

2026 Substitute Forms Assignment List (03-18-2026)

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Ty Taylor	Monica Smith	Gurinder Sidhu
Policy Reviewer: Amanda Mesa	Policy Reviewer: Amanda Mesa	Policy Reviewer: Amanda Mesa
Technical Reviewer: Susan Fargo Back up: Gurinder Sidhu	Technical Reviewer: Susan Fargo Back up: Ty Taylor	Technical Reviewer: Susan Fargo Back up: Monica Smith
*OVERLAYS:	*OVERLAYS:	*OVERLAYS:
Sch P (540) AP	540NR AP	Sch CA (540) AP
Sch W-2 AP (one-step)	540 2EZ AP	540 AP
5805 AP (one-step)	3514 AP	Sch D (540) AP
Schedule X AP (one-step)	565/568 SubScan (one-step)	541-ES Scan (2027) (one-step)
100/100S/100W/100X SubScan (one-step)	Sch K-1 (565/568) SubScan (one-step)	3539/3586/3893 Scan (one-step)
100-ES Scan (2027) (one-step)	3519 Scan (one-step)	540-ES Scan (2027) (one-step)
Sch K-1 (100S) SubScan (one-step)	3537/3588 Scan (one-step)	3563/3843 Scan (one step)
3582/3582-X Scan (one-step)	3536 Scan (2027) (one-step)	3522 Scan (2027) (one-step)
3538/3587 Scan (one-step)		Master Substitute Overlay (one-step review)
FORMS REVIEW SHEETS:	FORMS REVIEW SHEETS:	FORMS REVIEW SHEETS:
		Master Substitute (one-step review)
FTB PUB:	FTB PUB:	FTB PUB:
	1098	
	1098 & Assembly (one-step)	
FORMS:	FORMS:	FORMS:
100 SubScan (one-step)	540 NR AP	540 AP
100S SubScan (one-step)	540 2EZ AP	541-ES Scan (2027) (one-step)
100W SubScan (one-step)	565 SubScan (one-step)	540-ES Scan (2027) (one-step)
100X SubScan (one-step)	568 SubScan (one-step)	
100-ES Scan (2027) (one-step)		
FTB:	FTB:	FTB:
3582 Scan (one-step)	3514 AP	3563 Scan (one step)
3582-X Scan (one-step)	3519 Scan (one-step)	3843 Scan (one step)
3538 Scan (one-step)	3537 Scan (one step)	3522 Scan (2027) (one-step)
3587 Scan (one-step)	3588 Scan (one step)	3539 Scan (one-step)
5805 AP (one-step)	3536 Scan (2027) (one-step)	3586 Scan (one-step)
		3893 Scan (2027) (one-step)
SCHEDULES:	SCHEDULES:	SCHEDULES:
Sch K-1 (100S) SubScan (one-step)	Schedule K-1 (565) SubScan (one-step)	Sch CA (540) AP
Schedule W-2 (AP) (one-step)	Schedule K-1 (568) SubScan (one-step)	Sch D (540) AP
Sch X AP (one-step)		
Sch P (540) AP		
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