Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. George was a full-time student at a local college
2. Neither George nor Susan made over $4,150 in TY 2018
3. Neither George nor Susan qualified for a “Multiple Support Declaration”
4. Mary paid $144 in Student Loan interest during the tax year
5. The Browns paid $9,000 in rent while living in Dover through June (They had lived at the Dover address for many years)
6. The Browns moved in July when they inherited a house in Denville. They paid $4,534 in property taxes but had no mortgage payments. According to the postcard from the tax office: – Block=50001, Lot=00002, Qualifier is blank.
7. Henry started receiving his pension from Fidelity this year
8. Neither Henry nor Mary are Veterans.
9. The Browns filed for and are eligible for a Homestead Benefit property tax credit
10. The Browns all had health insurance for the entire tax year





Step 1 Basic Information

| **TP Form / Note** | **TS Screen** | **Notes** |
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| SS Card | Start a New 2018 Tax ReturnAvailable Taxpayer Profiles | TS: Ignore the ProfilesTS: Select “Enter Social Security Number” at the bottom of the screenTS: Enter the TP SSN twice and “Start Return” |
| Intake Sheet | What is your filing Status? | TS Answer: Filing Status: Married filing jointTS: “Continue” |
| 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 – * TS- Check presidential election campaign fund for SP

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” |
|   I–Note 6 &10 | 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: “Yes”Use “NJ Municipality Code lookup in Tax Prep 4 FreeLeft click in the box. Type in Morris. Scroll down to MORRIS COUNTY-DENVILLE TWPAt this point just hit ““Continue”” We will go back and adjust after the Federal Return is complete  |
| I-Note 1 | Dependents or Qualifying Person(s)Do you have any dependents or qualifying person(s) to claim on your return? | TS: Select Yes |
| Intake Sheet, SS CardI-Note 1,2,3 | Dependent/Qualifying Child Information | Add dependent informationHint: Use name and SSN from SS card (Not Intake Sheet)TS: Last name auto populates. Change if requiredAnswer: SSN format = YYY-00-0752TS: Check the “Check All That Apply” questions that apply* Hint: Both dependents are U.S Citizens and full-time students, but only George is over 18 and a full-time student at an eligible educational institution

TS: Add second dependent informationHint: Susan’s last name is Cox. Make the change.TS: Select ““Continue””, ““Continue””, ““Continue”” |

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

Step 2 SSA-1099

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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 | TS: Enter SSA-1099 Data Hint: Use TP4F Scratch Pad to document Medicare Parts B, C, D. Insert total in “Taxpayer’s Medicare Premiums”. Amount = $1,889TS: ““Continue””, ““Continue”” |



**Federal AGI: 0 Federal Refund: 1,333 NJ Refund Amount: 0**

Step 3 W-2 Green Grass Golf

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| W-2Green Grass Golf | Left Menu - IncomeWages & Salaries Form W-2 Complete W-2 Information-Begin | Hint: This is Henry Brown’s W-2Hint: 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: Click Save & Enter Another |



 **Federal AGI: 15,100** **Federal Refund: 8,024 NJ Refund Amount: 2,365**

Step 4 W-2 Joe’s Bar & Grill

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| **TP Form / Note** | **TS Screen** | Notes |
| W-2 Joe’s Bar & Grill | Add W-2 Statement | Hint: This is Mary Brown’s W-2Hint: 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
	+ Mary’s address on the paper W-2 differs from the electronic W-2. Make the correction
* 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
* Check boxes 3-7 for correct entries

TS: Certain characters are not allowed for E-File (#, ‘). TS will remove them once the form is savedTS: 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 “Continue”TS: Warning Message: Be sure the numbers entered are the numbers on the TaxSlayer W-2. Click on “Cancel”, check numbers, click “Continue” and then click ““Continue”” on the message.  |



 **Federal AGI: 41,335 Federal Refund: 5,446 NJ Refund Amount: 908**

Step 5 Interest 1099-INT

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



**Federal AGI: 41,754 Federal Refund: 5,306 NJ Refund Amount: 867**

Step 6 Dividends 1099-DIV

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| **TP Form / Note** | **TS Screen** | Notes |
| 1099-DIVDreyfus | Add an Interest and DividendsDividend Income, Form 1099-DIV“Continue” | Hint: Select for TaxpayerEnter values that apply“Continue” |



**Federal AGI: 43,105 Federal Refund: 4,962 NJ Refund Amount: 747**

Step 7 1099-R

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| **TP Form / Note** | **TS Screen** | Notes |
| 1099-RFidelity Investments | Left Menu -Federal Section- IncomeIRA/Pension Distribution Form 1099-R / RBA, SSA – EditAdd or edit a 1099-R-Begin | Hint: “This 1099-R is for HenryHint: Make corrections so that information matches the information on the 1099-RHint: Taxable amount defaults to Gross Distribution Amount. Adjust as required. TS: You do not have to select a State for income to go to the State return.TS: “Continue”  |



**Federal AGI: 51,377 Federal Refund: 2,769 NJ Refund Amount: 104**

Step 8 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 Mary BrownHint: Phone number not requiredHint: State information not required“Continue” |



 **Federal AGI: 58,904 Federal Refund: 2,433 NJ Refund Amount: 95**

Step 9 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”  |

 Mary paid $144 in Student Loan interest during the tax year

**Federal AGI: 58,760 Federal Refund: 2,451 NJ Refund Amount: 95**

Step 10 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 NJTS: Enter real estate taxes paid ““Continue””  |

The Browns moved in July when they inherited a house in Denville. They paid $4,534 in property taxes but had no mortgage payments.

**Federal AGI: 58,760 Federal Refund: 2,451 NJ Refund Amount: 95**

Step 11 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 = 5,393 Std = 25,300Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. “Continue”  |

**Federal AGI: 58,760 Federal Refund: 2,451 NJ Refund Amount: 95**

Step 12 Health Insurance

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| **TP Form / Note** | **TS Screen** | **Notes** |
| G-Note 2I-Note 10 | 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?“Continue”Did you purchase insurance via HealthCare.gov of a State Marketplace?“Continue”**Verify Your Household Members**“Continue”**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 – YesTS – NoTS – 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: 58,760 Federal Refund: 2,451 NJ Refund Amount: 95**

Step 13 New Jersey Return

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| **TP Form / Note** | **TS Screen** | **Notes** |
| I-Note 1,5,6,8,9,10G-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: George is attending college, but he is not under 22 years of age. Hint: Gubernatorial Election Fund: Henry – No, Mary - YesSaveHint: 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) + Property taxes paid (9,000\*.18) + 4,534 = $6,154

Hint: Taxpayer was a homeowner in 2018Hint: Brown filed for homestead benefit Hint: Enter the Block and Lot numbersHint: County Property Located in Denville.Save back to the beginning of the State Return |

The Browns paid $9,000 in rent while living in Dover through June (They had lived at the Dover address for many years)

The Browns moved in July when they inherited a house in Denville. They paid $4,534 in property taxes but had no mortgage payments. According to the postcard from the tax office: – Block=50001, Lot=0002, Qualifier is blank.

The Browns filed for and are eligible for a Homestead Benefit property tax credit

County Property located in: Morris-Denville

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

**Federal AGI: 58,760 Federal Refund: 2,451 NJ Refund Amount: 202**

 Step 14 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” NextTS: No entries in Fees section except for Client email address  NextTS: Select State Refund Type “E:file: Direct Deposit” NextTS: Enter Bank Information – * Account Type - Checking
* Name of Bank not required.
* Deposit amount is required. Click “PULL REFUND”
* Enter Routing and Account numbers twice

 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 and SP 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 |

They want to handle any state refund / amount due like their federal refund / amount due



**Federal AGI: 58,760 Federal Refund: 2,451 NJ Refund Amount: 202**