

FAM-05 Rosemont Refund Monitor

Step	TP Form / Note	TS Screen	Federal Refund	NJ Refund	Notes
Basic Taxpayer, Spouse and Dependent Information					
1		Basic Information -Filing Status			
	Intake Sheet/ Interview	What is your filing Status?			Select Filing status from drop down. Answer: Filing Status: Married Filing Separately
	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 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 – Presidential Election Campaign Fund Hint: The only spouse info required is his SSN TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required
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 G-Note 3	New Jersey State Return			Answer questions on this screen Hint: Select Municipality from drop down menu (Listed by county). Medford is in Burlington County Hint: Gubernatorial election campaign fund - Yes 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
Federal Documents					
		Begin to Enter Tax Documents			
		Left Menu -Federal Section Look at the money you earned – Enter myself			

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3	W-2 Hair Do Salon	W2	(93)	(46)	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-G NJ Dept of Labor	Unemployment	(250)	(46)	Hint: Do not enter NJ information
Federal Deductions, Adjustments & Credits					
		Federal Section – Deductions - Adjustments			
5		Federal Section -Deductions – Itemized Deductions - Taxes You Paid	(250)	(46)	Go to the Sales Tax Worksheet and enter NJ AND 365 days living in NJ
6		Compare Standard vs Itemized Deductions	(250)	(46)	Check to see if using itemized deductions or standard deductions. Itemized = 533 Std = 6,300
Health Insurance					
7	Intake Sheet G-Note- 2	Health Insurance	(250)	(46)	Answer questions in the Health Insurance Section. Everyone on the return has health insurance for the entire year.
New Jersey Return					
8	Complete NJ Return	State Section – Basic Information	(250)	(46)	Edit and Check Some of the questions may already have been answered
9	I-Note 3 G-Note 4	New Jersey State Return -Credits - Property Tax Credit/Deduction	(250)	7	Answer questions Use scratch pad at TP4F to determine the proper value for Property Tax Paid Hint: Property Taxes Paid = 1,400*12=16,800*.18=3,024 Hint: Taxpayer meets <u>Property Tax Eligibility Requirements</u>
E-File Information					

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10	Complete Return G-Note 5, 8	Left Menu – e-file –	(250)	7	TS – Clear up any diagnostic messages (if any) TS – Ignore Fees section TS – Enter Client Email if available TS – Pin numbers for e-file are automatically selected TS – Select Return Type as Electronic Mailed – Next TS – Enter routing and account numbers for direct deposit/ debit 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
Complete Return					
11		Submission Screen	(250)	7	Click “Ready for Review “at the bottom of the page. You are done. Ready for QR