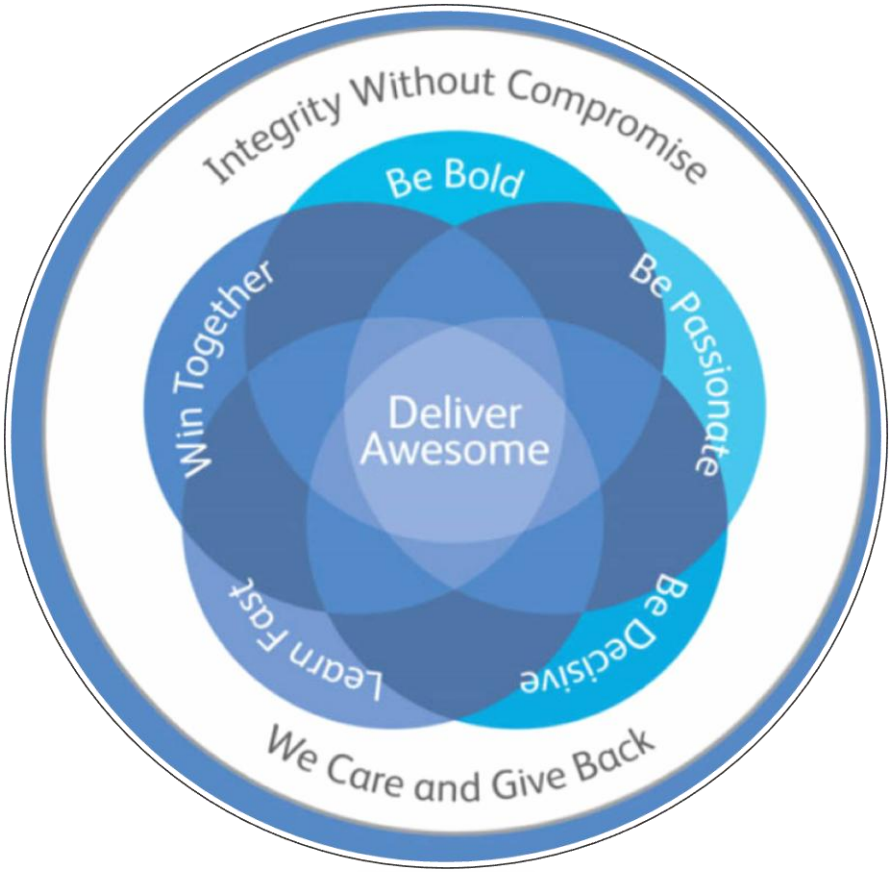
Government Forms Specialist Training Instructions

These instructions will teach you how to update government forms and build them into the Proseries and Lacerte products.

intuit

These instructions will help you learn to successfully update forms with the utmost quality. Your commitment to quality work supports Intuit's commitment to delight customers.



Intuit’s Lacerte and Proseries products are valuable and life-changing tools for the tax accountants who use them daily. Your commitment to excellence is vital to keeping the product carefully updated and increasing our customer’s delight.

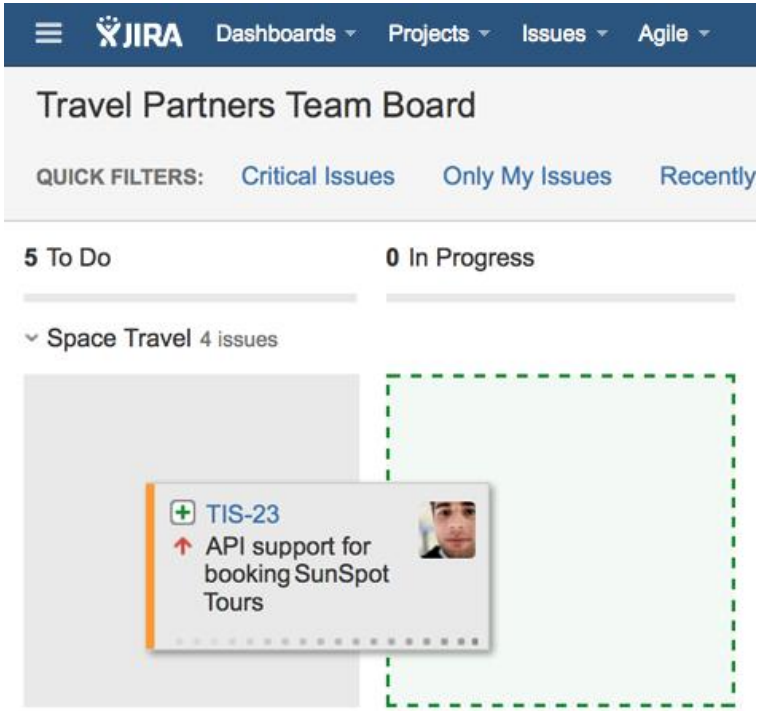
Tools

You will use many different tools to complete the form update process. Each tool is important to the process; follow the instructions below carefully to avoid skipping a step. If you are unsure about a step, ask your mentor before proceeding.

1. Claim the work

JIRA is the project management board; it keeps track of assignments and shows what everyone on the team is working on

JIRA board-Assign yourself a story



- Drag the top story from the “To Do” column into the “Pending” column. The story will automatically be assigned to you.
- Write down the form name and check for any comments in the description section.

EAP 6 PrISM

Form update records are kept here; Claim record to take ownership

- Select team # and “production” from the drop-down menu on right (ex: Team 3 Production)
- Select correct formset in the menu bar on right (ex: DEF for Delaware Fiduciary)
- Choose record from list in the main screen. Look for form name.
- Click on record to claim it.
- Write down file numbers associated with the form(Lacerte and Proseries) (ex: Proseries=CTCA0701; Lacerte=CF5CT6
- Click “save record” at bottom of page

Take Notes

Take notes in the Prism record to record the changes you make to the file.
Do not write down everything; only what the TAPs need to know.

For example:
“General graphic changes” indicates changes made throughout the form
“Minor text changes” indicates few text changes.
Call out dollar amount changes, line reference changes, and anything else the TAPs would need to know about for the calc’s.
Make note of:
Any major change: added pages, deleted pages, redesign, etc.

Notes can also be taken in notepad. This is especially useful for multi-file forms.

Paste these notes into Perforce and JIRA also.

Perforce is the file “library”

Check out the files

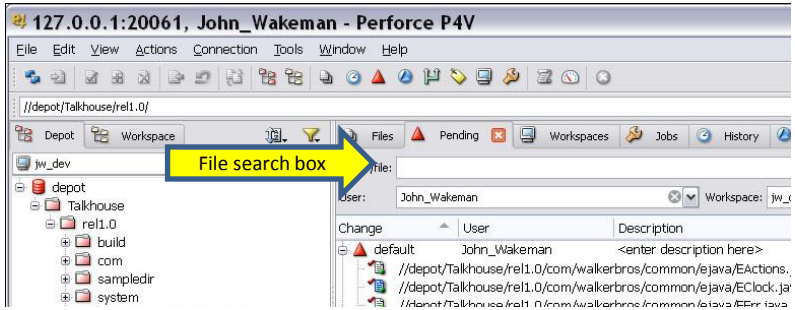


Figure 1

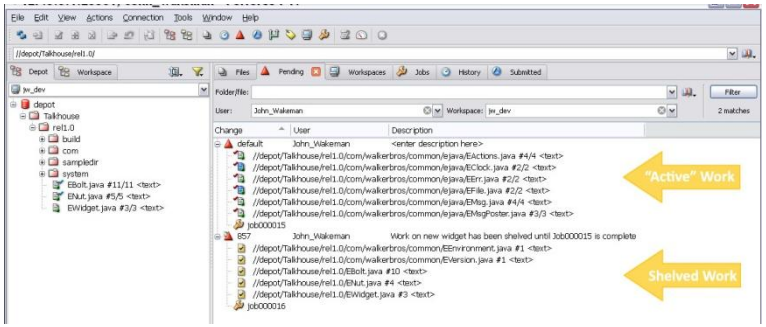


Figure 2

In Perforce 1667: Find file

- Go to “files” tab
- Enter Proseries file name from Prism into file search box. (See figure 1)
- Right-click to select all files in main window (See figure 2)
- (Ctrl+E) to check out selected files

Check out the files in Perforce 4000

Skip this step if it is a Lacerte only or an indiv file

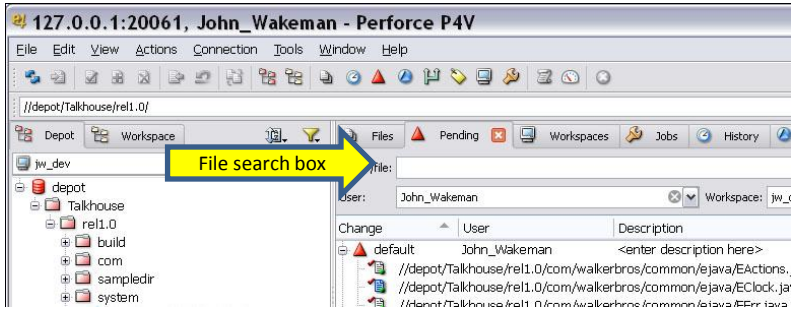


Figure 3

- In Perforce 4000: Find file
  Go to “files” tab
- Enter file name into file search box.
  (See figure 3)

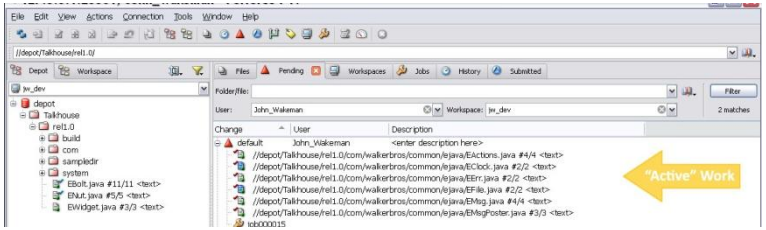


Figure 4

- Right-click to select .ptform and .f2p files in main window
  (See figure 4)
- **Important: Do not check out any other file formats. Do not check out filenames with an indiv or fiduc identifier.**

- (Ctrl+E) to check out selected files

2. Compare forms to find changes

Compare the most recent version of form with the current version of form. (ex: last year's final to this year's draft)

Locate government PDFs in current year's folder on J drive. (ex: ty15/forms and approvals/connecticut/fid/formname)

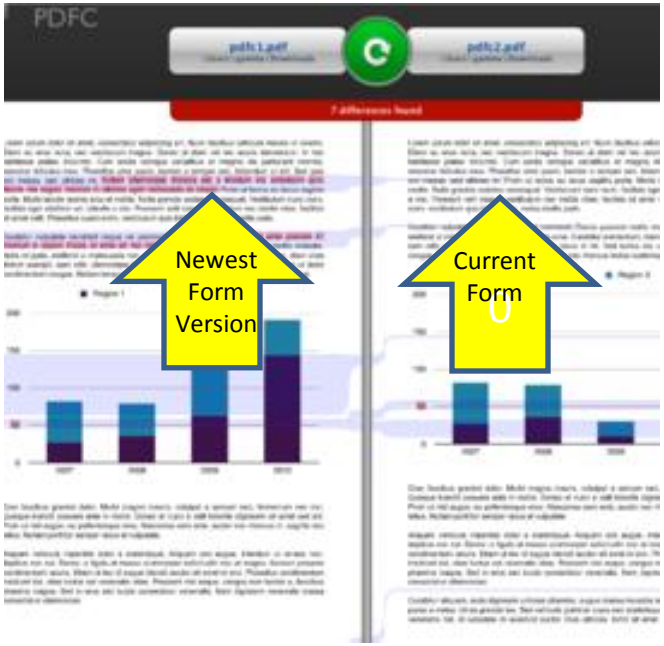


Figure 5

- Open PDFC
- Drag current version of government PDF onto right side of compare tool.
- Drag most recent version of government PDF onto left side of compare tool. (See Figure 5)
- Click "compare"
- Check generated comparison to view changes.

Watermarks

The government form may have a watermark that hinders the comparison process. If this occurs, remove the watermark using Foxit and then proceed with the comparison. See <u>watermark removal process</u>

For Privacy Notice, get form FTB 1131.

California Nonresident or Part-Year Resident Income Tax Return 2009 — **Short Form** — FORM **540NR** C1 Side 1

Your first name | Initial | Last name | Your SSN or ITIN

If joint return, spouse's/RDP's first name | Initial | Last name | Spouse's/RDP's SSN or ITIN

Address (number and street, PO Box, or PMB no.) | Apt. no./Ste. no.

City (If you have a foreign address, see page 9) | State | ZIP Code

P AC A R RP

Prior Name — If you filed your 2008 tax return under a different last name, write the last name only from the 2008 return. ● Taxpayer ● Spouse/RDP

Filing Status
1 ○ Single
2 ○ Married/RDP filing jointly. (see page 3)
4 ○ Head of household (with qualifying person). (see page 3)
5 ○ Qualifying widow(er) with dependent child. Enter year spouse/RDP died _____.
If your California filing status is different from your federal filing status, fill in the circle here ● ○

Residency
○ State of residence: Yourself _____ Spouse/RDP _____
○ Dates of California residency: Yourself from _____ to _____ Spouse/RDP from _____ to _____
○ State or country of domicile: Yourself _____ Spouse/RDP _____

6 If someone can claim you (or your spouse/RDP) as a dependent, fill in the circle (see page 9) ● 6 ○

Exemptions
▶ For line 7, line 8, and line 10: Multiply the amount you enter in the box by the pre-printed dollar amount for that line. **Whole dollars only**
7 **Personal:** If you filled in 1 or 4 above, enter 1 in the box. If you filled in 2 or 5, enter 2 in the box. If you filled in the circle on line 6, see page 9 . . . 7 ☐ X $98 = $ _____
8 **Blind:** If you (or your spouse/RDP) are visually impaired, enter 1; if both are visually impaired, enter 2 . . . 8 ☐ X $98 = $ _____
10 **Dependents:** Enter name and relationship. **Do not include yourself or your spouse/RDP.** _____
Total dependent exemptions . . . ● 10 ☐ X $98 = $ _____
11 **Exemption amount:** Add line 7 through line 10 . . . 11 $ _____

Total Taxable Income
12 Total California wages from your Form(s) W-2, box 16 or CA Sch W-2, line 3 . . . ● 12 _____ 00
13 Enter federal adjusted gross income from Form 1040, line 37; Form 1040A, line 21; Form 1040EZ, line 4; Form 1040NR, line 35; or Form 1040NR-EZ, line 10 . . . 13 _____ 00
If the amount on line 13 is more than $100,000, stop here and use Long Form 540NR.
14 Unemployment compensation and military pay adjustment. (see page 9) . . . ● 14 _____ 00
17 Adjusted gross income from all sources. Subtract line 14 from line 13 . . . ● 17 _____ 00
18 **Standard deduction** for your filing status. If you filled in the circle on line 6, see page 10.
• Single . . . $3,637
• Married/RDP filing jointly, Head of household, or Qualifying widow(er) . . . $7,274 . . . ● 18 _____ 00
19 Subtract line 18 from line 17. This is your **total taxable income**. If less than zero, enter -0- . . . 19 _____ 00

California Taxable Income
31 Tax on the amount shown on line 19 . . . ● 31 _____ 00
32 CA adjusted gross income. Add wages from line 12 and California taxable interest (Form 1099, box 1). Military servicemembers see line 14 instructions, page 9 . . . ● 32 _____ 00
33 CA Standard Deduction Percentage. Divide line 32 by line 17. If more than 1, enter 1.0000 . . . 33 _____
34 CA Prorated Standard Deduction. Multiply line 18 by line 33 . . . 34 _____ 00
35 CA Taxable Income. Subtract line 34 from line 32. If less than zero, enter -0- . . . ● 35 _____ 00
36 CA Tax Rate. Divide line 31 by line 19 . . . 36 _____
37 CA Tax Before Exemption Credits. Multiply line 35 by line 36 . . . 37 _____ 00
38 CA Exemption Credit Percentage. Divide line 35 by line 19. If more than 1, enter 1.0000 . . . 38 _____
39 CA Prorated Exemption Credits. Multiply line 11 by line 38 . . . 39 _____ 00
42 CA Regular Tax Before Credits. Subtract line 39 from line 37. If less than zero, enter -0- . . . ● 42 _____ 00

3141093

DRAFT as of 09/10/2009 DO NOT FILE

3. Update form in Livecycle Designer

LC updates files for the Lacerte product
Make the changes to match Intuit file to government form.

- Update the year in the GTI filename
- In the “file” tab, click “form properties”
  In the pop-up box, change the year digit in the filename
  Ex: cf5ffa→ cf6ffa

  Make changes to form using the comparison as a guide.
- See <u>editing in LCD</u>

- Change rev date at bottom to current date.
  Ex: ctca0701 02/23/16
- Don’t change state’s rev date; it must match their form.

- Check for accuracy

Check for accuracy

After editing the document in LCD, check for accuracy:

1.

   Save changes in LCD

2.

   PDF converter- Select the correct file name in the window. Click "convert"

3.

   GTI viewer-select the correct formset folder; select the filename. Click "File" tab at top of screen; choose "print PDF"

4.

   The file will open in Adobe Acrobat. View your changes here.
   Do not view your changes in GTI view
   Adobe Acrobat must be used to accurately view edits

   "Print PDF"; view. Save file as "Printing GTI".

5.

   PDFC with newest form version. Compare "Printing GTI" file and the government form to verify accuracy

Proofread and check quality

Attention to detail is extremely important in this step. This is the graphic interface that our customers will use in the product. Help eliminate technical debt!

Check most recent comparison for accuracy.

If errors are found, make changes and repeat steps 1-5

Repeat until there are no errors.

Check graphic quality:

- Lines are correct (no nubs or missing lines)
- Alignment is correct throughout
- Leaders are aligned properly
- Dummy data lines up with hard-coded text
- Graphic elements match government form: lines, boxes, etc.

Save changes, convert, and print on paper for last visual check

Move on to the next step only after you have verified your work for accuracy and quality.

4. Update form in Primary Tool

Primary Tool updates the Proseries product. Primary Tool files do not need to resemble government form.

- Update for content; check with your mentor for specifics
- Make updates in Primary Tool. <u>See editing in PT.</u>
- Print PDF of image. Click “File” tab→ select “Print” from drop-down menu → select “Print PDF” from available choices. Save as “Print Image”
- PDFC Print Image file with government form

4. Update form in Primary Tool cont'd.

Remember PT files do not need to match government form.

- Proofread and check quality same as with LC file
- Content should be 100% accurate
- There may be differences due to PT standards
- Check Tab order, fix if necessary
- Update rev date at bottom of file if you make any changes
- Alt+FPF to make sure all fields are mapping correctly
  If they are not mapping correctly, alert your mentor.

5. Check in files

Perforce 1667 “mark for add” all of the newly generated files.

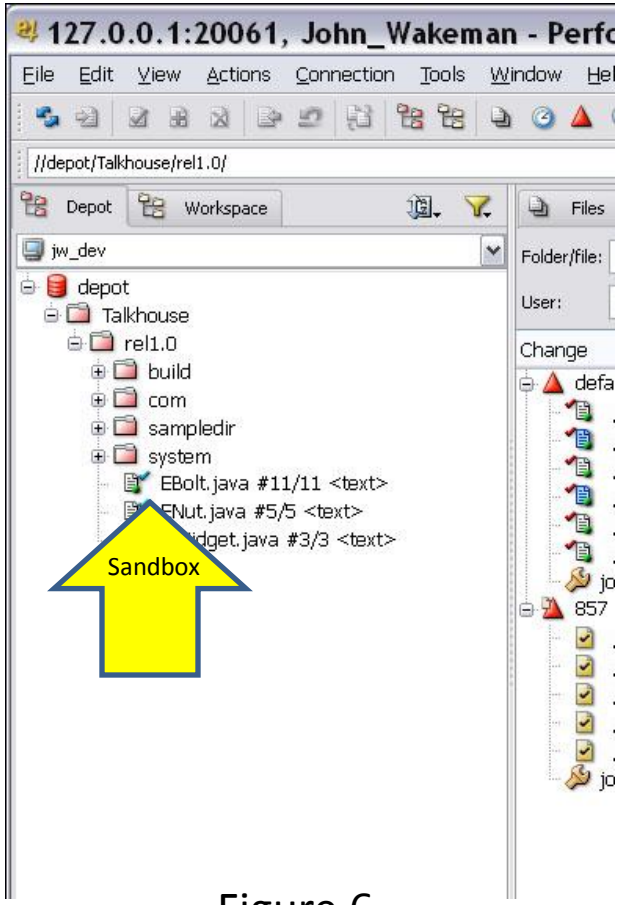


Figure 6

Look in sandbox on left side of screen. See figure 6.

Make sure you are in the folder that you are currently working in. New files will have a white notepad icon next to them.

- Select all files with this icon
- Right-click
- Select the “mark for add” option from the pop-up menu

They will now appear in the main section of the screen with the other checked out files

5. Check in files cont'd

Perforce 1667: Submit files.

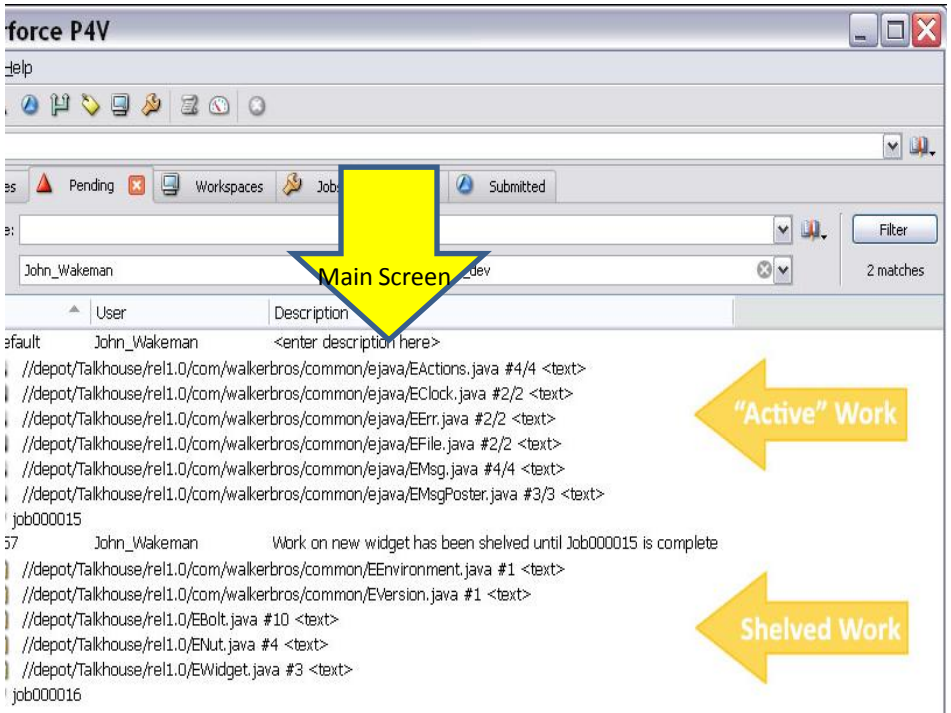


Figure 7

In the main screen,
(See figure 7), Select all files to be submitted.

- Right-click on selected files
- Select "Submit" from pop-up menu
- Paste notes from Prism into dialog box
- Click "Submit"

The files will are now returned to the sandbox

5. Check in files cont'd

Perforce 1667: Merge/Integrate files.

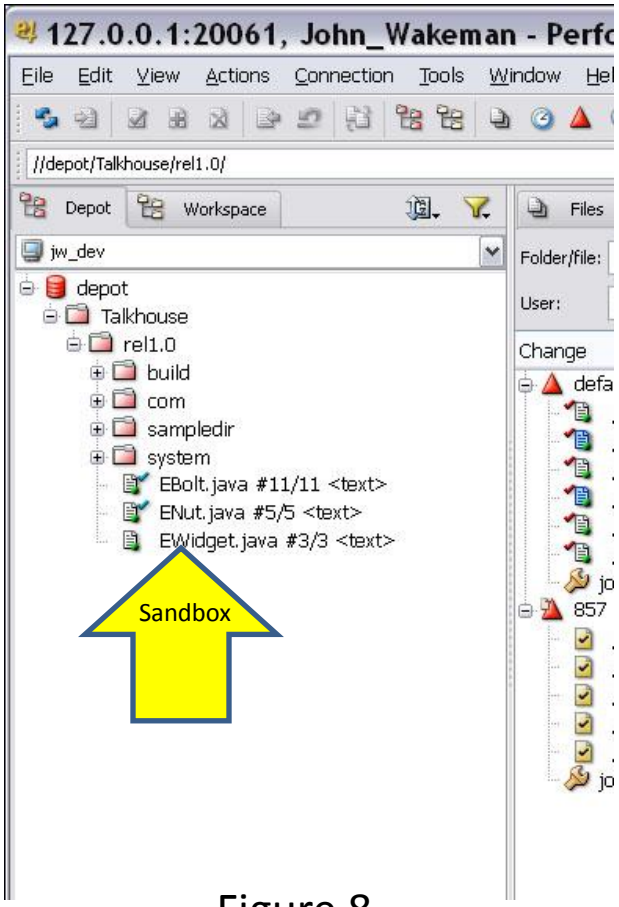


Figure 8

In the sandbox screen,
(See figure 8), Select all files that were submitted.

- **Be sure to select all of the recently submitted files**
- Right-click selected files
- Choose Merge/Integrate from pop-up menu
- Paste notes from Prism into dialog box
- Click "Merge"

The files have now entered production.

5. Check in files cont'd

Jenkins: Build files into production.

- From Jenkins: Click "build"
- Wait for a successful build message

Don't skip this step. If you don't get a successful build (green), DO NOT go to the next step. Tell your mentor immediately.

After a successful build has been verified, Run Robin's Tool.

5. Check in files cont'd

Robin's Tool: Deliver .ftp from Perforce 1667 to Perforce 4000

In the dialog box:

- Type in file name to be delivered
- Click "find file in workspace"

Once the file is found,

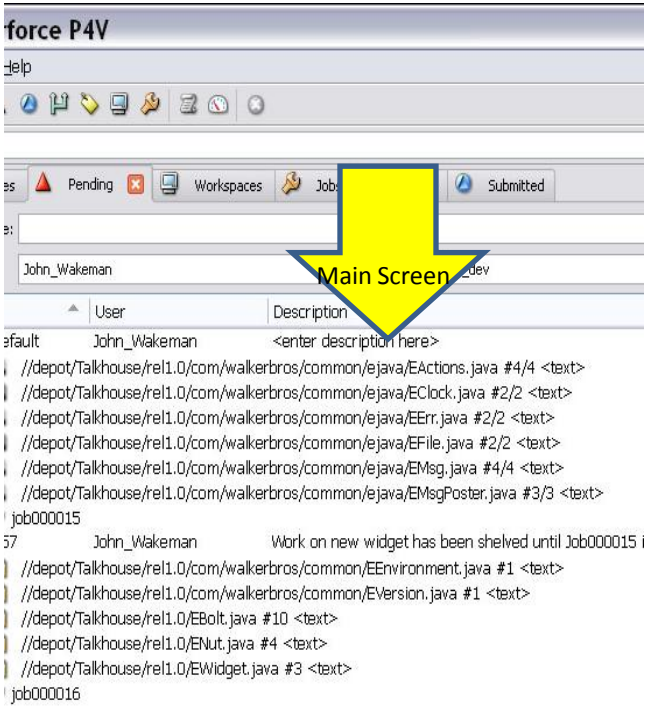
- Click "Deliver"

When the "success" box pops up, the file has been delivered.

Repeat process for each file if there is more than one

5. Check in files cont'd

Perforce 4000: Submit files in Perforce 4000



This is the last step of the file delivery process. In the main screen:

- Select files to be submitted
- Right-click on selected files
- Choose "submit" from pop-up menu
- Paste notes from Prism into dialog box
- Select "submit"

You are done with the files.

6. Mark work as complete

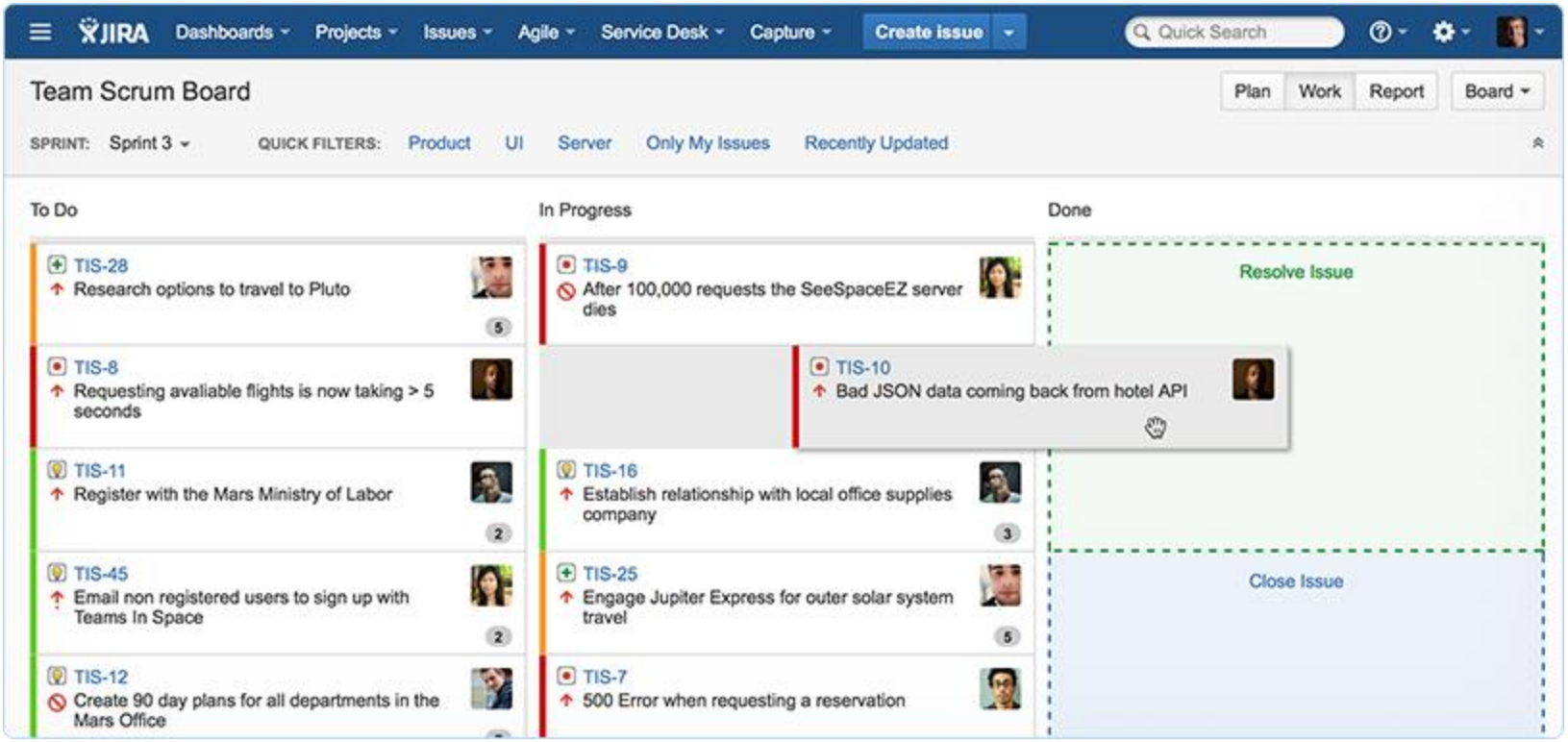
Prism: Turn in work record

- Paste notes into “Description” section if they are not already there
- Check appropriate boxes to indicate changes made to file and the complexity level of the work
- Click “submit”

6. Mark work as complete

JIRA: Mark work as “Done”

- Paste Prism notes into “Description” section of story card
- Move card into “Done” column



7. Definition of Done

You are done when:

- All files are checked back into Perforce 1667 and 4000
- Notes are pasted into JIRA story card
- Prism records have been submitted
- JIRA story card has been moved into “Done” column

Congratulations! Now you can pick up your next assignment.