

4491-W-09 Baylor Refund Monitor TY2011

Filing Status: Married filing jointly

01-17-2012 v1-2

(Corrections made to Screen Shots & Printed return due to updated Sales Tax tables – no Refund Monitor numbers changed)

Errata – Fix before doing problem

Problem	Page	Location	Change From:	Change To:	Logic
Baylor	101	W-2G CASINO REALE	(866) 555-xxx	(866) 555-xxxx	Should have all digits in telno

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 3	Main Info				B-1 1-8	Hint: Use 4012 to find Filing Status Hint: Use context sensitive help to help fill in % address line?
2	Intake etc.	Prep Use					
3	1099-DIV	Dividend Stmt	The Lone Star Fund	2,302	0	2-6	
4	1099-R	1099R	Defense Finance & Accounting SVC	26,221	1,580	2-17	Hint: Look at NJ Special Handling
5	1099-R	1099R	Harris Trust	39,444	297	2-17	
6	SSA-1099 TP	1040 Wkt1 Scratch Pad	Social Security - TP	46,717	(289)	2-19	BP: Use Scratch Pad for Part B + Part D
7	SSA-1099 SP	1040 Wkt1	Social Security - SP	50,083	(491)	2-19	
8	W-2G Note 5	W2G	CASINO REALE	52,303	(621)		Hint: May need to add W2G (if not in tree) BP: Include corresponding losses
9	Note 7	Sch A A Detail Sales Tax Scratch Pad	Various deductions	52,303	(14)	4-2 4-4	Hint: Be sure to change state field on on Sales Tax worksheet to IN
10	Note 4	1040 Pg 1	Still red – resolve	52,303	(14)		Hint: Lines 10 and 21
11	Note 6	1040 Pg 2	Still red – resolve	52,303	(14)		
12		Sch B	Still red – resolve	52,303	(14)		Hint: Assume no foreign stuff
13		Diagnostics		52,303	(14)		No errors
14		Create e-file		52,303	(14)		As of 01-17-2012 – Getting Application error
15				52,303	(14)		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](#)