



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

DRAKE SOFTWARE 2019 (Order Of Operations)

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