

# Navigating TaxSlayer

Form or Topic	Keyword	1040 View	Navigation to Data Entry Screen	4012 Pg
<b>982</b> Reduction of Tax Attributes (if extended)	98	21	Income>Other Income>Cancellation of Debt Form 1099-C, Form 982	EXT-3
<b>1040-ES</b> Estimated Tax Payments	1040	N/A	Payments & Estimates>Vouchers for Next Year's Estimated Payments	H-32
<b>1040-X</b> Amended Return	N/A	N/A	Select 2017 Amended Return Section from side menu or create prior year return	M-1
<b>1095-A</b> Health Insurance	N/A	46/61/69	Select Health Insurance Section from side menu>Follow screens to Advanced Premium Tax Credit	H-24
<b>1098</b> Mortgage Interest Statement	1098	40	Deductions>Itemized Deductions>Mortgage Interest and Expenses>Mortgage Interest Reported on Form 1098	F-7
<b>1098-E</b> Student Loan Interest	1098	33	Deductions>Adjustments>Student Loan Interest Deduction	E-8
<b>1098-T</b> Tuition Statement	1098	34/50	Deductions>Credits Menu>Education Credits	Tab J
<b>1099-A</b> Acquisition or Abandonment	Capital	12/21/2013	Income>Capital Gain and Losses>Sale of Main Home Worksheet or use Capital Gains and Loss Items	EXT-2
<b>1099-B</b> Proceeds from Broker and Barter Exchange	10	13	Income>Capital Gain and Losses>Capital Gain and Loss Items	D-22
<b>1099-C</b> Cancellation of Debt	-C or CANC	21	Income>Other Income>Cancellation of Debt Form 1099-C, Form 982	D-63
<b>1099-DIV</b> Dividends	D	9	Income> click Income from Federal Section>Interest and Dividends> Interest or Dividend Income	D-11
<b>1099-G</b> State Tax Refund	G	10	Income>State and Local refunds	D-12
<b>1099-G</b> Unemployment Compensation	10,UN	19	Income>Unemployment Compensation	D-3
<b>1099-INT</b> Interest Income	INT	8	Income>Interest and Dividends>Interest or Dividend Income	D-7
<b>1099-INT Box 8</b> Tax Exempt Interest	INT	8b	Income>Interest and Dividends>Tax-Exempt Interest	D-9
<b>1099-INT</b> Box 9, Private Activity Bond Interest (PAB)	6251	45	Other Taxes>Alternative Minimum Taxes>Interest from specified private activity bonds exempt from the regular tax	D-8
<b>1099-K</b> Payment Card and Third Party...	C	12	Income>Profit or Loss from a Business>Add or edit a Schedule C>Income (include in gross receipts or sales)	D-13
<b>1099-LTC</b>	8853	N/A	Search for Form 8853 and scroll to Long term Care Section	D-53
<b>1099-MISC</b> Miscellaneous Income	MIS	N/A	Income>Form 1099-MISC	D-14
<b>1099-OID</b> Original Issue Discount	INT	8	Treat the same as 1099-INT	D-8
<b>1099-Q</b> Payments from Education Programs	N/A	21	If not taxable, do not enter; if taxable, then out of scope	J-2

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## Navigating TaxSlayer (Cont.)

Form or Topic	KeyWord	1040 View	Navigation to Data Entry Screen	4012 Pg
<b>1099-QA</b> Distributions from ABLE Accounts	N/A	21	If not taxable, do not enter; if taxable, then out of scope	D-53
<b>1099-R</b> IRA Distribution	-R	15	Income>IRA/Pension Distributions> Add or Edit a 1099-R	D-34
<b>1099-R</b> Pension Distributions	-R	16	Income>IRA/Pension Distributions> Add or Edit a 1099-R	D-34
<b>1099-R</b> Retirement	-R	16	Income>IRA/Pension Distributions> Add or Edit a 1099-R	D-34
<b>1099-S</b> Proceeds from Real Estate Transaction	CAP	13	Income>Capital Gain and Losses>Capital Gains and Loss Item	D-30
<b>1099-SA</b> HSA	HSA	25	Deductions>Adjustments>Health Savings Account Form 8889	D-3
<b>2120</b> Multiple Support Declaration	N/A	N/A	Not in TaxSlayer, take exemption, keep form in TP files	Pub 17
<b>4852</b> Substitute for Form W-2	W2	7	Income>Wages>Add a W-2>This is a substitute W-2	D-4
<b>4852</b> Substitute for Form 1099-R	495	15	Income>IRA/Pension Distributions>Add a 1099-R>Check here if this is a substitute 1099-R	D-34
<b>CSA 1099-R</b> Civil Service Annuity Paid	-R	16	Income>IRA/Pension Distributions>Add or Edit a 1099-R	D-38.2
<b>CSF 1099-R</b> Statement of Survivor Annuity Paid	-R	16	Income>IRA/Pension Distributions>Add or Edit a 1099-R	D-38.2
<b>K-1</b> Beneficiary's (or Partner's) Share of Income	K	N/A	Income>Other Income>K-1 Earnings	D-47
<b>K-1</b> Royalty income		17	Income>Other Income>K-1 Earnings	D-50
<b>RRB 1099</b> Railroad Retirement Benefits (Tier 1 blue form)	RR	20b	Income>IRA/Pension Distributions>Social Security Benefits/RRB-1099	D-45
<b>RRB 1099-R</b> Railroad Retirement Benefits (Tier 2 green form)	RR	16	Income>IRA/Pension Distributions>RRB-1099-R	D-44
<b>SSA-1099</b> Social Security Benefits	SSA	20	Income>IRA/Pension Distributions>Social Security Benefits/RRB-1099	D-45
<b>W-2</b> Wages & Salaries	W	7	Income>Wages and Salaries	D-4
<b>W-2G</b> Gambling Winnings	W2G	21	Income>Other Income>Gambling Winnings	D-53
<b>Alimony Paid</b>	ALIM	31	Deductions>Adjustments> Alimony Paid	E-1, E-6
<b>Alimony Received</b>	ALIM	11	Income>Alimony Received	E-6
<b>Amended Return</b>	N/A	N/A	2017 Amended Return Section from side menu (Tab M)	M-1
<b>American Opportunity Credit</b>	1098	50	Deductions>Credits>Education Credits	J-4
<b>Annuity Calculator, Simplified Method or Public Safety Officer Exclusion</b>	-R	16	Income>IRA/Pension Distributions>Add or edit a 1099-R>Click here for options	D-37
<b>Attach a PDF to the Return</b>	CAP	13	Income>Capital Gain and Losses>PDF Attachments	D-22
<b>Basis in Traditional IRA</b>	8606	15	N/A	D-35
<b>Brokers Statements</b>	N/A	N/A	See appropriate 1099	

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Form or Topic	KeyWord	1040 View	Navigation to Data Entry Screen	4012 Pg
<b>Business Expenses</b>	<i>C or SCHEDULE C</i>	12	Income>Profit or Loss From A Business>Add a Schedule C Income from Business>General Expenses, Car And Truck Expenses, or Other Expenses	D-20
<b>Business Income</b>	<i>C or MISC (for 1099-MISC)</i>	12	Income>Profit or Loss from a Business	D-13
<b>Cancellation of Debt</b>	<i>CAN</i>	21	Income>Other Income>Cancellation of Debt	D-63
<b>Capital Gains</b>	<i>CAP</i>	13	Income>Capital Gains and Losses	D-23
<b>Capital Gains Distributions</b>	<i>INT or DIV</i>	9	Income>Interest or Dividend Income>Interest or Dividend Income>Dividend Income>Capital Gain to Schedule D	D-11
<b>Capital Loss Carryforward</b>	<i>CAP</i>	13	Income>Capital Gains and Losses>Other Capital Gains Data (including Capital Loss Carryover)	D-22
<b>Charitable Distribution from IRA</b>	<i>-R</i>	15	Income>IRA/Pension Distribution>Add or edit 1099-R>Subtract distribution that was sent directly by trustee to charity from Box 1 and enter the difference in	D-43
<b>Charitable Gift Annuity</b>	<i>-R</i>	15	Income>IRA/Pension Distribution>Add or edit 1099-R <b>AND</b> Income>Capital Gains and Losses	D-42
<b>Charitable Donations</b>	<i>CHA</i>	40	Deductions>Itemized Deductions>Gifts to Charity	F-4, F-7
<b>Child and Dependent Care Expenses</b>	<i>2441</i>	49	Deductions>Credits>Child and Dependent Care Credit	G-5
<b>Child Tax Credit</b>	<i>N/A</i>	N/A	Completed automatically if Dependent Section properly completed	G-12
<b>Conversion of Traditional IRA to Roth IRA</b>	<i>-R, 8606</i>	15	Income>IRA/Pension PLUS Form 8606	D-39
<b>Credit for the Elderly or Disabled</b>		54	Deduction>Credits>Credit for the Elderly or Disabled	G-14
<b>Deceased Taxpayer</b>	<i>PER plus 1310</i>	N/A	Personal Information>Check here if Taxpayer is deceased. <b>PLUS</b> complete Form 1310 if person filing the return is other than spouse (Miscellaneous Forms>Claim a Refund Due to a Deceased Taxpayer).	K-12
<b>Direct Deposit/Direct Debit</b>	<i>N/A</i>	N/A	E-File Section from side menu>Federal Return Type, State Return Type. Then enter Taxpayer Bank Account	K-1, K-14
<b>Dividend Income</b>	<i>D</i>	9a	Income >Interest and Dividends>Interest or Dividend Income	D-10
<b>Donations to Charity</b>	<i>CHA</i>	40	Deductions>Itemized Deductions>Gifts to Charity	F-4, F-7
<b>Early Withdrawal Penalty (not on 1099-INT)</b>	<i>EARL</i>	30	Deductions>Adjustments> Penalty on Early	

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Form or Topic	KeyWord	1040 View	Navigation to Data Entry Screen	4012 Pg
Education Expenses	<i>EDUCA, 886</i>	34/50	Deductions >Credits Menu>Education Credits	Tab J
Educator Expenses	<i>EDUCA</i>	23	Deductions>Adjustments> Educator Expenses	E-2
Elderly or Disabled Credit	<i>ELD</i>	54	Deductions>Credits>Credit for the Elderly or Disabled Schedule R	G-14
Energy Credits	<i>ENER</i>	53	Deductions>Credits>Resident Energy Credit	EXT-7
Estimated Tax Payments for the tax year	<i>FED or PAY</i>	65	Payments & Estimates>Federal Estimated Payments	H-32
Estimated Payment Vouchers Federal State	<i>VOU STAT</i>	N/A	Payments & Estimates>Vouchers for Next Year's Estimated Payments	H-32
Exempt Interest	<i>INT</i>	8b	Income>Interest & Dividends>Interest or Dividend Income>Tax Exempt Interest Income Form 1099-INT, Box 8 or Form 1099-DIV, Box 10	D-9
Extension, Filing for	<i>EXTE</i>	N/A	Miscellaneous Forms>Application for Extension	M-7
First Time Home Buyer Credit (Repayment)	<i>FIR</i>	60b	Other Taxes>First-time Homebuyer Repayment	H-1
Foreign Tax Credit	<i>1116</i>	48	Deductions>Credits>Foreign Tax Credit	G-2
<b>Gambling Losses</b>	<i>MISC</i>	40	Deductions>Itemized Deductions> Miscellaneous Deductions> Gambling losses to the extent of gambling winnings	F-8
Gambling Winnings	<i>W2G or</i>	21	Income >Other Income>Gambling Winnings	D-53
Grants and Scholarships	<i>OT or OTHER</i>	7	Income>Other Income>Other compensation> Scholarships and Grants	J-6
Health Savings Accounts	<i>HSA</i>	25	Deductions>Adjustments> Health Savings Account	E-3
Household Employee Income (no W-2)	<i>OT or OTHER</i>	7	Income>Other Income>Other Compensation> Household Employee Income	D-53
Identity Theft PIN	<i>PIN</i>	N/A	Miscellaneous Forms>IRS Identification Pin	P-2
Injured Spouse	<i>INJ</i>	N/A	Miscellaneous Forms>Injured Spouse Form	P-3
Interest Income	<i>INT</i>	8	Income>Interest and Dividends> Interest or Dividend Income>Interest Income, Form 1099-INT	D-7
Interest Income not on a Form	<i>INT</i>	8	Income>Interest and Dividends> Interest or Dividend Income>Interest Income, Form 1099-INT	D-7
Investment Management Fees	<i>MIS</i>	40	Deductions>Itemized Deductions> Miscellaneous Deductions> Investment Fees and Expenses	F-8
IRA, Basis in	<i>8606</i>	N/A	N/A	D-35
IRA Contributions (Traditional IRA)	<i>IRA</i>	32	Deductions>Adjustments>IRA Deduction	E-7

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## Navigating TaxSlayer (Cont.)

Form or Topic	KeyWord	1040 View	Navigation to Data Entry Screen	4012 Pg
IRA Contributions (Roth IRA)	IRA	51	Deductions>Credits>Retirement Savings Credit>Any Current Year Roth IRA Contributions	G-10
IRA Conversion to Roth	-R, 8606	15	N/A	D-39
IRA Distributions	-R	15	Income>IRA/Pension Distributions>Add or Edit a 1099-R	D-35
IRA Qualified Charitable Distribution (Not a Charitable Gift Annuity)	-R	15	Income>IRA/Pension Distribution>Add or edit 1099-R>Subtract distribution that was sent directly by trustee to charity from Box 1 and enter the difference in Box 2a. Go to Nontaxable Distributions and check the "Check here to mark this as a Qualified Charitable Distribution (QCD) on your return." Box	D-41
IRA Rollover	-R	15	Income>IRA/Pension Distributions> Add or Edit a 1099-R check the box "Check here if all/part of the distribution was rolled over, and enter the rollover amount."	D-39
ITIN, Application for	N/A	N/A	Miscellaneous Forms>Application of ITIN	L-3
Jury Duty Pay	N/A	21	Income>Other Income>Other Inc. Not Reported Elsewhere	D-53
Jury Duty Paid to the Employer	J	36	Deductions>Other Adjustments>Jury Duty Pay	E-1
Lump-Sum Social Security Benefit	SSA	20	Income>IRA/Pension Distributions>Social Security Benefits/ RRB-1099>Begin Worksheet	D-46
<b>Long-term Care Benefits</b>	<b>8853</b>	<b>N/A</b>	<b>In 8853, scroll to Long Term Care section</b>	D-53
Management Fees (Investment)	MIS	N/A	Deductions>Itemized Deductions>Miscellaneous Deductions>Investment Fees and Expenses	F-8
Medical and Dental Expenses	MED	40	Deductions>Itemized Deductions> Medical and Dental Expenses	F-5
Medicaid Waiver Payment on 1099-Misc	N/A	N/A	See page D-62	D-62
Medicaid Waiver Payments on W-2	W	7/21	Income > Wages and salaries Form W-2 and enter the amount in the "Medicaid Waiver Payment in Box 1" to be subtracted on line 21.	D-62
Mileage for Charitable Travel	CHA	40	Deductions>Itemized Deductions>Gifts to Charity>Noncash Gifts to Charity	F-7
Mileage for Medical Travel	MED	40	Deductions>Itemized Deductions> Medical and Dental Expenses	F-6
Mortgage Insurance Premiums (if extended)	MORT	40	Deductions>Itemized Deductions>Mortgage Interest and Expenses> Private Mortgage Insurance (PMI) Deduction	F-7

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Form or Topic	KeyWord	1040 View	Navigation to Data Entry Screen	4012 Pg
Mortgage Interest and Points Paid	MORT	40	Deductions>Itemized Deductions> Mortgage Interest and Expenses> Mortgage Interest Reported on Form 1098	F-7
Mortgage Interest Paid—not on Form 1098	MORT	40	Deductions>Itemized Deductions> Mortgage Interest and Expenses> Mortgage Interest Not Reported on Form 1098	F-7
Noncash Donations that total \$500 or less	CHA	40	Deductions>Itemized Deductions>Gifts to Charity>Non-Cash Gifts to Charity	F-7
Noncash Donations that total more than \$500	CHA	40	Deductions>Itemized Deductions> Gifts to Charity>Non-Cash Donations (more than \$500)	F-7
OID Interest	INT	8	Income>Interest and Dividends>Interest or Dividend Income <b>as regular interest</b>	D-8
Other Income (prizes, jury duty, etc.)	N/A	21	Income>Other Income>Other Inc. Not Reported Elsewhere	D-53
PDF, Attaching	N/A	13	Income>Capital Gain and Losses>PDF Attachments	D-22
Pension Distributions	-R	16	Income>IRA/Pension Distributions> Add or Edit a 1099-R	D-33
Personal Property Taxes	Proper	40	Deductions>Itemized Deductions> Taxes You Paid	F-6
PIN, Identity Theft	PIN	N/A	Miscellaneous Forms>IRS Identification Pin	PJ-2
Private Activity Bond interest (PAB)	6251	45	Other Taxes and Payments>Alternate Minimum Tax>Interest from specified private activity bonds exempt from the regular tax	D-8
Prizes and Awards	N/A	21	Income>Other Income>Other Inc. Not Reported Elsewhere	D-53
Public Safety Officer Exclusion	-R	16	Income>IRA/Pension Distributions>Add or edit 1099-R>Click here for options	D-36, D-43
Real Estate Taxes	MORT	40	Deductions>Itemized Deductions> Mortgage Interest and Expenses> Mortgage Interest Reported on Form 1098	F-6
Refund, Apply to Next Year	PAY	77	Payments & Estimates>Apply Overpayment to Next Year's Taxes	H-32
Refunds of State and Local Income Tax (if reportable)	G [box 2]	10	Income>State and Local Refunds	D-12
Repayment of Previously Taxed Income (including unemployment)	N/A	19	Income>Unemployment>Repayment	D-3
Residential Energy Credit (if extended)	ENER,RES I	53	Deductions>Credits>Residential Energy Credit	EXT-7
Retirement Savings Credit	RETI	51	Deductions>Credits>Retirement Savings Credit	G-9

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<b>Reverse Mortgage Income</b>			Income is neither taxable nor reportable.	
<b>Reverse Mortgage Interest</b>	<i>MORT</i>	40	Interest is deductible ONLY when actually paid—usually when loan is paid in full. Deduction subject to home equity loan limits (<\$100,000).	F-7
<b>Roth IRA Contributions</b>	<i>IRA</i>	51	Deductions>Credits>Retirement Savings Credit>Any Current Year Roth IRA Contributions	G-10
<b>Royalties (simple royalties with no associated expenses)</b>	<i>SC</i>	17	Income>Rents and Royalties (Sch E)	D-51
<b>Royalties from Services</b>	<i>MISC</i>	21	Income>Form 1099-Misc>Add a Form 1099-MISC>Box 7 Nonemployee compensation	D-15
<b>Sale of Stock</b>	<i>CAP</i>	12	Income>Capital Gain and Losses	D-22
<b>Sale of Main Home</b>	<i>CAP</i>	12	Income>Capital Gain and Losses> Sale of Main Home Worksheet or use Capital Gains and Loss Items	D-28
<b>Sales Tax Deduction</b>	<i>SALE or TAX</i>	40	Deductions>Itemized Deductions> Taxes You Paid	F-6
<b>Schedule C</b>	<i>SC</i>	12	Income>Profit or Loss from a Business	D-13
<b>Scholarships and Grants, taxable</b>	<i>OT or OTHER</i>	7	Income>Other Income>Other compensation> Scholarships and Grants	J-6
<b>Self-employment Income</b>	<i>C</i>	12	Income>Profit or Loss from a Business	D-13
<b>Seller-financed Mortgage Interest Paid</b>	<i>MORT</i>	40	Deductions>Itemized Deductions> Mortgage Interest and Expenses> Mortgage Interest Not Reported on Form 1098	D-8
<b>Seller-financed Mortgage Interest Received</b>	<i>INT</i>	8	Income>Interest and Dividends> Interest or Dividend Income>Seller Financed Interest Income	D-10
<b>Simplified Method</b>	<i>-R</i>	16	Income>IRA/Pension Distributions> Add or edit a 1099-R>Click here for options	D-37, D-39
<b>Simplified Method after Death of All Beneficiaries</b>	<i>MISC</i>	40	Deductions>>Itemized Deductions> Miscellaneous Deductions> unrecovered investment in pension	F-8
<b>Social Security Benefits</b>	<i>SSA</i>	20	Income>IRA/Pension Distributions> Social Security Benefits/ RRB-1099	D-46
<b>State and Local Tax Refund Worksheet</b>	<i>G [box 2]</i>	10	Income>State and Local Refunds	D-12
<b>State and Local Taxes Paid</b>	<i>STAT</i>	40	Deductions>Itemized Deductions> Taxes You Paid> Additional State and Local Income Tax	F-6
<b>Stock Sales</b>	<i>CAP</i>	12	Income>Capital Gain and Losses	D-22
<b>Student Loan Interest</b>	<i>STU or LOA</i>	33	Deductions>Adjustments> Student Loan Interest Deduction	E-8
<b>Substitute W-2</b>	<i>W</i>	7	Income>Wages>Add a W-2>This is a substitute W-2	D-4
<b>Taxable Refund Worksheet</b>	<i>G [box 2]</i>	10	Income>State and Local Refunds	D-12

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<b>Tax Exempt Interest and Dividends</b>	<i>INT</i>	8	Income>Interest and Dividends> Interest or Dividend Income>Tax Exempt Interest Income	D-9,
<b>Taxes Paid, Federal Estimated</b>	<i>FED or PAY</i>	65	Payments & Estimates>Federal Estimated Payments for 2017	H-32
<b>Taxes Paid, State and Local</b>	<i>STAT</i>	40	Deductions>Itemized Deductions> Taxes You Paid> Additional State and Local Income Tax	F-6
<b>Tuition and Fees Adjustment (if extended)</b>	<i>TUI</i>	34/50	Deductions>Adjustments> Tuition and Fees Deduction	EXT-6
<b>Unemployment Compensation</b>	<i>UN</i>	19	Income>Unemployment Compensation	D-3
<b>Unemployment Compensation Repayment—Same Year as Benefit Received</b>	<i>G</i>	19	Income>Unemployment compensation	D-3
<b>Unemployment Compensation Repayment—Year after Benefits Received—greater than \$3,000</b>	<i>MIS</i>	40	Deductions>Itemized Deductions>Miscellaneous Deductions>Repayment under claim of right (if greater than \$3000)	F-8
<b>Unemployment Compensation Repayment—Year after Benefits Received—less than \$3,000</b>	<i>MIS</i>	40	Deductions>Itemized Deductions>Miscellaneous Deductions>Add Additional	F-8
<b>Unrecovered Investment in Pension</b>	<i>MIS</i>	40	Deductions>Itemized Deductions>Miscellaneous Deductions>Unrecovered investment in pension	F-8
<b>Volunteer Expenses</b>	<i>CHA</i>	40	Deductions>Itemized Deductions>Gifts to Charity	F-8
<b>Vouchers for Estimated Payments Federal State</b>	<i>VOU</i>	N/A	Payments & Estimates>Vouchers for NextYear's Estimated Payments	H-32
<b>Wages &amp; Salaries</b>	<i>W</i>	7	Income>Wages and Salaries	D-4
<b>W-7 Application for ITIN</b>	<i>N/A</i>	N/A	Miscellaneous Forms>Application for ITIN	L-3
<b>Withholding not on another form</b>	<i>WITH</i>	N/A	Payments & Estimates>Other Fed (or State) Withholding	H-32
<b>Work Release Income</b>	<i>N/A</i>	21	Income>Other Income>Other Compensation> Prisoner Earned Income.	D-5

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