

Test Scenario 1 (NACTP Test 1)

Oklahoma Form: 511

*Taxpayer: EEEE ZZZZZZ
1040 EZ Way
Oklahoma City, OK 73110*

SSN: 400-00-5001 – ATS 400-00-5051 - PATS

W2: Oklahoma withholding = \$75

*Direct Deposit: Change to a valid routing number
Tinker Federal Credit Union
RTN 303085829*

Additional Information:

- Does not qualify for Form 538S. Taxpayer lives with a roommate; the total gross household income exceeds the \$20,000 income limit.
- No use tax is due.
- Check the box to allow OTC to speak to the tax preparer.

Final Result - Refund equals \$75 (Form 511, line 34).

NACTP

Test 1

This is a single taxpayer with 1 W2.

Forms: 1040EZ, W2 (1)

Taxpayer:

EEEE ZZZZZZ

1040 EZ Way

Wynot, NE 68792

SSN: 600-00-1001

DOB: 08/19/1988

Filing Status: Single

Direct Deposit:

Plains Credit Union

RTN 123456780

DAN 02135763

Checking Account

EEEE ZZZZZZ
1040 EZ WAY
WYNOT, NE 68792

Your social security number
600-00-1001

Spouse's social security number

▲ Make sure the SSN(s) above are correct.

Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.
 You Spouse

Foreign country name Foreign province/county Foreign postal code

Income

1 Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W-2. Attach your Form(s) W-2. **1 2,200.**

2 Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ. **2**

3 Unemployment compensation and Alaska Permanent Fund dividends (see instructions). **3**

4 Add lines 1, 2, and 3. This is your **adjusted gross income**. **4 2,200.**

5 If someone can claim you (or your spouse if a joint return) as a dependent, check the applicable box(es) below and enter the amount from the worksheet on page 2.
 You Spouse
If no one can claim you (or your spouse if a joint return), enter \$9,500 if **single**; \$19,000 if **married filing jointly**. See page 2 for explanation. **5 9,750.**

6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter - 0- . This is your **taxable income**. **6 0.**

Payments, Credits, and Tax

7 Federal income tax withheld from Form(s) W-2 and 1099. **7 400.**

8a **Earned income credit (EIC)** (see instructions). **NO** **8a**

b Nontaxable combat pay election. **8b**

9 Add lines 7 and 8a. These are your **total payments and credits**. **9 400.**

10 **Tax**. Use the amount on **line 6 above** to find your tax in the tax table in the instructions. Then, enter the tax from the table on this line. **10**

Refund
Have it directly deposited! See instructions and fill in 11b, 11c, and 11d or Form 8888.

11a If line 9 is larger than line 10, subtract line 10 from line 9. This is your **refund**. If Form 8888 is attached, check here **11a 400.**

b Routing number **123456780** c Type: Checking Savings

d Account number **02135763**

Amount You Owe

12 If line 10 is larger than line 9, subtract line 9 from line 10. This is the **amount you owe**. For details on how to pay, see instructions. **12**

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? Yes. Complete below. No

Designee's name Phone no. Personal ID number (PIN)

Sign Here

Under penalties of perjury, I declare that I have examined this return and, to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.

Your signature: **- For Information Only -** Date: Your occupation: **CLERK** Daytime phone number:

Spouse's signature. If a joint return, **both** must sign. Date: Spouse's occupation: If the IRS sent you an ID Protection PIN, enter it here (see inst.):

----- Do Not File -----

Paid Preparer Use Only

Print/Type preparer's name: **MADHUR TAXPRO** Preparer's signature: Date: **09/17/2012** Check if self-employed PTIN: **P41111111**

Firm's name: **H AND R BLOCK** Firm's EIN: **44-0607856**

Firm's address: **DUBLIN, OH 43017** Phone no.: **(614) 659-1158**