



TAX RETURN PREPARATION - ACC 341R

Spring 2012

Instructor: John A. Balden
E-Mail - john.balden@uvu.edu

Office WB122
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 the Canvas 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 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 (2011) 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 (one return each week). 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 should 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 2012 semester are as follows:

Spring 2012 user number assignments

Prep ID	NAME	Prep ID	NAME	Prep ID	NAME	Prep ID	NAME
5	Christy H Afu	44	Nathan E De La Cruz	148	Jacob C Jorgensen	111	Tamara Lynn Olsen
6	Daniel S Allen	45	Paulo D De Souza	77	Jerald Jeffrey Jurinak	112	Zachary Ike Olson
160	Telisa Ammon	46	Steve Gerald Dearing	155	David S Justice	113	Brett Alan Ovard
8	Brett C Andersen	47	Matthew A DeGriselles	78	Angela Katoa	157	Ryan H Payne
9	Janalee Anderson	48	Sonia Elsa Desposorio	79	Jake Kearney	115	Brandon K Peterson
10	Kevin N Anderson	158	Sarah A Dickey	80	Elizaveta A Kharchenko	116	Jonathan Robert Pitt
11	Michael Jake Angus	49	Mario Edson Dominguez	166	Ayisha King	117	Landon Wayne Porter
161	Jake R Avare	50	Mckinzie A Dorton	82	Adam M Lallas	118	Shanda Jean Pratt
12	Kimberlee Ann Ashby	51	Sandro Duarte	83	Clarence E Lancaster	119	Kristin E Price
13	Debra Jo Aubart	52	Matthew F Eastwood	167	Camren J Larsen	120	Alexander B Roberts
14	Paul Gregory Auman	53	Luis Enrique Echeverria	84	Mark T Lay	121	Kenneth B Roberts
15	Shaunalie Auman	151	Daniel K Eng	85	Jacob Lynn Layton	122	Tiffany Rodriguez
16	Kenneth P Avery	54	Leah Elizabeth Erickson	86	Joshua W Leighton	124	Dexter E Rowley
162	Joshua G Baker	56	Craig A Estep	87	Ashley Kyle Lewis	125	Kenneth E Schell
18	Marcos E Barrantes	57	Brittany Farrell	88	Ashley Dyan Lindsay	126	Judy J Scheurman
149	Deanne M Beavers	58	Sean Davis Frazer	89	Andrew spencer Lish	127	Tiffanie Shoell
19	Joseph Lehi Belliston	59	Jake B Fugal	90	Hung-Pei Liston	128	Sean T Smith
20	Marie Lynn Belliston	164	Blake J Gailey	168	Todd H Llewellyn	129	Jacqueline E Snow
22	Ulma Lisseth Booth	60	Yana V Galitsyna	92	Shannon Lovell	131	William F Tew
23	Bradley Ryan Boulton	61	Jeran Sean Gardner	93	Jonathan R Lowe	132	John Wesley Thomas
24	Roger Garrett Brown	63	Jeffrey Gary Goold	147	Michael Lund	133	Erin Thompson
163	Brett D Burbank	65	Calvin Clark Harris	94	Andrew Lyon	134	Benjamin S Thornton
25	Julie Burke	66	Adam Michael Harrison	95	Jessica D Mabunga	135	Nicholas John Trovato
150	Jonathan M Burrows	67	Joani Rae Hatch	96	Tanner M Mahoney	136	KaNeil Tucker
26	Gregory Caldwell	165	Sheldon D Hatch	97	Christopher R Massimini	137	Samuel J Turnbow
27	Alexander P Call	68	Sage Roe Hennen	98	Timothy D Mathews	138	Susanna Alissa Vaca
28	Max Kent Cannon	69	Diane E Hesson	99	Alexander M McIntosh	139	Ioana Maria Vidoni
30	Jaclyn E Carver	152	Cody R Homer	156	Aaron M McLaughlin	140	Francisco J Viteri
32	Tyler R Christiansen	70	Isabelle J Horrocks	101	Dan Mead	170	Brenan R Volpe
34	Ryan W Collins	71	Quinten Lawrence Hout	102	Ryan Joel Memmott	141	Haili Marie Walker
36	Donna Deane Connor	72	Chad Everett Hughes	103	Isabel Natlleli Mendez	142	Aidaly Watts
37	Irina Vasley Creviston	153	Yasser Z Ibrahim	104	Jonathan Mendez	159	Tylyn Weight
38	Elizabeth J Cruz	154	Jeshua J Jay	105	Spencer W Mortensen	143	Peter J Whitcomb
39	Heidi ann Dalton	74	Kyle David Jensen	169	Umair Munawar	144	Tayloe K White
40	Mikel Trent Davies	75	Parker Holt Jolley	106	Chad Andrew Nelson	145	Nelson Paul Whiting
42	Zachary B Davis	76	Daren Blake Jones	107	Christine Sue Nelson	146	Jeffrey Carl Wright
43	Ariel Atwood Day						

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 January 21, 2012