

FAM-03 Gallo 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: Single Hint: Check if (a) you can be claimed on another person's return – see Intake Sheet, Part I, line 11 Check: Main Info should be green in tree at this point
		b	NJ 1040 Pg1					Answer: NJ County/Municipality Code: 1531
		c	NJ 1040 Pg 2					Gubernatorial Elections Fund
		d	Prep Use					
Tax Documents & Notes								
2	W-2 The Kansas City Steak House		W2	4,312	104	3,312	19	TW: "This W2 statement is for the:" Taxpayer
Get Red Out (Federal)								
3	G-Note 1		1040 Pg 1	4,312	104	3,312	19	TW (before line 10): "Did you itemize deductions last year and receive state or local tax refunds, credits, or offsets? ..." – No
4			Diagnostics	4,312	104	3,312	19	BP: Resolve any federal errors before proceeding
New Jersey extra stuff								
5	G-Note 4		NJ 1040 Pg 3	4,312	104	3,312	19	Use Tax
Get Red Out (NJ)								
6			NJ 1040 Pg 2	4,312	104	3,312	19	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.
7			Diagnostics	4,312	104	3,312	19	BP: Resolve any federal or NJ errors before proceeding
Handle Refund / Amount Due								
8	Intake Sheet G-Note 5		NJ DD Wkt	4,312	104	3,312	19	TW: "Check here to have a refund check mailed to you." – Check this
9			Diagnostics	4,312	104	3,312	19	BP: Resolve any federal or NJ errors before proceeding
10			Create e-File	4,312	104	3,312	19	BP: Resolve any errors before proceeding
Ask your Coach to do QR								