Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

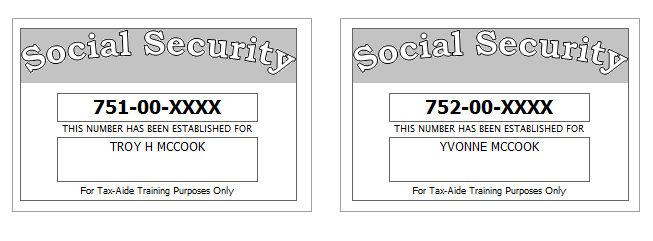
The McCooks own a home. They paid $11,000 in property taxes for the year. Block: 49 Lot: 2. They are eligible and file a homestead benefit application

They do not have a Mortgage.

Troy McCook is a Veteran

Robert McCook is still in High School.

# Documents:





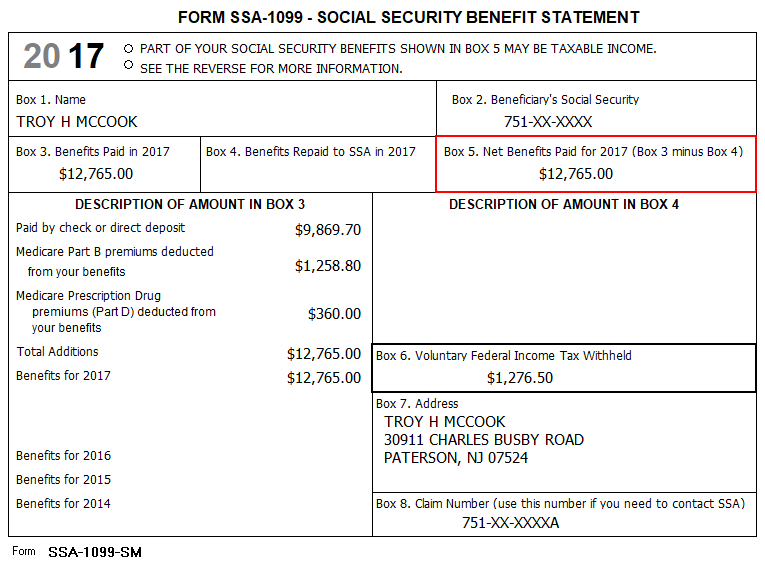
**Step 1 Basic Information**

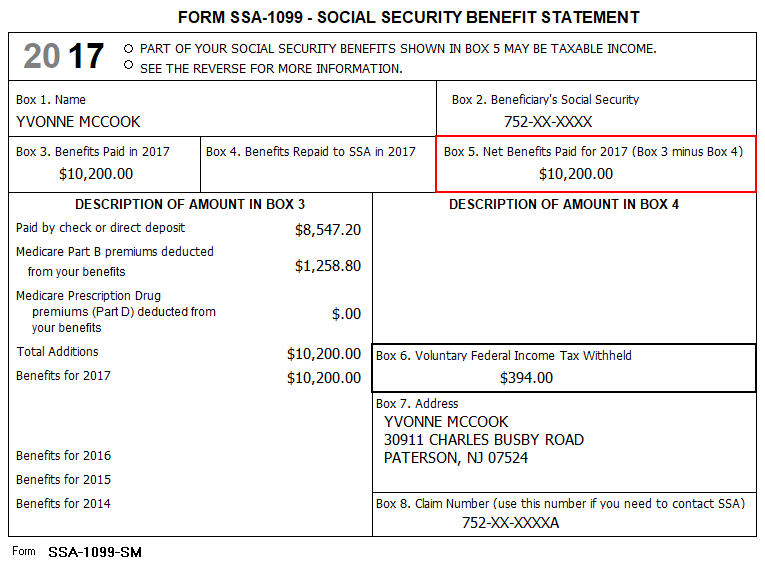
| TP Form / Note | TS Screen | Notes |
| --- | --- | --- |
| SS Card | Start a New 2017 Tax Return  Available Taxpayer Profiles | Ignore the Profiles  Select “Enter Social Security Number” at the bottom of the screen  Enter the TP SSN twice and “Start Return” |
| Intake Sheet | What is your filing Status? | Answer: Filing Status: Married filing jointly  Continue |
| SS Card  Intake Sheet | 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 –  Hint: Check here if the Spouse wishes to contribute $3 to the Presidential Election Campaign Fund  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 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). Paterson is in Passaic County. Start typing Passaic 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.  Answer: No for TP, Yes for SP.  TS: Five Digit Pin for TP and SP is automatically selected  TS: Select Continue |
|  | Dependents/ 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: The last name auto populates. Change if required  Answer: SSN format = YYY-00-0752  Check the “Check if” questions that apply  Answer: Robert is a full-time student but he is not over 18.  TS: Continue - Continue |

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

Step 2 SSA-1099 Troy & Yvonne McCook

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| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| SSA-1099 | Left Menu -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 = $1,619  TS: Continue, Continue |

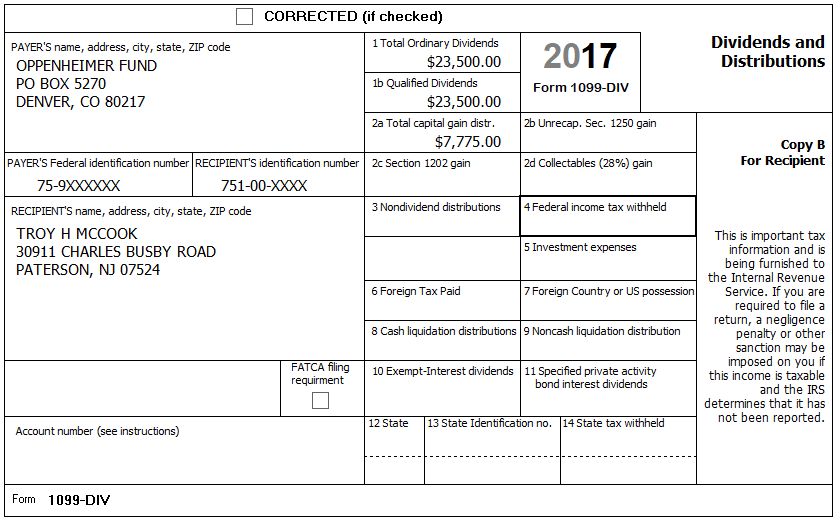




**Federal AGI: 0 Federal Refund: 1671 NJ Refund Amount: 0**

**Step 3 Dividends 1099-DIV - Oppenheimer**

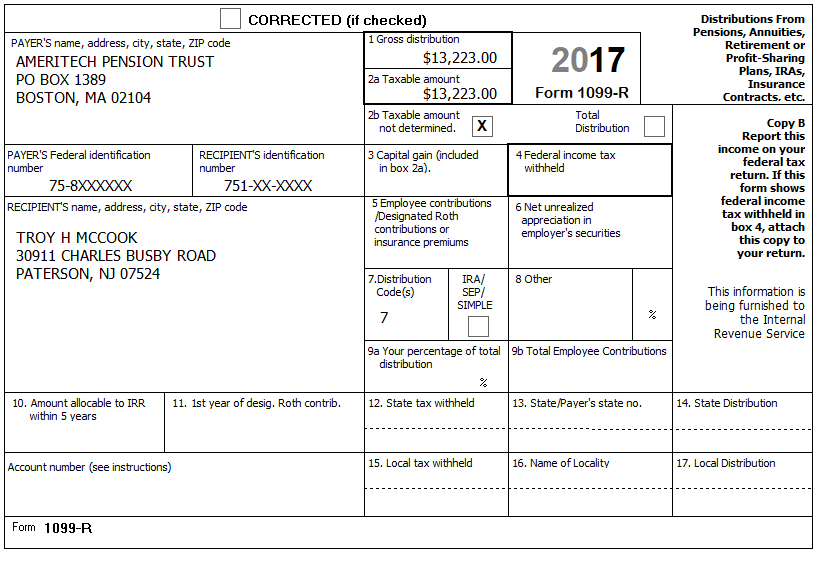
|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| 1099-DIV  Oppenheimer | Left Menu- Federal Section -Income  Interest and Dividends Form 1099-INT/1099-DIV –  Begin  Interest or Dividend Income – Begin  Dividend Income, Form 1099-DIV-Continue  Continue | Hint: Select for Taxpayer  Enter values that apply  Continue Until Back to Income |



**Federal AGI: 36,654 Federal Refund: 1,671 NJ Refund Amount: 0**

**Step 4 1099-R Ameritech**

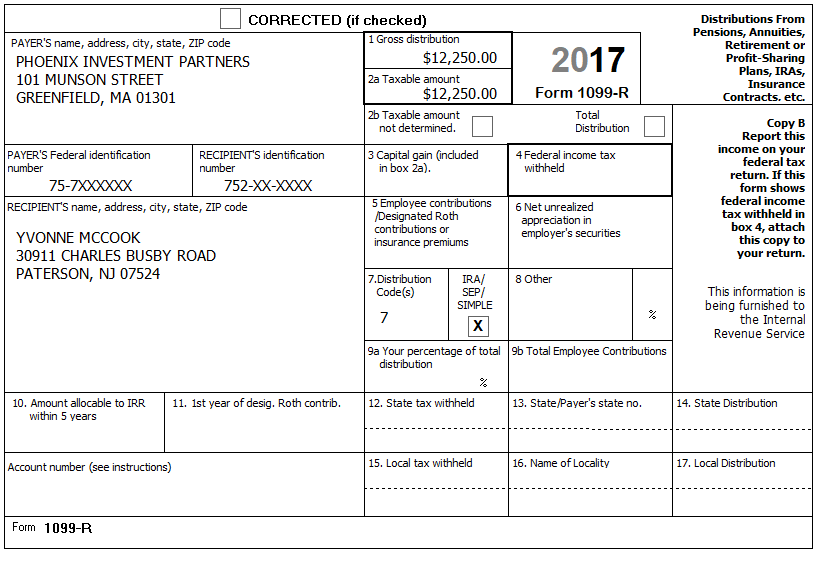
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| TP Form / Note | TS Screen | Notes |
| 1099-R  Ameritech | Left Menu-Federal Section – Income  IRA/Pension Distribution Form 1099-R / RBA, SSA – Edit  Add or edit a 1099-R  Begin | Hint: “This 1099-R is for Troy  Hint: Make corrections so that information matches the information on the 1099-R  Hint: Taxable amount defaults to Gross Distribution Amount. Adjust as required.  Hint: Did you check the Taxable Amount Not Determined Box?  TS: You do not have to select a State for income to go to the State return.  TS: Save & Enter Another |



**Federal AGI: 60,682 Federal Refund: 1,465 NJ Refund Amount: 0**

Step 5 1099-R Phoenix

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| **TP Form / Note** | **TS Screen** | Notes |
| 1099-R  Phoenix Investments |  | Hint: “This 1099-R is for Yvonne  Hint: Make corrections so that information matches the information on the 1099-R  Hint: Taxable amount defaults to Gross Distribution Amount. Adjust as required.  Hint:  Did you check the IRA/SEP/Simple Box?  TS: You do not have to select a State for income to go to the State return.  TS: Continue |



**Federal AGI: 76,268 Federal Refund: -92 NJ Refund Amount: 0**

**Step 6 Itemized Deductions – Taxes You Paid**

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| TP Form / Note | TS Screen | Notes |
| I-Note 4 | Left Menu-Federal Section -Deductions – Enter Myself  Itemized Deductions – Begin  Taxes You Paid - Begin | TS: Go to the AddSales Tax Worksheet and enter NJ and 365 days living in NJ  TS: Continue - Continue  TS: Enter real estate taxes paid  Continue Until Deductions |

The McCooks own a home. They paid $11,000 in property taxes for the year. They do not have a Mortgage

**Federal AGI: 76,268 Federal Refund: -92 NJ Refund Amount: 0**

**Step 7 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 deductions or standard deductions.  Itemized = 11,900  Std = 15,200  Continue |

**Federal AGI: 76,268 Federal Refund: -92 NJ Refund Amount: 0**

**Step 8 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 |

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: 76,268 Federal Refund: -92 NJ Refund Amount: 0**

**Step 9 New Jersey Return**

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| TP Form / Note | TS Screen | Notes |
| I-Note 1  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  TS: Check Basic Information –  Answer: TP is a Veteran  Save  TS: Credits – Begin  TS: Property Tax Credit/Deduction - Begin  Hint: Property Taxes Paid = $11,000  Hint: Taxpayer meets Property Tax Eligibility Requirements  Hint: TP was a Homeowner in 2017  Hint: County Property located in: Passaic County-Paterson  Save back to the beginning of the State Return |

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

The McCooks own a home. They paid $11,000 in property taxes for the year. Block: 49 Lot: 2.

They are eligible and file a homestead benefit application

They do not have a Mortgage

**Federal AGI: 76,268 Federal Refund: -92 NJ Refund Amount: 0**

Step 10 Prepare for e-file

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| Intake Sheet  G Note 5 | Left Menu – e-file – | TS – Clear up any diagnostic messages (if any)  TS: Select Federal Return Type “E:file: Mail Payment”  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: Mail Payment”  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: 76,268 Federal Refund: -92 NJ Refund Amount: 0**