

# NJ Tax Refund Worksheet

Name:

• Current Year:

This calculator is specifically designed for handling New Jersey tax refunds.

Some infrequent and more complicated situations are not handled:

- TP has refunds other than state income tax, PTR, or Homestead Benefit (e.g. medical)
- TP Made NJ estimated payments after 12/31 of the tax year and wants to allocate refunds
- TP has unused non-refundable credits and wants to check for a better result
- TP forced the use of itemized deductions instead of the standard deduction (e.g. MFS situation)
- TP was claimed as a dependent on another return
- TP had QBID last year

Do any of the above apply for this TP?

Refund(s) received in 2019	Received	Pot. Taxable
Total state income tax refund(s) received in 2019 for taxes paid in 2018	<input type="text" value="467"/>	
PTR refund received in 2019 for taxes paid in 2018	<input type="text" value="1,150"/>	
Did TP itemize in 2018 (enter "Not Sure" if you do not have access to 2018 return, including Sch A)	<input type="text" value="Yes"/>	
HB refund received in 2019 for taxes paid in 2016	<input type="text" value="425"/>	
Did TP itemize in 2016	<input type="text" value="Yes"/>	

### Standard deduction info for 2018

Filing Status <input type="text" value="Married filing Jointly"/>	Standard deduction:
<input checked="" type="checkbox"/> TP 65 or older <input type="checkbox"/> TP blind <input checked="" type="checkbox"/> SP 65 or older <input checked="" type="checkbox"/> SP blind	<input type="text" value="27,900"/>

### Schedule A info for 2018

	Original	
Income / Sales Taxes (Sch A, line 5a)	<input type="text" value="975"/>	
Were sales taxes used instead of incomes taxes	<input type="text" value="No"/>	
General sales taxes for 2018 (The <a href="#">NJ Sales Tax calculator</a> can be used for this)		<input type="text" value="881"/>
Property taxes (Sch A, line 5b)	<input type="text" value="7,000"/>	
Personal property taxes (Sch A, line 5c) [NJ does not have personal property taxes]		<input type="text"/>
Sch A total itemized deductions (Sch A, line 17)	<input type="text" value="28,500"/>	

### Taxable income test for 2018

Is Taxable income (1040, line 10) greater than zero	<input type="text" value="Yes"/>
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### Taxable amounts for 2019

Total refunds: 2,042    Taxable refunds: 1,025    Untaxed refunds: 1,017		
Taxable state income tax refund (Sch 1, line 1) TSO: (TS Income > State and Local Refunds > Bypass worksheet line)		<input type="text" value="45"/>
Taxable PTR refund	<input type="text" value="555"/>	
Taxable HB refund	<input type="text" value="425"/>	
Other income (Sch 1, line 8) TSO: TS Income > Other Income		<input type="text" value="980"/>

Input color key: Error   Enter   ReadOnly   Calculated   •    Show intermediate calculations