



**“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, 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, ETC, 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)**