TXF Intelligence

Supported Documents & Field-Mapping Guide

Every document TXF extracts and maps to your tax software — field by field.

✓ captured & mapped to your tax software · — not yet supported · 41 document types

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Supported documents at a glance

DOCUMENT TYPE	DRAKE	PROCONNECT
Prior Year Return	✓	✓
Driver's License	✓	✓
W-2	✓	✓
1098	✓	✓
1099-B	✓	✓
1099-INT	✓	✓
1099-DIV	✓	✓
1099-MISC	✓	✓
1099-NEC	✓	✓
1099-K	✓	✓
1099-OID	✓	✓
1099-R	✓	✓
1099-G	✓	✓
SSA-1099	✓	✓
W2-G	✓	✓
1098-E	✓	✓
1098-T	✓	✓
Donations	✓	✓
Profit and Loss Statement	✓	✓
Schedule C	✓	✓
Schedule E	✓	✓

DOCUMENT TYPE	DRAKE	PROCONNECT
Medical Expenses	✓	✓
Property Taxes	✓	✓
1095-A	✓	✓
1099-C	✓	✓
Balance Sheet	✓	✓
Estimated Taxes	✓	✓
1099-SA	✓	✓
5498: IRA	✓	✓
1099-DA	✓	✓
1099-LTC	✓	
1099-PATR	✓	
1099-Q	✓	
1099-S	✓	
CSA 1099R	✓	
Form 2439	✓	
Passport	✓	
W-2C	✓	
Vehicle Sales Taxes	✓	
Vehicle Registration Fee	✓	
MA 1099-HC	✓	

W-2 · Wage and Tax Statement

Maps to: Form 1040, line 1 (Wages)

TAXPAYER & EMPLOYER INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Employee — name, SSN, address	✓
Employer — name, EIN, address, phone	✓

WAGES, WITHHOLDING & AMOUNTS	SUPPORTED
Wages (Box 1)	✓
Federal income tax withheld (Box 2)	✓
Social Security wages (Box 3)	✓
Social Security tax withheld (Box 4)	✓
Medicare wages (Box 5)	✓
Medicare tax withheld (Box 6)	✓
Social Security tips (Box 7)	✓
Allocated tips (Box 8)	✓
Dependent care benefits (Box 10)	✓
Nonqualified plans (Box 11)	✓
Box 12 coded amounts	✓
Box 13 indicators (statutory employee, retirement plan, third-party sick pay)	✓
Other (Box 14)	✓
State & local (Boxes 15–20)	✓

W2-G · Certain Gambling Winnings

Maps to: Form 1040, line 8b (Gambling winnings)

PAYER & WINNER INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Payer — name, TIN, address, phone	✓
Winner — name, TIN, address	✓

WINNINGS & WITHHOLDING	SUPPORTED
Reportable winnings (Box 1)	✓
Date won (Box 2)	✓
Type of wager (Box 3)	✓
Federal income tax withheld (Box 4)	✓
Transaction & race (Box 5/6)	✓
Winnings from identical wagers (Box 7)	✓
Cashier & window (Box 8/10)	✓
Winner's TIN (Box 9)	✓
First & second ID (Box 11/12)	✓
State & payer state number (Box 13)	✓
State winnings & state income tax withheld (Box 14/15)	✓
Local winnings, local income tax withheld & locality name (Box 16–18)	✓

SSA-1099 · Social Security Benefit Statement

Maps to: Form 1040, line 6a/6b (Social Security income)

RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Recipient — name, TIN, address	✓
Claim number	✓

BENEFIT AMOUNTS	SUPPORTED
Benefits paid	✓
Benefits repaid	✓
Net benefits	✓
Federal income tax withheld	✓

1099-G · Certain Government Payments

Maps to: Form 1040 (agricultural payments route to Schedule F)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓

GOVERNMENT PAYMENT AMOUNTS	SUPPORTED
Unemployment compensation (Box 1)	✓
State/local income tax refunds, credits, or offsets (Box 2)	✓
Tax year for Box 2 (Box 3)	✓
Federal income tax withheld (Box 4)	✓
RTAA payments (Box 5)	✓
Taxable grant (Box 6)	✓
Agricultural payments (Box 7)	✓
Trade-or-business indicator (Box 8)	✓
Market gain (Box 9)	✓
State (Box 10a), state ID (Box 10b) & state income tax withheld (Box 11)	✓

1099-NEC · Nonemployee Compensation

Maps to: Schedule C (Form 1040)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓
Recipient personal/business type	—
Additional recipients	—

INCOME AMOUNTS	SUPPORTED
Nonemployee compensation (Box 1)	✓
Direct sales of \$5,000+ of consumer products (Box 2)	✓
Federal income tax withheld (Box 4)	✓
State, payer state ID, state tax withheld & state income	✓
Local income, local tax withheld & locality name	✓

1099-K · Payment Card and Third Party Network Transactions

Maps to: Form 1040; Schedule C or Schedule D depending on the nature of the proceeds

FILER & PAYEE INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Filer — name, TIN, address, phone	✓
PSE / EPF indicators	✓
PSE name & phone	✓
Payee — name, TIN, address	✓

TRANSACTION AMOUNTS	SUPPORTED
Gross payment card / third-party network transactions (Box 1a)	✓
Card-not-present transactions (Box 1b)	✓
Merchant category code (Box 2)	✓
Number of payment transactions (Box 3)	✓
Federal income tax withheld (Box 4)	✓
Monthly gross amounts (Box 5a–5l, January–December)	✓
State (Box 6), state ID (Box 7) & state income tax withheld (Box 8)	✓

1099-MISC · Miscellaneous Information

Maps to: Schedule E (rents/royalties), Schedule C (business), or Schedule 1, line 8z (other income)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
FATCA filing requirement	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓
Additional recipient	✓

INCOME AMOUNTS	SUPPORTED
Rents	✓
Royalties	✓
Other income	✓
Federal income tax withheld	✓
Fishing boat proceeds	✓
Medical & healthcare payments	✓
Direct sales of \$5,000+ of consumer products	✓
Substitute payments in lieu of dividends or interest	✓
Crop insurance proceeds	✓
Gross proceeds paid to an attorney	✓
Fish purchased for resale	✓
Section 409A deferrals	✓
Nonqualified deferred compensation	✓
State, payer state ID, state tax withheld & state income	✓

1099-B · Proceeds From Broker and Barter Exchange Transactions

Maps to: Form 8949 → Schedule D (capital gains and losses)

BROKER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
FATCA filing requirement	✓
Payer / Broker — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓
Additional recipients	✓

TRANSACTION DETAIL	SUPPORTED
Form 8949 reporting category	✓
Proceeds	✓
Cost or other basis	✓
Accrued market discount	✓
Wash-sale loss disallowed	✓
Gain or loss (short-/long-term)	✓
Proceeds & basis reported to IRS	✓
Noncovered security	✓
Federal income tax withheld	✓
Ordinary; collectibles; QOF	✓
Section 1256 contracts — realized, unrealized & aggregate profit/loss	✓
Bartering	✓
State, payer state ID & state tax withheld	✓

1099-INT · Interest Income

Maps to: Schedule B → Form 1040, line 2a/2b

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
FATCA filing requirement	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓
Additional recipients	✓

INTEREST & AMOUNTS	SUPPORTED
Interest income (Box 1)	✓
Early-withdrawal penalty (Box 2)	✓
Interest on U.S. Savings Bonds & Treasury obligations (Box 3)	✓
Federal income tax withheld (Box 4)	✓
Investment expenses (Box 5)	✓
Foreign tax paid (Box 6)	✓
Foreign country or U.S. territory (Box 7)	✓
Tax-exempt interest (Box 8)	✓
Specified private activity bond interest (Box 9)	✓
Market discount (Box 10)	✓
Bond premium (Box 11)	✓
Bond premium on Treasury obligations (Box 12)	✓
Bond premium on tax-exempt bond (Box 13)	✓
Tax-exempt & tax-credit bond CUSIP number	✓
State, payer state ID & state tax withheld	✓

1099-DIV · Dividends and Distributions

Maps to: Schedule B → Form 1040, line 3a/3b (Dividends)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
FATCA filing requirement	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓
Additional recipients	✓

DIVIDEND AMOUNTS	SUPPORTED
Total ordinary dividends (Box 1a)	✓
Qualified dividends (Box 1b)	✓
Total capital gain distribution (Box 2a)	✓
Unrecaptured Section 1250 gain (Box 2b)	✓
Section 1202 gain (Box 2c)	✓
Collectibles 28% gain (Box 2d)	✓
Section 897 ordinary dividends & capital gain (Box 2e/2f)	✓
Nondividend distributions (Box 3)	✓
Federal income tax withheld (Box 4)	✓
Section 199A dividends (Box 5)	✓
Investment expenses (Box 6)	✓
Foreign tax paid & foreign country (Box 7/8)	✓
Cash & noncash liquidation distributions (Box 9/10)	✓
Exempt-interest dividends (Box 12)	✓
Specified private activity bond interest dividends (Box 13)	✓
State, payer state ID & state tax withheld (Box 14–16)	✓

1099-OID · Original Issue Discount

Maps to: Schedule B (interest income)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
FATCA filing requirement	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓

OID & AMOUNTS	SUPPORTED
Original issue discount for the year (Box 1)	✓
Other periodic interest (Box 2)	✓
Early-withdrawal penalty (Box 3)	✓
Federal income tax withheld (Box 4)	✓
Market discount (Box 5)	✓
Acquisition premium (Box 6)	✓
OID on U.S. Treasury obligations (Box 8)	✓
Investment expense (Box 9)	✓
Bond premium (Box 10)	✓
Tax-exempt OID (Box 11)	✓
State, state ID & state tax withheld	✓

1099-DA · Digital Asset Proceeds From Broker Transactions

Maps to: Form 8949 → Schedule D (capital gains and losses)

FILER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
CUSIP number	✓
Payer / Filer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓
Additional recipients	✓

TRANSACTION DETAIL	SUPPORTED
Applicable Form 8949 checkbox	✓
Code for digital asset	✓
Name of digital asset	✓
Number of units	✓
Date acquired	✓
Date sold	✓
Proceeds & basis reported to IRS	✓
Accrued market discount	✓
Wash sale loss disallowed	✓
Federal income tax withheld	✓
Gain/loss type	✓
Digital asset type	✓
Number of transactions	✓
Proceeds from primary sale	✓
Number of units transferred in	✓
Transfer in date	✓
State, payer state ID & state tax withheld	✓

1099-PATR · Taxable Distributions Received From Cooperatives

Maps to: Form 1040; Schedule B or Schedule E

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓

DISTRIBUTION AMOUNTS	SUPPORTED
Patronage dividends (Box 1)	✓
Nonpatronage distributions (Box 2)	✓
Per-unit retain allocations (Box 3)	✓
Federal income tax withheld (Box 4)	✓
Redeemed nonqualified notices (Box 5)	✓
Section 199A(g) deduction (Box 6)	✓
Qualified payments — Section 199A(b)(7) (Box 7)	✓
Section 199A(a) qualified & SSTB items (Box 8/9)	✓
Investment credit (Box 10)	✓
Work opportunity credit (Box 11)	✓
Other credits and deductions (Box 12)	✓
Specified cooperative checkbox (Box 13)	✓

Form 2439 · Notice to Shareholder of Undistributed Long-Term Capital Gains

Maps to: Schedule D → Form 1040

PAYER & SHAREHOLDER INFORMATION	SUPPORTED
Tax year	✓
Corrected / void indicators	✓
Beginning & ending dates	✓
Payer — name, TIN, address, phone	✓
Shareholder — name, TIN, address	✓

CAPITAL GAIN AMOUNTS	SUPPORTED
Undistributed long-term capital gains (Box 1a)	✓
Unrecaptured Section 1250 gain (Box 1b)	✓
Section 1202 gain (Box 1c)	✓
Collectibles 28% gain (Box 1d)	✓
Tax paid by RIC or REIT on Box 1a gains (Box 2)	✓

1099-S · Proceeds From Real Estate Transactions

Maps to: Form 8949 → Schedule D (sale or exchange of real estate)

Currently supported for Drake; ProConnect support is not yet available.

FILER & TRANSFEROR INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Filer — name, TIN, address, phone	✓
Transferor — name, TIN, address	✓
Additional transferor	—

TRANSACTION AMOUNTS	SUPPORTED
Date of closing (Box 1)	✓
Gross proceeds (Box 2)	✓
Address or legal description (Box 3)	✓
Transferor received property or services (Box 4)	✓
Transferor is a foreign person (Box 5)	✓
Buyer's part of real estate tax (Box 6)	✓

1099-R · Distributions From Pensions, Annuities, Retirement Plans, IRAs, etc.

Maps to: Form 1040, line 4a/4b (Retirement income)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
FATCA filing requirement	✓
Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓

DISTRIBUTION AMOUNTS	SUPPORTED
Gross distribution	✓
Taxable amount & taxable-amount-not-determined	✓
Total distribution	✓
Capital gain	✓
Federal income tax withheld	✓
Employee contributions / Roth contributions / insurance premiums	✓
Net unrealized appreciation	✓
IRA / SEP / SIMPLE indicator	✓
Distribution code	✓
Your percentage of total distribution	✓
Total employee contributions	✓
Amount allocable to IRR within 5 years	✓
First year of Roth contribution	✓
Date of payment	✓
State tax withheld, state, employer state ID & state distribution	✓
Local tax withheld, locality name & local distribution	✓

CSA 1099R · Civil Service Annuity (OPM Form 1099-R)

Maps to: Form 1040, line 4a/4b (Retirement income)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Payer — name, address, federal ID	✓
Taxpayer name	✓
Recipient ID number	✓

DISTRIBUTION AMOUNTS	SUPPORTED
Gross distribution (Box 1)	✓
Taxable amount (Box 2a)	✓
Federal income tax withheld (Box 4)	✓
Employee contributions (Box 5)	✓
Distribution code (Box 7)	✓
Total employee contributions (Box 9b)	✓
State tax withheld & state/payer state no. (Box 12/13)	✓

5498: IRA · IRA Contribution Information

Maps to: Form 8606 (IRA contributions) → Form 1040

TRUSTEE & PARTICIPANT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Trustee / Issuer — name, TIN, address, phone	✓
Participant — name, TIN, address	✓

CONTRIBUTION AMOUNTS	SUPPORTED
IRA contributions (Box 1)	✓
Rollover contributions (Box 2)	✓
Roth IRA conversion amount (Box 3)	✓
Recharacterized contributions (Box 4)	✓
Fair market value of account (Box 5)	✓
Life insurance cost included in Box 1 (Box 6)	✓
Account type — IRA / SEP / SIMPLE / Roth (Box 7)	✓
SEP contributions (Box 8)	✓
SIMPLE contributions (Box 9)	✓
Roth IRA contributions (Box 10)	✓
RMD-for-year checkbox, date & amount (Box 11/12a/12b)	✓
Postponed contribution — amount, year, code (Box 13a–c)	✓
Repayments — amount & code (Box 14a/14b)	✓
FMV of certain specified assets — amount & code (Box 15a/15b)	✓

1099-SA · Distributions From an HSA, Archer MSA, or Medicare Advantage MSA

Maps to: Form 8889 (HSA) or Form 8853 (Archer / MA MSA) → Schedule 1, line 8e/8f

TRUSTEE & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Trustee / Payer — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓

DISTRIBUTION AMOUNTS	SUPPORTED
Gross distribution (Box 1)	✓
Earnings on excess contributions (Box 2)	✓
Distribution code (Box 3)	✓
FMV on date of death (Box 4)	✓
Account type — HSA / Archer MSA / MA MSA (Box 5)	✓

1099-Q · Payments From Qualified Education Programs

Maps to: Form 1040 (coordinates with Form 1098-T / education benefits)

PAYER & RECIPIENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Payer / Trustee — name, TIN, address, phone	✓
Recipient — name, TIN, address	✓

DISTRIBUTION AMOUNTS	SUPPORTED
Gross distribution (Box 1)	✓
Earnings (Box 2)	✓
Basis (Box 3)	✓
Trustee-to-trustee / QTP-to-Roth-IRA transfer (Box 4)	✓
Distribution source — private QTP / state QTP / Coverdell ESA (Box 5)	✓
Recipient is not the designated beneficiary (Box 6)	✓

1099-LTC · Long-Term Care and Accelerated Death Benefits

Maps to: Form 8853 (also Schedule A where deductible)

PAYER, POLICYHOLDER & INSURED INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Payer — name, TIN, address, phone	✓
Policyholder — name, TIN, address	✓
Insured — name, TIN, address	✓

BENEFIT AMOUNTS	SUPPORTED
Gross long-term care benefits paid (Box 1)	✓
Accelerated death benefits paid (Box 2)	✓
Per diem / reimbursement amount (Box 3)	✓
Qualified contract (Box 4)	✓
Chronically / terminally ill indicator (Box 5)	✓
Date certified	✓

Schedule C · Profit or Loss From Business

Maps to: Schedule C (Form 1040)

PROPRIETOR & BUSINESS INFORMATION	SUPPORTED
Tax year	✓
Proprietor — name, TIN	✓
Additional proprietor	✓
Principal business or profession	✓
Business code	✓
Business name & EIN	✓
Business address	✓
Accounting method (cash, accrual, or other)	✓

INCOME, EXPENSES & RESULT	SUPPORTED
Gross receipts or sales	✓
Returns and allowances	✓
Cost of goods sold	✓
Other income	✓
All standard Part II expense lines (advertising, vehicle, depreciation & §179, wages, rent, supplies, etc.)	✓
Itemized "other expenses" list	✓
Business-use-of-home expenses	✓
Total & business square footage	✓
Vehicle placed-in-service date	✓
Inventory method & ending inventory	✓
Net profit or loss	✓

Schedule E · Supplemental Income and Loss

Maps to: Schedule E (Form 1040)

OWNER & PROPERTY INFORMATION	SUPPORTED
Tax year	✓
Taxpayer — name, TIN (personal or business)	✓
Additional taxpayers	✓
Property address	✓
Property type	✓
Fair rental days & personal use days	✓
Qualified joint venture (QJV)	✓

INCOME, EXPENSES & RESULT	SUPPORTED
Rents received	✓
Royalties received	✓
Expenses — advertising; auto & travel; cleaning & maintenance; commissions; insurance; legal & professional; management fees; mortgage interest; other interest; repairs; supplies; taxes; utilities	✓
Depreciation / depletion	✓
Total expenses	✓
Deductible loss after limitation	✓
Itemized "other expenses" list	✓

Profit and Loss Statement

Maps to: Schedule C or Schedule E (based on activity type)

GENERAL	SUPPORTED
Tax year	✓
Business / activity identity (name, address, TIN)	✓

FINANCIALS & EXPENSES	SUPPORTED
Total revenue	✓
Cost of sales	✓
Gross profit	✓
Operating expenses	✓
Total expenses	✓
Net income	✓
Categorized expenses (advertising, car & truck, depreciation, insurance, interest, legal & professional, management fees, repairs, supplies, taxes, travel, utilities, etc.)	✓
Business expenses (contract labor, employee benefits, meals, office, pension & profit-sharing, rent, §179, wages, etc.)	✓
Itemized "other expenses" (name & amount)	✓

Balance Sheet

Maps to: Schedule C

BUSINESS & BALANCES	SUPPORTED
Business — name, TIN, address	✓
Tax year	—
Assets	✓
Liabilities	✓
Equity	✓

Estimated Taxes

Maps to: Form 1040-ES (estimated tax payments)

ESTIMATED TAX PAYMENTS	SUPPORTED
Payment date	✓
Federal amount	✓
State	✓
State amount	✓

Deductions & credits

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1098 · Mortgage Interest Statement

Maps to: Schedule A (also Schedule C or Schedule E for business / rental use)

LENDER & BORROWER INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Recipient / Lender — name, TIN, address, phone	✓
Payer / Borrower — name, TIN, address	✓
Additional payer	✓

MORTGAGE AMOUNTS	SUPPORTED
Mortgage interest received	✓
Outstanding mortgage principal	✓
Mortgage origination date	✓
Refund of overpaid interest	✓
Mortgage insurance premiums	✓
Points paid on purchase	✓
Property securing the mortgage — address, description, number of properties, acquisition date	✓
Real estate taxes	✓

1098-E · Student Loan Interest Statement

Maps to: Schedule 1, line 21 (Student loan interest deduction)

LENDER & BORROWER INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Lender — name, TIN, address, phone	✓
Borrower — name, TIN, address	✓

INTEREST AMOUNTS	SUPPORTED
Student loan interest received by lender (Box 1)	✓
Box 1 excludes loan origination fees / capitalized interest indicator (Box 2)	✓

1098-T · Tuition Statement

Maps to: Form 8863 (Education credits)

FILER & STUDENT INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Service provider / account	✓
Filer — name, TIN, address, phone	✓
Student — name, TIN, address	✓

TUITION AMOUNTS & INDICATORS	SUPPORTED
Payments received for qualified tuition (Box 1)	✓
Adjustments made for a prior year (Box 4)	✓
Scholarships or grants (Box 5)	✓
Adjustments to scholarships or grants for a prior year (Box 6)	✓
Payments for Jan–Mar of following year (Box 7)	✓
At least half-time student (Box 8)	✓
Graduate student (Box 9)	✓

Donations

Maps to: Schedule A (charitable contributions)

DONATION DETAILS	SUPPORTED
Donee / beneficiary	✓
Date	✓
Donation type — cash or noncash	✓
Total amount	✓

Medical Expenses

Maps to: Schedule A (medical & dental expenses)

EXPENSE DETAILS	SUPPORTED
Provider	✓
Date	✓
Expense type & amount (repeating list)	✓

Property Taxes

Maps to: Schedule A, line 5b (state & local real estate taxes)

TAXPAYER & PROPERTY INFORMATION	SUPPORTED
Tax year	✓
Taxpayer — name, TIN	✓
Additional taxpayer	✓
Taxpayer address	✓
Property address	✓
Payer type selector (personal / business / trust)	—
Business / trust payer variants	—

AMOUNTS	SUPPORTED
Property taxes — total tax due / amount paid	✓
School taxes — total tax due	✓

Vehicle Sales Taxes

Maps to: Schedule A (general sales tax deduction)

CAPTURED FIELDS	SUPPORTED
Vehicle purchase price	✓
Sales tax paid	✓
Title / license fees	✓

Vehicle Registration Fee

Maps to: Schedule A (value-based portion)

CAPTURED FIELDS	SUPPORTED
Registration fee amount	✓

1095-A · Health Insurance Marketplace Statement

Maps to: Form 8962 (Premium Tax Credit) → Form 1040

POLICY & COVERED INDIVIDUALS	SUPPORTED
Tax year	✓
Corrected indicator	✓
Marketplace identifier & assigned policy number	✓
Policy issuer's name	✓
Policy start & termination dates	✓
Recipient — name, TIN, date of birth	✓
Spouse — name, TIN, date of birth	✓
Recipient address	✓
Covered individuals — name, TIN, DOB, coverage start/termination	✓

MONTHLY PREMIUM AMOUNTS (PART III)	SUPPORTED
Monthly enrollment premiums (Column A)	✓
Monthly Second Lowest Cost Silver Plan premium (Column B)	✓
Monthly Advance Payment of Premium Tax Credit (Column C)	✓

1099-C · Cancellation of Debt

Maps to: Form 1040, line 8c (other income) / Form 982

CREDITOR & DEBTOR INFORMATION	SUPPORTED
Tax year	✓
Corrected indicator	✓
Account number	✓
Creditor — name, TIN, address, phone	✓
Debtor — name, TIN, address	✓

CANCELLATION AMOUNTS	SUPPORTED
Date of identifiable event (Box 1)	✓
Amount of debt discharged (Box 2)	✓
Interest, if included in Box 2 (Box 3)	✓
Debt description (Box 4)	✓
Debtor was personally liable (Box 5)	✓
Identifiable event code (Box 6)	✓
Fair market value of property (Box 7)	✓

Prior Year Return

Maps to: Form 1040 — prior-year reference used to pre-fill the new return and capture prior-year comparisons for rollover

TAXPAYER & RETURN INFORMATION	SUPPORTED
Tax year	✓
Filing status	✓
Taxpayer — name, SSN	✓
Spouse — name, SSN	✓
Address	✓
Dependents — name, TIN, relationship	✓
Taxpayer & spouse occupation	✓
Phone	—
Email	—

PRIOR-YEAR AMOUNTS	SUPPORTED
Total tax (line 24)	✓
Federal income tax withheld (line 25d)	✓
Overpayment (line 34)	✓
Estimated tax (line 36)	✓
Amount owed (line 37)	✓
Total income (line 9)	—
Adjusted gross income (line 11)	—
Deductions (line 12)	—
Taxable income (line 15)	—
Qualifies for child credit	—

Driver's License

Maps to: Identity verification for e-file (Form 1040)

IDENTITY FIELDS	SUPPORTED
Name — first, middle, last	✓
Date of birth	✓
Issuing state	✓
License number	✓
Document discriminator	✓
Issue date & expiration date	✓
Address	✓
Side: Front/back	✓

Passport

Maps to: Identity verification for e-file (used for non-residents)

IDENTITY FIELDS	SUPPORTED
Passport number	✓
Name — first, middle, last	✓
Country	✓
Date of birth	✓
Issue date & expiration date	✓

W-2C · Corrected Wage and Tax Statement

Maps to: Form 1040, line 1 (Wages)

Captures the same fields as the W-2 (reflecting corrected amounts); Drake requires marking the "Corrected W-2" box.

MA 1099-HC · Massachusetts Health Coverage

Maps to: Massachusetts Schedule HC

CARRIER & SUBSCRIBER INFORMATION	SUPPORTED
Insurance company — name, TIN	✓
Subscriber — name, date of birth, subscriber number, address	✓
Dependents — name, date of birth, subscriber number	✓
Tax year	—

COVERAGE	SUPPORTED
Subscriber minimum creditable coverage — full year & per-month (Jan–Dec)	✓
Dependent coverage — full year & per-month (Jan–Dec)	✓