Stress Points & Review

Anderson

* Always use the name and SSN from the SS document
* Any questions on the main info sheet?
* Any questions on the prep use form
* W-2 –
  + Always check Taxpayer or spouse on the top of the form
  + Info entered on the TaxWise W-2 to be identical to the paper W-2
  + Discuss entering employer’s name and what do if it auto fills
  + Questions on entering W-2
* Review how to get the red out
* Diagnostics and create an E-file
* Discuss NJ Wkt F
* NJ DD worksheet
  + Difference from Federal
  + Foreign Bank Question

Conway

* Review Field Help
* Main Infor – Last name the same
* W-2
  + Always check “Taxpayer” or “Spouse” on the top of the form
  + Discuss the “Please verify the Federal Withholding….” Line
  + Discuss entering box 12 first and how to correct boxes 3,4,5,6
  + Discuss What to do if box 16 is different
* Questions on 1099G Unemployment
* Discuss direct deposit
* Look at NJ DD wkt and how it is completed for direct deposit

Gallo

* Discuss “Taxpayer can be claimed…..”

Patterson

* Questions on entering SS
  + Scratch pad for multiple item (Medicare)
* Questions on Interest Statement
* Questions on entering property tax
* Discuss entering property tax on Wkt F

McCook

* Discuss Dividend statement
* Questions on 1099-R
  + How to add a second 1099R

Barufkin

* Review entering Dependents
  + Youngest to oldest
  + Always check EIC
* Schedule EIC and EIC worksheet
  + Answer only questions in red
  + Answer in order
* Demo MFS comparison

Jackson

* Head of household – red fields after entering the filing status
* Student Loan Interest – How to add a form – How to determine what form to add

Rosemont

* Married Filing Separately
  + Must enter spouse’s info
* W-2 – Social Security Tips