

PRO-P1 Moore Review Guide

Intake Sheet, page 1, Shaded Area

1: No-All	2: No-All	3: Yes-All	4: Yes – All	5: Yes – All
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E-file created

AGI \$60,720

Refund/(Amount owed): \$6,284

Diagnostic:

Warnings :

There is a refund on the tax return and no direct deposit information has been filled in. Is this correct? (W49)

Overridden Entries:

[Overridden Entry 'LINE-16A' on 'Wage and Tax Statement'](#)

Could vary depending on how the W-2 Line 12 entries were entered

Estimated Entries: Dependent on Template used to create return

Federal

TW Screen	Payee/Name/Line	Comment/Reference
Main Info	Address	% line NOT filled in
	Filing Status	Qualifying widow(er) Year of Death 2011
	Dependents	Best Practice: list in order of age, youngest first (Deloris, Edna, Ronald) Last name of dependent may be omitted if same as primary taxpayer. EIC boxes should be checked for each dependent. All dependents are Code 1 Presidential Election Campaign Fund not checked
Prep Use Form	Line 11,12,13,14	Line 11 – None Line 12 - No Line 13 – Preparer's Initials Line 14 – Blank and Red
1040 Pg 1	Line 10	Itemizing box should be check NO. Amount in Line 10 should be 0
1040 Pg 1	Line 21	"GAMBLING WINNINGS"
1040 Pg 1	Line 33	358
A Detail	Insurance premiums paid / Taxpayer	1,150 Note: 660 pre-tax should NOT be shown here
Interest Stmt	JTE Mutual Fund	NAEOB = E, NAEOB Amount = 450 No entry in Box 1 or 3 & No state adjustments
Sch EIC	All	4a for Ronald is Yes. No other 4a or 4b questions answered.

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TW Screen	Payee/Name/Line	Comment/Reference
W-2	Hawthorn General Hospital	Best Practice: Address should read AVENUE)
		Take calculations off 3, 4, 5, 6 is CHECKED 0r box 12 was entered first. Lines 3 & 5: 37,622; Line 4: 2,333; Line 6: 546 Take calculations off of line 16 is CHECKED
		Line 13 – Retirement Plan Box Checked
		Line 14: NJSDI 111 NJSUI 131 NJFLI 31
		Line 15: NJ; line 16: 36,625; line 17: 725
W-2G	Gambling losses	2,000
1099-R	OPM Pension	Line 5 = 1,150 No entries in Simplified Method section
1099-R	Northern Financial Services	No entries in Simplified Method section Line 4: 500 Line 7: Code 1 IRA Box Checked Line 12: 100 Line 13: 238XXXXXX
5329 TP 1	Northern Financial Services	Line 2: Code: 08, Amount: 5,000
8863	Univ of Columbus 1098-T Line 27	Line 20: Ronald Moore Line 21: 313-xx-xxxx Line 22 Line a: University of Columbus Line 1: 677 D Jones University Drive 43216 Columbus OH Line 2 : Yes Line 3: No Line 4: 10-6xxxxxx Line 23: No Line 24: Yes Line 25: No Line 26: No Line 27: Best Practice: Scratchpad with: Payments: 16,900; Minus scholarship: -10,000; Minus adj for 4,000 limit: -2,900 = 4,000
All	TSJ boxes	Either T or blank

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New Jersey

Form	Payee/Name/Line	Comment/Reference
NJ 1040 Pg1	County/Municipality code	0710
NJ 1040 Pg 2	Line 11 [Dependents attending colleges]	0 Ronald is not under age 22
	Line 13c [Dependent's information]	Check for Ronald in Dependent does not have health insurance. This must be entered on NJ Dep Wkt
	Gubernatorial Fund	Taxpayer: No
	Line 19b	Total on line 19b= 3,015 (2,000+ 1015)
	Line 19b Scratch Pad	There should be a scratch pad attached to 19b Line 1: 17,585 Line 2: - 16570
	Line 28 [NJ Gross Income]	56,484
	Line 30 [Medical expenses]	680 (660 after-tax ins added via scratch pad)
	Line 37a [Total Property Taxes Paid]	1,728 [From Worksheet F]
NJ 1040 Pg 3	Line 37c [Property Tax Deduction]	0 [From Worksheet F]
	Line 38 [NJ Taxable Income]	50,304
	Line 48 [Total NJ Income Tax Withheld]	825
	Line 49 [Property tax credit]	50 [From Worksheet F]
	Line 66 [Refund]	62
	Worksheet F, Line 1, Rent you paid...	9,600
NJ Dep Wkt	Ronald Moore	Check if Dep does not have health ins
NJ DD Wkt	Direct Deposit and Direct Debit . . .	Check to have check mailed
NJ IRA Wkt	Enter copy number...	1
	Line 1	45,000
	Line 4a	20,000
	Part II	No entries