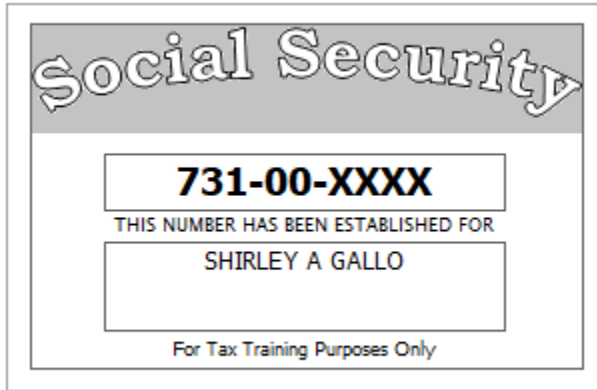


FAM-03 Gallo Scenario

Step 0 Intake + Interview → Filing Status, Dependency

Documents:



Step 1 Basic Information

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
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	Hint: Enter all information using "Caps Lock" Hint: Use Name and SSN from SS card. (Not Intake Sheet) Hint: SSN format YYY-00-XXXX. YYY= from SS card. XXXX = any 4 digit number 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"> Can be claimed as a dependent on someone else's return Is claimed as a dependent on someone else's return Over 18 and full time student TP wishes to contribute \$3 to the Presidential Election Campaign Fund TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required Hint: Did you enter the apt. number? TS: New Jersey will default as the Resident State. TS: "Continue"

FAM-03 Gallo 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: The answer is "No" since she lives with her parents</p> <p>TS Answer: "Yes". Her parents are responsible for her health insurance since she is a dependent.</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

Step 2 W-2 The Kansas City Steak House

<p>W-2 The Kansas City Steak House</p>	<p>Left Menu - Federal Section Income W-2 Wages and tax statement "Begin"</p> <p>Complete W-2 Information-</p>	<p>Hint: Make corrections so that information matches the information on the paper W-2</p> <ul style="list-style-type: none"> Add Apt 6A to street address. 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"</p>
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FAM-03 Gallo Scenario

a. Employee's social security number 731-XX-XXXX		Save, accurate, FAST! Use OMB No. 1545-0008				Visit the IRS website at www.irs.gov/efile		
b. Employer identification number (EIN) 73-9000254			1. Wages, tips, other compensation \$4,311.68		2. Federal income tax withheld \$104.00			
c. Employer's name, address, and ZIP code THE KANSAS CITY STEAK HOUSE 341 JOHNSON BLVD KANSAS CITY, MO 64141			3. Social security wages \$4,311.68		4. Social security tax withheld \$267.32			
			5. Medicare wages and tips \$4,311.68		6. Medicare tax withheld \$62.52			
			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 SHIRLEY A GALLO 2715 AMOS ST APT 6A MANAHAWKIN, NJ 08050			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 18.32			12c.		
			NJSDI 7.33			12d.		
			NJFLI 3.45			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	739000254	\$4,311.68	19.00					

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: 4,312 Federal Refund: 104 NJ Refund Amount: 19

Step 3 Interest 1099-INT

1099-INT Big Bank	Federal Section 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 Hint: Since the interest is tax exempt both Federal and State, there is no adjustment required for the State. “Continue”
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FAM-03 Gallo Scenario

<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 BANK 67 MONEY LANE MANAHAWKIN, NJ 08050		Payer's RTN (optional) 1 Interest income 2 Early withdrawal penalty		OMB No. 1545-0112 2019 Form 1099-INT		Interest Income
PAYER'S TIN 21-1000254		RECIPIENT'S TIN 731-XX-XXXX		3 Interest on US Savings Bonds and Treas. obligations 4 Federal income tax withheld 5 Investment expenses 6 Foreign Tax Paid 7 Foreign Country or US possession 8 Tax exempt interest \$23.00 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		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
RECIPIENT'S name Street address (including apt.no.) City or town, state or province, country, ZIP or foreign postal code SHIRLEY A GALLO 2715 AMOS ST APT 6A MANAHAWKIN, NJ 08050		FATCA filing requirement <input type="checkbox"/>		14 Tax-exempt and tax credit bond CUSIP no. 15 State 16 State Identification no. 17 State tax withheld		
Account number (see instructions)						
Form 1099-INT						

The tax-exempt interest received was from a NJ Turnpike Bond and it is tax exempt in NJ.

Federal AGI: 4,312 Federal Refund: 104 NJ Refund Amount: 19

Step 4 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: 4,312 Federal Refund: 104 NJ Refund Amount: 19

FAM-03 Gallo Scenario

Step 5 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 = \$47 Std = \$4,662 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: 4,312 Federal Refund: 104 NJ Refund Amount: 19

Step 6 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: 4,312 Federal Refund: 104 NJ Refund Amount: 19

FAM-03 Gallo Scenario

Step 7 New Jersey Return

TP Form / Note	TS Screen	Notes
NJ Checklist	State Return –Edit NJ Property Tax Credit/Deduction Taxpayer NJ Health Insurance Basic Information – “Edit”	Hint: Use the NJ Checklist to enter NJ items TS: Answer “No” TS: Answer is “Yes” TS: Complete Basic Information. Use NJ checklist page 1 -Basic Information Hint: Use the “NJ Municipality Code Lookup” in the TaxPrep4Free Preparer’s Page to determine the county if you are not sure. Note in this case Manahawkin is part of Stafford Twp. In Ocean County Hint: To select County and municipality of your current residence, select the drop-down arrow and type Ocean. Then scroll down to Stafford Twp. “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: 4,312 Federal Refund: 104 NJ Refund Amount: 19

FAM-03 Gallo Scenario

Step 8 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 Deny because she did not sign the Consent Form. No pin or date required.
	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: 4,312

Federal Refund: 104

NJ Refund Amount: 19