Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. 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

2. They do not have a Mortgage.

3. Troy McCook is a Veteran

4. Robert McCook is still in High School.

# 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? | 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* Check presidential election campaign fund for Spouse

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: “Yes”Use “NJ Municipality Code lookup in Tax Prep 4 FreeLeft click in the box. Type in Passaic. Scroll down to PASSAIC – PATERSON 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 “Yes”. |
| I-Note 4 | 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-00-0752TS: Was this person a U.S. citizen, U.S. national, or U.S. resident alien? (See Pub. 519 for the definition of a U.S. national or U.S. resident alien) If they were not, you can’t claim the child tax credit or the credit for other dependents for this person. \** Answer Yes

Check the “Check all that apply” questions that apply* 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 for TP and SPHint: 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-Continue | Hint: Select for TaxpayerHint: Payer’s EIN and address is not requiredEnter values that apply“Continue” |



**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: 1,671 NJ Refund Amount: 0**

Step 5 1099-R Phoenix

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| **TP Form / Note** | **TS Screen** | Notes |
| 1099-RPhoenix Investments | Add a form 1099-R/Pension Distribution | 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: 1,671 NJ Refund Amount: 0**

**Step 6 Itemized Deductions – Taxes You Paid**

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| TP Form / Note | TS Screen | Notes |
| I-Note 1 &2 | 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: Continue - ContinueTS: Enter real estate taxes paid“Continue” |

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: 1,671 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 = 10,000 (taxes are capped at $10,000) Std = 26,600Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. “Continue” |

**Federal AGI: 76,268 Federal Refund: 1,671 NJ Refund Amount: 0**

**Step 8 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” |

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: 1,671 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 –Edit Basic Information - EditCredits - Begin* Property Tax Credit/Deduction-Begin
 | Hint: Use the NJ Checklist to enter NJ itemsTS: Check Basic Information – * Dependent is covered by health insurance
* TP is a Veteran
* Gubernatorial Election Fund: Troy – No, Yvonne - Yes

SaveHint: Taxpayer meets Property Tax Eligibility RequirementsHint: Property Taxes Paid = $11,000Hint: TP was a Homeowner in 2018Hint: They were eligible and filed for homestead benefit Hint: County Property located in: Passaic County-Paterson City Save back to the beginning of the State Return |

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

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

**Federal AGI: 76,268 Federal Refund: 1,671 NJ Refund Amount: 0**

Step 10 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 Federal Return Type “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 and SP NextTS – 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. SaveYou are Done |

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

**Federal AGI: 76,268 Federal Refund: 1,671 NJ Refund Amount: 0**