

FAM-07 Jackson Refund Monitor

Filing Status: Head of Household

09-28-2012 TY2011 v1.0-1

| Process | Step | TP Form/ Note(s) | TW Form | Payee/Name | AGI | Refund | NJ 37 | NJ 55/65 | Notes |
|--------------------------|------|---------------------------------|--|-----------------------|--------|--------|----------|-------------|---|
| Main Info & Prep Use | 1 | Intake etc. Note 1 Note 5 | Main Info Prep Use | | | | | | Hint: When you select Head of Household as filing status the box by "... enter child's name" turns red – do NOT fill it in – Elizabeth will be listed as a dependent later and the red will go away Hint: Use Code "1 – Your Child who Lives with You" for Elizabeth Hint: Do NOT check the DC box for Elizabeth Hint: Do Check the EIC box for Elizabeth |
| Documents | 2 | W-2 | W-2 | Ana's Closet | 12,821 | 4,769 | | | |
| | 3 | 1099-G | 1099G Wkt | NJ Dept of Labor | 19,196 | 4,682 | | | Hint: 1099G Wkt is already in tree (close under W-2) BP: Round --.50 up |
| Notes | 4 | Note 3 | 1040 Wkt2 | Student loan interest | 18,518 | 4,853 | | | 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 (see Walk Through for details) |
| Remove Red (Fed only) | 5 | Note 4 | 1040 Pg1 | | 18,518 | 4,853 | | | |
| | 6 | Intake Note 6 | Sch EIC Wkt | | 18,518 | 4,853 | | | 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 |
| Run Diagnostics | 7 | | Diagnostics | | 18,518 | 4,853 | | | Errors: None |
| NJ 1040 | 8 | Note 7 | NJ 1040 Pg1 | | 18,518 | 4,853 | 10,321 | 710 | |
| | 9 | Note 5 Note 8 Note 9 | NJ 1040 Pg3 | | 18,518 | 4,853 | 10,321 | 710 | Hint: Use ctrl-Space to remove red from box on line 44 |
| Remove Red | 10 | Intake Check | Main Info 1040 Pg2 NJ DD Wkt | | 18,518 | 4,853 | 10,321 | 710 | Hint: Input federal DD info first, then can just click "Check here if you had a federal refund..." on NJ DD Wkt |

| | | | | | | | | | |
|-----------------|----|--|-----------------------------|--|--------|-------|--------|-----|--|
| | | | | | | | | | Hint: Must type RTN and Acct #s on both Main Info and 1040 Pg2 |
| Run Diagnostics | 11 | | Diagnostics | | 18,518 | 4,853 | 10,321 | 710 | Errors: None |
| Create E-File | 12 | | Diagnostics | | 18,518 | 4,853 | 10,321 | 710 | A second diagnostic is run when creating an efile. Errors: None |
| Quality Review | 13 | | | | 18,518 | 4,853 | 10,321 | 710 | Ask your coach to do QR |

Values with pink background – changed from previous

Click on links in TW Form column to see screen shot of completed TWO form (you may need to click on the picture to enlarge it)

[Printed return – click here](#)

[Scenario Writeup – click here](#)

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