

4491-W-11 Fleming Refund Monitor TY2011

Filing Status: Head of Household

12-04-2011 v1-1a

Errata – Fix before doing problem

Problem	Page	Location	Change From:	Change To:	Logic
Fleming					

Step	TP Form/ Note(s)	TW Form	Payee/Name	Fed 37 AGI	Fed 74/76 Refund	4012 page	Notes
1	Intake etc. Note 2 Note 6 Note 7	Main Info Prep Use				B-1 1-8	Hint: Use 4012 to find Filing Status
2	W-2	W2	Oakwood World-Herald	14,598	7,114	2-3	
3	W-2	W2	Butler, Inc.	17,130	7,226	2-3	
4	1099-INT	Interest Stmt	Parks National Bank	17,547	7,141	2-5	
5	1099-R Note 4	1099R	Northern Financial Services	22,547	5,839	2-17	
6	1099-R Note 8	1099R	Tri-State Publishers	27,947	4,162	2-17	Hint: Code 3 is disability (Where would you look to find this out?) Hint Use context sensitive help on “Check if disability...” box
7	1099-MISC Note 1	Sch C Pg 1 Sch C Pg 2 1099-MISC	Wright Publishing	34,694	843	2-8	Hint: Link from line 1b of Sch C to add 1099-MISC Hint: Enter WP Course now – we’ll deal with Note 9 later
8	1099-G	1099G Wkt	Ohio Unemployment Commission	36,039	492		
9	Note 2	1040 Pg 1	Alimony	38,439	(373)	E-3	Hint: Don’t worry about line 10 question now
10	Note 3	Interest Stmt	Global Investment Service	38,439	(373)	2-5	
11	Note 7	2441 Pg 1	Salem Day Care Center	38,439	39	5-3	
12	Note 5	1040 Pg 1	Still red – resolve	38,439	39		
13		Sch EIC Wkt	Still red – resolve	38,439	39	6-6	
14		Diagnostics		38,439	39		No errors
15x	Note 9	1040 Wkt2	Test WP Course as AGI deduction	38,398	(15)		Testing only

Step	TP Form/ Note(s)	TW Form	Payee/Name	Fed 37 AGI	Fed 74/76 Refund	4012 page	Notes
15x	Note 9	8863 Pg 1	Test WP Course as Lifetime Learning	38,973	(116)		Testing only
16		Create e-file		38,439	39		E-file created successfully
17				38,439	39		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](#)