form 540	N	15	Special chars: -	
38	16	Regular NOL deductions	N	15		
39	17	AMTI exclusion line 17	N	15		
40	18	Federal adjusted gross income	N	15		
41	19	Combine 14 through 18	N	15	Special chars: -	
42	20	AMT NOL deduction	N	15	Special chars: -	
43	21	AMTI	N	15	Special chars: -	
44	22	Exemption amount	N	15		
45	24	Tentative minimum tax	N	15	Special chars: -	
46	25	Regular tax before credits	N	15	Special chars: -	
47	26	Alternative minimum tax	N	15		
48	Part III, Line 1	Enter the amount from 540, line 35	N	15	Special chars: -	
49	Part III, Line 2	Enter the tentative minimum tax from Part II, line 24	N	15	Special chars: -	
50	Part III, Line 3c	Excess tax that may be offset by credits	N	15		
51	Part III, Line 4b	Code: 162 Prison inmate labor, credit used	N	15		
52	Part III, Line 5b	Code: 232 Child and dependent care expenses, credit used	N	15		
53	Part III, Line 6	Code	N	3		
54	Part III, Line 6b	Credit used	N	15		
55	Part III, Line 6d	Credit carryover	N	15		
56	Part III, Line 7	Code	N	3		
57	Part III, Line 7b	Credit used	N	15		
58	Part III, Line 7d	Credit carryover	N	15		
59	Part III, Line 8	Code	N	3		
60	Part III, Line 8b	Credit used	N	15		
61	Part III, Line 8d	Credit carryover	N	15		
62	Part III, Line 9	Code	N	3		
63	Part III, Line 9b	Credit used	N	15		
64	Part III, Line 9d	Credit carryover	N	15		

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65	Part III, Line 10a	Code: 188 Credit for prior year AMT, credit amount	N	15		
66	Part III, Line 10b	Code: 188 Credit for prior year AMT, credit used	N	15		
67	Part III, Line 10d	Code: 188 Credit for prior year AMT, credit carryover	N	15		
68	Part III, Line 11c	Enter the amount from line 1 or....	N	15	Special chars: -	
69	Part III, Line 12b	Code: 170 Credit for joint custody head of household, credit used	N	15		
70	Part III, Line 13b	Code: 173 Credit for dependent parent, credit used	N	15		
71	Part III, Line 14b	Code: 163 Credit for senior head of household, credit used	N	15		
72	Part III, Line 15b	Nonrefundable renter's credit, credit used	N	15		
73	Part III, Line 16	Code	N	3		
74	Part III, line 16b	Credit used	N	15		
75	Part III, line 16d	Credit carryover	N	15		
76	Part III, Line 17	Code	N	3		
77	Part III, Line 17b	Credit used	N	15		
78	Part III, Line 17d	Credit carryover	N	15		
79	Part III, Line 18	Code	N	3		
80	Part III, Line 18b	Credit used	N	15		
81	Part III, Line 18d	Credit carryover	N	15		
82	Part III, Line 19	Code	N	3		
83	Part III, Line 19b	Credit used	N	15		
84	Part III, Line 19d	Credit carryover	N	15		
85	Part III, Line 20b	Code: 187 Other state tax credit, credit used	N	15		
86	Part III, Line 21c	Enter your alternative minimum tax from Part II, line 26	N	15	Special chars: -	
87	Part III, Line 22b	Code: 180 solar energy credit carryover used this year	N	15		
88	Part III, Line 22d	Code: 180 solar energy credit carryover	N	15		
89	Part III, Line 23b	Code: 181 Commercial solar energy credit carryover used this year	N	15		

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90	Part III, Line 23d	Code: 181 Commercial solar energy credit carryover	N	15		
91	Part III, Line 24c	Adjusted AMT	N	15	Special chars: –	
92		END OF FILE	AN	5	*EOD*	

Alternative Minimum Tax and Credit Limitations – Residents

2020

P (540)

Attach this schedule to Form 540.

Name(s) as shown on Form 540

7-10

Your SSN or ITIN

11

Part I Alternative Minimum Taxable Income (AMTI) Important: See instructions for information regarding California/federal differences.

Table with 21 rows for Part I, including items like Medical and dental expenses, Personal property taxes, and Incentive stock options. Includes sub-rows a through l for adjustments.

Part II Alternative Minimum Tax (AMT)

Table with 6 rows for Part II, including Exemption Amount, Tentative Minimum Tax, and Alternative Minimum Tax.

Part III Credits that Reduce Tax Note: Be sure to attach your credit forms to Form 540.

1 Enter the amount from Form 540, line 35.	● 1	48	00
2 Enter the tentative minimum tax from Side 1, Part II, line 24.	● 2	49	00

	(a) Credit amount	(b)* Credit used this year	(c) Tax balance that may be offset by credits	(d) Credit carryover
Section A – Credits that reduce excess tax.				
3 Subtract line 2 from line 1. If zero or less enter -0- and see instructions. This is your excess tax which may be offset by credits. 3			● 50	
A1 Credits that reduce excess tax and have no carryover provisions.				
4 Code: 162 Prison inmate labor credit (FTB 3507) 4		● 51		
5 Code: 232 Child and dependent care expenses credit (FTB 3506) 5		● 52		
A2 Credits that reduce excess tax and have carryover provisions. See instructions.				
6 Code: ● 53 Credit Name: 6		● 54		● 55
7 Code: ● 56 Credit Name: 7		● 57		● 58
8 Code: ● 59 Credit Name: 8		● 60		● 61
9 Code: ● 62 Credit Name: 9		● 63		● 64
10 Code: 188 Credit for prior year alternative minimum tax. 10	● 65	● 66		● 67
Section B – Credits that may reduce tax below tentative minimum tax.				
11 If Part III, line 3 is zero, enter the amount from line 1. If line 3 is more than zero, enter the total of line 2 and the last entry in column (c). 11			● 68	
B1 Credits that reduce net tax and have no carryover provisions.				
12 Code: 170 Credit for joint custody head of household. 12		● 69		
13 Code: 173 Credit for dependent parent 13		● 70		
14 Code: 163 Credit for senior head of household 14		● 71		
15 Nonrefundable renter's credit 15		● 72		
B2 Credits that reduce net tax and have carryover provisions. See instructions.				
16 Code: ● 73 Credit Name: 16		● 74		● 75
17 Code: ● 76 Credit Name: 17		● 77		● 78
18 Code: ● 79 Credit Name: 18		● 80		● 81
19 Code: ● 82 Credit Name: 19		● 83		● 84
B3 Other state tax credit.				
20 Code: 187 Other state tax credit 20		● 85		
Section C – Credits that may reduce alternative minimum tax.				
21 Enter your alternative minimum tax from Side 1, Part II, line 26. 21			● 86	
22 Code: 180 Solar energy credit carryover from Section B2, column (d) 22		● 87		● 88
23 Code: 181 Commercial solar energy credit carryover from Section B2, column (d) 23		● 89		● 90
24 Adjusted AMT. Enter the balance from line 23, column (c) here and on Form 540, line 61 24			● 91	

*If the taxpayer is subject to the business credit limitation, the total of the business credits in Part III, column (b) cannot exceed \$5,000,000. See instructions.

This space reserved for 2D barcode

SCHEDULE P (540) BARCODE PLACEMENT

Schedule P (540) Barcode Placement Side 2 Specifications

Comments: Use Courier 12-point font, for CTP ID and Doc. ID (print line 63).

<u>Print Line Number</u>	<u>Identification</u>	<u>Begin Print Position</u>	<u>Maximum Field Length</u>	<u>End Print Position</u>	<u>Field Description</u>
1-3	Blank lines	–	–	–	–
4	Anchor Mark	59	2	60	Anchor mark, Conventional form size/style
5-53	Blank lines	–	–	–	–
54-60	“2D BARCODE”	7	73	79	Conventional form size/style
61	Blank line	–	–	–	–
62-63	Bottom Registration Mark, Anchor Mark, and conventional form	–	–	–	End of bottom registration mark, anchor mark and conventional form size/style
63	CTP ID (mandatory)	32	3	34	Numeric
63	Doc. ID (mandatory)	40	7	46	Numeric, “7972204” (Side 2)

