Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. Andrea paid $1,000.00/month rent for the tax year.

# Documents:



Step 1 Basic Information

| TP Form / Note | TS Screen | Notes |
| --- | --- | --- |
| SS Card | Start a New 2017 Tax ReturnAvailable Taxpayer Profiles | Ignore the ProfilesSelect “Enter Social Security Number” at the bottom of the screenEnter the TP SSN twice and “Start Return” |
|   | Basic Information – Filing Status  |  |
| Intake Sheet | What is your filing Status? | Answer: Filing Status: SingleContinue |
| SS Card Intake SheetG-Note 2 | Personal Information  Taxpayer Information Address & Phone Number | TS: Enter all information using “Caps Lock”Hint: Use Name and SSN from SS card. (Not Intake Sheet)Hint: SSN format YYY-00-0752TS: Birth date can be entered using drop down menu or filling in the field. TS: Check any of the “Check here” questions that apply – TS: Enter Zip code- TaxSlayer fills in city and state. Correct if requiredTS: Enter New Jersey as the Resident StateTS: Select Continue |
| Intake SheetG-Note 3 | New Jersey Return | Hint: Begin NJ ChecklistTS: Select Municipality from drop down menu (Listed by county). Start typing Bergen to quickly scroll down. Select Edgewater Boro.TS: Select Yes or No for the Gubernatorial Election Fund. See Intake Sheet page 3 and General Note 3. Answer: No for TP, TS: Five Digit Pin for TP is automatically selectedTS: Select Continue |
|  | Dependents or Qualifying Person Do you have any Dependents or Qualifying Person(s) to claim on your return? | TS:  Answer is “No” |

**Federal AGI: 0 Federal Refund: 0 NJ Refund Amount: 0**

Step 2 W-2 Billings Market

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| W-2Billings Market | Left Menu – Federal Section IncomeWages & Salaries Form W-2 Begin | Hint: Make corrections so that information matches the information on the paper W-2Hint: Use EIN 71-9000752Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct Hint: Always round up for amounts ending in --.50Hint: Box 14 NJ Codes are selected from drop down menu. All other entries in box 14 are lumped under “Other”Hint: If NJ State EIN auto populates, check to be sure it is correctTS: Click continue NJ warning TS: Click Continue  |



**Federal AGI: 26,298 Federal Refund: 685 NJ Refund Amount: 29**

Step 3 Interest 1099-INT

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| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| 1099-INTBig City Bank | IncomeInterest and Dividends Form 1099-INT/ 1099-DIV- BeginInterest or Dividend Income -BeginInterest Income, Form 1099-INT,Form 1099-OID…..Continue | Enter values that apply Continue – |



**Federal AGI: 27,231** **Federal Refund: 542 NJ Refund Amount: 12**

Step 4 Federal Deductions, Adjustments & Credits

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| TP Form / Note | TS Screen | Notes |
|  | Left Menu – Federal SectionDeductionsEnter MyselfItemized Deductions – BeginTaxes You Paid - Begin | TS: Go to the Sales Tax Worksheet and enter NJ, Zip Code, and 365 days living in the stateContinue back to Deductions |

**Federal AGI: 27,231 Federal Refund: 542 NJ Refund Amount: 12**

Step 5 Compare Standard vs Itemized Deductions

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| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | **Notes** |
|  | Federal SectionDeductionsEnter MyselfCompare Deductions - Begin | Check to see if using itemized or standard deductions.  Itemized = 602Std = 6,350Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. Continue  |

**Federal AGI: 27,231 Federal Refund: 542 NJ Refund Amount: 12**

Step 6 Health Insurance

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| TP Form / Note | TS Screen | Notes |
| G-Note 2 | Left Menu-Health InsuranceStart Questionnaire | Answer questions in the Health Insurance Section |

Andrea had health insurance that met Minimum Essential Coverage rules for the entire year. She did not purchase it through the marketplace.

**Federal AGI: 27,231 Federal Refund: 542 NJ Refund Amount: 12**

Step 7 New Jersey Return

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| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| I-Note 1G-Note 2,3,4 |  State Return –EditEnter MyselfBasic Information BeginCredits Begin Property Tax/Deduction Begin | Hint: Use the NJ Checklist to enter NJ itemsHINT: Check Basic InformationSAVEAnswer questionsHint: Use scratch pad at TP4F to determine the proper value for Property Tax PaidHint: Property Taxes Paid = (rent\*.18) 12,000x.18= 2,160Hint: Taxpayer meets Property Tax Eligibility RequirementsHint: Were you a homeowner in 2017 - NoSave back to the beginning of the State Return |

Andrea paid $1,000.00/month rent for the tax year.

She did not have any out-of-state purchases on which they did not pay use tax.

**Federal AGI: 27,231 Federal Refund: 542 NJ Refund Amount: 62**

Step 8 Prepare for e-file

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| Intake SheetG Note 5,9,Supplemental Intake Sheet | Left Menu – e-file –  | TS – Clear up any diagnostic messages (if any)TS: Select Federal Return Type “E:file: Paper Check” NextTS: No entries in Fees section except for Client email address TS – Pin numbers for e-file are automatically selected NextTS: Select State Refund Type “E:file: Paper Check” NextTS: Skip Third Party Designee Info NextTS: Consent to Disclose Select the DENY line Enter Primary Pin for TP (any 5 digit number is OK) Enter Primary Pin Date NextTS – Questions – Answer questions from Intake sheet Part VII, lines 5.6 and 7  NextTS: Skip TP ID Information ScreenSaveYou are Done.  |
|  |  |  |

She wants to handle any state refund / amount due like their federal refund / amount due.

**Federal AGI: 27,231 Federal Refund: 542 NJ Refund Amount: 62**