Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. The Conways moved from an apartment in Hoboken to an apartment in Jersey City on September 30 of the current tax year. They paid $2,000/month rent in Hoboken through September and $1,000/month in Jersey City starting in October.
2. Charles lost his job in August of the current tax year and collected unemployment for the balance of the year.
3. In January of the tax year the Conways purchased a 50” LCD TV from Amazon.com and did not pay sales tax on the purchase amount of $1,500.00. The sales tax amount (6.875% in 2017) would have been $103.13



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” |
| Intake Sheet | What is your filing Status? | Answer: Filing Status: Married filing jointContinue |
| SS Card Intake SheetG-Note 2I- Note 1 | 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-00-0752TS: Birth date can be entered using drop down menu or filling in the field. TS: Check any of the “Check here” questions that apply – TS: Spouses last name auto populates when field is selected. Change if required.TS: Enter Zip code- TaxSlayer fills in city and state. Correct if requiredTS: Enter New Jersey as the Resident StateTS: Select Continue |
| Intake SheetG-Note 2, 3 | New Jersey Return | Hint: Begin NJ Checklist TS: Select Municipality from drop down menu (Listed by county). Answer: Jersey City is in Hudson County. Start typing Hudson to quickly scroll down. TS: Answer question regarding dependent Health Insurance. There are no dependents, just skip the question. TS: Select Yes or No for the Gubernatorial Election Fund. See Intake Sheet page 3 and General Note 3. No for TP and SpouseTS: Five Digit Pin for TP and SP is automatically selected TS: Select Continue |
| Intake Sheet.  | 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 Vampire Engineering

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| W-2Vampire Engineering | Let’s look at the money you earned Enter MyselfIncome Wages & Salaries Form W-2 - Begin | Hint: Charles Conway W-2Hint: Make corrections so that information matches the information on the W-2. Correct the address of Employee in TaxSlayer to match paper W-2. Correct address for this W-2.Hint: Use EIN 72-9000752Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct Hint: Check boxes 3-7 for correct entriesHint: Always round up for amounts ending in --.50Hint: Box 12 Use dropdown to select correct codeHint: Box 13- Retirement Plan should be checkedHint: 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 correctHint: Correct NJ wagesTS: Click Save & Enter Another NJ warning if applicable - Continue |



  **Federal AGI: 32,867** **Federal Refund: 3,792 NJ Refund Amount: 538**

Step 3 W-2 Smart Kids Charter School

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| --- | --- | --- |
| W-2 Smart Kids Charter School | Add W-2 Statement | Hint: W-2 is for CarolHint: Make corrections so that information matches the information on the paper W-2Hint: Use EIN: 72-8000752Hint: 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 applicableTS: Click Continue  |



**Federal AGI: 53,043 Federal Refund: 1,899 NJ Refund Amount: 578**

Step 4 Interest 1099-INT

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| **TP Form / Note** | **TS Screen** | Notes |
| 1099-INTPNC Bank | Federal Section - IncomeInterest Income, Form 1099-INT/ 1099-DIV- BeginInterest or Dividend Income -BeginInterest Income, Form 1099-INT,Form 1099-OID…..Continue | Hint: Select for TaxpayerEnter values that apply Continue – Back to Income |



**Federal AGI: 53,254 Federal Refund: 1,861 NJ Refund Amount: 573**

Step 5 Unemployment 1099-G

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| TP Form / Note | TS Screen | Notes |
| 1099-GNJ Dep of Labor | Left Menu- Federal Section - IncomeUnemploymentCompensation Form 1099-G Box 1 – BeginAdd or Edit a 1099-G - Begin | TS: This 1099G worksheet is for the: Charles ConwayHint: Phone number not requiredHint: State information not requiredContinue |

Charles lost his job in August of the current tax year and collected unemployment for the balance of the year.



**Federal AGI: 63,114 Federal Refund: 1,270 NJ Refund Amount: 573**

Step 6 Federal Deductions, Adjustments & Credits

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

**Federal AGI: 63,114 Federal Refund: 1,270 NJ Refund Amount: 573**

Step 7 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 = 1,834Std = 12,700Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. Continue  |

**Federal AGI: 63,114 Federal Refund: 1,270 NJ Refund Amount: 573**

Step 8 Health Insurance

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| TP Form / Note | TS Screen | Notes |
| G-Note 2 | Left Menu -Health InsuranceStart 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: 63,114 Federal Refund: 1,270 NJ Refund Amount: 573**

Step 9 New Jersey Return

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| TP Form / Note | TS Screen | Notes |
| I-Note 1 & 3G-Note 2,3 |  State Return –EditBasic Information -EditCredits* ` Property Tax/Deduction

Tax* Use Tax on Out of State Purchase
 | Hint: Use the NJ Checklist to enter NJ itemsHINT: Check Basic Information – Default values will not appear as selectedHint: Use scratch pad at TP4F to determine the proper value for Property Tax PaidHint: Property Taxes Paid = (rent\*.18). [(2000x9)+ (1000x3)]x.18= 3,780Hint: Taxpayer meets Property Tax Eligibility RequirementsHint: Use scratch pad to determine Use tax on TV purchase = 103.Hint: Taxpayer was not a homeowner in 2017. Continue back to the beginning of the State Return |

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**Federal AGI: 63,114 Federal Refund: 1,270 NJ Refund Amount: 549**

Step 10 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: Direct Deposit” 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: Direct Deposit” NextTS: Enter Bank Information – Name of Bank not required. Deposit amount is required. Click “PULL REFUND” NextTS: Skip Third Party Designee Info NextTS: Consent to Disclose Tax Return Information – Check DENY and enter 5 digit pin ( any 5 digit number) and date for TP and SP NextTS – Questions – Answer questions from Intake sheet Part VII, lines 5.6 and 7 NextTS: Skip TP ID Information ScreenSaveYou are Done |

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

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**Federal AGI: 63,114 Federal Refund: 1,270 NJ Refund Amount: 549**