

TY2010 PRO-P2 – Baylor Refund Monitor

Filing Status: Married filing jointly

11-16-2011 v2-1

Step	TP Form/ Note(s)	TW Form	Payee/Name	Fed 37 AGI	Fed 74/76 Refund	NJ 37 Taxable	NJ 55/65 Refund	4012 page	Notes
1	Intake etc. Note 2 Note 3	Main Info						1-7	Hint: Use 4012 to find Filing Status Hint: Use context sensitive help to help fill in % address line?
2	1099-DIV	Dividend Stmt	The Lone Star Fund	2,302	0			2-6	
3	1099-R	1099R	Defense Finance & Accounting SVC	26,221	1,580			2-11	Hint: Look at NJ Special Handling
4	1099-R	1099R	Harris Trust	39,444	1,252			2-11	
5	SSA-1099 TP	1040 Wkt1 Scratch Pad	Social Security - TP	46,717	631			2-13	BP: Use Scratch Pad for Part B + Part D
6	SSA-1099 SP	1040 Wkt1	Social Security - SP	48,400	684			2-13	
7	W-2G Note 4	W2G	CASINO REALE	50,620	546				Hint: Need to add W2G (if not in tree) BP: Include corresponding losses
8	Note 9	Sch A Pg 1 A Detail	Various deductions	50,620	1,079			4-2 4-4	
9	Note 10	Sales Tax	Sales tax on NEW car	50,620	1,289				Hint: Purchase was after 1-1-2010
10	Note 11	Scratch Pad	PTR rebate	50,620	1,259				Hint: See NJ Special Handling
11	Note 8	1040 Pg 1	Still red – resolve	50,620	1,259				Hint: Lines 10 and 21
12	Note 12	Sch B	Still red – resolve	50,620	1,259				
13		Diagnostics		50,620	1,259				No errors
14	Note 13	NJ 1040 Pg1		50,620	1,259	0	120		Hint: Use NJ Special Handling Q: Why no NJ Taxable Income?
15	Note 14 Note 15	NJ 1040 Pg 3		50,620	1,259	0	120		
16	Note 11	NJ 1040 Pg 4		50,620	1,259	0	170		
17	Note 5	NJ DD Wkt	Still red – resolve	50,620	1,259	0	170		
18		NJ Ret Wkt	Still red – resolve	50,620	1,259	0	170		
19		Diagnostics		50,620	1,259	0	170		No errors

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20				50,620	1,259	0	170		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](#)

[Scenario Writeup – click here](#)

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