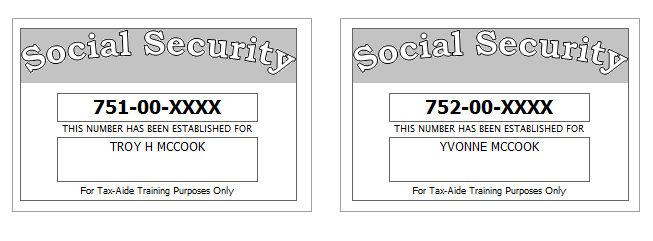
Step 0 Intake + Interview 🡺 Filing Status, Dependency

# 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 do not have a Mortgage.
2. Robert McCook is still in High School.

# Documents:





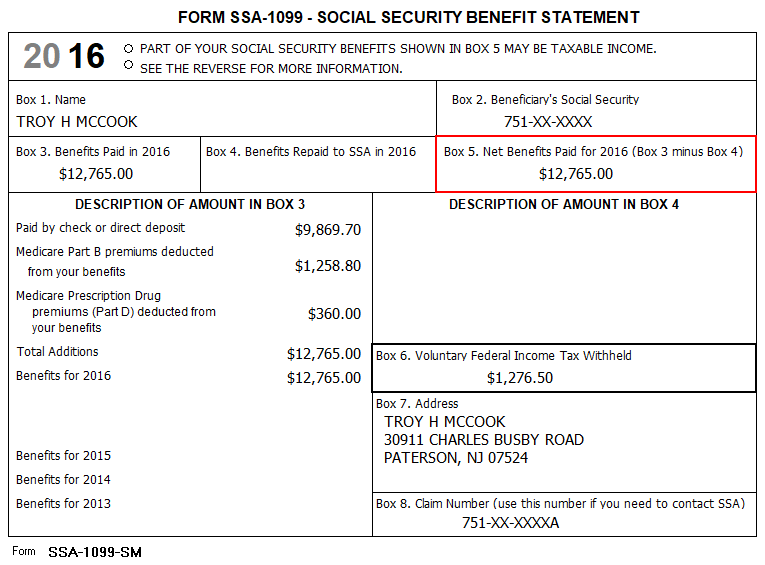
**Step 1 Basic Information**

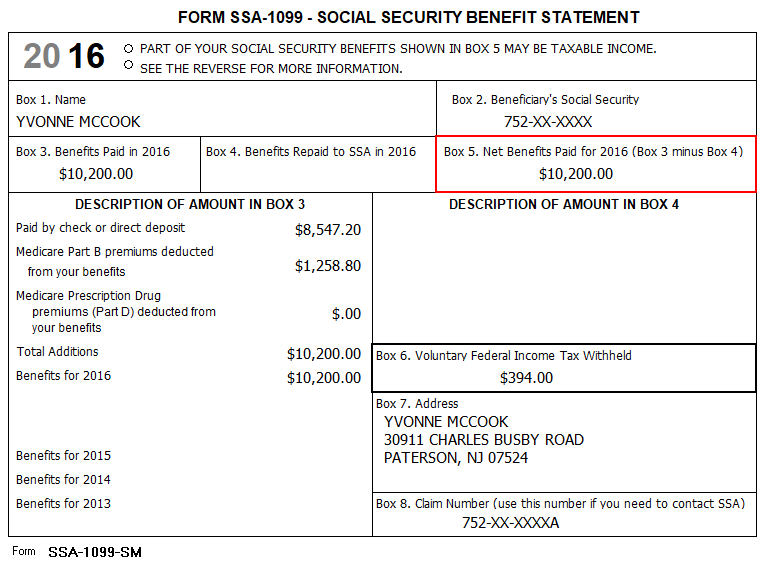
| TP Form / Note | TS Screen | Notes |
| --- | --- | --- |
|  | Basic Information – Filing Status |  |
| Intake Sheet | What is your filing Status? | Select Filing status from drop down.  Answer: Filing Status: Married filing jointly  Continue |
| SS Card  Intake Sheet | Personal Information  Taxpayer Information  Spouse 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 –  Hint: Check here if the Spouse wishes to contribute $3 to the Presidential Election Campaign Fund  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 required  TS: Enter New Jersey as the Resident State  TS: Select Continue |
| Intake Sheet  G-Note 2,3 | Just a Few More Questions (NJ Info) | TS: Select Municipality from drop down menu (Listed by county). Paterson is in Passaic County. Start typing Passaic to quickly scroll down  TS: Answer question regarding dependent Health Insurance. Answer is Yes.  TS: Select Yes or No for the Gubernatorial Election Fund. See Intake Sheet page 3 and General Note 3. Answer: : No for TP, Yes for SP.  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 “Yes”. |
|  | Dependent/Qualifying Child  Information | Add dependent information  Hint: Use name and SSN from SS card (Not Intake Sheet)  Answer: SSN format = YYY-00-0752  Check the “Check if” questions that apply  Continue |

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

Step 2 SSA-1099 Troy & Yvonne McCook

|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| SSA-1099 | Federal Section  Let’s look at the money You earned – Enter Myself  Income  IRA/Pension Distribution Form 1099-R/RRB/SSA  - Begin  Social Security Benefits/RRB-1099 -Begin | Enter SSA-1099 Data  Hint: Use TP4F Scratch Pad to document Medicare Parts B, C, D. Insert total in “Taxpayer’s Medicare Premiums”. Amount = $1,619  TS: Continue, Continue |

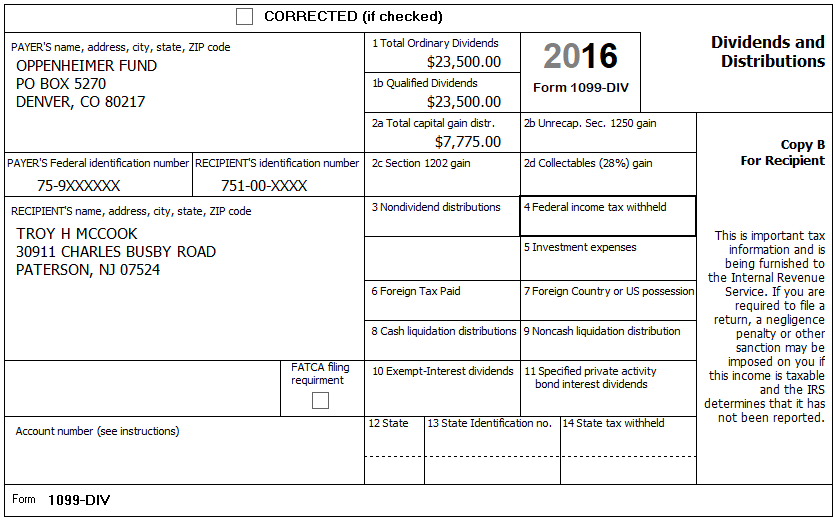




**Federal Refund: 1671 NJ Refund Amount: 0**

**Step 3 Dividends 1099-DIV - Oppenheimer**

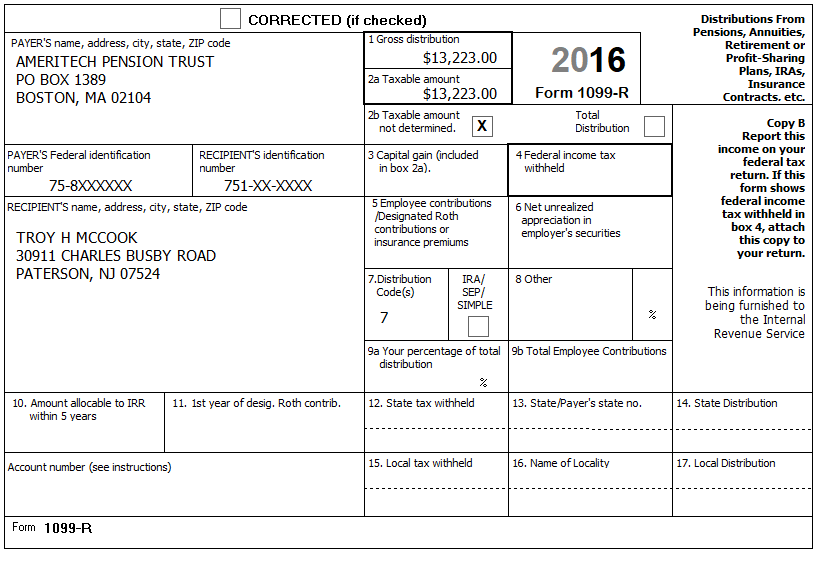
|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| 1099-DIV  Oppenheimer | Interest and Dividends Form 1099-INT/1099-DIV –  Begin  Interest or Dividend Income – Begin  Dividend Income, Form 1099-DIV  Continue | Hint: Select for Taxpayer  Enter values that apply  Continue Until Back to Income |



**Federal Refund: 1,671 NJ Refund Amount: -342**

**Step 4 1099-R Ameritech**

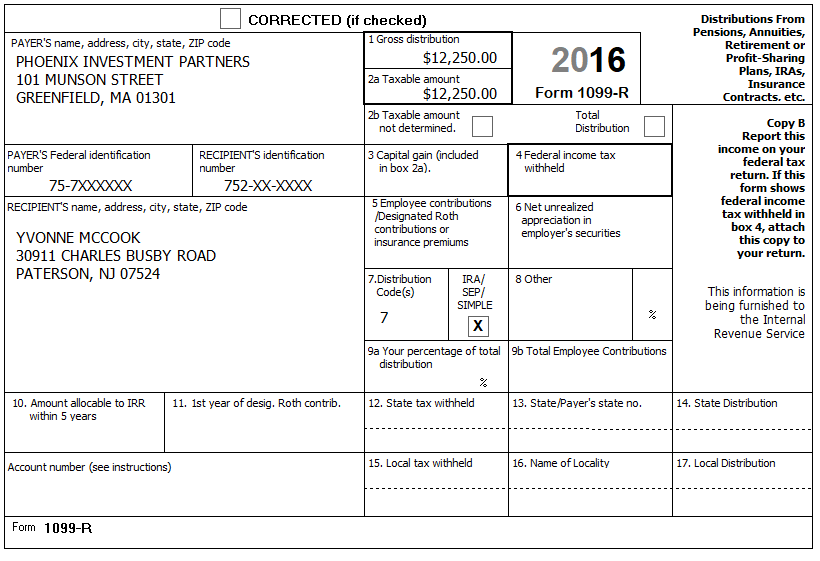
|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| 1099-R  Ameritech | IRA/Pension Distribution Form 1099-R / RBA, SSA – Edit  Add or edit a 1099-R | Hint: “This 1099-R is for Troy  Hint: Make corrections so that information matches the information on the 1099-R  Hint: Taxable amount 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: Continue back to Income |



**Federal Refund: 1,455 NJ Refund Amount: -342**

Step 5 1099-R Phoenix

|  |  |  |
| --- | --- | --- |
| **TP Form / Note** | **TS Screen** | Notes |
| 1099-R  Phoenix Investments | IRA/Pension Distribution Form 1099-R / RBA, SSA – Edit  Add or edit a 1099-R  Add a Form 1099-R IRA/Pension Distribution | Hint: “This 1099-R is for Yvonne  Hint: Make corrections so that information matches the information on the 1099-R  Hint: 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 back to Income |



**Federal Refund: -102 NJ Refund Amount: -440**

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

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| I-Note 4 | Federal Section  Deductions  Enter Myself  Itemized Deductions - Begin  Taxes You Paid - Begin | TS: Go to the Sales Tax Worksheet and enter NJ and 366 days living in NJ  TS: Continue  TS: Enter real estate taxes paid  Continue Until Health Insurance Introduction |

The McCooks own a home. They paid $11,000 in property taxes for the year. They do not have a Mortgage

**Federal Refund: -102 NJ Refund Amount: -440**

**Step 7 Compare Standard vs Itemized Deductions**

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
|  | Federal Section  Deductions  Enter Myself  Compare Deductions - Begin | Check to see if using itemized deductions or standard deductions. Itemized = 11,912  Std = 15100  Continue |

**Federal Refund: -102 NJ Refund Amount: -440**

**Step 8 Health Insurance**

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| G-Note 2 | Left Menu  Health Insurance  Start Questionnaire | Answer questions in the Health Insurance Section |

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 Refund: -102 NJ Refund Amount: -440**

**Step 9 New Jersey Return**

|  |  |  |
| --- | --- | --- |
| TP Form / Note | TS Screen | Notes |
| I-Note 1  G-Note 2,3,4 | State Return –Edit  Enter Myself  Basic Information  Credits   * Property Tax Deduction | Hint: Use the NJ Checklist to enter NJ items  HINT: Check Basic Information – Default values will not appear as selected  Credits  Hint: Use scratch pad at TP4F to determine the proper value for Property Tax Paid  Hint: Property Taxes Paid = $11,000  Hint: Taxpayer meets Property Tax Eligibility Requirements  Hint: TP was a Homeowner in 2016  Hint: County Property located in: Passaic County-Paterson  Continue 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 do not have a Mortgage

**Federal Refund: -102 NJ Refund Amount: -268**

Step 10 Prepare for e-file

|  |  |  |
| --- | --- | --- |
| Intake Sheet  G Note 5 | Left Menu – e-file – | TS – Clear up any diagnostic messages (if any)  TS: Select Federal Return Type “E:file: Mail Payment”  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: Mail Payment”  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 |

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

**Federal Refund: -102 NJ Refund Amount: -268**