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 (6.625% in 2018) would have been $99.38



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? | Answer: Filing Status: Married filing jointContinue |
| SS Card Intake SheetG-Note 2 | 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 * None

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: : New Jersey automatically populates as the Resident StateTS: “Continue” |
| Intake SheetG-Note 2 | 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? Does the Spouse have  Health Insurance?New Jersey Return Select the County or  Municipality of your  current residence | Hint: Begin NJ Checklist TS Answer: At this point answer “No”. We will go back and adjust after the Federal Return is complete TS Answer: “Yes”TS Answer: “YesLeft click in the box. Type in Hudson. Scroll down to HUDSON COUNTY- JERSEY CITYAt this point just hit ““Continue”” We will go back and adjust after the Federal Return is complete |
| Intake Sheet.  | Dependents/ Qualifying Person(s) 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 | Left Menu - IncomeWages & Salaries Form W-2 Complete W-2 Information-Begin | Hint: This is Charles Conway’s W-2Hint: Make corrections so that information matches the information on the W-2. * Correct the address of Employee in the TaxSlayer W-2 to match 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: Check boxes 3-7 for correct entriesHint: Always round up for amounts ending in .50 or enter the cents and TaxSlayer will round off for you. Hint: 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 wagesNote: The difference between Box 1 and Box 16 is not pre tax medical. TS: Click Save & Enter AnotherTS: NJ warning – Check that the amount in box 16 is correct. If yes.“ Continue” |



  **Federal AGI: 32,867** **Federal Refund: 4,112 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: This W-2 is for CarolHint: Make corrections so that information matches the information on the paper W-2Hint: 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 continueTS: Click Continue  |



**Federal AGI: 53,043 Federal Refund: 2,698 NJ Refund Amount: 578**

Step 4 Interest 1099-INT

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| **TP Form / Note** | **TS Screen** | Notes |
| 1099-INTPNC Bank | Left Menu - IncomeInterest and Dividend Income, Form 1099-INT/ 1099-DIV - BeginInterest or Dividend Income -BeginInterest Income, Form 1099-INT  “Continue”” | Hint: Interest is for TaxpayerEnter values that applyHint: It is not required to enter the EIN and address “Continue” |



**Federal AGI: 53,254 Federal Refund: 2,668 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: 2,372 NJ Refund Amount: 573**

Step 6 Itemized Deductions – Taxes You Paid

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| TP Form / Note | TS Screen | Notes |
|  I- Note 1 | Left Menu - Federal Section -Deductions Enter Myself Itemized Deductions - BeginTaxes You Paid - Begin | TS: Go to ADD SALES TAX WORKSHEET and enter ZIP Code and 365 days living in NJ ““Continue” |

**Federal AGI: 63,114 Federal Refund: 2,372 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 = 1,802 Std = 24,000Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. Continue  |

**Federal AGI: 63,114 Federal Refund: 2,372 NJ Refund Amount: 573**

Step 8 Health Insurance

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| TP Form / Note | TS Screen | Notes |
| G-Note 2Intake Sheet | 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” |

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: 2,372 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 –Edit Basic Information -EditCredits - Begin* ` PropertyTax Credit/Deduction - Begin

Tax -Begin* Use Tax on Out of State Purchase
 | Hint: Use the NJ Checklist to enter NJ itemsTS: Complete Basic Information Hint: Gubernatorial Election Fund: Charles and Carol are 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)
* [(2000x9)+ (1000x3)]x.18= 3,780
* Taxpayer was not a homeowner in 2018

“SAVE” –“ SAVE”Hint: Use scratch pad to determine Use tax on TV purchase = $99.38Save back to the beginning of the State Return |

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.

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**Federal AGI: 63,114 Federal Refund: 2,372 NJ Refund Amount: 553**

Step 10 Prepare for e-file

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| Intake SheetG Note 5 | Left Menu – e-file – Federal Return TypeFeesState Return TypeBank AccountsThird Party Designee InfoConsent to DiscloseQuestionsTaxpayer ID Information | TS – Clear up any diagnostic messages (if any)TS: Select “E:file: Direct Deposit” “Next”TS: No entries in Fees section except for Client email address  “Next”TS: Select State Refund Type “E:file: Direct Deposit” “Next”TS: Enter Bank Information – * Account Type - Checking
* Name of Bank not required.
* Deposit amount is required. Click “PULL REFUND”
* Enter Routing and Account numbers twice

 “ Next”TS: 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 and SP Next”TS – Questions – Answer questions from Intake sheet Part VII, lines 5.6,7 and 8* Assume taxpayer was present

 “Next”TS: Skip TP ID Information Screen. Not required for NJ. “SAVE”You 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: 2,372 NJ Refund Amount: 553**