

FAM-02 Conway 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					BP: Do not enter SP last name if same as TP (see field help) Hint: SP SSN, use same rule as for TP (702-[your 2-digit unique number]-[last 4 digits of EFIN]) Answer: Filing Status: Married filing jointly Check: Main Info should be green in tree at this point
		b	NJ 1040 Pg1					Answer: NJ County/Municipality Code: 0906 Hint: Also need to check "Check if your address has changed"
		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					
Tax Documents & Notes								
2	W-2 Vampire Engineering		W2	32,867	3,242	31,505	538	Hint: 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 Hint: Enter the amount in box 12 before attempting to correct the amounts in boxes 3,4,5,6 Hint: if Box 1 and Box 16 are different, you will need to click the "Check to take calculations off of line 16, state wages" checkbox and enter the correct amount in box 16
3	W-2 Smart Kids Charter Schools		W2	53,043	1,699	51,681	578	Hint: Use + next to existing W2 in tree (or link from 1050, line 8 or use Add button above tree) to add another W2 TW: This W2 statement is for the: Spouse
4	1099-G NJ Dept of Labor		1099G Wkt	62,903	1,200	51,681	578	TW: This 1099G worksheet is for the: Taxpayer
Get Red Out (Federal)								
5	G-Note 1		1040 Pg 1	62,903	1,200	51,681	578	TW (before line 10): Did you itemize deductions last year and receive state or local tax refunds, credits, or offsets? – No
6	Intake Sheet G-Note 2		1040 ACA Wkt	62,903	1,200	51,681	578	Hint: For every person on the tax return with MEC, check the "Full" box for that person on the ACA Wkt
7			Diagnostics	62,903	1,200	51,681	578	BP: Resolve any federal errors before proceeding
New Jersey extra stuff								
8	G-Note 3		NJ 1040 Pg 3	62,903	1,200	51,681	473	Answer: Line 45 – Enter 105
9	I-Note 1	a	NJ 1040 Pg 3	62,903	1,200	47,901	550	Hint: Rent goes on Worksheet F – Use Scratch Pad to show calculation
		b	Scratch Pad	62,903	1,200	47,901	550	

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Get Red Out (NJ)								
10			NJ 1040 Pg 2	62,903	1,200	47,901	550	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.
11			Diagnostics	62,903	1,200	47,901	550	BP: Resolve any federal or NJ errors before proceeding
Handle Refund / Amount Due								
12	Intake Sheet Blank Check G-Note 5 G-Note 6	a	Main Info	62,903	1,200	47,901	550	Enter direct deposit routing number (RTN) and account number (DAN) on the Main Info Sheet
		b	1040 Pg 2	62,903	1,200	47,901	550	Enter direct deposit routing number (RTN) and account number (DAN) on the 1040 Pg 2, Line 76
		c	NJ DD Wkt	62,903	1,200	47,901	550	TW: "Check here if you had a Federal refund and want..." – Check this
13			Diagnostics	62,903	1,200	47,901	550	BP: Resolve any federal or NJ errors before proceeding
14			Create e-File	62,903	1,200	47,901	550	BP: Resolve any errors before proceeding
Ask your Coach to do QR								