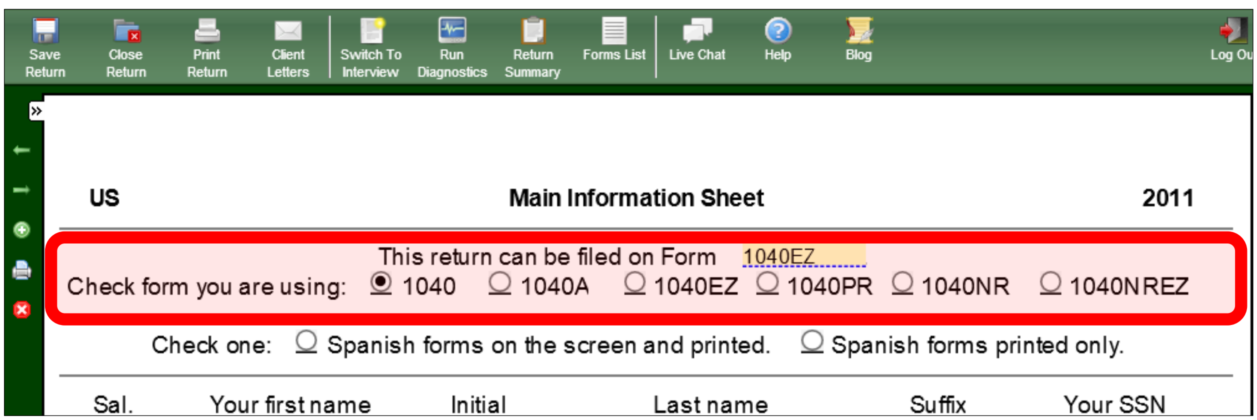
# TWO-81 Main Info and Prep Use Job Aid

When you start a new return, the first thing to do is to fill out the Main Info worksheet and the Prep Use worksheet in TaxWise (TW). This guide covers each section of these worksheets from top to bottom. Many areas do no apply to volunteer preparers. For those areas the do apply, notes will explain where to find the necessary information.

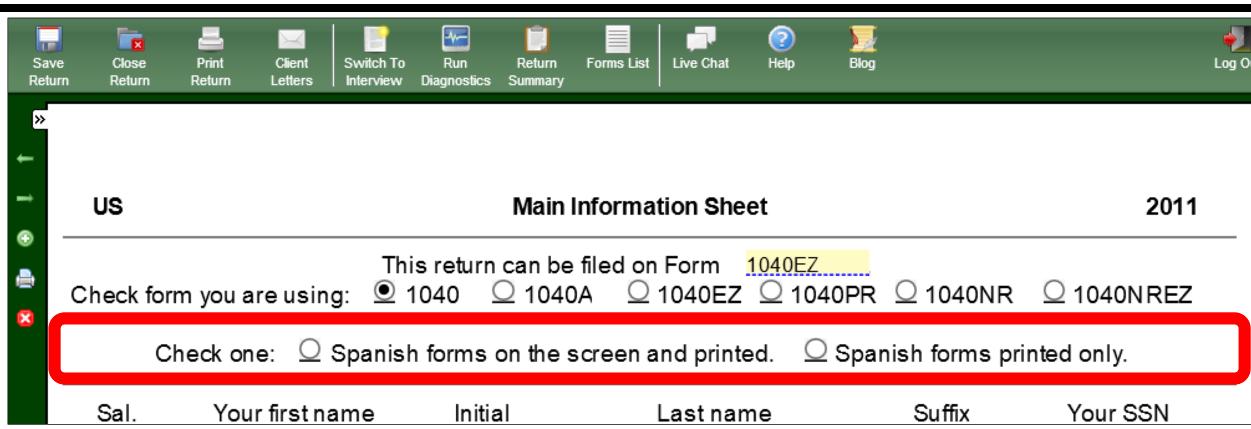
Most of the information you need for these worksheets will come from the standard IRS Intake Sheet (Form 13614-C). You should carefully review the Intake Sheet with the taxpayer (TP) and make sure that all questions are answered properly and completely BEFORE beginning to prepare the return in TaxWise.

This guide is for the 2011 Tax Year – the TaxWise worksheets and the IRS Intake Form usually change each year.

## Main Info



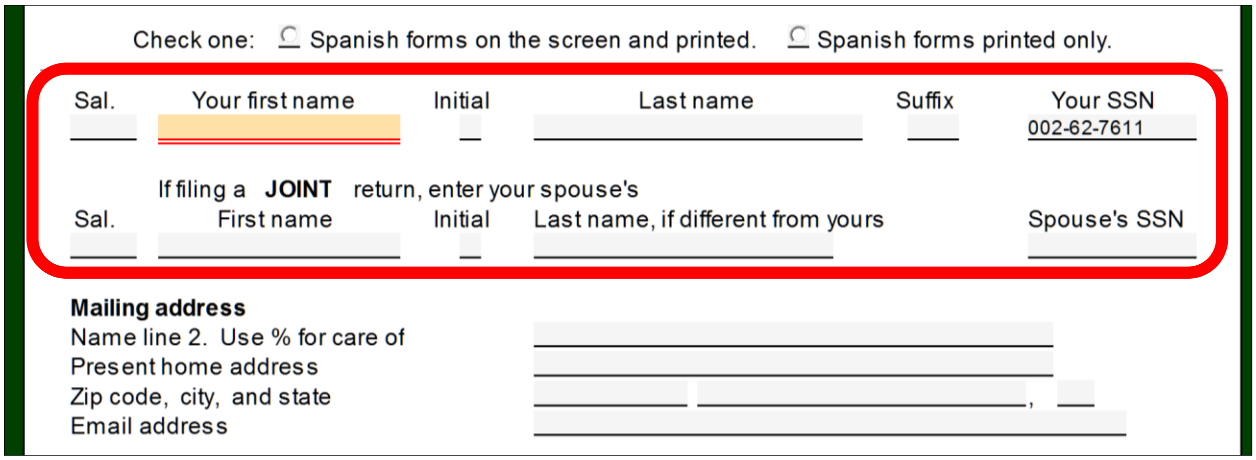

**Ignore this area**




**This is optional**

Note: You will need to close the return and re-open it if for a change in on screen language to take effect.
Note: Not all federal forms are available on screen in Spanish
Note: New Jersey forms are not available in Spanish

# TWO-81 Main Info and Prep Use Job Aid

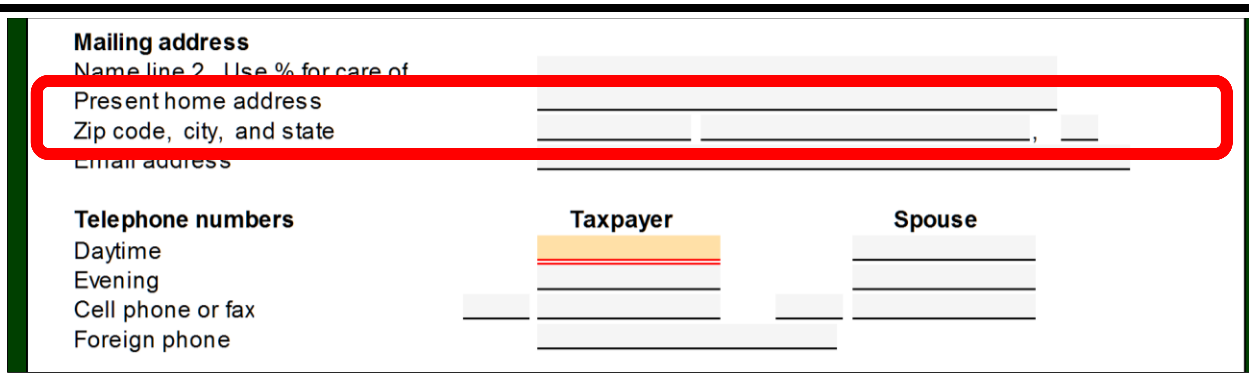



## From Intake Sheet Part I, lines 1 & 2 (except SSNs)

Note: TP SSN entered when return created; Spouse SSN must be entered here
Note: Do NOT enter spouse last name if same as TP
Note: Always double check names against Social Security card (and/or SSA-1099 if applicable)
– e-filed returns will be rejected by IRS if SSN and name are not exact match!


## Only use this box in special circumstances

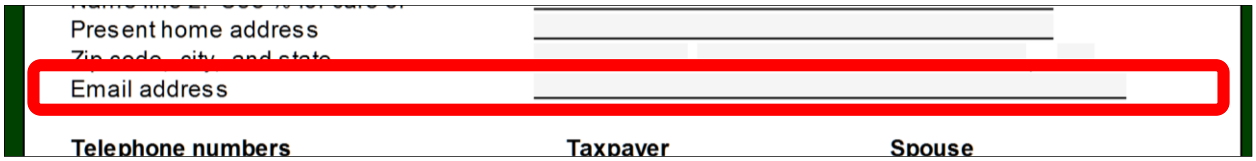
Note: See context sensitive help for details




## From Intake Sheet Part I, line 3

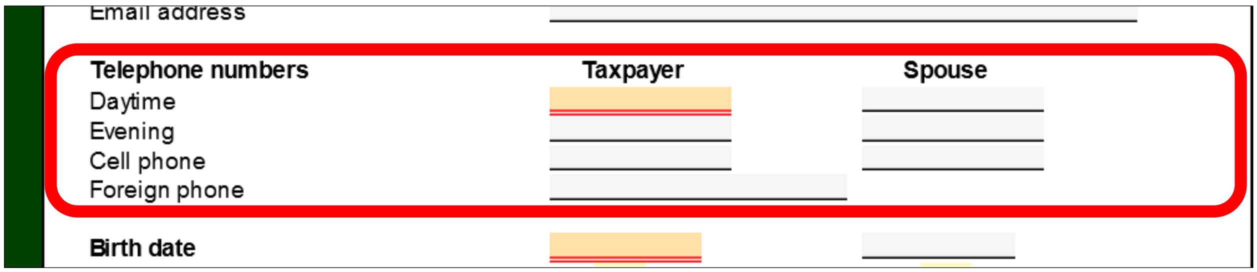
Note: This address will be used by the IRS for all future correspondence with the TP
Note: This address does not need to match the address on other TP documents
Note: Enter zip code first – city and state will be filled in automatically
You may correct city manually if automatic value is incorrect
Note: If foreign address, then leave blank and use Foreign Address area below

# TWO-81 Main Info and Prep Use Job Aid



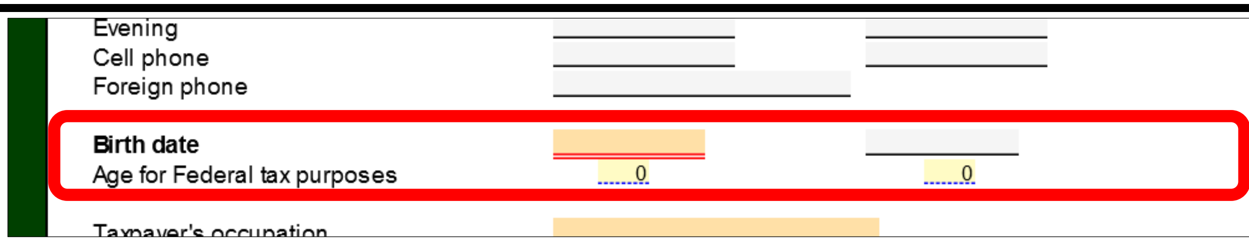

**From Intake Sheet Part I, line 4**

Note: Don't forget Email address (can be helpful in case need to contact TP to resolve reject)
Note: Email addresses are not case sensitive (it is ok to enter in all upper case)



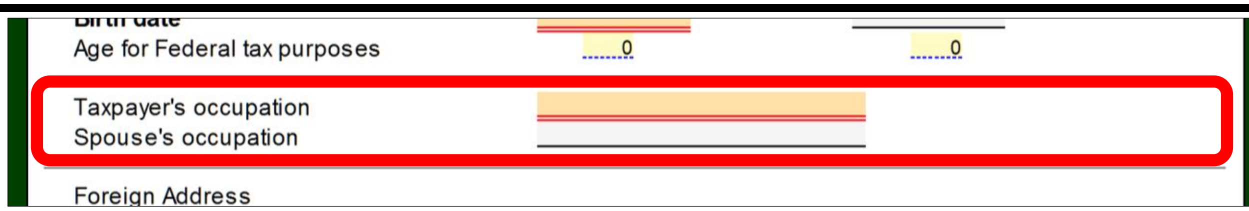

**From Intake Sheet Part I, line 4**

Note: Must have at least one telephone number (in case need to contact TP to resolve a rejected return)
Note: Don't be afraid to ask for additional telephone numbers




**From Intake Sheet Part I, lines 5 & 9**

Note: Enter 2-digit month, 2-digit day, and 4 digit year with no dashes, slashes or other punctuation
Note: **Age for Federal tax purposes** will be calculated automatically




**From Intake Sheet Part I, lines 6 & 10**

Note: Required, but anything accepted (e.g. RETIRED, STUDENT, HOMEMAKER, HOUSEWIFE, UNEMPLOYED, etc. all ok)

# TWO-81 Main Info and Prep Use Job Aid

Taxpayer's occupation
Spouse's occupation

Foreign Address
Foreign street address
Foreign city
Foreign province / state
Foreign Zip code
Combined foreign city / province / Zip
Foreign country. Do not abbreviate
Foreign country code

Taxpayer Information

**See notes for Address above**

Taxpayer Information

Special processing

Are you excluding Puerto Rico income from this tax return? Yes No
If "Yes", enter the amount of income excluded 0

| | Taxpayer | Spouse |
|---|---|---|
| Check if blind | Yes | Yes |

**Ignore these questions – Out of Scope**

Are you excluding Puerto Rico income from this tax return? Yes No
If "Yes", enter the amount of income excluded 0

| | Taxpayer | Spouse |
|---|---|---|
| Check if blind | Yes | Yes |
| Check if totally and permanently disabled | Yes | Yes |
| Date of death, ONLY if in 2011 or 2012 | | |

This tax return is being filed by the surviving spouse or someone else.

**From Intake Sheet Part I, lines 7, 8, 11, and 12**

| | | |
|---|---|---|
| Check if blind | Yes | Yes |
| Check if totally and permanently disabled | Yes | Yes |
| Date of death, ONLY if in 2011 or 2012 | | |

This tax return is being filed by the surviving spouse or someone else.

Presidential | Check here if you, or your spouse if a joint return

**Only use this area in special circumstances**

Note: See context sensitive help for details

# TWO-81 Main Info and Prep Use Job Aid

This tax return is being filed by ☐ the surviving spouse or ☐ someone else.

**Presidential Election Campaign** | Check here if you, or your spouse if a joint return, want $3 to go to this fund ☐ You ☐ Spouse

**Filing Status and Exemptions**

## From Intake Sheet bottom of page 2

Note: TP and Spouse can answer differently
Note: You might as well ask about NJ Gubernatorial Election Campaign at same time
Note: Answer does NOT change refund or amount owed.

**Election Campaign** | want $3 to go to this fund ☐ You ☐ Spouse

**Filing Status and Exemptions**

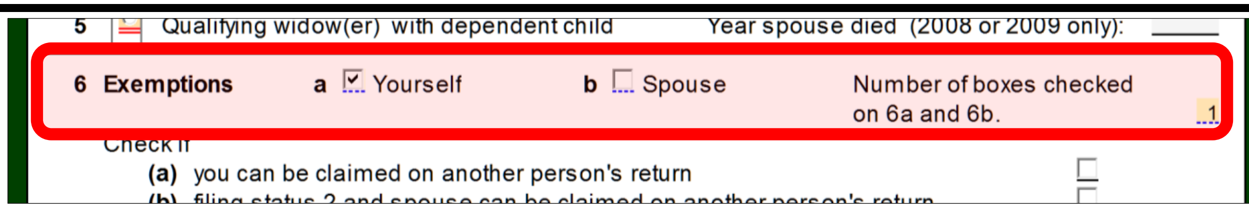
1 ○ Single
2 ○ Married filing jointly (even if only one had income)
3 ○ Married filing separately
Spouse's first name: ______ Last name: ______ SSN: ______
Did your spouse ever live with you in 2011? ○ Yes ○ No
If "Yes", did you and your spouse live together at anytime after June 30, 2011? ○ Yes ○ No
Married filing separately, only. If the state in the address above is a community property state (AZ, CA, ID, LA, NV, NM, TX, WA, or WI), or a return is being filed to one of these states, answer the following questions.
Military. Is this your home of record? ○ Yes ○ No
If "Yes", fill in the Community Property Allocation Worksheet.
Others. Are you a resident of this community property state? ○ Yes ○ No
If "Yes", fill in the Community Property Allocation Worksheet and use Form 1040.
If "No", you CANNOT e-file this return.
4 ○ Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter the child's name ______ and social security number ______ A self-supporting child who lives with you IS NOT a qualifying person.
5 ○ Qualifying widow(er) with dependent child Year spouse died (2009 or 2010 only): ______

6 Exemptions a ☑ Yourself b ☐ Spouse Number of boxes checked

## Use Intake Sheet Part II and your Reference Documents to determine correct answer!

Note: Filing status can be tricky – do not hesitate to use resource materials
Note: Correct filing status is given in Notes for Familiarization problems
Note: Some filing status choices will require addition information
Note: If filing status is married filing separately, go handle box 39b on federal 1040 Pg2 now
Note: If filing status is head of household and TP has dependent, ignore red boxes here for now – filling in dependent information will resolve redness

# TWO-81 Main Info and Prep Use Job Aid

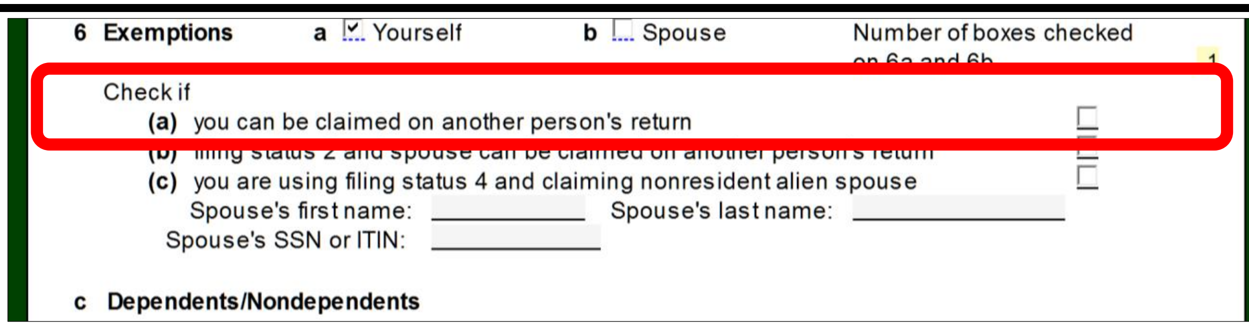

5 Qualifying widow(er) with dependent child Year spouse died (2008 or 2009 only):

6 Exemptions a ☑ Yourself b ☐ Spouse Number of boxes checked on 6a and 6b. 1

Check if

(a) you can be claimed on another person's return ☐

**Filled in Automatically**


6 Exemptions a ☑ Yourself b ☐ Spouse Number of boxes checked on 6a and 6b 1

Check if

(a) you can be claimed on another person's return ☐

(b) filing status 2 and spouse can be claimed on another person's return ☐

(c) you are using filing status 4 and claiming nonresident alien spouse ☐

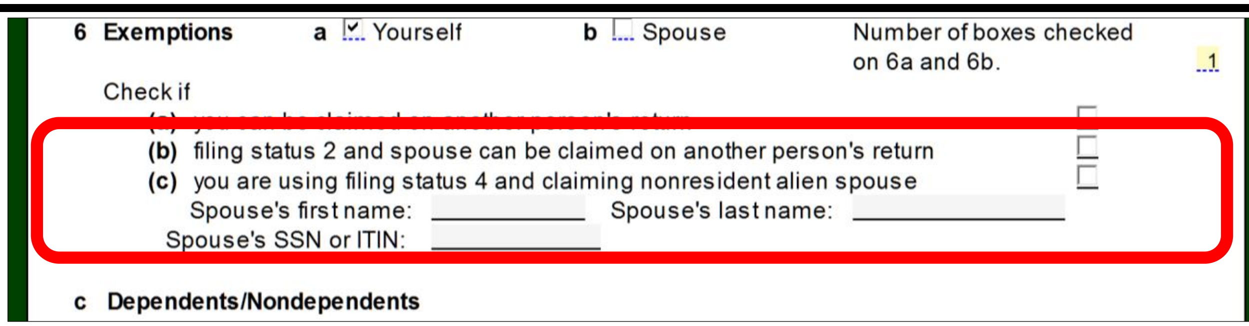
Spouse's first name: ________ Spouse's last name: ________

Spouse's SSN or ITIN: ________

c Dependents/Nondependents

**From Intake Sheet Part I, line 13**

Note: The question is not whether TP was actually claimed on another return, but whether TP could be claimed on another return.


6 Exemptions a ☑ Yourself b ☐ Spouse Number of boxes checked on 6a and 6b. 1

Check if

(a) you can be claimed on another person's return ☐

(b) filing status 2 and spouse can be claimed on another person's return ☐

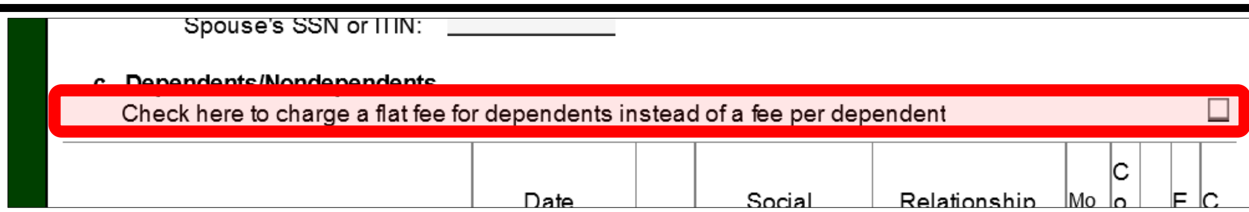
(c) you are using filing status 4 and claiming nonresident alien spouse ☐

Spouse's first name: ________ Spouse's last name: ________

Spouse's SSN or ITIN: ________

c Dependents/Nondependents

**If applicable, you will need to ask these questions directly**

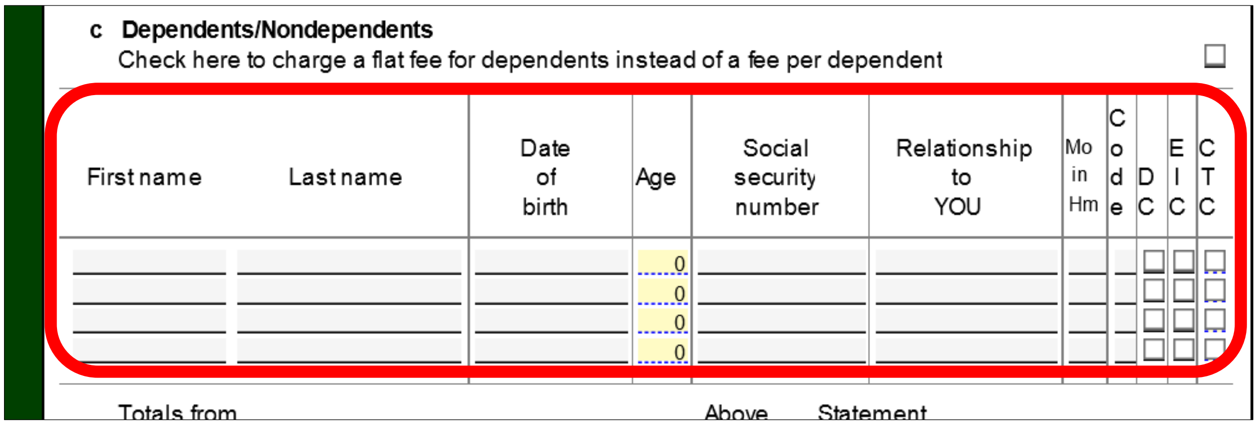

Spouse's SSN or ITIN: ________

c Dependents/Nondependents

Check here to charge a flat fee for dependents instead of a fee per dependent ☐

Date | Social | Relationship | Mo | C o | F | C

**Ignore this question – not applicable**



c Dependents/Nondependents

Check here to charge a flat fee for dependents instead of a fee per dependent ☐

| First name | Last name | Date of birth | Age | Social security number | Relationship to YOU | Mo in Hm | Code | DC | EIC | CTC |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | 0 | | | | | ☐ | ☐ | ☐ |
| | | | 0 | | | | | ☐ | ☐ | ☐ |
| | | | 0 | | | | | ☐ | ☐ | ☐ |
| | | | 0 | | | | | ☐ | ☐ | ☐ |

Totals from Above Statement

## From Intake Sheet Part II, line 2

Note: **Last name** not required if same as primary TP (Check whole name on SS card very carefully!)

Note: Same entry rules as above for **Date of birth** (**Age** is calculated automatically)

Note: **Social security number** – do not enter dashes

Note: **Relationship to YOU**, **Mo in Hm**, **Code** – Select from list

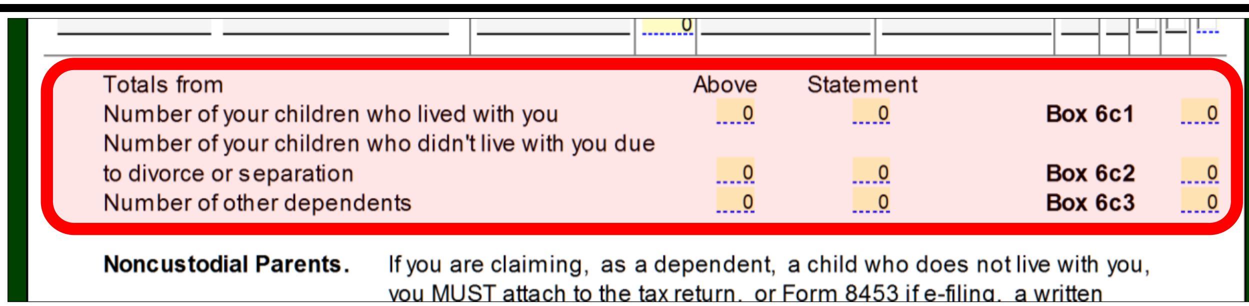
Note: Check **DC** box if Dependent Care credit for this child (See Part IV, line 9 of Intake Sheet)

Note: Check **EIC** box if child may qualify TP for Earned Income Credit

Note: **CTC** checked automatically if child qualifies for Child Tax Credit

Best Practice: Enter in order from youngest to oldest

Note: Use special TWO worksheet if more than four entries (be sure EIC eligible dependents are listed first)



| Totals from | Above | Statement | | |
|---|---|---|---|---|
| Number of your children who lived with you | 0 | 0 | **Box 6c1** | 0 |
| Number of your children who didn't live with you due to divorce or separation | 0 | 0 | **Box 6c2** | 0 |
| Number of other dependents | 0 | 0 | **Box 6c3** | 0 |

**Noncustodial Parents.** If you are claiming, as a dependent, a child who does not live with you, you MUST attach to the tax return, or Form 8453 if e-filing, a written

## Calculated automatically

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Number of other dependents 0 0 Box 6c3 0

**Noncustodial Parents.** If you are claiming, as a dependent, a child who does not live with you, you MUST attach to the tax return, or Form 8453 if e-filing, a written document that substantiates your right to claim this dependent. Check the item you are attaching.

A copy of a pre-1985 divorce or separation agreement ☐ or

A copy of a divorce or separation agreement that went into effect after 1984 and before 2009 ☐ or

Form 8332 - Release of Claim of Exemption - required if divorce or separation agreement went into effect after 2008 ☐

Total number of exemptions claimed **Box 6d** 1

## This is tricky – ask for help

agreement went into effect after 2008 ☐

Total number of exemptions claimed **Box 6d** 1

**State Information** If you are not preparing a state return, check here ☐ or fill in state information below

## Calculated automatically

Total number of exemptions claimed **Box 6d** 1

**State Information** If you are not preparing a state return, check here ☐ or fill in state information below

Full year resident: NJ and ___ Part-year: ___ and ___ Nonresident: ___ ___ ___ ___ ___

**Type of Return** ○ Bank products ◉ E-file ONLY ○ Paper

## Default: NJ Full-year resident with only NJ income

Note: NJ should be filled in automatically (from your Template)

Note: To only prepare a federal return, check the box on the first line and remove NJ from the field on the second line

Note: Multi-state, Part-year resident, and non-resident are Out of Scope unless you have been trained in these situations

Full year resident: NJ and ___ Part-year: ___ and ___ Nonresident: ___ ___ ___ ___ ___

**Type of Return** ○ Bank products ◉ E-file ONLY ○ Paper

**Select Your Bank** ○ Republic ○ Santa Barbara ○ Refund Advantage

## Ask for help before changing this

Note: **E-file ONLY** should be filled in automatically (from your Template)

Note: Check with Site Coordinator / ERO before selecting **Paper** (**Bank products** is OOS)

# TWO-81 Main Info and Prep Use Job Aid

**Type of Return** ◯ Bank products ◉ E-file ONLY ◯ Paper

**Select Your Bank** ◯ Republic ◯ SBTPG ◯ Refund Advantage ◯ River City ◯ 3Fund ◯ Advent Financial ◯ Other

**MoneyWise Prepaid MasterCard**
MoneyWise is available for e-filed returns requesting a refund, and can be used in conjunction with bank products and Fee Collect. Do not enter bank account information below. MoneyWise is not available for taxpayers with a Connecticut, New Hampshire, or Vermont address.

Would the taxpayer like to receive their refund on the MoneyWise card? ◯ Yes ◯ No

Fee Collect and Audit Shield are only available to tax preparers registered to offer them.

**Fee Collect**
Does the taxpayer want to have your tax preparation fees deducted from his or her refund? ◯ Yes ◯ No

**Audit Shield**
Does the taxpayer want Audit Shield? ◯ Yes ◯ No

**Bank Account Information**

**Ignore – Out of Scope**

**Audit Shield**
Does the taxpayer want Audit Shield? ◯ Yes ◯ No

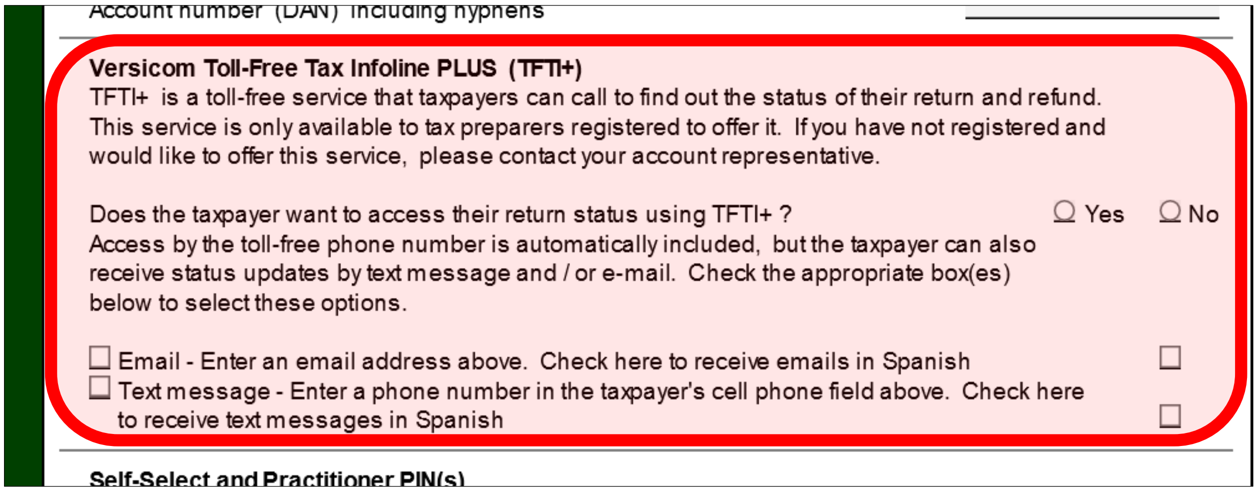
**Bank Account Information**
Direct deposit is available for e-filed returns, paper returns, and bank product returns.
ACH debit is available for e-filed returns only.

Routing transit number (RTN) of financial institution ____________
Account number (DAN) including hyphens ____________

**Versicom Toll-Free Tax Infoline PLUS (TFTI+)**

**Only needed if TP wants Direct Deposit or ACH Debit**
Note: See Intake Sheet Page 3 "**If you are due a refund or have a balance due:**"
Note: Usually best to wait until return is finished and Refund / Amount owed is known

# TWO-81 Main Info and Prep Use Job Aid



Account number (DAN) including hyphens

**Versicom Toll-Free Tax Infoline PLUS (TFTI+)**

TFTI+ is a toll-free service that taxpayers can call to find out the status of their return and refund. This service is only available to tax preparers registered to offer it. If you have not registered and would like to offer this service, please contact your account representative.

Does the taxpayer want to access their return status using TFTI+ ? ○ Yes ○ No

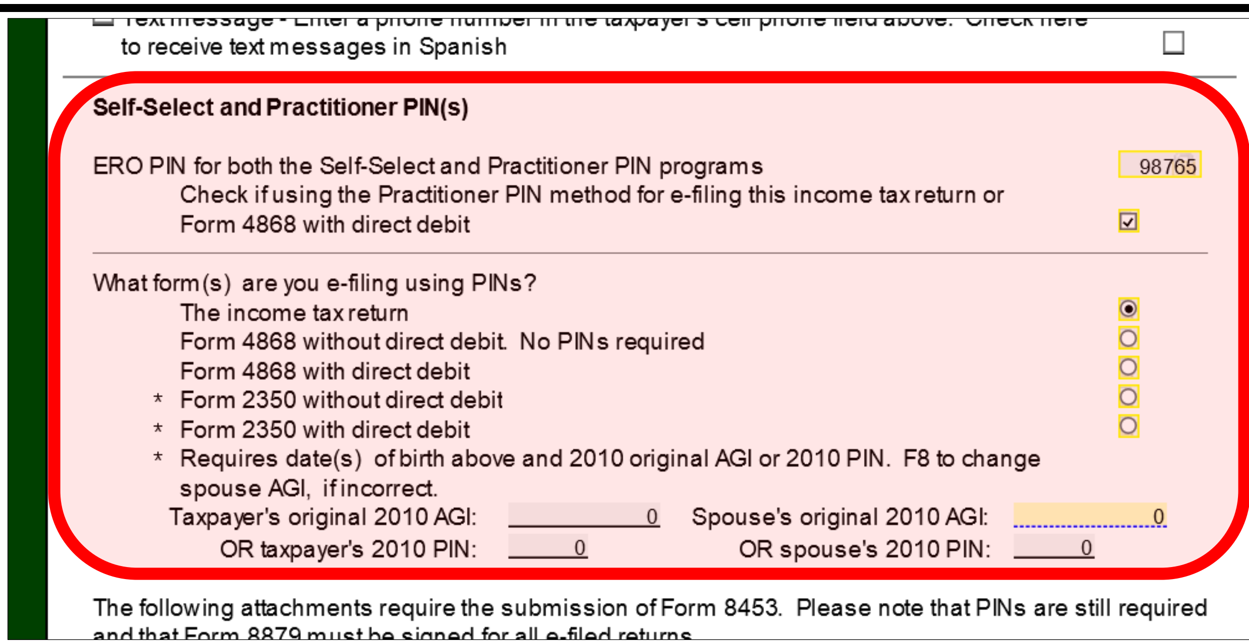
Access by the toll-free phone number is automatically included, but the taxpayer can also receive status updates by text message and / or e-mail. Check the appropriate box(es) below to select these options.

☐ Email - Enter an email address above. Check here to receive emails in Spanish ☐

☐ Text message - Enter a phone number in the taxpayer's cell phone field above. Check here to receive text messages in Spanish ☐

Self-Select and Practitioner PIN(s)

**Ignore – Out of Scope**



Text message - Enter a phone number in the taxpayer's cell phone field above. Check here to receive text messages in Spanish ☐

**Self-Select and Practitioner PIN(s)**

ERO PIN for both the Self-Select and Practitioner PIN programs 98765

Check if using the Practitioner PIN method for e-filing this income tax return or Form 4868 with direct debit ☑

What form(s) are you e-filing using PINs?

- The income tax return ◉
- Form 4868 without direct debit. No PINs required ○
- Form 4868 with direct debit ○
- * Form 2350 without direct debit ○
- * Form 2350 with direct debit ○
- * Requires date(s) of birth above and 2010 original AGI or 2010 PIN. F8 to change spouse AGI, if incorrect.

Taxpayer's original 2010 AGI: 0 Spouse's original 2010 AGI: 0

OR taxpayer's 2010 PIN: 0 OR spouse's 2010 PIN: 0

The following attachments require the submission of Form 8453. Please note that PINs are still required and that Form 8879 must be signed for all e-filed returns.

**This should be filled in (from Template) – Do NOT change!**

# TWO-81 Main Info and Prep Use Job Aid

OR taxpayer's 2010 PIN: 0    OR spouse's 2010 PIN: 0

The following attachments require the submission of Form 8453. Please note that PINs are still required and that Form 8879 must be signed for all e-filed returns.

- ☐ Form(s) 1098C or contemporaneous written statement
- ☐ Form 3468 attachment required
- ☐ Form 5713
- ☐ Form(s) 8332
- ☐ Form 8864 attachment required
- ☐ Schedule D transaction listing or Form 8949 used in a legacy return
- ☐ Revenue Procedure 2009-20 (Ponzi loss)
- ☐ Form 3115
- ☐ Form 4136 attachment required
- ☐ Forms(s) 8283, page 2 and / or appraisal
- ☐ Form 8858
- ☐ Form 8885 attachments
- ☐ Copy of divorce or separation agreement

The information below, as well as the ERO PIN above, must be filled in for all e-filed returns.

**This stuff is Out of Scope**

☐ Revenue Procedure 2009-20 (Ponzi loss)    ☐ Copy of divorce or separation agreement

The information below, as well as the ERO PIN above, must be filled in for all e-filed returns.

The date must be entered below. This is today's date: 10/03/2012

Do NOT use @Today.

Taxpayer's PIN 0 Enter 5 numbers, other than all zeroes. Date:

I ◉ authorize ○ do not authorize

ERO firm name to enter this PIN as my signature on my tax year 2011 electronically filed income tax return.

Spouse's PIN 0 Enter 5 numbers, other than all zeroes. Date:

I ◉ authorize ○ do not authorize

ERO firm name to enter this PIN as my signature on my tax year 2011 electronically filed income tax return.

Identity Protection PIN

**Fill in any 5 digits for TP (and SP) PIN and fill in today's date**

Note: We use the Practitioner PIN method (should be setup as part of Template)

Note: Will also need 5 digit PIN for Spouse (but date is automatic)

Note: Neither you nor TP will ever need to remember PINs – make up anything

signature on my tax year 2011 electronically filed income tax return.

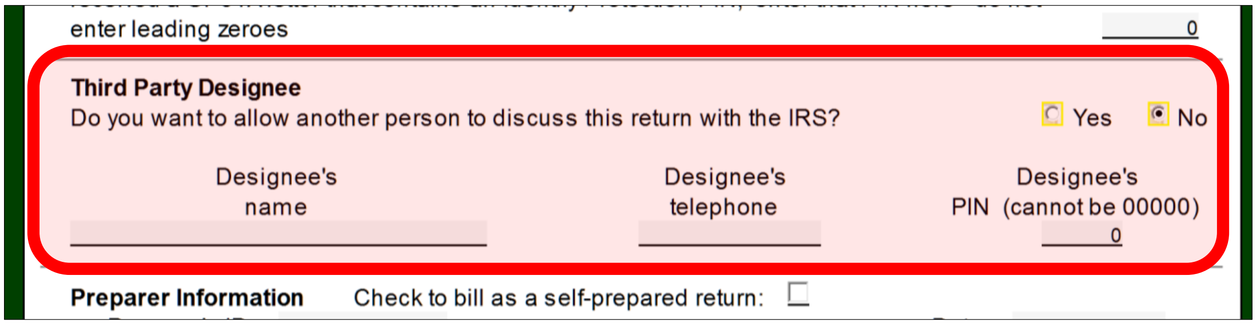
**Identity Protection PIN**

If the taxpayer is an identity theft victim who has been validated by the IRS and has received a CP01A letter that contains an Identify Protection PIN, enter that PIN here - do not enter leading zeroes 0

Third Party Designee

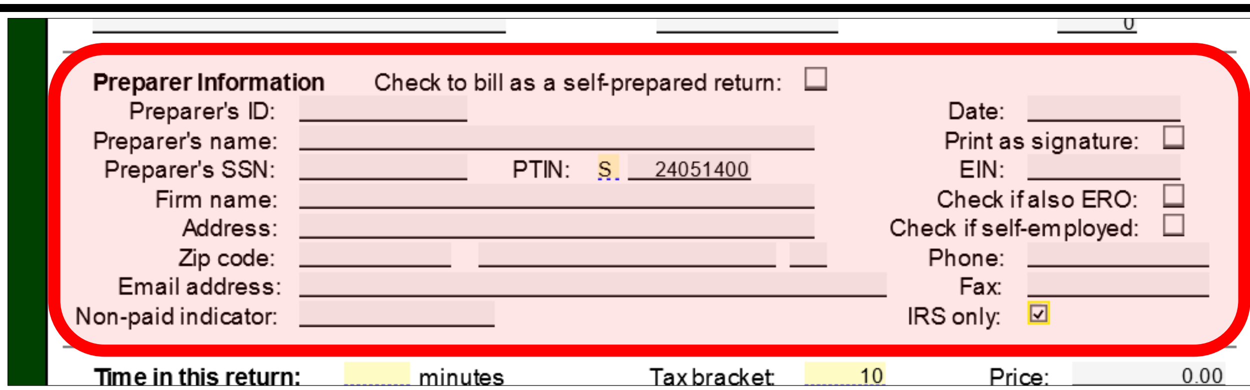
**Very rare – ask for help**

# TWO-81 Main Info and Prep Use Job Aid



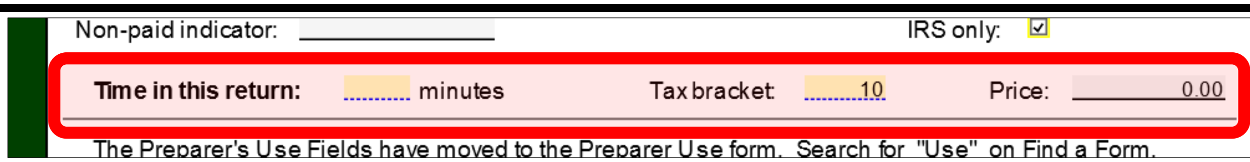

**Out of Scope**

Note: **No** should be checked (from Template)

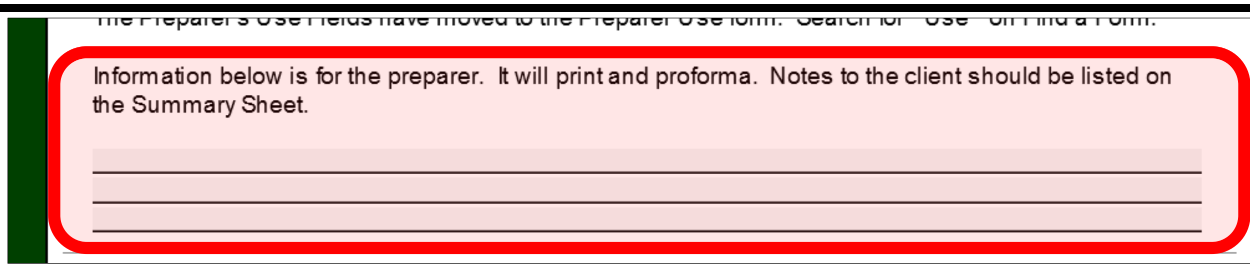



**Do NOT enter anything in this area**

Note: All appropriate information should be setup (from Template)



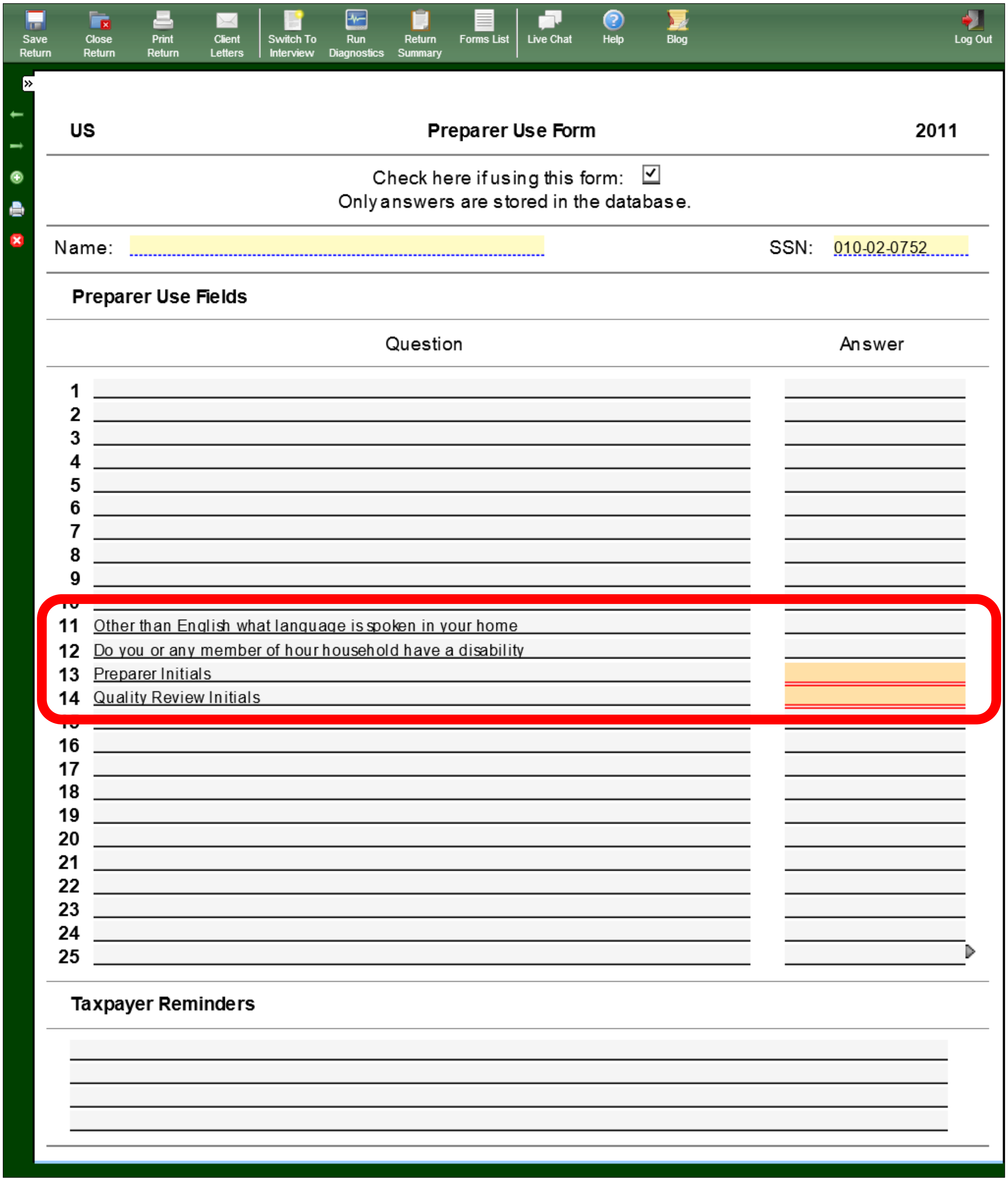

**Ignore this area**




**Use based on Site instructions**

# TWO-81 Main Info and Prep Use Job Aid

## Prep Use



Save Return | Close Return | Print Return | Client Letters | Switch To Interview | Run Diagnostics | Return Summary | Forms List | Live Chat | Help | Blog | Log Out

**US** **Preparer Use Form** **2011**

Check here if using this form: ☑
Only answers are stored in the database.

Name: SSN: 010-02-0752

**Preparer Use Fields**

| | Question | Answer |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | | |
| 10 | | |
| 11 | Other than English what language is spoken in your home | |
| 12 | Do you or any member of hour household have a disability | |
| 13 | Preparer Initials | |
| 14 | Quality Review Initials | |
| 15 | | |
| 16 | | |
| 17 | | |
| 18 | | |
| 19 | | |
| 20 | | |
| 21 | | |
| 22 | | |
| 23 | | |
| 24 | | |
| 25 | | |

**Taxpayer Reminders**

**Fill in as appropriate (rules vary from site to site)**

Note: Standard Training Template uses:

**11** & **12** place to enter answer to Intake Sheet Page 3 (top) questions;
**13** Preparer initials (filled in by preparer);
**14** Quality Reviewer initials (filled in by QR person when review is complete)