



## TAX RETURN PREPARATION - ACC 341R

Fall 2011

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### **COURSE DESCRIPTION:**

This 1 credit course helps students learn to prepare federal and state tax returns. The student will be graded credit/no credit. A letter grade is not assigned for the work in this course.

### **COURSE RESOURCES:**

The Course Web Site is available through the Blackboard link at the UVU page for the course, through my web page at [www.balden.com](http://www.balden.com), or directly through the open.uvu.edu link. To prepare the tax returns you may use the any tax preparation software that is available to you, order a free copy of the previous season's Drake Tax Preparation software (2010) to prepare the returns on your own personal computer, or use the current year Drake Tax Preparation software (2010) installed on the server in the Woodbury Business building at UVU\*.

### **COURSE FEES:**

When you register for this online course, you are assessed the Distance Education Fee. The Distance Education Fee is used to cover costs of the computer systems and network which will be used during the semester to post the information for the class to the web and to submit your homework. Access to the business school computer systems is available through a separate access fee. It includes your access to the Drake Tax Preparation software for the current year and other software available in the computer labs in the Woodbury Business Building.

### **COURSE REQUIREMENTS AND PROCEDURES:**

In this course you will learn by doing. Each tax return information set contains detailed instructions to be used in preparing the tax returns. You should begin with simple returns and progress through more complex returns to teach you the logistics of preparing the tax returns using the Drake Software. You must accumulate 1,500 total points to receive credit for the class. You can accomplish that by preparing and submitting at least 15 separate complete tax returns. The information for the tax returns is provided at the course web site. Each full return is worth 100 points. A few single form exercises are available for fewer points. You may use the tax preparation software available at UVU, tax preparation software that you install on your own computer or software that is available through an employer or some other source. Some tax form exercises may be completed with forms from the IRS web site (Be sure to print them to pdf files, not save them.)

At least one return or two single forms should be submitted each week. The first fifteen returns are listed under the first 15 weeks on the course web site. The returns listed at the end of the course may be prepared at any time in place of the first 15. Lab times will be scheduled to assist you if you wish to prepare the returns on campus. Many of the returns have detailed instructions and sample solutions for you to follow. To receive all of the points, a correct complete return must be submitted.

Each submitted return must be complete and contain the required forms. The tax returns can, and often will, contain other forms besides the one required for the submission criteria. Each return

may only be submitted once. Besides the federal and state forms, each complete return must contain a cover page, a taxpayer transmittal letter, a bill for the preparation of the return and any necessary attachments. Your name must appear in each tax return submitted in the "in care of" area, in the preparer section, on the transmittal letter and on the bill. A sample solution return will be available for many of the returns so you can see what your return should look like when it is finished. Please compare your return with the solution before you submit it for credit.

Once you have prepared the form or return, print the results in PDF format and submit the pdf file at the course web site. To receive credit in this course, you must submit unique returns or forms that you have not previously submitted for credit in this course. If you submit more than one return to a link, the program will keep only the last item submitted and you will receive credit only for the last item submitted.

The Drake software CD has a tutorial that can help you learn to use the software. If you find a situation that you do not know how to handle, please email the instructor for assistance.

### **USING THE DRAKE TAX PREPARATION SOFTWARE ON CAMPUS AT UVU**

In order to use the Drake Tax Preparation software on campus in the labs in the Woodbury Business Building, you will need to e-mail the instructor to obtain a Prepare ID and password. You will also be assigned a unique preparer number to use in preparing the tax returns on campus. You will use this number in the Preparer # space on the Name/Address screen for tax returns prepared on campus. Using the preparer number ensures that your name will appear on the transmittal letter and the invoice in the completed return.

On campus please use your last name for the Taxpayer last name followed by a dash and the taxpayer name from the problem or put your name in the "in care of" section below the address. Also, to avoid duplication of social security numbers on the UVU system, assign each return problem a Social Security identifying number that starts with your three digit assigned preparer number, a two digit week number and a three digit number that you assign to the return followed by a zero. (eg. NNN WW ### 0). For example if your preparer number is 183 and you are working on your first individual return in week 4 you would use the Social Security Number 183-04-0010.

### **USING THE DRAKE TAX PREPARATION SOFTWARE ON YOUR COMPUTER**

When you install the Drake Solution Software on your own computer, you will need to set up the firm and preparer information for yourself under the setup drop-down menu link. Fill in as many of the items as you have information for and leave the others blank. After you look at a calculated return you may wish to make changes in the information in the setup screens so that it looks the way you would like.

When you enter your personal preparer information on your computer, the program will assign you a preparer number, most likely "1". This number will be used in the Preparer # space on the Name/Address screen. You will create your own Preparer ID and password.

## ASSIGNED PREPARER NUMBERS

The assigned preparer numbers for Fall semester are as follows:

### Fall 2011 user number assignments

Prep ID	NAME	Prep ID	NAME	Prep ID	NAME	Prep ID	NAME
8	Todd D Allen	178	Daniel W Dunn	256	Robert W Knight	227	Kristin E Price
156	Dane Anderson	252	Daniel K Eng	203	Russell J Lake	261	David T Przybyla
157	Aldo I Aragon	179	Logan J Ethington	204	Jose L Lara Castro	254	Kenneth B Roberts
158	Kimberlee Ann Ashby	180	Zachary W Eyre	205	Justin C Larsen	228	Whitney L Robison
159	Kyle B Barney	181	Amy Felix	206	Marci L Lawson	229	David R Sage
160	Danielle A Bate	182	Lori A Ferguson	207	Adonica I Limon	255	Zachary C Schramm
143	Johathan J Berrett	183	Daniel J Gardner	208	Shannon Lovell	230	Melissa R Schroeder
161	Lindsay M Bjarnson	247	Alicia A Garrett	257	Jonathan R Lowe	231	Latoya Shaw
162	Chelsey L Bleak	184	Kim R Gilbertsen	209	Brandon M Malan	232	Oleksandr Shelyakin
163	Ulma L Booth	185	Emigdio Gonzalez-Niquet	60	Natalia E Martinez	233	Sarah M Sherwood
164	Brennon S Bowen	186	Angela D Hadfield	210	Timothy D Mathews	234	Katelyn M Smith
253	Justin Seth Boyle	187	Amanda L Hall	211	Dan Mead	235	Jacqueline E Snow
254	Conny Ruth Brindley	251	Joshua L Hardin	212	Jose M Melendez	249	Roarke T Stone
255	Jacob C Brydson	188	Cory L Harker	213	Casey T Miller	250	Michael Y Tao
165	Ben D Buhler	189	Joshua K Haslam	214	Joshua S Mueller	236	John W Thomas
166	Keith W Burkhart	252	Micala D Hastings	215	Derek N Murray	87	Derek R Tuckett
167	Steven T Camargo	190	Joani R Hatch	258	Brandon S Murri	237	Matt T Wade
168	Andrew J Carter	191	Caitlin M Heiner	216	Valerie M Nagle	238	Colin P Walker
101	Marie D Carter	192	Sage R Hennen	217	Chad A Nelson	239	Haili M Walker
25	Mildret Casiano	42	Jason K Howell	67	Charles S Noble	240	Steven Wall
169	Francis T Cheung	193	Haley A Hughes	218	Farida Norris	241	Landon G Ward
251	Sung Ho Choi	194	Jamie L Hull	219	Kjera Nunez Rigotti	89	Jessica A Watterson
170	Lacee M Christopherson	195	Yasser Z Ibrahim	220	Michael W Oates	242	Nikki B Webster
262	James Chung	196	Jordan C Jensen	222	Tyler C Olsen	105	Monroe A Wells
171	Marci M Condie-Gunnell	197	Aaron B Johnson	69	Race Ostler	243	Ryan C Willardson
246	David W Cook	198	Amy Jo Johnson	223	Braden C Page	91	Loren Willes
172	Megan R Creer	199	Derek Johnson	224	Isaac V Painter	244	Ashley B Wilson
173	Tina M Daniels	200	Ethan A Johnson	259	Katharina L Parker	245	Joshua O Wilson
174	Carolyn Davis	103	Carrie L Jones	253	Casey R Patten	95	Colten R Winchester
175	Ariel A Day	49	Jacob C Jorgensen	225	David W Patterson	94	Matthew A York
176	Jordan K Dodson	201	Suraj P Kashyap	248	Meghan A Poll	260	Jiaqi You
177	Taylor H Duke	202	Michael S Kemp	226	Benjamin Z Powell		

**Please use these numbers when creating the SSN/EIN for a homework return and for the preparer number on returns prepared on campus using the Drake program on the business server. You should assign each return problem a Social Security identifying number that starts with your three digit assigned preparer number listed above, a two digit chapter number and a three digit number that you assign to the return, followed by a zero. (eg.**

**NNN CC ### 0). For example if your preparer number is 283 and you are working on your first individual return in chapter 4 you would use the Social Security Number 283-04-0010.**

**STUDENTS WITH DISABILITIES INFO:**

**If a student has, or believes they may have, any disability which may impair their ability to successfully complete this course, they should contact the UVSC Accessibility Services Department (room BU-146, extension 8747). Academic accommodations are granted for all students who have qualified, documented disabilities. Required accommodations are coordinated with the student and instructor by the Accessibility Services Department.**

**Note: This schedule is subject to change without notice. Changes will be posted to the web site.**

**Updated August 30, 2011**