Replace Steps 37 etc. with the following:

Step 37 Source: Notes 🡺 TWO Screen:

Karl and Carmen had Medicare all year.

Kara had no health insurance from January through March while she was unemployed. Your local ACA expert says that Kara did not qualify for any exemption during this period. She had health insurance through her employer from April to December.

Kendra and Dave had insurance for January through June from a Marketplace policy. They elected to not take any advance of the premium tax credit relating to this policy. During July and August they had no health insurance. From September to December they were both covered through Kara’s employer.

 

**Reference**: 4012 ACA Tab

**Reference**: ACA TaxWise Procedures (TY2014 version)

Step 37a Source: Notes 🡺 TWO Screen: 1040 ACA Wkt

[see Notes above]

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| **Refund Monitor** |
| **AGI** | **Refund** | **NJ 39** | **NJ 56/66** | **Notes** |
| 78,650 | 4,974 | 18,996 | 2,207 | Hint: Follow Step 3 of ACA TaxWise Procedures |

Step 37b Source: Notes 🡺 TWO Screen: 8965

[see Notes above]

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| **Refund Monitor** |
| **AGI** | **Refund** | **NJ 39** | **NJ 56/66** | **Notes** |
| 78,650 | 4,974 | 18,996 | 2,207 | Hint: Follow Step 4 of ACA TaxWise Procedures |

Step 37c Source: Notes 🡺 TWO Screen: 1040 ACA Wkt

[see Notes above]

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| **Refund Monitor** |
| **AGI** | **Refund** | **NJ 39** | **NJ 56/66** | **Notes** |
| 78,650 | 4,830 | 18,996 | 2,207 | Hint: Follow Step 5 of ACA TaxWise ProceduresCheck: Line 14 = 144 |

Step 37d Source: Notes 🡺 TWO Screen: 8962

[see Notes above]

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| **Refund Monitor** |
| **AGI** | **Refund** | **NJ 39** | **NJ 56/66** | **Notes** |
| 78,650 | 5,346 | 18,996 | 2,207 | Hint: Follow Step 6 of ACA TaxWise ProceduresCheck: Line 26 = 516 |

Step 37e Source: Notes 🡺 TWO Screen: A Detail

[see Notes above]

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| --- |
| **Refund Monitor** |
| **AGI** | **Refund** | **NJ 39** | **NJ 56/66** | **Notes** |
| 78,650 | 5,804 | 15,912 | 2,250 | Hint: Follow Step 6 of ACA TaxWise ProceduresCheck: Medical Expenses Total = 15,107 |

Step 38 Source: Notes 🡺 TWO Screen: Diagnostics

Run Diagnostics (and Create e-File) – Resolve any issues (and don’t forget to celebrate finishing the Kent problem!!)

For a client return, the next step would be Quality Review…