**Interview Notes**

**Single Taxpayer (Tom Andrews)**

**The following information was revealed in the interview with the taxpayer. It is not necessarily accurately reflected on the Intake/Interview Sheet. Make any necessary corrections and annotations on the Intake Sheet to reflect this data.**

* Andrew did not bring his last year’s return. He says things were pretty much the same as this year. He did not itemize last year.
* The mailing address on the driver’s license and the intake sheet do not match. Tom says he has recently moved and would like any IRS correspondence sent to the address on the Intake Sheet.
* Tom did not answer the question regarding identity theft. He responds that last year someone stole his credit card and used it to make several purchases. After discussing the situation, Tom believes that his SSN was not compromised, and he does not believe anyone could file a tax return using his name and SSN. Tom has not requested an Identity Protection (IP) PIN from the IRS.
* Tom listed Scott Davis as a person who lived with him last year. In response to questions: Scott is Tom’s roommate. He lives in a separate room in the house and shares household expenses. He is a full-time employee at a local business.
* Tom’s answer on the Intake Sheet says he did not receive a refund of state/local income taxes. You look online and find that he did get a refund of $275. Tom did not itemize in 2018.
* Tom was able to log into his NJ unemployment account and got the following information:
	+ - EIN = 22-2481818
		- New Jersey Department of Labor, PO Box 908, Trenton, NJ 08625
		- Unemployment Compensation Box 1 = $675
		- Federal Income Tax Withheld Box 4 = $70
* Tom marked UNSURE about rental property income. In response to your questions, Tom says that Scott pays him $300 per month for his share of the rent.
* Tom marked YES for other income and wrote “Travel Expenses”. In response to your questions, Tom responds that his employer paid him $250 to reimburse him for out-of-pocket expenses when he was sent out of town to do some computer repairs for another company.
* Under expenses Tom marked YES for contributions to a retirement account. Upon questioning Tom reports that he sent $100 per month to his personal IRA, a traditional IRA (not Roth).
* Tom misunderstood the question about college expenses. He thought that college expenses included paying his student loan.
* Tom tells you he paid out of pocket $745 in medical expenses for dental work. He did not use the company-offered Flexible Savings Account to pay for any of these medical expenses. Tom donated $100 to United Fund last year.
* Tom marked UNSURE for having a health savings account (HSA). Upon questioning, he responds that his employer allows him to put part of his salary into an account to pay for medical expenses, but he did not have any money put into that account last year and paid for his unreimbursed medical expenses out of pocket.
* Tom did not make estimated tax payments or apply last year’s refund to this year’s tax for either Federal or NJ.
* Tom had health insurance coverage all year, except for the two months (July and August) he was laid off from his job.
* Tom would like his answers to the following NJ questions to be the same as his federal:
	+ NJ Gubernatorial Election Fund
	+ Direct deposit
	+ Direct debit
* Tom said that no one in his family had a disability.
* Tom is a veteran. He did not serve in a combat zone during the current tax year. He qualifies as a veteran for the NJ 1040 Veteran’s Exemption.
* Tom paid rent of $300 a month for all 12 months of last year.
* Tom did not make any out-of-state purchases.

**REFUND MONITOR**

After you complete the Personal Information section, TaxSlayer will start a NJ return by asking you some NJ questions. At this point, answer “NO” to the “Do you meet Property Tax Credit or Deduction Eligibility Requirements?” Only answer the rest of the questions up to and including the municipal code. Then select “Coninue.” Enter all the Federal data, completing the NJ Checklist as you do so. Then go back to the NJ State section to update the property tax question as needed and to enter all the other NJ items from the Checklist.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Step** |  | **Federal AGI** | **Federal Refund** | **NJ Refund** |
| 1 | W-2 Marc Tecktronics | 29,657 | 569 | 333 |
| 2 | Unemployment Compensation | 30,332 | 561 | 333 |
| 3 | Interest – Nations Bank | 30,674 | 519 | 333 |
| 4 | NJ Tax Refund | 30,674 | 519 | 333 |
| 5 | Student Loan Interest – People Federal Bank | 30,024 | 597 | 333 |
| 6 | IRA Deduction | 28,824 | 861 | 333 |
| 7 | Medical – Schedule A | 28,824 | 861 | 336 |
| 8 | Charitable Contributions – Schedule A | 28,824 | 861 | 336 |
| 9 | Health Insurance | 28,824 | 861 | 336 |
| 10 | NJ Return – Veteran Deduction | 28,824 | 861 | 388 |
| 11 | NJ Return – Property Tax Deduction/Credit | 28,824 | 861 | 438 |
| 12 | E-file | 28,824 | 861 | 438 |