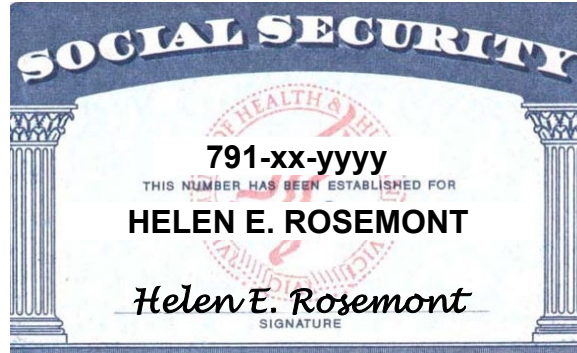


FAM-05 Rosemont Scenario

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	Enter the TP SSN twice Hint: SSN format YYY-00-XXXX. YYY= from SS card. XXXX = any 4 digit number
	Available Taxpayer Profiles "Start Return"	Ignore the Profiles
Intake Sheet	What is your filing status?	TS Answer: Filing Status: Married Filing Separate "Continue" TS: Do not check "Check here if the Spouse lived with the Taxpayer at any time during the year". TS: "Continue"

FAM-05 Rosemont Scenario

TP Form / Note	TS Screen	Notes
SS Card Intake Sheet	Personal Information Taxpayer Information Address & Phone Number	<p>TS: Enter all information using "Caps Lock"</p> <p>Hint: Use Name and SSN from SS card. (Not Intake Sheet)</p> <p>Hint: SSN format YYY-00-XXXX. YYY= from SS card. XXXX = any 4 digit number</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"> • Presidential Election Campaign Fund for TP <p>TS: The only spouse information that is required is his name and SSN.</p> <p>TS: Enter Zip code- TaxSlayer fills in city and state.</p> <ul style="list-style-type: none"> • Correct if required <p>TS: New Jersey defaults as the Resident State</p> <p>TS: Telephone number is important for client contact if an issue arises</p> <p>TS: "Continue"</p>
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</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

FAM-05 Rosemont Scenario

Step 2 W-2 Hair Do Salon

TP Form / Note	TS Screen	Notes
W-2 Hair Do Salon	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 <ul style="list-style-type: none"> Add Apt number 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: Check the amounts in boxes 3,4,5,6</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: Warning – Select Cancel and check boxes 3 & 4. If correct select "Continue"</p> <p>TS: Warning screen - "Continue"</p>

	a. Employee's social security number 791-XX-XXXX	Save. accurate, FAST! Use		Visit the IRS website at www.irs.gov/efile		
b. Employer identification number (EIN) 98-9000254		1. Wages, tips, other compensation \$26,482.00		2. Federal income tax withheld \$1,872.00		
c. Employer's name, address, and ZIP code HAIR DO SALON 90 MAIN STREET MEDFORD, NJ 08055		3. Social security wages \$23,834.00		4. Social security tax withheld \$1,641.88		
		5. Medicare wages and tips \$26,482.00		6. Medicare tax withheld \$383.99		
		7. Social security tips \$2,648.00		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 HELEN E ROSEMONT 22 RIVER ROAD APT 5E MEDFORD, NJ 08055		11. Nonqualified plans		12a. See instructions for box 12		
		13. Statutory Employee Retirement Plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b.		
		14. Other NJSUI 112.55		12c.		
		NJSDI 45.02 NJFLI 21.19		12d.		
15. State NJ	Employer's state ID number 989000254	16. State wages, tips, etc. \$26,482.00	17. State income tax 329.84	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: 26,482
Federal Refund: 353
NJ Refund Amount: -46

FAM-05 Rosemont Scenario

Step 3 Unemployment 1099-G

TP Form / Note	TS Screen	Notes
1099-G NJ Dep of Labor	Federal Section Income Form 1099-G Box 1 Unemployment Compensation 1 – Begin Add or Edit a 1099-G - Begin	TS: This 1099G worksheet is for the:Taxpayer 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 \$3,156.00	OMB No. 1545-0120 2019 Form 1099-G	Certain Government Payments
PAYER'S TIN 22-2481818	RECIPIENT'S TIN 791-XX-XXXX	2 State or local income tax refunds, credits or offsets . Box 2 amount is for tax year	4 Federal income tax withheld \$315.60
RECIPIENT'S name Street address City or town, state or province, country, ZIP or foreign postal code HELEN E ROSEMONT 22 RIVER ROAD MEDFORD, NJ 08055	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"/>	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.
Account number (see instructions)	10. State -----	10b State identification no. -----	11 State income tax withheld -----
Form 1099-G			

Federal AGI: 29,638 Federal Refund: 291 NJ Refund Amount: -46

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	TS: Go to ADD SALES TAX WORKSHEET and enter ZIP Code and 365 days living in NJ "Continue"

Federal AGI: 29,638 Federal Refund: 291 NJ Refund Amount: -46

FAM-05 Rosemont Scenario

Step 5 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 = \$509 Std = \$12,200 Continue” Hint: You can view Schedule A (Itemized Deductions) by clicking on the Print Icon next to Itemized Deductions in the Deductions Menu. “

Federal AGI: 29,638 Federal Refund: 291 NJ Refund Amount: -46

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: 29,638 Federal Refund: 291 NJ Refund Amount: -46

FAM-05 Rosemont Scenario

Step 7 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: The Rosemonts did not live together at any time in 2019 Hint: Taxpayer was a Renter “SAVE”
	T	
	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 Burlington. Then scroll down to Medford Twp 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: 29,638 Federal Refund 291 NJ Refund Amount: 7

FAM-05 Rosemont Scenario

Step 8 Prepare for e-file

TP Form / Note	TS Screen	Notes
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 Account Information	Enter Bank Account information. The bank name is not required. Click “Pull Refund” to deposit the full amount. 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 Since the TP did not sign the consent form. No PIN or date required 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

HELEN E ROSEMONT 1234
 90 MAIN STREET
 MEDFORD, NJ 08055

PAY TO THE ORDER OF _____ \$ _____
 _____ DOLLARS

Your Bank
 Bank City, State, ZIP Code

For _____

|: 031207607 |: 123123123 **1234**

Federal AGI: 29,638 Federal Refund: 291 NJ Refund Amount: 7