

FAM-00 Brown Refund Monitor

TP Form / Note	TS Screen	Federal Refund	NJ Refund	Notes
Basic Taxpayer, Spouse and Dependent Information				
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 Tax payer Information Spouse Information Address & Phone Number			Hint: Use Name and SSN from SS card. (Not Intake Sheet) Hint: SSN format YYY-00-0752 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 – 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
	Dependents/ Qualifying Person -Begin			
	Dependent/Qualifying Child Information			Add dependent information Hint: Use name and SSN from SS card (Not Intake Sheet) Answer: SSN format = YYY-00-0752 Check the “Check if” questions that apply Answer: Both dependents are full time students Add second dependent information
Open NJ Return				
2	Left Menu – State Section – Add State Return			
	Your Federal Return is Complete – Add State Return			
	Select Your State			Choose New Jersey from drop down Menu or Map
	Select your New Jersey Return Residency			Select “Resident”
Intake Sheet	New Jersey State Return			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) CONTINUE
	Congratulations! You have completed your standard New Jersey state return!			Answer Yes to this question and then CONTINUE. We will come back to the NJ return later
	New Jersey State Return			Hint: Keep clicking CONTINUE until you get back to the first NJ screen.
Federal Documents				
	Left Menu – Federal Section			
	Let’s look at the money You earned – Enter Myself			

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		Income			
		IRA/Pension Distributions - Begin			
3		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".
4	W-2 Green Grass Golf	W2	7,856	1914	Hint: Make corrections so that information matches the information on the 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 on NJ warning
		W-2 Wage Statement			Click "Add" a W-2
5	W-2 Joe's #1 Bar & Grill	W2	4,521	662	Hint: Make corrections so that information matches the information on the 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: Check boxes 4-7 for correct entries 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 on NJ warning
6	1099-INT National City Bank	Interest Income	4,366	624	Hint: Select for Taxpayer Enter values that apply
7	1099-DIV Dreyfus	Dividend Income	4,081	524	Complete Dividend Income
8	1099-R Fidelity Investments	Form 1099-R	2,256	94	Hint: "This 1099-R is for the:" Taxpayer Hint: Make corrections so that information matches the information on the W-2 TS: You do not have to select a State for income to go to the State return.

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9	1099-G NJ Dep of Labor	Unemployment Income	1,727	94	TS: This 1099G worksheet is for the: Spouse Hint: Phone number not required Hint: State information not required
Federal Deductions, Adjustments & Credits					
		Federal Section – Deductions - Adjustments			
10	I-Note 2	Student Loan Interest Deduction	1,750	94	Enter Student Loan Interest
11	I-Note 4	Federal Section -Deductions – Itemized Deductions - Taxes You Paid	1,750	94	Enter property taxes paid Go to the Sales Tax Worksheet and enter NJ AND 365 days living in NJ
12		Compare Standard vs Itemized Deductions	1,750	94	Check to see if using itemized deductions or standard deductions. Itemized = 5,360 Std = 13,850
Health Insurance					
13	G-Note 2	Health Insurance			Answer questions in the Health Insurance Section
New Jersey Return					
14		Basic Information	1750	94	Edit and Check Some of the questions may already have been answered
15	I-Note 3 & 4 G-Note 2,3,4	New Jersey State Return -Credits - Property Tax Credit/Deduction	1,750	201	Answer questions Use scratch pad at TP4F to determine the proper value for Property Tax Paid Hint: Property Taxes Paid = (rent*.18) + Property taxes paid= \$6,154 Hint: Taxpayer meets Property Tax Eligibility Requirements
E-file Information					
16	DD Information	Left Menu – e-file –	1.750	201	TS – Clear up any diagnostic messages (if any) TS – Ignore Fees section TS – Enter Client Email TS – Pin numbers for e-file are automatically selected TS – Select Return Type as Direct Deposit - Next TS – Complete Bank Information for Direct Deposit - Next TS – Complete State return(s) section – Direct Deposit – Next TS – Third party designee – Ignore – Out of Scope - Next TS – Questions – Answer questions from Intake sheet, Part VII, lines 4 & 5 – Save E-File SAVE does not work in Practice Lab
Complete Return					
17		Submission Screen	1,750	201	Click “Ready for Review “at the bottom of the page. You are done. Ready for QR.