

FAME-00 White Refund Monitor

Step	TP Form / Note	TS Screen	Federal Refund	NJ Refund	Notes
1		Basic Information – Filing Status			
	Intake Sheet	What is your filing Status?			Select Filing status from drop down. Answer: Filing Status: Married filing jointly
	SS Card Intake Sheet I-Note 1 &6	Personal Information Taxpayer Information Spouse Information Address & Phone Number			Hint: Use Name and SSN from SS card. (Not Intake Sheet) Hint: SSN format YYYY-00-0752 TS: Birth date can be entered using drop down menu or filling in the field. A zero is not required for single digit numbers. TS: Check any of the “Check here” questions that apply – 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: Resident State should be New Jersey
	Intake Sheet	Just a Few More Questions			Answer questions on this screen Hint: Select Municipality from drop down menu (Listed by county). Start typing Morris to quickly scroll down Hint: Enter TP and SP Pin for now (Any 5-digit number) CLICK CONTINUE TO SAVE
		Dependents/ Qualifying Person -Begin			Hint: youngest to oldest is not required
		Dependent/Qualifying Child Information			Add dependent information Hint: Use name and SSN from SS card (Not Intake Sheet) Answer: SSN format = YYYY-00-0752 Check the “Check if” questions that apply CLICK CONTINUE TO SAVE Add a Dependent or Qualifying Child Add second dependent information
		Let’s look at the money You earned – Enter Myself			
		Income			
		IRA/Pension Distributions - Begin			
2		Social Security 1099 SSA	1,333	0	Hint: Use TP4F Scratch Pad to document Medicare Parts B, C, D. Insert total in “Taxpayer’s Medicare Premiums”.
3	W-2 Green Grass Golf	W2	5,484	1,256	TS: All corrections are made in the appropriate box. No need to check an override button. TS: Special characters are taken out by TaxSlayer when entry is saved.

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					<p>Hint: If taxpayer's name, or address is different than the W-2, make corrections in TaxSlayer.</p> <p>Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct</p> <p>Hint: Always round up for amounts ending in --.50</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>TS: Click continue on NJ warning</p>
		W-2 Wage Statement			Click "Add" a W-2
4	W-2 Joe's #1 Bar & Grill	W2	8,004	1,579	<p>Hint: If taxpayer's name, or address is different than the W-2, make corrections in TaxSlayer</p> <p>Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct</p> <p>Hint: Check boxes 4-7 for correct entries</p> <p>TS: Entering amounts in box 7 or box 12 do not adjust boxes 3 or 5. Make changes manually</p> <p>Hint: Always round up for amounts ending in --.50</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>TS: Click continue NJ warning</p>
5	G-Note 1	State & Local Refunds	8,004	1,579	Hint: Since the Whites did not itemize last year, no action is required on this page even if there was a refund
6	1099-INT National City Bank	Interest Income	8,004	1,575	Hint: Select for Taxpayer Enter values that apply
7	1099-DIV Dreyfus	Dividend Income	8,068	1,562	Complete Dividend Income
8	1099-R Fidelity Investments	Form 1099-R	8,190	1,389	<p>Hint: "This 1099-R is for the:" Taxpayer</p> <p>TS If taxpayer's name, or address is different than the 1099-R, make corrections in TaxSlayer</p> <p>TS: You do not have to select a State for income to go to the State return.</p>
9	1099-G NJ Dep of Labor	Unemployment Income	6,447	830	<p>TS:: This 1099G worksheet is for the: Spouse</p> <p>Hint: Phone number not required</p> <p>Hint: State information not required</p>
10	W2-G NJ Lottery	W-2G Gambling Winning	5,795	697	<p>TS: W-2G is for spouse</p> <p>TS: Correct payee address if different from W2-G</p>

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					TS: Payer phone number not required
11	W2-G Big Casino	W-2G Gambling Winning	5,484	634	TS: W-2G is for spouse TS: Correct payee address if different from W2-G TS: Payer phone number not required
12	Gambling Losses Note on Page 7	Schedule A- Miscellaneous Deductions	5,484	634	Enter gambling losses to the extent of gambling winnings Hint: Gambling losses cannot exceed gambling winnings
13	Gambling Losses Note on Page 6	New Jersey Checklist	5,484	634	Hint: Enter gambling winnings on NJ checklist Hint: Enter NJ lottery winnings < \$10,000 on NJ checklist Hint: Enter gambling losses on NJ checklist
14	1099-B Capital Gains	Capital Gains & Losses	5,484	634	
15	Deductions on page 8	Schedule A – Medical Deductions	5,484	789	Enter Medical expenses Hint: Select “Edit Premiums” at the bottom of the screen to enter Long Term Care Premiums Question: Why did NJ refund change?
16	Deductions on page 8	Schedule A Gifts to Charity Information	5,504	789	Enter Cash and Non-Cash Contributions less than \$500 Hint: You can use the override button to just include the total of all cash contributions. Use TaxPrep4Free scratch pad to document if required.
17	Deductions on page 8	Schedule A – Miscellaneous Deductions	5,504	789	Enter Safe Deposit Box
18	I-Note 4	Schedule A Taxes You Paid	5,996	789	Enter property taxes paid Hint: Note property taxes paid on NJ checklist Go to the Sales Tax Worksheet and enter 365 days living in NJ
19		Compare Standard vs Itemized Deductions	5,996	789	Check to see if using itemized deductions or standard deductions. Itemized = 18,949 Std = 13,850
20	I-Note 2	Student Loan Interest Deduction	6,043	799	Enter Student Loan Interest
21	G – Note 2	Health Insurance	6,043	799	Complete the questions in the Health Insurance Section
21	Complete NJ return		6,043	799	Use the NJ checklist to enter items into the NJ return.
22		New Jersey Income Subject to tax Gambling Winnings	6043	799	Enter gambling winnings from NJ checklist
23	I-Note 3 & 4	New Jersey Credits Property Tax Credit/Deduction	6,043	849	Answer questions Use NJ checklist to determine the proper value for Property Tax Paid Hint: Property Taxes Paid = (rent*.18) + Property taxes paid= \$6,154

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24	DD Information	Left Menu – e-file –	6,043	849	<p>TS – Clear up any diagnostic messages (if any)</p> <p>TS – Answer EIC questions</p> <p>TS – Ignore Fees section</p> <p>TS – Enter Client Email</p> <p>TS – Pin numbers for e-file are automatically selected</p> <p>TS – Complete Bank Information for Direct Deposit - Next</p> <p>TS – Complete State return(s) section – Direct Deposit – Next</p> <p>TS – Third party designee – Ignore – Out of Scope - Next</p> <p>TS – Questions – Answer questions from Intake sheet, Part VII, lines 4 & 5 – Save</p> <p>E-File SAVE does not work in Practice Lab</p>
25		Submission Screen	6,043	849	<p>Click “Ready for Review “at the bottom of the page. You are done. Ready for QR.</p>