

2017 Taxpayer General Information

Taxpayer										Spouse																
Filing status	1									SSN	2															
First name	3						MI	4			First name	25						MI	26							
Last name	5					Suffix	6				Last name	27					Suffix	28								
Date of birth	7				Date of death	8					Date of birth	29				Date of death	30									
Occupation	9										Occupation	31														
Phone number					Extension					Phone number					Extension											
Daytime	10					11					Daytime	32					33									
Evening	12					13					Evening	34					35									
Cell	14										Cell	36														
Best time to call	15					Print on return	16					Best time to call	37					Print on return	38							
Fax	17										Fax	39														
Email/text msg	18										Email/text msg	40														
19	Dependent of another	20	Full-time student	21	Presidential campaign	22	Blind	41	Dependent of another	42	Full-time student	43	Presidential campaign	44	Blind											
Taxpayer did not live with spouse		23	1- for the last 6 months 2- even 1 day during the year					45	Non-resident alien	46	Spouse is not filing a return		47	Spouse has no U.S. income												
In care of							48																			
Street address							49						Apt #	50												
City							51																			
U.S. Address Only:		State, ZIP, County					52	53	54				55	Stateside military address												
Foreign Address Only:		Province/State, Country, Postal Code					56					57	58													
Resident State, City, School District							59	60			61															
Foreign Account Questions										Miscellaneous Codes																
If taxpayer has any interest in or authority over any foreign account or foreign trust, answer questions on the Foreign Accounts Screen										Otherwise check here Answer "No" to Sch B, Part III questions																
Firm #	63					Invoice number					2210 Options					Code 1	72									
Preparer #	64										2210 Code					69					Code 2	73				
Data Entry #	65					Fee override					2016 Fed tax					70					Code 3	74				
ERO #	66										2016 State tax					71					Code 4	75				
																				Code 5	76					

1
1-1

2017 Taxpayer Identification

IDS
1-8

Taxpayer's Driver's License or Other State-Issued Photo ID	Spouse's Driver's License or Other State-Issued Photo ID
Type <input type="text" value="1"/> 1 - Driver's license 2 - State-issued photo ID	Type <input type="text" value="6"/> 1 - Driver's license 2 - State-issued photo ID
Number <input style="width:100%;" type="text" value="2"/>	Number <input style="width:100%;" type="text" value="7"/>
State <input type="text" value="3"/>	State <input type="text" value="8"/>
Issue date <input type="text" value="4"/> If no DAY is provided, use "01."	Issue date <input type="text" value="9"/> If no DAY is provided, use "01."
Expiration date <input type="text" value="5"/> If no DAY is provided, use "01."	Expiration date <input type="text" value="10"/> If no DAY is provided, use "01."
For non-expiring state IDs, type "NONEXPR" into the "Expiration Date."	
<input type="checkbox"/> 21 Mark this box if the taxpayer doesn't have a driver's license or a state-issued photo ID.	<input type="checkbox"/> 23 Mark this box if the spouse doesn't have a driver's license or state-issued photo ID.
<input type="checkbox"/> 22 Mark this box if the taxpayer did not provide a driver's license or state-issued photo ID.	<input type="checkbox"/> 24 Mark this box if the spouse did not provide a driver's license or state issued photo ID.

Direct Deposit Information

DD
1-2

Account Information		
Account #1	Federal selection <input type="text" value="1"/>	Federal deposit amount <input type="text" value="3"/>
	State/city selection <input type="text" value="2"/>	State deposit amount <input type="text" value="4"/>
Name of financial institution <input style="width:100%;" type="text" value="5"/>	RTN <input style="width:100%;" type="text" value="6"/>	Account number <input style="width:100%;" type="text" value="7"/>
Type of account <input type="text" value="8"/> Checking <input type="text" value="9"/> Savings	Check if account is	<input type="text" value="14"/> IRA <input type="text" value="15"/> Foreign
Account #2	Federal selection <input type="text" value="16"/>	Federal deposit amount <input type="text" value="18"/>
	State/city selection <input type="text" value="17"/>	State deposit amount <input type="text" value="19"/>
Name of financial institution <input style="width:100%;" type="text" value="20"/>	RTN <input style="width:100%;" type="text" value="21"/>	Account number <input style="width:100%;" type="text" value="22"/>
Type of account <input type="text" value="23"/> Checking <input type="text" value="24"/> Savings	Check if account is	<input type="text" value="29"/> IRA <input type="text" value="30"/> Foreign
Account #3	Federal selection <input type="text" value="31"/>	Federal deposit amount <input type="text" value="33"/>
	State/city selection <input type="text" value="32"/>	State deposit amount <input type="text" value="34"/>
Name of financial institution <input style="width:100%;" type="text" value="35"/>	RTN <input style="width:100%;" type="text" value="36"/>	Account number <input style="width:100%;" type="text" value="37"/>
Type of account <input type="text" value="38"/> Checking <input type="text" value="39"/> Savings	Check if account is	<input type="text" value="44"/> IRA <input type="text" value="45"/> Foreign