ULTRATAX CS™

PENNSYLVANIA STATE PRODUCTS

The UltraTax CS programs for Pennsylvania work together with the federal UltraTax CS programs, reducing state tax return preparation to a few keystrokes—and a few short minutes.

By taking full advantage of the integration capabilities of CS Professional Suite, your firm can reach maximum efficiency, productivity, and accuracy.



STATE PRODUCT PROFILE

- Pennsylvania Individual (and Cities)
- Pennsylvania Corporate (and Cities, includes S Corp)
- Pennsylvania Partnership (and Cities)
- Pennsylvania Fiduciary

UltraTax CS state programs automatically capture all appropriate federal data and calculate the state tax results. You enter data only once to complete both returns, simply and efficiently.

The Pennsylvania line-up for UltraTax CS includes Pennsylvania Individual, Corporate (includes S Corp), Partnership, Fiduciary, and Cities programs.

ULTRATAX/1040

Multi-state processing

UltraTax/1040 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data.

PENNSYLVANIA INDIVIDUAL

Pennsylvania Forms and Schedules

Form PA-40—Individual Income Tax Return

Form PA-1000 RC*—Rent Certificate and Rental Occupancy Affidavit

Form PA-8453—Declaration for Electronic Filing

Form PA-8879—Pennsylvania E-File Signature Authorization

Form RCT 101—PA Corporate Tax Return

Form REV-459B EX*—Consent to Transfer, Adjust or Correct PA Estimated Personal Income Tax Account

Form REV-677 LE—Power of Attorney and Declaration of Representative

Jurat/Disclosure Statement

Form REV-860—Schedules L, M-1 and M-2, Single Member Limited Liability Company Information

Form PA-40ES—Individual Declaration of Estimated Personal Income Tax

Form PA-V—Payment Voucher

Form REV 961—Adjustments to Net Income Per Books

Schedule G-R—Reconciliation of Taxes Paid to Another State

Schedule 19—Taxable Sale of a Principal Residence

Form REV-276—Application for Extension of Time to File

Form REV-1630—Underpayment of Estimated Tax by Individuals

Form PA 8857—Request for Relief from Joint Liability

Schedule OC-V*—Volunteer Responder Recruitment and Potention Tax Credit Application

Retention Tax Credit Application

Form PA 8379—Injured Spouse Claim and Allocation

Form PA 12507—Innocent Spouse Statement

Form PA12510—Questionnaire for Spousal Relief from Joint Liability for Requesting Spouse

Form PA-1000—Property Tax\Rent Rebate Claim

Form PACE*-Enrollment Application

Schedule A&B—Taxable Interest and Dividend Income

Schedule J/T—Income from Estates or Trust and Gambling and Lottery Winnings

Schedule OC—Other Credits

Schedule C—Profit or Loss from Business or Profession

Schedule C-F—Adjusting Federal Business Expenses for PA

Schedule D—Sale or Exchange of Property

Schedule D-1—Computation of Installment Sale Income

Schedule D-71—Sale or Exchange of Property Prior to 6/1/71

Schedule E-Rent, Royalty, Patent and Copyright Income

Schedule F—Farm Income and Expenses

Schedule G-L—Credit for Income Taxes Paid to Another State

Schedule NRH—Compensation Apportionment

Schedule O-Other Deductions

Schedule RK-1—Resident Schedule Of Pennsylvania S Shareholder/Partner/Beneficiary Pass-Through Income, Loss, and Credits

Schedule NRK-1—Nonresident Schedule Of Pennsylvania S Shareholder/Partner/Beneficiary Pass-Through Income, Loss, and Credits

Schedule SP—Special Tax Forgiveness

Schedule UE—Allowable Employee Business Expenses

Schedule W2S—Wage Statement

Schedule W-Employment incentive Payments Credit

PENNSYLVANIA CITIES

Generic Earned Income Tax Return

Generic Earned Income Tax Estimates

Form 214—York Area Earned Income Tax Return

Philadelphia Forms and Schedules

Form BPT/EZ—Philadelphia Business Privilege Tax

Form BPT-A—BPT, Schedule A Form BPT-B—BPT, Schedule B

Form BPT-C-BPT, Schedule C-1

Form BPT-D, Schedule D

Form BPT-E-BPT, Schedule E

Form BPT-Payment—BPT, Payment Coupon

Form BPT EXT—BPT, Worksheet and Extension Coupon

Form ENP-1/2—NPT, Estimate Coupons Form NPT—Philadelphia Net Profits Tax

Form NPT-A, B, and C—NPT, Schedules A, B, and C

Form NPT-D, E, and K—NPT, Schedules D, E, and K

Form NPT-NR3—NPT, Schedule NR3
Form NPT-Ext—NPT, Extension Coupon

Form NPT-Pymt Coupon—NPT, Payment Coupon

Form SIT—Philadelphia School Income Tax

Annual Reconciliation of Employee Earnings Tax

Pittsburgh Forms and Schedules

Form PGH-40—City and School District of Pittsburgh

Form NP-5—Estimated Tax on Net Profits

Form BP—Pittsburgh Business Privilege Tax Return

Form WTEX—Nonresident of City of Pittsburgh Stop Withholding Wage Tax

PENNSYLVANIA CORPORATE

With the UltraTax/1120 Pennsylvania program, you can process both C and S Corporation returns.

Pennsylvania Forms and Schedules

Form PA 20S/PA-65—PA S Corporation/Partnership Information Return

Form PA-205/PA-65 — Directory-partner/Member/ Shareholder Directory

Form PA-40 NRC—Nonresident Consolidated Income Tax Return

Form PA-40 NRC-I—Directory of Nonresident Owners—Individuals

Form PA-40 NRC-O—Directory of Nonresident and Foreign Owners-other Entities

PA-40-ES—Declaration of Estimated Income Tax for Individual, Fiduciary or Partnership

Form PA-65V—Nonresident Withholding Payment

Form RCT-101—PA Corporate Tax Report

Form RCT-101D—Declaration of de minimis PA Activity

Form RCT-101-I—Inactive PA Corporate Tax Report

Form RCT-101-X—Amended PA Corporate Tax Report

Form RCT-102—Capital Stock Tax Manufacturing

Exemption Schedule

Form RCT-103—Net Operating Loss Schedule

Form RCT-105—Three Factor Capital Stock/Foreign Franchise

Tax Manufacturing Exemption Schedule

Form RCT-106—Insert Sheet for Form RCT-101

Form CT-V—Fed/State Payment Voucher

Form PA-8453-C—Pennsylvania Corporation Tax Declaration

for a State E-File Report

Form PA-8879-C—Pennsylvania E-File Signature Authorization

for Corporation Tax Report RCT-101

Form PA-8453-P—PA S Corporation Tax Declaration for a State

E-File Return

Form PA-8879-P—Pennsylvania E-File Signature Authorization

for PAS Corporation

Form REV-276—Application for Extension of Time to File

Form REV-291*—Nonwithholding of PA Income Tax Application

Form REV-798CT—Schedule C-2 PA Dividend Deduction

Schedule and Schedule X

Form REV-853R—Annual Extension Request

Form REV-854R*—EIN/Filing Period / Address Change

Form REV-857R—Estimated Tax Payment

Schedule CO (REV-1605 CT)—Names of Corporate Officers

PA Schedule A&B (PA-20S/PA-65)—Interest and

Dividend Income

PA Schedule E—(PA-20S/PA-65) Rents and Royalties

Income (Loss)

PA Schedule H—(PA-20S/PA-65) Apportioned Business

Income (Loss)

Schedule M—(PA-20S/PA-65) Reconciliation of Federal Taxable

Income to PA Taxable Income

Schedule NRK-1—(PA-20S/PA-65) Nonresident Schedule of PA Shareholder/Partner Pass Through Income, Loss, and Credits

PA Schedule NW/J (PA-20S/PA-65)—Nonresident Withholding

Payments and Income from Estates or Trusts

PA Schedule OC/T PA205/PA-65—Other Credits and Gambling

and Lottery Winnings

Schedule RK-1—(PA-20S/PA-65) Resident Schedule of PA Shareholder/Partner Pass Through Income, Loss, and Credits

Schedule C* (PA-40) — Profit or Loss from Business or Profession

Schedule C-3 (REV-799 CT)—Adjustment for Bonus Depreciation

Schedule C-4 (REV-799 CT)—Adjustment for Disposal of Section 168(k) Property and Recapture of Depreciation on Listed Property

Schedule C-5-(REV-860)—Schedule of Taxes

PA Schedule D (PA-205/PA-65)—Sale, Exchange, or Disposition of Property

PA Schedule D-1(Rev-1689 Ex)—Computation of Installment Sale Income

Schedule DA*-(Rev-861)—Disposition of Assets

Form REV-677—Power of Attorney and Declaration of Representative

Form REV-238*—Out of Existence/Withdrawal Affidavit

Form REV-934 CT-Schedule of Non-Business Income

Form REV-986CT—Schedule to Support Claim of Exemption from Corporation Net Income Tax Under PL. 86-272

Form REV-961 CT—Schedule A-2 and Schedule A-3

Schedule D-71*—Sale or Exchange of Property Acquired Prior to June 1, 1971

Schedule F* (PA-40) —Farm Income and Expenses

Schedule G-L* (PA-40) — Credit for Taxes Paid to Other States

Schedule G-R—Reconciliation of Taxes Paid to Other States

Schedule W*-Employment Incentive Payments Credit

PENNSYLVANIA CITIES

Philadelphia Forms and Schedules

Form BPT-EZ—Business Privilege Tax-EZ

Form BPT—Business Privilege Tax

Form BPT-A—BPT, Schedule A

Form BPT-B-BPT, Schedule B

Form BPT-C-BPT, Schedule C-1

Form BPT-D-BPT, Schedule D

Form BPT-E-BPT, Schedule E

Form BPT Payment—BPT Payment Coupon

Form BPT EXT—BPT, Worksheet and Extension Coupon

Form 83-T-5*—Application for Philadelphia Business Tax Account Number, Business Privilege License, Wage Tax Withholding Account

Change Form*

Pittsburgh Forms and Schedules

Form BP—Business Privilege Tax

PENNSYLVANIA PARTNERSHIP

The UltraTax/1065

Pennsylvania program:

 Allows for the allocation of Form PA-65 amounts to specific partners

- Calculates and prints Schedule D and D-1 using Pennsylvania basis amounts
- Calculates and prints Rental Schedules using Pennsylvania amounts

Pennsylvania Forms and Schedules

Form PA-40NRC—Nonresident Consolidated Income Tax Return

Form PA-40 NRC-I—Directory of Nonresident Individual Owners

Form PA-40 NRC-O—Directory of Other Nonresident and Foreign Owners

Form PA-40ES—Declaration of Estimated Income Tax for Individual Fiduciary or Partnership

Form PA-65 Corp—Directory of Corporate Partners

Form PA-20S/PA-65—PA S Corporation/Partnership Information Return

Form PA-8453-C—Pennsylvania Corporation Tax Declaration for State E-Filie Report

Form PA-8879-C—Pennsylvania E-File Signature Authorization for Corporate Tax Report RCT-101

Form PA-8453-P—PA S Corporation / Partnership Information Return Tax Declaration for a State E-File Return

Form PA-8879-P—Pennsylvania E-File Signature Authorization for PA S Corporation / Partnership Information Return

Form CT-V—Fed / State Payment Voucher

Form Rev-276 EX—Application for Extension of Time to File

Form Rev-291*—Nonwithholding of PA Income Tax Application

Form PA-V—Nonresident Withholding Payment

Schedule A & B-Interest and Dividend Income

Schedule C*-Profit or Loss From Business or Profession

Schedule CP—Corporate Partner Withholding

Schedule F*—Farm Income and Expenses

Schedule D—Sale, Exchange, and Disposition of Property within PA

Schedule D-1—Computation of Installment Sale Income

Schedule D-71*—Sale or Exchange of Property Prior to 6/1/71

Schedule G-L*—Computation of Credit for Taxes Paid to Other States or Countries

Schedule G-R*—Reconciliation of Taxes Paid to Other States or Countries

Schedule E—Rents and Royalty Income (Loss)

Schedule H—Apportioned Business Income (Loss)

Schedule H-Corp—Corporate Partner Apportioned

Business Income

Schedule J—Income from Estates and Trusts

Schedule M—Reconciliation of Federal Ordinary Income to PA Taxable Income

Schedule OC-Other Credits

Schedule NW—Nonresident Withholding Payments

Schedule NRK-1—Nonresident's Schedule of PA S Shareholder/ Partner/Beneficiary Pass Through Income, Loss and Credits

Schedule RK-1—Resident Schedule of PA S Shareholder/Partner/ Beneficiary Pass Through Income, Loss and Credits

Schedule T—Gambling and Lottery Winnings

Schedule W-Employment Incentive Payments Credit

REV-677—Power of Attorney and Declaration of Representative

Form RCT-101—PA Corporate Tax Report

Form RCT-101D—Declaration of de minimis PA Activity

Form RCT-101-I—Inactive PA Corporate Tax Report

Form RCT-101-X—Amended PA Corporate Tax Report

Form RCT-102—Capital Stock Tax Manufacturing Exemption Schedule

Form RCT-105—Three-Factor Capital Stock/Foreign Franchise

Tax Manufacturing Exemption Schedule

Form RCT-106—Insert Sheet for Form RCT-101

Form Rev-853—Annual Extension Request

Form REV-854R—EIN / Filing Period / Address Change*

Form Rev-857R—Estimated Tax Payments

Form Rev-798—Schedule C-2 PA Dividend Deduction Schedule

Form Rev-961—Schedule A-3—Adjustments to Net Income per Books

PENNSYLVANIA CITIES

Philadelphia Forms and Schedules

Form BPT—Philadelphia Business Privilege Tax

Form BPT-A-BPT, Schedule A

Form BPT-B—BPT, Schedule B

Form BPT-C-BPT, Schedule C-1

Form BPT-D-BPT, Schedule D

Form BPT-E-BPT, Schedule E

Form BPT-EZ—Philadelphia Business Privilege Tax-EZ

Form BPT-PC-BPT Payment Coupon

Form BPT EXT—BPT, Extension Coupon

Form NPT/BPT-Depreciation Adjustment Worksheet

Form NPT—Philadelphia Net Profits Tax Return

Form NPT-A, B, and C-NPT, Worksheets A, B, and C

Form NPT-D, E, K and Extension—NPT, Worksheets D, E, K and Extension

Form NPT-NR-3—NPT, Worksheet NR-3

Form NPT-EXT-NPT, Extension Coupon

Form NPT-Pymt Coup—NPT, Payment Coupon

Form ENP-1 & 2—Estimated Tax Payment

Form 83-T-5*—Application for Philadelphia Business Tax Account Number

Form Change*—Philadelphia Change Form

Pittsburgh Forms and Schedules

Form BP—Pittsburgh Business Privilege Tax Return

PENNSYLVANIA FIDUCIARY

Multi-state processing

UltraTax/1041 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data.

Pennsylvania Forms and Schedules

Form PA-41—Pennsylvania Fiduciary Income Tax Return

Form PA-40ES—Individual Declaration of Estimated Personal Income Tax

Form PA-41V—Payment Voucher

Form REV-276—Application for Extension of Time to File

Form REV-459*—Estates, Trusts, Partnerships, Limited Liability Companies, Associations, PA S Corporations Only Change Form

Form REV-677 LE—Power of Attorney and Declaration of Representative

Form REV-1630F—Underpayment of Estimated Tax by Fiduciaries

Schedule A/B/J (PA-41 A/B/J)—Interest and Dividend Income

Schedule C (PA-40 C)—Profit or Loss From Business or Profession (Sole Proprietorship)

Schedule C-F (PA-40 C-F)*—Adjusting Taxable Income for Pennsylvania Income Tax Purposes

Schedule D-1 (REV-1689 EX)—Computation of Installment Sale Income

Schedule D-71 (REV-1742 EX)*—Sale or Exchange of Property Acquired Prior to June 1, 1971

Schedule DD/D (PA-41 D/DD)—Distribution Deduction Schedule and Sale, Exchange, or Disposition of Property

Schedule E (PA-40 E)—Rents and Royalty Income (Loss)

Schedule F (PA-40 F)—Farm Income and Expenses

Schedule G-L (PA-40 G)—Computation of Credit for Taxes Paid to Other States or Countries

Schedule NRK-1—Nonresident Schedule of PA S Shareholder/PA Partner/Beneficiary Pass Through Income, Loss, and Credits

Schedule OC—Other Credits

Schedule RK-1—Resident Schedule of PA S Shareholder/ PA Partner/S Shareholder Beneficiary Pass Through Income, Loss, and Credits

SUPPORT

You receive the same toll-free access to the Thomson Reuters Support HelpLine for state and local UltraTax CS products as you do for your federal UltraTax CS products.

MONEY-BACK GUARANTEE

All Thomson Reuters software is backed with a written money-back guarantee. If you are not completely satisfied with any fully licensed UltraTax CS product, return the software within the specified period for a refund.

PER-RETURN PRICING (PRP)

For your convenience, all UltraTax CS software is available on a per-return basis. UltraTax PRP offers a cost-effective way to handle states and entities that require a limited number of returns.

MORE INFORMATION

UltraTax CS products for Pennsylvania are just part of the family of more than 150 UltraTax CS state and local programs. For more information, please call a Thomson Reuters Account Representative at **800.968.8900**.

*Denotes non-calculating form
**Denotes 1120 Consolidated form

