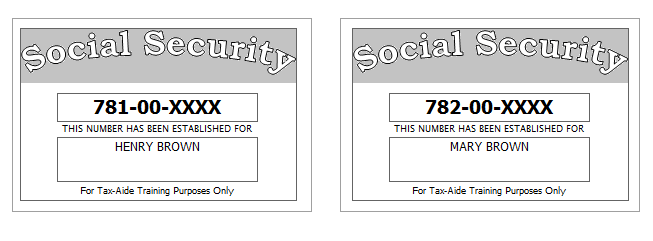
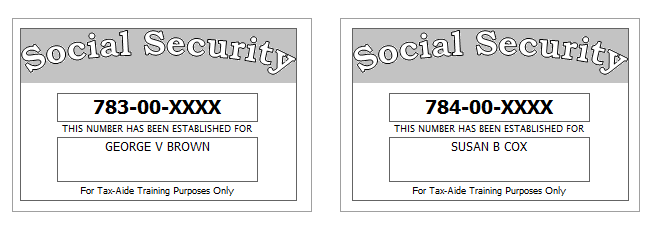
Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. George was a full-time student at a local college
2. Mary paid $144 in Student Loan interest during the tax year
3. The Browns paid $9,000 in rent while living in Dover through June (They had lived at the Dover address for many years)
4. The Browns moved in July when they inherited a house in Denville. They paid $4,534 in property taxes, but had no mortgage payments. According to the postcard from the tax office: – Block=50001, Lot=00002, Qualifier is blank.
5. Henry started receiving his pension from Fidelity this year
6. Neither Henry or Mary are Veterans.
7. The Browns filed for and are eligible for a Homestead Benefit property tax credit





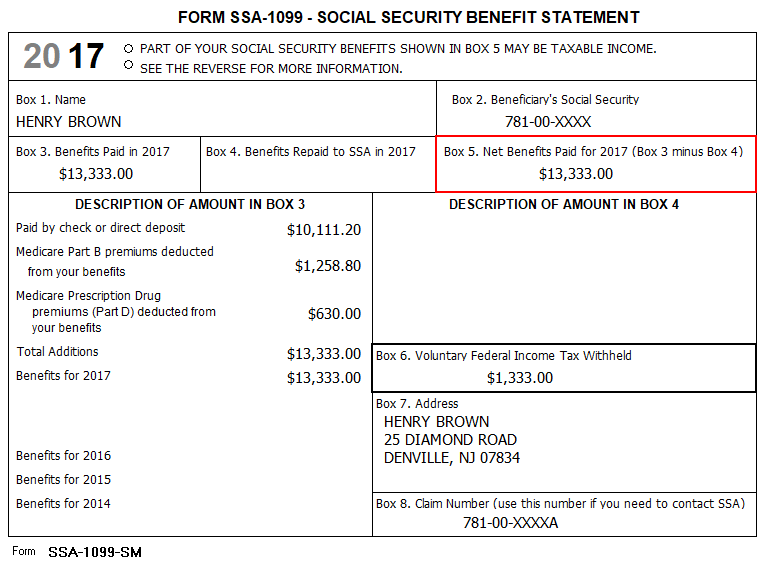
Step 1 Basic Information

| **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” |
| Intake Sheet | What is your filing Status? | Answer: Filing Status: Married filing joint  Continue |
| SS Card  Intake Sheet  G-Note 2 | Personal Information  Taxpayer Information  Spouse 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-00-0752  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 –  TS: Spouses last name auto populates when field is selected. Change if required.  TS- Check presidential election campaign fund for SP  TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required  TS: Enter New Jersey as the Resident State  TS: Select Continue |
| Intake Sheet  G-Note 2, 3 | New Jersey Return | Hint: Begin NJ Checklist  TS: Select Municipality from drop down menu (Listed by county). Start typing Morris to quickly scroll down  TS: Answer question regarding dependent Health Insurance. Answer is Yes.  TS: Select Yes or No for the Gubernatorial Election Fund. See Intake Sheet page 3 and General Note 3. No for TP, Yes for SP.  TS: Five Digit Pin for TP and SP is automatically selected  TS: Select Continue |
| I-Note 1 | Dependents or Qualifying Person(s)  Do you have any Dependents or Qualifying Person(s) to claim on your return? | TS:  Answer is “Yes”. |
|  | Dependent/Qualifying Child  Information | Add dependent information  Hint: Use name and SSN from SS card (Not Intake Sheet)  TS: Last name auto populates. Change if required  Answer: SSN format = YYY-00-0752  Check the “Check if” questions that apply  Answer: Both dependents are full time students, but only George is over 18 and a full time student at an eligible educational institution  Add second dependent information  Hint: Susan’s last name is Cox. Make the change.  TS: Select “Continue” |

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

Step 2 SSA-1099

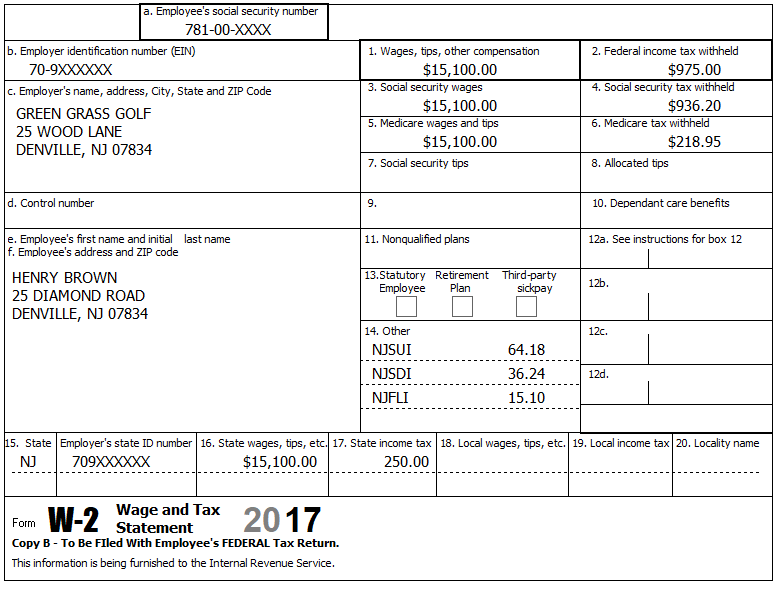
|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| SSA-1099 | Federal Section  Income  IRA/Pension Distribution Form 1099-R/RRB/SSA  - Begin  Social Security Benefits/RRB-1099 -Begin | Enter SSA-1099 Data  Hint: Use TP4F Scratch Pad to document Medicare Parts B, C, D. Insert total in “Taxpayer’s Medicare Premiums”. Amount = $1889  TS: Continue, Continue |



**Federal AGI: 0 Federal Refund: 1,333 NJ Refund Amount: 0**

Step 3 W-2 Green Grass Golf

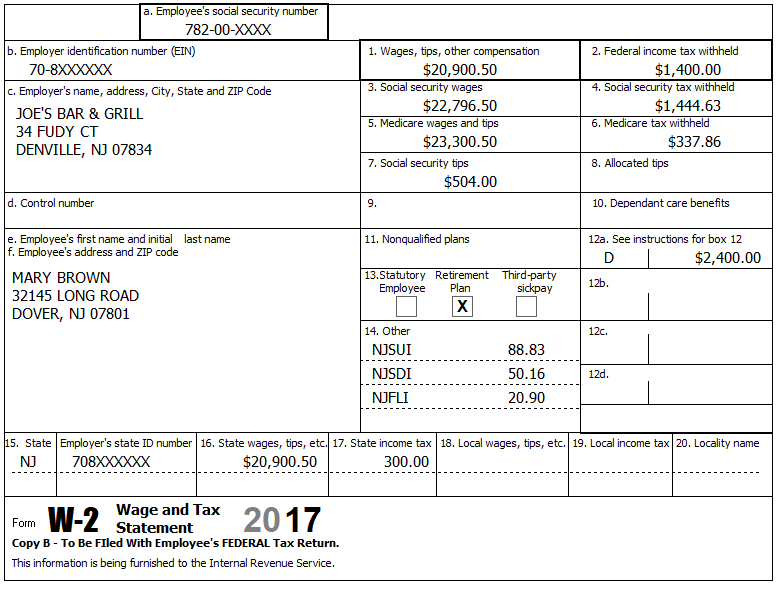
|  |  |  |
| --- | --- | --- |
| W-2  Green Grass Golf | Left Menu - Income  Wages & Salaries Form W-2  Begin | Hint: Henry Brown W-2  Hint: Make corrections so that information matches the information on the W-2. TP address shown on the TS W-2 should match the paper W-2  Hint: Use EIN 70-9000752  Hint: 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 Save & Enter Another |



**Federal AGI: 15,100** **Federal Refund: 7,924 NJ Refund Amount: 2,216**

Step 4 W-2 Joe’s Bar & Grill

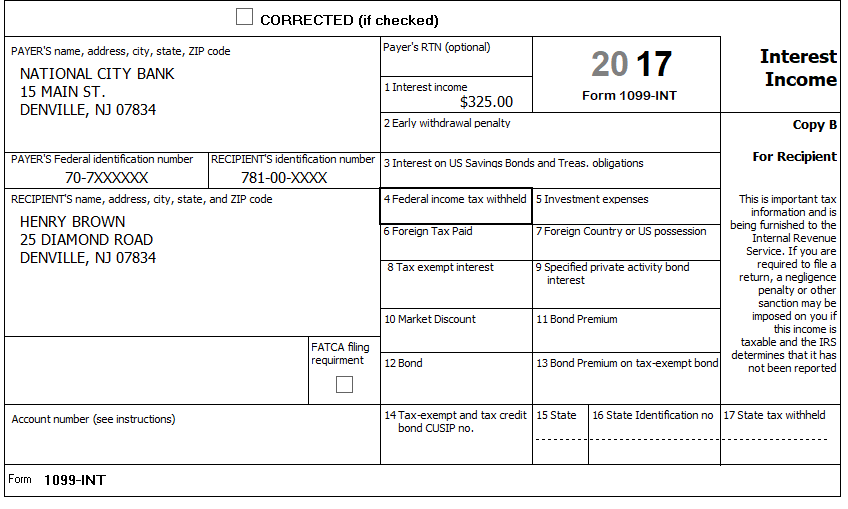
|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| W-2 Joe’s Bar & Grill | Add W-2 Statement | Hint: W-2 for Mary Brown  Hint: Make corrections so that information matches the information on the paper W-2   * Change address on TS W-2 to match paper W-2   Hint: Use EIN 70-8000752  Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct  TS: Certain characters are not allowed for E-File (#, ‘). TS will remove them once the form is saved  Hint: Check boxes 3-7 for correct entries  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 |



**Federal AGI: 41,335 Federal Refund: 4,743 NJ Refund Amount: 800**

Step 5 Interest 1099-INT

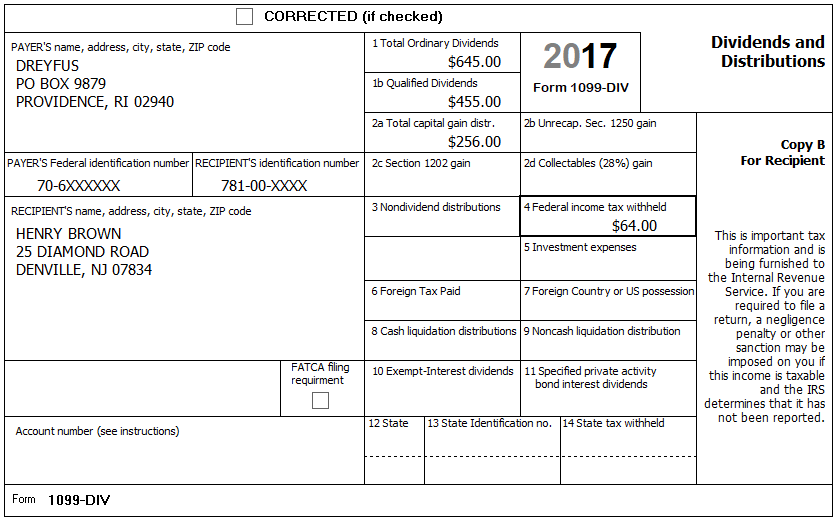
|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| 1099-INT  National City Bank | Left Menu - Income  Interest and Dividend Income, Form 1099-INT/ 1099-DIV  - Begin  Interest or Dividend Income -Begin  Interest Income, Form 1099-INT,Form  1099-OID…..  -Continue  Continue | Hint: Select for Taxpayer  Enter values that apply  Continue |



**Federal AGI: 41,823 Federal Refund: 4,587 NJ Refund Amount: 755**

Step 6 Dividends 1099-DIV

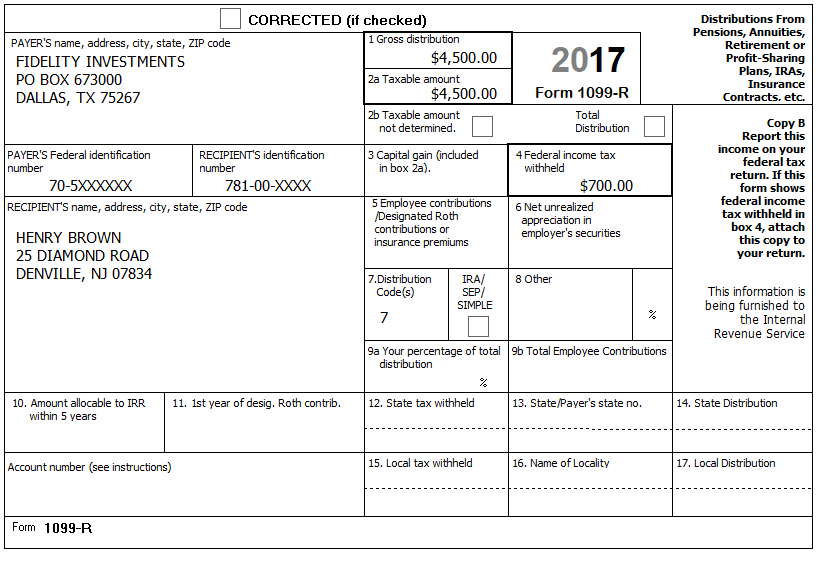
|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| 1099-DIV  Dreyfus | Add an Interest and Dividends  Dividend Income, Form 1099-DIV  Continue | Hint: Select for Taxpayer  Enter values that apply  Continue |



**Federal AGI: 43,174 Federal Refund: 4,302 NJ Refund Amount: 641**

Step 7 1099-R

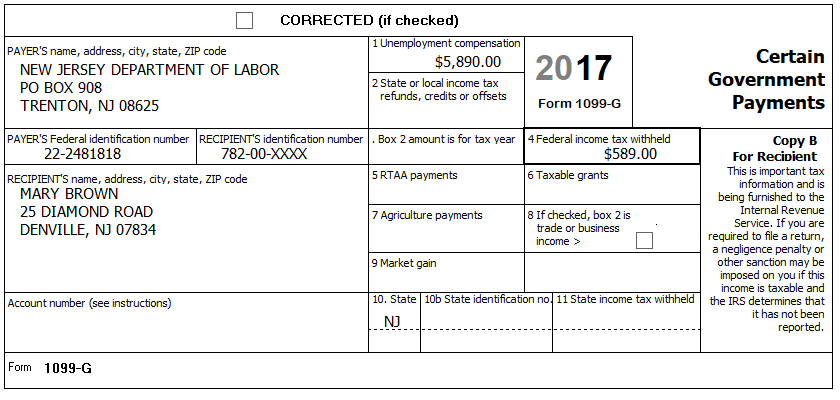
|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| 1099-R  Fidelity Investments | Left Menu -Federal Section- Income  IRA/Pension Distribution Form 1099-R / RBA, SSA – Edit  Add or edit a 1099-R  -Begin | Hint: “This 1099-R is for Henry  Hint: EIN – 70-5000752  Hint: Make corrections so that information matches the information on the 1099-R  Hint: Taxable amount defaults to Gross Distribution Amount. Adjust as required.  TS: You do not have to select a State for income to go to the State return.  TS: Continue |



**Federal AGI: 51,462 Federal Refund: 2,311 NJ Refund Amount: 94**

Step 8 Unemployment 1099-G

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



**Federal AGI: 58,950 Federal Refund: 1,782 NJ Refund Amount: 94**

Step 9 Student Loan Interest

|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | **Notes** |
| I-Note 2 | Left Menu  Federal Section – Deductions  Enter Myself  Adjustments - Begin  Student Loan Interest Deduction - Begin | Enter Student Loan Interest Amount  Continue to Deductions |

Mary paid $144 in Student Loan interest during the tax year

**Federal AGI: 58,806 Federal Refund: 1,805 NJ Refund Amount: 94**

Step 10 Itemized Deductions – Taxes You Paid

|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | **Notes** |
| I-Note 4 | Left Menu-Federal Section -Deductions – Enter Myself  Itemized Deductions – Begin  Taxes You Paid - Begin | Enter real estate taxes paid  Go to ADD SALES TAX WORKSHEET and enter ZIP Code and 365 days living in NJ  Continue back to Deductions |
|  | Continue back to Deductions  -Compare Deductions – Begin | Check to see if using itemized deductions or standard deductions  - Standard Deduction= 13,950 Itemized Deductions – 5,383  Continue |

The Browns moved in July when they inherited a house in Denville. They paid $4,534 in property taxes but had no mortgage payments.

**Federal AGI: 58,806 Federal Refund: 1,805 NJ Refund Amount: 94**

Step 11 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 = 5,383  Std = 13,950  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: 58,806 Federal Refund: 1,805 NJ Refund Amount: 94**

Step 12 Health Insurance

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

Every person on the return had health insurance that met Minimum Essential Coverage rules for the entire year. They did not purchase it through the marketplace.

**Federal AGI: 58,806 Federal Refund: 1,805 NJ Refund Amount: 94**

Step 13 New Jersey Return

|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | **Notes** |
| I-Note 3,4,6,7  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  Hint: Use scratch pad at TP4F to determine the proper value for Property Tax Paid  Hint: Property Taxes Paid = (rent\*.18) + Property taxes paid   * (9,000\*.18) + 4,534 = $6,154   Hint: Taxpayer meets Property Tax Eligibility Requirements  Hint: Taxpayer was a homeowner in 2017  Hint: Brown filed for homestead benefit  Hint: Enter the Block and Lot numbers  Hint: County Property Located in Denville.  Save back to the beginning of the State Return |

The Browns paid $9,000 in rent while living in Dover through June (They had lived at the Dover address for many years)

The Browns moved in July when they inherited a house in Denville. They paid $4,534 in property taxes but had no mortgage payments. According to the postcard from the tax office: – Block=50001, Lot=0002, Qualifier is blank.

The Browns filed for and are eligible for a Homestead Benefit property tax credit

County Property located in: Morris-Denville

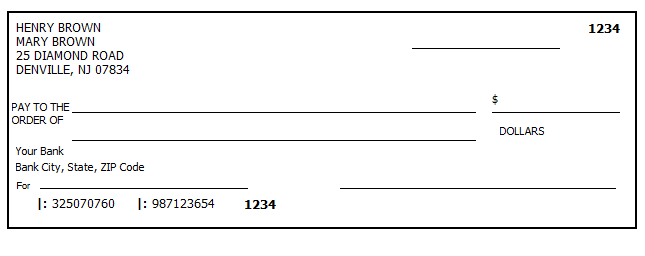
They had no out-of-state purchases on which they did not pay Use tax

**Federal AGI: 58,806 Federal Refund: 1,805 NJ Refund Amount: 201**

Step 14 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 Deposit”  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 Information – Name of Bank not required. Deposit amount is required. Click “PULL REFUND”  Next  TS: Skip Third Party Designee Info  Next  TS: Consent to Disclose Tax Return Information – Check DENY and enter 5 digit pin ( any 5 digit number) and date for TP and SP  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 |

They want to handle any state refund / amount due like their federal refund / amount due



**Federal AGI: 58,806 Federal Refund: 1,805 NJ Refund Amount: 201**