

FAM-07 Jackson 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: Head of Household Hint: When you click Head of Household, then "...enter the child's name..." box will turn red – ignore for now – the red will go away once you fill in info for the dependent Hint: Dependent name: Elizabeth (No need to fill in last name – same as TP) 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: 1533
		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 Ana's Closet		W2	12,821	4,980	10,321	811	TW: "Check if this is the taxpayer's address shown on the W-2" – Checked Hint: See Field Help for what characters are allowed in Employer name
3	1099-G NJ Dept of Labor		1099G Wkt	19,196	5,184	10,321	768	TW: This 1099G worksheet is for the: Taxpayer
4	I-Note 2		1040 Wkt2	18,518	5,356	10,321	789	Hint: You will need to manually add the 1040 Wkt2 worksheet to the tree, either: a) Use the Add button above the tree; or b) Link from 1040, line 33.
Get Red Out (Federal)								
5	G-Note 1		1040 Pg 1	18,518	5,356	10,321	789	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	18,518	5,356	10,321	789	Hint: For every person on the tax return with MEC, check the "Full" box for that person on the ACA Wkt
7	G-Note 7		Sch EIC Wkt	18,518	5,356	10,321	789	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	18,518	5,356	10,321	789	BP: Resolve any federal errors before proceeding
New Jersey extra stuff								
9	G-Note 4		NJ 1040 Pg 3	18,518	5,356	10,321	789	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)
Get Red Out (NJ)								
10			NJ 1040 Pg 2	18,518	5,356	10,321	789	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	18,518	5,356	10,321	789	BP: Resolve any federal or NJ errors before proceeding

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Handle Refund / Amount Due								
12	Intake Sheet Blank Check G-Note 5 G-Note 6	a	Main Info	18,518	5,356	10,321	789	Enter direct deposit routing number (RTN) and account number (DAN) on the Main Info Sheet Hint: 1040 Page 2 turns red after RTN/DAN entered on Main Info Sheet
		b	1040 Pg 2	18,518	5,356	10,321	789	Enter direct deposit routing number (RTN) and account number (DAN) on the 1040 Pg 2, Line 76 and indicate Checking (not Savings)
		c	NJ DD Wkt	18,518	5,356	10,321	789	TW: "Check here if you had a Federal refund and want..." – Check this TW: "Will the refund or debut you are requesting involve a foreign bank account?" – Check No
13			Diagnostics	18,518	5,356	10,321	789	BP: Resolve any federal or NJ errors before proceeding
14			Create e-File	18,518	5,356	10,321	789	BP: Resolve any errors before proceeding
Ask your Coach to do QR								