

## PRO-P1 Moore Review Guide

Intake Sheet, page 4, Section B:

1: No	2: No	3: No	4: Yes – All	5: Yes – All
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E-file created: No longer possible for TY2011

AGI: 55,692

Refund/(Amount owed): 6,289

Diagnostic:

Overridden Entries:

Overridden Entry 'W2ADDR' on 'Wage and Tax Statement'  
(ditto for 'W2ADDR2', 'W2ZIP', 'W2CITY', 'W2STATE', 'LINE-3', 'LINE-4', 'LINE-5' and  
'LINE-6')

Estimated Entries: Dependent on Template used to create return

TW Screen	Payee/Name/Line	Comment/Reference
Main Info	Address	% line NOT filled in
	Filing Status	Qualifying widow(er)
	Dependents	Best Practice: list in order of age, youngest first Last name of dependent may be omitted if same as primary taxpayer.
1040 Pg 1	Line 21	“GAMBLING WINNINGS”
Interest Stmt	York Municipal Bonds	NAEOB = E, NAEOB Amount = 450 No entry in Box 1 or 3 & No state adjustments
Sch EIC	All	4a for Ronald is Yes. No other 4a or 4b questions answered.
Sch EIC Wkt	All	Unnecessary questions unanswered e.g. 4b, 9b, 9c, 9d
W-2	Hawthorn General Hospital	Best Practice: Fix address (even if AVE -> AVENUE)
		Take calculations off 3, 4, 5, 6 is CHECKED Lines 3 & 5: 37,622; Line 4: 1,580; Line 6: 543
		Line 14: NJSDI 148 NJSUI 126 NJFLI 18
		Line 15: NJ; line 16: 35,965; line 17: 725
W-2G	Gambling losses	2,000
1099-R	OPM Pension	No entries in Simplified Method section
8863	Univ of Columbus 1098-T amount in box 1(c)	Best Practice: Scratchpad with: Payments: 16,900; Minus scholarship: -10,000; Minus adj for 4,000 limit: -2,900 = 4,000
All	TSJ boxes	Either T or blank

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### New Jersey

Form	Payee/Name/Line	Comment/Reference
NJ 1040 Pg1	County/Municipality code	0710
NJ 1040 Pg3	Line 11 [Dependents attending colleges]	0 Ronald is not under age 22
	Line 13c [Dependent's information]	Check for Ronald in Dependent does not have health insurance. <b>This must be entered on NJ Dep Wkt</b>
	Gubernatorial Fund	Taxpayer: No
	Line 28 [NJ Gross Income]	52,824
	Line 36a [Total Property Taxes Paid]	1728 [From Worksheet F]
	Line 36c [Property Tax Deduction]	0 [From Worksheet F]
	<b>Line 37 [NJ Taxable Income]</b>	<b>47,324</b>
NJ 1040 Pg4	Line 47 [Total NJ Income Tax Withheld]	725
	Line 48 [Property tax credit]	50 [From Worksheet F]
	<b>Line 65 [Refund]</b>	<b>17</b>
	Worksheet F, Line 1, Rent you paid . . .	9600
NJ Dep Wkt	Ronald Moore	Check in Dep does not have health ins
NJ DD Wkt	Direct Deposit and Direct Debit . . .	Check to have check mailed