**ALABAMA DEPARTMENT OF REVENUE**

**TEST SCENARIOS FOR THE 2021**

**ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 2**

**FORMS REQUIRED:**

Form 40: Individual Income Tax Return

Schedule B: Interest and Dividend Income

Schedule DC: Donation Check-Offs

Schedule DS: Dependents Schedule

Schedule HOF: Head of Family Schedule

Schedule AATC: Alabama Accountability Tax Credit

Schedule AAC: Alabama Adoption Tax Credit

Schedule OC: Other Available Credits

Schedule ATP: Additional Taxes & Penalties

NOL-85: Computation of Net Operating Loss

**OTHER INFORMATION ABOUT THE TEST:**

**Refund Return**

**Taxpayer Name – Occupation – SSN**

**Name:** Jacob A. Trickster

**Occupation:** Financial Advisor

**SSN:** 400-88-7402

**Address:** 1503 Ladder Road, Selma AL 36701

 **Complete all fields next to keying dots for Sections requested – if applicable**

**Form 40: Alabama Individual Income Tax Return**

**How/What to Complete the Form**

**Filing Status/Exemptions Section:**

**Filing Status:** Head of Family (with qualifying person)

**Income and Adjustments Section:**

Complete Lines 6 – 10

Complete Schedule B

**Deductions Sections:**

Complete Lines 11a – 15

Choose Standard Deduction for Line 11b

**Tax Section:**

Complete Lines 16 – 21

Schedule OC checkbox checked

Alabama Democratic Party $none checked

Alabama Republican Party $1 checked

**Payment Section:**

Compete Lines 23, 25, 27 and 29

Complete Schedule OC, Section F

**Amount You Owe Section:**

Not completed – Refund Return

**Overpaid Section:**

Complete Lines 32 – 33

**Donations Section:**

Complete Line 34

Complete Schedule DC Line 1a – 1r

**Refund Section:**

Complete Line 35

For Direct Deposit Checkbox

**Part 1: Other Income Section:**

Complete Lines 2, 4a, 4b, 5a, 5b, 7 and 9

**Part 2: Adjustments to Income Section**

Complete Lines 4, 5, 8 and 16

**Part 3: Dependents Section**

Complete Line 1 – 2

Complete Schedule DS: Dependents Schedule

Number of Dependents: 4

**Part 4: General Information Section:**

Complete Lines 1 – 5

Did you file an Alabama income tax return for the previous year? No

Do you have income reported on Federal, but not Alabama? No

**Part 5: Direct Deposit Section**

Complete Lines 1 – 4

Checking

Is this refund going to outside United States? No

**Drivers License Info Section:**

Complete Section for Primary Taxpayer

**Authorization Section:**

Check the “authorization checkbox”

Complete Primary Tax Information

Complete the Paid Preparer’s Use Only Section

**Schedule Information**

**Schedule ATP: Additional Taxes & Penalties**

Complete Part I, line 1

Consumer Use Tax checkbox is checked

**Schedule AATC: Alabama Accountability Tax Credit**

Complete Part I.

**Schedule AAC: Alabama Adoption Tax Credit**

Complete Part I for four children

Complete Part II.

**Schedule OC: Other Available Credits**

Complete Section A.

Complete Section B, Part K. Alabama Accountability Tax Credit – School Transfer Credit.

Complete Section B. Part M. Alabama Adoption Tax Credit.

Complete Section B. Part T. 2017 Alabama Historic Rehabilitation Tax Credit.

Complete Section C.

Complete Section E.

Complete Section F.

**NOL-85: Computation of Net Operating Loss**

Complete Part I, Part II and Part III