



**“We Don’t Just Do Taxes...WE KNOW TAXES”**

## **DRAKE SOFTWARE 2023 (Order Of Operations)**

- 01) \*NAME AND ADDRESS (SCREEN 1)
- 02) \*DEPENDENTS (SCREEN 2) (Y, Y, Y, N, BLANK, BLANK, Y, Y, Y,)
- 03) \*FORM 8867 (DUE DILIGENCE CHECKLIST) (Y, Y, N, Y, Y, Y, Y, Y, N/A, Y, Y, Y, Y, Y, N, N, Y, Y, N)
- 04) FORM 2441 (CHILD AND DEPENDENT CARE EXPENSES)
- 05) FORM 8863 (EDUCATION CREDITS)
- 06) \*FORM W-2 (WAGES)
- 07) FORM 8880 (RETIREMENT SAVINGS CONTRIBUTION CREDIT)
- 08) INCOME (SCREEN 3)
- 09) FORM 1099-DIV (ONLY IF DIVIDENDS OR INTEREST INCOME IS MORE THAN \$1,500)
- 10) FORM 1099-INT (ONLY IF INTEREST OR DIVIDENDS INCOME IS MORE THAN \$1,500)
- 11) \*FORM 1099-R (RETIREMENT DISTRIBUTIONS)
- 12) FORM 5329 (IRA PENALTY COMPUTATION)
- 13) FORM 8915-F (QUALIFIED DISASTER RETIREMENT PLAN DISTRIBUTIONS AND REPAYMENTS)
- 14) FORM 8915-X (PRIOR-YEAR DISTRIBUTIONS AND REPAYMENTS)
- 15) \*FORM W-2G (GAMBLING INCOME)
- 16) \*FORM 1099-G (UNEMPLOYMENT COMPENSATION)
- 17) FORM SSA-1099 (SOCIAL SECURITY BENEFITS)
- 18) SCHEDULE D (CAPITAL GAINS AND LOSSES)
- 19) FORM 1099-C (CANCELLATION OF DEBT INCOME)
- 20) FORM 982 (DEBT DISCHARGE)
- 21) SCHEDULE C (BUSINESS INCOME)
- 22) SCHEDULE E (RENTAL PROPERTY INCOME)
- 23) SCHEDULE F (FARMING INCOME)
- 24) ADJUSTMENTS (SCREEN 4)
- 25) MISSISSIPPI ALIMONY RECIPIENTS
- 26) FORM 3903 (MOVING EXPENSES)
- 27) FORM 2106 (UNREIMBURSED EMPLOYEE BUSINESS EXPENSES)
- 28) SCHEDULE A (ITEMIZED DEDUCTIONS)
- 29) FORM 8283 (NONCASH CHARITABLE CONTRIBUTIONS)
- 30) FORM 4684 (CASUALTY AND THEFT LOSSES)
- 31) FORM 8829 (HOME OFFICE DEDUCTIONS)
- 32) \*HC (GENERAL HEALTH COVERAGE INFORMATION)
- 33) FORM 1095-A (HEALTH INSURANCE MARKETPLACE STATEMENT)
- 34) FORM 8962 (PREMIUM TAX CREDIT)
- 35) \*CONS (CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION TO OTHER FIRMS)
- 36) \*IDS (IDENTIFICATION FOR TAXPAYER/SPOUSE)
- 37) \*PIN (8879/8878 E-FILE SIGNATURE)
- 38) \*EF (EF SELECTIONS)
- 39) VIEW AND CORRECT ALL MESSAGES
- 40) VIEW AND CORRECT ALL NOTES IF POSSIBLE
- 41) VIEW FORM 1040 OR 1040-SR, SCHEDULES 1, 2, 3, EIC, AND VERIFY FEDERAL AND STATE WITHHOLDING
- 42) GIVE TAXPAYERS REFUND AND/OR BALANCE DUE AMOUNT FOR FEDERAL AND/OR STATE
- 43) \*DD (DIRECT DEPOSIT/FORM 8888)