

	A	B	C	D	E
1	This worksheet contains all data from worksheets that is needed by other worksheets. No data is transmitted directly from one sheet to another. It all goes through here. Except for constants on _Data.				
2					
3	The formula column below is dynamically loaded with formulas from the lookup table to the right. The 'generic' formula is there with a "*" where the name of the user's document is substituted before it is moved to the formula column. Loading begins by clearing all formulas from the formula column. Then a search criteria is defined in the area to the right to find all 'link' & 1 occurrences. The template text is then moved to the formula column for each matching row. This sets the number of legal copies for each type form that is to be loaded.				
4					
5	Loading then continues with the user's named documents. Each document has a documentInternalName that is used as the criteria search text. Then a search is made for those data rows and the substitution and move takes place. The X_Count cell keeps a count each document that has been loaded (+1) and is used as the copyCount of the search criteria.				
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17	<ul style="list-style-type: none"> Name: Contains the name of the cell in the next column to the right. (if there is a name defined.) 				
18					
19	<ul style="list-style-type: none"> Formula: This contains the formula that 'gets' a total, etc. from the worksheet. This formula is constructed by the load macro. 				
20					
21	<ul style="list-style-type: none"> Description: of the cell to the left. 				
22					
23	<ul style="list-style-type: none"> Consumer: What 				
24					
25					
26					
27					
28					
29					
30	This row is the first line of the data base. Insert new blocks after this row.				
31					
32	Schedule A				
33	A_Count		1		
34	A_limitation		high income limitation	6251	
35	A_medical		medical & dental deductions	6251	
36	A_taxes		taxes	6251	
37	A_misc		misc deductions	6251	
38	A_Deductions		Itemized deductions	1040	
39	Schedule B				
40	B_Count		1		
41	B_Open		Open?		
42	B_CapitalGainDist		Capital Gain Distributions		
43	B_Interest		Interest	1040	
44	B_Dividends		Dividends	1040	
45	Schedule Cs				
46	C_Count		1		
47			1 means C is open		
48			C-1 Your income		

	A	B	C	D	E
49				C-1 Spouse income	All values are totaled below
50				C-1 Shared income	
51				1 means C is open	
52				C-2 Your income	
53				C-2 Spouse income	
54				C-2 Shared income	
55				1 means C is open	
56				C-3 Your income	
57				C-3 Spouse income	
58				C-3 Shared income	
59				1 means C is open	
60				C-4 Your income	
61				C-4 Spouse income	
62				C-4 Shared income	
63				1 means C is open	
64				C-5 Your income	
65				C-5 Spouse income	
66				C-5 Shared income	
67		C_openCount		Count of C's opened	2441 worksheet
68		C_your		Your total C	IRA worksheets, below
69		C_spouse		Spouse total C	IRA worksheets, below
70		C_shared		Shared total C income	IRA worksheets, below
71	Schedule D				
72		D_Count	1		1040-13, 2441 worksheet below
73		D_Open		1 if D is open	
74		D_Tax		Tax calculated on sched D	
75		D_CG		Net capital gain	
76		D_CL		Net capital loss	
77	Schedule E Supplemental Income				
78		E_1_Count	1		E_inc E_inc E_inc E_inc E_inc 2441 worksheet
79				first page 1	
80				second	
81				third	
82				fourth	
83				fifth	
84		E_Open		1 if an E (page 1) is open	
85		E_2_Count	1		
86		E_2_ExcessInclusion		Excess Inclusion page 2	
87				Total from page 2	
88	Schedule F				
89		F_Count	1		
90				1 means F is open	
91				F-1 Your farm income	
92				F-1 Spouse farm income	
93				F-1 Shared farm income	
94				1 means F is open	
95				F-2 Your farm income	
96				F-2 Spouse farm income	

	A	B	C	D	E
97				F-2 Shared farm income	
98				1 means F is open	
99				F-3 Your farm income	
100				F-3 Spouse farm income	
101				F-3 Shared farm income	
102				1 means F is open	
103				F-4 Your farm income	
104				F-4 Spouse farm income	
105				F-4 Shared farm income	
106				1 means F is open	
107				F-5 Your farm income	
108				F-5 Spouse farm income	
109				F-5 Shared farm income	
110	fOpenSum			Count of F's opened	2441
111	fYourSum			Your total F income	
112	fSpouseSum			Spouse total F income	1040
113	fSharedSum			Shared total F income	
114	Schedule SE				
115	SE_Y_Count		1		
116	SE_YourIncome			Your income from SE	yourEarnedIncome
117	SE_Your			Your tax	1040-48
118	SE_S_Count		1		
119	SE_SpouseIncome			Spouse's income from SE	spouseEarnedIncome
120	SE_Spouse			Spouse's	1040-48
121	W2				
122	W2_Count		2.00		
123	W2_YATip		Err:508	Your allocated tips	W2_YEarn_Inc
124	W2_SATip		Err:508	Spouse allocated tips	W2_SEarn_Inc
125	W2_YEIC		Err:508	Your advanced EIC payment	W2_TEIC
126	W2_SEIC		Err:508	Spouse advanced EIC payment	W2_TEIC
127	W2_YWTax		Err:508	Your withheld tax	W2_YEarn_Inc
128	W2_SWTax		Err:508	Spouse withheld tax	W2_SEarn_Inc
129	W2_YWage		Err:508	Your wages, tips, etc.	W2_TWage
130	W2_SWage		Err:508	Spouse wages, tips, etc.	W2_TWage
131	W2_YDCB		Err:508	Your dep care benefits	W2_TDCB
132	W2_SDCB		Err:508	Your dep care benefits	W2_TDCB
133	W2_YSTax		Err:508	Your state tax	W2_TSTax
134	W2_SSTax		Err:508	Spouse state tax	W2_TSTax
135	W2_YLTax		Err:508	Your local tax	W2_TLTax
136	W2_SLTax		Err:508	Spouse local tax	W2_TLTax
137	1040 Form				
138	F1040_Count		2.00		
139	F1040_Tax_Inc		Err:508	Taxable income	Summary
140	F1040_Non_Wage_Inc		Err:508	Total non-wage income	
141	F1040_taxRefunds		Err:508	Any taxable tax refunds	6251
142	F1040_TotallIncome		Err:508	Total income	
143	F1040_keoghAdj		Err:508	Keogh/SEP adjustment	
144	F1040_SEtax		Err:508	1/2 calculated SE tax	2441 earned income

	A	B	C	D	E
145		F1040_Tot_Adj	Err:508	Total adjustments to income	
146		F1040_Gross	Err:508	Adjusted Gross	A
147		F1040_File_Stat	Err:508	Filing Status	link
148		F1040_Extra_Deduct	Err:508	Extra Deductions (blind, 65)	link
149		F1040_ClaimAsDependent	Err:508	Check box "X"ed	below
150		F1040_Separatetemize	Err:508	Check box "X"ed	below
151		F1040_Exemptions	Err:508	Number of exemptions	
152		F1040_tax	Err:508	Tax	2441 Wksht
153		F1040_grossLessDeductions	Err:508	Adjusted Gross less deducti	6251 Alt Min Tax
154		F1040_Exempt	Err:508	Amount of exemptions	
155		F1040_foreignTaxCredit	Err:508	Foreign tax credit	6251
156		F1040_Tax_Credits	Err:508	Tax Credits	
157		F1040_Other_Tax	Err:508	Other Taxes	Summary
158		F1040_Payments	Err:508	Tax Payments	
159		F1040_Names	Err:508	Taxpayer Names	All
160		F1040_SSN	Err:508	Social Security Number	All
161		F1040_Ex_Count	Err:508	Number of exemptions	
162		F1040_Spouse_Ex	Err:508	Spouse exemption box	tax sched macros
163		F1040_Other_Inc	Err:508	Other taxable income	
164		F1040_nondeductibleIRA_your	Err:508	Your nondeductible IRA contrib	
165		F1040_nondeductibleIRA_spou	Err:508	Spouse nondeductible IRA contrib	
166		F1040_ClaimDependentDeduc	Err:508	Claimed as dependent dedu	below
167		1099-DIV			
168		F1099DIV_Count	2.00		
169		F1099DIV_Gross	Err:508	1a-Gross dividends	
170		F1099DIV_ODiv	Err:508	1b-Ordinary dividends	1040-9
171		F1099DIV_CG	Err:508	1c-Capital gain distributions	D or 1040-14
172		F1099DIV_NDiv	Err:508	1d-Nontaxable dividends	D
173		F1099DIV_InvExp	Err:508	1e-Investment Expense	Dividends (below)
174		F1099DIV_TW	Err:508	2-Withheld tax	SUM_WTax (below)
175		1099-INT			
176		F1099INT_Count	2.00		
177		F1099INT_TotalInt	Err:508	Total interest	F1099INT_TInt
178		F1099INT_NTInt	Err:508	Nontaxable interest	1040-8b
179		F1099INT_EWP	Err:508	Early Withdrawal Penalty	1040-28
180		F1099INT_IUSB	Err:508	Int from U.S. Savings Bonds	F1099INT_TInt
181		F1099INT_TW	Err:508	Tax withheld	SUM_WTax
182		1099_R			
183		F1099R_Count	1		
184		F1099R_Gross		Gross distribution	1040-16a
185		F1099R_Taxable		Taxable part	1040-16b
186		F1099R_TW		Tax withheld	SUM_WTax
187		2106 Employee Business Expenses			
188		F2106_Y_Count	1		
189		F2106_Income1		Your Income(excess expenses	SUM_Earninc below
190		F2106_Expenses1		Non-reimbursed expenses	Sched A 20 or
191		F2106_Artist1		1 if qualified artist	1040 30 or
192		F2106_Disabled1		1 if disabled	Sched A 26

	A	B	C	D	E
193		F2106_S_Count	1		
194		F2106_Income2		Spouse Income(excess expe	SUM_Earninc below
195		F2106_Expenses2		Non-reimbursed expenses	Sched A 20 or
196		F2106_Artist2		1 if qualified artist	1040 30 or
197		F2106_Disabled2		1 if disabled	Sched A 26
198	2441 Form Child Care Expenses				
199		F2441_Count	1		
200		F2441_CCare		Child care expenses	1040-41
201		F2441_DCBene		Excess Dependent Care Ben	SUM_Earninc
202					and note at 1040-7
203	3903 Moving Expenses				
204		F3903_Count	1		
205				Your moving expense	below
206				Spouse moving expense	below
207	4562 Depreciation and Amortization				
208		F4562_Count	1		
209					
210	4797 Sales of Business Property				
211		F4797_Count	1		
212		F4797_capitalGain		capital gain	Schedule D
213		F4797_ordinaryGainLoss		ordinary gain or loss	
214		F4797_casualtyTheftLoss		casualty or theft loss	Schedule A
215	6251 Alternative Minimum Tax				
216		F6251_Count	1		
217		F6251_open		True if open	2441 Wksht
218		F6251_line18		Line 18	2441 Wksht
219		F6251_alternativeMinimumTax		Alternative minimum tax	1040
220	8814 Forms Children's Income				
221		F8814_Count	1		
222				8814-1 Income	Summed below as F8814_inc_total and F8814_tax_tota
223				8814-1 Tax	
224				8814-2 Income	
225				8814-2 Tax	
226				8814-3 Income	
227				8814-3 Tax	
228				8814-4 Income	
229				8814-4 Tax	
230				8814-5 Income	
231				8814-5 Tax	
232	8829 Expenses for Business Use of Your Home				
233		F8829_Count	1		
234					
235	This row is the last line of the data base. Insert new blocks before this row.				
236	This row is the last line of the data base. Insert new blocks before this row.				
237					
238					
239	Summary & Totals(Consolidates various cells from above)				Consumers
240					

	A	B	C	D	E
241		W2_TEIC	Err:508	Total adv. EIC payments W-2	1040-53
242		W2_TW	Err:508	Total tax withheld on W-2	SUM_WTax
243		W2_Your	Err:508	Your W2 earned income	
244		W2_Spouse	Err:508	Spouse's W2 earned income	SUM_Earninc
245		W2_TDCB	Err:508	Total dependent care benefi	2441
246		W2_TSTax	Err:508	Total state tax	A
247		W2_TLTax	Err:508	Total local tax	A
248			0	Total of all schd E page 1's	E_inc
249		yourEarnedIncome	Err:508	Your earned income from	2441
250				Wages from W-2, SE - half of	
251				1040 SE tax	
252		spouseEarnedIncome	Err:508	Spouse's earned income fro	2441
253				Wages from W-2, SE - half of	
254				1040 SE tax	
255		C_PL_Total	Err:508	Total of all schedule C's	1040-12
256		D_CGTotal	0	As required for line 13 1040	1040-13
257		E_Inc	0	Total of all page 1's and pag	1040-18
258		F_PL	Err:508	Total income/loss from F	
259		F3903_Total	0	Total of all 3903's Expense	Schedule A
260		F8814_Inc_Total	0	Total of all 8814's Income	1040-22
261		F8814_Tax_Total	0	Total of all 8814's Tax	1040-38
262		halfSpouseSEtax	Err:508	Half of spouse's SE tax	1040-25
263		halfYourSEtax	Err:508	Half of your SE tax	1040-25
264		SE_Total	Err:508	Total SE tax	1040-48
265			Err:508	Can be claimed as dependent	
266			Err:508	Spouse filed separately and	
267				itemized/Dual status alien	
268			Err:508	Deduction from tables	
269			Err:508	claimed as dependent ded.	
270			Err:508	Correct deduction	
271		ifStandardDeduction	Err:508	if standard deduction used	
272		deduction	Err:508	Max (Sched A or correct ded	1040-34,6251
273		F1040_Tax	Err:508	(from _Tax) Normal tax	
274			Err:508	(from Sched D) Tax Calc	
275		taxSource	Err:508	1=tax tables	1040
276				2=tax rate schedules	
277				3=schedule D	
278			Err:508	Min of D_tax or 1040 tax	1040
279			0	Tax from 8814's	
280		taxAmount	Err:508	Tax amount	
281		W2_2106_2441	Err:508	Total income from W2, 2441	1040-7
282				dep. care excess benes, 2106	
283				excess expense	
284		SUM_Tax_Exempt	Err:508	Tax exem inc from 1099INT	
285		F1099_TW	Err:508	Any tax withheld on 1099s?	1040-56 [X]
286		F1099INT_TInt	Err:508	1099-INT Total interest less	
287				tax exempt interest + Savings	
288				bond interest	

	A	B	C	D	E
289		SUM_TW	Err:508	Total tax withheld on W-2	1040-56
290				and 1099's	
291		Interest	Err:508	If Sch B open, Interest from	1040-8a
292				else Interst from 1099-INT	
293		Dividends	Err:508	If Sch B open, Div from B	1040-9
294				else Div + Inv Expense from	
295				1099-DIV	
296					

	F	G	H	I	J	K	L
1	ata						
2		link_Count	2	link_count is always initialized to 1			
3				by load macros at start of the load			
4							
5							
6	s						
7							
8							
9							
10							
11		CRITERIA		Criteria is changed by load macros			
12		searchText CopyNumber		as loading progresses			
13	of =F1040		1				
14	a.						
15							
16							
17							
18							
19	from the proper						
20	using the template to the right						
21							
22	uses this cell.						
23				• searchText: Contains the 'template' formula that is used to construct the formula			
24				in the formula column.			
25				• copyNumber: A serial number used to sequence loading to next form of a t			
26				• baseFormula: The formula that is to be moved to the formula c			
27				user's document name is substituted for the "*".			
28							
29							
30		searchText	copyNumber	baseFormula			
31							
32							
33		link	1				1
34		A	1	*limitation			
35		A	1	*medical			
36		A	1	*taxes			
37		A	1	*misc			
38		A	1	*total			
39							
40		link	1				1
41		B	1				1
42		B	1	*CapitalGainDist			
43		B	1	*Interest			
44		B	1	*Dividends			
45							
46		link	1				1
47		C	1				1
48		C	1	if(*you,*income,0)			

	F	G	H	I	J	K	L
49	d	C	1	if(*spouse,*income,0)			
50		C	1	if(*both,*income,0)			
51		C	2				1
52		C	2	if(*you,*income,0)			
53		C	2	if(*spouse,*income,0)			
54		C	2	if(*both,*income,0)			
55		C	3				1
56		C	3	if(*you,*income,0)			
57		C	3	if(*spouse,*income,0)			
58		C	3	if(*both,*income,0)			
59		C	4				1
60		C	4	if(*you,*income,0)			
61		C	4	if(*spouse,*income,0)			
62		C	4	if(*both,*income,0)			
63		C	5				1
64		C	5	if(*you,*income,0)			
65		C	5	if(*spouse,*income,0)			
66		C	5	if(*both,*income,0)			
67		C	1	cOpenSum			
68	pw	C	1	cYourSum			
69	pw	C	1	cSpouseSum			
70	pw	C	1	cSharedSum			
71							
72		link	1				1
73	nt	D	1				1
74		D	1	*tax			
75		D	1	*netGain			
76		D	1	*netLoss			
77							
78		link	1				1
79		E_1	1	*Sched_E_1_Total			
80		E_1	2	*Sched_E_1_Total			
81		E_1	3	*Sched_E_1_Total			
82		E_1	4	*Sched_E_1_Total			
83		E_1	5	*Sched_E_1_Total			
84		E_1	1				1
85		link	1				1
86		E_2		*sched_E_2_ExcessInclusion			
87		E_2	1	*Sched_E_2_Total			
88							
89		link	1				1
90		F	1				1
91		F	1	if(*you,*income,0)			
92		F	1	if(*spouse,*income,0)			
93		F	1	if(*both,*income,0)			
94		F	2				1
95		F	2	if(*you,*income,0)			
96		F	2	if(*spouse,*income,0)			

	F	G	H	I	J	K	L
97		F	2	if(*both,*income,0)			
98		F	3				1
99		F	3	if(*you,*income,0)			
100		F	3	if(*spouse,*income,0)			
101		F	3	if(*both,*income,0)			
102		F	4				1
103		F	4	if(*you,*income,0)			
104		F	4	if(*spouse,*income,0)			
105		F	4	if(*both,*income,0)			
106		F	5				1
107		F	5	if(*you,*income,0)			
108		F	5	if(*spouse,*income,0)			
109		F	5	if(*both,*income,0)			
110		F	1	fOpenSum			
111		F	1	fYourSum			
112		F	1	fSpouseSum			
113		F	1	fSharedSum			
114							
115		link	1				1
116		SE_Y	1	*income			
117		SE_Y	1	*tax			
118		link	1				1
119	e	SE_S	1	*income			
120		SE_S	1	*tax			
121							
122		link	1				1
123		W2	1	*Y_Allocated_Tips			
124		W2	1	*S_Allocated_Tips			
125		W2	1	*Y_Adv_EIC_Payments			
126		W2	1	*S_Adv_EIC_Payments			
127		W2	1	*Y_Withheld			
128		W2	1	*S_Withheld			
129		W2	1	*Y_Wages			
130		W2	1	*S_Wages			
131		W2	1	*Y_Dep_Care_Bene			
132		W2	1	*S_Dep_Care_Bene			
133		W2	1	*Y_State_Tax			
134		W2	1	*S_State_Tax			
135		W2	1	*Y_Local_Tax			
136		W2	1	*S_Local_Tax			
137							
138		link	1				1
139		F1040	1	*Taxable_Income			
140		F1040	1	*Non_wage_income			
141		F1040	1	*taxrefunds			
142		F1040	1	*Totalincome			
143		F1040	1	*keoghAdj			
144	p	F1040	1	*SEtax			

	F	G	H	I	J	K	L
145		F1040	1	*total_Adjustments			
146		F1040	1	*Adjusted_Gross			
147		F1040	1	*Filing_Status			
148		F1040	1	*extraDeductions			
149		F1040	1	*claimAsDependent			
150		F1040	1	*separateItemize			
151		F1040	1	*Exemptions			
152		F1040	1	*tax			
153		F1040	1	*grossLessDeductions			
154		F1040	1	*Exem_Amount			
155		F1040	1	*foreignTaxCredit			
156		F1040	1	*Tax_Credits			
157		F1040	1	*Other_Tax			
158		F1040	1	*Payments			
159		F1040	1	*Names			
160		F1040	1	*SSN			
161		F1040	1	*Exemptions			
162		F1040	1	*Spouse_exemption			
163		F1040	1	*Other_Income			
164		F1040	1	*nondeductibleIRA_your			
165		F1040	1	*nondeductibleIRA_spouse			
166		F1040	1	*claimDependentDeduction			
167							
168		link	1				1
169		F1099DIV	1	*Gross_Dividends			
170		F1099DIV	1	*Ordinary_Dividends			
171		F1099DIV	1	*Capital_Gain_Distributions			
172		F1099DIV	1	*Nontaxable_Dividends			
173		F1099DIV	1	*InvestExpense			
174		F1099DIV	1	*Tax_Withheld			
175							
176		link	1				1
177		F1099INT	1	*Taxable_Interest			
178		F1099INT	1	*Nontaxable_Interest			
179		F1099INT	1	*Early_Withdrawal_Penalty			
180		F1099INT	1	*US_Bond_Interest			
181		F1099INT	1	*Tax_Withheld			
182							
183		link	1				1
184		F1099R	1	*Gross_Dist			
185		F1099R	1	*Taxable_Part			
186		F1099R	1	*Tax_Withheld			
187							
188		link	1				1
189		F2106_Y	1	if(*income<0,-*income,0)			
190		F2106_Y	1	*Expenses			
191		F2106_Y	1	*Artist			
192		F2106_Y	1	*Disabled			

	F	G	H	I	J	K	L
193		link	1				1
194		F2106_S	1	if(*income<0,-*income,0)			
195		F2106_S	1	*Expenses			
196		F2106_S	1	*Artist			
197		F2106_S	1	*Disabled			
198							
199		link	1				1
200		F2441	1	*Childcare			
201		F2441	1	*Dep_Care_Benefits			
202							
203							
204		link	1				1
205		F3903	1	*expense			
206		F3903	2	*expense			
207							
208		link	1				1
209							
210							
211		link	1				1
212		F4797	1	*capitalGain			
213		F4797	1	*ordinaryGainLoss			
214		F4797	1	*casualtyTheftLoss			
215							
216		link	1				1
217		F6251	1				1
218		F6251	1	*line18			
219		F6251	1	*alternativeMinimumTax			
220							
221		link	1				1
222		F8814	1	*income			
223		F8814	1	*tax			
224		F8814	2	*income			
225		F8814	2	*tax			
226		F8814	3	*income			
227		F8814	3	*tax			
228		F8814	4	*income			
229		F8814	4	*tax			
230		F8814	5	*income			
231		F8814	5	*tax			
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233		link	1				1
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