

FAM-08 Rosemont Refund Monitor

Step	TP Form / Note	Sub	TW Screen	AGI	Refund	NJ 39	NJ 56/66	Notes
1	Intake Sheet G-Note 3 I-Note 1 I-Note 2	a	Main Info					Answer: Filing Status: Married filing separately Check: Main Info should be green in tree at this point
		b	NJ 1040 Pg1					Answer: NJ County/Municipality Code: 0320
		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					
		e	1040 Pg 2					Answer: Line 39b “If you are married filing separately and ...” – take the red out (F3 or Ctrl-Space) – Checkbox should not be checked – only take red out. [Special itemizing rules apply when filing “Married filing separately”]
Tax Documents & Notes								
2	W-2 Hair Do Salon		W2	26,482	1,977	25,482	154	Hint: If the checkbox for “Please verify the Federal withholding, ...” turns red, double check your entries in Box 1 & 2, then check the box Hint: Entering social security tips in box 7 will automatically adjust box 3 amount
3	1099-G NJ Dept of Labor		1099G Wkt	29,638	1,820	25,482	154	TW: This 1099G worksheet is for the: Taxpayer
Get Red Out (Federal)								
4	G-Note 1		1040 Pg 1	29,638	1,820	25,482	154	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	29,638	1,820	25,482	154	Hint: For every person on the tax return with MEC, check the “Full” box for that person on the ACA Wkt
6			Diagnostics	29,638	1,820	25,482	154	BP: Resolve any federal errors before proceeding
New Jersey extra stuff								
7	G-Note 4		NJ 1040 Pg 3	29,638	1,820	25,482	154	Hint: No unpaid Use Tax, so use Ctrl-Space or F3 key to remove red from line 45 (Zero and blank are treated the same by TW)
8	I-Note 3		NJ 1040 Pg 3	29,638	1,820	22,458	207	Hint: 1,400 * 12 = 16,800
Get Red Out (NJ)								
9			NJ 1040 Pg 2	29,638	1,820	22,458	207	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.
10			Diagnostics	29,638	1,820	22,458	207	BP: Resolve any federal or NJ errors before proceeding

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Handle Refund / Amount Due								
11	Intake Sheet G-Note 5		NJ DD Wkt	29,638	1,820	22,458	207	TW "Check here to have a refund heck mailed to you." – Check this
12			Diagnostics	29,638	1,820	22,458	207	BP: Resolve any federal or NJ errors before proceeding
13			Create e-File	29,638	1,820	22,458	207	BP: Resolve any errors before proceeding
Ask your Coach to do QR								