**Intake Sheet, page 1, Shaded Area**

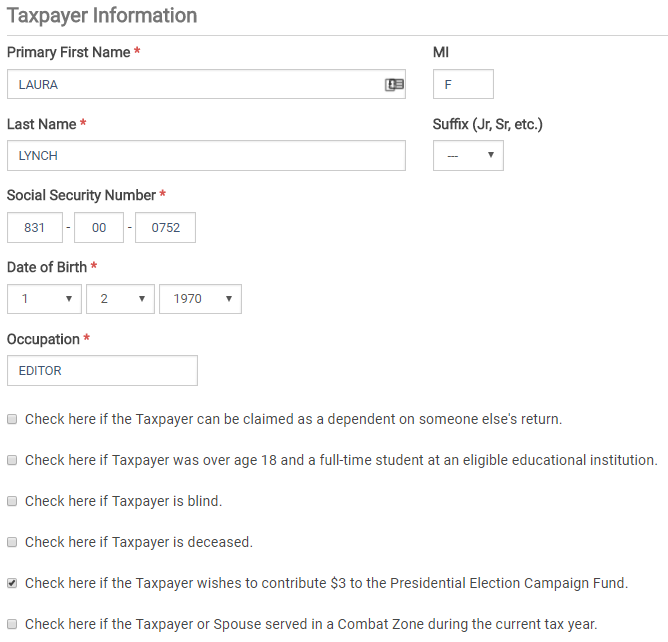
|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| John | 1: Yes | 2: No | 3: Yes | 4: Yes | 5: Yes |
| George | 1: No | 2: No | 3: Yes | 4: Yes | 5: Yes |

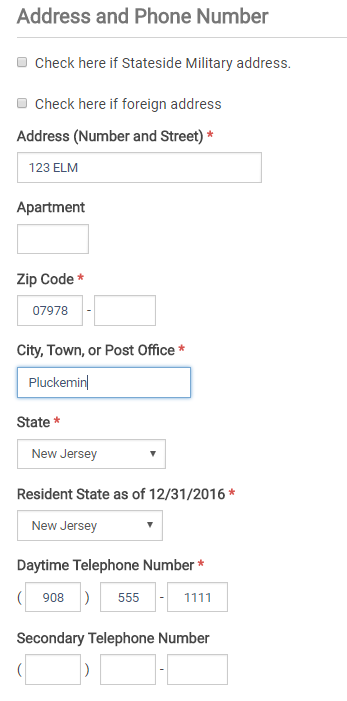
**Filing Status - Head of Household**

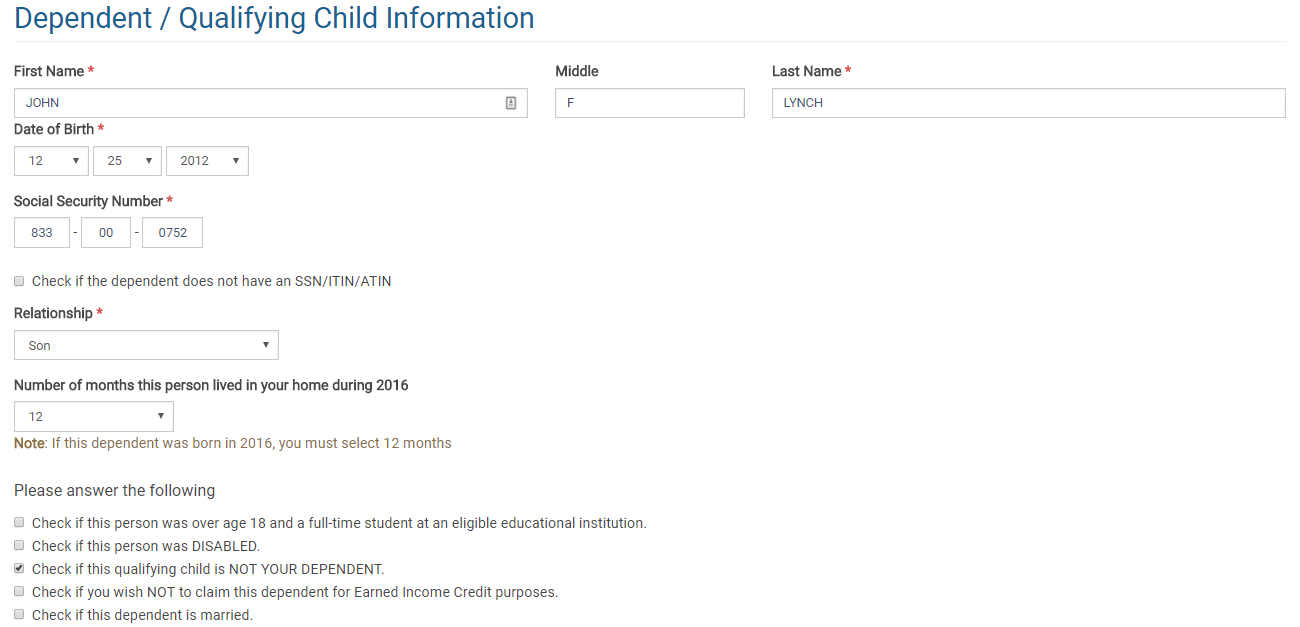
**Federal Refund - $5,894**

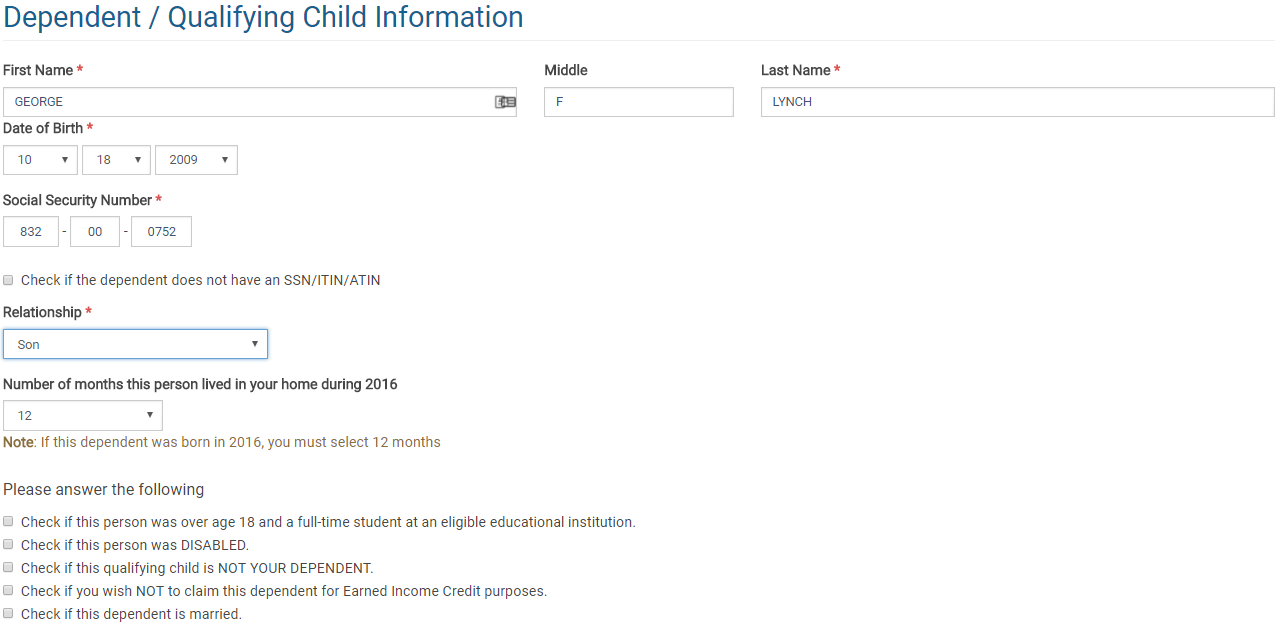
**State Refund – $2,029**

**Basic Information**









**W-2 Wages**

ACME Corp

EIN – includes a number

Check employer name and address

ACME CORP

123 MAIN

PLUCKEMIN

NJ

Box 1 = 14,598

Box 2 = 1,002

Box 3 = 14,598

Box 4 = 905

Box 5 = 14,598

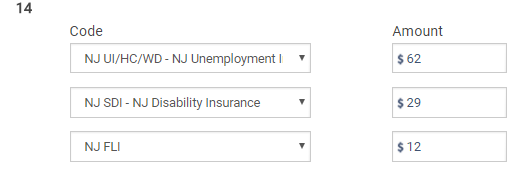
Box 6 = 212

Box 12

Code = DD

Amount = 3,000

Box 14



New Jersey Information

State = New Jersey

EIN = a number is in the box

Box 16 = 14,598

Box 17 = 575

ACME Diner

EIN – includes a number

Check employer name and address

ACME DINER

123 MAIN

PLUCKEMIN

NJ

Box 1 = 2,532

Box 2 = 328

Box 3 = 1,944

Box 4 = 157

Box 5 = 2,532

Box 6 = 37

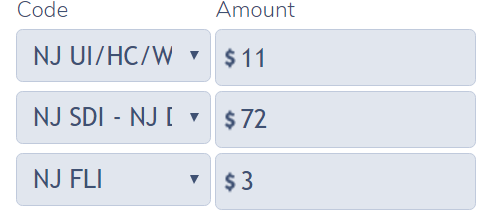
Box 7 = 588

Box 8 = 250

Note: The amount from box 8 automatically goes to Form 4137. You can do a search for the 4137 in

TSO, or view the completed form in the printed return.

Box 14



New Jersey Information

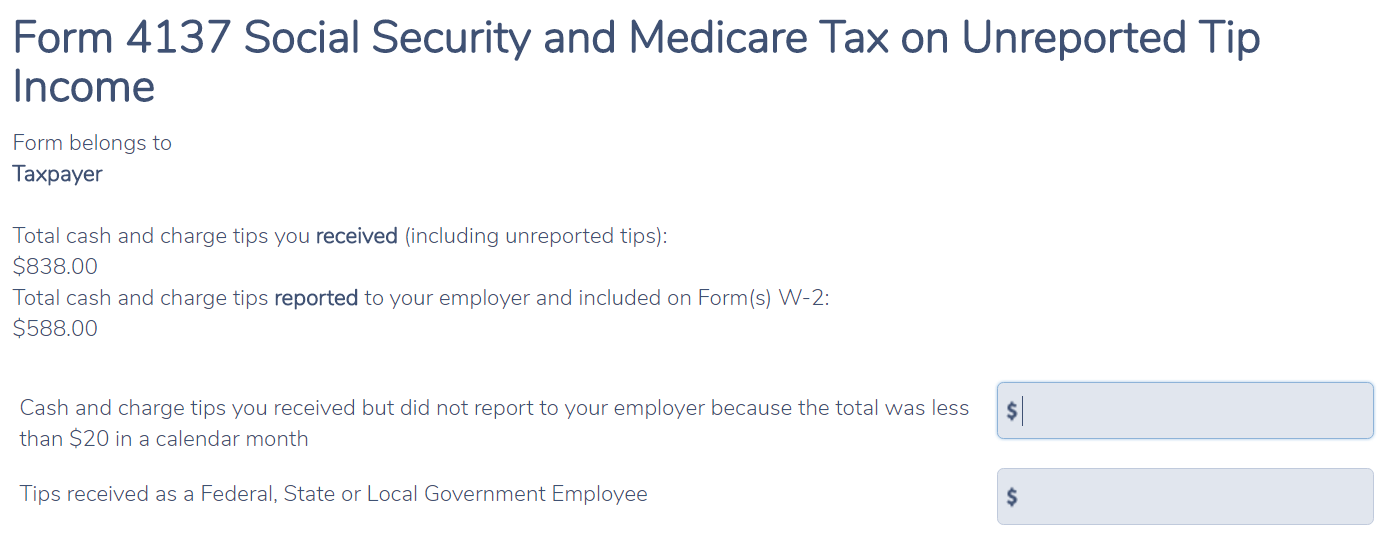
State = New Jersey

EIN = a number is in the box

Box 16 = 2,532

Box 17 = 201

**Form 4137**



**1099-R**

ACME IRAS

EIN – includes a number

Check PAYER’S name and address

ACME IRAS

123 MAIN

PLUCKEMIN

NJ

Box 1 = 5,000

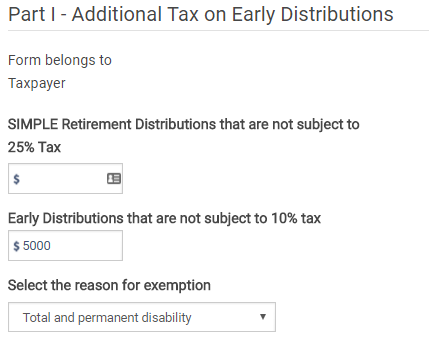
Box 2a = 5,000

Box 4 = 750

Box 7 = 1

IRA/SEP/SIMPLE box checked

**Form 5329**



**1099-R**

ACME Pensions

EIN – includes a number

Check payer’s name and address

ACME PENSIONS

123 MAIN

PLUCKEMIN

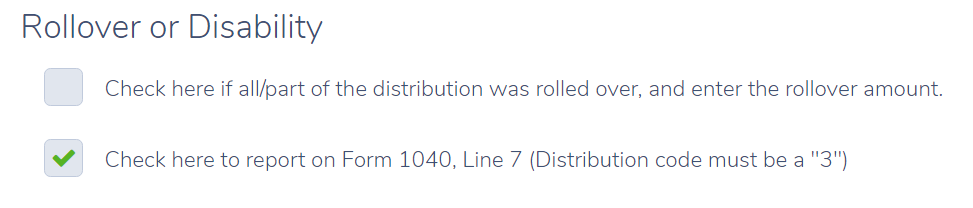
NJ

Box 1 = 5,400

Box 2a = 5,400

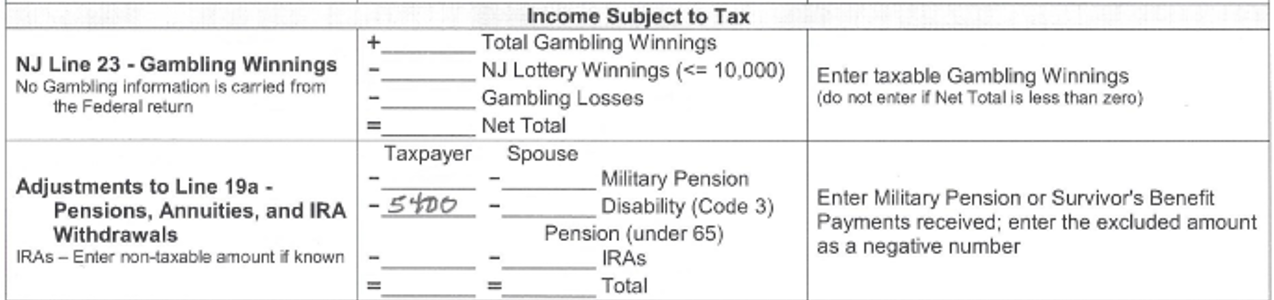
Box 7 = 3

Check that box on 1099-R checked to move amount to 1040 Line 7



NJ Checklist

Amount of the ACME Pensions Disability Pension should be entered on the NJ Checklist in the Income Subject to Tax Section.



**1099-MIsc**

ACME Services

EIN – Check a number is entered

Payer

ACME SERVICES

123 ELM

PLUCKEMIN, NJ

Box 7 = 5,000

ACME Partners

EIN – Check a number is entered

Payer

ACME PARTNERS

123 ELM

PLUCKEMIN, NJ

Box 7 = 7,000

**Schedule C**

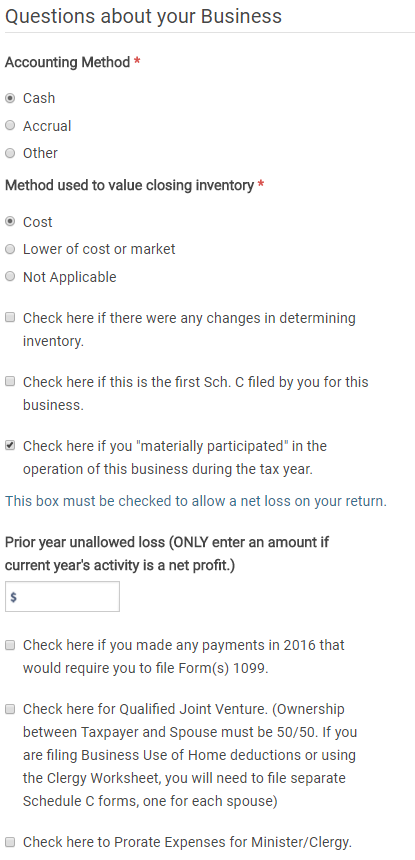
Basic Information

Business Code = 561410

Description of Business = Document preparation

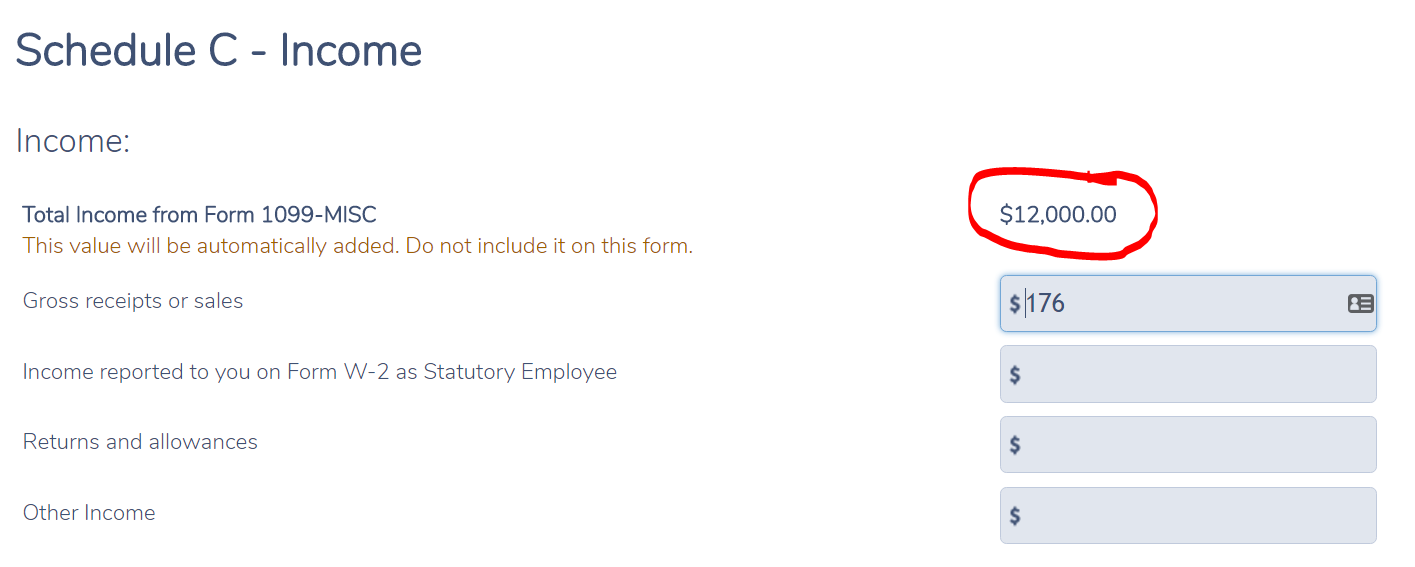
All other lines blank

Questions About Business

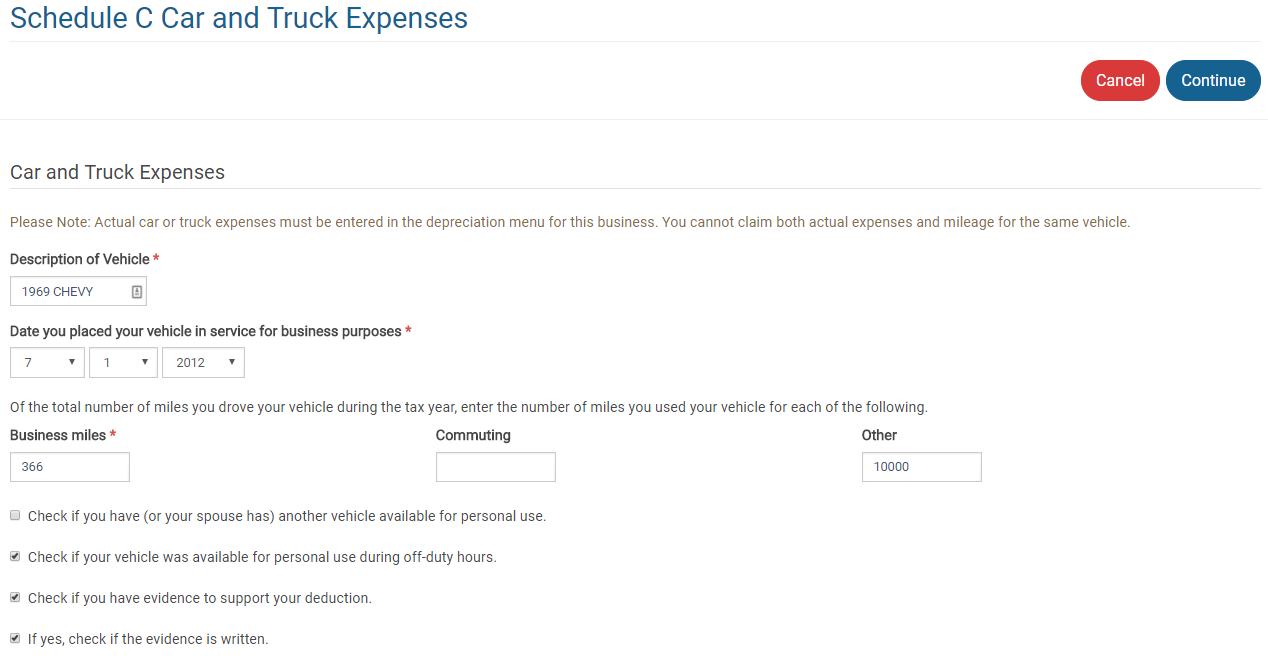


Income

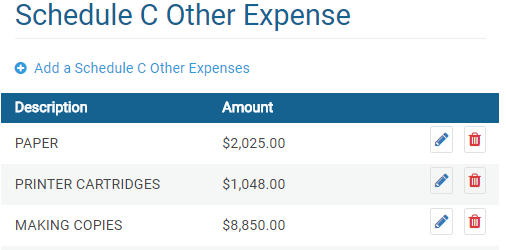
Total amounts from both 1099 MISCs.



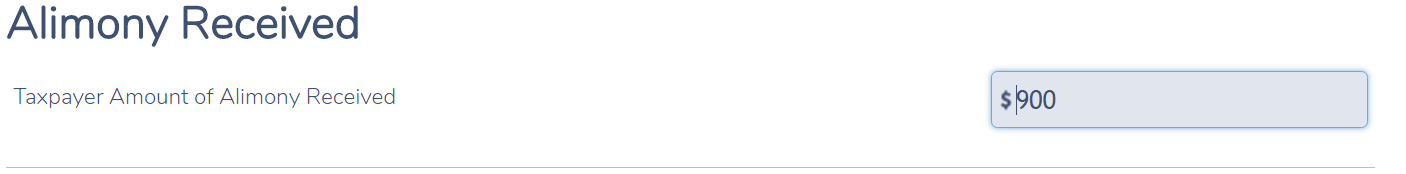
Car & Truck Expenses



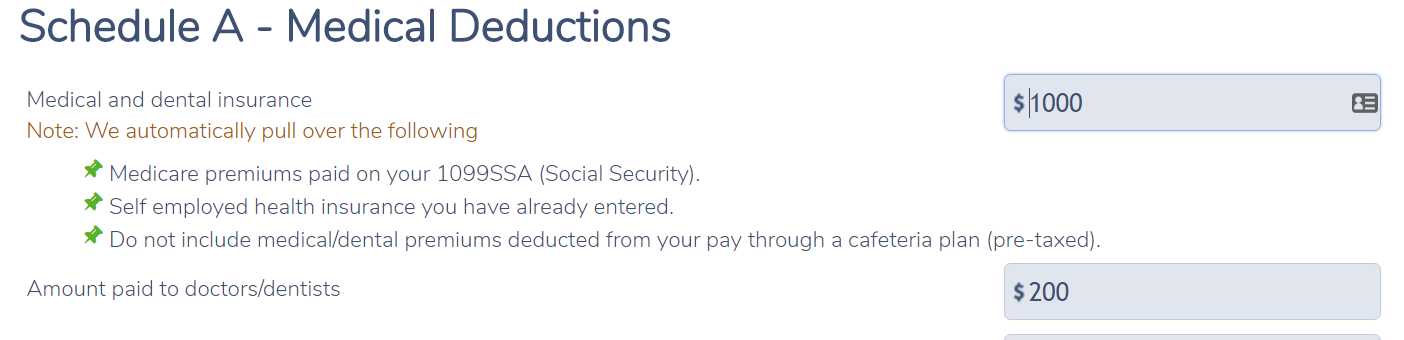
Other Expenses



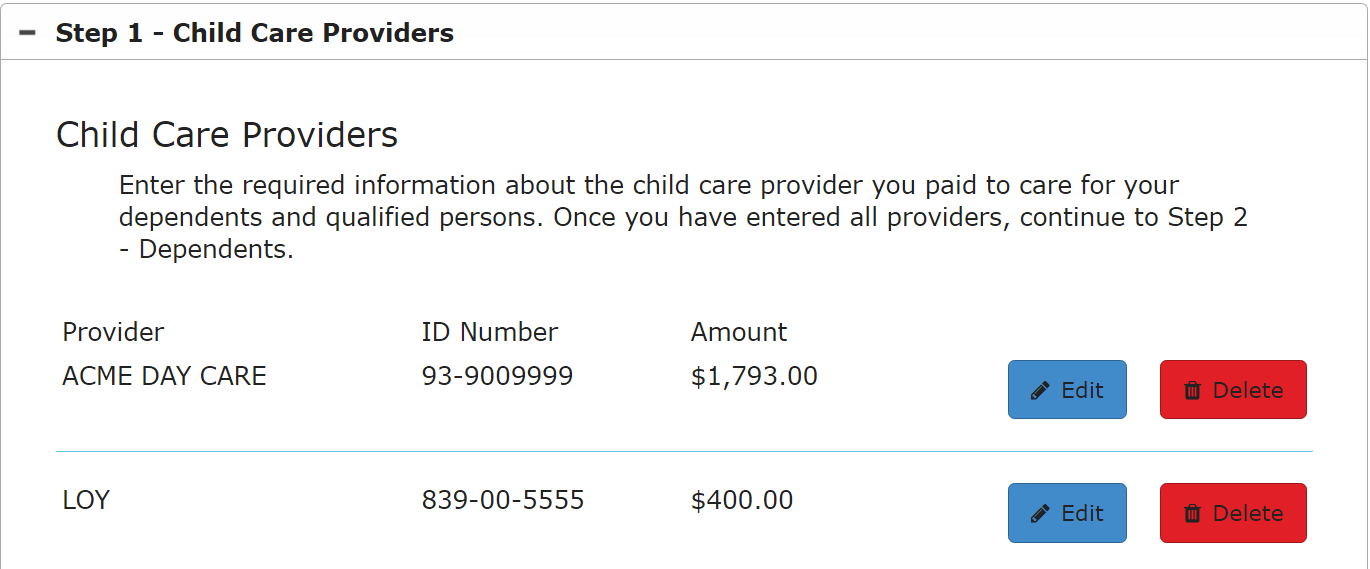
**Alimony Received**

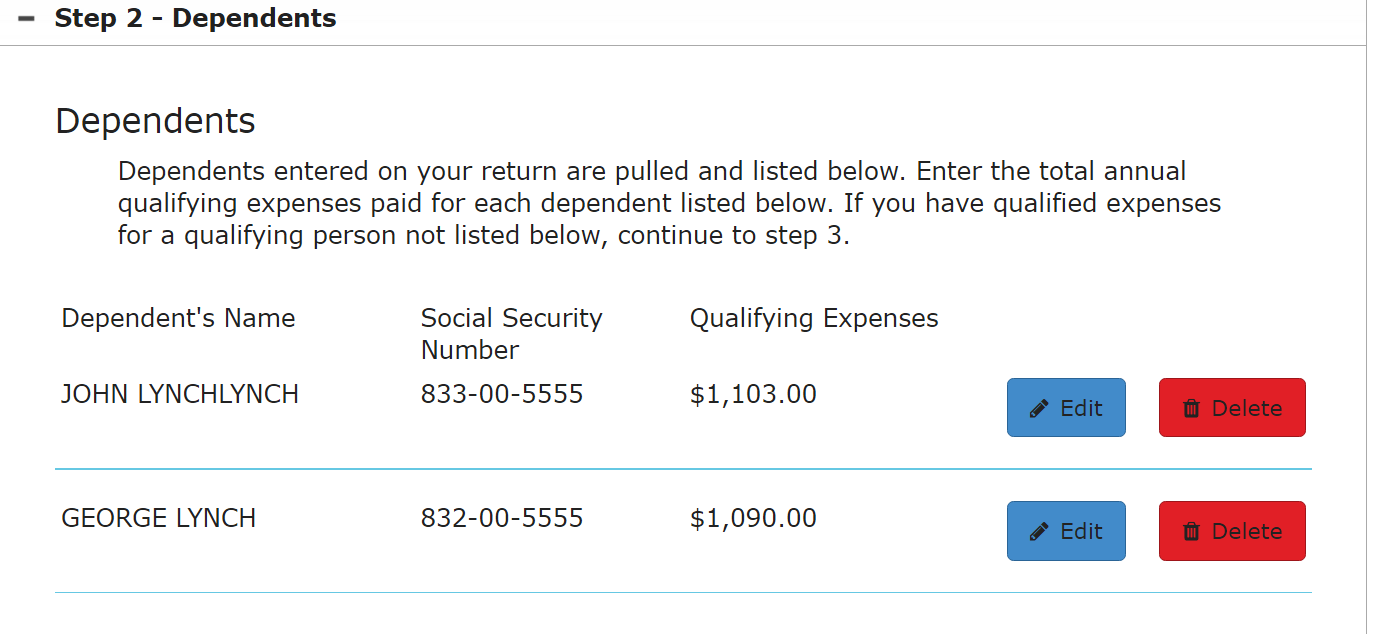


**Schedule A Medical**



**Child Care Credit Form 2441**

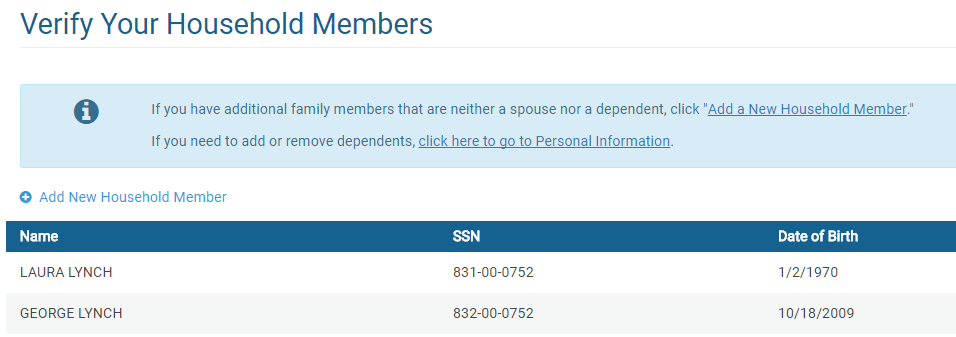




**Health Insurance**



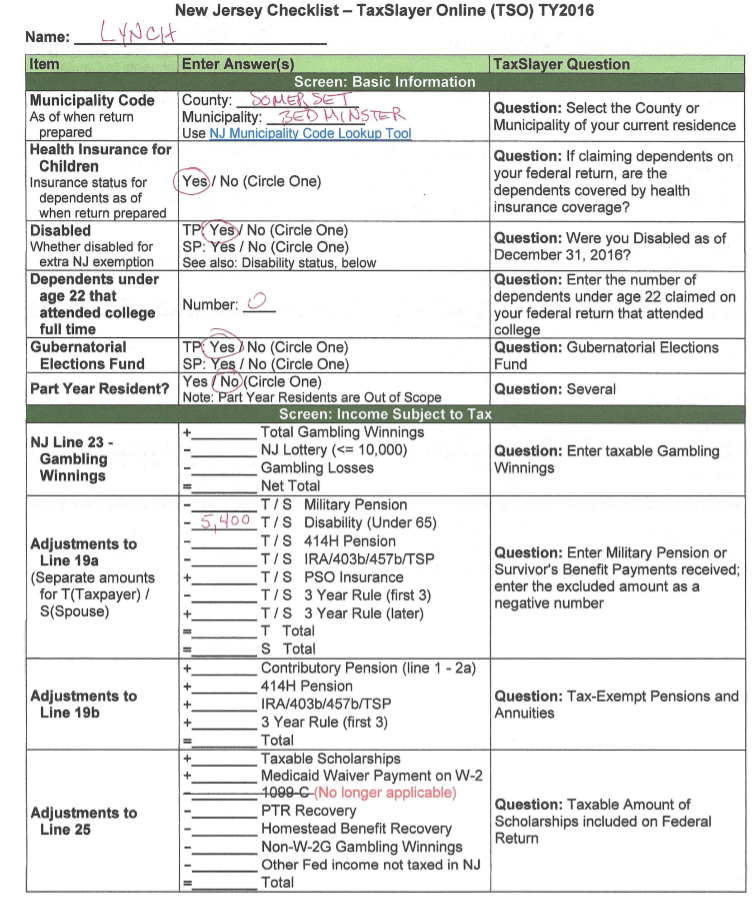


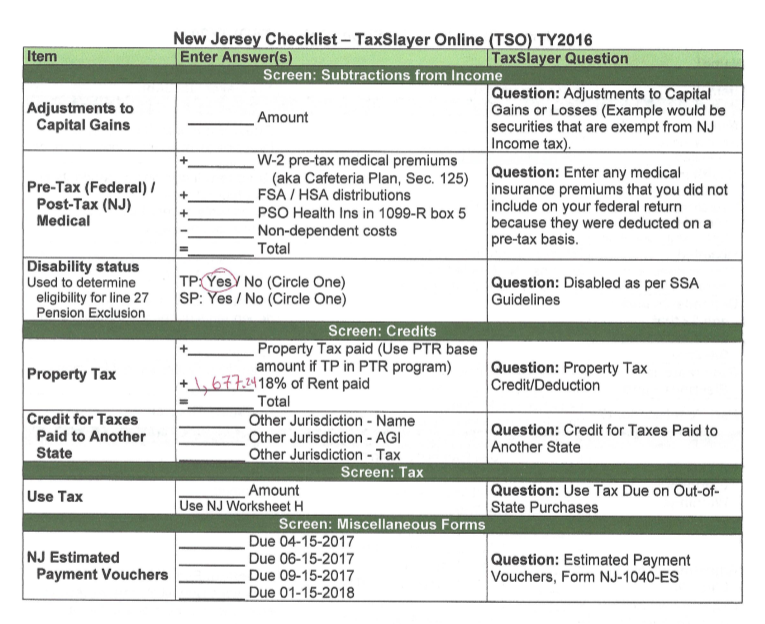




**New Jersey Return**

Check that the numbers shown in the NJ Checklist below have been properly entered in to TaxSlayer.





Rent Calculation: [(755\*6) + (798\*6)] \* .18 = 1677

**e-fILE**

Check that return types are entered as “E-file: Paper Check”

Check that email address is entered on the proper screen

Check that consent placeholder section is completed

Check that questions are answered properly