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(Excel 3.0 can double click on the first word of a section title to go there.)

How to order the rest of TaxPack

This version of TaxPack is uploaded to various BBS around the United States. As you can see it contains only form 1040 and a few support forms. This is a fully operational version of TaxPack. A full list of all TaxPack forms is on The Menu. If you like what you see here and want to order the rest of TaxPack, you may use the Order Form. If you belong to a Mac User's Group you may distribute this limited version of TaxPack to the other members for them to try.

You may not resell TaxPack in any form including Public Domain software collections.

Introduction

This set of Excel documents (worksheets) simplify the entry of data and the calculations involved in doing your taxes. The documents are in a form accepted by the IRS so you can print and submit them instead of the forms the IRS sent you. These documents require that you use Excel version 2.2 or later.

All of the forms for one return must be kept in a single folder. If you have several returns to prepare keep the forms for each return in a separate folder. You can delete any forms from the folder that you do not need.

Take a moment when you finish printing out your final return to look over all of the forms to see if everything looks reasonable. Some errors are surprisingly easy to spot.

Calculation

When you start TaxPack, automatic calculation is turned off. This saves time during the entry of data on the forms. To calculate press COMMAND + = or choose Options Calculate Now. If you want automatic calculation, you can turn it on by choosing Options Calculation....

How to Use Multiple Copies of Forms

Some of the forms can be duplicated if you need more than one. For example, if you have two children with income you may need two Form 8814's. Forms that may be duplicated are the ones whose names end with "_master". You are limited to 5 of most of these forms. There are blank lines on The Menu after each "master" form where you must enter the names for each duplicated form.

To create a form, duplicate the form or forms (in finder) and give each copy a unique name (like "8814_Chris" or "8814_Sally"). Each form must have a unique name or you (and TaxPack) will not be able to distinguish between them. You must enter these new names on The Menu and select ("X") each one so that they will be loaded as part of your set of forms.

Schedule E

You will see a Schedule_E_Page_1_Master and Schedule_E_Page_2 in the folder. You can have up to five page_1's and one page_2. You do not need to file page 2 if you do not need it. The total of all page 1's and page 2 is shown ONLY on Form 1040.

Schedule SE

You and your spouse may use any combination of schedule SE long or schedule SE short.

Selecting and Opening Forms

TaxPack does not replace the instructions that are included with IRS forms. You should decide which forms you will need to use before you start using TaxPack then you should obtain copies of all Forms and Schedules that you are going to use from the IRS so you can refer to the instructions as you enter data to TaxPack. instructions are available to you.

From the Finder, double click "The Menu" document or open "The Menu" from Excel's File Open....

When The Menu is opened, it will define a new menu bar. This is the TaxPack Menu Bar. To return to the regular Excel Menu Bar, choose Options Excel Menu. To return to the TaxPack Menu Bar, choose Options TaxPack Menu. It is best if you do your work with the TaxPack Menu. You will not be able to use many of TaxPacks features if you use the Excel Menu. Unless stated otherwise, all menu items mentioned in this document refer to TaxPack menu items.

To choose which forms and schedules you wish to open, place an X in the box to the left of the form or schedule. (You can change the name of any form, just be sure to change its name on The Menu.) If you are using copies of any of the multiple forms make sure that you remember to enter the form's name to the right of its box. (See the section "How to use Multiple Copies of Forms"). When you marked all of your selections, press COMMAND + O or choose File Open Selected to open them. Do not be too concerned about opening all of the forms you need the first time. You can open other forms later as you need them.

When you wish to open additional forms, go to The Menu and enter an "X" in the box for the additional form and press COMMAND + O or choose File Open Selected. If you decide that you do not need a form that you opened, you should close all forms from File Close All, reopen The Menu, remove the "X" in the box next to the form you do not need and reopen everything by pressing COMMAND + O or choosing File Open Selected again.

Opening your forms can take a quite a while, particularly on a Classic or SE. While the forms are being opened, the status bar at the bottom of your display will show progress messages. You may not see any forms until all forms have been opened.

If you wish to open a form or schedule in order to look at it, you may choose Options Excel Menu then choose File Open. DO NOT TRY TO USE A FORM THAT HAS BEEN OPENED IN THIS WAY. THIS WILL NOT WORK AND YOU WILL HAVE ERRORS.

Saving and Closing Forms

It is a good idea to choose File Save All occasionally as you enter your tax data. If you experience a system problem or a power failure, all of the data entered since the last Save All will be lost.

Do not close a document by choosing Excel's File Close if it has been opened from The Menu. Close documents by choosing File Close All.

You can quit TaxPack by choosing File Quit. Excel will ask if you want to save the changes to each form or schedule that has changed. Unless you have made an error and do not wish to save the changes you should answer "yes" or press the enter key in response to each Save? dialog box.

Arranging Forms (Windows)

You can "tile" the windows on the screen at any time by pressing COMMAND + A or you can choose Forms Arrange All.

Setting Forms for a Printer

ImageWriter Printer Set Up

All forms are initially sized to print on an ImageWriter II using 9 point Geneva. If you have set the forms for some other printer and wish to set them for the ImageWriter, choose File Setup For ImageWriter.
This setup uses a wide page setting.

LaserWriter Printer Set Up

You can set the forms for the LaserWriter and StyleWriter (Helvetica 9) by choosing File Setup For LaserWriter. In general, all Apple printers other than the ImageWriter should use this setup. You should choose font substitution and smoothing in the File Page Setup... Dialog box.
This setup uses a narrow page setting.

Other Printer Set Up

This command allows you to use any available font when you print your forms. Be aware that different fonts will alter the height of each form. If you use this command, then you should preview your forms to ensure that they will print correctly. Choose the File Setup For Other Printer...
You will see the font dialog box from which you can choose a
font and size to use. You must choose a Sans Serif font. (This is an IRS requirement). All forms will be set to the same width that is used for the LaserWriter (narrow).

Column A of each form has been left empty on each document to allow you to adjust horizontal centering. If you are working with Excel 3.0 or above, you can adjust margins and column width in File Print Preview.

Printing Your Forms

To print only the current form choose Print Form. To print all of the forms that are open press COMMAND + P or choose File Print All. The Menu will not be printed.

You may wish to preview your forms before printing. You can preview a form by choosing the File Print Preview command.

General Information

Moving Between Forms

To activate a form, you can choose its name from the Forms menu or you can click anywhere in the desired form's window if it is visable. (To expand a window to full screen, either click in the zoom box on the right of the title bar or double click anywhere in the title bar.)

Moving Around on a Form

To move to the next cell in which you can make an entry press the TAB key. To move in the reverse direction, press Shift+TAB. You can click on a cell to move there but you may not be allowed to make an entry if the cell is protected.

Italic Font

Throughout all of the documents, values shown in italics indicate that the cell is a calculated value and you should not make an entry in that cell. These cells are locked. Cell values that are in plain font and cells that are empty are cells into which you may enter values.

Notes

Text in square brackets [ ] are notes to you from me. Occasionally these might appear as the result of some calculation.

Document and Cell Protection

All forms are protected without a password to prevent accidental erasure of formulas and text. (This is also what allows Tabbing between entry cells.)

There may be times when you need to change a formula in a cell. You must unprotect the form in order to do this. To unprotect a form choose Options Unprotect Form. When you have finished your change, you should reprotect the form by choosing Options Protect Form.

Including Values From Foreign Documents or Form 4562

Open the document "Manual Linking Instructions" to learn how to link values.

Notes About Specific Forms

W-2 and 1099 Summaries

You must enter information from 1099's and W-2's you receive on these summaries rather than on your Schedule B, D, 1040 etc. The totals will automatically be posted to the correct place on your forms. If you need more lines on these data entry forms, unprotect the form, select a row somewhere in the middle of the existing form and insert a new line (Command + I or choose Edit Insert...) the sum will then include your new lines. (Do not forget to reprotect the form). In the case of 1099INT and 1099DIV only the total will appear on your Schedule B or 1040.   On each of the 1099 summaries, some column totals may refer to a note that states that the totals must be entered manually to other forms where required. This means that the totals are not used in any of the calculations on any TaxPack form. These summaries MUST be sent to the IRS along with your return to support the totals that will be shown on Forms and Schedules.

If you have made excess social security tax contributions, a note will appear at the bottom of the W-2 summary. This is a warning. You must calculate and enter the excess on Form 1040 (see the instructions).

Form 1040

Enter your Name and Social Security number on form 1040. They will automatically appear on most of your other forms where they are needed. There are several exceptions. The Name box on these forms will be empty.

Schedule SE (long & short)

There are several places on schedule SE where W-2 railroad retirement or church employment or other income etc. must be entered for the person with the income.   You will need to enter this manually.

Common Problems
Forms and Schedules are not being calculated after data entry.

TaxPack disables automatic calculations. To calculate press Command + =. Refer to the section "Calculation".

Some Forms or Schedules do not print on a single page.

You should use the narrow page type printer. Choose LaserWrite Printer Setup from the menu.

Excel Message: "Locked cell cannot be changed"

All worksheets are protected. This message indicates that you are trying to enter data into a cell that normally would not require data entry. If you need to change the contents of a cell, see "Document and

Cell Protection".

TaxPack Support

If you have problems using the forms and have read these instructions then write or call me. Please do not call with tax related problems.

Richard Williams
2426 Huffman Drive West
Mobile AL 36693
205 660 9363
7PM-9PM CST weekdays and 10AM-9PM CST weekends.

Try to call while you are having the problem and can repeat it.