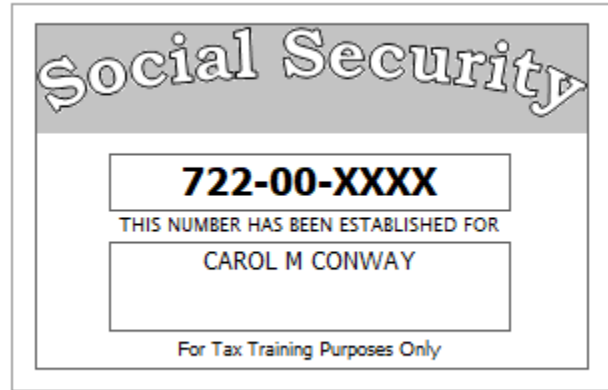
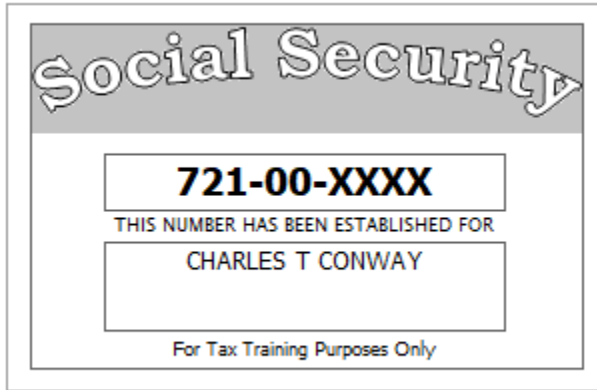


## FAM-02 Conway Scenario

### Step 0 Intake + Interview → Filing Status, Dependency



### Step 1 Basic Information

TP Form / Note	TS Screen	Notes
SS Card	Start a New 2019 Tax Return  Available Taxpayer Profiles	TS: Enter Social Security Number of Primary taxpayer twice. Hint: SSN format- Use any 4 digits for the last four numbers of the SSN. TS: Ignore the “Available Taxpayer Profiles” TS: Select “Start Return”
Intake Sheet	What is your filing Status?	Answer: Filing Status: Married filing jointly “Continue”
SS Card Intake Sheet	Personal Information Taxpayer Information Spouse Information Address & Phone Number	TS: Enter all information using “Caps Lock” Hint: Use Name and SSN from SS card. (Not Intake Sheet) Hint: SSN format - Use any 4 digits for the last four numbers of the SSN 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 <ul style="list-style-type: none"> <li>• None</li> </ul> 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 TS: : New Jersey automatically populates as the Resident State TS: “Continue”

## FAM-02 Conway 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>Did you and, if applicable, all members of your health care shared responsibility family, have qualifying coverage for every month in 2019? NOTE: If you answer 'NO', you will need to identify for each person in the household, whom had health coverage for each month, if applicable.</p>	<p>Hint: Begin NJ Checklist</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>
Intake Sheet.	<p>Dependents/ Qualifying Person(s)</p> <p>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**

### Step 2      W-2 Vampire Engineering

W-2 Vampire Engineering	<p>Left Menu – Income W-2 Wages and tax statement "Begin"</p>	<p>Hint: This is Charles Conway's W-2</p> <p>Hint: Make corrections so that information matches the information on the W-2.</p> <ul style="list-style-type: none"> <li>Correct the address of Employee in the TaxSlayer W-2 to match paper W-2.</li> <li>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</li> </ul> <p>Hint: Check boxes 3-7 for correct entries</p> <p>Hint: Always round up for amounts ending in .50 or enter the cents and TaxSlayer will round off for you.</p> <p>Hint: Box 12 Use dropdown to select correct code</p> <p>Hint: Box 13- Retirement Plan should be checked</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>Hint: Correct NJ wages</p> <p>Note: The difference between Box 1 and Box 16 is not pre tax medical.</p> <p>TS: Click Save &amp; Enter Another</p> <p>TS: NJ warning – Check that the amount in box 16 is correct. If yes.</p> <p>"Continue"</p>
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## FAM-02 Conway Scenario

a. Employee's social security number 721-XX-XXXX		Save, accurate, FAST! Use OMB No. 1545-0008				Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>		
b. Employer identification number (EIN) 72-9002540			1. Wages, tips, other compensation \$32,867.00		2. Federal income tax withheld \$4,500.00			
c. Employer's name, address, and ZIP code  VAMPIRE ENGINEERING 32 BLOOD AVE JERSEY CITY, NJ 07310			3. Social security wages \$33,867.00		4. Social security tax withheld \$2,099.75			
			5. Medicare wages and tips \$33,867.00		6. Medicare tax withheld \$491.07			
			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  CHARLES T CONWAY 967 WATER ST HOBOKEN, NJ 07030			11. Nonqualified plans			12a. See instructions for box 12 D      \$1,000.00		
			13. Statutory Retirement Third-party Employee Plan sick pay <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>			12b.		
			14. Other NJSUI      142.40			12c.		
			NJSDI      56.96			12d.		
			NJFLI      26.80			12e.		
15. State	Employer's state ID number	16. State wages, tips, etc.	17. State income tax	18. Local wages, tips, etc.	19. Local income tax	20. Locality name		
NJ	72-9002540	\$33,505.00	1,020.00					

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: 32,867      Federal Refund: 4,152      NJ Refund Amount: 538**

### Step 3      W-2 Smart Kids Charter School

W-2 Smart Kids Charter School	Add W-2 Statement	Hint: This W-2 is for Carol Hint: Make corrections so that information matches the information on the paper W-2 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" TS: Click "Continue"
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## FAM-02 Conway Scenario

a. Employee's social security number 722-XX-XXXX		Save, accurate, FAST! Use OMB No. 1545-0008				Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>		
b. Employer identification number (EIN) 72-8002540			1. Wages, tips, other compensation \$20,176.00		2. Federal income tax withheld \$1,200.00			
c. Employer's name, address, and ZIP code  SMART KIDS CHARTER SCHOOL 98 WILLOW LANE BOSTON, MA 02108			3. Social security wages \$20,176.00		4. Social security tax withheld \$1,250.91			
			5. Medicare wages and tips \$20,176.00		6. Medicare tax withheld \$292.55			
			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  CAROL M CONWAY 910 BIRCH ST JERSEY CITY, NJ 07310			11. Nonqualified plans			12a. See instructions for box 12		
			13. Statutory      Retirement      Third-party Employee      Plan      sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			12b.		
			14. Other NJSUI      85.75			12c.		
			NJSDI      34.30			12d.		
			NJFLI      16.14			12e.		
15. State	Employer's state ID number	16. State wages, tips, etc.	17. State income tax	18. Local wages, tips, etc.	19. Local income tax	20. Locality name		
NJ	72-8002540	\$20,176.00	403.50					

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: 53,043      Federal Refund: 2,753      NJ Refund Amount: 578**

## FAM-02 Conway Scenario

### Step 4 Interest 1099-INT -PNC Bank

TP Form / Note	TS Screen	Notes
1099-INT PNC Bank	Left Menu - Income 1099-DIV,INT,OID Interest income, dividends, and distributions " Begin" Interest or Dividend Income –"Begin" Interest Income, Form 1099-INT "Continue"	Hint: Enter payers name only Hint: Interest is for Taxpayer Enter values that apply "Continue"

<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.  PNC BANK ROUTE 10 WEST RANDOLPH, NJ 07869		Payer's RTN (optional)	OMB No. 1545-0112  <div style="text-align: center; font-size: 2em; font-weight: bold;">2019</div> Form 1099-INT	Interest Income		
		1 Interest income <div style="text-align: right;">\$234.00</div>				
		2 Early withdrawal penalty <div style="text-align: right;">\$23.00</div>	Copy B For Recipient			
PAYER'S TIN 12-3002540	RECIPIENT'S TIN 721-XX-XXXX	3 Interest on US Savings Bonds and Treas. obligations		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		
RECIPIENT'S name Street address (including apt.no.) City or town, state or province, country, ZIP or foreign postal code  CHARLES T CONWAY 910 BIRCH ST JERSEY CITY, NJ 07310		4 Federal income tax withheld	5 Investment expenses			
		6 Foreign Tax Paid	7 Foreign Country or US possession			
FATCA filing requirement <input type="checkbox"/>		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			
Account number (see instructions)		14 Tax-exempt and tax credit bond CUSIP no.	15 State	16 State Identification no.	17 State tax withheld	
Form <b>1099-INT</b>						

<b>Federal AGI: 53,254</b>	<b>Federal Refund: 2,723</b>	<b>NJ Refund Amount: 573</b>
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## FAM-02 Conway Scenario

### Step 5 Unemployment 1099-G

TP Form / Note	TS Screen	Notes
1099-G NJ Dep of Labor	Left Menu- Federal Section - Income Form 1099-G Box 1 Unemployment Compensation – “Begin”  Add or Edit a 1099-G - Begin	TS: This 1099G worksheet is for Charles Conway  Hint: Phone number not required  Hint: State information not required  Continue

<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.  NEW JERSEY DEPARTMENT OF LABOR PO BOX 908 TRENTON, NJ 08625		1 Unemployment compensation  <div style="text-align: center; font-size: 1.2em;">\$9,860.10</div>	OMB No. 1545-0120  <div style="text-align: center; font-size: 2em; font-weight: bold;">2019</div> Form 1099-G
PAYER'S TIN 22-2481818		RECIPIENT'S TIN 721-XX-XXXX	4 Federal income tax withheld  <div style="text-align: center; font-size: 1.2em;">\$986.01</div>
RECIPIENT'S name Street address City or town, state or province, country, ZIP or foreign postal code  CHARLES T CONWAY 910 BIRCH ST JERSEY CITY, NJ 07310		5 RTAA payments  7 Agriculture payments  9 Market gain	6 Taxable grants  8 If checked, box 2 is trade or business income > <input type="checkbox"/>  11 State income tax withheld
Account number (see instructions)		10. State NJ	10b State identification no. ----- -----
Form <b>1099-G</b>			

**Certain Government Payments**

**Copy B For Recipient**  
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.

**Federal AGI: 63,114    Federal Refund: 2,527    NJ Refund Amount: 573**

### Step 6 Itemized Deductions – Taxes You Paid

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

**Federal AGI: 63,114    Federal Refund: 2,527    NJ Refund Amount: 573**

## FAM-02 Conway Scenario

### Step 7      Compare Standard vs Itemized Deductions

TP Form / Note	TS Screen	Notes
	Federal Section Deductions Compare Deductions - Begin	Check to see if using itemized or standard deductions. Itemized = 1,786 Std = 24,400 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: 63,114    Federal Refund: 2,537    NJ Refund Amount: 573**

### Step 8      Health Insurance

TP Form / Note	TS Screen	Notes
Intake Sheet	Left Menu-Health Insurance  <u>Did you, your spouse, or a dependent purchase health insurance via HealthCare.gov or a State Marketplace?</u>	TS – No "Continue"

**Federal AGI: 63,114    Federal Refund: 2,527    NJ Refund Amount: 573**

## FAM-02 Conway Scenario

### Step 9      New Jersey Return

NJ Checklist	State Return –Edit  NJ Property Tax Credit/Deduction         Taxpayer NJ Health Insurance  Basic Information -Edit         Tax -Edit <ul style="list-style-type: none"> <li>• Use Tax on Out of State Purchase</li> </ul>	Hint: Use the NJ Checklist to enter NJ items  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”  TS: Answer is “Yes”  TS: Complete Basic Information. Use NJ checklist page 1 -Basic Information Hint: To select county and municipality select the drop-down arrow and type Hudson. Then scroll down to Jersey City. Hint: Use the “NJ Municipality Code Lookup” in the TaxPrep4Free Preparer’s Page to determine the county if you are not sure.  Hint: Use scratch pad to determine Use tax on TV purchase = \$99.38  Save back to the beginning of the State Return for the refund monitor to update.
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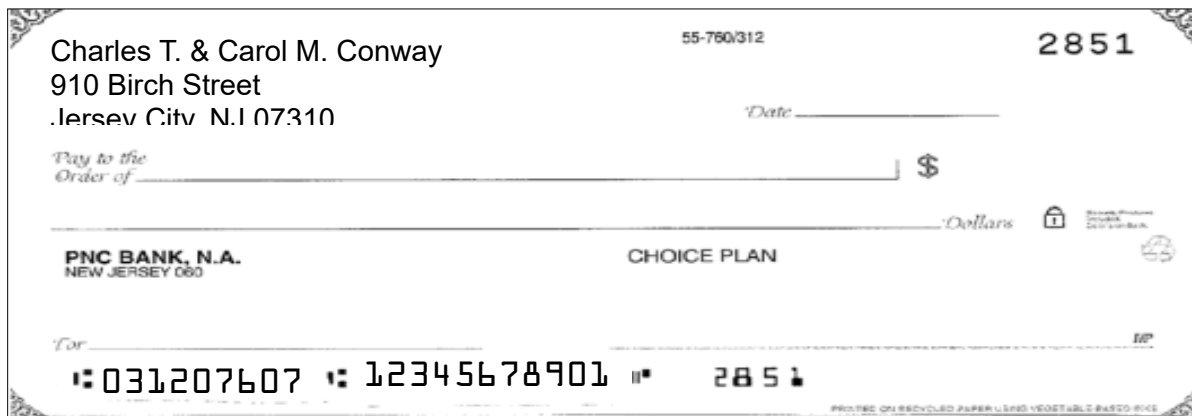
**Federal AGI: 63,114    Federal Refund: 2,527    NJ Refund Amount: 553**



## FAM-02 Conway Scenario

### Step 10 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: Direct Deposit” Next
	Fees	TS: No entries in Fees section except for Client email address Next
	State Return Type	TS: Select State Refund Type “E:file: Direct Deposit” Next
	Bank Accounts	TS: Enter Bank Information – <ul style="list-style-type: none"> <li>Account Type - Checking</li> <li>Name of Bank not required.</li> <li>Deposit amount is required. Click “PULL REFUND”</li> <li>Enter Routing and Account numbers twice</li> </ul> “ 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 and SP. “Next”
	Questions	TS – Questions – Answer questions from Intake sheet Part VII, lines 5,6,7 and 8 <ul style="list-style-type: none"> <li>If there are no questions, just ignore for now.</li> </ul> Next
	Taxpayer ID Information	TS: Skip TP ID Information Screen. Not required for NJ. Save
		You are Done



**Federal AGI: 63,114      Federal Refund: 2,527      NJ Refund Amount: 553**