

## FAM-02 Conway 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	What is your filing Status?			Select Filing status from drop down. Answer: Filing Status: Married filing jointly
	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 – 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
<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 2&3	New Jersey State Return			Answer questions on this screen Hint: Select Municipality from drop down menu (Listed by county). Answer: Jersey City is in Hudson County Hint: Enter TP and SP Pin (Any 5-digit number) Hint: Do not go beyond this screen. We will add additional items to NJ later in the problem
		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>					
		Left Menu – Federal Section			
		Let’s look at the money You earned – Enter Myself			
		Income			

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3	W-2 Vampire Engineering	W2	3,772	538	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 – <u>Change to match W-2</u> Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct Hint: Check amounts in boxes 3-6 for correct entries 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
		W-2 Wage Statement			Click "Add" a W-2
4	W-2 Smart Kids Charter School	W2	1,859	578	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 – <u>Change to match W-2</u> Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct Hint: Check boxes 3-6 for correct entries 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
5	1099-INT PNC	Interest Income	1,821	573	Hint: Select for Taxpayer Enter values that apply
6	1099-G NJ Dep of Labor	Unemployment Income	1,230	573	TS:: This 1099G worksheet is for the: Taxpayer Hint: Phone number not required Hint: State information not required
Enter Federal Deductions, Adjustments & Credits					
		Federal Section – Deductions - Adjustments			
7	I-Note 4	Federal Section -Deductions – Itemized Deductions - Taxes You Paid	1,230	573	Hint: Go to the Sales Tax Worksheet and enter NJ AND 365 days living in NJ. Sales tax will not calculate if you do not complete this step

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8		Compare Standard vs Itemized Deductions	1,230	573	Check to see if using itemized deductions or standard deductions. Answer: Itemized Deduction= 1,823 Standard Deduction = 12,600
<b>Health Insurance</b>					
9	Intake Sheet G-Note 2	Health Insurance			Answer questions in the Health Insurance Section
<b>New Jersey Return</b>					
10		Basic Information	1,230	573	Edit and Check Some of the questions may already have been answered
11	I-Note 1 G-Note 2,3,4	New Jersey State Return - Credits - Property Tax Credit/Deduction	1,230	652	Answer questions Use scratch pad at TP4F to determine the proper value for Property Tax Paid Hint: Property Taxes Paid = (rent*.18) =21000*.18=3780 Hint: Taxpayer meets <a href="#">Property Tax Eligibility Requirements</a>
12	I-Note 3	New Jersey State Return -Tax	1,230	547	Hint: Sales/Use tax owed = \$105
<b>E-Fie Information</b>					
13	Check Intake Sheet G-Note 5&7	Left Menu – e-file –	1,230	547	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 Direct Deposit - Next TS – Complete Bank Information for Direct Deposit - Next TS – Complete State return(s) section – Direct Deposit – 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>					
14		Submission Screen	1,230	547	Click “Ready for Review “at the bottom of the page. You are done. Ready for QR.