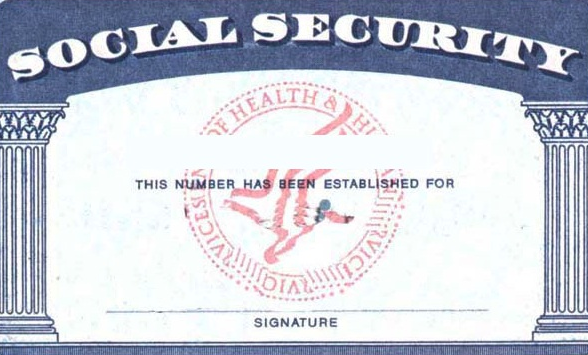
Step 0 Intake + Interview 🡺 Filing Status, Dependency

# Interview Notes: (See also: General Notes)

1. Shirley worked part time to earn spending money.
2. Shirley is single and living with her parents while she attends college full time.
3. Shirley is totally supported by her parents and her parents will claim her as a dependent on their return.

# Documents:



731-xx-yyyy

Shirley A Gallo

Shirley A Gallo

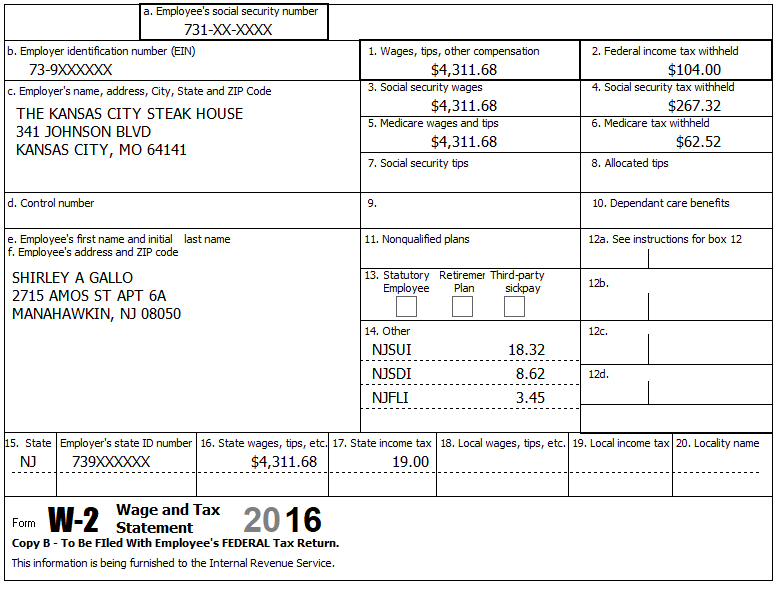
Step 1 Basic Information

| TP Form / Note | TS Screen | Notes |
| --- | --- | --- |
|  | Basic Information – Filing Status |  |
| Intake Sheet | What is your filing Status? | Select Filing status from drop down.  Answer: Filing Status: Single  Continue |
| SS Card  Intake Sheet  I-Notes 2,3 | Personal Information  Taxpayer Information  Address & Phone Number | Hint: Use Name and SSN from SS card. (Not Intake Sheet)  Hint: SSN format YYY-00-0752  TS: Birth date can be entered using drop down menu or filling in the field.  TS: Check any of the “Check here” questions that apply:   * Claimed as a dependent on someone else’s return * Over 18 and full time student   TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required  Hint: Did you enter the apt. number?  TS: Enter New Jersey as the Resident State  TS: Select Continue |
| Intake Sheet  G-Note 3 | Just a Few More Questions (NJ Info) | TS: Select Municipality from drop down menu (Listed by county). Use Municipality Lookup on TPFF to find out township and county for Manahawkin.  Answer: Manahawkin is in Ocean County and Stafford Township.  Start typing Ocean to quickly scroll down.  TS: Select Yes or No for the Gubernatorial Election Fund. See Intake Sheet page 3 and General Note 3.  Answer: Yes for TP,  TS: Enter Five Digit Pin for TP and SP. Any 5-digit number.  TS: Select Continue |
|  | Dependents/ Qualifying Person  Do you have any Dependents or Qualifying Person(s) to claim on your return? | TS:  Answer is “No” |

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

Step 2 W-2 The Kansas City Steak House

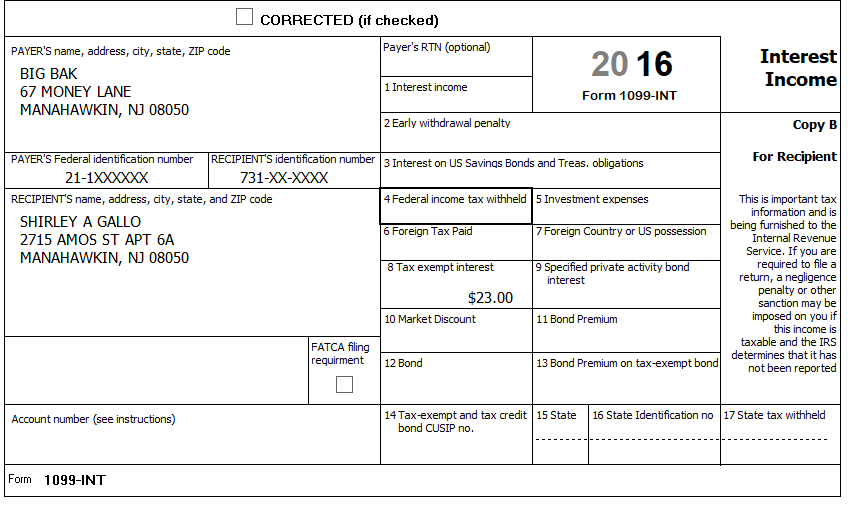
|  |  |  |
| --- | --- | --- |
| W-2  The Kansas City Steak House | Left Menu - Federal Section  Enter Myself  Income  Wages & Salaries Form W-2  Begin | Hint: Make corrections so that information matches the information on the W-2  Hint: Add Apt 6A to address.  Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct  Hint: Always round up for amounts ending in --.50  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 correct  TS: Click continue NJ warning  TS: Click Continue back to income |



**Federal Refund: 104 NJ Refund Amount: 19**

Step 3 Interest 1099-INT

|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| 1099-INT  Big City Bank | Interest or Dividend Income  Interest Income, Form 1099-INT/ 1099-DIV- Begin  Interest or Dividend Income -Begin  Tax Exempt Interest Income, Form 1099-INT, Box 8………..  Continue | Enter values that apply  Hint: Since the interest is tax exempt both Federal and State, there is no adjustment required for the State.  Continue - |





**The tax exempt interest received was from a NJ Turnpike Bond and it is tax exempt in NJ.**

**Federal Refund: 104 NJ Refund Amount: 19**

**Step 4 Federal Deductions, Adjustments & Credits**

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
|  | Left Menu - Federal Section  Deductions  Enter Myself  Itemized Deductions  Taxes You Paid - Begin | TS: Go to the Add Sales Tax Worksheet and enter NJ, Zip Code, and 366 days living in the state  Continue back to Health Insurance |
|  | -Compare Standard vs Itemized Deductions  Left Menu - Federal Section  Deductions  Enter Myself  Compare Deductions - Begin | Check to see if using itemized deductions or standard deductions.  Itemized =49  Std = 4,662  Continue |

**Federal Refund: 104 NJ Refund Amount: 19**

Step 5 Health Insurance

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| G-Note 2 | Left Menu-Health Insurance  Start Questionnaire | Hint: Parents are responsible for her health insurance. Select “Skip Health Insurance”. |

Shirley is totally supported by her parents and her parents will claim her as a dependent on their return.

**Federal Refund: 104 NJ Refund Amount: 19**

Step 6 New Jersey Return

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| I-Note 2,3  G-Note 2,3,4 | State Return –Edit  Enter Myself  Basic Information | Hint: Use the NJ Checklist to enter NJ items  HINT: Check Basic Information – Default values will not appear as selected  Hint: No other inputs are required for NJ. TP does not pay rent  Continue back to the beginning of the State Return |

**Federal Refund: 104 NJ Refund Amount: 19**

**Step 7 Prepare for e-file**

|  |  |  |
| --- | --- | --- |
| Intake Sheet  Supplemental Intake Sheet  G Note 5 | Left Menu – e-file – | TS: Clear up any diagnostic messages (if any)  TS: Select Federal Return Type “E:file: Paper Check”  TS: No entries in Fees section except for Client email address  TS – Pin numbers for e-file are automatically selected  TS: Select State Refund Type “E:file: Paper Check”  TS: Skip Third Party Designee Info  TS – Questions – Answer questions from Intake Sheet Part VII, lines 5.6 and 7, Supplemental Intake Sheet,  TS: Skip TP ID Information Screen  Save  You are Done |

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

**Federal Refund: 104 NJ Refund Amount: 19**