How do I remove or update tax form line item assignments?

For an overall view of your tax-related categories and any tax forms assigned to these categories, choose Tools menu > Category List. The Category List shows the tax line item assigned to a category.

Update the tax line item assignment for a category

To update the tax line item for a category, edit the category so that it uses the new tax line item.

Update the tax line item assignment for a single transaction

1. Open the account that contains the transaction you need to edit.
2. In the account register, select the transaction you want to change.
3. Choose **Edit** menu > **Tax Line Item Assignments**.
4. What do you want to do?
    - **Add or change a tax line item**
      In the Tax item list, select the tax form and tax schedule line item you want to use, and then click **OK**.
        - **What if I don't see the tax line item I want?**
          If you don't find your tax line item, or if you know the category is related to an uncommon tax form (for example, Form 8839: Qualified Adoption Expenses), click Extended List and look again.
        - **Which tax schedules and forms does Quicken recognize?**
          Quicken recognizes a number of tax schedules and forms.
    - **Remove a tax line item**
      In the Tax item list, select the blank row at the top of the list, and then click OK.
      Although the category still shows the default tax line item in the register, Quicken no longer counts this transaction with the tax-related transactions. Quicken also removes the white check mark in a red circle (below the date) that indicates the transaction has a tax impact.
    - **Restore a tax line item**
      In the Tax item list, select Restore tax line item, and then click OK.
      Quicken counts this transaction with the tax-related transactions and restores the white check mark in a red circle (below the date) that indicates the transaction has a tax impact.
5. Click **Save** to record the changes.

There are two ways you can change the tax line item associated with a category:

- You can edit the category in the Category List so that it uses a different tax line item. When you change the tax line item at the Category List level, Quicken applies the new tax line item in both past and future transactions that use the category.
- You can edit the category in an individual transaction so that it uses a different tax line item. This option can help you track business expenses for categories that you use for both personal and business expenses (for example, a restaurant that you go to with friends on Saturday and clients during the week).

  When you change the tax line item at the transaction level, Quicken changes the tax line item for only the edited transaction and continues to use the original tax line item in all other transactions that use the category.

- Restore a tax line item
  In theTax itemlist, selectRestore tax line item, and then clickOK.
    - What happens next? Quicken counts this transaction with the tax-related transactions and restores the white check mark in a red circle (below the date) that indicates the transaction has a tax impact.

- Click Save to record the changes.