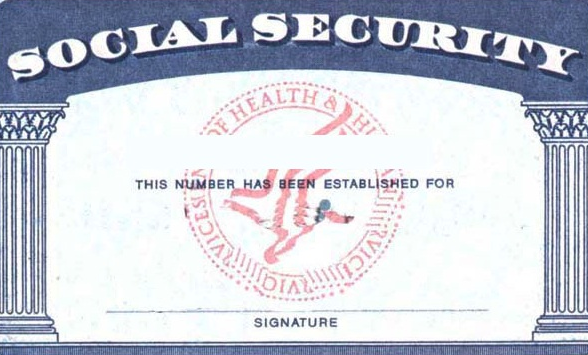
Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. Helen has not lived with her husband, Peter Rosemont, for several years. His SSN is 782-00-yyyy. Helen is not claiming an exemption for Peter.
2. Peter did not itemize last year nor will he be itemizing this year.
3. Helen rents a home and pays $1,400.00/month rent.

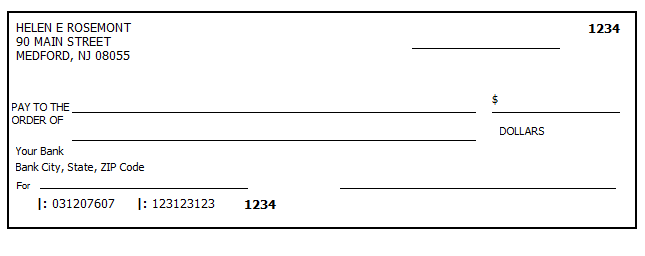
# Documents:



**791-xx-yyyy**

**Helen E. Rosemont**

**Helen E. Rosemont**



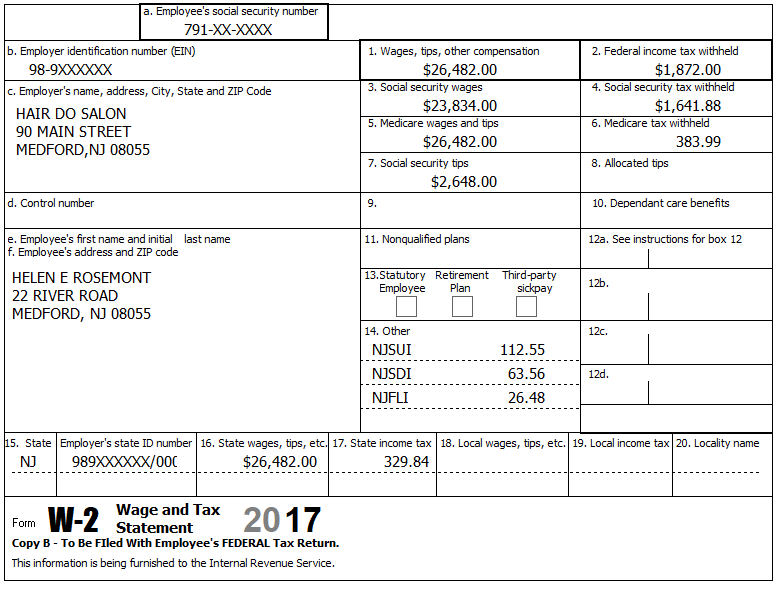
**Step 1 Basic Information**

| TP Form / Note | TS Screen | Notes |
| --- | --- | --- |
|  |  |  |
| SS Card | Start a New 2017 Tax Return  Available Taxpayer Profiles | Ignore the Profiles  Select “Enter Social Security Number” at the bottom of the screen  Enter the TP SSN twice and “Start Return” |
|  | Basic Information – Filing Status |  |
| Intake Sheet | What is your filing Status? | Hint: Use Caps Lock to enter data  Select Filing status from drop down.  Answer: Filing Status: Married Filing Separate  TS: Do not check either box on the Married Separate Screen.  Continue |
| SS Card  Intake Sheet  I-Note 1  G-Note 2 | Personal Information  Taxpayer Information  Address & Phone Number | Hint: Use Name and SSN from SS card. (Not Intake Sheet)  Hint: SSN format YYY-00-0752  TS: Birth date can be entered using drop down menu or filling in the field.  TS: Check any of the “Check here” questions that apply – Answer: Presidential Election Campaign Fund for TP  TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required  TS: The only spouse information that is required is his name and SSN.  TS: Enter New Jersey as the Resident State  TS: Select Continue |
| Intake Sheet  G-Note 3 | New Jersey Return | Hint: Begin NJ Checklist  TS: Select Municipality from drop down menu (Listed by county). Start typing Burlington to quickly scroll down. Medford Twsp is in Burlington County  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 TP 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 Hair Do Salon**

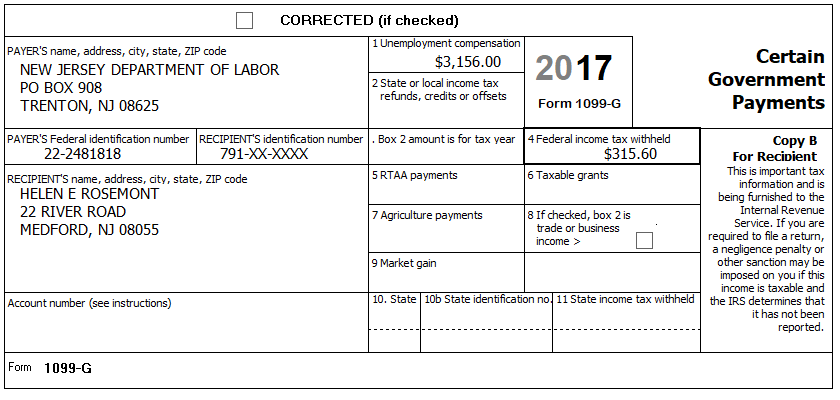
|  |  |  |
| --- | --- | --- |
| W-2  Hair Do Salon | Left Menu  Federal Section  Income  Wages & Salaries Form W-2- Begin | Hint: Make corrections so that information matches the information on the W-2  Hint: Use EIN 98-9000752  Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct  Hint: Always round up for amounts ending in --.50  Hint: 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 correct  TS: Click continue NJ warning  TS: Click Continue back to income |



**Federal AGI: 26,482 Federal Refund: -73 NJ Refund Amount: -46**

**Step 3 Unemployment 1099-G**

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| 1099-G  NJ Dep of Labor | UnemploymentCompensation Form 1099-G Box 1 – Begin  Add or Edit a 1099-G - Begin | TS: This 1099G worksheet is for the:Taxpayer  Hint: Phone number not required  Hint: State information not required  Continue |



**Federal AGI: 29,638 Federal Refund: -230 NJ Refund Amount: -46**

Step 4 Federal Deductions, Adjustments & Credits

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

**Federal AGI: 29,638 Federal Refund: -230 NJ Refund Amount: -46**

Step 5 Compare Standard vs Itemized Deductions

|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | **Notes** |
|  | Federal Section  Deductions  Enter Myself  Compare Deductions - Begin | Check to see if using itemized or standard deductions.  Itemized = 533  Std = 6,350  Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu.  Continue |

**Federal AGI: 29,638 Federal Refund: -230 NJ Refund Amount: -46**

Step 6 Health Insurance

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

Helen had health insurance that met Minimum Essential Coverage rules for the entire year. She did not purchase it through the marketplace. Peter is not part of Helen’s Health Household.

**Federal AGI: 29,638 Federal Refund: -230 NJ Refund Amount: -46**

Step 7 New Jersey Return

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| I-Note 1,3  G-Note 2,3,4 | State Return –Edit  Basic Information- Edit  Credits   * Property Tax/Deduction - Begin | Hint: Use the NJ Checklist to enter NJ items  HINT: Check Basic Information  SAVE  Answer questions  Hint: Use scratch pad at TP4F to determine the proper value for Property Tax Paid  Hint: Property Taxes Paid = (rent\*.18) 1400X12X.18=3024  Hint: Taxpayer meets Property Tax Eligibility Requirements  Hint: Did you and your spouse have the same residence for 2017?  Answer: No  Hint: Were you a homeowner in 2017  Answer: No  Save back to the beginning of the State Return |

Helen has not lived with her husband, Peter Rosemont, for several years. Helen is not claiming an exemption for Peter.

Helen rents a home and pays $1,400.00/month rent.

Helen is not a Veteran.

**Federal AGI: 29,638 Federal Refund: -230 NJ Refund Amount: 7**

Step 8 Prepare for e-file

|  |  |  |
| --- | --- | --- |
| Intake Sheet  G Note 5 | Left Menu – e-file – | TS – Clear up any diagnostic messages (if any)  TS: Select Federal Return Type “E:file: Direct Debit”  Next  TS: No entries in Fees section except for Client email address  TS – Pin numbers for e-file are automatically selected  Next  TS: Select State Refund Type “E:file: Direct Deposit”  Next  TS: Enter Bank Account Information – Name of Bank is not required.  TS: Enter amount of tax payment ($230) under Direct Deposit Information  TS: During the tax season you must enter the date you want the money taken from the account  TS: The Debit Phone Number defaults to the TP primary phone number. Change if required  Next  TS: Skip Third Party Designee Info  Next  TS: Consent to Disclose  Select the DENY line  Enter Primary Pin for TP (any 5 digit number is OK)  Enter Primary Pin Date  Next  TS – Questions – Answer questions from Intake sheet Part VII, lines 5.6 and 7  Next  TS: Skip TP ID Information Screen  Save  You are Done. |

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

**Federal AGI: 29,638 Federal Refund: -230 NJ Refund Amount: 7**