**ALABAMA DEPARTMENT OF REVENUE**

**TEST SCENARIOS FOR THE 2021**

**ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 1**

**FORMS REQUIRED:**

Form 40NR: Individual Income Tax Return – NonResident Only

Schedule A: Itemized Deductions

Schedule B: Interest and Dividend Income

Schedule D: Net Profit or Loss

Schedule E: Supplemental Income and Loss

Schedule OC: Other Available Credits

Schedule CP: Composite Payments

Schedule W-2: Wages, Salaries, Tips, etc.

Form 4952A: Investment Interest Expense Deduction

2210AL: Underpayment of Estimated Tax by Individuals

**OTHER INFORMATION ABOUT THE TEST:**

**Payment Due Return**

**Taxpayer Name – Occupation – SSN**

**Name:** Luke M. Happy

**Occupation:** Historian

**SSN:** 400-92-9401

**Address:** 1634 Straight Lane, Baltimore, MD 21239

**Complete all fields with keying dots for sections requested – if applicable.**

**Form 40NR: Alabama Individual Income Tax Return - NonResident**

**How/What to Complete the Form**

**Filing Status/Exemptions Section:**

**Filing Status:** Single

**Income and Adjustments Section:**

Complete Lines 5 – 12

**Deductions Sections:**

Complete Lines 13a – 17

Choose Itemized Deduction for Line 13a

**Tax Section:**

Complete Lines 18 – 20

**Payment Section:**

Compete Lines 21, 22, 23, 26, 28

Complete Schedule CP: Composite Payments

**Amount You Owe Section:**

Complete Lines 29 – 30

**Overpaid Section:**

Not completed – Payment Return

**Refund Section:**

Not completed – Payment Return

**Authorization Section:**

Check the “authorization checkbox”

Complete Primary Tax Information

Complete the Paid Preparer’s Use Only Section

**Part 1: Other Income Section:**

Complete Lines 1, 2, 5, 6 and 9

Complete Schedule B

Complete Schedule D

Complete Schedule E

**Part 2: Adjustments to Income Section:**

Complete Lines 1, 2, 6, 7 and 8

**Part 3: Other Adjustments:**

Complete Lines 3 – 6

**Part 4: Federal Income Tax Deduction:**

Complete Lines 4, 6 and 7

**Part 5: Dependents Section:**

No Dependents

**Part 6: General Information:**

Complete Lines 1 – 6

Did you file a return with that state for 2021? Yes

If married, did your spouse receive a separate income for 2021? Not completed

If yes, is your spouse filing a separate Alabama return? Not completed

Did you file an Alabama return for previous year? Yes

**Drivers License Info Section:**

Complete Section for Primary Taxpayer

**Schedule Information**

**Schedule W-2: Wages, Salaries, Tips, etc.**

Complete 4 entries

Entries should be “AL” and “OS”

**Schedule OC: Other Available Credits**

Complete Section A.

Complete Section B, Part H. Veterans Employment Act - Business Startup Expense Credit. Complete Section B, Part J. Qualified Irrigation System/Reservoir System Tax Credit.

Type of Credit. Select Purchase or conversion of irrigation system credit and Pro-rata share of credit

Complete Section B, Part N. 2013 Alabama Historic Rehabilitation Tax Credit.

Complete Section B. Part O. Career – Technical Dual Enrollment Credit

Complete Section B. Part P. Investment Credit – Alabama Jobs Act.

Complete Section B. Part Q. Port Credit – Alabama Renewal Act Credit.

Complete Section B. Part R. Alabama Renewal Act – Growing Alabama Credit.

Complete Section B. Part S. Apprenticeship Tax Credit.

Complete Section B. Part U. Railroad Modernization Act of 2019.

Complete Section C.

Complete Section D. Add ten credit carryforwards

Complete Section E.