

State Packages	1040/568 SMLLC, 1041, 1065, 1120, 1120S, and 990	
Electronic Filing	Individual (direct state)	Approved 11/15/2017
	Corporation and S Corporation	Approved 11/17/2017
	Partnership	Approved 11/17/2017
	Fiduciary	Approved 11/16/2017
	Tax Exempt	Approved 11/17/2017
Online Filing	Individual	Approved 11/17/2017

Individual

- Original return information flows automatically to amended returns once the current tax year return has been calculated
- Supports the annualized method and regular method of computing the underpayment penalty
- Generates worksheets from the CA instructions to support detailed calculations
- Ability to prepare estimated tax payments (CA Form 540ES) and extensions (CA Form 3519)
- Ability to pay via electronic funds withdrawal on a specific date
- Ability to pay estimated tax payments via electronic funds withdrawal (with e-filed return)
- Ability to direct deposit refund
- Offers several specialized worksheets to show taxpayer and spouse amounts split out for certain items
- CA Form 568 is now supported in the Individual package for e-file
- Special calculations:
 - Depreciation differences
 - Credit for taxes paid to other states
 - Passive Activities
 - Penalty Calculations

Business

- Includes corporation, S corporation, partnership, limited liability companies, tax-exempt, and fiduciary returns
- Supports the annualized method and regular method of computing the underpayment penalty
- Provides simultaneous multistate processing capabilities
- Generates worksheets from the CA instructions to support detailed calculations
- Ability to prepare estimated tax payments (CA Form 100ES) and extensions (CA Form 3539)
- Supports CA Form 199 in the Corporation package
- Special calculations:
 - Depreciation differences
 - Penalty Calculations (100 and 100S)

Electronic Filing Features

- A fully integrated e-file module for the CA 540, CA 100, CA 565/568, CA 100S, CA 541
- e-File software identifies and corrects many errors, cutting the time spent processing returns and waiting for refunds

(continued next page)

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- Direct debit available for e-filed returns with a balance due
- California corporate and partnership amended returns e-fileable
- California 100 returns with federal 1120-H e-fileable
- California 568 SMLLC returns e-fileable

Individual:

Form	Description	Pages
• 540	Resident Income Tax Return	5
	▪ CAWK_47 Other gains & losses Worksheet	1
	▪ CAWK_A5 State & Local Taxes Paid Computation	1
	▪ CAWK_AC Credit for Child Adoption Costs Worksheet	1
	▪ CAWK_ADJ AGI Wks Line 36 Summary (Split)	1
	▪ CAWK_AGI Adjusted Gross Income Split	1
	▪ CAWK_DP Credit for Dependent Parent Worksheet	1
	▪ CAWK_E Rents, Royalties, Etc... Worksheet	1
	▪ CAWK_EXM AGI Limitation Worksheet	1
	▪ CAWK_EXP AGI Wks Line 24 Summary (Split)	1
	▪ CAWK_HH Credit for Senior Head of Household Worksheet	1
	▪ CAWK_IRA Total IRA Distributions Worksheet	1
	▪ CAWK_JC Credit for Joint Custody Head of Household Worksheet	1
	▪ CAWK_MH Mental Health Worksheet	1
	▪ CAWK_MSR Military Spouse Residency Relief Act Wks	1
	▪ CAWK_NRC Nonrefundable Renters Credit Worksheet	1
	▪ CAWK_PEN Total Pensions and Annuities Worksheet	1
	▪ CAWK_REF State Taxable Refund Computation	1
	▪ CAWK_SDI Excess CA SDI or VPDJ Withheld Worksheet	1
	▪ CAWK_SE AGI Wks Line 27 Summary (Split)	1
	▪ CAWK_SSB AGI Wks Line 20B Summary (Split)	1
	▪ CAWK_TEI Tax Exempt Interest Worksheet	1
	▪ CAWK_USE Use Tax Worksheet	1
	▪ CA_ATT00 thru CA_ATT04 - Overflow Statements	1
• 5402EZ	Resident EZ Income Tax Return	4
	▪ CAWK_2EZ - Dependent Tax Worksheet	1
• 540NR	Non-resident Main Form	4
	▪ CAWK_47 Other gains & losses Worksheet	1
	▪ CAWK_A5 State & Local Taxes Paid Computation	1
	▪ CAWK_AC Credit for Child Adoption Costs Worksheet	1
	▪ CAWK_ADJ AGI Wks Line 36 Summary (Split)	1
	▪ CAWK_AGI Adjusted Gross Income Split	1
	▪ CAWK_DP Credit for Dependent Parent Worksheet	1
	▪ CAWK_E Rents, Royalties, Etc... Worksheet	1
	▪ CAWK_EXM AGI Limitation Worksheet	1
	▪ CAWK_EXP AGI Wks Line 24 Summary (Split)	1
	▪ CAWK_HH Credit for Senior Head of Household Worksheet	1
	▪ CAWK_IRA Total IRA Distributions Worksheet	1
	▪ CAWK_JC Credit for Joint Custody Head of Household Worksheet	1
	▪ CAWK_MH Mental Health Worksheet	1
	▪ CAWK_MSR Military Spouse Residency Relief Act Wks	1
	▪ CAWK_NRC Nonrefundable Renters Credit Worksheet	1
	▪ CAWK_PEN Total Pensions and Annuities Worksheet	1
	▪ CAWK_REF State Taxable Refund Computation	1
	▪ CAWK_SDI Excess CA SDI or VPDJ Withheld Worksheet	1
	▪ CAWK_SE AGI Wks Line 27 Summary (Split)	1
	▪ CAWK_SSB AGI Wks Line 20B Summary (Split)	1
	▪ CAWK_TEI Tax Exempt Interest Worksheet	1
	▪ CAWK_USE Use Tax Worksheet	1
	▪ CA_ATT05 thru CA_ATT08 - Overflow Statements	1
• 540NRS	Nonresident/Part Year Short Form	4
• 540ES	Declaration of Estimated Income Tax	4
	▪ CA_ETA CA Estimated Tax Worksheet for Next Year	1

	▪ CA_ATT09	Estimate Explanation Statement	1
• 3503		Natural Heritage Preservation Credit	2
• 3504		Enrolled Tribal Member Certification	1
	▪	Overflow Statements	3
• 3506		Child and Dependent Care Expenses Credit	2
	▪	CA_ATT46 thru CA_ATT50 - Overflow Statements	1
• 3507		Prison Inmate Labor Credit	1
• 3510		Credit for Prior Year Alternative Minimum Tax	1
	▪	WK3510 AMT Worksheet for Married Filing Separate	1
• 3514		CA Earned Income Tax Credit	2
	▪	CAWKEIC1 EIC Worksheet Investment Income	1
	▪	CAWKEIC3 EIC Worksheet Business Income (Loss)	1
	▪	CAWKEIC6 EIC Worksheet	1
• 3519		Extension Payment Voucher	2
• 3520 (PIT)		Power of Attorney	4
• 3521		Low-Income Housing Credit	2
• 3523		Research Credit	3
	▪	CAWK3523 Research Credit Worksheets (1 - 2)	1
	▪	CA_ATT92-93 - Overflow Statements	1
• 3525		Substitute Income Statement	2
• 3526		Investment Interest Expense Deduction	1
• 3531		California Competes Tax Credit	1
	▪	CAWK3531 Tax Credit Earned Worksheet	1
	▪	CAWK3531 Tax Credit Received from Pass-Throughs	1
	▪	CAWK3531 Tax Credit Claimed Worksheet	1
• 3532		Head of Household Filing Status Schedule	1
	▪	4803Q1 Head of Household Schedule – Questionnaire	1
	▪	4803Q2 Head of Household Schedule – Questionnaire	1
	▪	4803Q3 Head of Household Schedule – Questionnaire	1
• 3540		Credit Carryover Summary	1
	▪	CA_ATT52 - Overflow Statement	1
• 3541		Motion Picture and Television Production Credit	2
	▪	Overflow attachment	2
• 3546		Enhanced Oil Recovery Credit	1
• 3547		Donated Agricultural Products Transportation Credit	1
• 3548		Disabled Access Credit for Eligible Small Business	1
• 3554		New Employment Credit	1
	▪	CAWK_54 Tentative employment credit worksheet	1
• 3567		Installment Agreement Request	1
• 3582V		Electronic Payment Voucher	1
• 3592		College Access Tax Credit	1
• 3596		Paid Preparer’s CA Earned Income Tax Credit Checklist	2
• 3800		Children Investment Income	1
	▪	CAWK3800 Investment Income Line 1	1
	▪	CAWK3800 Investment Income Line 9	1
	▪	CAWK3800 Investment Income Line 10	1
	▪	CAWK3800 Investment Income Line 15	1
	▪	CAWK3800 Investment Income Line 17	1
• 3801		Passive Activity Loss Limitations	4
	▪	CAWK3801 Form 3801 Worksheet 1	1
	▪	CAWK3801 Form 3801 Worksheet 2	1
	▪	CAWK3801 Form 3801 Worksheet 3	1
	▪	CAWK3801 Form 3801 Worksheet 4	1
	▪	CAWK3801 Form 3801 Worksheet 5	1
	▪	CA3801PT PTP Worksheet	1
	▪	CA_ATT54-57 Overflow Statements	1
• 3803		Parent’s Election to Report Child’s Interest and Dividends	1
	▪	CA_ATT58-62 Overflow Statements	1
• 3805E		Installment Sale Income	2
	▪	CAWK_05E Installment Sale Income Summary Worksheet	1
	▪	CA_ATT94 Overflow Statement	1

• 3805P	IRA & Pension Penalties	1
• 3805V	NOL Computation and NOL and Disaster Loss Limitations	4
	▪ CA_ATT63-64 Overflow Statements	1
• 3805Z	Enterprise Zone Deduction and Credit Summary	2
	▪ CAWK_05Z EZ Hiring Credit & Recapture Worksheet IA	1
	▪ CAWK_05Z EZ Income or Loss Apportionment Worksheet IIA	1
	▪ CAWK_05Z EZ Income or Loss Apportionment Worksheet IIB	1
	▪ CAWK_05Z EZ Computation of NOL Carryover Worksheet III	1
	▪ CAWK05Z (1-3) Overflow Statements	1
• 3806	Los Angeles Revitalization Zone Deduction and Credit Summary	1
	▪ CAWK3806 LARZ Income or Loss Worksheet I, Page 2	1
	▪ CAWK3806 LARZ NOL Worksheet II	1
	▪ CAWK06 Overflow Statement	1
• 3807	LAMBRA Deduction & Credit Summary	2
	▪ CAWK3807 LAMBRA Hiring & Recapture Worksheet I	1
	▪ CAWK3807 LAMBRA Apportionment Worksheet III Section A	1
	▪ CAWK3807 LAMBRA Apportionment Worksheet III Section B	1
	▪ CAWK3807 LAMBRA NOL Carryover Worksheet	1
	▪ CAWK07 (1-2) - Overflow Statements	1
• 3808	Manufacturing Enhancement Area Credit Summary	2
	▪ CAWK3808 MEA Hiring Credit & Recap Wks I	1
	▪ CAWK3808 MEA Income Apportionment Wks II	1
	▪ CAWK3808 MEA Income or Loss Apportionment Wks II Section B	1
	▪ CAWK08 (1-3) - Overflow Statements	1
• 3809	Targeted Tax Area Deduction and Credit Summary	2
	▪ CAWK3809 TTA Hiring Credit & Recapture Wks I	1
	▪ CAWK3809 TTA Income or Loss Apportionment	1
	▪ CAWK3809 TTA Income or Loss Apportionment Continued	1
	▪ CAWK3809 TTA NOL Carryover	1
	▪ CAWK09 (1-4) - Overflow Statements	1
• 3814	New Donated Fresh Fruits or Vegetables	1
	▪ Overflow Attachment	1
• 3840	Like Kind Exchanges	2
• 3885A	Depreciation and Amortization	1
	▪ CAWK_179 Section 179 worksheet CA3885 (CA3885A)	1
	▪ CADEPDIF CA Depreciation Differences	1
	▪ CAGAIN~ CA Gain Attachment	1
	▪ CA_ATT65-67 Overflow Statements	1
• 5805	Underpayment of Estimated Tax	4
	▪ CAWK5805 Penalty Worksheet	1
	▪ CA_ATT95 Overflow Statement	1
• 5805F	Underpayment of Estimated for Farmers	1
	▪ CA_ATT96 Overflow Statement	1
• 5870A	Tax on Accumulation Distribution of Trusts	2
	▪ CA_ATT97-99 Overflow Statements	1
• 592B	Nonresident Withholding Statement	1
• 593	Nonresident Withholding for Real Estate	1
• 8453	Electronic Filing Signature Form (OLF)	1
• 8454	Electronic Filing Option Out	1
• 8455	Electronic Filing Payment Record	1
	▪ CAWK_PAY Payment Information Worksheet	1
• 8879	Electronic Filing Signature Authorization	1
• 8886 (IRS)	Reportable Transaction Disclosure Statement	2
	▪ CA_ATT80-88 Overflow Statements	1
• Sch CA	Adjustments to Income (CA 540)	2
	▪ CAWK_CA Sch CA line 41 Educator Expense Worksheet	1
	▪ CAWK_CA7 Wages, Salaries, etc.	1
	▪ CAWK_ID Itemized Deduction Worksheet	1
	▪ CAWK_SD Standard Deduction Worksheet	1
	▪ CAWK_SL Student Loan Interest Deduction Worksheet	1
	▪ CA_ATT11-14 Overflow Statements	1

• Sch CANR	Nonresident Adjustments to Income (CA 540NR)	2
	▪ CANRCASE Line 27 Column E Worksheet	1
	▪ CAWK_CA Sch CA line 41 Educator Expense Worksheet	1
	▪ CAWK_CA7 Wages, Salaries, etc.	1
	▪ CAWK_ID Itemized Deduction Worksheet	1
	▪ CAWK_PY Part Year Resident Worksheet	1
	▪ CAWK_SD Standard Deduction Worksheet	1
	▪ CAWK_SL Student Loan Interest Deduction Worksheet	1
	▪ CA_ATT15-18 Overflow Statements	1
• Sch D	Capital Gain or Loss Adjustment (CA 540)	2
	▪ CAWK_D Capital Gains and Losses Worksheet	1
	▪ CAWK_CLC Capital Loss Carryover Worksheet	1
• Sch DNR	Nonresident Capital Gain or Loss Adjustment (CA 540NR)	1
	▪ CAWK_D Capital Gains and Losses Worksheet	1
	▪ CAWK_DNR Nonresident Capital Gain/Loss Worksheet	1
	▪ CAWK_CLC Capital Loss Carryover Worksheet	1
• Sch D1	Sales of Business Property	2
	▪ CA_ATT21-33 Overflow Statements	1
• Sch G1	Tax on Lump-Sum Distribution	1
	▪ CAWK_G1 Death Benefit Worksheet	1
	▪ CAWK_G1 Line 28 Worksheet	1
• Sch P	Alternative Minimum Tax and Credit Limitations (CA 540)	2
	▪ CAWK_AMT Alt Min Tax Worksheet	1
	▪ CAWK_TI Alt Min Taxable Income Worksheet	1
	▪ CA_ATT36-37 Overflow Statements	1
• Sch PNR	Nonresident Alternative Minimum Tax and Credit Limitations (CA 540NR)	3
	▪ CAWK_AMT Alt Min Tax Worksheet	1
	▪ CAWK_TI Alt Min Taxable Income Worksheet	1
	▪ CA_ATT38-39 Overflow Statements	1
• Sch R	Apportionment & Allocation of Income	4
	▪ CA_ATT90-91 Overflow Statements	1
• Sch RDP	Reg. Domestic Partner Recalculated AGI	1
	▪ CARDPATT Line 36 Other Adjustments Attachment	1
• Sch S	Other State Tax Credit	1
	▪ CA_ATT40 Overflow Statement	1
• Sch W2CG	W-2 Summary	2
• Sch X	Amended Individual Tax Return	1
• 3582X	Electronic Payment Voucher for Amended Returns	1
• 568	Single Member Limited Liability Company Return of Income	7
	▪ CA_SMATT SMLLC Explanation Attachment	1
• 568-T	Overflow of Non-Consenting Members	1
• 3522	Limited Liability Voucher	1
• 3536	Estimated Fee for LLCs	1
• 3537	Payment for Automatic Extension of LLCs	1
• 3588V	LLC Electronic Payment Voucher	1
• 592B	SMLLC Non-resident Withholding Statement	1
• 593	SMLLC Non-resident Withholding for Real Estate	1
• 8453L	SMLLC E-file Authorization	1
• Sch EO	Pass-Through Entity Ownership	1

Corporation:

Form	Description	Pages
• 100	Corporation Franchise or Income Tax Return	6
	▪ CAWK_CRP Line 14 worksheet	1
	▪ CAC_SCHQ Schedule Q Additional Information	1
	▪ CACRPATT 1-7 Corporate return attachments	7
	▪ CAWK_USE Use Tax Worksheet	1
• 100ES	Corporation Estimated Tax	4

• 100X	Amended Corporation Franchise or Income Tax Return	2
• 3503	Natural Heritage Preservation Credit	2
• 3507	Prison Inmate Labor Credit	1
• 3520 (B)	Power of Attorney	4
• 3521	Low-Income Housing Credit	2
• 3523	Research Credit	3
	▪ CAWK3523 Research Credit Worksheets (1 - 2)	1
	▪ CA_ATT92-93 - Overflow Statements	1
• 3531	California Competes Tax Credit	1
	▪ CAWK3531 Tax Credit Earned Worksheet	1
	▪ CAWK3531 Tax Credit Received from Pass-Throughs	1
	▪ CAWK3531 Tax Credit Claimed Worksheet	1
• 3533B	Change of Address for Business, Exempt Organizations, etc.	1
• 3539	Corporate Extension	1
• 3540	Credit Carryover Summary	1
	▪ CA_ATT52 - Overflow Statement	1
• 3541	Motion Picture and Television Production Credit	2
	▪ Overflow attachment	2
• 3544A	List of Assigned Credit Received	1
• 3546	Enhanced Oil Recovery Credit	1
• 3547	Donated Agricultural Products Transportation Credit	1
• 3548	Disabled Access Credit for Eligible Small Business	1
• 3554	New Employment Credit	1
	▪ CAWK_54 Tentative employment credit worksheet	1
• 3586V	Electronic Payment Voucher	1
• 3592	College Access Tax Credit	1
• 3593	Extension of Time for Payment by Corp. Expecting an NOL Carryback	1
• 3805E	Installment Sale Income	2
	▪ CAWK_05E Installment Sale Income Summary Worksheet	1
	▪ CA_ATT94 Overflow Statement	1
• 3805Q	NOL Computation and NOL and Disaster Loss Limitations	5
• 3805Z	Enterprise Zone Deduction and Credit Summary	2
	▪ CAWK_05Z EZ Hiring Credit & Recapture Worksheet IA	1
	▪ CAWK_05Z EZ Income or Loss Apportionment Worksheet IIA	1
	▪ CAWK_05Z EZ Computation of NOL Carryover Worksheet III	1
	▪ CAWK05Z (1-2) Overflow Statements	1
• 3806	Los Angeles Revitalization Zone Deduction and Credit Summary	1
	▪ CAWK3806 LARZ Income Apportionment Worksheet	1
	▪ CAWK3806 LARZ NOL Worksheet II	1
• 3807	LAMBRA Deduction & Credit Summary	2
	▪ CAWK3807 LAMBRA Hiring & Recapture Worksheet I	1
	▪ CAWK3807 LAMBRA Apportionment Worksheet III Section A	1
	▪ CAWK3807 LAMBRA NOL Carryover Worksheet	1
	▪ CAWK07 (1) - Overflow Statement	1
• 3808	Manufacturing Enhancement Area Credit Summary	2
	▪ CAWK3808 MEA Hiring Credit & Recap Wks I	1
	▪ CAWK3808 MEA Income Apportionment Wks II	1
	▪ CAWK08 (1-2) - Overflow Statements	1
• 3809	Targeted Tax Area Deduction and Credit Summary	2
	▪ CAWK3809 TTA Hiring Credit & Recapture Wks I	1
	▪ CAWK3809 TTA Income or Loss Apportionment	1
	▪ CAWK3809 TTA NOL Carryover	1
	▪ CAWK09 (1-3) - Overflow Statements	1
• 3814	New Donated Fresh Fruits or Vegetables	1
	▪ Overflow Attachment	1
• 3840	Like Kind Exchanges	2
• 3885	Depreciation and Amortization	1
	▪ CADEPDIF CA Depreciation Differences	1
	▪ CAGAIN~ CA Gain Attachment	1
	▪ CA_ATT67-69 Overflow Statements	1

• 592B	Non-resident Withholding Statement	1
• 593	Non-resident Withholding for Real Estate	1
• 5806	Underpayment of Estimated Tax by Corporations	3
• 8453C	Electronic Filing Signature Form	1
• Sch D1	Sales of Business Property	2
	▪ CA_ATT21-33 Overflow Statements	1
• Sch H	Corporate Dividend Income Deduction	1
	▪ Overflow statement for Part 1 & Part 3	2
• Sch P	Alternative Minimum Tax and Credit Limitations (CA 100)	2
	▪ CA_ATT36-37 Overflow Statements	1
• Sch R	Apportionment & Allocation of Income	7
	▪ Overflow Attachments	4
• 199	Tax Exempt Income Tax Return	2
	▪ CA199ATT CA Form 199 Statement	1
	▪ CA199ATT2-3 Questionnaire Attachments	2
• 3509	Political/Legislative Activities	1

S Corporation:

Form	Description	Pages
• 100S	S Corporation Franchise or Income Tax Return	6
	▪ CASBSATT Schedule F Line 12 Taxes Deducted	1
	▪ CASBSATT Schedule F Line 20 Other Deductions	1
	▪ CAWK_SBS Schedule K Line 19 Summary	1
	▪ CAWK_SBS Line 11 Page 1 Summary	1
	▪ CAWK_USE Use Tax Worksheet	1
• 100ES	Corporation Estimated Tax	4
• 100S-K1	Shareholder's Share of Income, Deductions, Credits, etc...	3
• 100X	Amended Corporation Franchise or Income Tax Return	2
• 3503	Natural Heritage Preservation Credit	2
• 3507	Prison Inmate Labor Credit	1
• 3520 (B)	Power of Attorney	4
• 3521	Low-Income Housing Credit	2
• 3523	Research Credit	3
	▪ CAWK3523 Research Credit Worksheets (1 - 2)	1
	▪ CA_ATT92-93 - Overflow Statements	1
• 3531	California Competes Tax Credit	1
	▪ CAWK3531 Tax Credit Earned Worksheet	1
	▪ CAWK3531 Tax Credit Received from Pass-Throughs	1
	▪ CAWK3531 Tax Credit Claimed Worksheet	1
• 3533B	Change of Address for Business, Exempt Organizations, etc	1
• 3539	Corporate Extension	1
• 3540	Credit Carryover Summary	1
	▪ CA_ATT52 - Overflow Statement	1
• 3541	Motion Picture and Television Production Credit	2
	▪ Overflow attachment	2
• 3544A	List of Assigned Credit Received	1
• 3546	Enhanced Oil Recovery Credit	1
• 3547	Donated Agricultural Products Transportation Credit	1
• 3548	Disabled Access Credit for Eligible Small Business	1
• 3554	New Employment Credit	1
	▪ CAWK_54 Tentative employment credit worksheet	1
• 3586V	Electronic Payment Voucher	1
• 3592	College Access Tax Credit	1
• 3593	Extension of Time for Payment by a Corp. expecting an NOL Carryback	1
• 3805E	Installment Sale Income	2
	▪ CAWK_05E Installment Sale Income Summary Worksheet	1
	▪ CA_ATT94 Overflow Statement	1
• 3805Q	NOL Computation and NOL and Disaster Loss Limitations	5
• 3805Z	Enterprise Zone Deduction and Credit Summary	2

	▪ CAWK_05Z	EZ Hiring Credit & Recapture Worksheet IA	1	
	▪ CAWK_05Z	EZ Income or Loss Apportionment Worksheet IIA	1	
	▪ CAWK_05Z	EZ Computation of NOL Carryover Worksheet III	1	
	▪ CAWK05Z	(1-2) Overflow Statements	1	
• 3806		Los Angeles Revitalization Zone Deduction and Credit Summary	1	
	▪ CAWK3806	LARZ Income Apportionment Worksheet	1	
	▪ CAWK3806	LARZ NOL Worksheet II	1	
• 3807		LAMBRA Deduction & Credit Summary	2	
	▪ CAWK3807	LAMBRA Hiring & Recapture Worksheet I	1	
	▪ CAWK3807	LAMBRA Apportionment Worksheet III Section A	1	
	▪ CAWK3807	LAMBRA NOL Carryover Worksheet	1	
	▪ CAWK07	(1) - Overflow Statement	1	
• 3808		Manufacturing Enhancement Area Credit Summary	2	
	▪ CAWK3808	MEA Hiring Credit & Recap Wks I	1	
	▪ CAWK3808	MEA Income Apportionment Wks II	1	
	▪ CAWK08	(1-2) - Overflow Statements	1	
• 3809		Targeted Tax Area Deduction and Credit Summary	2	
	▪ CAWK3809	TTA Hiring Credit & Recapture Wks I	1	
	▪ CAWK3809	TTA Income or Loss Apportionment	1	
	▪ CAWK3809	TTA NOL Carryover	1	
	▪ CAWK09	(1-3) - Overflow Statements	1	
• 3814		New Donated Fresh Fruits or Vegetables	1	
	▪	Overflow Attachment		1
• 3840		Like Kind Exchanges	2	
• 592B		Non-resident Withholding Statement	1	
• 593		Non-resident Withholding for Real Estate	1	
• 5806		Underpayment of Estimated Tax by Corporations	3	
• 8453C		Electronic Filing Signature Form	1	
• Sch B		Depreciation and Amortization	1	
	▪ CAWK_179	Section 179 worksheet CA3885 (CA3885A)	1	
	▪ CADEPDIF	CA Depreciation Differences	1	
	▪ CAGAIN~	CA Gain Attachment	1	
	▪ CA_ATT67, 70-71	Overflow Statements	1	
• Sch C		S Corporation Tax Credits	2	
• Sch D		S Corporation Capital Gains and Losses and Built-In Gains	1	
	▪	Overflow statement for Part 1 & Part 3		4
• Sch D1		Sales of Business Property	2	
	▪ CA_ATT21-33	Overflow Statements	1	
• Sch H		Corporate Dividend Income Deduction	1	
	▪	Overflow statement for Part 1, 2 & Part 3		3
• Sch QS		Qualified Subchapter S Subsidiary	1	
• Sch R		Apportionment & Allocation of Income	7	
	▪	Overflow Attachments		4

Partnership & LLC:

Form	Description	Pages	
• 565	Partnership Income Tax Return	5	
	▪ CAPTRATT	Other Deductions Attachment	1
	▪ CAWK_565	Schedule K Line 15F Col D summary	1
	▪ CAWK_565	Schedule K Line 21 Summary	1
	▪ CAWK_USE	Use Tax Worksheet	1
• 568	Limited Liability Company Tax Return	7	
	▪ CAPTRATT	Other Deductions Attachment	1
	▪ CAWK_568	Schedule K Line 15 Col D summary	1
	▪ CAWK_568	Schedule K Line 21 Summary	1
	▪ CAWK_USE	Use Tax Worksheet	1
• 3522ES	LLC Estimated Tax	1	
• 565-K1	Partner's Share of Income, Deductions, Credits, etc...	4	
• 568-K1	LLC's Share of Income, Deductions, Credits, etc...	4	
• 568-T	Overflow of Non-consenting Members	1	

• 3503	Natural Heritage Preservation Credit	2
• 3507	Prison Inmate Labor Credit	1
• 3520 (B)	Power of Attorney	4
• 3521	Low-Income Housing Credit	2
• 3522	Limited Liability Voucher	1
• 3523	Research Credit	3
	▪ CAWK3523 Research Credit Worksheets (1 - 2)	1
	▪ CA_ATT92-93 - Overflow Statements	1
• 3531	California Competes Tax Credit	1
	▪ CAWK3531 Tax Credit Earned Worksheet	1
	▪ CAWK3531 Tax Credit Received from Pass-Throughs	1
• 3533B	Change of Address for Business, Exempt Organizations, etc	1
• 3536	Estimated Fee for LLC's	1
• 3537	LLC Extension	3
• 3538	Partnership Extension	1
• 3541	Motion Picture and Television Production Credit	2
	▪ Overflow attachment	2
• 3546	Enhanced Oil Recovery Credit	1
• 3547	Donated Agricultural Products Transportation Credit	1
• 3548	Disabled Access Credit for Eligible Small Business	1
• 3554	New Employment Credit	1
	▪ CAWK_54 Tentative employment credit worksheet	1
• 3587V	Partnership Electronic Payment Voucher	1
• 3588V	LLC Electronic Payment Voucher	1
• 3592	College Access Tax Credit	1
• 3805E	Installment Sale Income	2
	▪ CAWK_05E Installment Sale Income Summary Worksheet	1
	▪ CA_ATT94 Overflow Statement	1
• 3805Z	Enterprise Zone Deduction and Credit Summary	2
	▪ CAWK_05Z EZ Hiring Credit & Recapture Worksheet IA	1
	▪ CAWK_05Z EZ Income or Loss Apportionment Worksheet IIA	1
	▪ CAWK_05Z EZ Computation of NOL Carryover Worksheet III	1
	▪ CAWK05Z (1-2) Overflow Statements	1
• 3806	Los Angeles Revitalization Zone Deduction and Credit Summary	1
	▪ CAWK3806 LARZ Income Apportionment Worksheet	1
• 3807	LAMBRA Deduction & Credit Summary	2
	▪ CAWK3807 LAMBRA Hiring & Recapture Worksheet I	1
	▪ CAWK3807 LAMBRA Apportionment Worksheet III Section A	1
	▪ CAWK3807 LAMBRA NOL Carryover Worksheet	1
	▪ CAWK07 (1) - Overflow Statement	1
• 3808	Manufacturing Enhancement Area Credit Summary	1
	▪ CAWK3808 MEA Hiring Credit & Recap Wks I	1
	▪ CAWK3808 MEA Income Apportionment Wks II	1
	▪ CAWK08 (1-2) - Overflow Statements	1
• 3809	Targeted Tax Area Deduction and Credit Summary	1
	▪ CAWK3809 TTA Hiring Credit & Recapture Wks I	1
	▪ CAWK3809 TTA Income or Loss Apportionment	1
	▪ CAWK09 (1-3) - Overflow Statements	1
• 3814	New Donated Fresh Fruits or Vegetables	1
	▪ Overflow Attachment	1
• 3832	LLC List of Members	3
• 3840	Like Kind Exchanges	2
• 3885L/P	Depreciation and Amortization	1
	▪ CAWK_179 Section 179 worksheet CA3885 (CA3885A)	1
	▪ CADEPDIF CA Depreciation Differences	1
	▪ CAGAIN~ CA Gain Attachment	1
	▪ CA_ATT67, 72 Overflow Statements	1
• 592B	Non-resident Withholding Statement	1
• 593	Non-resident Withholding for Real Estate	1
• 8453L/P	Electronic Filing Signature Form	1

• 565-D	Partnership Capital Gains and Losses and Built-In Gains	1
	▪ Overflow statement for Part 1 & Part 3	2
• 568-D	LLC Capital Gains and Losses and Built-In Gains	1
	▪ Overflow statement for Part 1 & Part 3	2
• Sch D1	Sales of Business Property	2
	▪ CA_ATT21-33 Overflow Statements	1
• Sch EO(565)	Pass-Through Entity Ownership	1
• Sch EO(568)	Pass-Through Entity Ownership	1
• Sch R	Apportionment & Allocation of Income	7
	▪ Overflow Attachments	4

Fiduciary:

Form	Description	Pages
• 541	Fiduciary Income Tax Return	4
	▪ CAWK_LN8 Line 8 Worksheet	1
	▪ CAWK_541 Line 23 Summary	1
	▪ CAWK_USE Use Tax Worksheet	1
• 541ES	Fiduciary Estimated Tax	4
• 541-K1	Fiduciary Share of Income, Deductions, Credits, etc...	1
	▪ CAWK_K1 Benefit Share of Income Worksheet	1
• 3503	Natural Heritage Preservation Credit	2
• 3507	Prison Inmate Labor Credit	1
• 3510	Credit for Prior Year Alternative Minimum Tax	1
• 3520 (PIT)	Power of Attorney	4
• 3521	Low-Income Housing Credit	2
• 3523	Research Credit	3
	▪ CAWK3523 Research Credit Worksheets (1 - 2)	1
	▪ CA_ATT92-93 - Overflow Statements	1
• 3526	Investment Interest Expense Deduction	1
• 3531	California Competes Tax Credit	1
	▪ CAWK3531 Tax Credit Earned Worksheet	1
	▪ CAWK3531 Tax Credit Received from Pass-Throughs	1
	▪ CAWK3531 Tax Credit Claimed Worksheet	1
• 3533B	Change of Address for Business, Exempt Organizations, etc	1
• 3540	Credit Carryover Summary	1
	▪ CA_ATT52 - Overflow Statement	1
• 3541	Motion Picture and Television Production Credit	2
	▪ Overflow attachment	2
• 3546	Enhanced Oil Recovery Credit	1
• 3547	Donated Agricultural Products Transportation Credit	1
• 3548	Disabled Access Credit for Eligible Small Business	1
• 3554	New Employment Credit	1
	▪ CAWK_54 Tentative employment credit worksheet	1
• 3563	Fiduciary Extension	2
• 3592	College Access Tax Credit	1
• 3805E	Installment Sale Income	2
	▪ CAWK_05E Installment Sale Income Summary Worksheet	1
	▪ CA_ATT94 Overflow Statement	1
• 3805V	NOL Computation and NOL and Disaster Loss Limitations	4
	▪ CA_ATT63-64 Overflow Statements	1
• 3805Z	Enterprise Zone Deduction and Credit Summary	2
	▪ CAWK_05Z EZ Hiring Credit & Recapture Worksheet IA	1
	▪ CAWK_05Z EZ Income or Loss Apportionment Worksheet IIA	1
	▪ CAWK_05Z EZ Computation of NOL Carryover Worksheet III	1
	▪ CAWK05Z (1-2) Overflow Statements	1
• 3806	Los Angeles Revitalization Zone Deduction and Credit Summary	1
	▪ CAWK3806 LARZ Income Apportionment Worksheet	1
• 3807	LAMBRA Deduction & Credit Summary	2
	▪ CAWK3807 LAMBRA Hiring & Recapture Worksheet I	1
	▪ CAWK3807 LAMBRA Apportionment Worksheet III Section A	1
	▪ CAWK3807 LAMBRA NOL Carryover Worksheet	1

• 3808	▪ CAWK07 (1) - Overflow Statement	1	
	Manufacturing Enhancement Area Credit Summary	2	
	▪ CAWK3808 MEA Hiring Credit & Recap Wks I	1	
	▪ CAWK3808 MEA Income Apportionment Wks II	1	
	▪ CAWK08 (1-2) - Overflow Statements	1	
• 3809	Targeted Tax Area Deduction and Credit Summary	2	
	▪ CAWK3809 TTA Hiring Credit & Recapture Wks I	1	
	▪ CAWK3809 TTA Income or Loss Apportionment	1	
	▪ CAWK09 (1-3) - Overflow Statements	1	
• 3814	New Donated Fresh Fruits or Vegetables	1	
	▪ Overflow Attachment		1
• 3840	Like Kind Exchanges	2	
• 3843	Fiduciary e-file Payment Voucher	1	
• 3885F	Depreciation and Amortization	1	
	▪ CADEPDIF CA Depreciation Differences	1	
	▪ CAGAIN~ CA Gain Attachment	1	
	▪ CA_ATT72 Overflow Statements	1	
• 5805	Underpayment of Estimated Tax	4	
	▪ CA_ATT95 Overflow Statement	1	
• 5805F	Underpayment of Estimated for Farmers	1	
• 592B	Non-resident Withholding Statement	1	
• 593	Non-resident Withholding for Real Estate	1	
• 541-D	Fiduciary Capital Gains and Losses and Built-In Gains	1	
	▪ Overflow statement	1	
• 8453F	E-file authorization for fiduciaries	1	
• Sch D1	Sales of Business Property	2	
	▪ CA_ATT21-33 Overflow Statements	1	
• Sch G1	Tax on Lump-Sum Distribution	1	
	▪ CAWK_G1 Death Benefit Worksheet	1	
	▪ CAWK_G1 Line 28 Worksheet	1	
• Sch P	Alternative Minimum Tax and Credit Limitations	3	
• Sch S	Other State Tax Credit	1	
	▪ CA_ATT40 Overflow Statement	1	

Tax Exempt:

<u>Form</u>	<u>Description</u>	<u>Pages</u>
• 199	Tax Exempt Income Tax Return	2
	▪ CA199ATT CA Form 199 Statement	1
	▪ CAWK_USE Use Tax Worksheet	1
• 3509	Political/Legislative Activities	1
• 3533B	Change of Address for Business, Exempt Organizations, etc	1
• 3586V	Electronic Payment Voucher	1
• 3885	Depreciation and Amortization	1
• 3885F	Depreciation and Amortization	1
	▪ CADEPDIF CA Depreciation Differences	1
	▪ CAGAIN~ CA Gain Attachment	1
	▪ CA_ATT68-69, 72 Overflow Statements	1
• 8453-EO	E-file Authorization for Exempt Organizations	1
• RRF-1	Registration Renewal Fee Report	1