

FAM-00 Familiarization Checklist

Stage	Step	Notes / Comments
Introduction		
	FAM-10 Introduction to Familiarization	
	FAM-12 Using the Familiarization Checklist	
General Information		
	FAM-20 Federal 1040 Overview	
	FAM-22 NJ-1040 Overview	
	FAM-30 Intake Sheet	
	FAM-32 TaxPayer Documents	
	FAM-40 Familiarization Resources	
TaxWise Online		
	TWO-10 Intro to TWO	
	TWO-20 First Time Login Procedure	
	TWO-22 Adjusting Color Scheme Procedure	
	TWO-30 Intro to the Return Screen	
	FAM-50 Preparing a Familiarization Return	
Familiarization Problems		
	FAM-01 Andersen	
	FAM-02 Conway	
	FAM-03 Gallo	
	FAM-04 Patterson	
	FAM-05 McCook	
	FAM-06 Barufkin	
	FAM-07 Jackson	
	FAM-08 Rosemont	

Optional Extras		
Stage	Step	Notes / Comments
General		
	TWO-91 Password Reset Procedure	