FAM-06 Barufkin Refund Monitor

Step	TP Form / Note	Sub	TW Screen	AGI	Refund	NJ 39	NJ 56/66	Notes

1	Intake Sheet G-Note 3	a	Main Info					Answer: Filing Status: Married filing jointly
								BP: List dependents from youngest to oldest
								Hint: Dependent name: Samual (from SS Card) (Note can leave Last name blank if same as primary TP)
								   Answer: Code=1, DC=No, EIC=Yes, CTC=automatic
								Hint: Dependent name: Alice Nagesh (from SS Card)
								   Answer: Code=1, DC=No, EIC=Yes, CTC=automatic
								Check: Main Info should be green in tree at this point

		b	NJ 1040 Pg1					Answer: NJ County/Municipality Code: 0270
		c	NJ 1040 Pg 2					Gubernatorial Elections Fund
		d	Prep Use					TW: If language is not in list, just type it in
Tax Documents & Notes								
2	W-2 (TP) United Airlines		W2	22,810	6,586	17,810	1,095	TW: "This W2 statement is for the:" Taxpayer Hint: If the checkbox for "Please verify the Federal withholding, …" turns red, double check your entries in Box 1 & 2, then check the box
3	W-2 (SP) United Airlines		W2	35,990	4,051	30,990	727	Hint: Use + next to existing W2 in tree (or Add button above tree) to add another W2 TW: "This W2 statement is for the:" Spouse 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
Get Red Out (Federal)								
4	G-Note 1		1040 Pg 1	35,990	4,051	30,990	727	TW (before line 10): "Did you itemize deductions last year and receive state or local tax refunds, credits, or offsets? …" – No
5	Intake Sheet G-Note 2		1040 ACA Wkt	35,990	4,051	30,990	727	Hint: For every person on the tax return with MEC, check the "Full" box for that person on the ACA Wkt
6	Intake Sheet I-Note 2		Sch EIC	35,990	5,560	30,990	1,028	BP: Answer questions in order from top to bottom and left to right BP: Answer only those questions that are red and wait for redness to automatically adjust after each answer
7	Intake Sheet G-Note 7		Sch EIC Wkt	35,990	5,560	30,990	1,028	BP: Answer questions in order from top to bottom and left to right BP: Answer only those questions that are red and wait for redness to automatically adjust after each answer
8			Diagnostics	35,990	5,560	30,990	1,028	BP: Resolve any federal errors before proceeding

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New Jersey extra stuff								
9	G-Note 4		NJ 1040 Pg 3	35,990	5,560	30,990	1,028	Hint: No unpaid Use Tax, so use Ctrl-Space or F3 key to remove red from line 45
10	I-Note 1		NJ 1040 Pg 3	35,990	5,560	30,990	1,078	Hint: Rent goes on Worksheet F
Get Red Out (NJ)								
11			NJ 1040 Pg 2	35,990	5,560	30,990	1,078	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.
12			Diagnostics	35,990	5,560	30,990	1,078	BP: Resolve any federal or NJ errors before proceeding
Handle Refund / Amount Due								
13	Intake Sheet G-Note 5		NJ DD Wkt	35,990	5,560	30,990	1,078	TW "Check here to have a refund heck mailed to you." – Check this
14			Diagnostics	35,990	5,560	30,990	1,078	BP: Resolve any federal or NJ errors before proceeding
15			Create e-File	35,990	5,560	30,990	1,078	BP: Resolve any errors before proceeding
Ask your Coach to do QR								