**2020 ProConnect Tax Online Lab Instructions, Whittenburg, Gill**

We will be using Intuit’s ProConnect Tax Online software to prepare federal income tax returns. We will not be filing the tax returns though! To create an Intuit account, go to:

<https://taxeducation.intuit.com>

Do **not** use the typical ProConnect commercial site (proconnect.intuit.com). It will require additional payment to print or download the returns. It is recommended that the Google Chrome or Mozilla Firefox browser be used to best support ProConnect Tax Online. At the bottom of the educational site, click on *Create an account.* Enter your email address and create a password. Enter your first and last names, your phone number, and for Firm name, enter a company name of your choosing. Each time you log in to the software, you will receive a Welcome screen with various information that you may browse to learn more about the software. When you are ready to begin completing the tax returns for the Group 4 and 5 problems in your textbook, select Tax Returns on the left margin.

**Group 4, Problem 1A: Banyan, Patty**

Sign in to your Intuit account and from the Welcome screen, select Tax Returns in the left margin. You will have landed on the *Tax Returns 2019* page and you should select the *Create tax return* in the upper right corner*.*

From the *Create tax return* screen, click the [+] for *Add new* and select the *Individual (1040,709)* button (it is selected as the default)*.* Fill out the information for Patty. Email and phone numbers are not required but you may enter assumed data if you wish. Click on *Save* at the lower right. On the next screen *Client*, you may review the information you input, make any corrections necessary through the *Edit* button on the upper right, and once satisfied, click on *Save* at the lower right.

You have now landed on Patty’s 1040 *Profile* page. You may unselect *Select for E-file* for the *Federal* line under *General* since you will not actually be filing the tax return, but it is not required. From the tabs near the top, select *Input Return*. Under *Views* from the top left, click on *All*. You will now see *Details:* *Client Information.* Scrolling down through the client information, enter Patty’s occupation. Continue to scroll down to the bottom of the *Client Information Details, under Miscellaneous Info,* find *Prepared by* and*,* select 3 for *Self-Prepared* from the dropdown box.

From the menu at the left, select *Income; Wages, Salaries, Tips (W-2); Wages.* Click on the upper left icon, to the left of New Tab, that looks like a sheet of paper. This takes you to the *Quick Entry: Wages, Salaries, Tips* screen*.* Enter the amounts of Patty’s wages and federal income tax withheld. The information entered is saved automatically. You can click the same icon to return to detailed entry at any time.

From the menu at the top, select *File Return*. From the menu at the left, under *Print*, select *View/Print Return PDF.* Click the blue *View Return PDF* button. The return should open in a new tab. Review the return and then download it – remember where you save it. Close the PDF.

Don't be afraid to explore the program - you cannot hurt anything!

**Group 4, Problem 1B: Banyan, Patty**

**Do NOT add a new client.** The easiest way to handle the change in birthdate is to copy the tax return for Patty Banyan prepared in Problem 1A (otherwise, simply follow the instructions for Problem 1A with the revised birthdate). Click on *Tax Returns* in the left-hand margin and use the *View return* dropdown to *Copy Return*. If you select the copy by clicking the name, you may *rename* the return under the same *View return* dropdown box. You may then change Patty’s birthdate under the *Input Return* tab at the top and the *General; Client Information; Taxpayer Information* items on the left. The tax return will be changed to the Form 1040-SR by the tax software.

From the menu at the top, select *File Return*. From the menu at the left, under *Print*, select *View/Print Return PDF.* Click the blue *View Return PDF* button. The return should open in a new tab. Review the return and then download it – remember where you save it. Close the PDF.

**Group 4, Problem 2A: Knox, Dora and Hardy**

Sign in to your Intuit account and click *Tax Returns* on left. Then click *Create tax return* on the upper right. Click the [+] for *Add new* and select the *Individual* button and fill out the information for Dora Knox. Email and phone numbers are not required but you may enter assumed data. Click on *Save* at the lower right. On the next screen*Client*, you may review the information you input, make any corrections necessary through the *Edit* button on the upper right, and once satisfied, click on *Save* at the lower right. Under the *Profile* tab, you may want to unselect the *Select for E-file* buttons that are selected by default in the software.

From the tabs near the top, select *Input Return*. From the menu at the left, select *General; Client Information.* The *Filing Status* will appear on the right. Change filing status to *Married filing jointly*. Check the *Live With Spouse* box. Scroll down this page and enter the *Occupation* for Dora and the Spouse Information for Hardy. Continue to scroll down this page and toward the bottom, under *Miscellaneous Info,* find *Prepared by* andselect 3 for *Self-Prepared*.

Note: Fort Knox should not have been entered into the software as a dependent. Fort is not a dependent as he does not qualify as a qualified child (age and not a full-time student) or qualified relative (fails gross income test). If you incorrectly entered Fort’s information, the easiest way to delete him from the return is to select *General; Client Information; Dependents* and delete (use the small “x” on the tab) the Fort tab near the top of the screen.

From the menu at the left, select *Income; Wages, Salaries, Tips (W-2); Wages.* Click on the upper left icon, to the left of New Tab, that looks like a sheet of paper. This takes you to the *Quick Entry: Wages, Salaries, Tips* screen. Enter the amounts for Dora’s wages and federal income tax withheld. The information entered is saved automatically.

From the menu at the top, select *File Return*. From the menu at the left, under *Print*, select *View/Print Return PDF.* Click the blue *View Return PDF* button. The return should open in a new tab. Review the return and then download it – remember where you save it. Close the PDF.

**Group 4, Problem 2B: Boxer, Abigail**

Sign in to your Intuit account and click *Tax Returns* icon on left margin. Then click *Create tax return* on the upper right. Click the [+] for *Add New* and select the *Individual (1040, 709)* button and fill out the information for Abigail. Email and phone numbers are not required but you may enter assumed data. Click on *Save* at the lower right. On the next screen *Client*, you may review the information you input, make any corrections necessary through the *Edit* button on the upper right, and once satisfied, click on *Save* at the lower right.

You have now landed on Abigail’s 1040 *Profile* page. Under the *Profile* tab, you may want to unselect the *Select for E-file* buttons that are selected by default in the software, but it is not required. From the tabs near the top, select *Input Return*. On the right side of the screen you will now see Details: *Client Information.* Scrolling down through the client information, see *Filing Status* and change filing status from *Single* (default) to *Head of household*.

Continuing to scroll down through the client information, enter Abby’s occupation and then towards the very bottom of the client information, find *Prepared by* and select 3 for *Self-Prepared*.

From the menu at the left, select *General; Dependents*, and on the right side of the screen, you will see *Details: Dependents*. Scrolling down through the *General Information,* enter the information you have for Helen. The information entered is saved automatically. You may leave *Earned Income Credit* and *Child Tax Credit* at *1=When applicable*. The software will automatically determine the proper credit for the dependent (see ProConnect Tip on p. 1-19 of ITF).

From the menu at the left, select *Income; Wages, Salaries, Tips (W-2).* This brings you to the *Details: Wages, Salaries, Tips (W-2)* input sheet on the right side of the screen*.* On this Details sheet, click on the upper left icon, to the left of *New Tab*, that looks like a sheet of paper. This takes you to the *Quick Entry: Wages, Salaries, Tips* screen. Enter the amounts for Abigail’s wages and federal income tax withheld. The information entered is saved automatically.

For the interest income, from the menu at the left, select *Income; Interest Income (1099-INT, 1099-OID).* For the taxable interest, enter the name of the payer and enter the amount for *Banks, S&L, etc.* For the tax-exempt interest, scroll down to No. 2 on the same screen, enter the name of the payer and enter the amount for *Total Municipal Bonds* (you may enter the information for in-state municipal bonds but it will have no effect since South Dakota does not have a state income tax). The information entered is saved automatically.

From the menu at the top, select *File Return*. From the menu at the left, under *Print*, select *View/Print Return PDF.* Click the blue *View Return PDF* button. The return should open in a new tab. Review the return and then download it – remember where you save it. Close the PDF.