

NJ11-P3 – Davis Refund Monitor

Filing Status: Single

01-19-2012 v1-2

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

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. Notes 1, 2	Main Info Prep Use						1-7	Hint: Use 4012 for Filing Status and Dependency issues
2	W-2	W2	Dale's Camera Shop	10,000	577			2-3	
3	Note 3	1040 Pg 1	State tax refund	10,013	577				Hint: See NJ Special Handling
4	Note 4 Note 5	Sch C Pg 1 Sch C Pg 2	Photographic Services	11,947	131			2-8	Hint: Use TWO Program Help to look up Business code
5	Note 6	Line 21	Jury duty	11,962	126			2-2	Hint: Link to Line 21 worksheet from 1040 Pg1 line 21
6	Note 5	Sales Tax	Sales tax on car	11,962	126				Hint: Sch A line 5b = 700
7	Note 7	A Detail	Dental work	11,962	126				Hint: Sch A line 4 = 3,103
8	Note 8	A Detail	Church donations	11,962	186				
9	Note 9	A Detail	Volunteer work	11,962	201				
10		Sch A	If still red – resolve	11,962	201				
11		Diagnostics		11,962	201				No Errors
New Jersey return – Follow NJ Special Handling line by line									
12	Intake etc.	NJ 1040 Pg1	County/Municipality Code	11,962	201	7,338	197		Hint: Check Initial NJ Values Hint: Lookup available from Preparer page
13	Note 10	NJ 1040 Pg3	Gubernatorial	11,962	201	7,338	197		
14	Note 4 Note 11	NJ 1040 Pg3 Scratch Pad	Use Tax	11,962	201	7,338	79		
15	Note 13	NJ DD Wkt	Still red – resolve	11,962	201	7,338	79		
16		Diagnostics		11,962	201				No Errors
17		Create e-File(s)		11,962	201				E-files created successfully
				11,962	201				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](#)

[Printable version of this page – click here](#)