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