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

We’ll be using Intuit’s ProConnect Tax Online to prepare federal income tax returns. We won’t be filing them 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 1: Hair, Beverly and Ken**

Sign into your Intuit account and from the Welcome screen, select *Tax Returns* in the lefthand margin. You will have landed on the Tax Returns 2019 page and you should select *Create tax return* on 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 Beverly. 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, 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 Beverly’s 1040 *Profile* page. You may unselect the *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*. 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 Beverly and the Spouse Information for Ken. Continue to scroll down through this page and toward the bottom, under *Miscellaneous Info,* find *Prepared by and* select 3 for *Self-Prepared*.

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 Beverly’s wages and federal income tax withheld. The information entered is saved automatically. There’s no need to enter her state income tax withheld, because we’re not preparing a state return, and the Hairs are not itemizing. It will not affect the return if you do.

While entering the wage information on the quick entry screen, a second line has likely popped up to allow the input of Ken’s W-2 information, If you are not on the quick entry screen, select the tab with the + sign at the top, to the right of *New Tab* for an additional tab to enter the second Form W-2 information. Scroll down to *Wages*. Check the box for *Spouse W-2*. Enter the amounts for Ken’s wages and federal income tax withheld.

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*. The information entered is saved automatically.

For the dividend income, from the menu at the left, select *Income (1099-DIV)*. Enter the name of the payer and enter the amount under *Dividend Income/Total Ordinary Dividends* and also under *Dividend Income/Qualified Dividends*.

To enter Beverly’s unemployment compensation, from the menu at the left, select *Income; Tax Refund, Unempl. Comp./1099-G*. Scroll down to the *Federal* section on the rightand under *Unemployment Compensation,* enter the amount as *Total received (1).*

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: Gomez, Ray and Maria**

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 see that the *Individual (1040/ 709)* button is selected by default and fill out the information for Ray. 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 Ray’s *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 to *Married filing jointly*. Next check the *Live With Spouse* box. Scroll down this page further and enter the *Occupation* for Ray and the Spouse Information for Maria.

Continue to scroll down toward the very bottom of the client information, find *Prepared by* and select 3 for *Self-Prepared*.

From the menu at the left, select *Income; Wages, Salaries, Tips (W-2); Wages.* 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 Ray’s wages and federal income tax withheld. The information entered is saved automatically.

While entering the wage information on the quick entry screen, a second line has likely popped up to allow the input of Maria’s W-2 information, If you are not on the quick entry screen, select the tab with the + sign at the top, to the right of *New Tab* for an additional tab to enter the second Form W-2 information. Scroll down to *Wages*. Check the box for *Spouse W-2*. Enter the amounts for Maria’s wages and federal income tax withheld.

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.* The information entered is saved automatically.

For the alimony, from the menu at the left, select *Deductions, Adjustments to Income*. Then select the *Less Common Scena*…tab near the top right. Click on the *Alimony Paid* box under Taxpayer and enter the ex-spouse’s information and amount paid for the year. The information entered is saved automatically.

To enter Maria’s lottery winnings, from the menu at the left, select *Income; Gambling Winnings/Losses (W-2G).* The default screen that pops up is typically the quick entry screen. Click *Losses/Misc Winnings* in the upper right corner. Enter the amount for *Winnings not reported on Form W-2G.*

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: Conch, Carl and Mary Duval**

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 Carl. 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 Carl and the Spouse Information for Mary. Continue to scroll down this page and toward the bottom, under *Miscellaneous Info* find *Prepared by* and select 3 for *Self-Prepared*.

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 Carl’s wages and federal income tax withheld. Be sure and enter the Box 12 and 14 information also. 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 dividend income, from the menu at the left, select *Income (1099-DIV)*. Enter the name of the payer and enter the amount under *Dividend Income/Total Ordinary Dividends* and also under *Dividend Income/Qualified Dividends*.

To enter Mary’s unemployment compensation, from the menu at the left, select *Income; Tax Refund, Unempl. Comp./1099-G*. Scroll down to the *Federal* section on the rightand under *Unemployment Compensation,* enter the amount as *Total received (1).* Be sure and enter the withholding also (Box 4).

For the alimony, from the menu at the left, select *Deductions, Adjustments to Income*. Then select the *Less Common Scena*…tab near the top right. Click on the *Alimony Paid* box under Taxpayer and enter the ex-spouse’s information and amount paid for the year. The information entered is saved automatically.

To enter Mary’s raffle winnings, from the menu at the left, select *Income; Gambling Winnings/Losses (W-2G).* The default screen that pops up is typically the quick entry screen. Click *Losses/Misc Winnings* in the upper right corner. Enter the amount for *Winnings not reported on Form W-2G.*

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.