

FAM-03 Gallo Refund Monitor

Step	TP Form / Note	TW Screen	Federal Refund	NJ Refund	Notes
Basic Taxpayer, Spouse and Dependent Information					
1		Basic Information – Filing Status			
	Intake Sheet/ Interview	What is your filing Status?			Select Filing status from drop down. Answer: Filing Status: Single
	SS Card Intake Sheet I-Note 1-3	Personal Information Taxpayer 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. TS: Check any of the “Check here” questions that apply – Can be claimed as a dependent on someone else’s return Student TS: Enter Zip code- TaxSlayer fills in city and state. Correct if required
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 G-Note 2 & 3	New Jersey State Return			Answer questions on this screen Hint: Select Municipality from drop down menu (Listed by county). Manahawkin is part of Stafford Twps. in Ocean County. Use Municipality lookup inTaxPrep4Free.org Hint: Enter TP Pin (Any 5-digit number) Hint: Do not go beyond this screen. We will add additional items to NJ later in the problem
		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					
		Begin to Enter Tax Documents			
		Left Menu -Federal Section Look at the money you earned – Enter myself			

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3	W-2 The Kansas City Steak House	W2	104	19	Hint: Make corrections so that information matches the information on the W-2 Hint: "Check if this is the taxpayer's address shown on the W-2" – Checked – Change to match W-2 if required. Answer: Add Apt 6A 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
4	1099-INT Big Bank	Tax Exempt Interest Income	104	19	
Federal Deductions, Adjustments & Credits					
		Federal Section – Deductions - Adjustments			
5		Federal Section -Deductions – Itemized Deductions - Taxes You Paid	104	19	Go to the Sales Tax Worksheet and enter NJ AND 365 days living in NJ
6		Compare Standard vs Itemized Deductions	104	19	Check to see if using itemized deductions or standard deductions. Itemized = 52 Std = 4662
Health Insurance					
5	Intake Sheet G-Note-2	Health Insurance	104	19	Answer questions in the Health Insurance Section. Since Shirley is being claimed on her parents return, she has no responsibility for health insurance on her return. Consider her covered for the entire year.
New Jersey Return					
6	G-Note-2,3,4	State Section – Basic Information	104	19	Edit and Check Some of the questions may already have been answered
7	Complete NJ Return				Since she is being claimed on her parent's return, there are no other NJ items
E-File Information					

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8	Intake Sheet G-Note 5 & 7	Left Menu – e-file –	104	19	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 Electronic Mailed - Next TS – Complete State return(s) section – Electronic Mailed– 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					
9		Submission Screen	104	19	Click “Ready for Review “at the bottom of the page. You are done. Ready for QR