TY2010 Fam07 – Jackson
Filing Status: Head of Household
09-18-2011 v4-1

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 5	Main Info						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	5,125			
	3	1099-G	1099G Wkt	NJ Dept of Labor	19,196	4,979			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	5,150			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	5,150			
	6	Intake Note 6	Sch EIC Wkt		18,518	5,150			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	5,150			Errors: None
NJ 1040	8	Note 8	NJ 1040 Pg1		18,518	5,150	10,321	694	
	9	Note 5 Note 9	NJ 1040 Pg3		18,518	5,150	10,321	694	Hint: Use ctrl-Space to remove red from box on line 44
Remove Red	10	Note 7 Check	Main Info 1040 Pg2 NJ DD Wkt		18,518	5,150	10,321	694	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	5,150	10,321	694	Errors: None

Quality Review	12				18,518	5,150	10,321	694	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)