

**2023 Substitute Forms  
Program Supported Forms List  
\* Required Field**

<b>Date</b>	
<b>*Software Developer Name</b>	
<b>*Contact Person Name</b>	
<b>*Contact Phone Number</b>	
<b>*3 digit CTP ID#</b>	
<b>*Product Name</b>	

<b>FORMS AND SCHEDULES (Check all that apply)</b>						
Refer to Publication 1098 Part I and II for complete requirements of test submissions.						
		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
100	CA Corporation Franchise or Income Tax Return					
100-ES	Corporation Estimated Tax					
100-WE	Water's Edge Election					
100S	CA S Corporation Franchise or Income Tax Return					
100W	CA Corporation Franchise or Income Tax Return – Water's Edge Filers					
100X	Amended Corporation Franchise or Income Tax Return					
1067A	Nonresident Group Return Schedule					
1067B	Group Nonresident Return Payment Transfer Request					
109	Exempt Organization Business Income Tax Return					
1115	Request for Consent for a Water's-Edge Re-Election					
1117	Request to Terminate Water's-Edge Election					
199	CA Exempt Organization Annual Information Return					
2416	Schedule of Included Controlled Foreign Corporations (CFC)					

		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
2424	Water's Edge Foreign Investment Interest Offset					
3461	California Limitation on Business Losses					
3500	Exemption Application					
3500A	Submission of Exemption Request and Instructions					
3502	Nonprofit Corporation Request for Pre-Dissolution Tax Abatement					
3503	Natural Heritage Preservation Credit					
3504	Enrolled Tribal Member Certification					
3506	Child and Dependent Care Expenses Credit					
3507	Prison Inmate Labor Credit					
3509	Political or Legislative Activities by Section 232701d					
3510	Credit for Prior Year Alternative Minimum Tax – Individuals or Fiduciaries					
3514	California Earned Income Tax Credit					
3519	Payment for Automatic Extension for Individuals					
3520-BE	Business Entity or Group Nonresident Power of Attorney Declaration					
3520-PIT	Individual or Fiduciary Power of Attorney Declaration					
3520-RVK	Power of Attorney Declaration Revocation					
3521	Low-Income Housing Credit					
3522	LLC Tax Voucher					
3523	Research Credit					
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.					
3526	Investment Interest Expense Deduction					
3531	California Competes Tax Credit					
3532	Head of Household Filing Status Schedule					
3533	Change of Address for Individuals					
3533-B	Change of Address for Businesses, Exempt Organizations, Estates and Trusts					
3534	Tax Information Authorization					
3535	FTB 3535, Tax Information Authorization Revocation					

		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
3536	Estimated Fee for LLCs					
3537	Payment for Automatic Extension for LLCs					
3538	Payment for Automatic Extension for LPs, LLPs, and REMICs					
3539	Payment for Automatic Extension for Corporations and Exempt Organizations					
3540	Credit Carryover and Recapture Summary					
3541	Motion Picture And Television Credit					
3544	Assignment of Credit					
3546	Enhanced Oil Recovery Credit					
3547	Donated Agricultural Products Transportation Credit					
3548	Disabled Access Credit for Eligible Small Business					
3551	Sale of Credit Attributable to an Independent Film					
3554	New Employment Credit					
3563	Payment for Automatic Extension for Fiduciaries					
3568	Alternative Identifying Information for the Dependent Exemption Credit					
3574	Special Election for Business Trusts and Certain Foreign Single Member LLCs					
3576	Pending Audit Tax Deposit Voucher for Individuals					
3577	Pending Audit Tax Deposit Voucher for Corporations					
3578	Pending Audit Tax Deposit for Limited Liability Companies (LLCs)					
3579	Pending Audit Tax Deposit Voucher for LPs, LLPs, and REMICs					
3580	Application and Election to Amortize Certified Pollution Control Facility					
3581	Tax Deposit Refund and Transfer Request					
3582	Payment Voucher for Individual e-filed Returns					
3582X	Payment Voucher for Individual e-filed Amended Returns					
3586	Payment Voucher for Corporations and Exempt Organizations e-filed Returns					
3587	Payment Voucher for LP, LLP, and REMIC e-filed Returns					

		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
3588	Payment Voucher for LLC e-filed Returns					
3592	College Access Tax Credit					
3596	Paid Preparer's Due Diligence Checklist for California Earned Income Tax Credit					
3725	Assets Transferred from Corporation to Insurance Company					
3726	Deferred Intercompany Stock Account (DISA) and Capital Gains Information					
3800	Tax Computation for Certain Children with Unearned Income					
3801	Passive Activity Loss Limitations					
3801-CR	Passive Activity Credit Limitations					
3802	Corporate Passive Activity Loss and Credit Limitations					
3803	Parents' Election to Report Child's Interest and Dividends					
3804	Pass-Through Entity Elective Tax Calculation					
3804-CR	Pass-Through Entity Elective Tax Credit					
3805E	Installment Sale Income					
3805P	Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts					
3805Q	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations - Corporations					
3805V	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations					
3805Z	Enterprise Zone Deduction and Credit Summary					
3807	Local Agency Military Base Recovery Area Deduction and Credit Summary (LAMBRA)					
3808	Manufacturing Enhancement Area Credit Summary (MEA)					
3809	Targeted Tax Area Deduction and Credit Summary (TTA)					
3814	New Donated Fresh Fruits or Vegetables Credit					
3820	High-Road Cannabis Tax Credit					
3821	Cannabis Equity Tax Credit					
3831	Homeless Hiring Tax Credit					
3832	Limited Liability Company Nonresident Members' Consent					
3834	Interest Computation Under the Look-Back Method for Completed Long-Term Contracts					
3835	State Historic Rehabilitation Tax Credit					

		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
3840	California Like-Kind Exchanges					
3843	Payment Voucher for Fiduciary e-filed Returns					
3853	Health Coverage Exemptions and Shared Responsibility Penalty					
3864	Group Nonresident Return Election					
3885	Corporation Depreciation and Amortization					
3885A	Depreciation and Amortization Adjustments					
3885F	Depreciation and Amortization Adjustments					
3885L	Depreciation and Amortization					
3885P	Depreciation and Amortization Method for Completed Long- Term Contracts					
3893	Pass-Through Entity Elective Tax Payment Voucher					
3895	California Health Insurance Marketplace Statement					
3913	Moving Expense Deduction					
4197	Information on Tax Expenditure Items					
540	California Resident Income Tax Return					
540 2EZ	California Resident Income Tax Return					
540-ES	Estimated Tax for Individuals					
540NR	California Nonresident or Part-Year Resident Income Tax Return					
541	California Fiduciary Income Tax Return					
541-A	Trust Accumulation of Charitable Amounts					
541-B	Charitable Remainder and Pooled Income Trusts					
541-ES	Estimated Tax for Fiduciaries					
541-QFT	California Income Tax Return for Qualified Funeral Trusts					
541-T	California Allocation of Estimated Tax Payments to Beneficiaries					
565	Partnership Return of Income					
565EO	Pass-Thru Entity Ownership (Partnership)					
568	Limited Liability Company Return of Income					
568EO	Pass-Thru Entity Ownership (LLC)					
570	Non-admitted Insurance Tax Return					
5805	Underpayment of Estimated Tax by Individuals and Fiduciaries					
5805F	Underpayment of Estimated Tax by Farmers and Fishermen					

		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
5806	Underpayment of Estimated Tax by Corporations					
587	Nonresident Withholding Allocation Worksheet					
5870A	Tax on Accumulation Distribution of Trusts					
588	Nonresident Withholding Waiver Request					
589	Nonresident Reduced Withholding Request					
590	Withholding Exemption Certificate					
590-P	Nonresident Withholding Exemption Certificate for Previously Reported Income					
592	Resident and Nonresident Withholding Statement					
592-A	Payment Voucher for Foreign Partner or Member Withholding					
592-B	Resident and Nonresident Withholding Tax Statement					
592-F	Foreign Partner or Member Annual Return					
592-V	Payment Voucher for Resident and Nonresident Withholding					
592PTE	Pass-Through Entity Annual Withholding Return					
592Q	Payment Voucher for Pass-Through Entity Withholding					
593	Real Estate Withholding Statement					
593-V	Payment Voucher for Real Estate Withholding					
8453	California e-file Return Authorization for Individuals					
8453-BE PMT	California Payment Authorization for Business Entities					
8453-C	California e-file Return Authorization for Corporations					
8453-EO	California e-file Return Authorization for Exempt Organizations					
8453-FID	California e-file Return Authorization for Fiduciaries					
8453-FID PMT	California Payment for Automatic Extension and Estimate Payment Authorization for Fiduciaries					
8453-LLC	California e-file Return Authorization for Limited Liability Companies					
8453-OL	California Online e-file Return Authorization for Individuals					
8453-P	California e-file Return Authorization for Partnerships					

		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
8453PMT	California Payment for Automatic Extension and Estimate Payment Authorization for Individuals					
8454	e-file Opt-Out Record for Individuals					
8455	California e-file Payment Record for Individuals					
8455-FID	California e-file Payment Record for Fiduciaries					
8879	California e-file Signature Authorization for Individuals					
8879-FID	California e-file Signature Authorization for Fiduciaries					
8879PMT	California Electronic Funds Withdrawal Payment Signature Authorization for Individuals and Fiduciaries					
RDP WORKSHEET	California RDP Adjustments Worksheet					
SCHEDULE B (100S)	S Corporation Depreciation and Amortization					
SCHEDULE C (100S)	S Corporation Tax Credits					
SCHEDULE CA (540)	California Adjustments – Residents					
SCHEDULE CA (540NR)	California Adjustments – Nonresidents or Part-Year Residents					
SCHEDULE D (100S)	S Corporation Capital Gains and Losses and Built-In Gains					
SCHEDULE D (540)	California Capital Gain or Loss Adjustment					
SCHEDULE D (540NR)	California Capital Gain or Loss Adjustment					
SCHEDULE D (541)	Capital Gain or Loss					
SCHEDULE D (565)	Capital Gain or Loss					
SCHEDULE D (568)	Capital Gain or Loss					
SCHEDULE D-1	Sales of Business Property					
SCHEDULE G-1	Tax on Lump Sum Distributions					
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 J (541)	Trust Allocation of an Accumulation Distribution					
SCHEDULE K-1 (100S)	Shareholder’s Share of Income, Deductions, Credits, etc.					
SCHEDULE K-1 (541)	Beneficiary's Share of Income, Deductions, Credits, etc.					
SCHEDULE K-1 (565)	Partner’s Share of Income, Deductions, Credits, etc.					

		Substitute Forms	2D Barcode	Scannable Voucher	Sub-Scan Forms	Absolute Position
SCHEDULE K-1 (568)	Partner'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 P (540)	Alternative Minimum Tax and Credit Limitations – Residents					
SCHEDULE P (540NR)	Alternative Minimum Tax and Credit Limitations – Nonresidents and Part-Year Residents					
SCHEDULE P (541)	Alternative Minimum Tax and Credit Limitations Fiduciaries					
SCHEDULE QS (100S)	Qualified Subchapter S Subsidiary (QSub) Information					
SCHEDULE R	Apportionment and Allocation of Income					
SCHEDULE S	Other State Tax Credit					
SCHEDULE W-2	Wage and Tax Statement					
SCHEDULE X	California Explanation of Amended Return Changes					

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.