

## FAM-02 Conway Refund Monitor

Filing Status: Married Filing Jointly

09-28-2012 TY2011 v1.0-1

Process	Step	TP Form/ Note(s)	TW Form	Payee/Name	AGI	Refund	NJ 37	NJ 55/65	Notes
Main Info & Prep Use	1	Intake etc. Note 1	<a href="#">Main Info</a> <a href="#">Prep Use</a>						
Documents	2	W-2	<a href="#">W-2</a>	Vampire Engineering	32,867	3,112			Hint: Address is different – Click “Check and make changes” in the address area and enter address from actual W-2 Hint: Don’t worry about fixing values in boxes 3, 4, 5, 6 until after box 12 entries made Hint: You must check the box by “Check to take calculations off of line 16” in order to edit box 16
	3	W-2	<a href="#">W-2</a>	Smart Kids Charter Schools	53,043	3,596			Hint: Hover on W-2 in tree and click on “+” to add a second W-2 worksheet
	4	1099-G	<a href="#">1099-G Wkt</a>	NJ Department of Labor	62,903	3,097			
Remove Red (Fed only)	5	Note 2	<a href="#">1040 Pg1</a>		62,903	3,097			Prep Use form will remain red until QR is complete
Run Diagnostics	6		<a href="#">Diagnostics</a>		62,903	3,097			Errors: None
NJ 1040	7	Note 7	<a href="#">NJ 1040 Pg1</a>		62,903	3,097	52,043	569	
	8	Note 5 Note 6	<a href="#">NJ 1040 Pg3</a>		62,903	3,097	52,043	464	Hint: You must enter amount paid in box to left on line 44 (amount of tax is then calculated)
	9	Note 3	<a href="#">NJ 1040 Pg4</a> <a href="#">Scratch Pad</a>		62,903	3,097	48,263	544	BP: Use Scratch Pad to document total rent calculation
Remove Red	10	Intake Page 3	<a href="#">Main Info</a> <a href="#">1040 Pg2</a> <a href="#">NJ DD Wkt</a>		62,903	3,097	48,263	544	Hint: Enter RTN# and Acct# on both Main Info and 1040 Pg2 for federal refund Hint: Check first box on NJ DD Wkt under Direct Deposit to use same as federal Prep Use form will remain red until QR is complete
Run Diagnostics	11		<a href="#">Diagnostics</a>		62,903	3,097	48,263	544	Errors: None

Create E-File	12	<a href="#">Diagnostics</a>		62,903	3,097	48,263	544	A second diagnostic is run when creating an efile. Errors: None
Quality Review	13							Ask your coach to do QR

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](#)

[Scenario Writeup – click here](#)

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