

4491-W-08 Webster Refund Monitor TY2011

Filing Status: Head of household

01-17-2012 v2-2

(Corrections made to Screen Shots & Printed return due to updated Sales Tax tables – some Refund Monitor numbers changed)

Errata – Fix before doing problem

Problem	Page	Location	Change From:	Change To:	Logic
Webster	73	W-2 AW CONTRACTING, box b	11-5XXXXXX	11-5xxxxxx	Need more digits

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 3 Note 5	Main Info Prep Use				B-1 1-8	Hint: Use 4012 to find Filing Status
2	W-2	W2	AW CONTRACTING SERVICES	40,461	602	2-3	
3	1099-INT	Interest Stmt	HAMPTON FIRST NATIONAL BANK	41,437	556	2-5	
4	Expenses	Sch A Sales Tax Scratch Pad Scratch Pad A Detail		41,437	946	F-8 4-2	Hint: Assume Mortgage was on 1098 BP: Use Scratch Pad for Prop Tax calculation and for Mtg calc
5	Note 5	2441 Pg 1	Sheryl Hayden	41,437	1,261	G-2 5-3	
6	Note 8	1040 Pg 1 St Tax Refund	State refund	41,924	1,186		Q: Why is refund only partially taxable?
7	Note 9 Note 10	5695 Pg 1	Windows	41,924	1,345	G-9	
8		Diagnostics		41,924	1,345		No errors
9	Note 7	Main Info 1040 Pg 2	Direct deposit	41,924	1,345	12-5	
10		Diagnostics		41,924	1,345		No errors
11		Create e-file		41,924	1,345		Application error on 01-17-2012
12				41,924	1,345		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](#)