

KKC	1040	US	Client Information	1
Resident Status	Resident state as of 12/31 (last year) (2)			
	1=full year resident (1)			
	1=multi-state return (1)			
	State return(s) (i.e. CA, NY, etc.)			
Electronic return(s) (i.e. US, CA, NY, etc.)				
Filing Status	Filing status (see table) (1)			
	1=MFJ versus MFS comparison (1)			
	1=married filing separate and lived with spouse (1)			
	1=married filing separate and must itemize deductions (1)			
	Year spouse died, if qualifying widow(er) (in last two years) (4)			
Taxpayer	First name and initial (20)			
	Last name (20)			
	Title/suffix (5)			
	Social security no. (11)			
	Occupation (25)			
	Date of birth (m/d/y) (8)			
	Date of death (m/d/y) (8)			
	Dependency status (table) (1)			
	1=blind (1)			
Spouse	First name and initial (20)			
	Last name (20)			
	Title/suffix (5)			
	Social security no. (11)			
	Occupation (25)			
	Date of birth (m/d/y) (8)			
	Date of death (m/d/y) (8)			
	1=blind (1)			
	Address	1=use foreign format (1)		
In care of (40)				
Street address (40)				
Apartment number (10)				
City (22)				
State (2)				
ZIP code (10)				
Foreign Address	Region (20)			
	Postal code (15)			
	Country (20)			
Taxpayer Contact Information	Home phone (14)			
	Work phone (14)			
	Work extension (5)			
	Daytime phone (table) (1)			
	Mobile phone (14)			
	Pager number (25)			
	Fax number (14)			
	E-mail address (40)			
Spouse Contact Information	Home phone (14)			
	Work phone (14)			
	Work extension (5)			
	Daytime phone (table) (1)			
	Mobile phone (14)			
	Pager number (25)			
	Fax number (14)			
	E-mail address (40)			

Filing Status

1 = Single
 2 = Married filing joint
 3 = Married filing separate
 4 = Head of household
 5 = Qualifying widow(er)

Daytime Phone

1 = Work
 2 = Home

Dependent Status

1 = Not applicable
 2 = Taxpayer could be a dependent
 3 = Taxpayer claimed as a dependent

KKC	1040	US	Client Information (continued)	1 p2
Miscellaneous	Salutation [O]	(40)		Prepared By 1 = Firm 2 = Non-paid preparer 3 = Self-prepared
	Custom filter	(20)		
	Firm number	(2)		
	Preparer number	(2)		
	Designee no., if different	(2)		
	Staff preparer number	(2)		
	Prepared by (see table)	(1)		
	Database report state	(2)		
	Promise date	(8)		
	Priority	(6)		
	Primary contact	(40)		

KKC	1040	US	Dependents	2
DEPENDENTS			# 1	# 2
First name	(20)			
Last name	(20)			
Title/suffix	(5)			
Date of birth (m/d/y)	(8)			
Date of death (m/d/y)	(8)			
Social security number	(11)			
Relationship (Table 1 or describe)	(13)			
Months lived at home	(2)			
Type of dependent (Table 2)	(1)			
Earned income credit (Table 3)	(1)			
Child tax credit (Table 4)	(1)			
1=added for Form 1040X	(1)			
Claimed by: 1=taxpayer, 2=spouse	(1)			
1=dependent exemption not claimed each year	(1)			
Exemption (Table 5)	(1)			
DEPENDENTS			# 4	# 5
First name	(20)			
Last name	(20)			
Title/suffix	(5)			
Date of birth (m/d/y)	(8)			
Date of death (m/d/y)	(8)			
Social security number	(11)			
Relationship (Table 1 or describe)	(13)			
Months lived at home	(2)			
Type of dependent (Table 2)	(1)			
Earned income credit (Table 3)	(1)			
Child tax credit (Table 4)	(1)			
1=added for Form 1040X	(1)			
Claimed by: 1=taxpayer, 2=spouse	(1)			
1=dependent exemption not claimed each year	(1)			
Exemption (Table 5)	(1)			
1 Relationship	2 Type of Dependent	3 Earned Income Credit	4 Child Tax Credit	5 Exemption
Adopted child	Nephew	1=Child at living w/ taxpayer (default)	1=When applicable (default)	1=Claim this year
Aunt	Niece	2=Child not living w/ taxpayer	2=Student age 19 to 23	2=Suppress this year
Brother	None	3=Dependent other than child	3=Disabled age 19 or older	3=Claim in odd years
Child	Other	4=HH only, not a dependent	4=Force	4=Claim in even years
Daughter	Parent	5=EIC only, not a dependent	5=Suppress	
Father	Sister			
Foster child	Son			
Grandchild	Stepchild			
Grandparent	Uncle			
Mother				

KKC	1040	US	Tel. Tax Refund / Misc. Info. / Direct Deposit					3.1		
REFUND OF FEDERAL TELEPHONE EXCISE TAX						TS	ST	Src		
Telephone tax refund: 1=force, 2=suppress [O]			54							
MISCELLANEOUS										
Presidential campaign: 1=self, 2=spouse, 3=both, 4=neither, 5=blank [O]			1							
Designee/ IRS Discussion			Allow discussion: 1=yes, 2=no, 3=blank [O]	17						
			Designee's name [O]	61						(28)
			Designee's phone number [O]	62						(14)
			Designee's PIN (5 digit numeric) [O]	63						(5)
1040 label: 1=IRS format, 2=standard (address chg) [O]			2							
Text style: 1=mixed case, 2=upper case [O]			3							
Daytime phone: 1=print, 2=print (suppress when opt.), 3=suppress [O]			26							
Tax filing envelope: 1=6 x 9, 2=9 1/2 x 11 1/2 [O]			27							
Form 1040A: 1=when applicable, 2=suppress [O]			4							
Form 1040EZ: 1=when applicable, 2=suppress [O]			5							
Form 1040NR-EZ: 1=when applicable, 2=suppress [O]			25							
Form 1040-V: 1=when applicable, 2=suppress [O]			6							
Form 1040 payment (defaults to amount due) [O]			7							
Wage schedule: 1=with tax return, 2=with worksheets, 3=suppress [O]			8							
Basis schedule (table 1)			64							
Schedule of loss limitations (table 1)			65							
Effective tax rate: 1=when applicable, 2=suppress [O]			33							
1=debtor in Chapter 11 bankruptcy case filed after October 16, 2005			70							
1=MFS spouse exemption			10							
1=suppress spouse exemption on MFJ return			12							
HOH Spouse Exemption			First name of spouse	56						(20)
			Last name of spouse	57						(20)
			Social security number	58						(11)
1=preparer has confirmed that the IRS can now process extender impacted returns			74							
1=converted client (proforma use only)			14							
ORGANIZER MISCELLANEOUS										
1=suppress next year's client organizer			13							
Client organizer type (table 3)			387							
Tax return appointment date (m/d/y) [O]			1064							
Tax return appointment time [O]			1065							(10)
Tax return appointment location [O]			1066							(30)
						Hash Total (do not include date amounts)				3.1