

ERO-10 Training Template Specs

Settings

Custom Fields

Field	Req?	Question	Values
1 – 10	No	<none>	
11	No	Other than English what language is spoken in the home	
12	No	Are you or a member of your household considered disabled	NOT SPECIFIED NO YES
13	Yes	Preparer Initials	
14	Yes	Quality Reviewer Initials	

Return Stages

Not used for training

Print Sets

Checked?	Option	Comments
No	Primary Forms	
Yes	Completed Forms	
No	Signature Forms	
None	My Print Set	
None	My State Print Set	

Advanced

Checked?	Option	Comments
No	Use Mode to Display Tax Returns	
No	All Mef Efile Creation	
	The override feature enabled for roles:	
No	Interviewer	
No	ReturnPreparer	
No	Reviewer	

Send Settings

Not used

ERO-10 Training Template Specs

Salutations

Field	Req?	Values	Comments
Taxpayer Salutations	No	Mr Mrs Dr Ms Miss	Defaults
Spouse Salutations	No	Mr Mrs Dr Ms Miss	Defaults

ERO-10 Training Template Specs

Template

For the following to work properly, you must create a new template based on:
 “new return template (default set of forms)”

- DO NOT base your new template on any existing template

Use Ctrl-L to lock field (only available from ADMIN username)

Federal

Main Info (in tree)

Telephone numbers / Taxpayer / Daytime	Make Red		
Are you excluding Puerto Rico income from this tax return?	Select No		Lock
State Information / If you are not preparing a state return, check here	UnCheck box		
State Information / Full year resident	Enter “NJ”		
Type of Return	Select E-file ONLY		
Self-Select and Practitioner PIN(s) / ERO PIN	Enter “98765”		Lock
Self-Select and Practitioner PIN(s) / Check if using the Practitioner PIN method for e-filing this income tax return or Form 4868 with direct debit	Check box		Lock
Self-Select and Practitioner PIN(s) / What form(s) are you e-filing using PINs?	Select The income tax return		Lock
Self-Select and Practitioner PIN(s) / Taxpayer’s PIN	Select I authorize		Lock
Self-Select and Practitioner PIN(s) / Spouse’s PIN	Select I authorize		Lock
Third Party Designee / Do you want to allow another person to discuss this return with the IRS?	Select No		Lock
Preparer Information / IRS Only	Check box		Lock
Preparer Information / PTIN	Enter “24000000”		Lock
Preparer Information / Preparer’s name	Make Un-Red		Lock

Prep Use (Add to tree)

Check here if using this form	Check box	Will cause form to be included in printout and red in tree if required stuff missing
Question and Answer fields should not be filled in here – they will populate in created returns based on values from the Settings / Custom Fields screen		

Summary (Already in tree)

Check here if using this form	Check box	Will cause form to be included in printout
-------------------------------	-----------	--

ERO-10 Training Template Specs

1040 Wkt1 (Add to tree)

Social security received this year (Taxpayer)	Make red	To keep form in tree
---	----------	----------------------

Sch A Pg 1 (Add to tree)

Line 6 3 rd box	Make red	To help preparers get Prop Tax in right box and remember to input even if not itemizing
----------------------------	----------	---

Sales Tax Worksheet (Add to tree – Must link from Sch A, line 5b)

Line 1	Enter “NJ”	
Line 3	Check No	

A Detail (Add to tree)

Medical mileage	Enter “1”	To keep form in tree without making something else Red
-----------------	-----------	--

Sch B (Add to tree)

Seller-financed mortgages / Name	Make un-red	
----------------------------------	-------------	--

Interest Stmt (Add to tree – Must use link from Sch B)

Line 1 / Payer	Make red	To keep form in tree
----------------	----------	----------------------

Dividend Stmt (Add to tree – Must use link from Sch B)

Line 1 / Payer	Make red	To keep form in tree
----------------	----------	----------------------

Sch C Pg1 (Add to tree)

E Business address...	Make un-red	Only need if different
F Accounting method	Select Cash	
G Did you “materially participate”...	Select Yes	
I Did you make any payments in 2011 that would...	Select No	

Sch C Pg2 (In tree)

Check – to calculate business miles...	Check box	
--	-----------	--

ERO-10 Training Template Specs

8949 Pg1 (Add to tree)

3a Description of property	Link to Cap Gn Wkt	
----------------------------	--------------------	--

Cap Gn Wkt (Added from 8949 Pg 1)

[Note: shows up in tree below Main Info – no known way to get it down with Sch D]

This seems to stay in the tree without needing to make anything red

8949 Pg1 (Remove from tree)

8949 will be added automatically when something is entered on Cap Gn Wkt Sch D will be added automatically when 8949 is filled in
--

W2 (Add to tree)

Box 14 / Line 1 / Type	Enter "NJSDI"	
Box 14 / Line 1 / Amount	Make un-red	(may need to refresh)
Box 14 / Line 2 / Type	Enter "NJSUI"	
Box 14 / Line 2 / Amount	Make un-red	(may need to refresh)
Box 14 / Line 3 / Type	Enter "NJFLI"	
Box 14 / Line 3 / Amount	Make un-red	(may need to refresh)
Box 15 / State	Enter "NJ"	

F/S Tax Paid (Add to tree)

NJ state and/or local balance due from previous years' returns paid in 2011. Include amounts paid with a 2010 extension paid in 2011	Make red	To remind preparer that balance due (and paid) should be added
--	----------	--

1099G Wkt (Add to tree)

1 Payer's Name	Enter "NEW JERSEY DEPARTMENT OF LABOR"	
1 Payer's EIN	Enter 22-2481818	

1099R (Add to tree)

Box 13 / State	Enter "NJ"	
----------------	------------	--

2210 Pg1 (Do NOT add if not already in tree)

9 Required annual payment	Make sure not override to zero	
---------------------------	--------------------------------	--

ERO-10 Training Template Specs

8879

Your EFIN	Enter <Site EFIN>	Site Specific	Lock
ERO's ID	Leave blank		Lock
Also paid preparer	Leave un-checked		Lock
SSN	Leave blank		Lock
PTIN	Enter "24000000"	Site Specific	Lock
Self-employed	Leave un-checked		Lock
ERO Signature	Leave blank		Lock
Print signature	Check box		Lock
Firm's name	Enter "Training"	Site Specific	Lock
EIN	Make un-red	Would like to Lock, but causes problems if do	
Firm's address	Enter "One Newark Center"	Site Specific	Lock
Phone	Enter "201-555-1111"	Site Specific	Lock
Zip code, City, State	Enter "07102"	Site Specific	Lock
IRS only	Check box		Lock

ERO-10 Training Template Specs

New Jersey

NJ 1040 Pg1 (Already in tree)

Check if VITA or TCE	Check box		Lock
----------------------	-----------	--	------

NJ 1040 Pg3 (Already in tree)

Line 44 Enter the amount of out-of-state purchases	Make red	To remind preparer to discuss Use Tax alternatives and potential penalties with TP
--	----------	--

NJ 1040 Pg4 (Already in tree)

Do you want to electronically file this return?	Check Yes	
---	-----------	--