2016 Federal Taxes -- 1040 Line Entry Help
(revision 03/14/2017)

Federal Section > Income >
Wages and Salaries (W-2) 7
Interest (1099-INT) 8
Dividends (1099-DIV) 9
State and Local Refunds (1099-G Box 2) 10
Alimony received 11
Profit or Loss from a Business (Sch C) 12
Form 1099-MISC 13
Capital Gains and Losses (Sch D) 14
IRA Distributions (1099-R) 15
Pension Distributions (1099-R) 16
Rents and Royalties (Sch E) 17
Unemployment Compensation 18
Social Security Benefits (1099-SSA) 19

Other Income >
Other Income: Not reported elsewhere 20
Gambling Winnings (W-2G) 21
Other Compensation (e.g., scholarships, household employee) 22
Payments from Qualified Education Programs (Form 1099-Q) 23
Cancellation of Debt (1099-C, Form 982) 24
K-1 Earnings 25

Federal Section > Deductions >
Wages and Salaries (W-2) 26
Interest (1099-INT) 27
Dividends (1099-DIV) 28
State and Local Refunds (1099-G Box 2) 29
Alimony received 30
Profit or Loss from a Business (Sch C) 31
Form 1099-MISC 32
Capital Gains and Losses (Sch D) 33
IRA Distributions (1099-R) 34
Pension Distributions (1099-R) 35
Rents and Royalties (Sch E) 36
Social Security Benefits (1099-SSA) 37
Unemployment Compensation 38

Other Income >
Other Income: Not reported elsewhere 39
Gambling Winnings (W-2G) 40
Other Compensation (e.g., scholarships, household employee) 41
Payments from Qualified Education Programs (Form 1099-Q) 42
Cancellation of Debt (1099-C, Form 982) 43
K-1 Earnings 44

Federal Section > Adjustments >
Medical Savings Account > Long Term Care Insurance Contracts (Form 8853) 45
Educator Expenses 46
Health Savings Account (Form 8889) 47
Moving Expenses (Form 3903) 48
Penalty on Early Withdrawal of Savings or CD 49
Alimony Paid 50
IRA Deduction 51
Non-deductible IRAs Form 8606 52
Student Loan Interest Deduction 53
Tuition and Fees Deduction 54
Federal Section > Standard Deduction 55

Federal Section > Credits Menu
Foreign Tax Credit (Form 1116) 56
Child Care Credit (Form 2441) 57
Education Credits (Form 2455) 58
Retirement Savings Credit (Form 8880) 59
Residential Energy Credit (Form 5695) 60
Credit for the Elderly or Disabled (Schedule R) 61
Earned Income Credit (Form 8826) 62

Federal Section > Other Taxes >
Self-Employment Tax (Schedule SE) 63
Tax on Unreported Tip Income (Form 4137) 64
Tax on Early Distribution (Form 5329) 65
First-time Homebuyer Repayment (Form 5040) 66

Federal Section > Payments and Estimates >
Other Federal (and State) Withholding 67
Federal (and State) Estimated Payments for 2016 68
Amount Paid with Extension Request (Form 4868) 69
Underpayment of Estimated Tax (Form 2210) 70
Apply Overpayment to Next Year's Taxes 71
Vouchers for Next Year's Estimated Payments (1040-ES) 72

Health Insurance
ACA Premium Tax Credit (Form 8962) 73
ACA Individual Responsibility 74
ACA Exemptions (Form 8965) 75

Compliance Flowchart
ACA Clarifications
PTC Tips & Tricks
IRS payment options
TaxSlayer NTTC Update
pub 502 Medical/Dental
Affordability Calculator
### Useful Links and Documents

**Federal (& some NY) Tax Help**

<table>
<thead>
<tr>
<th>NTTC Slides</th>
<th>Pub 17 Your Income Tax</th>
<th>Pub 4012 Resource Guide</th>
<th>1040 Instructions</th>
<th>Other Links</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Basic Information &gt;</strong></td>
<td></td>
<td></td>
<td></td>
<td>Filing Status Flow Chart</td>
</tr>
<tr>
<td>Filing Status</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Information (Who must file?)</td>
<td></td>
<td></td>
<td>Qualifying Child/Relative Charts Online Tool</td>
<td></td>
</tr>
<tr>
<td>Dependents / Qualifying Person</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Federal Section > Miscellaneous Forms >**

- Injured Spouse Form (Form 8379)
- Claim a Refund Due to a Deceased Taxpayer (Form 1310)
- Identity Theft (IRS Identification Pin)

**2016 Amended Return**

- 1040X Instructions
- NTTC Update
- NY TP-300 Reference
- NY IT-201-X Instructions

**Recordkeeping**

**Other Links**

- IRS Homepage
- IRS Forms and Publications Online
- Where's my Refund? (Federal)
- Get Status of my Amended Return (Federal)
- Get Transcript of Past Tax Returns†
- ACA → NY Second Lowest Cost Silver Plans ▪ NY Lowest Cost Bronze Plans
- Required Minimum Distribution (RMD) Calculator

**New York Tax Help**

<table>
<thead>
<tr>
<th>NY Slides</th>
<th>IT-201 Instructions</th>
<th>Pub TP-300 Reference Guide 2015 2016</th>
<th>Pub 36 Senior and Retirees</th>
<th>Other Links</th>
<th>IT-201 Line #</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NY State Section &gt; Basic Information &gt;</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>63a</td>
</tr>
<tr>
<td>Family Tax Relief Credit (IT-114)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>School District</td>
<td></td>
<td></td>
<td></td>
<td>NY School District by Address</td>
<td></td>
</tr>
</tbody>
</table>

**NY State Section > Nonobligated Spouse Allocation (Form IT-280)**

- Injured Spouse Form (Form 8379)
- Interest Income on Other State Bonds and Obligations
- NY 529 College Savings Program Distributions

**NY State Section > Additions to Income >**

- 20
- 30

**NY State Section > Subtractions from Income >**

- 24
- 32
- 22

**NY State Section > Subtractions from Federal Deductions >**

- 26, 29, 31

**NY State Section > Itemized Deductions > Subtractions from Federal Deductions >**

- Long Term Residential Care Deduction (Code S-105)
- Certain Investment Income from US Obligations
- Railroad Retirement Income

**NY State Section > Credits >**

- 42
- 71
- 68
- 67
- 41
- 41

**NY State Section > Other Refundable Credits >**

- Long Term Care Insurance Credit (IT-249)
- Volunteer Firefighters and Ambulance Workers Credit (Form IT-245)
- College Tuition Credit (Form IT-272)
- Real Property Tax Credit (IT-214)
- Credit for Taxes Paid to a Province of Canada (IT-112-C)
- Credit for Taxes Paid to another state (IT-112-R)

**NY State Section > State Estimated Payments >**

- 79
- 81

**Federal Section > Payments and Estimates >**

- 75
- 40
- 41
- 41

**Online account required**

† Online account required