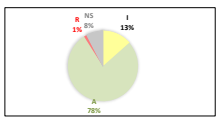
VENDOR SUBSTITUTE FORM MATRIX TY2024

VENDOR NAME	HRB DEVLOPMENT, LLC (HRBS)	CCH INCORPORATED	CS PROFESSIONAL SUITE	CORPTAX, INC.	DRAKE SOFTWARE, LLC	INTUIT INC. (BUSINESS)	JACKSON HEWITT	INTUIT INC.	CROSSLINK PROFESSIONAL TAX SOLUTIONS, LLC	TAXSLAYER, LLC	BLOOMBERG INDUSTRY GROUP	UNIVERSAL TAX SYSTEMS, INC.	THOMSON REUTERS, INC.	SUB CATEGORY FOR THOMSON REUTERS, INC.	SUB CATEGORY FOR THOMSON REUTERS, INC.	SUB CATEGORY FOR THOMSON REUTERS, INC.	SUB CATEGORY FOR THOMSON REUTERS, INC.	SUB CATEGORY FOR THOMSON REUTERS, INC.	SUB CATEGORY FOR THOMSON REUTERS, INC.	TAXACT, INC.	FILEYOURTAXES.COM	VERTEX	EZTAXRETURN.COM	ON-LINE TAXES, INC.	TAX TECHNOLOGIES, INC.	INTUIT INC. (INDIVIDUAL)	LIBERTY TAX Esmart	ONESOURCE VIRTUAL HR, INC.	K1X, INC. (new for TY2024)	PWC U.S TAX LLP	BGS SOFTPRO	HRB DEVLOPMENT, LLC (TVO)	HRB DEVLOPMENT, LLC (B WO)	INSTEAD, LLC (new for TY2024)	APRIL FILING	UNIVERSAL TAX SYSTEMS, INC. (ATX)	ADVANCED TAX SOLUTION, LLC	TAXA AI INC. (new for TY2024)	HRB DEVLOPMENT, LLC (BW)	BNA	LIBERTY TAX (PHOENIX)	SOLVED
VENDOR ID #	1017	1019	1022	1023	1024	1030	1031	1032	1037	1038	1039	1045	1062	162B	162D	162G	162Q	162T	1064	1115	1120	1181	1211	1259	1555	1562	1624	1686	1687	1691	1729	1735	1768	1782	1833	1937	1978	2029	2039	2273	2280
LOI SUBMITTED?	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	-	-	-	-	-	YES			YES	YES	YES	YES		YES	YES	YES		YES	YES	YES		YES	YES	YES	YES			
FORM																																										
ADDL INFO		A	A	A	A	A	A	A	A	A	A	A	A	A	A		A		A					A	A				A				I		A	A	I	A			
AFFL SCHD		A	A	A							A		A		A									A	A				A				I			A	I				
BET		A	A	A	A	A	A	A	A	A	A	A	A	A	A		A		A					A	A			R	A			A	I		A	I	A			
BET CRDT WRKST		A	A	A	A	A	A	A	A	A	A	A	A	A	A		A		A					A	A				A			A	I		A	I	I	A			
BET-80		A	A	A	A	A		A	A	A	A	A	A	A	A		A		A					A	A			R	A				I		A	A	I	A			
BET-80-WE		A	A	A							A		A		A										A				A								I				
BT-EXT TCA		A	A	A	A	A	NS	A	A	A	A	A	A	NS	A		A		A					A	A	A			A	I			NS	I		A	A	I	A			
BT-EXT TCB		A	A	NS	A	NS	A	A	A	A	A	A	A	A	A		A		A					A	A	A			A	I			A	I		A	A	I	NS			
BT-EXT TCC		NS	A	A	I	A	NS	A	A	NS	A	A	A	NS	A		A		A					A	A	A			A	I			NS	I		A	A	I	NS			
BT-SUMMARY TCA		A	A	A	A	A	NS	A	A	A	A	A	A	NS	A		A		A					A	A	A			R	R			A	I		A	A	I	A			
BT-SUMMARY TCB		A	A	NS	A	NS	A	A	A	A	A	A	A	A	A		A		A					A	A	A			R	R			A	I		A	A	I	NS			
CD-3													A																													
CD-57-P																																											
CD-57-S																																											
CD-57-HC-P																																											
CD-57-HC-S																																											
DP-9		A	A	A	A	A		A	A	A	A	A	A		A								A									I		A		I	A			
DP-10 TCA	NS	A	A		A	A	NS	A	NS	NS	A	A	A	NS			NS	NS	NS			I	A	A	NS						I	NS	I		A	A	I	A			
DP-10 TCB	A	A	A		A	NS	A	A	A	A	A	A	A	A			NS	NS	A			I	A	A	A						A	A	I		A	A	I	NS			
DP-10 ESTATE																	A	A																							
DP-14											I		A																				I		A		I				
DP-31																																					I				
DP-59-A TCA	A	A	A	NS	A	NS	A	A	A	A	A	A	A	A		NS			A					A	A	A							A	I		A	A	I	NS			
DP-59-A TCB	NS	A	A	A	A	A	NS	A	NS	NS	A	A	A	NS		NS			NS					A	A	A							NS	I		A	A	I	A			
DP-59-A ESTATE																A																									
DP-80		A	A	A	A	A	A	A	A	A	A	A	A	A	A		A		A					A	A	A				A				I		A	A	I	A			
DP-110-ES																																						I				
DP-111-ES																																						I				
DP-120		A	A	A	A	A		A	A	A	A	A	A		A				A					A									I		A	A	I	A			
DP-120-P		A	A	A							A		A												A									A			I				
DP-121 TCA		A	A								I		A																							A	I				
DP-121 TCB		A	A								A		A																							A	I				
DP-131-A		A	A	A	A				A		A		A		A									A	A				R				I		A	A	I	A			
DP-132		A	A	A	A	A		A	A		A	A	A		A		A		A					A	A				A			A	I		A	A	I	A			
DP-132-WE		A	A	A							A		A		A										A				A				I				I				
DP-135													A																								I				
DP-135-ES													A																								I				
DP-139													A																								I				
DP-143													A																								I				
DP-144													A																								I				
DP-151													A																								I				
DP-153																																					I				
DP-156																																					I				
DP-160		A	A	A	A	A		A	A	A	A	A	A		A		A		A					A	A					A				I		A	A	I	A			
DP-165			A										A												A												A				
DP-175 TCA		A											A																												
DP-175 TCB		NS											A																												
DP-200 TCA			A		A								A																												
DP-200 TCB			A		A								A																												
DP-255-ES																																					I				
DP-2848		A	I		I			A					I														I							I		A	I	I				
DP-2210/2220 TCA		A	A	A	A	A	A	A	A	A	A	A	A	A	A	NS	A		A					A	A	A				A				I		A	A	I	A			
DP-2210/2220 TCB		A	A	A	A	A	A	A	A	NS	A	A	A	A	A	A	A		A					A	A	A				A				I		A	A	I	A			
NH-1040		A	A		A		A	A		A	A	A	A	A					A					A		A								I		A	A	I				
NH-1040-ES TCA		A	A		R		A	A		A	A	A	A	A					A					A		A								I		A	A	I				
NH-1040-ES TCB		A	A		R		NS	A		A	A	A	A	A					A					A		A							NS	I		A	A	I				
NH-1041		A	A		A			A	A	A	A	A	A											A										I		A	A	I	A			
NH-1041-ES		A	A		R			A	A	A	A	A	A											A										I		A	A	I	A			
NH-1065		A	A	A	A	A		A	A	A	A	A	A				A		A					A	A					I				I		A	A	I	A			
NH-1065-ES		A	A	A	A	A		A	A	A	A	A	A				A		A					A	A									I		A	A	I	A			
NH-1120		A	A	A	A	A		A	A	A	A	A	A		A				A					A	A					A				I		A	A	I	A			
NH-1120-ES		A	A	A	A	A		A	A	A	A	A	A		A				A					A	A			R						I		A	A	I	A			
NH-1120-WE		A	A	A							A		A		A		A								A				R					I							
NH-1310		A	A										A																							A						
NH-PYT TCA	NS	A	A	A	A		NS	A	I	A	I		A	NS	A	NS	A		NS			NS	A	A	A				I		NS	NS	I		A	A	I	A			
NH-PYT TCB	A	A	A	NS	A		A	A	I	A	I		A	A	A	NS	A		A			A	A	A	A				I		A	A	I		A	A	I	A			
NH-PYT TCC	NS	NS	NS	I	I		NS	NS	I	NS	I		A	NS	A	NS	A		NS			NS	I	A	A				I		NS	NS	I		A	A	I	A			
NH-PYT ESTATE																A																									
PA-34																																						I				
SCHD II		A	A	A							A		A		A									A					A								I				
SCHD III		A	A	A							R		A		A									A					A								I				
SCHD IV		A	A	A	A	A	NS	A	A	A	A	A	A	A	A		A		A					A	A	A				A			A	I		A	A	I	A			

LEGEND

I	**Intent**: Letter of Intent was filed
A	**Approved:** Form has been tested and has been formally approved.
R	**Rejected**: Form has been rejected and requires resubmission.
NS	**Not Supported**: The vendor does not support the test case.

RESULTS	AMOUNT
I	125
A	721
R	13
NS	71



= Vendor fully tested according to submitted LOI.