**Intake Sheet, page 1, Shaded Area**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| John | 1: Yes | 2: No | 3: Yes | 4: Yes | 5: Yes |
| George | 1: No | 2: No | 3: Yes | 4: Yes | 5: Yes |

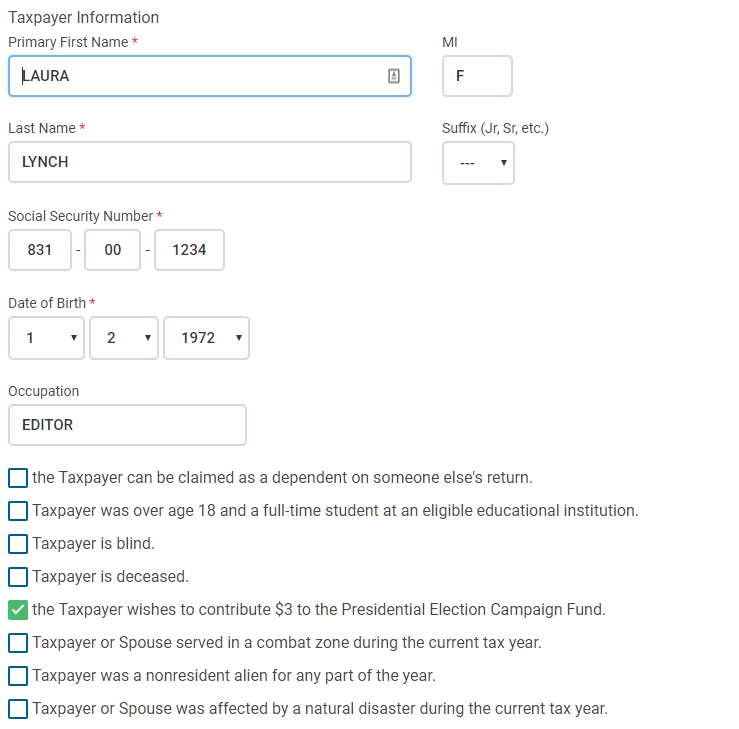
**Filing Status = Head of Household**

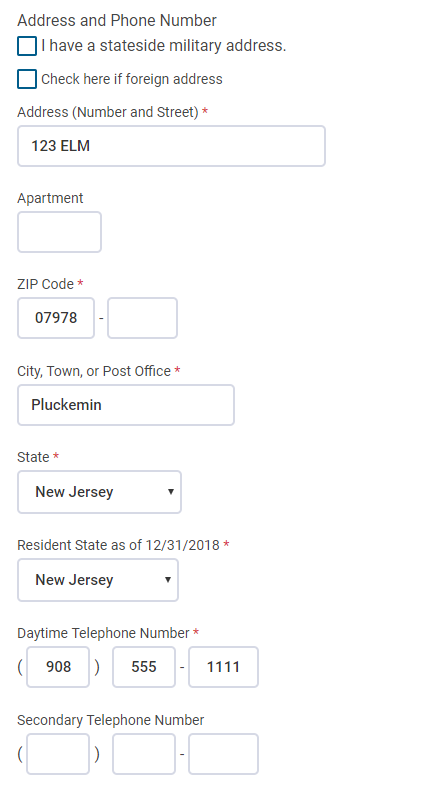
**AGI -$28,734**

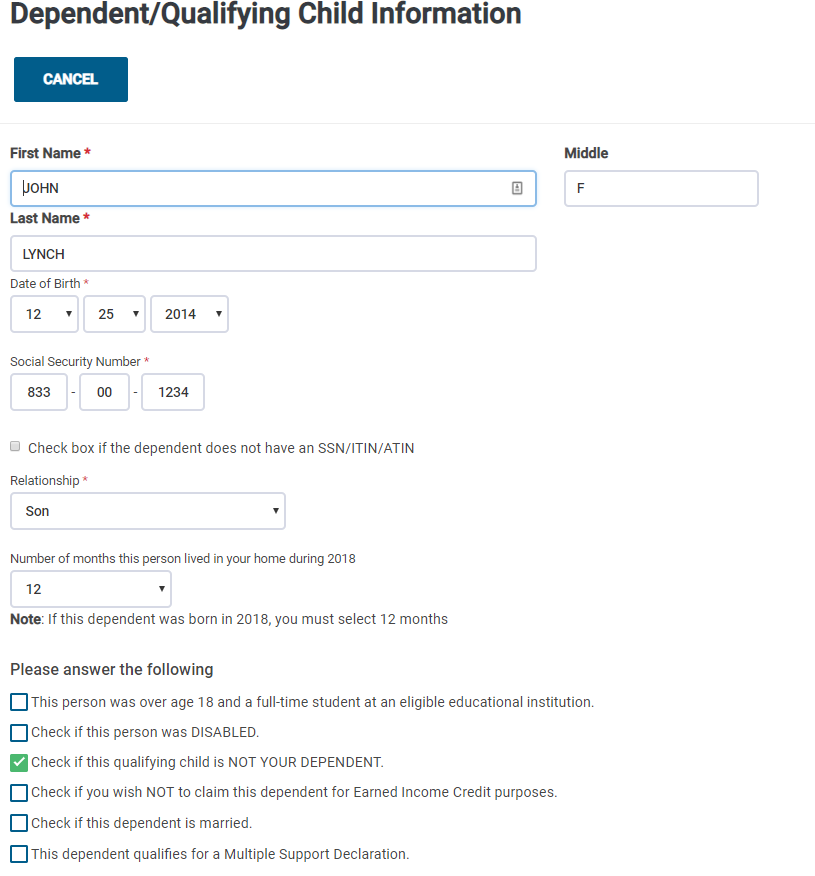
**Federal Refund - $7,056**

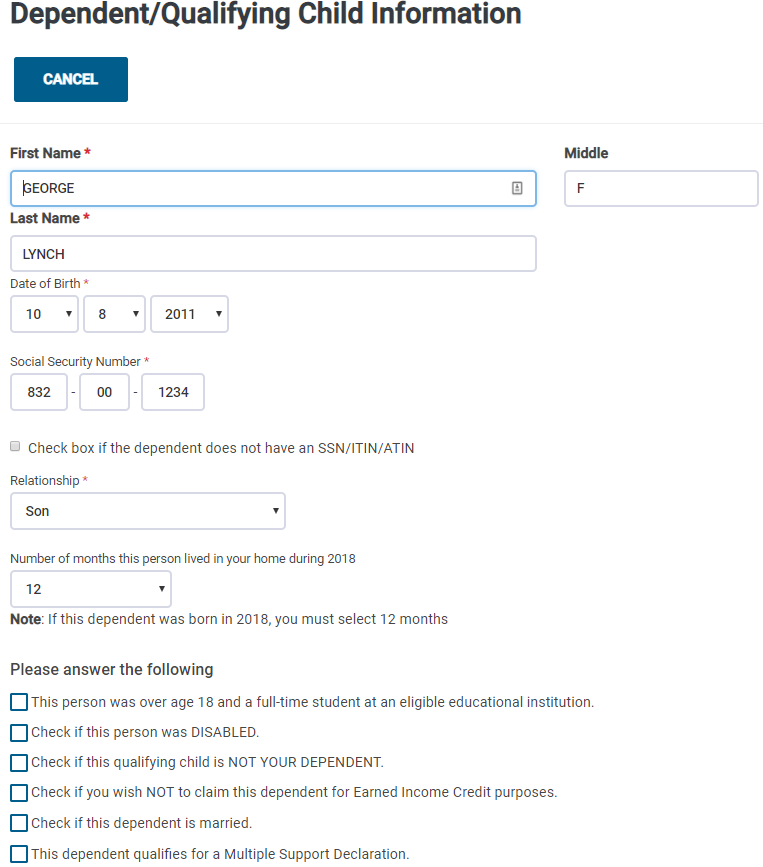
**State Refund – $**

**Personal Information**









**W-2 Wages**

ACME Corp

EIN – includes a number

Check employer name and address

ACME CORP

123 MAIN

PLUCKEMIN

NJ

Box 1 = 14,598

Box 2 = 1,002

Box 3 = 14,598

Box 4 = 905

Box 5 = 14,598

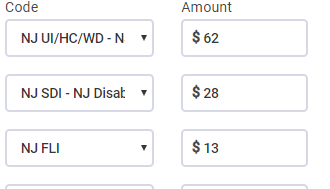
Box 6 = 212

Box 12

Code = DD

Amount = 3,000

Box 14



New Jersey Information

State = New Jersey

EIN = a number is in the box

Box 16 = 14,598

Box 17 = 575

ACME Diner

EIN – includes a number

Check employer name and address

ACME DINER

123 MAIN

PLUCKEMIN

NJ

Box 1 = 2,532

Box 2 = 328

Box 3 = 1,944

Box 4 = 157

Box 5 = 2,532

Box 6 = 37

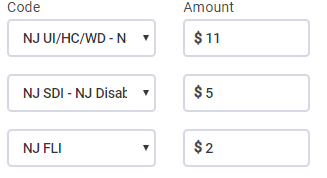
Box 7 = 588

Box 8 = 250

Note: The amount from box 8 automatically goes to Form 4137. You can do a search for the 4137 in

TSO, or view the completed form in the printed return.

Box 14



New Jersey Information

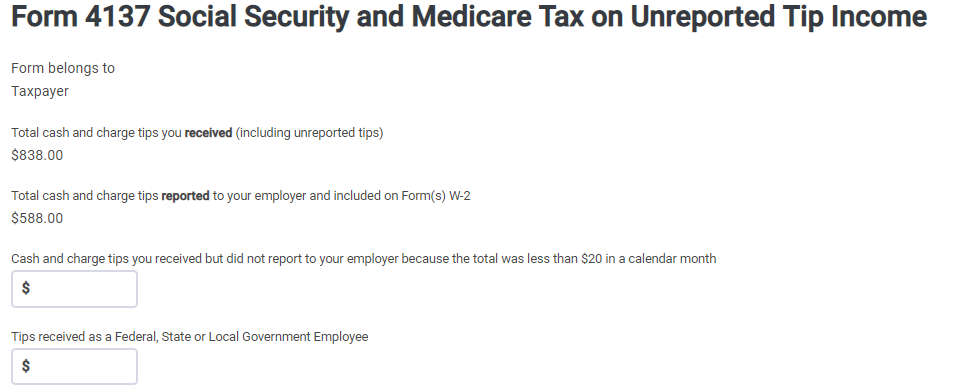
State = New Jersey

EIN = a number is in the box

Box 16 = 2,532

Box 17 = 201

**Form 4137**



**1099-R**

ACME IRAS

EIN – includes a number

Check PAYER’S name and address

ACME IRAS

123 MAIN

PLUCKEMIN

NJ

Box 1 = 5,000

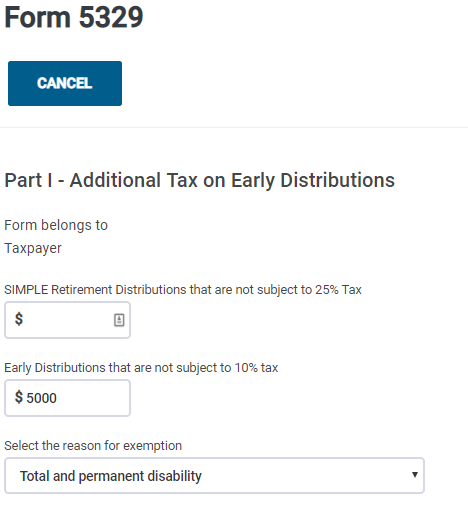
Box 2a = 5,000

Box 4 = 750

Box 7 = 1

IRA/SEP/SIMPLE box checked

Form 5329 should have been completed because Laura is disabled.



**1099-R**

ACME Pensions

EIN – includes a number

Check payer’s name and address

ACME PENSIONS

123 MAIN

PLUCKEMIN

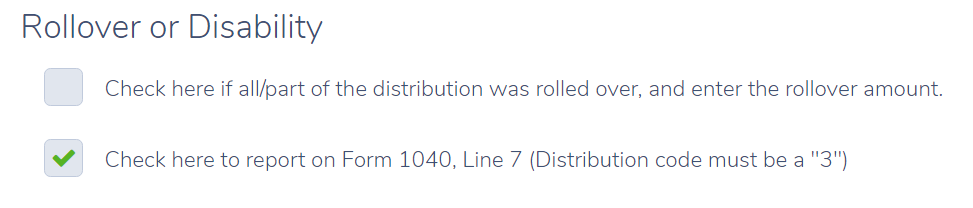
NJ

Box 1 = 5,400

Box 2a = 5,400

Box 7 = 3

Check that box on 1099-R checked to move amount to 1040 Line 7



NJ Checklist

Amount of the ACME Pensions Disability Pension should be entered on the NJ Checklist in the Income Subject to Tax Section. (Adjustments to line 20a)

**1099-MIsc**

ACME Services

EIN – Check a number is entered

Payer

ACME SERVICES

123 MAIN

PLUCKEMIN, NJ

Box 7 = 5,000

ACME Partners

EIN – Check a number is entered

Payer

ACME PARTNERS

123 MAIN

PLUCKEMIN, NJ

Box 7 = 7,000

**Schedule C**

Basic Information

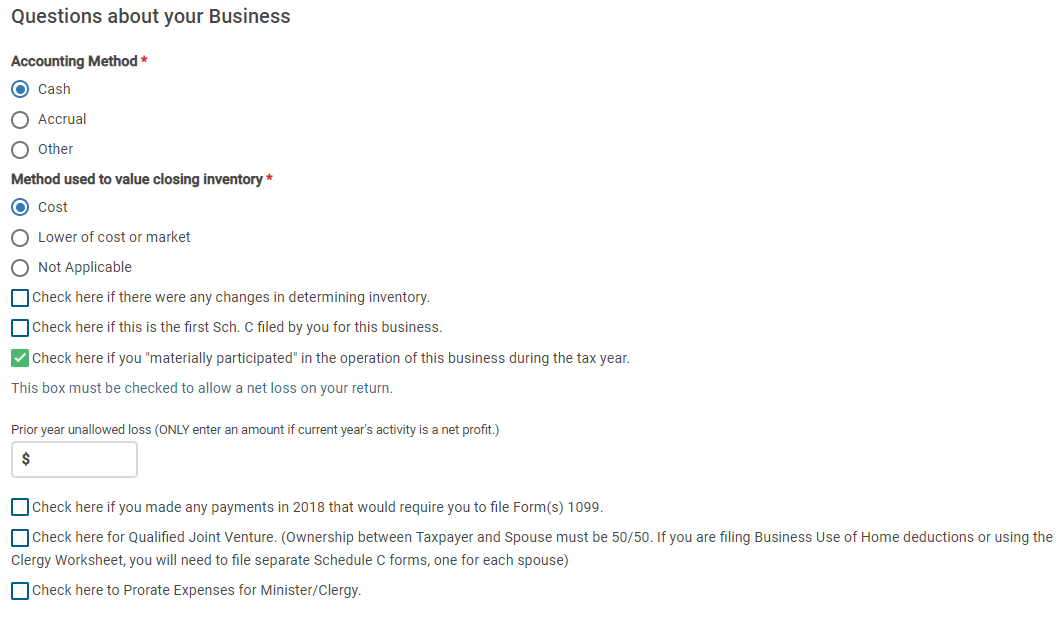
Business Name = Laura Lynch

Business Code = 561410

Description of Business = Document preparation

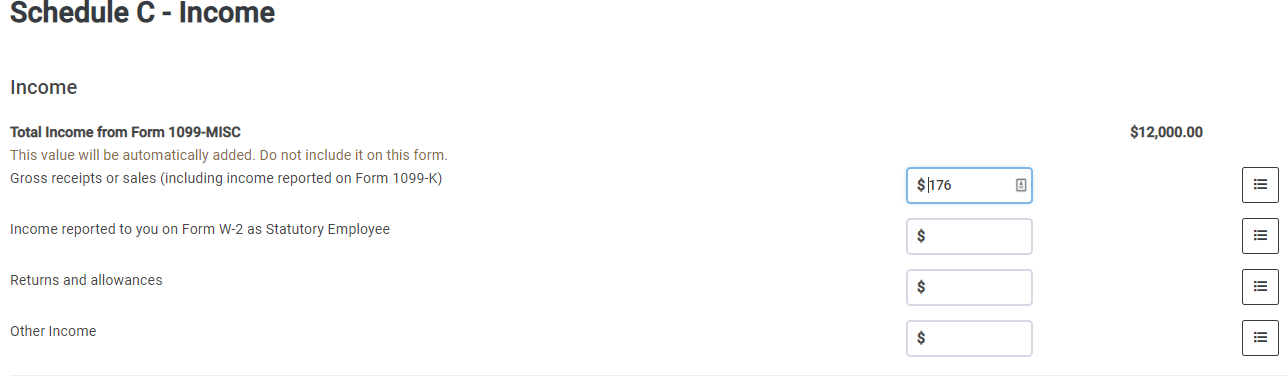
All other lines blank

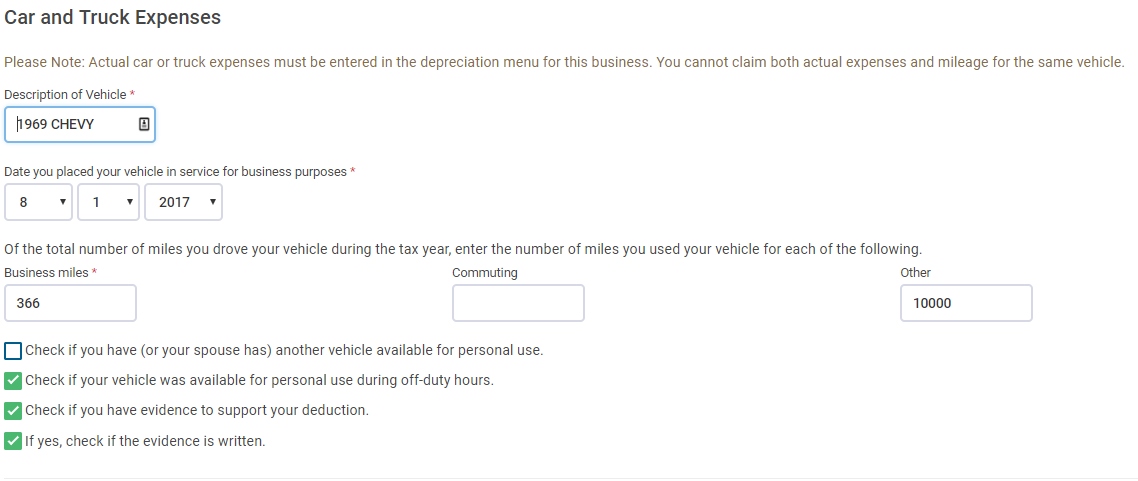
Questions About Business



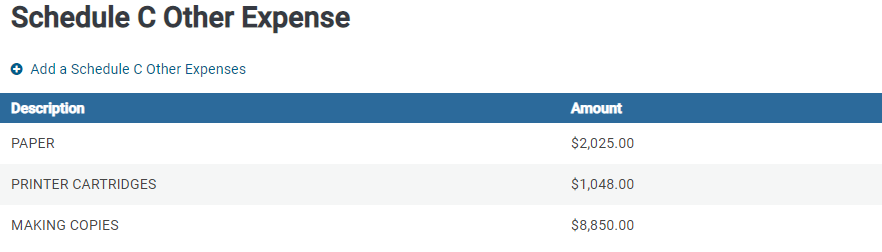
Income

Total amounts from both 1099 MISCs.

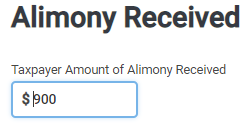




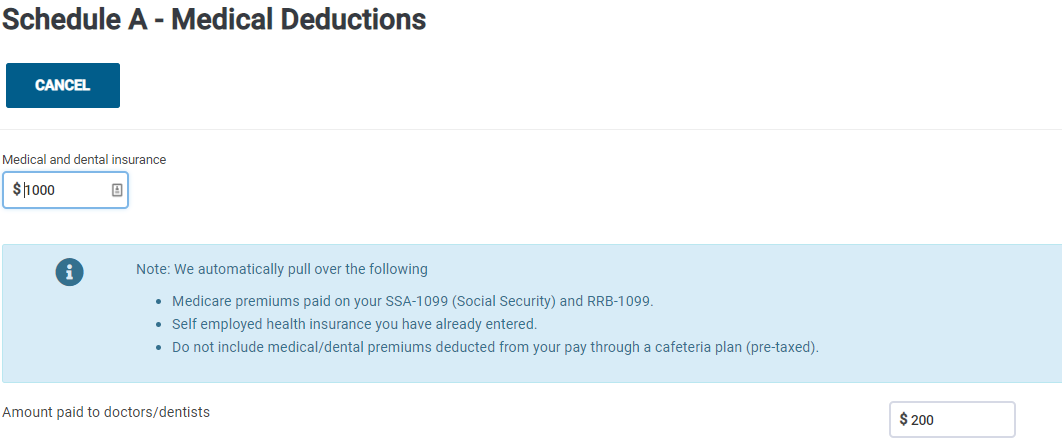
Other Expenses



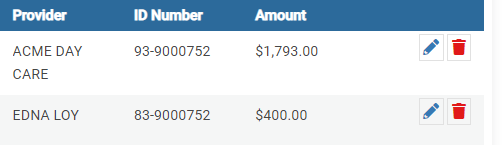
**Alimony Received**



**Schedule A Medical**



**Child Care Credit Form 2441**





**Health Insurance**

Everyone on the return has Health Insurance for the entire year.

Screen 1=Yes

Screen 2 = No

Screen 3 = OK

Screen 4 = Yes

**Efile**

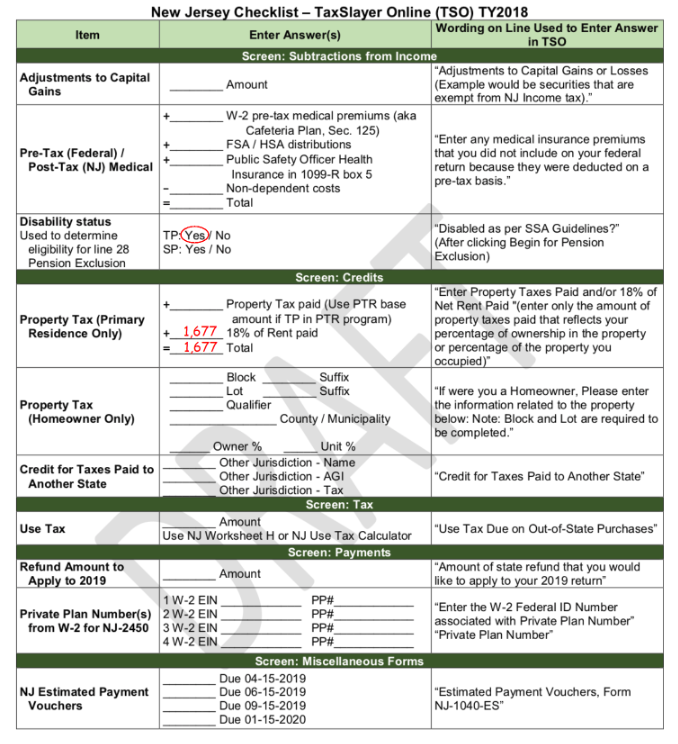
The Efile screens have not been updated in TSO 2018. Check that the Federal File Type has been entered.

**STOP UNTIL NJ IS AVAILABLE IN TAXSLAYER.**

**New Jersey Return**

Check that the numbers shown in the NJ Checklist below have been properly entered in to TaxSlayer.





Rent Calculation: [(755\*6) + (798\*6)] \* .18 = 1677