Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. Shirley worked part time to earn spending money.
2. Shirley is single and living with her parents while she attends college full time.
3. Shirley is totally supported by her parents and her parents will claim her as a dependent on their return.

# Documents:



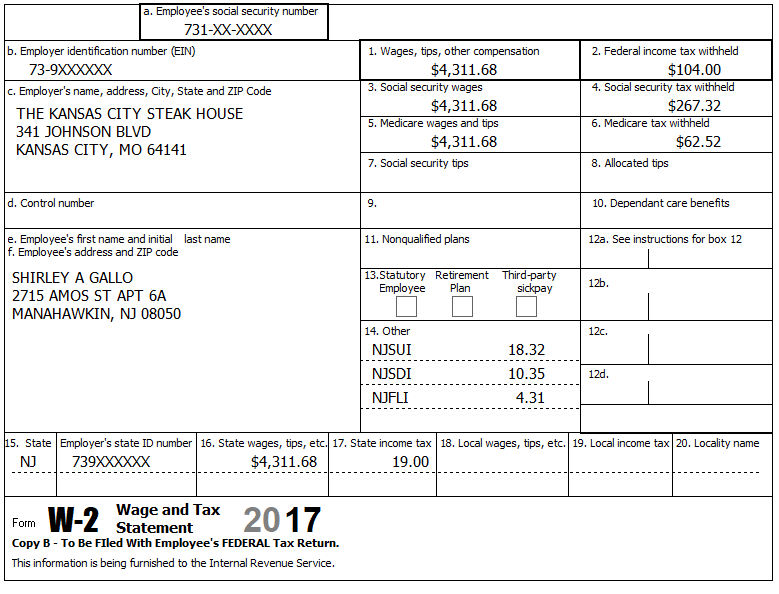
Step 1 Basic Information

| 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 |  |
| SS Card  Intake Sheet  I-Notes 2,3 | Personal Information  Taxpayer Information  Address & Phone Number | Hint: 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:   * Claimed as a dependent on someone else’s return * Over 18 and full time student * TP wishes to contribute $3 to the Presidential Election Campaign Fund   TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required  Hint: Did you enter the apt. number?  TS: Enter New Jersey as the Resident State  TS: Select Continue |
| Intake Sheet  G-Note 3 | New Jersey Return | Hint: Begin NJ Return  TS: Select Municipality from drop down menu (Listed by county). Use Municipality Lookup on TPFF to find out township and county for Manahawkin.  Answer: Manahawkin is in Ocean County and Stafford Township.  Start typing Ocean to quickly scroll down.  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 TO 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 The Kansas City Steak House

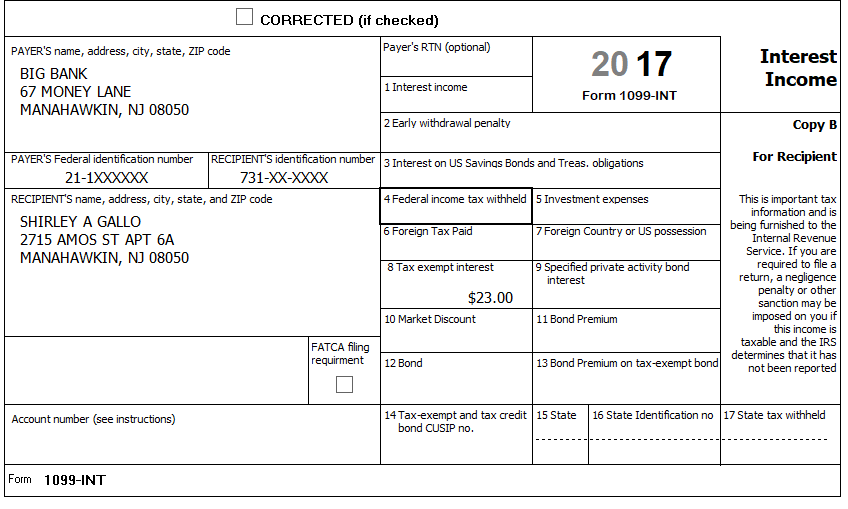
|  |  |  |
| --- | --- | --- |
| W-2  The Kansas City Steak House | Left Menu - Federal Section  Enter Myself  Income  Wages & Salaries Form W-2 -Begin | Hint: Make corrections so that information matches the information on the W-2  Hint: Add Apt 6A to address.  Hint: Use EIN 73-9000752  Hint: If the 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 if it comes up  TS: Click Continue back to income |



**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

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  Check Tax Exempt Interest Income, Form 1099-INT and 1099-DIV  Continue | Enter values that apply  Hint: Since the interest is tax exempt both Federal and State, there is no adjustment required for the State.  Continue - |





**The tax exempt interest received was from a NJ Turnpike Bond and it is tax exempt in NJ.**

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

**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  Taxes You Paid - Begin | TS: 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: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

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 = 51  Std = 4,662  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: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

Step 6 Health Insurance

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| TP Form / Note | TS Screen | Notes |
| G-Note 2 | Left Menu-Health Insurance  Start Questionnaire | Hint: Parents are responsible for her health insurance. Skip the Health Insurance Screen. |

Shirley is totally supported by her parents and her parents will claim her as a dependent on their return.

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

Step 7 New Jersey Return

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| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| I-Note 2,3  G-Note 2,3,4 | State Section –Edit  Basic Information | Hint: Use the NJ Checklist to enter NJ items  HINT: Check Basic Information  Hint: No other inputs are required for NJ. TP does not pay rent  Save back to the beginning of the State Return |

**Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19**

**Step 8 Prepare for e-file**

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| --- | --- | --- |
| Intake Sheet  Supplemental Intake Sheet  G Note 5 | 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: 4,312 Federal Refund: 104 NJ Refund Amount: 19**