

4491-W-07 Moore Refund Monitor TY2011

Filing Status: Qualifying Widow(er)

11-23-2011 v1-2

Errata – Fix before doing problem

| Problem | Page | Location | Change From: | Change To: | Logic |
|--------------|------|-----------------------------|------------------------------|-------------------------------|--------------------------|
| Moore | 63 | Interview notes, 6th bullet | ...University of Florida.... | ...University of Columbus.... | Fix to agree with 1098-T |

| Step | TP Form/ Note(s) | TW Form | Payee/Name | Fed 37 AGI | Fed 74/76 Refund | 4012 page | Notes |
|------|-------------------------------------------|----------------------------------------------------------|-------------------------------------|---------------|---------------------|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Intake etc. Note 1 Note 6 Note 7 | Main Info | | | | B-1 1-8 | Hint: Use 4012 to find Filing Status Hint: Check EIC box for all dependents who might qualify for EIC' Q: Did you put anything on % address line? |
| 2 | Intake etc. | Prep Use | | | | | |
| 3 | W-2 | W2 | HAWTHORN GENERAL HOSPITAL | 35,965 | 5,075 | 2-3 | Hint: Fill in box 12 before override 3, 4, 5, 6 Hint: Double check box 6 |
| 4 | 1099-INT | Interest Stmt | A. BEAN BANK & TRUST | 36,254 | 4,981 | 2-5 | |
| 5 | W-2G Note 5 | W2G | HESSER CASINO | 37,754 | 4,515 | | Hint: May need to add W2G (if not in tree) BP: Include corresponding losses |
| 6 | 1098-T | | UNIVERSITY OF COLUMBUS | 37,754 | 4,515 | | BP: Save until end so can do comparison of various education options with all other amounts included |
| 7 | 1099-G | 1099G Wkt | EMPLOYMENT SECURITY COMMISSION | 39,508 | 4,070 | | |
| 8 | CSA-1099R | 1099R | OFFICE OF PERSONNEL MANAGEMENT | 56,078 | 3,729 | 2-17 2-19 | Hint: See Special handling of CSA on page 2-19 of p4012 |
| 9 | Note 3 | 1040 Wkt2 | Student Loan Interest | 55,692 | 3,789 | E-5 | Hint: May need to add 1040 Wkt2 |
| 10 | Note 4 | Interest Stmt | York Municipal Bonds | 55,692 | 3,789 | 2-5 | |
| 11 | Note 11 | 1040 Pg 1 | Still red – resolve | 55,692 | 3,789 | | Hint: Assume Hilda did not itemize last year Hint: Run diagnostics if you don't know what to put on line 21 |
| 12 | | Sch EIC | Still red – resolve | 55,692 | 3,789 | 6-5 | Hint: Answer questions in order and only if red |
| 13 | | Diagnostics | | 55,692 | 3,789 | | No errors – ready to do education comparison |
| 14x | | 1040 Wkt2 | Test Education as AGI deduction | 51,692 | 4,389 | | Testing Only |
| 14x | | 8863 Pg 1 | Test Education as Lifetime Learning | 55,692 | 4,522 | | Testing only |
| 14 | 1098-T Note 6 | 8863 Pg 1 Scratch Pad | UNIVERSITY OF COLUMBUS | 55,692 | 6,289 | 5-4 | Hint: May need to add 8863 BP: Use Scratch Pad to document calculation from 1098-T |

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|------|---------------------|---------------|------------|---------------|---------------------|--------------|----------------------------------------------|
| 15 | | Diagnostics | | | | | No errors |
| 16 | | Create e-file | | | | | As of 11-22-11 – getting spurious MEF errors |
| 17 | | | | | | | Ask 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](#)

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