

## FAM-01 Anderson Refund Monitor

Step	TP Form / Note	Sub	TW Screen	AGI	Refund	NJ 39	NJ 56/66	Notes
0	SS Card Andrea 711-XX-XXXX		New Return					Hint: 711-[your 2-digit unique number]-[last 4 digits of EFIN] (TW will automatically add dashes)
1	Intake Sheet G-Note 3	a	Main Info					Hint: Use TP/SP name from SS Card (NOT Intake Sheet) Hint: Address, Email, Telephone, Birthdate, Occupation, Blind, Disabled from Part I of Intake Sheet Hint: Presidential Election Campaign from Intake Sheet, page 3, part VII, line 1 Answer: Filing Status: Single Hint: Ctrl-E to go to next red field Hint: TP/SP PIN – any 5 digits (except 00000) Check: Main Info should be green in tree at this point
		b	NJ 1040 Pg1					Answer: NJ County/Municipality Code: 0213
		c	NJ 1040 Pg 2					Hint: Gubernatorial Elections Fund – use same choices as the federal Presidential Election Campaign Fund, TW entry is different
		d	Prep Use					Hint: 11 & 12: Enter from page 3, part VII, line 4 & 5 13: Your initials 14: Leave empty and red for QR initials
<b>Tax Documents &amp; Notes</b>								
2	W-2 Billings Market		W2	26,298	635	25,298	29	Hint: This W2 statement is for the: Taxpayer TW: Check if this is the taxpayer's address shown on the W-2 – Checked Hint: If the name and address of the employer come up after inputting the employer Identification Number, check that the information is correct and take the red out of the fields (Ctrl-Space or F3 key) Hint: Box 14 NJ amounts may be in any order; be sure to put the amounts on the correct line
<b>Get Red Out (Federal)</b>								
3	G-Note 1		1040 Pg 1	26,298	635	25,298	29	TW (before line 10): Did you itemize deductions last year and receive state or local tax refunds, credits, or offsets? – No
4	Intake Sheet G-Note 2		1040 ACA Wkt	26,298	635	25,298	29	Hint: For every person on the tax return with MEC, check the "Full" box for that person on the ACA Wkt
5			Diagnostics	26,298	635	25,298	29	BP: Resolve any federal errors before proceeding
<b>New Jersey extra stuff</b>								
6	G-Note 4		NJ 1040 Pg 3	26,298	635	25,298	29	Hint: Use Ctrl-Space or F3 key to remove red from line 45
7	I-Note 1		NJ 1040 Pg 3	26,298	635	25,298	79	Hint: Rent goes on Worksheet F
<b>Get Red Out (NJ)</b>								
8			NJ 1040 Pg 2	26,298	635	25,298	79	Hint: If NJ 1040 Pg 2 is red in the tree because line 19b is made red in your template, just use F3 or Ctrl-Space to take the red out – There are no excludable Pensions, etc.
9			Diagnostics	26,298	635	25,298	79	BP: Resolve any federal or NJ errors before proceeding

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<b>Handle Refund / Amount Due</b>								
10	G-Note 5 G-Note 6		NJ DD Wkt	26,298	635	25,298	79	TW: Check here to have a refund check mailed to you – Check this
11			Diagnostics	26,298	635	25,298	79	BP: Resolve any federal or NJ errors before proceeding
12			Create e-File	26,298	635	25,298	79	BP: Resolve any errors before proceeding
<b>Ask your Coach to do QR</b>								