College of San Mateo
Official Course Outline

1. **COURSE ID:** ACTG 665MD   **TITLE:** Lacerte Tax Software Basics
   Units: 0.5 units **Hours/Semester:** 8.0-9.0 Lecture hours; and 16.0-18.0 Homework hours
   Method of Grading: Pass/No Pass Only

2. **COURSE DESIGNATION:**
   Degree Credit
   Transfer credit: CSU

3. **COURSE DESCRIPTIONS:**
   Catalog Description:
   Introduction to the use of Lacerte tax software to prepare basic tax returns. Primary emphasis will be on the Individual package; Partnership, Corporation, and Fiduciary packages will also be discussed. This course meets continuing education credit requirements of the California Tax Education Council (CTEC).

4. **STUDENT LEARNING OUTCOME(S) (SLO'S):**
   Upon successful completion of this course, a student will meet the following outcomes:
   1. Discuss the terminology, concepts, principles, and ethics used to apply the rules of taxation for Lacerte Tax Software Basics.
   2. Using the proper formats, perform the calculations and explain the steps to apply the rules of taxation used in Lacerte Tax Software.

5. **SPECIFIC INSTRUCTIONAL OBJECTIVES:**
   Upon successful completion of this course, a student will be able to:
   1. Terminology: Define commonly used terminology
   2. Apply rules: Apply the rules of taxation issued by authoritative governmental entities
   3. Prepare tax forms: Prepare commonly required tax forms
   4. Ethics: Identify and analyze ethical standards issued by professional organizations

6. **COURSE CONTENT:**
   Lecture Content:
   1. History of Lacerte Tax Software basics
   2. Current Federal and/or California regulations related to Lacerte Tax Software basics
   3. Completion of Federal and California tax forms related to Lacerte Tax Software basics
   4. Legal liabilities related to Lacerte Tax Software basics
   5. Ethical responsibilities related to Lacerte Tax Software basics
   6. Documentation required related to Lacerte Tax Software basics
   7. Expected future developments related to Lacerte Tax Software basics

7. **REPRESENTATIVE METHODS OF INSTRUCTION:**
   Typical methods of instruction may include:
   A. Other (Specify): • Lecture/discussion of major aspects of Lacerte Tax Software basics. • Weekly readings on Lacerte Tax Software basics. • Weekly workbook assignments and exercises in which students apply tax knowledge. • Preparation of related tax returns.

8. **REPRESENTATIVE ASSIGNMENTS**
   Representative assignments in this course may include, but are not limited to the following:
   Writing Assignments:
   Completion of required tax forms in class based on cases.
   Reading Assignments:
   Readings on tax regulations and accouting practices applicable to tax compliance.

9. **REPRESENTATIVE METHODS OF EVALUATION**
   Representative methods of evaluation may include:
   A. Exams/Tests
   B. Quizzes
   C. • Quizzes on tax regulations and their applications to tax returns. • Graded exercises on the preparation of

tax returns, applying concepts to best advantage to reduce overall tax liability. • Final examination on tax regulations and their application to Lacerte Tax Software basics.

10. **REPRESENTATIVE TEXT(S):**
    Other:
    A. Current IRS publications and current professional literature

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Origination Date: September 2017
Curriculum Committee Approval Date: October 2017
Effective Term: Fall 2018
Course Originator: Rosemary Nurre

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