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:



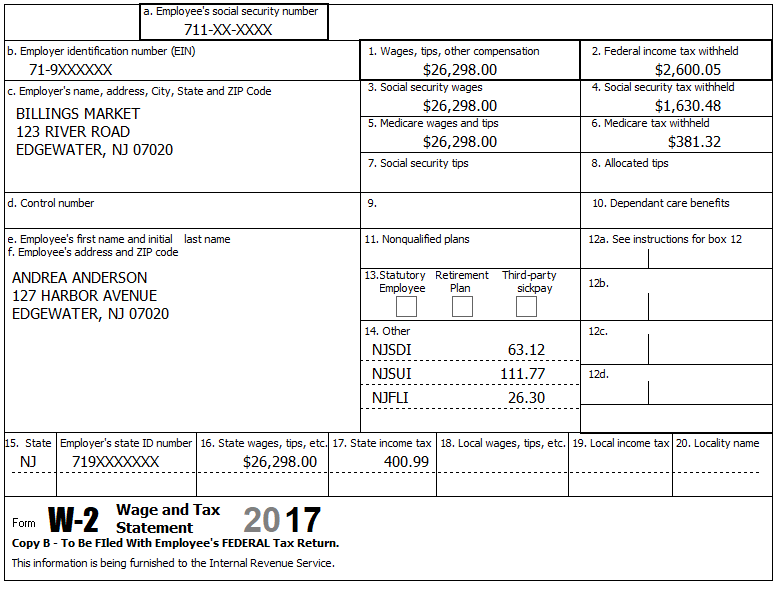
Step 1 Basic Information

| TP Form / Note | TS Screen | Notes |
| --- | --- | --- |
| SS Card | Start a New 2017 Tax 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? | Answer: Filing Status: Single  Continue |
| SS Card  Intake Sheet  G-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-00-0752  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: 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 3 | New Jersey Return | Hint: Begin NJ Checklist  TS: 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 selected  TS: 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-2  Billings Market | Left Menu – Federal Section  Income  Wages & Salaries Form W-2  Begin | Hint: Make corrections so that information matches the information on the paper W-2  Hint: Use EIN 71-9000752  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 |

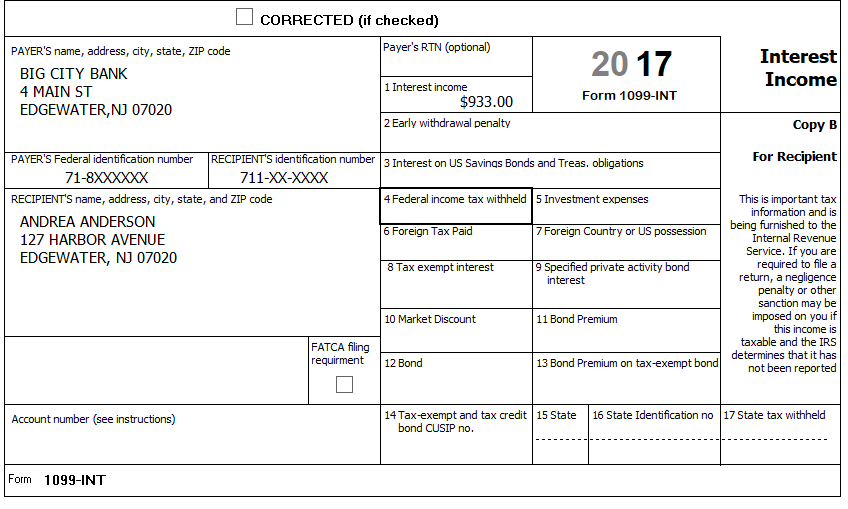


**Federal AGI: 26,298 Federal Refund: 685 NJ Refund Amount: 29**



Step 3 Interest 1099-INT

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| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| 1099-INT  Big City Bank | Income  Interest and Dividends Form 1099-INT/ 1099-DIV- Begin  Interest or Dividend Income -Begin  Interest 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 Section  Deductions  Enter Myself  Itemized Deductions – Begin  Taxes You Paid - Begin | TS: Go to the Sales Tax Worksheet and enter NJ, Zip Code, and 365 days living in the state  Continue 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 Section  Deductions  Enter Myself  Compare Deductions - Begin | Check to see if using itemized or standard deductions.  Itemized = 602  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: 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 Insurance  Start 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 1  G-Note 2,3,4 | State Return –Edit  Enter Myself  Basic Information  Begin  Credits  Begin  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) 12,000x.18= 2,160  Hint: Taxpayer meets Property Tax Eligibility Requirements  Hint: Were you a homeowner in 2017 - No  Save 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 Sheet  G 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”  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: Paper Check”  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: 27,231 Federal Refund: 542 NJ Refund Amount: 62**