

## 4491-W-03 Beringer Refund Monitor TY2011

Filing Status: Head of Household

12-23-2011 v1-1a

### Errata – Fix before doing problem

Problem	Page	Location	Change From:	Change To:	Logic

Step	TP Form/ Note(s)	TW Form	Payee/Name	Fed 37 AGI	Fed 74/76 Refund	4012 page	Notes
1	Intake etc. Notes 1, 2, 9	<a href="#">Main Info</a> <a href="#">Prep Use</a>				B-1 C-3 1-8	Hint: Use 4012 to find Filing Status and evaluate dependency status
	W-2	<a href="#">W2</a>	Mount Peace Associates Inc	35,689	2,891		
	SSA-1099	<a href="#">1040 Wkt1</a>	Social Security	52,143	(690)		BP: Save Lump Sum until later
		<a href="#">1040 Pg 1</a>	Still red – resolve	52,143	(690)		
		1040 Pg 2	Still red	52,143	(690)		BP: Red only because owe - resolve after deal with Lump Sum (may no longer owe)
		Diagnostics		52,143	(690)		No errors
	Notes 5, 6, 7	<a href="#">1040 Wkt1</a> <a href="#">Lump Sum Wkt</a> <a href="#">Lump Sum Wkt</a>	Lump Sum Election	49,884	(353)	2-20	Hint: See Special Topic document on TY2011 Preparer page
		<a href="#">1040 Pg 2</a>	Still red – resolve	49,884	(353)		
		Diagnostics		49,884	(353)		No errors
		Create e-file		49,884	(353)		E-file created successfully
				49,884	(353)		Ask your mentor for Quality Review

Values with pink background – changed from previous

Click on links in TW Form column to see screen shot of completed TWO form (you may need to click on the picture to enlarge it)

[Printed return – click here](#)

[Printable version of this page – click here](#)

Please report additions/corrections to [Al Hershey](#)