

**TY2010 Fam05 – McCook**  
 Filing Status: Married Filing Jointly  
 09-17-2011 v3-1

Process	Step	TP Form/ Note(s)	TW Form	Payee/Name	AGI	Refund	NJ 37	NJ 55/65	Notes
Main Info	1	Intake etc. Note 1 Note 3 Note 4	<a href="#">Main Info</a>						Hint: Do not enter spouse last name if same as primary TP Hint: Presidential Election Campaign boxes are right before Filing Status and Exemptions
Documents	2	1099-DIV	<a href="#">Dividend Stmt</a>	Oppenheimer Fund	600	50			Hint: Dividend Stmt worksheet is under Sch B in tree
	3	1099-R	<a href="#">1099R</a>	Phoenix Investment Partners	12,850	1,275			Hint: 1099R worksheet is about half-way down the tree
	4	1099-R	<a href="#">1099R</a>	Ameritech Pension Fund	26,073	2,140			Hint: To get second 1099R worksheet, hover over existing 1099R in tree and click on "+"
	5	SSA-1099	<a href="#">1040 Wkt1</a>	Social Security (TP)	26,301	3,392			Hint 1040 Wkt1 is close to top of tree Hint: Round --.50 up
	6	SSA-1099	<a href="#">1040-Wkt1</a>	Social Security (SP)	28,851	4,157			
Remove Red (Fed only)	7	Note 2	<a href="#">1040 Pg1</a>		28,851	4,157			
Run Diagnostics	8		<a href="#">Diagnostics</a>		28,851	4,157			Errors: None
NJ 1040	9	Note 8	<a href="#">NJ 1040 Pg1</a>		28,851	4,157	0	0	
	10	Note 3 Note 4 Note 9	<a href="#">NJ 1040 Pg3</a>		28,851	4,157	0	0	Hint: Use ctrl-Space to remove red from box on line 44
	11	Note 5	<a href="#">NJ 1040 Pg4</a>	Rent	28,851	4,157	0	50	Hint: Rent goes on Worksheet F
Remove Red	12	Note 6 Check	<a href="#">Main Info</a> <a href="#">1040 Pg2</a> <a href="#">NJ DD Wkt</a>		28,851	4,157	0	50	Hint: Input federal DD info first, then can just click "Check here if you had a federal refund..." on NJ DD Wkt Hint: Must type RTN and Acct #s on both Main Info and 1040 Pg2
	13	Note 10	<a href="#">NJ IRA Wkt</a>	Ameritech Pension Fund	28,851	4,157	0	50	Hint: Enter "1" in red box for "Enter the copy number of the IRA..." Hint: Use ctrl-Space to remove red from Part I line 4a and Part II line 2
Run Diagnostics	14		<a href="#">Diagnostics</a>		28,851	4,157	0	50	Errors: None
Quality Review	15				28,851	4,157	0	50	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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