

Test Scenario 3

This is a criteria based test. Vendors will create their own test return. Below is the minimum information needed to prepare the return. Additional income, deductions, credits, etc. may be added. A completed Federal return, including all forms and schedules, must be included. Some knowledge of tax law and tax preparation is necessary to correctly prepare the return.

Oklahoma Form: 513NR

Taxpayer Information:

ABC Trust (FEIN 11-4567894)
123 Honest Lane
Madison WI 53703

Fiduciary: Careful Investor, Trustee

Information:

- This is a complex nonresident trust. There is no income distribution for either Federal or Oklahoma.
- The entity was created on 4/15/2014.
- A return was filed last year.
- The return results in a balance due.

Income:

- In the Income section, a minimum of six lines should have an amount.
- For every item of income in Form 513NR, Column A there should be an amount in Column B. The amounts in Column A & Column B should not be the same.

Deductions:

- In the Deductions (Oklahoma Subtractions) section, there is at least one type of deduction on lines 13 - 17.