

Donald Doe's Profile: California

Use the following information at to complete the tax return for our fictional friend, Donald Doe.

To create his account, use:

- Email: [AnyName]@fakemail.com
- Password: [make your own]



Snapshot: Donald is a divorced dad who has full custody of his one son, David. He works at a local car repair garage. David is in daycare. David's mom does not claim him as a dependent.

Donald's Personal Information

- Address: 5212 Lemon Hill Avenue, San Diego, CA, 92108
- Date of Birth: 07/01/1980
- SS# 400-34-2298
- Phone number: (858) 555-1234
- Occupation: mechanic
- Marital Status: divorced for 2 years
- Dependents living full time with him: 1
- Filing Status: head of household
- Home: he rents his home
- Citizenship: he and David are both US citizens who lived in CA the entire year. Donald did not serve in the military
- Donald did not pay for college, vocational school, or have student loans
- San Diego is in Gaston County, CA
- Answer "No" to any CA specific questions

His Child, David:

David Doe is Donald's son; Donald has full custody.

- David's birthday is 09/23/2013
- David's Social Security number is 400-43-9800
- David's mom does not plan to claim him as a dependent

Day Care:92108

- Donald paid \$2,200 in child care services last year so he could work:
- **Happy Day Care Center,**
 - Employer Identification Number (EIN) # is 13-1234567
 - Paid \$2,200.00
 - Address: 5300 Lemon Hill Avenue, San Diego, CA, 92108, (858)555-5678

Health Care:

- Donald purchased health insurance through **Healthcare.gov** for himself and David and had it for the whole year.
- He received a 1095-A form for the year

Donald Doe's W-2: CA

22222	Void <input type="checkbox"/>	a Employee's social security number 400-34-2298	For Official Use Only ▶ OMB No. 1545-0008		
b Employer identification number (EIN) 13-1234123		1 Wages, tips, other compensation 20,100.00	2 Federal income tax withheld 310.00		
c Employer's name, address, and ZIP code The Local Garage 545 Engine Road San Diego, CA, 92108		3 Social security wages 20,100.00	4 Social security tax withheld 1,246.00		
		5 Medicare wages and tips 20,100.00	6 Medicare tax withheld 291.45		
		7 Social security tips	8 Allocated tips		
d Control number		9	10 Dependent care benefits		
e Employee's first name and initial		Last name	Suff.	11 Nonqualified plans	
Donald Doe 5212 Lemon Hill Avenue San Diego, CA, 92108				12a See instructions for box 12	
		13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b	
		14 Other		12c	
f Employee's address and ZIP code				12d	
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax
	13-7654321	20,100.00	142.06		
20 Locality name					

Form **W-2** Wage and Tax Statement

2015

Department of the Treasury—Internal Revenue Service

Copy A For Social Security Administration — Send this entire page with Form W-3 to the Social Security Administration; photocopies are not acceptable.

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 10134D

Do Not Cut, Fold, or Staple Forms on This Page

Please Note: Donald did not file or pay taxes in Tax Year 2014.

Reminder: The purpose of this exercise is simply to familiarize you with online tax preparation. Our friend Donald is fictional, so if you are asked a question that is not answered here, answer “no” or make up your own reply to observe how that answer impacts Donald’s tax situation.

Part I Recipient Information

1 Marketplace identifier CA198962	2 Marketplace-assigned policy number CA35678	3 Policy issuer's name Blue Cross		
4 Recipient's name Donald Doe		5 Recipient's SSN 400-34-2298	6 Recipient's date of birth 06/15/1982	
7 Recipient's spouse's name		8 Recipient's spouse's SSN	9 Recipient's spouse's date of birth	
10 Policy start date January 1, 2015	11 Policy termination date December 31, 2015	12 Street address (including apartment no.) 5212 Lemon Hill Avenue		
13 City or town San Diego	14 State or province CA	15 Country and ZIP or foreign postal code 92108		

Part II Covered Individuals

	A. Covered individual name	B. Covered individual SSN	C. Covered individual date of birth	D. Coverage start date	E. Coverage termination date
16	Donald Doe	400-34-2298			
17	David Doe	400-43-9800			
18					
19					
20					

Part III Household Information

Month	A. Monthly Premium Amount	B. Monthly Premium Amount of Second Lowest Cost Silver Plan (SLCSP)	C. Monthly Advance Payment of Premium Tax Credit
21 January			
22 February	300	360.	270
23 March	300	360.	270
24 April	300	360.	270
25 May	300	360.	270
26 June	300	360.	270
27 July	300	360.	270
28 August	300	360.	270
29 September	300	360.	270
30 October	300	360.	270
31 November	300	360.	270
32 December	300	360.	270
33 Annual Totals	3,600	4,320	3,240

Donald Doe's Federal and California Refund

The screenshot shows the TurboTax interface for Donald Doe's 2015 tax year. The page is titled "My Tax Timeline" and features a navigation bar with "Home" and "Taxes" (selected). The main content area displays two tax return entries for 2015, both with a "Pending" e-file status. The first entry is for the "FEDERAL RETURN", completed on January 27, 2016, with a refund of \$4,707. The second entry is for the "CA STATE RETURN", also completed on January 27, 2016, with a refund of \$142. Below these entries, there is a section titled "SOME THINGS YOU CAN DO" with several links for actions like downloading returns, adding states, and amending returns. At the bottom, there is a search bar with the text "Looking for prior year returns?" and a link to "Load My Tax Timeline".

intuit TurboTax My Account

Home Taxes

My Tax Timeline

2015 Tax Year

FEDERAL RETURN
Completed January 27, 2016

\$4,707
REFUND

Federal e-file status: **Pending**
You've successfully transmitted your 2015 federal tax return on 1/27/2016.
Next step: Keep watching your email. We'll send you another message when your return is accepted or rejected.

CA STATE RETURN
Completed January 27, 2016

\$142
REFUND

California e-file status: **Pending**
You've successfully transmitted your 2015 California tax return on 1/27/2016.
Next step: Keep watching your email. We'll send you another message when your return is accepted or rejected.

SOME THINGS YOU CAN DO

- [Download/print return \(PDF\)](#)
- [View tax data for FAFSA](#)
- [Download all forms and worksheets](#)
- [Add a state](#)
- [Get order details](#)
- [Download .tax file](#)
- [Amend \(change\) return](#)
- [View e-file details](#)

Looking for prior year returns? [Load My Tax Timeline >](#)