

Acceptable Forms and Occurrences for CA Individual e-file

The following chart lists the acceptable Individual forms and schedules that may be e-filed with FTB and the maximum number of each type of form or schedule allowed per return.

Form/ Schedules	Max. # per return	Title
Form 540	1	California Resident Income Tax Return
Form 540 2EZ	1	California Resident Income Tax Return
Long Form 540NR	1	California Nonresident or Part-Year Resident Income Tax Return (Long Form)
Short Form 540NR	1	California Nonresident or Part-Year Resident Income Tax Return (Short Form)
Form 592-B	Unbounded	Resident and Nonresident Withholding Tax Statement
Form 593	Unbounded	Real Estate Withholding Tax Statement
Form 3503	Unbounded	Natural Heritage Preservation Credit
Form 3506	1	Child and Dependent Care Expenses Credit
Form 3507	1	Prison Inmate Labor Credit
Form 3510	1	Credit for Prior Year Alternative Minimum Tax – Individuals or Fiduciaries
Form 3511	1	Environmental Tax Credit
Form 3514	1	California Earned Income Tax Credit
Form 3521	1	Low-Income Housing Credit
Form 3523	1	Research Credit
Form 3526	1	Investment Interest Expense Deduction
Form 3531	Unbounded	California Competes Tax Credit
Form 3532	1	Head of Household Filing Status Schedule
Form 3540	1	Credit Carryover and Recapture Summary
Form 3541	Unbounded	California Motion Picture and Television Production Credit
Form 3546	1	Enhanced Oil Recovery Credit
Form 3547	1	Donated Agricultural Products Transportation Credit
Form 3548	Unbounded	Disabled Access Credit for Eligible Small Businesses
Form 3554	Unbounded	New Employment Credit
Form 3592	Unbounded	College Access Tax Credit
Form 3596	1	Paid Preparer's California Earned Income Tax Credit Checklist
Form 3800	1	Tax Computation for Certain Children with Unearned Income
Form 3801	1	Passive Activity Loss Limitations
Form 3801-CR	1	Passive Activity Credit Limitations
Form 3803	10	Parents' Election to Report Child's Interest and Dividends
Form 3805E	25	Installment Sale Income

Form/ Schedules	Max. # per return	Title
Form 3805P	1 per t/p	Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts
Form 3805V	1	Net Operating Loss (NOL) Computations and NOL and Disaster Loss Limitations – Individuals, Estates, and Trusts
Form 3805Z	Unbounded	Enterprise Zone Deduction and Credit Summary
Form 3806	Unbounded	Los Angeles Revitalization Zone Net Operating Loss (NOL) and Carryover Deduction
Form 3807	Unbounded	Local Agency Military Base Recovery Area Deduction and Credit Summary (LAMBRA)
Form 3808	Unbounded	Manufacturing Enhancement Area Credit Summary (MEA)
Form 3809	Unbounded	Targeted Tax Area Deduction and Credit Summary (TTA)
Form 3811	1	Donated Fresh Fruits or Vegetables Credit
Form 3840	Unbounded	California Like-Kind Exchanges
Form 3885A	Unbounded	Depreciation and Amortization Adjustments
Form 5805	1	Underpayment of Estimated Tax by Individuals and Fiduciaries
Form 5805F	1	Underpayment of Estimated Tax by Farmers and Fishermen
Form 5870A	1 per t/p	Tax on Accumulation Distribution of Trusts
Form W-2	50	Wage and Tax Statement
Schedule CA (540)	1	California Adjustments – Residents
Schedule CA (540NR)	1	California Adjustments – Nonresidents or Part-Year Residents
Schedule D (540)	1	California Capital Gain or Loss Adjustment
Schedule D (540NR)	1	California Capital Gain or Loss Adjustment for Nonresidents or Part-Year Residents
Schedule D-1	1	Sales of Business Property
Schedule G-1	1 per t/p	Tax on Lump-Sum Distributions
Schedule P (540)	1	Alternative Minimum Tax and Credit Limitations – Residents
Schedule P (540NR)	1	Alternative Minimum Tax and Credit Limitations – Nonresidents or Part-Year Residents
Schedule R	1 per t/p	Apportionment and Allocation of Income
Schedule S	25	Other State Tax Credit
Schedule RDP	1	CA RDP Adjustments Worksheet
Form IRS 1099-R	20	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRA's, Insurance Contracts, etc.
Form IRS 4684	Unbounded	Casualties and Thefts
Form IRS 8824	Unbounded	Like-Kind Exchanges
Form IRS 8886	Unbounded	Reportable Transaction Disclosure Statement
Form IRS W-2G	Unbounded	Certain Gambling Winnings