

## FAM-04 McCook Refund Monitor

|  | TP Form / Note                         | TS Screen   | Federal Refund | NJ Refund | Notes   |
|--|--|---|----------------|-----------|---|
| Basic Taxpayer, Spouse and Dependent Information |  |   |                |           |   |
| 1  |  | Basic Information – Filing Status   |                |           |   |
|  | Intake Sheet                           | What is your filing Status?   |                |           | Select Filing status from drop down.<br>Answer: Filing Status: Married filing jointly   |
|  | SS Card<br>Intake Sheet<br>I-Note 1 &6 | Personal Information<br>Tax payer Information<br>Spouse Information<br>Address & Phone Number |                |           | Hint: Use Name and SSN from SS card. (Not Intake Sheet)<br>Hint: SSN format YYYY-00-0752<br>TS: Birth date can be entered using drop down menu or filling in the field.<br>TS: Check any of the “Check here” questions that apply –<br>Hint: Check here if the Spouse wishes to contribute \$3 to the Presidential Election Campaign Fund.<br>TS: Spouses last name auto populates when field is selected. Change if required.<br>TS: Enter Zip code- TaxSlayer fills in city and state.<br>Correct if required |
|  |  | Dependents/ Qualifying Person -Begin  |                |           |   |
|  |  | Dependent/Qualifying Child Information  |                |           | Add dependent information<br>Hint: Use name and SSN from SS card (Not Intake Sheet)<br>Answer: SSN format = YYYY-00-0752<br>Check the “Check if” questions that apply<br>Hint: Dependent is a full time student<br>Answer: Dependent is a full time student   |
| Open NJ Return                                   |  |   |                |           |   |
| 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<br>G-Note 3               | New Jersey State Return   |                |           | Answer questions on this screen<br>Hint: Select Municipality from drop down menu (Listed by county). Paterson is in Passaic County.<br>Hint: Enter TP and SP Pin for now (Any 5-digit number)<br>CONTINUE   |
|  |  | Congratulations! You have completed your standard New Jersey state return!                    |                |           | Answer Yes to this question and then CONTINUE.<br>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.   |
| Federal Documents                                |  |   |                |           |   |

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|  |                                       | Left Menu – Federal Section   |                |           |   |
|  |                                       | Let's look at the money<br>You earned – Enter Myself                  |                |           |   |
|  |                                       | Income  |                |           |   |
|  |                                       | IRA/Pension Distributions - Begin                                     |                |           |   |
| 3  | SSA-1099 Troy<br>Ssa-1099 Yvonne      | Social Security 1099 SSA  | 1,671          | 0         |   |
| 4  | 1099-DIV<br>Oppenheimer Fund          | Dividend Income   | 1,671          | (342)     | Hint: Select for Taxpayer<br>Enter values that apply  |
| 5  | 1099-R<br>Ameritech Pension Trust     | Form 1099-R   | 1,440          | (342)     | Hint: "This 1099-R is for the Taxpayer<br>TS: "Check if this is the taxpayer's address shown on the 1099-R" – Checked<br>TS: You do not have to select a State for income to go to the State return.  |
| 6  | 1099-R Phoenix<br>Investment Partners | Form 1099-R   | (117)          | (440)     | Hint: Add a 1099-R<br>Hint: "This 1099-R is for the Spouse<br>TS: "Check if this is the taxpayer's address shown on the 1099-R" – Checked<br>TS: You do not have to select a State for income to go to the State return   |
| <b>Federal Deductions, Adjustments &amp; Credits</b> |                                       |   |                |           |   |
|  |                                       | Federal Section – Deductions - Adjustments                            |                |           |   |
| 7  |                                       | Federal Section -Deductions – Itemized<br>Deductions - Taxes You Paid | (117)          | (440)     | Go to the Sales Tax Worksheet and enter NJ AND 365<br>days living in NJ   |
| 8  |                                       | Compare Standard vs<br>Itemized Deductions                            | (117)          | (440)     | Check to see if using itemized deductions or standard<br>deductions. Itemized = 861<br>Std = 15,100   |
| <b>Health Insurance</b>                              |                                       |   |                |           |   |
| 9  | G-Note 2                              | Health Insurance  | (117)          | (440)     | Answer questions in the Health Insurance Section  |
| <b>New Jersey Return</b>                             |                                       |   |                |           |   |
| 10   |                                       | Basic Information   | (117)          | (440)     | Edit and Check<br>Some of the questions may already have been answered  |
| 11   | I-Note 1<br>G-Note 2,3,4              | New Jersey State Return -Credits -<br>Property Tax Credit/Deduction   | (117)          | (390)     | Answer questions<br>Use scratch pad at TP4F to determine the proper value for<br>Property Tax Paid<br>Hint: Property Taxes Paid = (rent*.18) = \$2,250<br>Hint: Taxpayer meets Property Tax Eligibility<br>Requirements<br>Hint: Taxpayer was not a homeowner in 2015 |

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| <b>E-file Information</b> |                |                      |                |           |  |
| 12                        | DD Information | Left Menu – e-file – | (117)          | (390)     | TS – Clear up any diagnostic messages (if any)<br>TS – Ignore Fees section<br>TS – Enter Client Email<br>TS – Pin numbers for e-file are automatically selected<br>TS – Select Return Type as “Mail Payment” - Next<br>TS – Complete State return(s) section – “Electronic State Balance Due” - Next<br>TS – Third party designee – Ignore – Out of Scope - Next<br>TS – Questions – Answer questions from Intake sheet, Part VII, lines 4 & 5 – Save<br>E-File SAVE does not work in Practice Lab |
| <b>Complete Return</b>    |                |                      |                |           |  |
| 13                        |                | Submission Screen    | (117)          | (390)     | Click “Ready for Review “at the bottom of the page. You are done. Ready for QR.  |