

## FAM-01 Anderson Refund Monitor

Step	TP Form / Note	TS Screen	Federal Refund	NJ Refund	Notes
<b>Basic Taxpayer, Spouse and Dependent Information</b>					
1		Basic Information -Filing Status			
	Intake Sheet/ Interview	What is your filing Status?			Select Filing status from drop down. Answer: Filing Status: Single
	SS Card Intake Sheet I-Note 1	Personal Information Taxpayer Information Address & Phone Number			Hint: Use Name and SSN from SS card. (Not Intake Sheet) Hint: SSN format YYYY-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 – TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required
<b>Open NJ Return</b>					
2		Left Menu – State Section – Add State Return			
		Your Federal Return is Complete – Add State Return			
		Select Your State			Choose New Jersey from drop down Menu or Map
		Select your New Jersey Return Residency			Select "Resident"
	Intake Sheet G-Note 3	New Jersey State Return			Answer questions on this screen Hint: Select Municipality from drop down menu (Listed by county). Start typing Bergen to quickly scroll down (Edgewater is in Bergen County) Hint: Enter TP Pin (Any 5-digit number) CONTINUE
		Congratulations! You have completed your standard New Jersey state return!			Answer Yes to this question and then CONTINUE. We will come back to the NJ return later
		New Jersey State Return			Hint: Keep clicking CONTINUE until you get back to the first NJ screen
<b>Federal Documents</b>					
		Begin to Enter Tax Documents			

## FAM-01 Anderson Refund Monitor

Step	TP Form / Note	TS Screen	Federal Refund	NJ Refund	Notes
		Left Menu -Federal Section Look at the money you earned – Enter myself			
3	W-2 Billings Market	W2	665	29	Hint: Make corrections so that information matches the information on the W-2 Hint: “Check if this is the taxpayer’s address shown on the W-2” – Checked – Change to match W-2 if required. 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 on NJ warning
4	1099-INT Big City Bank	Interest Income	522	12	Hint: Enter interest amount in box 1
<b>Federal Deductions, Adjustments &amp; Credits</b>					
		Federal Section – Deductions - Adjustments			
5		Federal Section -Deductions – Itemized Deductions - Taxes You Paid	522	12	Go to the Sales Tax Worksheet and enter NJ AND 365 days living in NJ
6		Compare Standard vs Itemized Deductions	522	12	Check to see if using itemized deductions or standard deductions. Itemized =603 Std = 6,300
<b>Health Insurance</b>					
7	Intake Sheet G-Note 2	Health Insurance	522	12	Answer questions in the Health Insurance Section. Everyone on the return has health insurance for the entire year.
<b>New Jersey Return</b>					
8	Complete NJ Return	State Section – Basic Information	522	12	Edit and Check Some of the questions may already have been answered

## FAM-01 Anderson Refund Monitor

Step	TP Form / Note	TS Screen	Federal Refund	NJ Refund	Notes
9	I-Note 1	New Jersey State Return -Credits - Property Tax Credit/Deduction	522	62	Answer questions Use scratch pad at TP4F to determine the proper value for Property Tax Paid Hint: Property Taxes Paid = (rent*.18) = \$2,160 Hint: Taxpayer meets <a href="#">Property Tax Eligibility Requirements</a>
<b>E-File Information</b>					
10	Complete Return	Left Menu – e-file –	522	62	TS – Clear up any diagnostic messages (if any) TS – Ignore Fees section TS – Enter Client Email TS – Pin numbers for e-file are automatically selected TS – Select Return Type as Electronic Mailed - Next TS – Complete State return(s) section – Electronic Mailed– Next TS – Third party designee – Ignore – Out of Scope - Next TS – Questions – Answer questions from Intake sheet, Part VII, lines 4 & 5 – Save E-File SAVE does not work in Practice Lab
<b>Complete Return</b>					
11		Submission Screen	522	62	Click “Ready for Review “at the bottom of the page. You are done. Ready for QR