

# Form 1040 - ATS Known Issues and Solutions

## Processing Year 2013

As of November 21, 2012

| Item | Form Type and/or Scenario        | Description of the Problem   | Element | Solution  | Status |
|------|----------------------------------|--|---------|---|--------|
| 1    | Scenario 1                       | W-2 and Direct Deposit information   |         | Remove W-2 and Direct Deposit information                 |        |
| 2    | Scenario 3                       | Schedule B line 7a(2) should not be checked  |         | Remove check  |        |
| 3    | Scenario 3                       | Schedule C   |         | Line 9 assume mileage is correct                          |        |
| 4    | Scenario 3                       | Form 8867 line 5b should not be checked  |         | Remove check  |        |
| 5    | Scenario 3                       | Form 1040 - 6c(4) checked in error or the 1st child for the Child Tax Credit (the first child is no longer under age 17) |         | Remove check  |        |
| 6    | Scenario 3                       | EITC line 4a (need to be checked)  |         | Enter a check box for Line 4a                             |        |
| 7    | Scenario 3                       | Form 8888 - 1a, 2a amount incorrect  |         | 1a. 500.00<br>2a. 500.00                                  |        |
| 8    | Scenario 9                       | Form 8863 – Lifetime Learning expenses omitted   |         | Enter 400.00 on line 31                                   |        |
| 9    | Scenario 2, 3, 5, 6, 7, 8, 9, 10 | W-2s, Social Security Tax Rate is 6.2  |         | The correct W-2s, Social Security Tax Rate is 4.2         |        |
| 10   | Scenario 1                       | Form 2555, line 6c checked   |         | Remove check  |        |
| 11   | Scenario 1                       | Preparer Phone only 9 digits 800-555-637   |         | Correct number 800-555-6376                               |        |
| 12   | Scenario 3                       | Form 8862, Part II   |         | Lines 4b and 4c should be 366                             |        |
| 13   | Scenario 3                       | Child 1 for the EITC   |         | Child 1 for the EITC year of birth is 1991 4a Box checked |        |

|    |                |   |                              |   |  |
|----|----------------|---|------------------------------|---|--|
| 14 | Scenario 2     | W-2 address incorrect   |                              | Correct W-2 to 5250 W. Sahara   |  |
| 15 | Scenario 5     | Form 4972 Taxpayer Name Incorrect Zenus                                 |                              | Correct to Zeus   |  |
| 16 | Scenario 5     | Form 5329 – Taxpayer's address entered                                  |                              | Remove Taxpayer's address   |  |
| 17 | Scenario 5     | Form 8889 – Primary year of birth incorrect                             |                              | Year of birth 1959  |  |
| 18 | Scenario 7     | 6c Dependent's relationship   |                              | Son   |  |
| 19 | Scenario 7     | Form 1099 MISC is not separate  |                              | 1099 MISC is from Indian Gaming Proceeds  |  |
| 20 | Scenario 9     | 400.00 on line 9 incorrect  |                              | Remove 400.00 from line 9   |  |
| 21 | Scenario 3     | Form 8867   |                              | Part II, line 8 enter only the child's first name   |  |
| 22 | Scenario 4 & 6 | Sc#4-Missing Forms 8949, 6252, and Schedule D<br>Sc#6-Missing Form 8958 |                              | Forms 8949, 6252, 8958, and Schedule D are not required. Form 6252 is filed with Schedule D.<br><br>Publication 1436's Cover Letter has more information. |  |
| 23 | Scenario 3     | Schedule C  |                              | Line 22 should read 207<br>Line 44a should read 949   |  |
| 24 | Scenario 5     | Omitted ID theft PIN  | OUOCode in the Return Header | IdentityProtectionPIN 876534  |  |
| 25 | Scenario 11    | Form 1040SS-PR – Part IV  |                              | Part IV line 1 should read 9,453.00   |  |
|    |                |   |                              |   |  |
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[illegible]