

TaxSlayer Pro Online: Available Carryforward Items

As of 8/22/2023

- **Taxpayer (spouse if MFJ) name, filing status, taxpayer identification number (SSN/ITIN), date of birth, and phone number.**
- **Dependents**
- **Form W-2/W-2PR Employers**
- **Form 1099-R/RRB-1099-R Payers including state and state ID's**
- **New IP PIN Warning if IP PIN Existed in Prior Year**
 - *Presented as an e-file warning if present on prior year but not current year.*
- **Applied Federal Refund from Previous Year**
 - *Applicable Federal value will automatically carry to Payments & Estimates menu > Federal Estimated Payments*
- **Simplified Method Worksheet items**
 - *Included are plan cost at annuity start date, starting date of annuity, and age of recipient at start date.*
- **Form FEC (Foreign Earned Compensation) data**
- **Education Credits**
 - *Includes the educational institution details.*
- **Taxpayer Notes**
 - *Includes the title and details of notes added to a return from the prior year.*
- **Form 1099-Misc Payer data**
- **Unallowed Loss from Schedule E**
- **Schedule B financial institution info for Forms 1099-INT/DIV**
Schedule C
 - *Specifically, business name, business code and description*
- **Schedule D**
 - *Specifically, the carryforward of capital loss and depreciation worksheet*
- **Schedule E**
 - *Specifically rental information and Schedule K-1 payer information*
- **Child Care providers and associated dependents**
- **State and Local Refunds if itemized in the prior year.**
- **Form F5405 Repayment**
 - *Shown as an e-file warning if repayment on prior year but not current year.*
- **Form 1095-A**
 - *Shown as an e-file warning if Form was on prior year but not current year.*