pennsylvania DEPARTMENT OF REVENUE (SU) 09-24

REV-1896

OFFICIAL USE ONLY

START

1099 INCOME WORKSHEET 20___

Name (if filing jointly, use name shown first on the PA-40)	Social Security Number

Use this schedule to list all income received from 1099 forms, from all sources.

List each source of income received during the taxable year on a form 1099-R, 1099-MISC, 1099-NEC, or other statements, other than a federal Form W-2. Enter each payer's FEIN. Indicate the line of the PA-40 that the income is reported in column (B). If you are reporting income from a 1099-R, enter the distribution code from the 1099-R in column (D). Enter the amount of federal income that you earned in column (E). If the form or statement does not have separately stated amounts, enter the federal amount in both columns (E) and (G). If separately stated on the form, enter the amount of PA income in column (G). Enter any PA Tax Withheld in column (H). DO NOT enter federal income tax withheld or tax withheld for any other state.

IMPORTANT: If you file your PA-40 return in paper format, you must include actual copies of all forms 1099-R for all types of distributions regardless of whether the distribution is taxable and/or non-taxable for PA personal income tax purposes. If the amounts on forms 1099-MISC and/or 1099-NEC are reported as compensation or included PA tax withheld, you are required to submit actual copies of the forms.

If you filed your PA-40 return electronically, you are only required to submit copies of the Forms 1099-R, 1099-MISC, and 1099-NEC if PA tax withholding was reported on the forms.

NOTE: If you are claiming 'adjusted plan basis' (previously taxed amounts) in column (F), for some or all of an early distribution, the department may request proof of your basis, such as:

- Year by year schedule showing the cost recovery method. For each year, indicate the amounts of:
  - Employee contributions,
  - Employer contributions, and
  - Withdrawals previously made.
- Copy of each PA-40 tax return for each year a contribution was made to the account, including any PA Schedule W-2S filed with the return.
- W-2(s) for each year to verify the correct amounts of taxable deferrals/contributions.

If you need more space, you may photocopy this schedule or make your own schedules in this format.

Miscellaneous and Non-employee Compensation from federal Forms 1099-R, 1099-MISC, 1099-NEC, and other statements
YOU MUST SUBMIT COPIES OF EACH FORM OR STATEMENT LISTED

A. T/S	B. LINE	C. PAYER FEIN	D. 1099R CODE	E. TOTAL FEDERAL AMOUNT	F. ADJUSTED PLAN BASIS	G. TOTAL PA AMOUNT	H. PA TAX WITHHELD

LINE INCOME REPORTED ON:

1a. Gross Compensation
2. Interest Income - Schedule A
3. Dividend Income - Schedule B
4. Business Income - Schedule C
5. Sale of Property - Schedule D
6. Rents & Royalties - Schedule E
8. Gambling - Schedule T

Reset Entire Form TOP OF PAGE PRINT