

# 2017 DATA ENTRY SCREEN CODES FORM 1040

LINE #	DESCRIPTION	SCREEN	SOURCE
	Name, Address, and SSN/ITIN	1	
1-5	Filing status	1	
6	Exemptions	2	
7	Wages, Salaries, Tips, etc.	W2; 3	W-2
8a	Taxable Interest	INT; 3; K1F; K1P; K1S	1099-INT
8b	Tax Exempt Interest	INT; 3; K1 F; K1P; K1S	1099-INT
9a	Ordinary Dividends	DIV; 3; K1 F; K1P; K1S	1099-DIV
9b	Qualified Dividends	DIV; 3; K1 F; K1P; K1S	1099-DIV
10	Taxable Refunds, Credits, or Offsets of State and Local Income Taxes	3; 99G	1099-G
11	Alimony Received	3	
12	Business Income (Loss)	C	1099-MISC
13	Capital Gain (Loss)	8949;D; D2; DIV; HOME	1099-B
14	Other Gains (Loss)	4797; 4562	1099-S
15a	IRA Distributions	1099; 3	1099-R
15b	Taxable Amount of IRA Distributions	1099; 3	1099-R
16a	Pensions and Annuities	1099; 3	1099-R
16b	Taxable Amount of Pensions and Annuities	1099; 3	1099-R
17	Rental Real Estate, Royalties, Partnerships, etc.	E; K1P; K1S; K1F; 4835	1099-MISC; K1
18	Farm Income (Loss)	F	
19	Unemployment Compensation	99G; 3	1099-G
20a	Social Security Benefits	SSA; 3	1099-SSA
20b	Taxable Amount of Social Security Benefits	SSA	1099-SSA
21	Other Income	3; 99M; NOL; W2G; 2555	1099-C; 1099-A
23	Educator Expenses	4	
24	Certain Business Expenses	2106	
25 & 36	Health Savings Account Deduction (HSA & MSA)	8889; 8853	*may affect line 21
26	Moving Expenses	3903	
27	Deductible part of Self-Employment Tax	Automatic; C; F; SE	
28	Self-employed SEP, Simple, and Qualified Plans	SEP; 4	
29	Self-Employed Health Insurance Deduction	SEHI; 4; C; F	
30	Penalty on Early Withdrawal of Savings	INT; 4	1099-INT
31a	Alimony Paid	4	
31b	Alimony Recipient's SSN	4	
32	IRA Deduction	IRA; 4; 8606; ROTH	5498
33	Student Loan Interest Deduction	4	
34	Reserved		
35	Domestic Production Activities Deduction	8903	K1

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LINE #	DESCRIPTION	SCREEN
39a	Over 65 or Blind	1
39b	Spouse Itemizes on a Separate Return	A
40	Itemized or Standard Deductions	A
42	Exemptions	Automatic; 2
44	(a) Tax from 8814 (b) Tax from 4972 (c) Other	8814; 4972; 5
45	Alternative Minimum Tax	Automatic; 6251
46	Excess Advance Premium Tax Credit Repayment	8962
48	Foreign Tax Credit	INT; DIV; 5; 1116
49	Credit for Child and Dependent Care Expenses	2; 2441
50	Education Credits	8863; 2
51	Retirement Savings Contributions Credit	Automatic; 8880
52	Child Tax Credit	Automatic; 2; 8812
53	Residential Energy Credit	5695
54	Credits from (a) Form 3800, (b) Form 8801, (c) Other Credit	3800; 8801; R; 5
57	Self-Employment Tax	Automatic; SE; C; F
58	Unreported SS and Medicare Tax – (a) Form 4137 (b) Form 8919	4137; 8919
59	Additional tax on IRAs, other qualified retirement plans, etc.	1099; 5329
60a	Household Employment Taxes	H
60b	First-time Homebuyer Credit Repayment	HOME
61	Health Care: Individual Responsibility	HC; 8965
62	Taxes from (a) Form 8959 (b) Form 8960 (c) Other	8959; 8960; 5
64	Federal Income Tax Withheld	W2; 1099; 5
65	2017 Estimated Tax Payments and Amount Applied from 2016 Return	ES
66a	Earned Income Credit (EIC)	2; EIC; 8867
66b	NonTaxable Combat Pay Election	W2
67	Additional Child Tax Credit	Automatic; 2; 8812
68	American Opportunity Credit	8863
69	Net Premium Tax Credit	8962
70	Amount Paid with Request for Extension to File	EXT
71	Excess Social Security and Tier 1 RRTA Tax Withheld	W2; 5
72	Credit for Federal Tax on Fuels	4136
73	Credits from (a) Form 2439 (b) Reserved (c) Form 8885 (d) Other	2439; 5; 8885
76a	Amount to be Refunded	DD; 8888
77	Amount to be Applied to 2018 Estimated Tax	ES
78	Amount you Owe	PMT
79	Estimated Tax Penalty	Automatic; 2210; 5; 1
	PIN Signature and Date	PIN
	Paid Preparer Data /Third Party Designee	1; PREP
	Preparer Signature Date	Automatic; PRNT

