Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. Shirley worked part time to earn spending money.
2. Shirley is single and living with her parents while she attends college full time.
3. Shirley is totally supported by her parents and her parents will claim her as a dependent on their return.

# 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  |  |
| SS Card Intake SheetI-Notes 2,3 | Personal Information  Taxpayer Information Address & Phone Number | Hint: 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: * Claimed as a dependent on someone else’s return
* Over 18 and full time student
* TP wishes to contribute $3 to the Presidential Election Campaign Fund

TS: Enter Zip code- TaxSlayer fills in city and state. Correct if requiredHint: Did you enter the apt. number?TS: Enter New Jersey as the Resident StateTS: Select Continue |
| Intake SheetG-Note 3 | New Jersey Return | Hint: Begin NJ ReturnTS: Select Municipality from drop down menu (Listed by county). Use Municipality Lookup on TPFF to find out township and county for Manahawkin.  Answer: Manahawkin is in Ocean County and Stafford Township.  Start typing Ocean to quickly scroll down. TS: Select Yes or No for the Gubernatorial Election Fund. See Intake Sheet page 3 and General Note 3. Answer: Yes for TP, TS: Five Digit Pin for TO is automatically selected TS: Select Continue |
|  | Dependents/ 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 The Kansas City Steak House

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| W-2The Kansas City Steak House | Left Menu - Federal SectionEnter MyselfIncomeWages & Salaries Form W-2 -Begin | Hint: Make corrections so that information matches the information on the W-2Hint: Add Apt 6A to address.Hint: Use EIN 73-9000752Hint: 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 if it comes upTS: Click Continue back to income |



**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

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 -BeginCheck Tax Exempt Interest Income, Form 1099-INT and 1099-DIVContinue | Enter values that applyHint: Since the interest is tax exempt both Federal and State, there is no adjustment required for the State. Continue - |



**The tax exempt interest received was from a NJ Turnpike Bond and it is tax exempt in NJ.**

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

**Step 4 Federal Deductions, Adjustments & Credits**

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| TP Form / Note | TS Screen | Notes |
|  | Left Menu - Federal Section Deductions Enter Myself Itemized DeductionsTaxes You Paid - Begin | TS: Go to the Add Sales Tax Worksheet and enter NJ, Zip Code, and 365 days living in the stateContinue back to Deductions |

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

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 = 51Std = 4,662Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. Continue  |

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

Step 6 Health Insurance

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| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| G-Note 2 | Left Menu-Health InsuranceStart Questionnaire | Hint: Parents are responsible for her health insurance. Skip the Health Insurance Screen. |

Shirley is totally supported by her parents and her parents will claim her as a dependent on their return.

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

Step 7 New Jersey Return

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| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| I-Note 2,3G-Note 2,3,4 | State Section –EditBasic Information | Hint: Use the NJ Checklist to enter NJ itemsHINT: Check Basic Information Hint: No other inputs are required for NJ. TP does not pay rentSave back to the beginning of the State Return |

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

**Step 8 Prepare for e-file**

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| Intake SheetSupplemental Intake SheetG Note 5 | 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: 4,312 Federal Refund: 104 NJ Refund Amount: 19**