



Income Tax Preparation - ACC 341R-X01

2010

Instructor: John A. Balden Office WB122

E-Mail - john.balden@uvu.edu Phone 863-8202

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 a link at the UVU page for the course, through my web page at www.balden.com, or directly through the open.uvu.edu link. To prepare the tax returns you may use the TaxCut software that comes with the tax course textbooks on your own personal computer, use any other tax preparation software that is available to you, order a free copy of the previous season's Drake Tax Preparation software (2009) to prepare the returns on your own personal computer, or use the current year Drake Tax Preparation software (2009) installed on the server in the Woodbury Business building at UVU*.

CLASS 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 also available through an 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 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 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. 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 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 Spring semester are as follows:

ID	Name	ID	Name	ID	Name	ID	Name
196	Todd Alder	216	Rachel Star Elder	237	Brandon Michael Malan	258	Fredrick Scott Shoell
96	McKenzie Aller	217	Griffin Jimenez Ellis	238	Bradyn Colby Meadors	259	Julie Smith
197	Jessica Arin Andra	218	Chad R Elmer	239	Rossy E Mijares	260	Shelia Ann Smith
198	Godofredo O Aurazo	219	Stephen Robert Elsey	240	Ashley Iris Miller	261	Rebekah Elizabeth South
199	Esteban Noe Avalue	220	Tod-Od Enkhbayar	241	Michael Gjanden Mitchell	262	Nick Laramie Stark
11	Tyler Michael Bell	221	Edwin Roger Eschler	242	Maritza Mercedes Monterrosa	80	Daniel M Stout
200	Lance Bertola	222	Lafieta Asisi Eyre	243	Justn Lee Morris	263	Abigail E Strait
201	Nicholas M Betts	223	Oscar David Gonzalez	244	Bradey Russell Mortensen	264	Michael Yoshinobu Tao
202	Izamar Ivone Bravo	224	Leann Gourley	245	Alison Mueller	265	Daniel R Tervort
203	Christy M Bray	225	Scott S Greenhalgh	246	Matthew Ross Newman	266	Dana Alan Thompson
204	Roger Garrett Brown	226	Dustin B Griffiths	247	Chris John Nibley	267	Abby N Tryon
20	Kody Ruben Burgess	227	Mitchell Francis Ham	248	Emma Lee Nichols	268	Tiffany Voorhees
205	Amos B Chin	228	Nate Scott Hansen	249	Natasha Nielson	269	Tyler K Wagner
206	Kathleen E Compton	229	Lindsey Rae Harper	64	Race Ostler	270	Steven Wall
207	Heather L Connell	230	Martha M Hawkes	250	Isaac Virgil Painter	271	Tracie C Watts
208	Zackary Corbett	231	Michael John Holmes	251	Heather Claire Park	272	Kevin C Westwood
209	Daniel O Court	232	Daniel I Hunt	252	Ryan H Payne	273	Jamie Louise Wharton
210	Elizabeth H Crawley	50	Kurt Legrande Hutson	67	Spencer John Perkinson	274	Alanna Megan Whearley
211	Ubon Datumma	169	Andrea Daniela Ibanez	253	Cheri Jean Primm	275	Regan Cole Whimpey
29	Cody Lynn Davies	51	Randall Richard Jones	254	David Walter Robinson	276	Eric Todd Wilding
212	Elizabeth L Dawson	233	Neal E Koffman	255	Janet Lynn Sampson	277	Charles Wayne Williams
213	Mandee Joe Dean	234	Emily J Lawrence	111	Kristy Golda Sandage	278	Melevesi Wolfgramm
214	Connie L Doty	235	Nathan P Lloyd	256	Bradley Allen Schmidt		Jorge Zuniga-Pedroza
215	David Francis Dupaix	236	Shannon Lovell	257	Derek Benjamin Schwartz		

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 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 283 and you are working on your first individual return in week 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 26, 2010