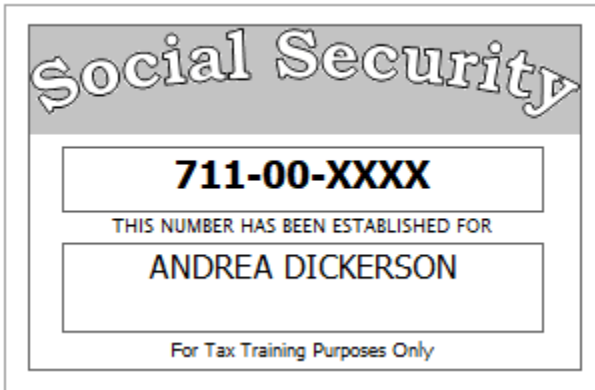


FAM-01 Dickerson Scenario

Step 0 Intake + Interview → Filing Status, Dependency

Documents:



Step 1 Basic Information

FAM-01 Dickerson Scenario

TP Form / Note	TS Screen	Notes
SS Card	Start a New 2019 Tax Return- Select Enter Social Security Number Available Taxpayer Profiles "Start Return"	Enter the TP SSN twice Hint: SSN format YYY-00-XXXX. YYY= from SS card. XXXX = any 4 digit number Ignore the Profiles

FAM-01 Dickerson Scenario

TP Form / Note	TS Screen	Notes
Intake Sheet	What is your filing Status?	TS Answer: Filing Status: Single" TS: "Continue"
SS Card Intake Sheet	Personal Information Taxpayer Information Address & Phone Number	<p>TS: Enter all information using "Caps Lock" Hint: Use Name and SSN from SS card. (Not Intake Sheet)</p> <p>TS: Birth date can be entered using drop down menu or filling in the field.</p> <p>TS: Check any of the "Check here" questions that apply</p> <ul style="list-style-type: none"> • There are none <p>TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required</p> <p>TS: Resident State as of 12/31 will default to NJ</p> <p>TS: Telephone number is important for client contact if an issue arises.</p> <p>TS: "Continue"</p>

FAM-01 Dickerson Scenario


TP Form / Note	TS Screen	Notes
Intake Sheet	<p>New Jersey Return</p> <p>NJ Property Tax Credit or Deduction Do you meet Property Tax Credit or Deduction Eligibility Requirements?</p> <p>Taxpayer NJ Health Insurance Does the Taxpayer have Health Insurance?</p>	<p>TS Answer: At this point answer "No". We will go back and adjust after the Federal Return is complete</p> <p>TS Answer: "Yes"</p> <p>At this point just hit "Continue" We will go back and adjust after the Federal Return is complete</p>
	<p>Dependents or Qualifying Child Information Do you have any Dependents or Qualifying Person(s) to claim on your return?</p>	<p>TS: Answer is "No"</p>

Federal AGI: 0	Federal Refund: 0	NJ Refund Amount: 0
-----------------------	--------------------------	----------------------------

FAM-01 Dickerson Scenario

Step 2 W-2 Billings Market

W-2 Billings Market	Left Menu – Federal Section Income W-2 Wages and tax statement “Begin” Complete W-2 Information-	<p>Hint: Make corrections so that information matches the information on the paper W-2.</p> <ul style="list-style-type: none"> TP address shown on the TS W-2 should match the paper W-2 If the name and address of the employer come up after inputting the employer Identification Number, check that the information matches the paper W-2 <p>Hint: Always round up for cents amounts ending in .50 or enter cents and TS will round it for you.</p> <p>Hint: Box 14 NJ Codes are selected from drop down menu. All other entries in box 14 are lumped under “Other”</p> <p>Hint: If NJ State EIN auto populates, check to be sure it is correct</p> <p>TS: “Continue” to save</p>
---------------------	--	---

a. Employee's social security number 711-XX-XXXX	Save, accurate, FAST! Use		Visit the IRS website at www.irs.gov/efile	
b. Employer identification number (EIN) 71-9002540		1. Wages, tips, other compensation \$26,298.00	2. Federal income tax withheld \$2,600.05	
c. Employer's name, address, and ZIP code BILLINGS MARKET 123 RIVER ROAD EDGEWATER, NJ 07020		3. Social security wages \$26,298.00	4. Social security tax withheld \$1,630.48	
		5. Medicare wages and tips \$26,298.00	6. Medicare tax withheld \$381.32	
		7. Social security tips	8. Allocated tips	
d. Control number		9.	10. Dependant care benefits	
e. Employee's first name and initial Last name Suff. Employee's address and ZIP code ANDREA DICKERSON 127 HARBOR AVENUE EDGEWATER, NJ 07020		11. Nonqualified plans		
		13. Statutory Retirement Third-party Employee Plan sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	12a. See instructions for box 12	
		14. Other NJSDI 44.71		12b.
		NJSUI 111.77		12c.
NJFLI 21.04		12d.		
15. State NJ	Employer's state ID number 719002540	16. State wages, tips, etc. \$26,298.00	17. State income tax 400.99	
18. Local wages, tips, etc.		19. Local income tax		
20. Locality name				
Form W-2 Wage and Tax Statement 2019 Copy B - To Be Filed With Employee's FEDERAL Tax Return. This information is being furnished to the Internal Revenue Service.				

Federal AGI: 26,298 Federal Refund: 1,105 NJ Refund Amount: 29

FAM-01 Dickerson Scenario

Step 3 Interest 1099-INT

TP Form / Note	TS Screen	Notes
1099-INT Big City Bank	Income 1099-DIV,INT,OID –“Begin” Interest or Dividend Income –“Begin” 1099 Description Schedule B <ul style="list-style-type: none"> Select Interest Income –“Continue” 	Enter values that apply.. “Continue” to save

<input type="checkbox"/> CORRECTED (if checked)					
PAYER'S name Street address City or town, state or province, country, ZIP or foreign postal code Telephone no. BIG CITY BANK 4 MAIN ST EDGEWATER, NJ 07020		Payer's RTN (optional)	OMB No. 1545-0112 <div style="font-size: 2em; font-weight: bold; margin: 0;">2019</div> Form 1099-INT		Interest Income
		1 Interest income \$933.00			Copy B For Recipient
		2 Early withdrawal penalty			
PAYER'S TIN 71-8000250	RECIPIENT'S TIN 711-XX-XXXX	3 Interest on US Savings Bonds and Treas. obligations			
RECIPIENT'S name Street address (including apt.no.) City or town, state or province, country, ZIP or foreign postal code ANDREA DICKERSON 127 HARBOR AVENUE EDGEWATER, NJ 07020		4 Federal income tax withheld	5 Investment expenses	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported	
		6 Foreign Tax Paid	7 Foreign Country or US possession		
		8 Tax exempt interest	9 Specified private activity bond interest		
		10 Market Discount	11 Bond Premium		
		12 Bond premium on Treasury obligations	13 Bond Premium on tax-exempt bond		
		14 Tax-exempt and tax credit bond CUSIP no.	15 State		16 State Identification no.
Form 1099-INT					

Federal AGI: 27,231 Federal Refund: 991 NJ Refund Amount: 12

Step 4 Student Loan Interest

TP Form / Note	TS Screen	Notes
Intake Sheet Page 3	Left Menu Federal Section – Deductions Adjustments – “Begin” Student Loan Interest Deduction – “Begin”	Enter Student Loan Interest Amount “Continue”

Federal AGI: 27,064 Federal Refund: 1,009 NJ Refund Amount: 12

FAM-01 Dickerson Scenario

Step 5 Itemized Deductions – Taxes You Paid

TP Form / Note	TS Screen	Notes
	Left Menu-Federal Section - Deductions Itemized Deductions – “Begin” Taxes You Paid – “Begin” Select ADD SALES TAX WORKSHEET	TS: Go to ADD SALES TAX WORKSHEET and enter ZIP Code and 365 days living in NJ “Continue”

Federal AGI: 27,064 Federal Refund: 1,009 NJ Refund Amount: 12

Step 6 Compare Standard vs Itemized Deductions

TP Form / Note	TS Screen	Notes
	Federal Section Deductions Compare Deductions – “Begin”	TS: Check to see if using itemized or standard deductions. Itemized = \$579 Std = \$12,200 Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. “Continue”

Federal AGI: 27,064 Federal Refund: 1,009 NJ Refund Amount: 12

Step 7 Health Insurance

TP Form / Note	TS Screen	Notes
Intake Sheet Page 2, Part V, Line 9	Left Menu-Health Insurance Health Insurance Questionnaire Did you, your spouse, or a dependent purchase health insurance via HealthCare.gov or a State Marketplace?	TS – No “Continue”

Federal AGI: 27,064 Federal Refund: 1,009 NJ Refund Amount: 12

FAM-01 Dickerson Scenario

Step 8 New Jersey Return

TP Form / Note	TS Screen	Notes
NJ Checklist	State Return –Edit	Hint: Use the NJ Checklist to enter NJ items
	NJ Property Tax Credit/Deduction	TS: Answer “Yes” to this question now Hint: Taxpayer meets Property Tax Eligibility Requirements Hint: See NJ Checklist, page 2, Credits for property tax number to use. Hint: Taxpayer was a Renter “SAVE”
	Taxpayer NJ Health Insurance	TS: Answer is “Yes”
	Basic Information – “Edit”	TS: Complete Basic Information. Use NJ checklist page 1 -Basic Information Hint: To select County and municipality of your current residence, select the drop down arrow and type Bergen. Then scroll down to Edgewater Boro.
	Credits	Hint: Use the “NJ Municipality Code Lookup” in the TaxPrep4Free Preparer’s Page to determine the county if you are not sure. “Save” back to the beginning of the State Return and EXIT NEW JERSEY RETURN in order to get the refund monitor to update.

Federal AGI: 27,064 Federal Refund: 1,009 NJ Refund Amount: 62

FAM-01 Dickerson Scenario

Step 14 Prepare for e-file

Intake Sheet	Left Menu – E-file	TS – Clear up any diagnostic messages (if any) . Ignore any message about Identity protection Pin. “Continue”
	Federal Return Type	TS: Select “E:file: Paper Check” Next
	Fees	TS: No entries in Fees section except for Client email address Next
	State Return Type	TS: Select State Refund Type “E:file: Paper Check” Next
	Third Party Designee Info	TS: Skip Third Party Designee. It is Out of Scope for us. Next
	Consent to Disclose	TS: Consent to Disclose Tax Return Information – Check GRANT and enter 5 digit pin (any 5 digit number) and date for TP. Next
	Questions	TS – Questions – Answer questions from Intake sheet Part VII, lines 5.6,7 and 8 <ul style="list-style-type: none"> • Assume taxpayer was present • If there are no questions, just ignore for now. Next
	Taxpayer ID Information	TS: Skip TP ID Information Screen. Not required for NJ. Save You are Done

Federal AGI: 27,064 Federal Refund: 1,009 NJ Refund Amount: 62