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 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 jointlyContinue |
| 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-00-0752TS: Birth date can be entered using drop down menu or filling in the field. TS: Check any of the “Check here” questions that apply – Hint: Check here if the Spouse wishes to contribute $3 to the Presidential Election Campaign FundTS: 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). Paterson is in Passaic County. Start typing Passaic to quickly scroll downTS: 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 informationHint: Use name and SSN from SS card (Not Intake Sheet)TS: The last name auto populates. Change if requiredAnswer: SSN format = YYY-00-0752Check the “Check if” questions that applyAnswer: 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-IncomeIRA/Pension Distribution Form 1099-R/RRB/SSA- BeginSocial 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 = $1,619TS: Continue, Continue |





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

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

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| TP Form / Note | TS Screen | Notes |
| 1099-DIVOppenheimer | Left Menu- Federal Section -IncomeInterest and Dividends Form 1099-INT/1099-DIV – BeginInterest or Dividend Income – BeginDividend Income, Form 1099-DIV-ContinueContinue | Hint: Select for TaxpayerEnter values that applyContinue 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-RAmeritech | Left Menu-Federal Section – IncomeIRA/Pension Distribution Form 1099-R / RBA, SSA – EditAdd or edit a 1099-RBegin | Hint: “This 1099-R is for TroyHint: Make corrections so that information matches the information on the 1099-RHint: 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-RPhoenix Investments |  | Hint: “This 1099-R is for Yvonne Hint: Make corrections so that information matches the information on the 1099-RHint: 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 MyselfItemized Deductions – BeginTaxes You Paid - Begin | TS: Go to the AddSales Tax Worksheet and enter NJ and 365 days living in NJTS: Continue - ContinueTS: Enter real estate taxes paidContinue 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 SectionDeductionsEnter MyselfCompare Deductions - Begin | Check to see if using itemized deductions or standard deductions.  Itemized = 11,900 Std = 15,200Continue  |

**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 MenuHealth 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: 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 1G-Note 2,3,4 | State Return –EditBasic Information - EditCredits* Property Tax/Deduction-Begin
 | Hint: Use the NJ Checklist to enter NJ itemsTS: Check Basic Information – Answer: TP is a Veteran SaveTS: Credits – BeginTS: Property Tax Credit/Deduction - BeginHint: Property Taxes Paid = $11,000Hint: Taxpayer meets Property Tax Eligibility RequirementsHint: TP was a Homeowner in 2017Hint: 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

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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 SheetG Note 5 | Left Menu – e-file –  | TS – Clear up any diagnostic messages (if any)TS: Select Federal Return Type “E:file: Mail Payment” 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: Mail Payment” 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

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