

## FAM-06 Barufkin Refund Monitor

Filing Status: Married Filing Jointly

TY2011 10-13-2011 v1.1-1

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 Note 2	<a href="#">Main Info</a> <a href="#">Prep Use</a>						BP: List dependents from youngest to oldest Hint: Use Code "1 – Your Child who Lives with You" for both children Hint: Do NOT check the DC box for either child Hint: Check the EIC box for both children
Documents	2	W-2	<a href="#">W-2</a>	United Airlines (TP)	22,810	9,171			
	3	W-2	<a href="#">W-2</a>	United Airlines (SP)	35,990	5,718			Hint: To get second W-2 worksheet, hover over existing W-2 in tree and click on "+" Hint: Employer info will fill in automatically after typing in same EIN
Remove Red (Fed only)	4	Note 3	<a href="#">1040 Pg1</a>		35,990	5,718			
	5	Intake Note 6 Note 7 Note 8 Note 9	<a href="#">Sch EIC Wkt</a>		35,990	5,718			BP: Answer questions in order from top to bottom and left to right BP: Answer <b>only</b> those questions that are red and wait for redness to automatically adjust after each answer
Run Diagnostics	6		<a href="#">Diagnostics</a>		35,990	5,718			Errors: None
NJ 1040	7	Note 10	<a href="#">NJ 1040 Pg1</a>		35,990	5,718	30,990	896	
	8	Note 5 Note 11 Note 12	<a href="#">NJ 1040 Pg3</a>		35,990	5,718	30,990	896	Hint: Use ctrl-Space or F3 to remove red from box on line 44
	9	Note 4	<a href="#">NJ 1040 Pg4</a>	Rent	35,990	5,718	30,990	946	Hint: Rent goes on Worksheet F
Remove Red	10	Intake	<a href="#">NJ DD Wkt</a>		35,990	5,718	30,990	946	
Run Diagnostics	11		<a href="#">Diagnostics</a>		35,990	5,718	30,990	946	Errors: None
Create E-File	12		<a href="#">Diagnostics</a>		35,990	5,718	30,990	946	A second diagnostic is run when creating an efile. Errors: None
Quality Review	13				35,990	5,718	30,990	946	Ask your coach to do QR

Values with pink background – changed from previous row of Refund Monitor

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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