

ORGANIZER PRINT OPTIONS

The following information identifies the organizer forms that print for the Classic Client Organizer and the Lite Client Organizer packages using the default collations.

- The Lite Client Organizer columns reflect the pages that print when you select the *Lite Client Organizer pages for clients who meet Lite criteria* option only.
- The Lite Client Organizer (Forced) column reflects the pages that print when you select the *Lite Client Organizer pages for clients who meet Lite criteria* option **and** the *Force Lite pages even when client does not meet Lite criteria* checkbox.
- The Lite Client Organizer Plus columns reflect the pages that print when you select the *Lite Client Organizer pages plus other pages in classic format* option only.
- The Lite Client Organizer Plus (Forced) column reflects the pages that print when you select the *Lite Client Organizer pages plus other pages in classic format* option **and** the *Force Lite pages even when client does not meet Lite criteria* checkbox.

In the following table, **X** = will print as applicable, * = depending on Summary options chosen, — = not applicable, mutually exclusive, and blank = will not print.

Form ID	Form Name	Classic Client Organizer	Lite Client Organizer		Lite Client Organizer	Lite Client Organizer Plus		Lite Client Organizer Plus
			Criteria met	Criteria not met	(Forced)	Criteria met	Criteria not met	(Forced)
	Slipsheet/client	X	X	X	X	X	X	X
	Slipsheet/preparer	X	X	X	X	X	X	X
	Cover Letter	X	X	X	X	X	X	X
	Client Questionnaire	One of these						
WebQU	Web Questionnaire							
INDX	Organizer Index	X	—	X	—	—	X	—
Lite-1	Org Lite General	—	X	—	X	X	—	X
Lite-2	Org Lite Income 1	—	X	—	X	X	—	X
Lite-2	Org Lite Income Summary	—	*	—	*	*	—	*
Lite-3	Org Lite Income 2	—	X	—	X	X	—	X
Lite-4	Org Lite Adjustments	—	X	—	X	X	—	X
Lite-5	Org Lite Itemized Deduction	—	X	—	X	X	—	X
Lite-6	Org Lite Bank & ID Authentication	—	X	—	X	X	—	X
1040	Personal Information	X	—	X	—	—	X	—
Info	Client Contact Info	X	—	X	—	—	X	—

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			Criteria met	Criteria not met	(Forced)	Criteria met	Criteria not met	(Forced)
Bank	Deposit, Electronic Funds Withdrawal	X	—	X	—	—	X	—
ELF	Electronic Filing	X		X		X	X	X
IDAuth	Identity Authentication	X		X		X	X	X
Est	Estimate Payments	X		X		X	X	X
St Pmt	State & City Payments	X		X		X	X	X
SumRep	Income Summary	*	—	*	—	—	*	—
IntDiv	Summary Report, Interest & Dividends	*	—	*	—	—	*	—
W2	Salaries and Wages	*	—	*	—	—	*	—
B-1	Interest Income	*	—	*	—	—	*	—
B-2	Dividend Income	*	—	*	—	—	*	—
B-3	Seller Financed Mortgage Interest	X	—	X	—	—	X	—
B-4	REMICs	X		X		X	X	X
D	Schedule D	X	—	X	—	—	X	—
InfoD	Stocks, Securities	X	—	X	—	—	X	—
Broker	Consolidated Broker Statement	*	*	*	*	*	*	*
Income	Other Income	X	—	X	—	—	X	—
1099M	Miscellaneous Income	X	—	X	—	—	X	—
1099P	Distributions from Cooperatives	X	—	X	—	—	X	—
1099C	Cancellation of Debt	X		X		X	X	X
W2G	Gambling Winnings	*	—	*	—	—	*	—
2439	SH Undistributed LT Capital Gains	X		X		X	X	X
6781	Contracts & Straddles	X		X		X	X	X
FEC	Foreign Employer Compensation	X		X		X	X	X
1099R	Pensions and Annuity	*	—	*	—	—	*	—

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			Criteria met	Criteria not met	(Forced)	Criteria met	Criteria not met	(Forced)
SSA1099	Social Security & Tier 1 Railroad Benefits	X	—	X	—	—	X	—
C-1	Schedule C Income	X		X		X	X	X
C-2	Schedule C Expenses	X		X		X	X	X
C-3	Schedule C Carryovers	X		X		X	X	X
Rent	Rent & Royalty	X		X		X	X	X
Rent-2	Rent & Royalty, P2	X		X		X	X	X
F-1	Farm Income	X		X		X	X	X
F-2	Farm Expenses	X		X		X	X	X
F-3	Farm Passive Information	X		X		X	X	X
4835	Farm Rental Income	X		X		X	X	X
4835-2	Farm Rental Expenses	X		X		X	X	X
K1-1	Partnership & S Corporations	*	—	*	—	—	*	—
K1T	Estates and Trusts	*	—	*	—	—	*	—
Home	Sale of Residence	X		X		X	X	X
InstPY	Prior Year Installment Sales	X		X		X	X	X
Sale	Sale of Business Property	X		X		X	X	X
8824	Like-Kind Exchange	X		X		X	X	X
2555	Foreign Earned Income Excl	X		X		X	X	X
2555-2	Foreign Earned Income Exclusion	X		X		X	X	X
5498SA	Health, Medical Account Contributions	X		X		X	X	X
1099SA	Health, Medical Account Distributions	X		X		X	X	X
IRA	IRA Contributions	X	—	X	—	—	X	—

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			Criteria met	Criteria not met	(Forced)	Criteria met	Criteria not met	(Forced)
Keogh	Keogh, SEP and SIMPLE Plan Contributions	X		X		X	X	X
3903	Moving Expenses	X	—	X	—	—	X	—
OtherAdj	Other Adjustments	X	—	X	—	—	X	—
Educate	Series EE Bond Exclusion	X		X		X	X	X
Educate2	Student Loans	X	—	X	—	—	X	—
Educate3	Education Credits	X		X		X	X	X
1099Q	Qualified Education Programs	*	—	*	—	—	*	—
FAFSA	Federal Student Aid Application Information	X		X		X	X	X
A-1	Medical and Tax Expenses	X	—	X	—	—	X	—
A-2	Interest Expenses	X	—	X	—	—	X	—
A-3	Contributions and Miscellaneous Deductions	X	—	X	—	—	X	—
A-St	Miscellaneous Deductions (State Use Only)	X	—	X	—	—	X	—
MortgInt	Home Mortgage Limitation	X		X		X	X	X
2106	Employee Business Expense	X		X		X	X	X
2106-2	Employee Auto Expenses	X		X		X	X	X
8283	Noncash Contributions	X		X		X	X	X
1098C	Contributions of Motor Vehicles, Boats, Airplane	X		X		X	X	X
4684B	Business Casualty and Theft	X		X		X	X	X
4684P	Personal Casualty	X		X		X	X	X
4684PY	Prior Year Business Casualty and Theft	X		X		X	X	X
CasPY	Prior Year Personal Casualty and Theft	X		X		X	X	X

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8829	Home Office Use	X		X		X	X	X
Auto	Auto Information	X		X		X	X	X
OtherTax	Unreported Social Security & Medicare Tax	X		X		X	X	X
Coverage	Health Coverage Taxes and Exemptions	X		X		X	X	X
Clergy	Minister, Clergy and Religious Worker	X		X		X	X	X
1099QA	ABLE Account Information	X		X		X	X	X
8615	Tax on Children with Investment Income	X		X		X	X	X
8814	Parent's Election to Report Child's Interest	X		X		X	X	X
H	Household Employment Taxes	X		X		X	X	X
5405	First-Time Home Buyer Credit Repayment	X		X		X	X	X
2441	Child and Dependent Care Credit	X	—	X	—	—	X	—
R	Credit for Elderly or Disabled	X		X		X	X	X
5695	Residential Energy Credit	X		X		X	X	X
1116	Foreign Taxes	X		X		X	X	X
8839	Adoption Credit	X		X		X	X	X
1095-A	Form 1095-A, Health Insurance Marketplace Statement	X		X		X	X	X
4136	Fuel Tax Credit	X		X		X	X	X
4136-2	Fuel Tax Credit Pg 2	X		X		X	X	X
4136-3	Fuel Tax Credit Pg 3	X		X		X	X	X

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CO	Carryovers, Personal	X		X		X	X	X
COGBCr	Carryovers, Business	X		X		X	X	X
FarmLoss	Excess Farm Loss	X		X		X	X	X
NOLCO	Carryovers, Net Operating Loss	X		X		X	X	X
8938-2	Statement of Specified Foreign Financial Assets	X		X		X	X	X
Frgn Acct	Foreign Financial Accounts	X		X		X	X	X
	Custom Statements	—	—	—	—	—	—	—
OrgDp	Asset Listing / Disposition	X		X		X	X	X
OrgDp2	Asset Acquisition	X		X		X	X	X
	Asset Report	—	—	—	—	—	—	—
History	Tax Return History	X		X			X	X
AL	Alabama	X	X	X	X	X	X	X
AR	Arkansas	X	X	X	X	X	X	X
AZ	Arizona	X	X	X	X	X	X	X
CA	California	X	X	X	X	X	X	X
CA2	CA Residency/ELF	X	X	X	X	X	X	X
CO	Colorado	X	X	X	X	X	X	X
CT	Connecticut	X	X	X	X	X	X	X
DE	Delaware	X	X	X	X	X	X	X
DC	Dist. of Columbia	X	X	X	X	X	X	X
GA	Georgia	X	X	X	X	X	X	X
HI	Hawaii	X	X	X	X	X	X	X
ID	Idaho	X	X	X	X	X	X	X
IL	Illinois	X	X	X	X	X	X	X
IN	Indiana	X	X	X	X	X	X	X
IA	Iowa	X	X	X	X	X	X	X
KS	Kansas	X	X	X	X	X	X	X
KY	Kentucky	X	X	X	X	X	X	X
LA	Louisiana	X	X	X	X	X	X	X

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ME	Maine	X	X	X	X	X	X	X
MD	Maryland	X	X	X	X	X	X	X
MA	Massachusetts	X	X	X	X	X	X	X
MI	Michigan	X	X	X	X	X	X	X
MI2	Michigan, Credits	X	X	X	X	X	X	X
MI3	Michigan, Cities	X	X	X	X	X	X	X
MN	Minnesota	X	X	X	X	X	X	X
MS	Mississippi	X	X	X	X	X	X	X
MO	Missouri	X	X	X	X	X	X	X
MT	Montana	X	X	X	X	X	X	X
NE	Nebraska	X	X	X	X	X	X	X
NH	New Hampshire	X	X	X	X	X	X	X
NJ	New Jersey	X	X	X	X	X	X	X
NM	New Mexico	X	X	X	X	X	X	X
NY	New York	X	X	X	X	X	X	X
NC	North Carolina	X	X	X	X	X	X	X
ND	North Dakota	X	X	X	X	X	X	X
OH	Ohio	X	X	X	X	X	X	X
OK	Oklahoma	X	X	X	X	X	X	X
OR	Oregon	X	X	X	X	X	X	X
PA	Pennsylvania	X	X	X	X	X	X	X
RI	Rhode Island	X	X	X	X	X	X	X
SC	South Carolina	X	X	X	X	X	X	X
TN	Tennessee	X	X	X	X	X	X	X
UT	Utah	X	X	X	X	X	X	X
VT	Vermont	X	X	X	X	X	X	X
VA	Virginia	X	X	X	X	X	X	X
WV	West Virginia	X	X	X	X	X	X	X
WI	Wisconsin	X	X	X	X	X	X	X
Notes	Client Notes	—	—	—	—	—	—	—