

TY2010 Fam02 – Conway
 Filing Status: Married Filing Jointly
 10-07-2011 v2a-1

Process	Step	TP Form/ Note(s)	TW Form	Payee/Name	AGI	Refund	NJ 37	NJ 55/65	Notes
Main Info	1	Intake etc. Note 1 Note 7	Main Info						
Documents	2	W-2	W-2	Vampire Engineering	32,867	3,882			Hint: Address is different – Click “Check and make changes” in the address area and enter address from actual W-2 Hint: Don’t worry about fixing values in boxes 3, 4, 5, 6 until after box 12 entries made Hint: You must check the box by “Check to take calculations off of line 16” in order to edit box 16
	3	W-2	W-2	Smart Kids Charter Schools	53,043	4,339			Hint: Hover on W-2 in tree and click on “+” to add a second W-2 worksheet
	4	1099-G	1099-G Wkt	NJ Department of Labor	62,903	3,840			
Remove Red (Fed only)	5	Note 2	1040 Pg1						
Run Diagnostics	6		Diagnostics		62,903	3,840			Errors: None
NJ 1040	7	Note 8	NJ 1040 Pg1		62,903	3,840	52,043	569	
	8	Note 7 Note 5	NJ 1040 Pg3		62,903	3,840	52,043	464	Hint: You must enter amount paid in box to left on line 44 (amount of tax is then calculated)
	9	Note 3	NJ 1040 Pg4		62,903	3,840	48,263	544	
Remove Red	10	Note 6	Main Info 1040 Pg2 NJ DD Wkt						Hint: Enter RTN# and Acct# on both Main Info and 1040 Pg2 for federal refund Hint: Check first box on NJ DD Wkt under Direct Deposit to use same as federal
Run Diagnostics	11		Diagnostics		62,903	3,840	48,263	544	Errors: None
Quality Review	12								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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