

## Summary of 2009 TC-40 Participants Acceptance Testing Scenario's

Some of the federal schedules used on the Scenario's are not available on MeF. These are identified by the comment "(not available on MeF)". Make adjustments to the federal return and/or schedules so the federal submission can be accepted and the FAGI amount remains the same.

Some of the state data is not required for JELF but is provided for MeF submissions. These are identified by the comment "(MeF Only)".

### SCENARIO 8

400-00-5208 Derek D                      Davis  
Single Filer

1040EZ    U.S. Individual Income Tax Return (not available on MeF)

TC-40    Utah Individual Income Tax Return  
TC-40W    Utah Withholding Tax Schedule

40901

9998

2009 TC-40

Fiscal Year

Form 8886

Utah State Income Tax Dollars Fund Education

Amended Return

Utah Individual Income Tax Return

X if deceased

Your Soc. Sec. No. 400005208

DEREK D

DAVIS

Spouse's SSN

4907 PIONEER DR

CEDAR CITY

UT 847209694

1 Filing Status - enter code		2 Exemptions - enter number		3 Election Campaign Fund - enter code	
1 = Single	• 1	a 1 Yourself	} from federal return	C = Constitution	Yourself Spouse
2 = Married filing jointly		b 0 Spouse		D = Democratic	• L •
3 = Married filing separately		c 0 Dependents		L = Libertarian	
4 = Head of household		d 1 Total exemptions (add a through c)		R = Republican	Does not increase tax or reduce refund
5 = Qualifying widow(er)				N = No contribution	
4	Federal adjusted gross income from federal return			• 4	28933
5	Additions to income from TC-40A, Part 1 (attach TC-40A)			• 5	0
6	Total income (add lines 4 and 5)			6	28933
7	Deductions from income from TC-40A, Part 2 (attach TC-40A)			• 7	0
8	Utah taxable income (subtract line 7 from line 6 - if less than zero, enter "0")			• 8	28933
9	Tax calculation - multiply line 8 by 5% (.05)			• 9	1447
10	Multiply \$2,738 by line 2d above (if line 4 over \$125,100, see instructions)	• 10	2738		
11	Enter your federal standard or itemized deductions	• 11	5700		
12	Add lines 10 and 11	12	8438		
13	State income tax deducted on federal Schedule A, line 5	• 13	0	•	Check box and enter "0" on line 13 if sales tax was deducted on fed. Sch. A, line 5
14	Subtract line 13 from line 12	14	8438		
15	Multiply line 14 by 6% (.06)	• 15	506		
16	Enter \$12,511 if single or MFS, \$18,767 if HofH, \$25,022 if MFJ or QW	• 16	12511		
17	Subtract line 16 from line 8 (if less than zero, enter "0")	17	16422		
18	Multiply line 17 by 1.3% (.013)	• 18	213		
19	Taxpayer tax credit (subtract line 18 from line 15 - if less than zero, enter "0")	• 19		• 19	293
20	Enter "X" if you are a qualified exempt taxpayer (complete worksheet)	• 20			
21	Utah income tax (subtract line 19 from line 9 - if less than zero, enter "0")	• 21		• 21	1154
22	Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A)	• 22		• 22	0
23	Subtract line 22 from line 21 (if less than zero, enter "0")	23		23	1154

Last name **DAVIS**

SSN **400005208**

2 4	Enter tax (full-year resident enter tax from line 23; non or part-year resident enter tax from TC-40B line 35)	• 2 4	1154
2 5	Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A)	• 2 5	0
2 6	Subtract line 25 from line 24 (if less than zero, enter "0")	2 6	1154
2 7	Contributions - add lines 27a through 27d and enter total on line 27		
	<b>Code Description Code Amount Sch Dist Code</b>		
0 1	Utah Nongame Wildlife Fund • 2 7 a 03 6		
0 2	Pamela Atkinson Homeless Trust Fund • 2 7 b		
0 3	Kurt Oscarson Children's Organ Transplant Fund • 2 7 c		
0 5	School District & Nonprofit School District Foundation • 2 7 d 2 7 6		
0 9	Cat & Dog Community Spay and Neuter Program		
2 8	AMENDED RETURN ONLY - previous refund	• 2 8	0
2 9	Recapture of low-income housing credit	• 2 9	0
3 0	Utah use tax	• 3 0	0
3 1	<b>Total tax, use tax and additions to tax</b> (add lines 26 through 30)	3 1	1160
3 2	Utah tax withheld from TC-40W, Part 1 (attach TC-40W)	• 3 2	1550
3 3	Credit for Utah income taxes prepaid	• 3 3	0
3 4	Pass-through entity withholding tax from TC-40W, Part 3 (attach TC-40W)	• 3 4	0
3 5	Mineral production withholding tax from TC-40W, Part 2 (attach TC-40W)	• 3 5	0
3 6	AMENDED RETURN ONLY - previous payments	• 3 6	0
3 7	Refundable credits from TC-40A, Part 5 (attach TC-40A)	• 3 7	0
3 8	<b>Total withholding and refundable credits</b> (add lines 32 through 37)	3 8	1550
3 9	<b>Tax Due</b> - if line 31 is greater than line 38, subtract line 38 from line 31	<b>TAX DUE</b> • 3 9	0
4 0	Penalty and interest 4 0	0	
4 1	<b>Pay this amount</b> (add lines 39 and 40)	• 4 1	0
4 2	<b>Refund</b> - if line 38 is greater than line 31, subtract line 31 from line 38	<b>REFUND</b> • 4 2	390
4 3	Enter the amount of refund you want applied to your 2010 taxes	• 4 3	
4 4	<b>DIRECT DEPOSIT YOUR REFUND</b> - provide account information		checking savings
	• Routing number • Account number	Acct type	• •
	Check box if refund will go to an account outside the United States (see instructions)	•	
4 5	To deposit total refund to your Utah Educational Savings Plan account(s), enter "X" (see instructions)	• 4 5	

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules reflect my true tax status.

SIGN Your signature Date Spouse's signature Date

Third Party Designee	Name of designee (if any) you authorize to discuss this return	Designee's telephone number	Designee PIN	•
Paid Preparer's Section	Preparer's signature	Date	Preparer's telephone number	Preparer's SSN/PTIN
	Firm's name and address			Preparer's EIN

Do not send your W-2s or 1099s with your return. Instead, enter W-2 or 1099 information below, only if there is Utah withholding on the form. Use additional forms TC-40W, Part 1, if you have more than four W-2s and/or 1099s.

Line Explanations:	
1 Employer/payer ID number from W-2 box "b" or 1099 2 Utah withholding ID number from W-2 box "15" or 1099 3 Employer/payer name and address from W-2 box "c" or 1099 4 Enter "X" if reporting Utah withholding from form 1099 5 Employee's Social Security number from W-2 box "a" or 1099 6 Utah wages/income from W-2 box "16" or 1099 7 Utah withholding tax on W-2 or 1099	
1 631234599	1
2 86420975002WTH	2
3 UCAN MAKE AMINT 21 STARLIGHT CIR STARKVILLE, MS 39759	3
4	4
5 400005208	5
6 28800	6
7 1550	7
1	1
2	2
3	3
4	4
5	5
6	6
7	7

Enter total Utah withholding tax from all lines 7. 1550  
Enter this total on form TC-40, page 2, line 32.

