

**2020 Substitute Forms Program
SUPPORTED FORMS
*Required Fields**

Date	
*Software Developer Name	
*Contact Person Name	
*Contact Phone Number	
*3 digit CTP ID#	
*Product Name	

FORMS AND SCHEDULES (Check all that apply)

Refer to Publication 1098 Part I and II for complete requirements of test submissions.

INDIVIDUAL RETURN FORMS

		Substitute Forms	2D Barcode	Scannable Voucher	Absolute Position
Form 540	California Resident Income Tax Return				
Form 540 2EZ	California Resident Income Tax Return				
Form 540NR	California Nonresident or Part-Year Resident Income Tax Return				
Schedule CA (540)	California Adjustments – Residents				
Schedule CA (540NR)	California Adjustments – Nonresidents or Part-Year Residents				
Schedule D (540)	California Capital Gain or Loss Adjustment				
Schedule D (540NR)	California Capital Gain or Loss Adjustment				
Schedule P (540)	Alternative Minimum Tax and Credit Limitations – Residents				
Schedule P (540NR)	Alternative Minimum Tax and Credit Limitations – Nonresidents and Part-Year Residents				
Form 570	Nonadmitted Insurance Tax Return				
Form 587	Nonresident Withholding Allocation Worksheet				
Form 588	Nonresident Withholding Waiver Request				
Form 589	Nonresident Reduced Withholding Request				
Form 590	Withholding Exemption Certificate				
Form 590P	Nonresident Withholding Exemption Certificate for Previously Reported Income				

INDIVIDUAL RETURN FORMS

		Substitute Forms	2D Barcode	Scannable Voucher	Absolute Position
Form 592	Resident and Nonresident Withholding Statement				
Form 592A	Payment Voucher for Foreign Partner or Member Withholding				
Form 592-B	Resident and Nonresident Withholding Tax Statement				
Form 592F	Foreign Partner or Member Annual Return				
Form 592-V	Payment Voucher for Resident and Nonresident Withholding				
Form 592PTE	Pass-Through Entity Annual Withholding Return				
Form 592Q	Payment Voucher for Pass-Through Entity Withholding				
Form 593	Real Estate Withholding Statement				
Form 593-V	Payment Voucher for Real Estate Withholding				
Form 3461	California Limitation on Business Losses				
Form 3503	Natural Heritage Preservation Credit				
Form 3504	Enrolled Tribal Member Certification				
Form 3506	Child and Dependent Care Expenses Credit				
Form 3507	Prison Inmate Labor Credit				
Form 3510	Credit for Prior Year Alternative Minimum Tax – Individuals or Fiduciaries				
Form 3514	California Earned Income Tax Credit				
Form 3520-PIT	Individual or Fiduciary Power of Attorney Declaration				
Form 3520-RVK	Power of Attorney Declaration Revocation				
Form 3521	Low-Income Housing Credit				
Form 3523	Research Credit				
Form 3525	Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.				
Form 3526	Investment Interest Expense Deduction				
Form 3531	California Competes Tax Credit				
Form 3532	Head of Household Filing Status Schedule				
Form 3533	Change of Address for Individuals				
Form 3533-B	Change of Address for Businesses, Exempt Organizations, Estates and Trusts				
Form 3534	Tax Information Authorization				
Form 3535	FTB 3535, Tax Information Authorization Revocation				
Form 3540	Credit Carryover and Recapture Summary				
Form 3541	Motion Picture And Television Credit				
Form 3546	Enhanced Oil Recovery Credit				
Form 3547	Donated Agricultural Products Transportation Credit				
Form 3548	Disabled Access Credit for Eligible Small Business				
Form 3551	Sale of Credit Attributable to an Independent Film				

INDIVIDUAL RETURN FORMS

		Substitute Forms	2D Barcode	Scannable Voucher	Absolute Position
Form 3554	New Employment Credit				
Form 3568	Alternative Identifying Information for the Dependent Exemption Credit				
Form 3592	College Access Tax Credit				
Form 3596	Paid Preparer's Due Diligence Checklist for California Earned Income Tax Credit				
Form 3800	Tax Computation for Certain Children with Unearned Income				
Form 3801	Passive Activity Loss Limitations				
Form 3801-CR	Passive Activity Credit Limitations				
Form 3803	Parents' Election to Report Child's Interest and Dividends				
Form 3805E	Installment Sale Income				
Form 3805P	Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts				
Form 3805V	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations				
Form 3805Z	Enterprise Zone Deduction and Credit Summary				
Form 3807	Local Agency Military Base Recovery Area Deduction and Credit Summary (LAMBRA)				
Form 3808	Manufacturing Enhancement Area Credit Summary (MEA)				
Form 3809	Targeted Tax Area Deduction and Credit Summary (TTA)				
Form 3814	New Donated Fresh Fruits or Vegetables Credit				
Form 3840	California Like-Kind Exchanges				
Form 3849	Premium Assistance Subsidy				
Form 3853	Health Coverage Exemptions and Shared Responsibility Penalty				
Form 3866	Main Street Small Business Tax Credit				
Form 3895	California Health Insurance Marketplace Statement				
Form 3885A	Depreciation and Amortization Adjustments				
Form 4197	Information on Tax Expenditure Items				
Form 5805	Underpayment of Estimated Tax by Individuals and Fiduciaries				
Form 5805F	Underpayment of Estimated Tax by Farmers and Fishermen				
Form 5870A	Tax on Accumulation Distribution of Trusts				
Form 8453	California e-file Return Authorization for Individuals				
Form 8453-OL	California Online e-file Return Authorization for Individuals				

INDIVIDUAL RETURN FORMS

		Substitute Forms	2D Barcode	Scannable Voucher	Absolute Position
Form 8453 (PMT)	California Payment for Automatic Extension and Estimate Payment Authorization for Individuals				
Form 8454	e-file Opt-Out Record for Individuals				
Form 8455	California e-file Payment Record for Individuals				
Form 8879	California e-file Signature Authorization for Individuals				
Form 8879 (PMT)	California Electronic Funds Withdrawal Payment Signature Authorization for Individuals and Fiduciaries				
Form 540-ES	Estimated Tax for Individuals				
Form 3519	Payment for Automatic Extension for Individuals				
Form 3582	Payment Voucher for Individual e-filed Returns				
Form 3582 X	Payment Voucher for Individual e-filed Amended Returns				
CA Form W-2	Wage and Tax Statement				
Schedule D-1	Sales of Business Property				
Schedule G-1	Tax on Lump Sum Distributions				
Schedule R	Apportionment and Allocation of Income				
Schedule S	Other State Tax Credit				
Schedule X	California Explanation of Amended Return Changes				
Schedule RDP	California RDP Adjustments Worksheet				

Please indicate if your software has restrictions on any of the forms above by listing the sections on the form or line numbers that you do not support.

FORMS AND SCHEDULES (Check all that apply)

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FIDUCIARY RETURN FORMS

		Substitute Forms	2D Barcode	Scannable Voucher	Absolute Position
Form 541	California Fiduciary Income Tax Return				
Schedule D	Capital Gain or Loss				
Schedule J	Trust Allocation of an Accumulation Distribution				
Schedule K-1	Beneficiary's Share of Income, Deductions, Credits, etc.				
Schedule P	Alternative Minimum Tax and Credit Limitations Fiduciaries				
Form 3885F	Depreciation and Amortization Adjustments				
Form 541-A	Trust Accumulation of Charitable Amounts				
Form 541-B	Charitable Remainder and Pooled Income Trusts				
Form 541-QFT	California Income Tax Return for Qualified Funeral Trusts				
Form 541-T	California Allocation of Estimated Tax Payments to Beneficiaries				
Form 8453-FID	California e-file Return Authorization for Fiduciaries				
Form 8453-FID (PMT)	California Payment for Automatic Extension and Estimate Payment Authorization for Fiduciaries				
Form 8455-FID	California e-file Payment Record for Fiduciaries				
Form 8879-FID	California e-file Signature Authorization for Fiduciaries				
Form 541-ES	Estimated Tax for Fiduciaries				
Form 3563	Payment for Automatic Extension for Fiduciaries				
Form 3843	Payment Voucher for Fiduciary e-filed Returns				

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FORMS AND SCHEDULES (Check all that apply)

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BUSINESS CORPORATION RETURN FORMS

		Substitute Forms	Sub-Scan Forms	Scannable Voucher	
Form 100	CA Corporation Franchise or Income Tax Return				
Form 100S	CA S Corporation Franchise or Income Tax Return				
Form 100W	CA Corporation Franchise or Income Tax Return – Water’s Edge Filers				
Schedule B (100S)	S Corporation Depreciation and Amortization				
Schedule C (100S)	S Corporation Tax Credits				
Schedule D (100S)	S Corporation Capital Gains and Losses and Built-In Gains				
Schedule H (100)	Dividend Income Deduction				
Schedule H (100S)	S Corporation Dividend Income Deduction				
Schedule H (100W)	Dividend Income Deduction – Water’s-Edge Filers				
Schedule K-1 (100S)	Shareholder’s Share of Income, Deductions, Credits, etc.				
Schedule P (100)	Alternative Minimum Tax and Credit Limitations - Corporations				
Schedule P (100W)	Alternative Minimum Tax and Credit Limitations – Water’s-Edge Filers				
Schedule QS (100S)	Qualified Subchapter S Subsidiary (QSub) Information				
Form 100WE	Water’s Edge Election				
Form 100X	Amended Corporation Franchise or Income Tax Return				
Form 2416	Schedule of Included Controlled Foreign Corporations (CFC)				
Form 2424	Water’s Edge Foreign Investment Interest Offset				
Form 3544	Assignment of Credit				
Form 3725	Assets Transferred from Corporation to Insurance Company				
Form 3726	Deferred Intercompany Stock Account (DISA) and Capital Gains Information				
Form 3802	Corporate Passive Activity Loss and Credit Limitations				
Form 3805Q	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations - Corporations				
Form 3834	Interest Computation Under the Look-Back Method for Completed Long-Term Contracts				
Form 3885	Corporation Depreciation and Amortization				
Form 5806	Underpayment of Estimated Tax by Corporations				
Form 100-ES	Corporation Estimated Tax				
Form 1115	Request for Consent for a Water's-Edge Re-Election				
Form 1117	Request to Terminate Water's-Edge Election				

BUSINESS CORPORATION RETURN FORMS

		Substitute Forms	Sub-Scan Forms	Scannable Voucher	
Form 3520-BE	Business Entity or Group Nonresident Power of Attorney Declaration				
Form 3539	Payment for Automatic Extension for Corporations and Exempt Organizations				
Form 3574	Special Election for Business Trusts and Certain Foreign Single Member LLCs				
Form 3576	Pending Audit Tax Deposit Voucher for Individuals				
Form 3577	Pending Audit Tax Deposit Voucher for Corporations				
Form 3578	Pending Audit Tax Deposit for Limited Liability Companies (LLCs)				
Form 3579	Pending Audit Tax Deposit Voucher for LPs, LLPs, and REMICs				
Form 3580	Application and Election to Amortize Certified Pollution Control Facility				
Form 3581	Tax Deposit Refund and Transfer Request				
Form 3586	Payment Voucher for Corporations and Exempt Organizations e-filed Returns				
Form 3864	Group Nonresident Return Election				
Form 8453-BE (PMT)	California Payment Authorization for Business Entities				
Form 8453-C	California e-file Return Authorization for Corporations				
Schedule 1067A	Nonresident Group Return Schedule				
Schedule 1067B	Group Nonresident Return Payment Transfer Request				

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FORMS AND SCHEDULES (Check all that apply)

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BUSINESS PARTNERSHIP and LIMITED LIABILITY COMPANY RETURN FORMS

		Substitute Forms	Sub-Scan Forms	Scannable Voucher	
Form 565	Partnership Return of Income				
Form 568	Limited Liability Company Return of Income				
Form 3832 (568)	Limited Liability Company Nonresident Members' Consent				
Form 3885L (568)	Depreciation and Amortization				
Form 3885P (565)	Depreciation and Amortization Method for Completed Long- Term Contracts				
Schedule D (565)	Capital Gain or Loss				
Schedule D (568)	Capital Gain or Loss				
Schedule EO (565)	Pass-Thru Entity Ownership (Partnership)				
Schedule EO (568)	Pass-Thru Entity Ownership (LLC)				
Schedule K-1 (565)	Partner's Share of Income, Deductions, Credits, etc.				
Schedule K-1 (568)	Partner's Share of Income, Deductions, Credits, etc.				
Form 3522	LLC Tax Voucher				
Form 3536	Estimated Fee for LLCs				
Form 3537	Payment for Automatic Extension for LLCs				
Form 3538	Payment for Automatic Extension for LPs, LLPs, and /REMICs				
Form 3587	Payment Voucher for LP, LLP, and REMIC e-filed Returns				
Form 3588	Payment Voucher for LLC e-filed Returns				
Form 8453-LLC	California e-file Return Authorization for Limited Liability Companies				
Form 8453-P	California e-file Return Authorization for Partnerships				

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BUSINESS EXEMPT ORGANIZATION RETURN FORMS

		Substitute Forms	Sub-Scan Forms		
Form 109	Exempt Organization Business Income Tax Return				
Form 199	CA Exempt Organization Annual Information Return				
Form 3500	Exemption Application				
Form 3500A	Submission of Exemption Request and Instructions				
Form 3502	Nonprofit Corporation Request for Pre-Dissolution Tax Abatement				
Form 3509	Political or Legislative Activities by Section 232701d				
Form 8453-EO	California e-file Return Authorization for Exempt Organizations				

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