Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. Andrea paid $1,000.00/month rent for the current tax year.
2. Andrea paid $167 in student loan interest in the current tax year

# Documents:

Step 1 Basic Information

| TP Form / Note | TS Screen | Notes |
| --- | --- | --- |
| SS Card | Start a New 2018 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? | TS Answer: Filing Status: Single”TS: “Continue” |
| SS Card Intake SheetG-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-00-0752TS: Birth date can be entered using drop down menu or filling in the field. TS: Check any of the “Check here” questions that apply * There are none

TS: Enter Zip code- TaxSlayer fills in city and state. Correct if requiredTS: Enter New Jersey as the Resident StateTS: “Continue” |
| Intake Sheet | New Jersey ReturnNJ Property Tax Credit or Deduction Do you meet Property Tax Credit or Deduction  Eligibility Requirements? Taxpayer NJ Health Insurance Does the Taxpayer have  Health Insurance?New Jersey Return Select the County or  Municipality of your  current residence | Begin New Jersey ChecklistTS Answer: At this point answer “No”. We will go back and adjust after the Federal Return is complete TS Answer: “Yes”Use “NJ Municipality Code lookup in Tax Prep 4 FreeLeft click in the box. Type in Bergen. Scroll down to BERGEN - -EDGEWATER BOROAt this point just hit ““Continue”” We will go back and adjust after the Federal Return is complete  |
|  | Dependents or Qualifying Child InformationDo 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-2Billings Market | Left Menu – Federal Section IncomeWages & Salaries Form W-2 Begin Complete W-2 Information- | Hint: Make corrections so that information matches the information on the paper W-2. * TP address shown on the TS W-2 should match the paper W-2
* If the name and address of the employer come up after inputting the employer Identification Number, check that the information matcher the paper W-2

Hint: Always round up for cents amounts ending in .50 or enter cents and TS will round it for you.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 correctTS: “Continue” |



**Federal AGI: 26,298 Federal Refund: 1,077 NJ Refund Amount: 29**

Step 3 Interest 1099-INT

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| **TP Form / Note** | **TS Screen** | Notes |
| 1099-INTBig City Bank | IncomeInterest and Dividends Form 1099-INT/ 1099-DIV- BeginInterest or Dividend Income -BeginInterest Income, Form 1099-INTContinue | Hint: Select for TaxpayerEnter values that apply.Hint: It is not required to enter the EIN and address. ““Continue”” |



**Federal AGI: 27,231** **Federal Refund: 963 NJ Refund Amount: 12**

Step 4 Student Loan Interest

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| **TP Form / Note** | **TS Screen** | **Notes** |
| I-Note 2 | Left MenuFederal Section – DeductionsEnter MyselfAdjustments - BeginStudent Loan Interest Deduction - Begin | Enter Student Loan Interest Amount“Continue”  |

Andrea paid $167 in student loan interest in the current tax year

**Federal AGI: 27,064 Federal Refund: 981 NJ Refund Amount: 12**

Step 5 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 ADD SALES TAX WORKSHEET and enter ZIP Code and 365 days living in NJ “Continue””  |

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**Federal AGI: 27,064 Federal Refund: 981 NJ Refund Amount: 12**

Step 6 Compare Standard vs Itemized Deductions

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| **TP Form / Note** | **TS Screen** | **Notes** |
|  | Federal SectionDeductionsEnter MyselfCompare Deductions - Begin | TS: Check to see if using itemized or standard deductions.  Itemized = $587 Std = $12,000Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. “Continue” |

**Federal AGI: 27,064 Federal Refund: 981 NJ Refund Amount: 12**

Step 7 Health Insurance

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| **TP Form / Note** | **TS Screen** | **Notes** |
| G-Note 2 | Left Menu-Health Insurance**Health Insurance Questionnaire**Did you or your family have health insurance or qualify for a coverage exemption at any time in 2018?Did you purchase insurance via HealthCare.gov of a State Marketplace?**Verify Your Household Members****Months Insured**Was your entire household covered by qualifying health care coverage or a coverage exemption that covered 2018 or a combination of qualifying health care coverage and coverage exemptions for every month of 2018? | Answer questions in the Health Insurance SectionTS – Yes“Continue”TS – No“Continue”TS – Always select ““Continue””TS-Yes“Continue” |

Andrea had health insurance that met Minimum Essential Coverage rules for the entire year. She did not purchase it through the marketplace.

**Federal AGI: 27,064 Federal Refund: 981 NJ Refund Amount: 12**

Step 8 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 - EditCredits* Property Tax Credit/Deduction-Begin
 | Hint: Use the NJ Checklist to enter NJ itemsTS: Complete Basic Information. Hint: Gubernatorial Election Fund: Andrea -No“Save”Hint: Taxpayer meets Property Tax Eligibility RequirementsHint: Use scratch pad at TP4F to determine the proper value for Property Tax Paid* Hint: Property Taxes Paid = (rent\*.18) . (12,000\*.18) = $2,160

Hint: Taxpayer was not a homeowner in 2018Save 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 she did not pay use tax.

**Federal AGI: 27,064 Federal Refund: 981 NJ Refund Amount: 62**

 Step 14 Prepare for e-file

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| Intake SheetG Note 5 | Left Menu – e-file – Federal Return TypeFeesState Return TypeThird Party Designee InfoConsent to DiscloseQuestionsTaxpayer ID Information | TS – Clear up any diagnostic messages (if any)TS: Select “E:file: Paper Check” NextTS: No entries in Fees section except for Client email address  NextTS: Select State Refund Type “E:file: Paper Check” NextTS: Skip Third Party Designee. It is Out of Scope for us. NextTS: Consent to Disclose Tax Return Information – Check GRANT and enter 5 digit pin (any 5 digit number) and date for TP. NextTS – Questions – Answer questions from Intake sheet Part VII, lines 5.6,7 and 8* Assume taxpayer was present

 NextTS: Skip TP ID Information Screen. Not required for NJ. SaveYou are Done |

She wants to handle any state refund / amount due like their federal refund / amount due.

**Federal AGI: 27,064 Federal Refund: 981 NJ Refund Amount: 62**