UltraTax CS® Supported Forms & Fields PDF

In this document are all the supported forms for GruntWorx Populate Products. Fields with a green check populate into the Source Data Entry program for import into UltraTax CS. Fields that do not have the checkmark are not supported for population.

Click on a form below to go directly to the page:

If you have any additional questions, you can reach us at:
Sales@GruntWorx.com • Support@GruntWorx.com
877.830.6059 • x**2** for Sales • x**3** for Support

GruntWorx® Customer Success

W-2

Box	Field Name	Supported
a	Employee's social security number	✓
b	Employer's federal ID number	✓
c	Employer's name	
	Employer's name and address	✓
d	Control Number	
e	Employee's first and last name	
f	Employee's name and address	
1	Wages, tips, other compensation	✓
2	Federal income tax withheld	✓
3	Social security wages	✓
4	Social security tax withheld	✓
5	Medicare wages and tips	✓
6	Medicare tax withheld	✓
7	Social security tips	✓
8	Allocated tips	✓
9		
10	Dependent care benefits	✓
11	Nonqualified plans	✓
12	a	✓
	b	✓
	c	✓
	d	✓
	e	
13	Statutory Employee/Retire Plan/Sick Pay	✓
14	Other	✓
15	State	✓
	Employer's state ID number	✓
16	State wages, tips, etc.	✓
17	State income tax	✓
18	Local wages, tips, etc.	✓
19	Local income tax	✓
20	Locality name	✓

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W-2G

Box	Field Name	Supported
	Corrected	
	Payer's name	
	Payer's name and address	✓
	Payer's federal ID number	✓
	Payer's telephone number	
	Winner's name and address	
1	Reportable winnings	✓
2	Date won	✓
3	Type of wager	✓
4	Federal income tax withheld	✓
5	Transaction	✓
6	Race	✓
7	Winnings from identical wagers	✓
8	Cashier	✓
9	Winner's tax identification number	✓
10	Window	✓
11	First ID	✓
12	Second ID	✓
13	ST/Payer's state identification number	✓
14	State winnings	✓
15	State income tax withheld	✓
16	Local winnings	✓
17	Local income tax withheld	✓
18	Name of locality	✓

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1095-A

Box	Field Name	Supported
1	Marketplace identifier	✓
2	Marketplace assigned policy number	✓
3	Policy issuer name	✓
4	Recipient's name	
5	Recipient's social security number	✓
6	Recipient's date of birth	
7	Recipient's spouse's name	
8	Recipient's spouse's SSN	
9	Recipient's spouse's DOB	
10	Policy start date	
11	Policy termination date	
12	Street address	
13	City or town	
14	State or province	
15	Country and ZIP or foreign postal code	
Coverage Household:		
A	Name**	
B	Social security number	✓
C	Date of birth**	
D	Start date	✓
E	Termination date	✓
Household Information:		
A	Monthly premium amount	✓
B	Monthly premium amount of SLCSP	✓
C	Monthly advance payment of premium tax credit	✓

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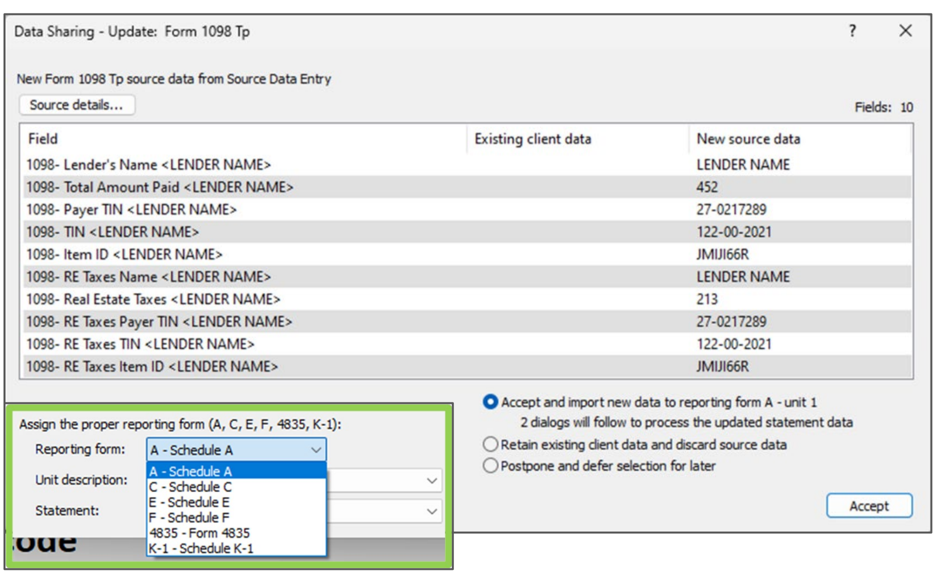
1098 Mortgage

Box	Field Name	Supported
	Corrected	
	Recipient/Lender's name	✓
	Recipient/Lender's name and address	
	Recipient/Lender's TIN	✓
	Payer's/Borrower's SSN	✓
	Payer's/Borrower's name and address	
	Account number	
1	Mortgage interest	✓
2	Outstanding mortgage principal	
3	Mortgage origination date	
4	Refund of overpaid interest	✓
5	Mortgage insurance premiums	✓
6	Points paid	✓
7	Address of property checkbox	
8	Address or description of property	
9	# of properties securing the mortgage	
10	Other	
11	Mortgage acquisition date	
	Real estate taxes paid	✓

Before Accepting the new 1098 Mortgage record from Pending Updates in the client's return, you have an opportunity to assign the 1098 to the proper reporting form (A, C, E, F, 4835, or K-1). This must be done through Data Sharing.



1098-E

Box	Field Name	Supported
	Corrected	
	Recipient/Lender's name	✓
	Recipient/Lender's name and address	
	Recipient's TIN	✓
	Borrower's SSN	✓
	Borrower's name	
	Borrower's address	
	Account number	
1	Student loan interest received by lender	✓
2	Box 1 does NOT include loan origination fees and/or capitalized interest for loans made before September 1, 2004 checkbox	

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1098-T

Box	Field Name	Supported
	Corrected	
	Filer's name	
	Filer's name and address	✓
	Filer's employer ID number	✓
	Student's SSN	✓
	Student's name	
	Student's address	
	Service provider/Account number	
1	Payments received for qualified tuition and related expenses	✓
4	Adjustments made for a prior year	✓
5	Scholarships or grants	✓
6	Adjustments to scholarships or grants for a prior year	✓
7	Amount includes an academic period beginning Jan-March (current year) checkbox	✓
8	Half-time student checkbox	✓
9	Graduate student checkbox	✓
10	Insurance contract reimbursement/refund	✓

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1099-B

Box	Field Name	Supported
	Payer name	✓
	Payer's federal ID number	✓
	Account number	✓
	Recipient's social security number	✓
	Statement date	
	Quantity sold	✓
	Share price	
1a	Description of property	✓
1b	Date acquired	✓
1c	Date sold	✓
1d	Net proceeds	✓
1e	Cost or other basis	✓
1g	Wash sale loss disallowed	✓
2	Type of gain or loss	✓
	Capital gain/loss	✓
4	Federal income tax withheld	✓
5	Noncovered security checkbox	✓
12	Basis reported to the IRS checkbox	✓

GruntWorx® Customer Success

1099-DIV

Box	Field Name	Supported
	Corrected	
	Payer's name	✓
	Payer's name and address	
	Payer's federal ID number	✓
	Recipient's social security number	✓
	Recipient's name and address	
	Account number	
	Fund name	✓
1a	Total ordinary dividends	✓
1b	Qualified dividends	✓
2a	Total capital gain distribution	✓
2b	Unrecap. Sec. 1250 gain	✓
2c	Section 1202 gain	✓
2d	Collectibles (28%) gain	✓
2e	Sec 897 Dividends	
2f	Sec 897 Cap Gain	
3	Nondividend distributions	✓
4	Federal income tax withheld	✓
5	Section 199A dividends	✓
6	Investment expenses	✓
7	Foreign tax paid	✓
8	Foreign country or U.S. possession	
9	Cash liquidation distributions	✓
10	Noncash liquidation distributions	✓
11	FATCA filing requirement	
12	Exempt-interest dividends	✓
13	Specified private activity dividends	✓
14	State	
15	State identification number	
16	State tax withheld	✓

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1099-G

Box	Field Name	Supported
	Corrected	
	Payer's name	✓
	Payer's name and address	
	Payer's federal ID number	✓
	Recipient's social security number	✓
	Recipient's name and address	
	Account number	
1	Unemployment compensation	✓
2	State or local income tax refunds, credits, or offsets	✓
3	Box 2 amount is for tax year	✓
4	Federal income tax withheld	✓
5	ATAA/RTAA payments	✓
6	Taxable grants	✓
7	Agriculture payments	✓
8	Trade or business income checkbox	✓
9	Market gain	✓
10a	State	
10b	State identification number	
11	State income tax withheld	✓

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1099-INT

Box	Field Name	Supported
	Corrected	
	Payer's name	✓
	Payer's name and address	
	Payer's federal ID number	✓
	Recipient's social security number	✓
	Recipient's name and address	
	Account number	
1	Interest income	✓
2	Early withdrawal penalty	✓
3	Int on US Savings Bonds and Treas. Obligations	✓
4	Federal income tax withheld	✓
5	Investment expenses	✓
6	Foreign tax paid	✓
7	Foreign country or U.S. possession**	
8	Tax-exempt interest	✓
9	Specified private activity bond interest	✓
10	Market discount	✓
11	Bond premium	✓
12	Bond premium on Treasury obligations	✓
13	Bond premium on tax-exempt bond	✓
14	Tax-exempt and tax credit bond CUSIP no.	
15	State	
16	State identification number	
17	State tax withheld	✓
	FATCA filing requirement	

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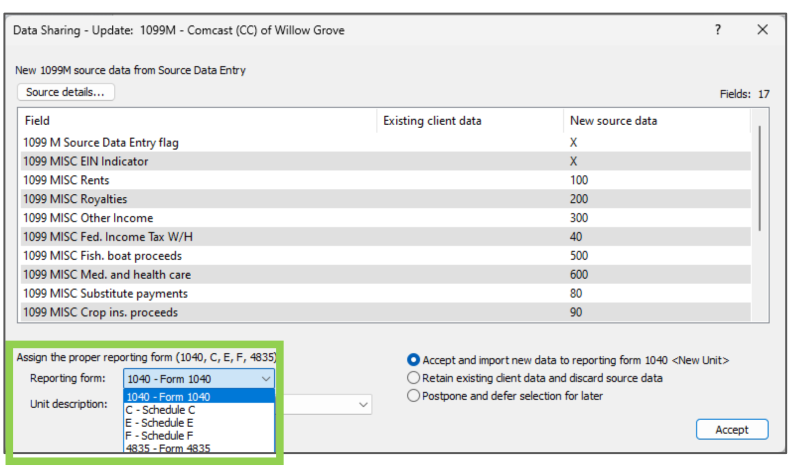
1099-MISC

Box	Field Name	Supported
	Corrected	
	Payer's name	✓
	Payer's name and address	
	Payer's federal ID number	✓
	Recipient's social security number	✓
	Recipient's name and address	
	Account number	
1	Rents	✓
2	Royalties	✓
3	Other income	✓
4	Federal income tax withheld	✓
5	Fishing boat proceeds	✓
6	Medical and health care payments	✓
7	Direct Sales checkbox	✓
8	Substitute payments in lieu of div or int	✓
9	Crop insurance proceeds	✓
10	Gross proceeds paid to attorney	✓
11	Fish purchased for resale	✓
12	Section 409A deferrals	✓
13	FATCA filing requirement checkbox	
14	Excess golden parachute payments	✓
15	Nonqualified deferred compensation	✓
16	State tax withheld	✓
17	State/Payer's state no.	✓
18	State income	✓



Before Accepting the new MISC record from Pending Updates in the client's return, you have an opportunity to assign it to the proper reporting form (1040, C, E, F, or 4835). This must be done through Data Sharing.

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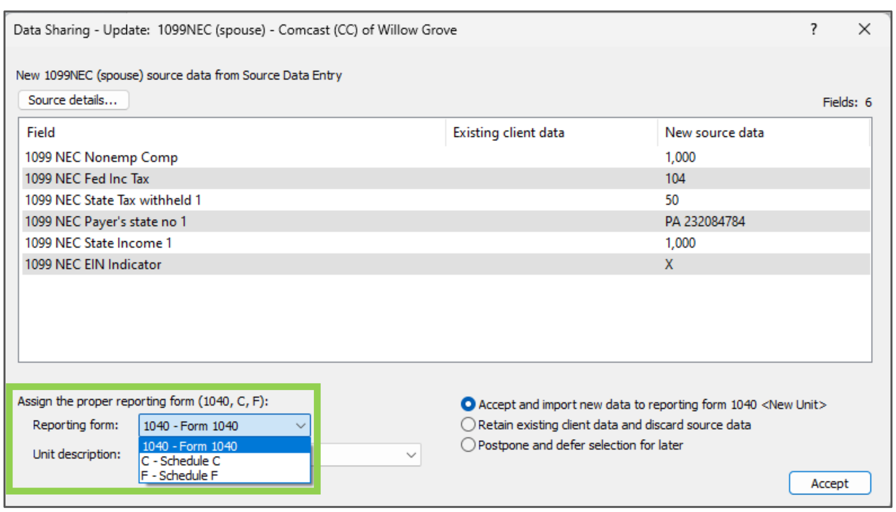
1099-NEC

Box	Field Name	Supported
	Corrected	
	Payer's Name	✓
	Payer's name and address	
	Payer's federal ID number	✓
	Recipient's social security number	✓
	Recipient's name and address	
	Account number	
1	Nonemployee compensation	✓
2	Direct Sales checkbox	
4	Federal income tax withheld	✓
5	State tax withheld	✓
6	State/Payer's state no.	✓
7	State income	✓

Before Accepting the new NEC record from Pending Updates in the client's return, you have an opportunity to assign it to the proper reporting form (1040, C or F). This must be done through Data Sharing.



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1099-OID

Box	Field Name	Supported
	Corrected	
	Payer's name	✓
	Payer's name and address	
	Payer's federal ID number	✓
	Recipient's social security number	✓
	Recipient's name and address	
	Account number	
1	Original issue discount	✓
2	Other periodic interest	✓
3	Early withdrawal penalty	✓
4	Federal income tax withheld	✓
5	Market discount	✓
6	Acquisition premium	✓
7	Description	
8	OID on U.S. treasury obligations	✓
9	Investment expenses	✓
10	Bond premium	✓
11	Tax-exempt OID	✓
12	State	
13	State ID number	
14	State tax withheld	
	FATCA filing requirement	

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1099-R

Box	Field Name	Supported
	Corrected	✓
	Payer's name	
	Payer's name and address	✓
	Payer's federal ID number	✓
	Recipient's social security number	✓
	Recipient's name and address	
	Account number	
1	Gross distribution	✓
2a	Taxable amount	✓
2b	Taxable amount not determined/Total distribution checkboxes	✓
3	Capital gain	✓
4	Federal income tax withheld	✓
5	Employee contributions	✓
6	Net unrealized appreciation	✓
7	Distribution code(s)**	✓
	IRA/SEP/SIMPLE checkbox	✓
8	Other	✓
	%	✓
9a	Your percentage of total distribution	✓
9b	Total employee contributions	✓
10	Amount allocable to IRR within 5 years	✓
11	1st year of desig. Roth contribution	✓
12	FATCA filing requirement	
13	Date of payment	
14	State tax withheld	✓
15	State/Payer's state ID number	✓
16	State distribution	✓
17	Local tax withheld	✓
18	Name of locality	✓
19	Local distribution	✓

RRB-1099

Box	Field Name	Supported
	Payer's federal ID number	
1	Claim number and Payee code	
2	Recipient's social security number	✓
	Recipient's name and address	
3	Gross social security equivalent benefit portion of Tier 1 paid	✓
4	Social security equivalent benefit portion of Tier 1 repaid to RRB	✓
5	Net social security equivalent benefit portion of Tier 1 paid/Employee Contributions	✓
6	Worker's compensation offset	✓
7	Social security equivalent benefit portion of Tier 1 paid for prior year	✓
8	Social security equivalent benefit portion of Tier 1 paid two years ago	✓
9	Social security equivalent benefit portion of Tier 1 paid for years prior more than two years ago	✓
10	Federal income tax withheld	✓
11	Medicare premium total	✓

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GruntWorx® Customer Success

SSA-1099

Box	Field Name	Supported
	Corrected	
1	Beneficiary's name	
2	Beneficiary's social security number	✓
3	Benefits paid	✓
4	Benefits repaid to SSA	✓
5	Net benefits	✓
6	Voluntary federal income tax withheld	✓
7	Beneficiary's address	
8	Claim number	
	Medicare premiums A	✓
	Medicare premiums B	✓
	Medicare premiums C	✓
	Medicare premiums D	✓

GruntWorx® Customer Success

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Consolidated 1099

Box	Field Name	Supported
	Payer name	✓
	Payer's federal ID number	✓
	Account number	✓
	Recipient social security number	✓
	Statement date	
Interest section		
1	Interest income	✓
2	Early withdrawal penalty	✓
3	Int. on U.S. Savings Bonds and Treas. Obligations	✓
4	Federal income tax withheld	✓
5	Investment expenses	✓
6	Foreign tax paid	✓
7	Foreign country or U.S. possession	
8	Tax-exempt interest	✓
9	Specified private activity bond interest	✓
10	Market discount	✓
11	Bond premium	✓
12	Bond premium on Treasury obligations	✓
13	Bond premium on tax-exempt bond	✓
Dividend section		
1a	Ordinary dividends	✓
1b	Qualified dividends	✓
2a	Total capital gain distribution	✓
2b	Unrecap. Sec. 1250 gain	✓
2c	Section 1202 gain	✓
2d	Collectibles (28%) gain	✓
2e	Sec 897 Dividends	
2f	Sec 897 Cap Gain	
3	Nondividend distributions	✓
4	Federal income tax withheld	✓
5	Section 199A dividends	✓
6	Investment expenses	✓
7	Foreign tax paid	✓
8	Foreign country or U.S. possession	
9	Cash liquidation distributions	✓

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Consolidated 1099 continued

Box	Field Name	Supported
Dividend section continued		
10	Noncash liquidation distributions	✓
12	Exempt-interest dividends	✓
13	Specified private activity dividends	✓
Original Issue Discount section		
1	Original issue discount	✓
2	Other periodic interest	✓
3	Early withdrawal penalty	✓
4	Federal income tax withheld	✓
5	Market discount	✓
6	Acquisition premium	✓
8	OID on treasury obligations	✓
9	Investment expenses	✓
10	Bond premium	✓
11	Tax-exempt OID	✓
Miscellaneous section		
2	Royalties	✓
3	Other income	✓
4	Federal income tax withheld	✓
8	Substitute payments in lieu of div or int	✓

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1041 K-1

Box	Field Name	Supported
	Final K-1	
	Amended K-1	
	Beginning date	
	Ending date	
A	Estate's or trust's employer ID number	✓
B	Estate's or trust's name	✓
C	Fiduciary's name and address	
D	Checkbox for form 1041-T and date	
E	Final 1041 checkbox	
F	Beneficiary's ID number	✓
G	Beneficiary's name and address	
H	Domestic or foreign beneficiary checkbox	
1	Interest income	✓
2a	Ordinary dividends	✓
2b	Qualified dividends	✓
3	Net short-term capital gain	✓
4a	Net long-term capital gain	✓
4b	28% rate gain	✓
4c	Unrecaptured section 1250 gain	✓
5	Other portfolio and nonbusiness income	✓
6	Ordinary business income	✓
7	Net rental real estate income	✓
8	Other rental income	✓
9	Directly apportioned deductions	✓
10	Estate tax deduction	✓
11	Final year deductions	✓
12	Alternative minimum tax adjustment	✓
13	Credits and credit recapture	✓
14	Other information	✓

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1065 K-1

Box	Field Name	Supported
	Final K-1	
	Amended K-1	
	Beginning date	
	Ending date	
A	Partnership's employer ID number	✓
B	Partnership's name	✓
B	Partnership's name and address	
C	IRS Center where partnership filed return	
D	Publicly traded partnership checkbox	✓
E	Partner's SSN or TIN	✓
F	Partner's name and address	
G	General or limited partner checkbox	
H	Domestic/Foreign partner checkbox	
	Disregarded entity checkbox	
I1	Type of entity	
I2	IRA/SEP/Keogh/etc. checkbox	
J	Partner's share of profit, loss and capital: beg. & end	
K	Partner's share of liabilities Beginning	
	Nonrecourse Ending	✓
	Qual nonrecourse financing Ending	✓
	Recourse Ending	✓
L	Partner's Capital Account Analysis	
M	Built-in gain/loss contributed property	
N	Partner's share of Net Unrecognized Sec. 704(c) Gain or (Loss)	
1	Ordinary business income (loss)	✓
2	Net rental real estate income (loss)	✓
3	Other net rental income (loss)	✓
4a	Guaranteed payments for services	✓
4b	Guaranteed payments for capital	✓
5	Interest income	✓

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1065 K-1 continued

Box	Field Name	Supported
6a	Ordinary dividends	✓
6b	Qualified dividends	✓
6c	Dividend equivalents	✓
7	Royalties	✓
8	Net short-term capital gain (loss)	✓
9a	Net long-term capital gain (loss)	✓
9b	Collectibles (28%) gain (loss)	✓
9c	Unrecaptured section 1250 gain	
10	Net section 1231 gain (loss)	✓
11	Other income (loss)	✓
12	Section 179 deduction+	
13	Other deductions	✓
14	Self-employment earnings (loss)	✓
15	Credits	✓
16	Schedule K-3 checkbox	
17	Alternative minimum tax (AMT) items	✓
18	Tax-exempt income and nondeductible expenses	✓
19	Distributions	✓
20	Other information	✓
21	Foreign taxes paid or accrued	✓
22	At-risk purposes checkbox	
23	Passive activity purposes checkbox	

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GruntWorx® Customer Success

1120S K-1

Box	Field Name	Supported
	Final K-1	
	Amended K-1	
	Beginning & Ending date	
A	Corporation's employer ID number	✓
B	Corporation's name	✓
B	Corporation's name and address	
C	IRS center where corp. filed return	
D	Corporation's total number of shares	
E	Shareholder's identifying number	✓
F	Shareholder's name and address	
G	Current year allocation %	
H	Shareholder's number of shares	
I	Loans from shareholder	
1	Ordinary business income	✓
2	Net rental estate income (loss)	✓
3	Other net rental income (loss)	✓
4	Interest income	✓
5a	Ordinary dividends	✓
5b	Qualified dividends	✓
6	Royalties	✓
7	Net short-term capital gain (loss)	✓
8a	Net long-term capital gain (loss)	✓
8b	Collectibles (28%) gain (loss)	✓
8c	Unrecaptured section 1250 gain	
9	Net section 1231 gain (loss)	✓
10	Other income (loss)	✓
11	Section 179 deduction	
12	Other deductions	✓
13	Credits	✓
14	Schedule K-3 is attached checkbox	
15	Alternative minimum tax (AMT) items	✓
16	Items affecting shareholder basis	✓
17	Other information	✓
18	At-risk purposes checkbox	
19	Passive activity purposes checkbox	

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