

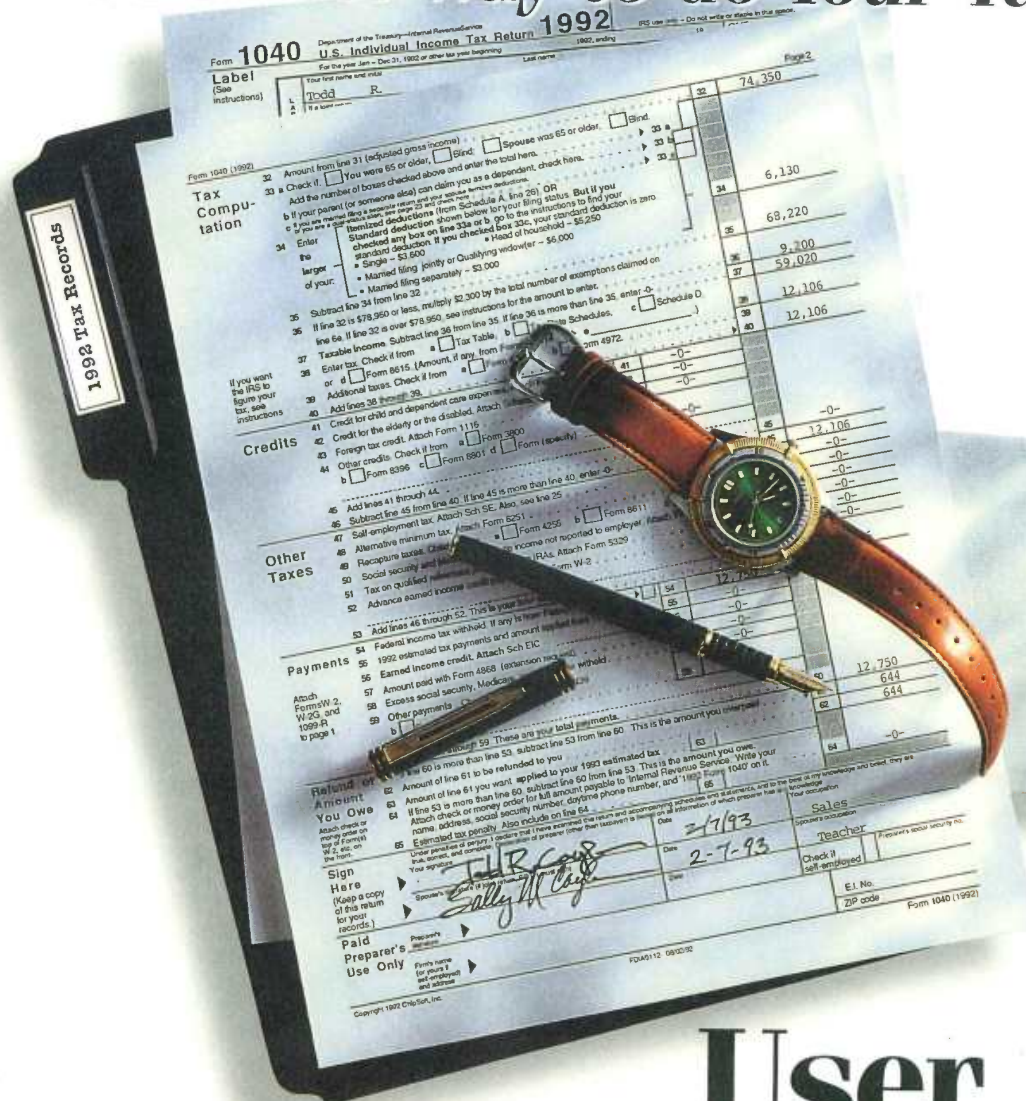
AMERICA'S

#1

BEST-SELLING TAX SOFTWARE

TurboTax®

The Easiest Way to do Your Taxes



User Manual

ChipSoft Technical Support

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TurboTax[®]

Personal/1040

For Tax Year 1992

User Manual

Version 10.0

ChipSoft

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TurboTax Registration

Please take a moment to fill out and return the TurboTax Registration Card that accompanies this manual (unless you purchased your program directly from ChipSoft). At ChipSoft, we're committed to bringing you quality customer service and technical support in a timely, courteous manner. Our Customer Assurance Plan ensures all registered TurboTax customers receive:

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Free Disk Replacement. If your program disks are damaged, we will replace them free of charge. Call (619) 453-1604. (See the License Agreement on the preceding pages for details).

Free Electronic Bulletin Board. All users with modems have free access to our electronic Bulletin Board Service (BBS) to obtain product information, release dates, send a technical question, or converse with other TurboTax users. The BBS numbers are (619) 453-5232 (for 300, 1200 and 2400 baud transmissions) and (619) 453-4165 (for 9600 baud transmissions).

Special Software Offers. We'll provide you with a number of special offers on software that you'll find to be exceptional values. You'll also receive special renewal and upgrade offers on ChipSoft products.

Toll-Free 800 Fax. The TurboTax fax machines are available for you to send a question to our Technical Support staff. Your fax will receive priority treatment so we'll get your problem solved quickly. The toll-free fax number is (800) 766-8890.

If you've purchased the HeadStart Edition of TurboTax, program registration is essential for you to receive the Final Edition ! You must use the Final Edition to finalize your tax return for the IRS.

The Final Edition is shipped free to all registered HeadStart purchasers.

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Introduction

TurboTax® for DOS is simply the best way to do your taxes. This award-winning program sets new standards of excellence each year and 1992 is no exception. Version 10.0 of TurboTax introduces the innovative EasyStep™ system that guides you through the entire tax return process, an attractive new look with easy-to-use buttons, and more tax forms and calculations than ever before.

TurboTax offers you two ways to prepare your tax return this year - the EasyStep approach or the Classic approach. We recommend you choose the EasyStep approach because that will allow the program to do as much as possible for you.

The EasyStep System

The EasyStep system is just what the name implies - a series of easy to understand steps that take you through the entire tax return process. All you have to do is read TurboTax's instructions on the screen and respond to them. All you need to know is how to use on-screen buttons and how to enter the information the program asks for. Since the EasyStep system takes care of everything else for you, your tax return will be completed quickly and easily.

The Classic Approach

We recommend the EasyStep approach because it's specifically designed to make tax preparation easy. However, if you're knowledgeable about taxes and software (perhaps because you've been using TurboTax for a few years), you might prefer to use the Classic approach. We've added features to the Classic approach that make it easy to prepare your tax return.

About TurboTax

Each year we develop accurate, informative and easy to use computer programs. TurboTax makes the preparation of your federal income tax return as pleasant as possible, but remember TurboTax relies on the information you enter. While the program offers you a tremendous amount of assistance, you are ultimately

responsible for the completeness of the tax return you submit to the Internal Revenue Service.

Read the License Agreement at the beginning of this manual before you install TurboTax on your computer. When you install TurboTax, you accept the terms of the License Agreement.

If you have a question about TurboTax, consult the program, the README file and this manual to see if we've answered your question. If we haven't, contact our Technical Support staff as explained in Chapter 10. For information about our TurboTax for Windows program that's designed for the Microsoft *Windows*[®] environment, contact our Personal Product Sales department as explained in Chapter 10. For information about our TurboTax ProSeries/1040 program that's designed for the professional tax preparer, call our Professional Sales department at (619) 453-6860.

Program Registration

If you purchased TurboTax from a dealer, please take a moment to fill out and return the TurboTax Registration Card that's included in your package or the TurboTax Registration and Order Form that's included in the program. Registered TurboTax users:

- are guaranteed access to **free** services and technical support
- receive immediate notification of any last-minute major tax law changes
- qualify for discounts on special offers and upgrades

If you purchased TurboTax directly from us, don't send in the Registration Card unless it's to inform us of a change in your address. We registered your program when we received your order.

The HeadStart Edition and the Final Edition

We complete the HeadStart Edition of TurboTax in October, based on preliminary information from the Internal Revenue Service. It's intended for those who want to get a head start learning the program or preparing their tax return. It's also intended for those who want to do 1992 or 1993 tax planning before 1992 ends.

The Internal Revenue Service does not accept the tax forms and schedules produced by the HeadStart Edition. You cannot file your tax return with the IRS until you have the Final Edition of TurboTax.

If you have the HeadStart Edition of TurboTax, make sure you're registered with us. This ensures that you'll receive the Final Edition of the program at no additional charge when it becomes available around mid-January. When you receive the Final Edition, simply install it and continue with your tax return. Information you entered with the HeadStart Edition will not need to be entered a second time.

All the tax forms and schedules produced by the Final Edition of TurboTax are approved for submission by the IRS, except Form 8453 in substitute format.

Be sure you're using the Final Edition of TurboTax when you finalize your tax return for submission to the IRS. If you're not sure which version you're using, check to see whether "HeadStart Edition" or "Final Edition" appears on the TurboTax title screen.

Hardware and Software Requirements

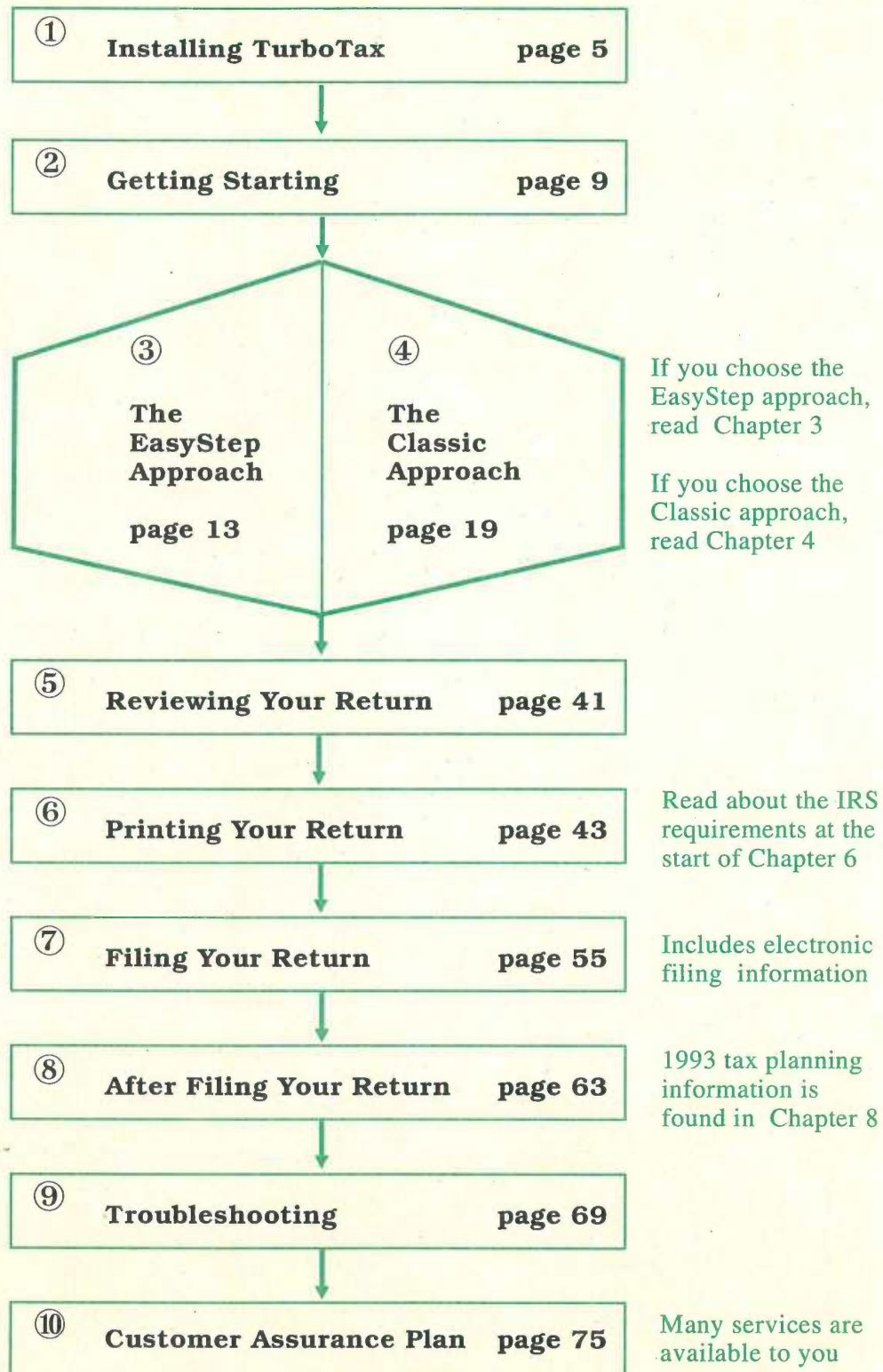
To use TurboTax, you need:

- an IBM Personal Computer (PC, XT, AT, PS/1 or PS/2), or a compatible
- a hard disk drive with at least 4.0Mb of space available
- a 5.25" or a 3.5" disk drive
- DOS Version 3.0 or greater
- at least 640K of RAM, with at least 512K of user-available memory
- a computer monitor and screen memory that is consistent with the various IBM PC compatible video adaptors
- a computer keyboard
- an impact printer, laser printer or ink jet printer (with additional software or hardware when necessary)

Note

A mouse (or similar device) is optional, but recommended. A modem can be used for electronic filing, but isn't required to file your return electronically. See Chapter 7 for details.

Road Map for the User Manual



Chapter 1

Installing TurboTax

The files on your TurboTax master disks contain a copy of TurboTax that's been compressed. The installation program on **DISK 1** decompresses these files while it copies them to your computer's hard disk drive. When the brief installation procedure is finished, TurboTax is ready for your use.

Installing TurboTax

Use the installation program on DISK 1 to install TurboTax on your computer's hard disk drive.

This section explains how to install the HeadStart Edition or the Final Edition of TurboTax. If you're installing the Final Edition after you've been using the HeadStart Edition, install the Final Edition in the directory that contains the HeadStart Edition. The tax return data you entered while using the HeadStart Edition will remain intact, so you will not have to enter that data a second time.

These instructions apply to both 3.5" disks and 5.25" disks. If you must install TurboTax from Drive B instead of Drive A, replace the letter "A" with the letter "B" in Step 2 and Step 3.

The installation program is set up to install TurboTax on Drive C in a directory it will create and name TTAX93. If you want to install TurboTax on a different drive or in a different directory, follow the instructions the installation program displays on the screen.

1. Make sure the cursor is at a DOS prompt (for example **C:\>**).
2. Place **DISK 1** in Drive A.
3. Type **A:** then press the **Enter** key to display the DOS **A:\>** prompt.
4. Type **INSTALL** then press the **Enter** key to start the installation program.
5. Follow the instructions on the screen.

If you're installing the Final Edition after you've been using the HeadStart Edition, use the same directory. The Final Edition will replace the HeadStart Edition in that directory, but your data file will not be affected.

After TurboTax has been successfully installed, the DOS prompt for your TurboTax drive and directory will appear. This is the directory and DOS prompt that you'll always go to when you want to start TurboTax. Store your TurboTax master disks now that the program is on your hard disk drive and ready to go. If you're ready to start TurboTax, go on to Chapter 2. If you need additional installation information, continue reading this chapter.

If You Used TurboTax Last Year

If last year's TurboTax program is still on your hard disk, install this year's program in a different directory. This will allow you to run last year's program and this year's program.

You'll probably want to transfer information from last year's data file into this year's tax return. If you also want to continue using last year's program, don't do anything with the files in last year's TurboTax directory. When you run **Transfer** in this year's program, remember last year's data file is in last year's directory.

If you **don't** want to use last year's program any more and you'd like to "free up" space on your hard disk, first use the DOS Copy command to copy last year's data file (or files, if you prepared more than one return) from last year's directory to this year's directory. An example of this command is:

```
COPY C:\TTAX92\TAXDATA*.91F C:\TTAX93
```

The exact command depends on the drive and directory location of last year's program and this year's program. When you run **Transfer** in this year's program, remember last year's data file is in this year's TurboTax directory.

Do not copy or delete files unless you're sure about what you're doing. Make sure you delete the files from last year's directory, not this year's directory!

After you've copied last year's data file(s) to this year's TurboTax directory, use the DOS Del command to delete all the files from last year's TurboTax directory. An example of this command is:

```
DEL C:\TTAX92\*.*
```


Once again, the exact command depends on the drive and directory of last year's program. After you've deleted all the files from last year's directory, use the DOS `Rd` command to remove last year's directory from your hard disk. An example of this command is:

RD C:\TTAX92

If You're Using Microsoft Windows

To set up TurboTax for Microsoft *Windows*[®], version 3.0 or greater, first run the installation program from the DOS prompt as explained above. After the installation procedure is complete:

1. Start Windows, then select the Program Manager.
2. Open the Non-Windows Applications group or create a new group for TurboTax.
3. Select the File Menu.
4. Choose "New".
5. Select "Program Item" from the New Program Object box and click on "OK".
6. Type "TurboTax 1040" or a similar description in the "Description" box.
7. Type **C:\TTAX93\TTAX.EXE** in the "Command Line" box.

If you installed TurboTax on a different drive or in a different directory, enter the appropriate command line. An example is **D:\FEDTAX92\TTAX.EXE**.

8. Choose "OK".

An icon for TurboTax will appear in the group you selected. When you want to run TurboTax, double click on the appropriate program group in the Program Manager, then double click on the TurboTax icon in that group.

Solving Installation Problems

If you have a problem installing TurboTax, make sure your computer is operating normally, then try the steps listed on the next page.

If you are unable to resolve the problem yourself, contact ChipSoft's Technical Support department as explained in Chapter 10. Our Intellisystem of recorded information is available 24 hours a day, 7 days a week, if you're using a touch tone phone. Follow the simple instructions to hear useful information about program installation.

If the installation program won't start

Check to make sure:

you placed **DISK 1** in Drive A,
the disk is fully inserted in the drive,
the drive door is closed,
you typed **Install** at the DOS **A:\>** prompt, and
you pressed the **Enter** key.

If you have a problem running the installation program

The following steps explain how to run the installation program from your hard disk, which might solve the problem. This approach requires at least 5.5 Mb of free space on your hard disk.

1. Use DOS to create a temporary directory on your computer's hard disk drive.
2. Use the DOS COPY *.* command to copy **all** the files on **each** of your TurboTax master disks from Drive A (or B) to that directory.
3. Run the installation program from that temporary directory. Make sure you install TurboTax in a different directory.
4. After TurboTax has been successfully installed, delete all the files from the temporary directory, then use DOS to remove the temporary directory from your hard disk.

If "Not enough available disk space on drive. Press any key" appears

This means less than 4.0 Mb of space is available on the hard disk drive on which you are attempting to install the program. Press any key to exit the installation program, then delete unneeded files from the hard disk drive until at least 4.0 Mb of space is available. Re-start the installation program after you've made sufficient space available on the drive.

If the installation program can't read one of the master disks

Make sure the correct disk is properly inserted in Drive A, then press **R** (for retry) to tell the installation program to try again.

If you have trouble starting TurboTax after you've installed the program

Read Chapter 2.

This chapter explains how to start TurboTax and begin your tax return. The chapter concludes with a discussion of the EasyStep approach and the Classic approach so you'll have a good idea which approach is best for you.

Starting TurboTax

These instructions assume you installed TurboTax on Drive C in a directory named TTAX93. If you installed the program in a drive other than Drive C, replace the letter "C" with that drive's letter in Step 2. If you installed the program in a directory other than TTAX93, replace "TTAX93" with the name of that directory in Step 3.

1. Make sure the screen cursor is at a DOS prompt.
2. Type **C:** then press the **Enter** key to display the DOS **C:\>** prompt.
3. Type **CD\TTAX93** then press the **Enter** key to move to the TTAX93 directory.
4. Type **TTAX** then press the **Enter** key to start the program. The TurboTax title screen will appear.
5. Press the **Enter** key when the message "Press Enter To Begin" appears on the title screen. You'll see the screen that introduces this year's TurboTax program.

If You Have a Problem Starting TurboTax

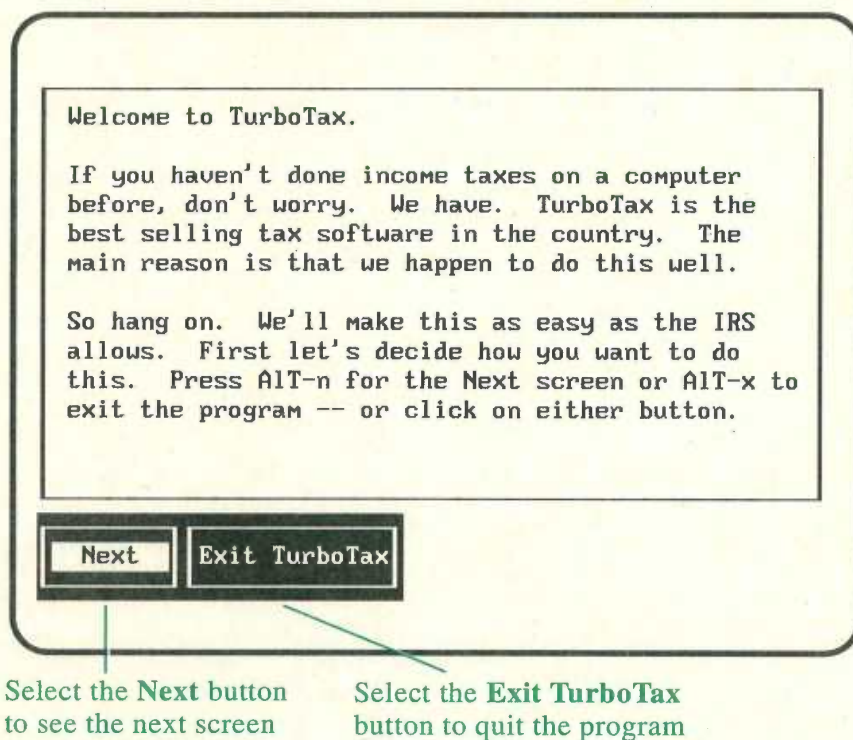
If the program starts but your screen doesn't look right, hold down the **Alt** key and press the **X** key to quit TurboTax, then try starting the program by typing:

- | | |
|---------------|--|
| TTAX C | for a Color monitor |
| TTAX B | for a "Black & White" graphics monitor |
| TTAX B | for an LCD monitor |
| TTAX M | for a Monochrome monitor |
| TTAX E | for an EGA or VGA monitor |

If TurboTax doesn't start at all, make sure your computer is operating properly and that you followed the instructions in the previous section. If these steps don't resolve the problem, refer to the troubleshooting suggestions in Chapter 9.

Beginning Your Tax Return

As you read the welcome message on the first screen, you'll notice a button labelled **Next** and a button named **Exit TurboTax**. Buttons are a convenient new feature of TurboTax. You'll be seeing buttons on the screen a lot, so let's see what they are and how you use them.



Buttons

Buttons provide a quick and easy way to interact with TurboTax using your keyboard or a mouse. A button's name indicates its function. With this first screen, the **Next** button means "continue to the next screen" and the **Exit TurboTax** button means "stop the program and return to DOS".

To select a button, either:

- Move the mouse pointer to that button, then click the **Left Button** on your mouse, or

- Hold down the **Alt** key and type the letter that's highlighted in the name of that button, or
- Press the **Enter** key to select a button that's highlighted

When you're ready to proceed to the next screen, select the **Next** button. You can use any of the three methods mentioned above, but pressing the **Enter** key is probably the easiest way because the **Next** button is highlighted. The highlight usually appears on the button you'll be most likely to need.

As you use the program, you'll also notice there are times when a button looks different. If you're using a color monitor, the name of the button will be shown in black letters. If you're not using a color monitor, the name will be shown in reverse video. When a button appears this way, it means it is not currently available.

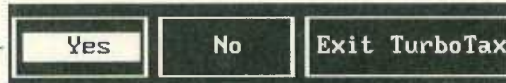
Would you like TurboTax to guide you in preparing your tax return the EasyStep way? Answer Yes.

EASYSTEP -- New! Recommended for most users. We'll ask you simple questions and guide you step by step through every tax form you need.

If you answer No, we'll go to the forms and you can use the classic TurboTax approach.

CLASSIC -- For expert TurboTax users. You should be very familiar with the program and the tax forms to do it this way.

The Yes button takes you to EasyStep



The No button takes you to the forms

The buttons on the second screen are named **Yes**, **No** and **Exit TurboTax**. You know what **Exit TurboTax** means. **Yes** and **No** represent your answer to the question "Would you like TurboTax to guide you in preparing your tax return?". Selecting the **Yes** button means you choose to take the EasyStep approach. Selecting the **No** button means you choose to take the Classic approach. We recommend you read the next section before you select either button.

EasyStep Approach and Classic Approach

We've designed the EasyStep system to take the worry out of preparing your tax return. EasyStep guides you through the steps that are necessary to complete your tax return, including a comprehensive tax interview. All you do is respond to the EasyStep questions and instructions - either by selecting the applicable button on the screen or by typing the appropriate data.

EasyStep will select the forms you need and will help you complete them. What's more, when you're ready EasyStep will review your return, help you correct it if necessary, print it, give you instructions for electronic filing, back up your data file, and take you to your TurboTax state program. The EasyStep system is, quite simply, the easiest way to do your taxes.

The Classic approach, on the other hand, puts you in the driver's seat. You control which form you want to see on the screen. You determine what data you need to enter and where on the form it should go. You use menus, commands and buttons to operate TurboTax, and you decide when you want tax help.

Choose the Right Approach for You

The EasyStep approach and the Classic approach have many things in common. All the forms, schedules and worksheets in TurboTax are available to you with both approaches. The same is true for all the TurboTax tax calculations and help features.

The basic difference between the two approaches is that the Classic approach requires more knowledge and decision-making. For that reason, we recommend you choose the EasyStep approach unless you're knowledgeable about taxes and you have experience preparing your tax return.

Don't worry that you might decide to take the approach that's "wrong" for you. One of the advantages of TurboTax is that you can switch between the two approaches whenever you want to. As you read further and use TurboTax, you'll see if you might want to switch between the two approaches and you'll learn how to do that.

If you decide to take the EasyStep approach,
select the **Yes** button and read Chapter 3.

If you decide to take the Classic approach,
select the **No** button and read Chapter 4.

Chapter 3

Using EasyStep

The first few EasyStep screens include four buttons. As you know, the **Next** button moves TurboTax forward to the next screen. Select the **Next** button whenever you're ready to continue. The **Previous** button moves TurboTax back to the previous screen. The **PrgmHelp** button displays an explanation of the buttons currently on the screen. The **Stop** button halts EasyStep temporarily so you can quit TurboTax or switch to the Classic approach.

The screenshot shows a window with a scroll bar on the right side. The text inside the window reads: "Many messages, such as this one, will be longer than the available space in this window. You'll see the Scroll Bar to the right and the word 'More' at the bottom when there is more. You can always use the DOWN ARROW or PAGE-DOWN keys (like right about now ... press PAGE-DOWN)". At the bottom of the window, there are four buttons: "Next", "Previous", "PrgmHelp", and "Stop". The "Next" button is highlighted. A green line points from the text "This button is currently highlighted" to the "Next" button. Another green line points from the text "Scroll bar" to the scroll bar on the right. A third green line points from the text "This indicates there is more information for this screen" to the word "More" at the bottom right of the window.

Many messages, such as this one, will be longer than the available space in this window.

You'll see the Scroll Bar to the right and the word "More" at the bottom when there is more.

You can always use the DOWN ARROW or PAGE-DOWN keys (like right about now ... press PAGE-DOWN)

More ↓

Next Previous PrgmHelp Stop

This button is currently highlighted

Scroll bar

This indicates there is more information for this screen

Next takes you to the next screen
Previous backs up one screen
PrgmHelp explains the buttons
Stop halts EasyStep

Some EasyStep screens have the word "More" at the bottom of the window and a scroll bar along the right side of the window. To see the additional information, either:

- Press the **Up** arrow, **Down** arrow, **PageUp**, **PageDown**, **Home** or **End** keys, or
- Move the mouse pointer above or below the indicator on the scroll bar and click the **Left Button** on your mouse

The position of the indicator on the scroll bar lets you know which portion of the message is currently displayed in the window.

The 10 Easy Steps to Prepare Your Return

This screen lists EasyStep's 10 easy steps. TurboTax explains each step to you as you reach it. You'll see the program checks off each step as you complete it so you always know where you are in the EasyStep system. Step 1, **Name tax return**, is highlighted and marked by a "pointer" to indicate it's the step you're currently at.

Step 1 is the current step

The 10 Easy Steps

Step 1. Name tax return
Step 2. Transfer
Step 3. Import
Step 4. Fill out forms
Income
Adjustments
Deductions
Credits
Taxes
Payments
Step 5. File Cabinet
Step 6. Final review
Step 7. Print return
Step 8. File electronically
Step 9. Backup return
Step 10. Prepare state
Completed Tax Return

These are the steps necessary to complete your tax return. We'll explain each task as we get there.

As we finish a given task, you will notice that the task will be checked off so you always know exactly where you are on the list.

Select Next to go to Step 1 and name this tax return.

Next Previous
PrgmHelp Stop

Next takes you to the next screen
Previous backs up one screen
PrgmHelp explains the buttons
Stop halts EasyStep

As you type the description that will identify your return, you'll see it appear in the data entry field at the bottom of the instruction window. When you're finished typing, press the **Enter** key. When you move on to the next screen, you'll notice Step 1 is checked off and Step 2 is highlighted. You'll also notice two new buttons. The **TaxHelp** button displays additional information about the current topic. The **EasyStep** button displays the **EasyStep Menu** that allows you to jump directly to any step in the EasyStep system (should you ever find that necessary).

Step 2 is **Transfer**. If you used TurboTax last year, we recommend you start this year's tax return by transferring information from last year's data file. Simply follow the instructions on the screen. Step 3, **Import**, involves the importing of data from a program other

than TurboTax. We recommend you use **Import** if you've been using *Quicken*[®], version 5 or greater.

The Forms Interview

Step 4, **Fill out forms**, is where you really begin to work on your return. You'll see the "getting-down-to-business" format that's shown below all during Step 4.

As you type information it appears in the EasyStep window

When you press the Enter key or click on the Next button, EasyStep places the information on the form

As we enter our first worksheet, you will notice the entire look of the screen has changed. This is the getting-down-to-business format we will use from here on out.

The first information you need to give us is the Taxpayer's first name and middle initial if they have one. Go ahead and start typing this in.

Next	Previous
TaxHelp	Stop
PrgmHelp	+ - / *
Itemize	Note
EasyStep	Summary

Personal Information Worksheet 1992

FileID _____

<p>Your Name:</p> <p>First Name..... </p> <p>Last Name..... _____</p> <p>Social Sec No..... _____</p> <p>Occupation..... _____</p> <p>Date of Birth: _____</p> <p style="padding-left: 20px;">MM/DD/YY..... _____</p> <p>Work Phone..... _____</p>	<p>Spouse Name:</p> <p>First Name..... _____</p> <p>Last Name..... _____</p> <p>Spouse SSN..... _____</p> <p>Spouse Occup..... _____</p> <p>Date of Birth: _____</p> <p style="padding-left: 20px;">MM/DD/YY..... _____</p> <p>Work Phone..... _____</p>
--	---

PERSONAL INFORMATION WORKSHEET
ENTER TEXT

The EasyStep forms interview format

You're already familiar with information windows and you know how to see the part of a message that extends beyond the window. You know how to use buttons and you're acquainted with the **Next**, **Previous**, **TaxHelp**, **PrgmHelp** and **Stop** buttons.

- The + - / * button displays a calculator.
- The **Summary** button displays a summary of your tax return.
- The **EasyStep** button displays the EasyStep Menu that you can use to go to a different step in the EasyStep system.
- The **Itemize** button can be used to create an itemized statement that details the individual amounts that comprise a total amount that's entered on the tax form.
- The **Note** button can be used to write reminder notes to yourself about any subject.

The screen shown on the previous page includes EasyStep's first request for information. As you type the Taxpayer's first name, it appears in the area near the bottom of the EasyStep window. When you press the **Enter** key, EasyStep places the name on the Personal Information Worksheet. When you press the **Enter** key, you're also selecting the **Next** button because it is highlighted. So you'll see a new message from EasyStep in the information window, asking you to type the Taxpayer's last name.

EasyStep will continue asking you for information in this manner. When EasyStep asks a question that's accompanied by a **Yes** button and a **No** button, simply select the appropriate button.

As you answer questions, different parts of the form or worksheet will appear on the screen. Your responses play a large part in determining EasyStep's questions and instructions. When EasyStep obtains all the information necessary for the form or worksheet on the screen, it gives you the opportunity to save the data you've entered before moving on to the next topic.

When you finish a particular topic, TurboTax displays the progress summary screen. The progress bar and percentage at the bottom of the screen indicate how much you've accomplished thus far. The window on the left shows you which of the pertinent categories of information you've completed and which remain to be done.

Tax Deductions:

- Medical expenses
- Tax expenses
- Interest expenses
- Investment interest
- Contributions
- Casualty losses
- Moving expenses
- Miscellaneous expenses

► Completed Deductions

We have finished the deduction category. You have now completed over 68% of this interview.

Now let's move on to see if you qualify for any tax credits.

Next Previous EasyStep

PrgmHelp Stop TaxHelp

Income | Adjs | Deductions | Credits | Taxes | Pymts | 64% Done

Deduction categories

A ✓ means you've completed that category

Progress bar

Percentage of the interview that you've completed

Data Entry Tips

- The forms and worksheets have two types of data fields - text and numeric. All characters can be entered into a text field, but only numbers can be entered into a numeric field.
- TurboTax alerts you if you type information that is not in the correct format or that exceeds the range of acceptable values.
- You can change information that you previously entered if you find that necessary.
- The **Override** button replaces the **Itemize** button when you might need to change a number (or text) that's calculated by TurboTax. When special circumstances apply, select the **Override** button, then enter the number you've calculated. Use the **Override** button only when you're sure the number you've calculated is correct for your tax situation.
- Step 5, **File Cabinet**, provides a convenient way to enter last-minute information.
- Step 6, **Final Review**, alerts you to "inappropriate" information and other situations you should double check before you finalize your tax return.

Getting Tax Assistance

Earlier in this chapter, we mentioned that you can see additional tax information when the **TaxHelp** button is highlighted. An example of the TaxHelp screen is shown on the next page. You'll notice some buttons you haven't seen before.

- The **Print** button prints the current TaxHelp information.
- The **IRS** button displays the IRS instructions for the current form.
- The **Explain** button displays more information about the word or phrase that's yellow (on a color monitor) or blinking (on a monochrome monitor).

If you want information about a word or phrase that's light blue or in reverse video, use the **Left** and **Right** arrow keys or your mouse to select the **Topic >** button or the **< Topic** button to move the highlight forward or backward in the window. When the word or phrase you are interested in turns yellow or begins to blink, select the **Explain** button.

- The **Done** button is similar to the **Previous** button, but **Previous** backs up one screen at a time while **Done** returns to the original screen all at once, even if that means backing up through several TaxHelp screens.

The **TaxHelp** button displays the Tax Help screen

Tax Help screen

Done removes the Tax Help screen
Explain explains the highlighted phrase
 The **Topic** buttons move the highlight
IRS displays the IRS instructions
Print prints the Tax Help information

Quitting TurboTax and Saving Your Data

When you want to quit TurboTax, select the **Stop** button to stop EasyStep temporarily. If you want to quit the program, select the **Exit TurboTax** button. If you've entered data that hasn't been saved, TurboTax will ask if you want to save your tax return.

Select the **GotoForm** button if you want to switch to the Classic approach instead of quitting the program. Read Chapter 4 for information on using the Classic approach.

When you want to resume working on your tax return, start TurboTax according to the instructions in Chapter 2. EasyStep will start at the exact place you last stopped it. However, if you've saved more than one tax return, TurboTax will list the names of those tax returns so you can select the return you want to see.

Chapter 4

The Classic Approach

When you choose the Classic approach, you see a screen with five buttons. You know the **Next** button moves TurboTax forward to the next screen. The **Previous** button moves TurboTax back to the previous screen.

The **PrgmHelp** button defines various program buttons and explains how to use them. The **ReadMe** button is very important because it presents “last minute” information about the program. The **WhatsNew** button explains how TurboTax has changed from last year.

Starting Your Tax Return

Data entry cursor

Personal Information Worksheet 1992

Tax Return Name...

Your Name: First Name..... Last Name..... Social Sec No..... Occupation..... Date of Birth: MM/DD/YY..... Work Phone..... Extension..... Home Phone..... Address..... City.....	Spouse Name: First Name..... Last Name..... Spouse SSN..... Spouse Occup..... Date of Birth: MM/DD/YY..... Work Phone..... Extension.....
--	---

FEDERAL FILING STATUS:
Using the following codes, enter 1, 2, 3, 4 or 5 for your
Federal Filing Status..... 1.

Help	Override	Note	Itemize	CrossRef	Calc	Forms	Menu
------	----------	------	---------	----------	------	-------	------

PERSONAL INFORMATION WORKSHEET Enter text

Data fields

Buttons

Select the **Next** button to move on to the screen shown above. Before we discuss the buttons and worksheet you see on this screen, let's start your tax return by giving it a name. Type a description in the “Tax Return Name” field that's marked by the cursor, then press the **Enter** key.

Navigating the Screen

As you examine the screen, you see the beginning of the TurboTax Personal Information Worksheet. This worksheet is where you enter personal information about yourself and, if you're married, your spouse. TurboTax transfers information from this worksheet to the other forms in your return automatically.

The instructions on a form or worksheet are called **Form Text**. The areas of a form where you can enter information are data fields. As you look at the current screen, you'll notice the data entry cursor has moved to the data field that is to the right of the **Form Text** label "First Name".

Most of the forms in TurboTax are longer than your screen. As you move the cursor on a form, TurboTax scrolls the form so the cursor always remains on the screen.

- The arrow keys and the **Enter** key move the cursor from one data field to the next.
- The **Page Up** and **Page Down** keys move the cursor from one section of the form to the next.
- The **Home** and **End** keys move the cursor to the beginning and the end of the form.

You can also use a mouse to navigate around the form.

- To move the cursor to a data field, place the mouse pointer on the field, then click the **Left Button**.
- To scroll a form toward its beginning, place the pointer on the top half of the screen, then click the **Right Button**.
- To scroll a form toward its end, place the pointer on the bottom half of the screen, then click the **Right Button**.
- To stop the scrolling of a form, click the **Right Button** again.

Data Fields

To enter data into a field on a form or worksheet:

1. Move the cursor to the data field.
2. Type the information.
3. Press the **Enter** key or click the **Left** mouse button.

As you type information, it appears in the field that's marked by the cursor. If you make a mistake while typing, use the **BackSpace** key to correct the entry. When you press the **Enter** key or click the **Left Button** on your mouse, the cursor moves to the next data

field on the form in a left-to-right, top-to-bottom fashion the way you read.

Enter Text Fields

Enter Text fields are the areas into which you enter text information like names, dates, addresses and descriptions. **Enter Text** fields are indicated by underlines when they don't contain information. **Enter Text** fields are light blue on a color monitor and high intensity on a monochrome monitor. Use the letter, number and character keys to enter information into an **Enter Text** field. Hold down the **Shift** key for upper case characters. You can use the **Insert** key to change between Insert Mode and Overtyping Mode. "Ins" or "Ovr" at the bottom of the screen indicates the current mode.

- To change the information in an **Enter Text** field, press the **Alt** and **V** keys to select the **Edit field** command.
- To erase the information from an **Enter Text** field, press the **Alt** and **D** keys (or the **F2** function key) to select the **Clear field** command.

Transferred Text Fields

Transferred Text fields are like **Enter Text** fields except TurboTax enters information into these fields automatically, based on information in your return and IRS instructions. **Transferred Text** fields are also indicated by underlines when they don't contain information. **Transferred Text** fields are light gray on a color monitor and low intensity on a monochrome monitor.

- To enter information into a **Transferred Text** field, or to change the information that TurboTax has entered, use the **Override** button as explained in the next section.

Enter Amount Fields

Enter Amount fields are the areas into which you enter numbers. **Enter Amount** fields are indicated by a "0." when they don't contain information. **Enter Amount** fields are light blue on a color monitor and high intensity on a monochrome monitor. Use the number keys to enter information into an **Enter Amount** field. If you press the **Num Lock** key to activate the numeric keypad, "NumL" will appear at the bottom of the screen. To move the cursor while you're using the numeric keypad, hold down the **Shift** key before pressing the arrow keys.

- To enter a negative number, type the - (minus) key before the amount.

- When entering a large number, do not type the , (comma) key. TurboTax will add the comma to the number when you press the **Enter** key.
- When entering a dollar and cents amount or a percentage, type the . (decimal point) key. If the field only allows for whole dollar amounts, TurboTax will round the amount to the nearest dollar according to the IRS instructions.
- To change the number in an **Enter Amount** field, simply enter the new number.

Calculated Amount Fields

Calculated Amount fields are like **Enter Amount** fields except TurboTax enters numbers into these fields automatically, based on information in your return and IRS instructions. Some **Calculated Amount** fields involve arithmetic on the form, while others involve the transfer of information between forms. **Calculated Amount** fields are light gray on a color monitor and low intensity on a monochrome monitor.

- To enter a number into a **Calculated Amount** field, or to change a number that TurboTax has entered, use the **Override** button as explained in the next section.

If you're not sure which type of field the cursor is on, look at the bottom right part of the screen to see whether **Enter Text**, **Transferred Text**, **Enter Amount** or **Calculated Amount** is displayed. If you try to enter an invalid number or letter into a data field, TurboTax will let you know. If that occurs, check to see which numbers or letters are valid, then enter the correct data.

The Standard Buttons

The **Standard Buttons** at the bottom of the screen represent eight commands you are likely to use often. These buttons remain on the screen almost all the time when you use the Classic approach. You select a **Standard Button** the same way you selected the buttons you've already seen. Either hold down the **Alt** key and press the letter that's highlighted on the button, or place the mouse pointer on the button and click the **Left** button on the mouse. When a button is not available, all the letters in its name are black on a color monitor and low intensity on a monochrome monitor.



Help

The **Help** button displays the **Help Menu**. You can use the **Help Menu** to get assistance completing the form on the screen, to switch to the EasyStep system, and to see the IRS instructions for the form on the screen. We'll discuss the **Help Menu** in greater detail when we review the TurboTax menus later in this chapter.

Override

If you want to change the information in a **Calculated Amount** or **Transferred Text** field, move the cursor to that field, then select the **Override** button. **OVERRIDDEN** will appear at the bottom of the screen and you can enter the information you want at that time. **OVERRIDDEN** fields are red on a color monitor and high intensity on a monochrome monitor.

You can use the **Override** button to enter an estimated amount into a **Calculated Amount** field, to change the amount in a **Calculated Amount** field because of an exception to the standard IRS rules, or to change the information in a **Transferred Text** field.

TurboTax will not change the information in an **OVERRIDDEN** field unless you use the **Override** button again to change the field from **OVERRIDDEN** back to **Calculated Amount** or **Transferred Text**. If you do that, the program will replace the information that you entered with the number that it calculates for you the next time you use the **Calc** button or the **Calculate return** command,

Note

If you want to write a reminder note to yourself, select the **Note** button, then type the message in the note window. If you need assistance, select the **Help** button on the Note window. When you're done, select the **Done** button. TurboTax will display a triangle at the right side of that line on the tax form to let you know a reminder note is attached to it.

To change the contents of a note or to delete it, move the cursor to the line with the triangle, select the **Note** button, then use the buttons on the Note window. You can use the **Reminder notes** command that we'll discuss in the menus and commands section of this chapter to find all the reminder notes in your return .

Itemize

If you want to create an itemized statement with several descriptions and amounts for a specific numeric data field, move the cursor to the **Enter Amount** or **OVERRIDDEN** field, select the **Itemize** button, then enter the appropriate information in the Itemized Statement window.

Select the **Help** button if you need assistance. When you're done, select the **Done** button. **Itemize Stmt** will appear at the bottom of the screen and TurboTax will copy the total amount from the itemized statement to the data field. **Itemize Stmt** fields are brown on a color monitor and low intensity on a monochrome monitor.

You can use the **Itemize statement** command that we'll discuss in the menus and commands section of this chapter to find all the itemized statements in your return.

CrossRef

The **CrossRef** button lists the source (or sources) for data that can be transferred to the **Calculated Amount** field that is marked by the cursor. The window also indicates the current value at each source. When you select the **GotoForm** button, TurboTax takes you to the line on the form that's highlighted in the window. Use the **Topic >** and **< Topic** buttons to move the highlight when more than one source is listed in the window. A cross reference is available for every numeric field that can receive information from another form, schedule or worksheet.

If you need assistance, select the **Help** button on the Cross Reference window. Select the **Print** button to print all the cross references for a form. When you're done, select the **Done** button.

Calc

When you select the **Calc** button, TurboTax performs all the arithmetic and information transfers that are appropriate for your return. The program updates the information in the **Calculated Amount** and **Transferred Text** fields only when it calculates your return. When you are entering or changing data, you should select the **Calc** button frequently to keep the display current.

Forms

The **Forms** button displays the **Form Selection Menu** that you use to change the form on the screen. We'll discuss the **Form Selection Menu** in the *Navigating the Forms* section on the next two pages.

Menu

The **Menu** button displays the **Main Menu** at the top of the screen. You use the **Main Menu** to select program commands that are not represented by a button. We'll discuss the **Main Menu** and all the commands in the *Menus and Commands* section later in this chapter.

Navigating the Forms

TurboTax places the Personal Information Worksheet on the screen when you start the program. After that, you control which forms are displayed. When you want to replace the form on the screen with a different form, schedule or worksheet, select the **Forms** button to display the **Form Selection Menu**.

Forms and their worksheets Schedules and their worksheets Forms, schedules and worksheets in use

Forms	Schedules	In use
Form 1040	Schedule A	Pers Data
* Pers Data	Sch A-Med	Fm 1040EZ
W-2 Income	Taxes/Int	
W-2G Income	Sch A-Contr	
1099-Misc	Sch A-Misc	
1099-R	Sch A-Limit	
Line 7 Wks	Schedule B	
Tax Refund	Interest	
Soc Sec Wks	Dividend	
Excess SS	Schedule C	
Line 22 Wks	Sched C-EZ	
IRA Wks	Schedule D	
Dependent	Schedule D1	
Line 36 Wks	D-Extra	
Health	Passive D	
Form 1116	D Summary	

SELECT FORM: Personal Information Worksheet

GotoForm
Cancel

Form that is currently highlighted on the menu GotoForm button displays the highlighted form

Form Selection Menu

The **Forms** column lists all the IRS forms together with the worksheets that support those forms. Form 1040 is followed by the other forms in numeric order (Form 1116, Form 2106, etc.). There are more entries than appear on the screen at one time. At the end of the list are Form 1040A, Form 1040EZ, Form 1040-ES and Form W-4. Worksheets are indented below the forms they support.

The **Schedules** column lists all the IRS schedules in the program together with worksheets indented below the schedules they support. The lettered schedules are presented in alphabetical order (Schedule A, Schedule B, etc.). There are more entries than appear on the screen at one time. At the end of the list are Schedules 1, 2 and 3 for Form 1040A, the Which Forms To Complete Worksheet, the What-If? Worksheet, the Tax History Worksheet, and the TurboTax Registration Card and Order Form.

The **In Use** column lists the forms, schedules and worksheets that are currently active in your return. Forms, schedules and

worksheets are added to this column as you enter more information into your return.

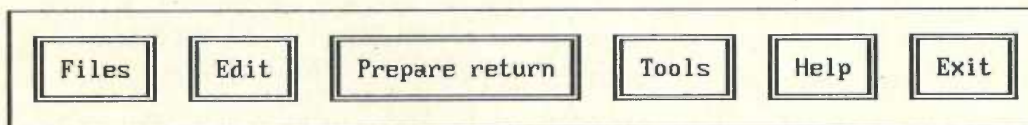
To tell TurboTax which form, schedule or worksheet you want to see, first use the cursor control keys or your mouse to move the highlight to the appropriate name on the menu. Next, press the **Enter** key to select the **GotoForm** button, or move the mouse pointer to the **GotoForm** button and click the **Left Button**.

When you select a form, schedule or worksheet for display, the **Form Selection Menu** will disappear and your selection will replace the form that was on the screen. However, if TurboTax contains more than one copy of the form, schedule or worksheet you've selected, the program will display a window that identifies each copy so you can select the copy you want to see.

When there's an asterisk (*) before an entry in the **Forms** column or **Schedules** column, that form, schedule or worksheet is also listed in the **In Use** column because it contains relevant information. You might have entered the information on the form, or TurboTax might have transferred the information there for you. When there's a question mark (?) before an entry in the **Forms** or **Schedules** column, it means your answers on the **Which Forms to Complete Worksheet** indicate you probably need to enter information on that form, schedule or worksheet.

Menus and Commands

TurboTax can perform many tasks for you. You simply need to tell the program what you want it to do by selecting the appropriate command from a menu or, in some cases, by selecting one of the **Standard Buttons**. You'll recall the **Menu** button displays the **Main Menu**, which is shown below. The **Files Menu**, **Edit Menu**, **Prepare Return Menu**, **Tools Menu**, **Help Menu** and **Exit Menu** are displayed below the **Main Menu** when you select the corresponding command from the **Main Menu**.



To Display the Main Menu

- Select the **Menu** button by pressing the **Alt** and **M** keys or by clicking on it with the **Left** mouse button, or
- Press the **F7** function key or the / (forward slash) key, or
- Click the **Left** and **Right** mouse buttons simultaneously

When the **Main Menu** is on the screen, you can select a command from the **Main Menu** or you can select a **Standard Button**, but you can't enter data into your tax return.

To Choose a Command from a Menu

- Press the **Left**, **Right**, **Up** or **Down** arrow keys until the highlight is positioned over the command, then press the **Enter** key, or
- Type the letter that matches the highlighted letter in the command, or
- Position the mouse pointer on the command, then click the **Left Button** on your mouse

You can issue several commands simply by pressing the appropriate speed keys. Most speed keys are a combination of the **Alt** key and another key. The function keys are also speed keys. The speed keys for a command are listed on the menu. They are also shown on the back cover of this manual. You'll also find a useful summary of the menu system inside the back cover.

You must exit the menu system before you can enter data into your tax return. Some commands do this for you automatically. However, if you've selected a command that doesn't exit the menu system or if you don't want to select a command, you must remove all menus and windows from the screen in order to return to data entry mode.

To Exit the Menu System

- Select the **Exit** command from the **Main Menu**, then select the **Exit menu** command from the **Exit Menu**, or
- Press the **Escape** key repeatedly to remove each menu or window from the screen, or
- Click the **Right Button** on your mouse repeatedly to remove each menu or window from the screen

Now that you know how to operate the menu system, let's review the commands on each menu that "pulls down" from the **Main Menu**. We'll discuss some of these commands in more detail later. In this section, we'll address the menus in the following order: **Exit**, **Tools**, **Edit**, **Files**, **Help**, **Prepare Return**.

If you try a command on your own, just follow the instructions on the screen. You can always select the **Cancel** button or press the **Escape** key to "back up". If you find yourself back in data entry mode without the **Main Menu** on the screen, simply select the **Menu** button to display it again.

Exit Menu

The **Exit Menu** is used to exit the menu system or the program.

Exit

- **Exit menu** removes the **Main Menu** from the screen and returns you to data entry mode.
- **Exit TurboTax** stops the program and returns you to the DOS prompt.

Exit menu
Exit TurboTax

Tools Menu

The **Tools Menu** helps you prepare your tax return. The **Calculate return**, **Cross reference**, **Itemize statement** and **Reminder notes** commands correspond to the **Calc**, **CrossRef**, **Itemize** and **Note** buttons that we've already discussed. The **Itemize statement** and **Reminder notes** commands are more versatile than the **Itemize** and **Note** buttons, however, because they can also help you find all the itemized statements and reminder notes in your return.

Tools

Calculate return	Alt-C
Cross reference	Alt-R
Calculator	Alt-K
Itemize statement...	Alt-I
Reminder notes...	Alt-T
Previous form	Alt-B
Tax summary window	Alt-U

- **Calculator** displays a multipurpose calculator on the screen.
- **Previous form** displays the form (or forms) you were previously working on.
- **Tax summary window** displays a "quick look" summary of your tax return.

Edit Menu

The **Edit Menu** commands are used to change the information in your tax return and to alter the way TurboTax operates. **Override field** is the same as the **Override** button.

Edit

Edit field	Alt-U
Clear field	Alt-D
Override field	Alt-O
Erase form	
Program options...	

- **Edit field** is used to change the information in a text field that's marked by the cursor.

- **Clear field** clears the information from the field marked by the cursor.
- **Erase form** removes all the information from the form on the screen.
- **Program options** displays the **Program Options Menu** that's used to control certain aspects of the way TurboTax looks and performs. This menu has the following selections:
- **Monitor options** displays the **Monitor Options Menu**. Use **Type of monitor** to specify your type of monitor if TurboTax is unable to identify it. Use **Snow flag** to eliminate "snow" if it appears on the screen.
- **Auto calculate** tells TurboTax whether you want it to calculate your tax return automatically every time you enter numeric information.
- **Scroll form** tells TurboTax whether you want the form to scroll while the cursor stays in the middle of the screen, or whether you want the form to stay still while the cursor moves around on the screen.
- **AutoSave options** tells TurboTax whether it should save the new value of a program option (like **Monitor options**, **Auto calculate** or **Scroll form**) when you change its value.

Some options can be set ON or OFF. An X in the box on the menu indicates the option is ON, while an underline in the box indicates the option is OFF. To change the value of an option from ON to OFF or vice versa, move the highlight bar onto that command on the menu then press the **Enter** key, or move the mouse pointer onto the command then click the **Left Button**.

The procedure for changing the value of a more complex option involves a menu or prompt on the screen. An example of this type of option is the **Select Printer** command on the **Printer Setup Menu** that you use to specify your make and model of printer.

If you change the value of an option, remember the **AutoSave options** command controls whether TurboTax stores that new value for the future. The only time you should set **AutoSave options** to **OFF** is when you're going to change the value of one or more options and you do **not** want to use those new values the next time you start TurboTax.

Files Menu

The **Files Menu** commands involve data files and your tax return in various ways.

- **New tax return** is used to start a tax return.

- **Open tax return** is used to resume working on a previously saved tax return.
- **Delete tax return** is used to delete a tax return data file.
- **Save tax return** saves your tax return information to a data file.
- **Revert to saved** is used to work on the last saved version of a tax return.
- **Directory** gives you the choice of **Set directory**, which allows you to change the drive or directory in which TurboTax stores data files, and **View directory**, which is similar to the DOS command DIR.
- **Print** displays the **Print Menu** that's used to print your tax return, itemized statements and reminder notes.
- **Printer Setup** displays the **Printer Setup Menu** that you must use to set up TurboTax for your printer.
- **Shell to DOS** pauses TurboTax and returns you to DOS until you type "exit" to return to TurboTax.
- **Exit TurboTax** stops TurboTax and returns you to DOS.

Files	
New tax return	Alt-A
Open tax return	
Delete tax return	
Save tax return	Alt-S
Revert to saved	
Directory...	
Print...	Alt-P
Printer Setup...	
Shell to DOS	Alt-Z
Exit TurboTax	Alt-X

Help Menu

The **Help Menu** commands assist you with the operation of TurboTax and the preparation of your tax return.

- **Goto EasyStep** displays the EasyStep Menu that you can use to enter the EasyStep system at any step.
- **Continue EasyStep** resumes the EasyStep system at the place you previously left it. *This command is not listed on the menu if you haven't used EasyStep.*
- **Tax help for this line** displays the EasyStep help for the data field that's marked by the cursor. The EasyStep window disappears when you press **Enter** or select the **Next** button.

Help	
Goto EasyStep	F1
Continue EasyStep	Alt-E
Tax help for this line	Alt-F1
IRS instructions	F8
Other topics...	

- **IRS instructions** displays the IRS instructions for the current tax form. A scroll bar on the right side of the window indicates which portion of the instructions are currently displayed. Use the cursor control keys or your mouse to scroll the contents of the window. (IRS instructions are not available in the HeadStart Edition.)
- **Other topics** displays a menu with a variety of choices. **View readme** displays the “last-minute” information that is contained in the README file. **View what’s new** tells you about this year’s version of TurboTax, the 1992 tax laws, and changes in the tax laws for 1993. **Registration card** displays the Registration Card and Order Form. **Which forms** displays the Which Forms To Complete Worksheet.

When a **Help Menu** command displays information in a window, read the information and use the buttons that accompany the window. When there’s more information than will fit in the window, the word “More” appears in the bottom border of the window and there’s a scroll bar on the right border. You can use the arrow keys, **PageUp** and **PageDown** keys, or your mouse to scroll the information in the window.

When the **TaxHelp** button is highlighted, you can obtain additional information by selecting the **TaxHelp** button. When there are highlighted words or phrases in a TaxHelp window, you can access TurboTax’s intelligent, interactive system of information. If you want more information about a word or phrase that’s yellow or blinking, select the **Explain** button. If you want information about a different highlighted word or phrase, press the **Left** or **Right** arrow keys or use your mouse to select the **< Topic** button or the **Topic >** button to move the highlight toward the beginning or end of the window. When the word or phrase you are interested in turns yellow or starts blinking, select the **Explain** button.

Prepare Return Menu

We’ve saved the **Prepare Return Menu** for last because it represents the 11 overall processing steps that comprise the Classic approach. You’ve already completed Step 1, **Name tax return**. We’ll discuss Steps 2, 3, 4 and 5 in the next section of this chapter. The remaining steps are covered in later chapters. Briefly, the **Prepare Return** steps are:

- **Step 1 - Name tax return** is used to assign a name to your tax return.
- **Step 2 - Transfer** imports information from a data file used with last year’s TurboTax.
- **Step 3 - Import** imports data from a program like *Quicken*®.
- **Step 4 - Select forms** displays the **Form Selection Menu**.

- **Step 5 - File Cabinet** is an easy way to enter specific categories of information.

- **Step 6 - Final review** checks your return for omissions of data, inconsistent data, Overridden fields, itemized statements and notes.

Prepare return

Step 1	Name tax return
Step 2	Transfer
Step 3	Import... Quicken
Step 4	Select forms
Step 5	File Cabinet
Step 6	Final review
Step 7	Print return
Step 8	File Electronically
Step 9	Backup return
Step 10	Prepare state
Step 11	Tax planning

Depending on the information in your return, **Final review** also suggests ways you might be able to reduce your tax liability and points out areas in your return that might trigger an audit.

- **Step 7 - Print return** prints your tax return.
- **Step 8 - File Electronically** explains the electronic filing procedure.
- **Step 9 - Backup return** is used to make a backup copy of the data file with your tax return and the EasyStep history file for that return.
- **Step 10 - Prepare state** is used to go directly to your TurboTax state program.
- **Step 11 - Tax planning** is used for 1993 tax planning.

Entering Your Tax Return Data

Now that you've reviewed the TurboTax features and commands that help you prepare your tax return, it's time to start entering your tax return information. Remember all the TurboTax help features are available while you're preparing your return. If you ever have a question, simply select the **Help** button or press the **F1** function key to display the **Help Menu**, then select a command.

The TurboTax features that you can use to enter data into your tax return are discussed in the order you might use them. These features are Steps 2, 3, 4 and 5 on the **Prepare Return Menu**.

Step 2 - Transfer

Step 3 - Import

Step 4 - Select forms

Step 5 - File Cabinet

You can use one or several of these features to prepare your tax return. As we discuss each alternative, we'll explain why, when and how to use each feature. After reviewing this information, use the approach or approaches you think are best for you.

Step 2 - Transfer

If you used TurboTax last year (and you still have last year's data file), use the **Transfer** command on the **Prepare Return Menu**. TurboTax will transfer your carryover data and certain other information from last year's data file to this year's tax return quickly. **Transfer** should be used first because it erases any data on this year's forms before entering data from last year's data file.

Note

If you don't use **Transfer**, you should review your 1991 tax return to see if you have data that is carried over from 1991 to 1992. This can include passive loss carryovers, capital loss carryovers and depreciation information. Passive loss carryovers are entered on the Passive Activity Summary Worksheets. Capital loss carryovers are entered on Schedule D. Use the **Enter Asset** command on the **Depreciation Menu** to enter depreciation information on the Depreciation and Amortization Worksheet.

To use the **Transfer** command:

1. Select the **Menu** button to display the **Main Menu**.
2. Select **Prepare return** from the **Main Menu**.
3. Select **Transfer** from the **Prepare Return Menu**.
4. Type **N** (for No) after "Save this return (Y/N)?" appears.
5. Type the drive and directory for last year's data file when the program prompts you for that information.
6. Move the highlight bar onto the name of last year's data file, then press the **Enter** key.
7. Answer the questions that are displayed on the screen.

The program asks about numerics, supporting statements, reminder notes and an exception report. Type **Y** (for Yes) or **N** (for No) to answer each question.

Your answer to the "Transfer numeric information?" question determines whether or not non-depreciation and non-carryover numeric information is transferred. If you've been using last year's program for tax planning or record keeping purposes, you should answer **Y** to the "Transfer numeric information?" question. All the text information in last year's data file is transferred, regardless of your answers to the **Transfer** questions.

If you answer **Y** to the "Generate Exception Report?" question, TurboTax keeps track of the numeric information it cannot transfer

because of significant differences between last year's and this year's tax forms. When the **Transfer** procedure is complete, the program will display a list of any non-transferred information according to last year's form and line number.

If you didn't use the **Next year** command in last year's program to prepare the file for 1992, depreciation and carryover information is updated as it is transferred into this year's return.

When **Transfer** is finished, check the exception report (if any), then select the **Forms** button. Review the forms that are listed in the **In Use** column on the **Form Selection Menu** and edit the information that was transferred to those forms if necessary.

Step 3 - Import

If you use a financial management program, a spreadsheet or a text file to record tax-related information, you can use the **Import** command to transfer that information to this year's tax return.

Import can be used at any time because it adds imported amounts to amounts that are already on the forms. However, it's best to use **Import** early so you can see the results more clearly.

If you're using a program like *Quicken*[®], version 5 or greater, that has pre-defined categories and a tax report feature designed for tax preparation programs, that program can create an Import file quite easily. The next section tells you what you need to know.

You can use the **Import** command if you've been recording tax-related information in a program that isn't specifically designed to produce a file for import by a tax program, but it is a more involved process. You must assign an Import Code to each unit of data to be imported into your tax return, and the codes and data must be in an ASCII format file. If you are interested in this process, contact the ChipSoft Technical Support staff as explained in Chapter 10. Our staff can provide you with a list of the Import Codes and instructions on how to set up an Import file. This can be done by mail, fax or electronic bulletin board.

Importing Data from Quicken Version 5 or Greater

The **Import** procedure is simple if you are using *Quicken*, version 5 or greater, or a similar program that takes advantage of the Tax Exchange Format. The three basic steps are:

1. Whenever you enter a transaction, assign it to the appropriate tax category (or sub-category).
2. Produce a tax report to be used by **Import**.
3. Run **Import** (as explained below) to transfer the data from that tax report file to your tax return.

If you're using *Quicken*, version 5 or greater, refer to the *Preparing Your Income Taxes* chapter of the Quicken manual for more detailed information. Be sure to read *Assigning Categories to Tax Forms* and *Transferring Data to a Tax Preparation Program* in that chapter. You'll see Quicken has a standard list of categories assigned to specific tax forms and lines. You might want to assign additional categories to other tax forms and lines.

After you've produced an Import file with the data from *Quicken*, access the tax return into which you want to import the data, then:

1. Select the **Menu** button to display the **Main Menu**.
2. Select **Prepare return** from the **Main Menu**.
3. Select **Import** from the **Prepare Return Menu**.
4. Select **Import Directory** from **Import Data Menu**, then type the drive and directory for the Import file.
5. Select **Import filename** from the **Import Data Menu**, then type the filename of the Import file.
6. Set **Itemize Statements** to ON if you want TurboTax to create an itemized statement when a number is imported to a field that already has a number. Leave **Itemize Statements** OFF if you want TurboTax to add numbers together without creating itemized statements.
7. Choose **Go to Import** from the **Import Data Menu**.
8. Review the Import Summary window, then press **Enter** to start the Import Data procedure.
9. Type **Y** (for Yes) if TurboTax asks if you want to see a list of the data that was **not** imported into your tax return.

When **Import** is finished, review the forms that are listed in the **In Use** column on the **Form Selection Menu** and edit the information that was imported to those forms if necessary.

Step 4 - Select Forms

Select Forms is the data entry method that's most like preparing tax forms by hand because you determine which forms, schedules and worksheets you want to work on. Choosing **Select Forms** is the same as selecting the **Forms** button. In either case, TurboTax displays the **Form Selection Menu** that's discussed in *Navigating the Forms* earlier in this chapter. You use the **Form Selection Menu** to select a form, schedule or worksheet to work on, then you enter data on that form using the techniques that are discussed in *How to Enter Data* earlier in this chapter. Be sure to read *Special TurboTax Features* on the next page before you begin entering data.

Indicators

TurboTax uses one-letter indicators in a box ([]) to obtain information that is necessary to prepare some aspect of your tax return.

- One type of indicator asks you to enter an “X” in a box if a particular situation is applicable.
- Another type of indicator asks you to enter a “Y” (for Yes) or an “N” (for No) in a box to answer a “Yes or No?” question.
- A third type of indicator is used to distinguish between the Taxpayer and the Spouse on a Married Filing Joint return.

A “T” in the box means the following information is for the Taxpayer. Enter an “S” in the box if you’re filing a joint return and you’re reporting information for the Spouse. The “T” or “S” indicator affects the calculation of your tax return and controls which name and Social Security Number are printed on the form.

The person whose name and Social Security Number are entered on the left side of the Personal Information Worksheet is the Taxpayer. Spouse information is entered to the right of the Taxpayer information on the Personal Information Worksheet. TurboTax lists the Taxpayer’s name and Social Security Number on Form 1040 or Form 1040A before the Spouse’s name and Social Security Number. If you and your spouse filed a joint return last year, you should continue to file with your names and Social Security Numbers in the same order to match the IRS’s records.

Codes

TurboTax uses special codes in complex areas like the Depreciation and Amortization Worksheet and the Passive Activity Worksheets to control the flow of information in your return. TurboTax generates these codes automatically so you don’t need to be concerned about them, but they can help you understand the program’s calculations and the flow of data among the forms.

Comment Lines

On some of the tax forms and schedules, you’ll notice an arrow type symbol (>) on the left side of the screen. Lines that start with these symbols are known as *comment lines*. *Comment lines* appear on the screen but they are not printed since they are not on the IRS forms. *Comment lines* give you instructions, ask you for information, and receive information from other forms.

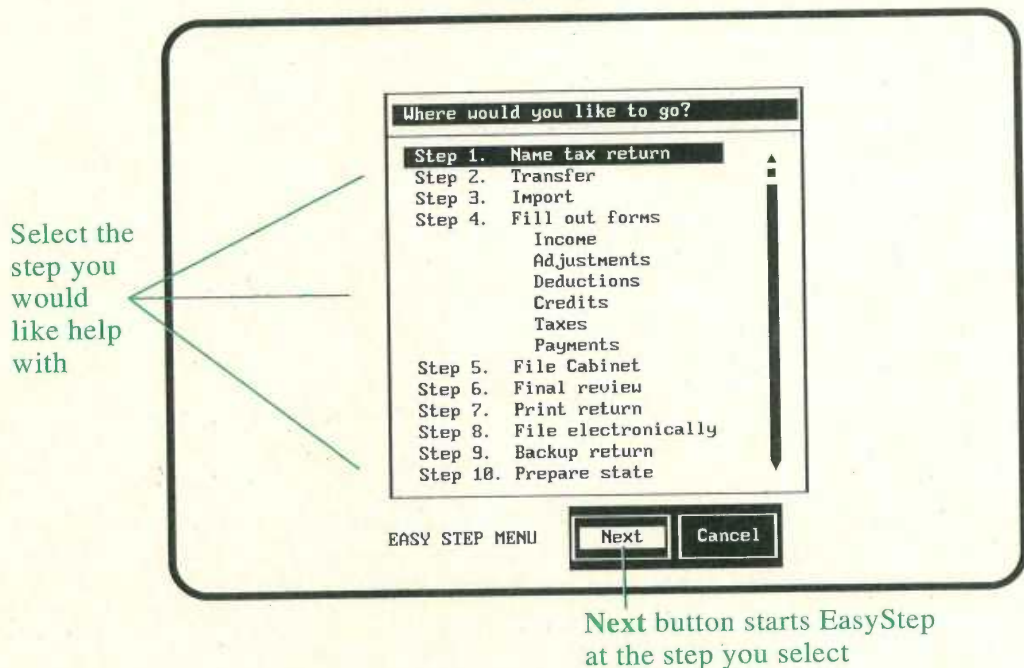
Using the EasyStep System

You can take advantage of the EasyStep system whenever you want, even though you're using the Classic approach. The first three commands on the **Help Menu** enable you to switch to the EasyStep system. Although EasyStep is self-explanatory, you can refer to Chapter 3 for additional information.

When you want to return to the Classic approach from the EasyStep system, select the **Stop** button, then select the **GotoForm** button from the screen that is displayed when you select **Stop**.

- The **Goto EasyStep** command displays the **EasyStep Menu** that lists the 10 Easy Steps. Select the step you would like help with. EasyStep will start at that place. Step 4, **Fill out forms**, is divided into six categories. When you select a category from the **Fill out forms** section, TurboTax lists the topics within that category.

EasyStep Menu



- The **Continue EasyStep** command returns you to the EasyStep system at the place you last used it. *This command doesn't appear on the menu if you haven't used EasyStep yet.*
- The **Tax help for this line** command displays the EasyStep help for the current data field. After reading the EasyStep information, enter the applicable data (if any), then press the **Enter** key or select the **Next** button. The EasyStep window and buttons will disappear.

These three commands can be selected quickly with speed keys.

Press the **F1** function key to select **Goto EasyStep**.

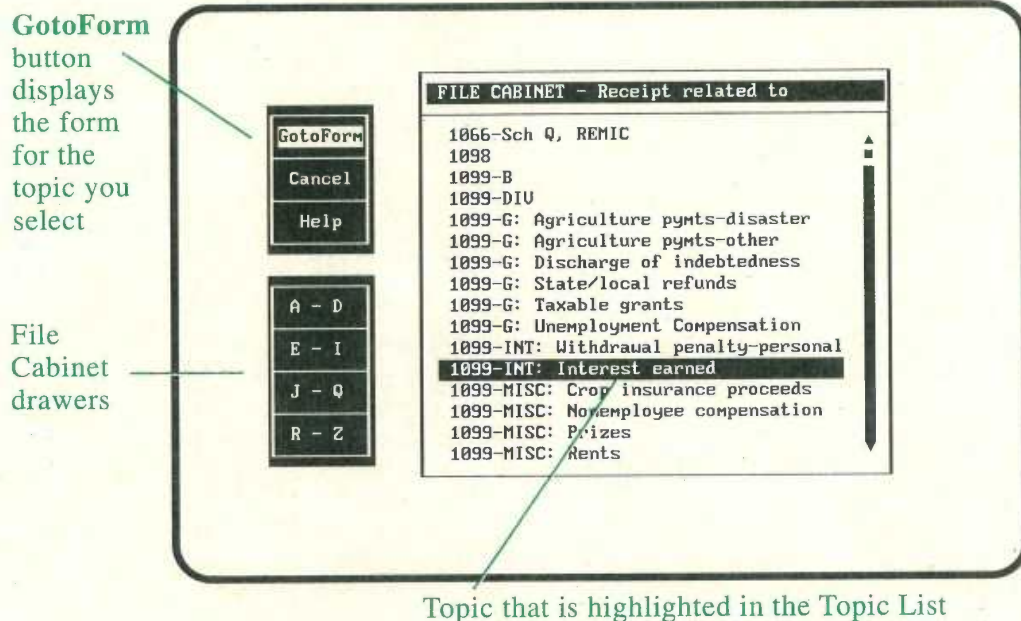
Press the **Alt** and **E** keys to select **Continue EasyStep**.

Press the **Alt** and **F1** keys to select **Tax help for this line**.

Step 5 - File Cabinet

The **File Cabinet** finds and displays the appropriate form and line for specific income, payment, expense, deduction, credit and tax information. You might want to use the **File Cabinet** to enter information on the forms, schedules and worksheets that you're not familiar with. You also might want to use the **File Cabinet** to make sure you've addressed all the areas of information that apply to your tax situation.

The File Cabinet



When you select **File Cabinet**, TurboTax displays a 4-drawer file cabinet on the left side of the screen together with a **GotoForm** button, a **Help** button and a **Cancel** button. The Topic List window is displayed to the right of the File Cabinet and the buttons. The topics in this window are listed alphabetically.

You can use the **Up** arrow, **Down** arrow, **PageUp**, **PageDown**, **Home** and **End** keys or your mouse to see the entire list of topics. You can also use the file cabinet drawers to jump to different parts of the Topic List. The top drawer takes you to the start of the "A" entries in the list, the second drawer takes you to the start of the

“D” entries, the third drawer to the start of the “J” entries, and the bottom drawer to the start of the “R” entries. Press **Alt-A**, **Alt-E**, **Alt-J** or **Alt-R** to select a drawer, or place the mouse pointer on the drawer and click the **Left Button** on your mouse.

To use the **File Cabinet**:

1. Select the **Menu** button to display the **Main Menu**.
2. Select **Prepare return** from the **Main Menu**.
3. Select **File Cabinet** from the **Prepare Return Menu**.
4. Move the highlight bar to the appropriate topic in the list, using the arrow keys or your mouse.
5. Select the **GotoForm** button.
6. Follow the EasyStep instructions in the information window to enter the data on the form, schedule or worksheet.
7. Select the **Stop** button to return to the **File Cabinet**.
8. Select the next topic from the drawer.
9. Select the **Done** button when you finish using the **File Cabinet**.

Quitting TurboTax and Saving Your Data

As you enter or change the data for your tax return, press the **Alt** and **S** keys periodically to save the information you've entered thus far. Frequent use of the **Save tax return** command can prevent a loss of data in the event of a power outage or equipment failure.

If you're using the Classic approach, you can quit TurboTax at any time by pressing the **Alt** and **X** keys. If you're in the EasyStep system, select the **Stop** button, then the **Exit TurboTax** button. If you've entered data that hasn't been saved, TurboTax will ask you if you want to save your tax return.

When you want to resume working on your tax return, start TurboTax according to the instructions in Chapter 2. If you've started and saved more than one return, the **TurboTax Tax Returns** window that lists the name of each return will be displayed. Highlight the name of the return you want to work on, then press the **Enter** key.

If you were using the Classic approach when you last quit the program, TurboTax will display the Personal Information Worksheet. If you were using the EasyStep approach, EasyStep will start at the exact place you stopped it.

Chapter 5 Reviewing Your Return

When you feel your tax return is complete, submit it to the TurboTax **Final Review**. **Final review** is Step 6 of the EasyStep system and Step 6 on the **Prepare Return Menu**. If you're using EasyStep, TurboTax runs **Final Review** when you finish filling out the forms. If you're using the Classic approach, do the following:

1. Select the **Menu** button to display the **Main Menu**
2. Select **Prepare return** from the **Main Menu**
3. Select **Final review** from the **Prepare Return Menu**

TurboTax will display the **Final Review** window. The situations being reported are grouped according to the **Final Review** categories. Most situations indicate the name of the relevant tax form and the affected line on that form. If more than one item is listed in the window, use the **Topic**> and <**Topic** buttons to move the highlight among the items. Select the **ChangeIt** button to go to the indicated data field so you can evaluate the situation. The EasyStep system will provide guidance. After you've corrected the

Final Review window

This is the situation you should review

This shows what's in the data field right now

Select the **ChangeIt** button to go to the form

* Form 8829: Enter a code of 1 thru 4 in the comment line at the top of this form to indicate to which copy of Schedule C you want the allowable business expenses to flow.

Schedule C Code

current value is _

Next	Previous	ChangeIt	Done
Topic ▶	◀ Topic	Help	Print

situation or decided it does not require any action, select the **Next** button to return to the **Final Review** window. You can proceed through all the **Final Review** situations this way, although some might not be linked to a specific data field. If you want to print the **Final Review** information for your return, select the **Print** button.

CAUTION: The Final Review cannot guarantee your return is complete. You are responsible for entering all information required by the IRS!

Final Review Categories

Data Examiner

Data examiner checks your return for the omission of required information and for contradictory information. A message with an asterisk (*) indicates a critical error which must be corrected. Your specific tax situation will determine whether a message without an asterisk (*) requires action on your part.

Tax Savings Suggestions

Tax savings suggestions suggests ways you might be able to reduce your tax liability, based on the information in your return.

IRS Audit Flags

IRS audit flags checks your return for factors that might provoke IRS scrutiny, then points out the areas you might want to examine.

U.S. Averages

U.S. averages compares the itemized deductions in your return against the most recently available national average for certain categories of itemized deductions, then displays the categories for which your deductions exceed those national averages. The averages are organized according to Adjusted Gross Income ranges.

List Overrides, Statements and Notes

List overrides, statements and notes identifies all the **OVERRIDDEN** fields, **Itemized statements** and **Reminder notes** in your return. Make sure the amount in each **OVERRIDDEN** field is correct and not an estimated amount. Make sure you include the applicable **Itemized statements** with the tax return you submit to the IRS. Check each **Reminder note** to make sure you've done everything you made a note to yourself to do.

Chapter 6

Printing Your Return

The first few pages of this chapter explain the IRS requirements for the printed copy of your tax return. Be sure to read these pages. The remainder of the chapter covers printer setup, printing your return, and troubleshooting printing problems.

Your Printed Tax Return and the IRS

TurboTax prints all the forms, schedules and worksheets in what the IRS defines as “computer-generated substitute format”. This means your printer produces them entirely in the same typeface and without any graphic representation.

The IRS accepts all the substitute format forms produced by the Final Edition of TurboTax, except Form 8453. The IRS will not accept any forms that are produced by the HeadStart Edition.

The Final Edition of TurboTax can print your Form 1040 or Form 1040A in graphic format, also. A graphic format Form 1040 or Form 1040A closely resembles the IRS Form 1040 or Form 1040A because it involves different typefaces and graphic representation. Printing a graphic format Form 1040 or Form 1040A requires a dot matrix with 120 dots per inch graphics capability, or a Hewlett Packard LaserJet Series II or Series III laser printer, or a laser printer that is 100% compatible with those laser printers.

The IRS accepts the graphic format Form 1040 and graphic format Form 1040A produced by the Final Edition of TurboTax.

TurboTax does not print Form 1040EZ in graphic format. Also, early model Hewlett Packard LaserJet printers will not print a graphic format Form 1040 or Form 1040A because TurboTax cannot download the necessary fonts to those printers.

The **Graphic 1040/1040A** command on the **Printer Setup Menu** that's discussed later in this chapter determines whether TurboTax prints your Form 1040 or Form 1040A in graphic format or substitute format. Both of these formats are approved for filing by the IRS. The substitute format is printed more quickly, but the graphic format looks more like the official IRS form.

IRS Requirements for Your Printed Tax Return

TurboTax takes care of the majority of the IRS rules concerning computer-prepared tax returns. However, you must observe the following rules when you print the IRS copy of your return.

- The paper on which the return is printed should be at least 18 lb. (Most good quality computer paper is 18 lb. paper).
- The paper should be white (or substantially duplicate the color of the original form) and must be printed in black ink.
- The page size should be 8" x 11" or 8.5" x 11".
- All forms must be clearly legible.
- Margins of at least 1/4 inch must be maintained across the top, bottom and both sides of all computer-generated forms, not including marginal strips containing pin-feed holes. (Centering the printed forms on each sheet of paper will satisfy these requirements.)
- Original forms should be filed, not photocopies.

Two other IRS rules apply to **Substitute Format Forms**.

- Vertical spacing should be 6 lines to the inch and horizontal spacing should be 10 characters to the inch. (Most printers automatically operate in this mode when turned on.)
- All text and numeric data fields must have printer underlining.

The IRS accepts substitute format forms printed by TurboTax on unlined paper as long as all the text and numeric data fields have printer underlining. If you use the **Select Printer** command on the **Printer Setup Menu** to identify your printer, TurboTax can control your printer so it underlines the text and numeric data fields.

TurboTax prints a graphic format Form 1040 or Form 1040A at approximately 8 lines per vertical inch, with a varying number of characters per horizontal inch and without underlining the data fields. The main IRS requirement for a graphic format form is that it be legible, so don't be concerned if the margins are more than 1/4 inch.

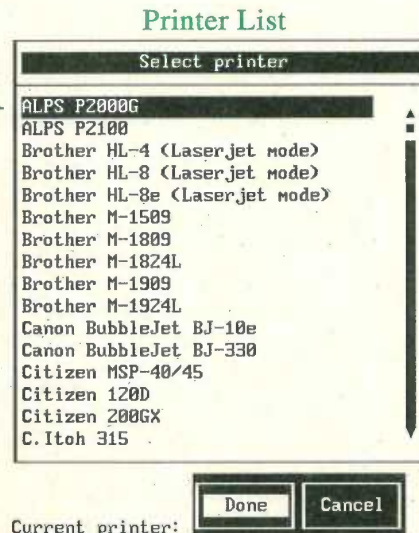
Printer Setup

Before you print your tax return, TurboTax must be set up for your printer to ensure the IRS requirements are met. If you're using EasyStep, the program guides you through this procedure. If you're using the Classic approach, follow the instructions below.

When you first start TurboTax, the program is set up for an Epson FX-86e dot matrix printer. Use the **Select Printer** command on the **Printer Setup Menu** to tell the program the make and model of your printer. This is usually all that's necessary to set up TurboTax for your printer. If **AutoSave options** on the **Program Options Menu** (that's accessed by the **Program options** command on the **Edit Menu**) is set ON, you won't have to select your printer again.

1. Press the **Menu** button to display the **Main Menu**.
2. Select **Files** from the **Main Menu** to display the **Files Menu**.
3. Select **Printer Setup** from the **Files Menu** to display the **Printer Setup Menu**.
4. Select **Select Printer** from the **Printer Setup Menu** to display the **Printer List**. The **Printer List** window lists several dozen printers alphabetically by manufacturer.

This printer is highlighted on the Printer List at the moment



TurboTax is set up for this printer

Current printer:
Epson FX-86e

5. Move the highlight on to the make and model of your printer, using the arrow keys, the **PageUp** and **PageDown** keys, or mouse. If your make and model of printer is not on the **Printer List**, select the printer that most closely resembles your printer. If necessary, refer to your printer manual for information on setting up your printer so it emulates a printer that is on the list. Refer to *Printer Setup Menu* later in this chapter for more information.

Note

You can call our Technical Support department for assistance with printer setup. The Intellisystem, which is available 24 hours a day if you're using a touch tone phone, has recorded instructions on setting up various printers so they will print your tax return properly.

6. Press the **Enter** key or click the **Left Button** on your mouse after the highlight is on the name of your printer. You'll notice the printer you selected is now identified as the "Current Printer" at the bottom of the screen.
7. Use the arrow keys or your mouse to move the highlight to **Select copies to print** if you want TurboTax to print more than 1 copy of your tax return. Press the **Enter** key, then enter the number of copies you desire.
8. Use the arrow keys or your mouse to move the highlight to **Graphic 1040/1040A** if you want TurboTax to print your Form 1040 or Form 1040A in graphic format instead of substitute format, then press the **Enter** key or the **Left Button** on your mouse to make an 'X' appear in the box.

To print a graphic format Form 1040 or Form 1040A requires a dot matrix or ink jet printer with 120 dots per inch graphics capability, or a Hewlett Packard LaserJet Series II or Series III laser printer, or a laser printer that is 100% compatible with those laser printers.

9. Make sure there is an 'X' in the **Include itemize stmts** box.
10. Press the **Escape** key to remove the **Printer Setup Menu** from the screen.

You should also do the following before you print your return.

- Place good quality, blank white computer paper in your printer.
- Align the paper to the top of the page.
- Make sure the power to the printer is ON.
- Make sure the printer is ON-LINE.
- Make sure your printer's ribbon or cartridge is producing easily readable black type.

Printing Your Tax Return

If you're using the EasyStep system, when it's time to print your tax return TurboTax guides you through the procedure. If you're using the Classic approach, select the **Print return** (Step 7) from the **Prepare Return Menu** or follow the instructions below.

1. Make sure you've readied TurboTax for your printer.
2. Press the **Menu** button to display the **Main Menu**.
3. Select **Files** from the **Main Menu** to display the **Files Menu**.
4. Select **Print** from the **Files Menu** to display the **Print Menu**.
5. Select **Tax return (for IRS)** from the **Print Menu** if you want TurboTax to print only the forms and schedules in your tax return that should be submitted to the IRS.

Select **Tax return & worksheets** from the **Print Menu** if you want TurboTax to print all the forms, schedules and worksheets in your tax return that have information, including those that do not need to be filed with the IRS.

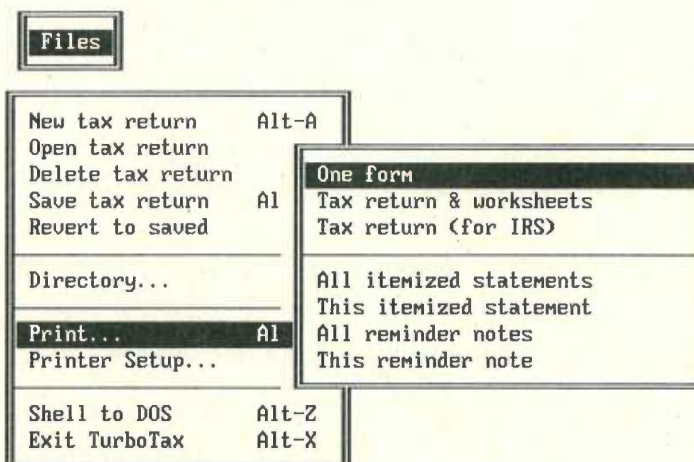
6. Select **One form** from the **Print Menu** to display the **Print Selection Menu**, then use that menu if you want TurboTax to print any additional forms, schedules or worksheets.

Check your tax return to make sure there is a blank area of at least 1/4 inch at the top, bottom and both sides of each printed form. If there isn't, reposition the paper in the printer accordingly, then print your tax return again.

Check the substitute format forms to make sure the text and numeric data fields have printer underlining. If you've printed a graphic format Form 1040 or Form 1040A, examine the form to make sure it resembles an IRS Form 1040 or Form 1040A. If your printer hasn't underlined the data fields or if you are not satisfied with your graphic format Form 1040 or Form 1040A, see *Potential Printing Problems and Solutions* later in this chapter.

The Print Menu

The Print command on the Files Menu displays the Print Menu



One form

One form displays the **Print Selection Menu**, which lists all the forms, schedules and worksheets in TurboTax. To print a particular form, schedule or worksheet, select it from the **Print Selection Menu** the way you select a form for display from the **Form Selection Menu**. The form will be printed in substitute format. If you select Form 1040 or Form 1040A and **Graphic 1040/1040A** on the **Printer Setup Menu** is set to ON, the form is printed in graphic format instead of substitute format (if you're using a printer with graphic capability). If **Include itemize stmts** is ON, itemized statements for that form are printed on a separate page.

Tax return & worksheets

Tax return & worksheets prints all the forms, schedules and worksheets that contain information. The forms and schedules are printed in IRS attachment sequence order, then the worksheets are printed. The supporting forms, schedules and worksheets are printed in substitute format. If **Graphic 1040/1040A** on the **Printer Setup Menu** is ON, your Form 1040 or Form 1040A is printed in graphic format instead of substitute format (if your printer has graphic capability). If **Include itemize stmts** on the **Printer Setup Menu** is ON, itemized statements are printed on separate pages after the forms and schedules they support.

Tax return (for IRS)

Tax return (for IRS) is the same as the **Tax return & worksheets** command discussed above except worksheets that do not need to be filed with the IRS are not printed. The forms and schedules are printed in IRS attachment sequence order.

All itemized statements

This command prints all the itemized statements in your return. Since the statements are printed in the order they were created and not according to form, these copies are for your use only.

This itemized statement

This command prints a single itemized statement. Move the cursor to the **Itemized Statement** field before you select this command.

All reminder notes

This command prints all the reminder notes in your return in the order they were created.

This reminder note

This command prints a single reminder note. Move the cursor to the line with a triangle before you choose this command.

Potential Printing Problems and Solutions

You shouldn't have any problem printing your tax return if you use the **Select Printer** command on the **Printer Setup Menu**, especially if your make and model of printer is on the **Printer List**. However, if you do encounter a problem because of the large variety of printers available and differences in operating standards, refer to your printer manual for information about its operation.

If you have a problem obtaining proper printer output:

- Use the **Select Printer** command on the **Printer Setup Menu** to select your printer from the **Printer List**.
- Make sure the printer is ON-LINE.
- Make sure the printer is in Draft Mode and set for 10 characters per inch. Most printers are set at these values when turned on.
- Check the printer dip switches (if any). Make sure they are at the default settings shown in the printer manual.
- Check the printer cable connections.
- If the printer is not printing at all, press the **Print Scrn** key to see if you can obtain a Print Screen. Also try printing with other programs.
- Check the screen for messages. If you see any of the messages listed later in this section, try the recommended steps.
- Try selecting a different printer from the **Printer List**. Your printer manual may have information about printers that your printer can emulate.
- Turn the printer power switch OFF, then turn it back ON.

If your printer has not underlined the data fields on the substitute format forms:

- Check your printer manual for the underlining on and underlining off control codes for your printer, then use the **Edit printer codes** command on the **Printer Setup Menu** to edit the **Underlining On** and **Underlining Off** values, if necessary.

If your graphic format Form 1040 or Form 1040A does not seem correct and you're using a dot matrix or ink jet printer:

- Make sure your printer has 120 dots per inch graphics capability.
- If the form is not centered on the page, use the **Left margin adjustment** command on the **Printer Setup Menu** to change the left and right margins.
- Use the **Edit printer codes** command on the **Printer Setup Menu** to edit the printer control codes based on the information in your printer manual.
- Turn the power to the printer OFF, then turn it back ON.

If your graphic format Form 1040 or Form 1040A does not seem correct and you're using a laser printer:

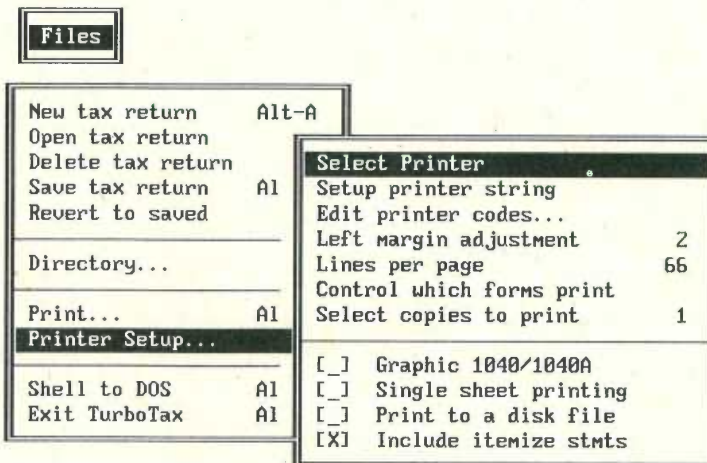
- Make sure you're using a Hewlett Packard LaserJet Series II or Series III printer, or a laser printer that's 100% compatible with those Hewlett Packard laser printers.
- Remove any font cartridges or downloaded fonts if you're using a Series II or Series III Laser Printer.
- Reinstall TurboTax to make sure the laser files are in your TurboTax directory.
- Check your printer's control panel and make sure the settings are at their default values.
- Turn the power to the printer OFF, then turn it back ON.

If you are still unable to print your tax return with your printer, try using a different printer to prepare the IRS copy of your tax return. If that isn't possible, copy your tax return data onto IRS forms and schedules by hand, or contact the ChipSoft Technical Support staff for assistance as explained in Chapter 10. If you call from a touch tone phone, you can access the Intellisystem of recorded Technical Support information 24 hours a day, 7 days a week. Select "Installation/Printer", then "Specific Printer Setup Information".

Be prepared to use the telephone keys to enter the first three letters of the manufacturer of your printer. For example, enter **7 2 6** for Panasonic. Enter a "1" for the letters Q and Z. Do not use abbreviations. In most cases you'll be asked to enter the first three digits of the model number. If there are less than three digits in the model number, enter "0" (zero) for each remaining digit.

Printer Setup Menu

Printer Setup displays the Printer Setup Menu



Select Printer

Earlier in this chapter, we explained how you use the **Select Printer** command to set up TurboTax for your printer. In most cases, that is all that is necessary. If it's not, this section explains:

- how to enter printer control codes if the **Printer List** doesn't include your printer or a similar printer
- how to utilize some of TurboTax's optional printing features

Setup printer string

If you can't use the **Select Printer** command and your printer requires a printer setup string to meet the IRS requirement that computer-generated substitute format forms be printed at 10 characters per horizontal inch and 6 lines per vertical inch, use the **Setup printer string** command. This command also controls the number of print lines per page for a laser printer. Your printer manual contains the codes that control your printer. Enter the decimal representation of each individual control code. If you want TurboTax to enter a setup string for you, use the **Select Printer** command to select a printer from the list.

Edit printer codes

If you can't use the **Select Printer** command and your printer requires printer control code sequences to print your tax return properly, use the **Edit printer codes** command to display the **Printer Codes Menu**. **Underlining On** and **Underlining Off** affect the underlining of data fields on forms when they are printed

in substitute format. **Double Density, Paper Feed n/216, Paper Feed n/72, Paper Feed 1/6, Initialize Graphics and Vertical Adjust** affect the printing of Form 1040 and Form 1040A in graphic format. The control code sequences for your printer are contained in your printer manual. Enter the decimal representation of each separate control code. Valid entries are 0 - 255 except for 24. If you want TurboTax to enter a control code sequence for you, use the **Select Printer** command.

Left margin adjustment

If your printer does not allow for horizontal adjustment of the paper, you can use the **Left margin adjustment** to change the horizontal positioning of Form 1040 or Form 1040A in graphic format. The initial value of 2 means two spaces are skipped prior to printing information on a line. Enter "0" or "1" to shift this starting point to the left. Enter "3" to "10" to shift it to the right.

Lines per page

Lines per page determines how many lines are printed on each page. The initial value of 66 is normally correct for the printing of your tax return on standard letter-size sheets of paper. TurboTax sets **Lines per page** to 0 when you select a Hewlett Packard laser printer from the **Printer List**. Page length is controlled by the laser printer.

Control which forms print

This command can be used to control which forms are printed when you select the **Tax return & worksheets** or **Tax return (for IRS)** command on the **Print Menu**. **Control which forms print** displays a menu that lists all the forms, schedules and worksheets. The ♦ to the left of each form indicates it will be printed if it contains information.

To force the printing of a form, move the highlight bar to it, then select the **Always** button so a plus sign (+) appears beside it. To prevent the printing of a form, move the highlight bar to it, then select the **Never** button so a minus sign (-) appears beside it. When you are satisfied with the changes you've made, select the **Done** button. If you use this feature, be sure the tax return you submit to the IRS contains all the necessary forms and schedules.

Select copies to print

Select copies to print controls how many copies of your tax return are printed when you choose the **Tax return & worksheets** or **Tax return (for IRS)** command on the **Print Menu**.

Graphic 1040/1040A

When **Graphic 1040/1040A** is set ON, your Form 1040 or Form 1040A is printed in graphic representation if your printer has graphic capability. When **Graphic 1040/1040A** is set OFF, your Form 1040 or Form 1040A is printed in substitute format. (**Graphic 1040/1040A** is available in the Final Edition only.)

Single sheet printing

If your printer doesn't use continuous feed paper (and it's not a laser printer), choose **Single sheet printing** to set this option ON. The program will wait for you to insert another sheet of paper after each page is printed.

Print to a disk file

If you want to print at a later date (perhaps on a different printer) and you have a hard disk, use **Print to a disk file** to direct the "printed" output to a file. TurboTax will ask you for a drive, path and filename so it can create a file to receive the information. The next time you choose a print command, the program will send the output to a file it creates. Later you can use the DOS Print command to send the contents of that file to a printer. If the file is named FORM1040.TAX, the DOS command would be:

PRINT FORM1040.TAX

If you use this feature to print a graphic format Form 1040 or Form 1040A on a laser printer, use the **Select Printer** command on the **Printer Options Menu** to select the laser printer before you use the **Print to a disk file** command. Also be sure to turn the **Graphic 1040/1040A** command to ON. Before you use the DOS Print command to print the graphic form on the laser printer, you must download the soft fonts that are included with TurboTax. The DOS command for this procedure is:

COPY TTAX.FON PRN /B

If you're using the computer you prepared your tax return on, issue this command from your TurboTax directory. If you're using a different computer, use the DOS Copy command to copy the TTAX.FON file to a disk together with the file with the graphic format Form 1040 or Form 1040A, then download the TTAX.FON file to the laser printer **before** you issue the DOS Print command.

To turn **Print to a disk file** OFF, select the command again so the "X" is removed from the box on the **Printer Options Menu**.

Include itemize stmts

If **Include itemize stmts** is ON when you choose **One form, Tax return & worksheets** or **Tax return (for IRS)** from the **Print Menu**, itemized statements are printed following the form or forms they support. Set **Include itemize stmts** to OFF only if you don't want your itemized statements to be printed.

Printing-Related Error Messages

Error 152

This message usually means the program is sending information to your printer faster than the printer can process it. First check your printer cable for loose pins or a loose connection. If that doesn't seem to be the problem, at the DOS prompt type:

MODE LPT1:.,,P	if a parallel connection
MODE COM1:9600,N,8,1,P	if a serial connection with DOS 2.x or 3.x
MODE COM1:9600,N,8,1,R	if a serial connection with DOS 4.x or 5.x

Fix printer - hit any key to continue or ESC to abort

Make sure the power is on and the printer is ON-LINE. Press any key to start printing, or press the **Escape** key to cancel the print command.

No paper error writing device PRN Abort, Retry, Ignore?

Your printer is out of paper. Load paper into the printer, then press **R** to Retry.

Printer Not Ready

The printer is not ready to print. Put the printer ON-LINE, then press any key to start printing.

Printer not ready Abort, Retry, Ignore

The printer is not ready to print. Ready the printer, then press **R** to start printing.

Write fault error writing device PRN

The program cannot communicate with your printer. Make sure the printer is ON, properly connected to your system, and ON-LINE. If you have a serial printer, you may have forgotten to enter the DOS Mode command before running TurboTax. Return to DOS and type:

MODE LPT1:=COM1

Chapter 7 Filing Your Tax Return

The first part of this chapter explains how to file your tax return with the IRS by mail. The second part explains how to use the TurboTax Personal SPEED>FILING Service to file your tax return with the IRS electronically. Remember you must use the Final Edition of TurboTax to prepare the IRS copy of your tax return.

Filing Your Tax Return by Mail

When you're ready to file your tax return with the IRS, look it over one last time. If you haven't used the **Final review** command, do so now. Be sure to keep a printed copy of your tax return for your records.

- Remove any tractor feed perforations from the margins of the paper and make sure your tax return meets the IRS requirements listed in Chapter 6.
- Sign and date your Form 1040, Form 1040A or Form 1040EZ. If your filing status is Married Filing Joint Return, your spouse also must sign and date your Form 1040 or Form 1040A.
- If you have an IRS-issued name and address label, place the label on the name and address portion of your Form 1040, Form 1040A or Form 1040EZ. Correct the information on the label, if necessary.
- If you owe the IRS, write a check or obtain a money order for the full amount and make it payable to "Internal Revenue Service". The check or money order must include your social security number, address, daytime phone number and either "1992 Form 1040", "1992 Form 1040A" or "1992 Form 1040EZ". Attach the check or money order to page 1 of your Form 1040, Form 1040A or Form 1040EZ.
- Attach Copy B of each Form W-2, Form W-2G and Form 1099-R that you received to page 1 of your Form 1040, Form 1040A or Form 1040EZ.
- If you are filing any itemized statements with your tax return, write "See statement X" on the appropriate line of the supported tax form, where "X" stands for the title of the itemized statement.

Assemble your tax return in the following order.

1. Form 1040, Form 1040A or Form 1040EZ is placed first.
2. Next, arrange the forms and schedules according to the IRS attachment sequence number that is printed in the upper right corner of each form following the year. For example, the **1992 * 08** that appears on Schedule B shows the attachment sequence number for Schedule B is **08**.
3. Itemized statements come next, in the same sequence as the forms they support. Each form should have a separate page for its itemized statements.
4. Any additional information you are submitting voluntarily should be placed last.

Note

The TurboTax commands that print your tax return print the forms and schedules in IRS attachment sequence order.

After everything is ready, place your tax return in an envelope. If you have an IRS-issued envelope, use it. Put the proper postage on the envelope, then mail it to the appropriate IRS Service Center.

Your tax return must be postmarked before midnight of April 15 for you to avoid a late filing penalty.

Filing Your Tax Return Electronically

If you have a **Refund** or **Zero-Balance** return that meets the various IRS requirements, you can use the TurboTax Personal SPEED>FILING Service to file your return electronically. (Electronic filing is not available if you have a **Balance-Due** return.) One advantage of electronic filing is that you'll receive your refund from the IRS three to six weeks sooner than if you file it by mail. Another advantage is that you can request the IRS to deposit your refund directly into a bank account.

Note

You must use the Final Edition of TurboTax for electronic filing.

You can use a Hayes-compatible modem and communications software to transmit the data file with your return to the TurboTax Personal SPEED>FILING Center, or you can mail a printed copy of your return to us. The IRS will accept electronic returns from January 15 through April 15, 1993 (or August 16, 1993 if you've filed an extension). We can't transmit your return to the IRS until it passes the electronic filing eligibility tests and we receive your completed Form 8453. Allow yourself enough time before April 15 (or August 16) to correct a problem, should that be necessary.

The **Final Review** procedure checks your return for many of the factors that will cause the IRS to disqualify your return from electronic filing. Check your return for the electronic filing disqualification factors that are listed at the end of this chapter before you send it to us because the program does not check for those factors. The TurboTax Personal SPEED>FILING Service checks for these conditions, but your refund will be delayed if you send us a return that doesn't qualify for electronic filing.

Attention Paid Preparers. You cannot use the TurboTax Personal SPEED>FILING Service. The IRS requires the inclusion of paid preparer information with each electronic return, and *TurboTax Personal 1040* does not provide data fields for paid preparer information. Contact our Professional Sales staff at (619) 453-6860 for information on the *TurboTax ProSeries/1040* program and the TurboTax Professional SPEED>FILING program.

Electronic Filing Procedure

The electronic filing procedure is summarized below. Step 8 of the EasyStep system and Step 8 on the **Prepare Return Menu**, both of which are named **File Electronically**, explain the electronic filing procedure. The **File Electronically** explanation in the Final Edition is more "up-to-date" than the information in this section.

1. Complete your tax return using TurboTax.
2. Make sure there's an **X** in the "Electronic Filing" box on page 2 of the Personal Information Worksheet.
3. Select **Final Review** from the **Prepare Return Menu** because it includes checks for electronic filing eligibility when there's an **X** in the "Electronic Filing" box on page 2 of the Personal Information Worksheet.
4. Check your return for the electronic filing disqualification factors listed at the end of this chapter.
5. If you or the **Final Review** identify any missing or erroneous information, make the necessary corrections (if possible), then run **Final Review** again.
6. Complete Form 8453 and the TurboTax Personal SPEED>FILING Electronic Order Form that is attached to Form 8453 in the program. If you want to have your refund deposited directly into your checking or savings account, complete Part II of Form 8453.

The following example, which involves a string of numbers from the bottom of a check, will help you identify the

Routing Transit Number (RTN) and Depositor Account Number (DAN) that must be entered on Form 8453.

I:122000496I:7312007092 1001

The RTN, which begins with 01-12 or 21-32, is the 9 numbers that appear between the "I:" characters. The RTN identifies your financial institution. In this example, the RTN is **122000496**. The second set of numbers in this example, **7312007092**, is the DAN. The last set of numbers, **1001**, is the check number, which you **must not** enter on Form 8453. These numbers may appear in a different order on your checks. If you have any questions, call your financial institution.

7. Transcribe the information from the Form 8453 that's in the program on to the preprinted copy of Form 8453 that's included in your TurboTax package.

If You are Using a Modem

1. Transmit your TurboTax data file to the TurboTax Personal SPEED>FILING Center. Refer to the README file in the Final Edition of the program for the available electronic mail addresses and more information on this procedure.

The first tax return you prepare is named TAXDATA1.92F. If you've prepared more than one tax return, the subsequent data files will be named TAXDATA2.92F, TAXDATA3.92F, TAXDATA4.92F and TAXDATA5.92F. These filenames correspond to the top-to-bottom listing of Tax Return Names in the TurboTax Tax Returns window when you select the **Open tax return** command from the **Files Menu**.

We'll convert your return into electronic filing format and perform additional checks for electronic filing eligibility.

2. Approximately 24 hours after transmitting your return, log into the service through which you transmitted your return and check for an electronic mail message from us. We'll leave you a message to inform you whether or not your return is ready for transmission to the IRS.

If we detected a problem with your return, the message will explain it. Correct the problem and re-transmit your return.

3. After you receive the electronic mail message indicating that your return passes the electronic filing eligibility tests, mail the following to :

TurboTax Personal SPEED>FILING Center
P.O. Box 59342
Minneapolis, MN 55459-0342

- A completed SPEED>FILING Electronic Order Form
- The completed preprinted copy of Form 8453. (Both the taxpayer and the spouse must sign and date the form when the filing status is Married Filing Joint.)
- Copy B of each Form W-2, Form W-2G and Form 1099-R
- Any other required documents
- The filing fee of \$19.95 per return
- Proof of account if you've elected to have your refund deposited directly to your bank account. This can be a check (or a photocopy of a check), or a form, report or statement generated by the financial institution that has preprinted on it the account name, account number, name of the financial institution or branch name, and the Routing Transit Number (RTN) of the financial institution.

If You are Not Using a Modem

Mail the following to:

TurboTax Personal SPEED>FILING Center
P.O. Box 59342
Minneapolis, MN 55459-0342

- A printed copy of your tax return with the appropriate signature(s). (Both the taxpayer and the spouse must sign and date a Married Filing Joint return.)
- A completed SPEED>FILING Electronic Order Form
- The completed preprinted copy of Form 8453. (Both the taxpayer and the spouse must sign and date the form when the filing status is Married Filing Joint.)
- Copy B of each Form W-2, Form W-2G and Form 1099-R
- Any other required documents
- The filing fee of \$19.95 per return
- Proof of account if you've elected to have your refund deposited directly to your bank account. This can be a check, a photocopy of a check, or a form, report or statement generated by the financial institution that has the account name, account number, name of the financial institution or branch name, and the Routing Transit Number (RTN) of the financial institution preprinted on it.

We'll convert your return into the IRS electronic filing format and perform additional checks for electronic filing eligibility. If we detect a problem with your return, we'll contact you so you can correct the problem and resubmit your return.

Final Procedures

When your return has passed all the eligibility tests and we've received your Form 8453, we'll transmit the file to the IRS. In a short period of time (usually 12 to 24 hours), the IRS sends an acknowledgement record to our SPEED>FILING Center indicating whether or not the return was accepted and the expected refund date. If your return is accepted, we'll mail you a postcard to indicate acceptance. Keep the postcard because it is your proof of filing your tax return. If your return is not accepted, a customer service representative will contact you to resolve the problem.

With our system, the chances of your return being rejected are slim, but if it is rejected, the IRS will typically notify us within 24 hours of receipt. If you have a modem, we'll contact you by electronic mail immediately. If you don't have a modem, we'll call you. We'll communicate the rejection reason so you can correct the problem and resubmit the return.

After the IRS accepts your return, they will mail you a check or deposit your refund in the bank account you identified in Part II of Form 8453.

Technical Support

If you have any questions about electronic filing, call the TurboTax Personal SPEED>FILING Center at (800) 532-5320, or contact our Technical Support staff as explained in Chapter 10.

Electronic Filing Eligibility Factors to Check

Check your return for the following factors to determine whether it is eligible for electronic filing.

- Use the same Primary taxpayer name and SSN that you used on your 1991 return. Do NOT switch the Primary and Spouse names. If your name has changed and you haven't notified the Social Security Administration, do so now. The Social Security Administration will notify the IRS of your name change in about 3 weeks, at which time you can submit or re-submit your return.
- Each itemized statement must contain at least two lines of information (not counting the title and reference lines).
- The number of itemized statements with the return must match the number of itemized statements referenced in the return.

Form	Data Entry Requirements	Disqualification Conditions
Personal Information Wks	"X" in Electronic Filing box. Valid 2-digit Postal Service State code; must correspond to first 3-digits of Zip Code.	Filing status of 3, Married Filing Separately, with no APO/FPO address and do not live in one of the following community property states (AZ, CA, ID, LA, NV, NM, TX, WA, WI).
W-2 Wks	All employer information. Wages amount (line 10). Employer ID Number (EIN) in valid format. Valid code if an Other taxes amount (line 17).	
1099 Wks	Payer Name and Payer ID Number.	
Form 1040A	Allowable attachments are: Schedules 1, 2, 3 Schedule EIC Forms W-2, W-2G, 1099-R	
Form 1040EZ	Allowable attachment is: Form W-2	
Form 1040	If filing status is 3, Married Filing Separately, the Spouse SSN must be a valid SSN, and not "NRA" or "Applied". Alimony Paid - enter more than one recipient using the Itemize button on line 29. Other Adjustments - enter more than one type using the Itemize button on the comment line above line 30. Other Taxes - enter more than one type using the Itemize button on line 53.	More than six dependents on line 6c. More than one type of Other Income on line 22. Unearned income for child under 14 on line 38. Foreign tax credit (Form 1116) on line 43. Earned income credit (Sch EIC) on line 56. OR any of these items selected: Line 38d (Tax from Form 8615). Line 38e (Tax from Form 8814) Line 39a (Add'l tax from Form 4970) Line 39b (Add'l tax from Form 4972) Line 44a (Credit from Form 3800) Line 44b (Credit from Form 8396) Line 44c (Credit from Form 8801) Line 44d (Other credits) Line 49b (Tax from Form 8611) Line 49c (Tax from Form 8828) Line 59a (Payments from Form 2439)
Schedule A	Enter information for lines 7, 19, 20 and 25 on the Schedule A worksheets, not on Schedule A. To enter more items than will fit on a worksheet, start on the 2nd detail line, then use the Itemize button on the 1st detail line to make a list.	
Schedule B	Enter only regular interest and dividend income on Schedule B. To enter more items than will fit on Schedule B, lines 1-5, start on the 2nd detail line, then use the Itemize button on the 1st detail line to make a list. Enter other types of interest and dividend income (e.g., nontaxable interest) on the Interest Income Worksheet or Dividend Income Worksheet.	Excludable savings bond interest on line 3. More interest income or dividend income items than will fit on the Interest Income Worksheet or the Dividend Income Worksheet.

Electronic Filing Eligibility Factors

Form	Data Entry Requirements	Disqualification Conditions
Schedule C	To enter more than four "Other Expenses" on line 27a, start on the 2nd detail line, then use the Itemize button on the 1st detail line to make a list.	Line G - method used to value closing inventory is "3-Other".
Schedule D	To enter more than one Schedule C, D, E, or F bartering transaction, use the Itemize button on the line 50 amount field. To enter more than one "Other form or schedule" bartering transaction, use the Itemize button on the line 51 amount field.	Amounts on lines 1b, column d (Sales price), column f (LOSS) or column g (GAIN). Amounts on lines 9b, column d (Sales price), column f (LOSS) or column g (GAIN).
Schedule E	To enter more than five sources of income from Partnerships or S-Corporations, use Schedule E-2 Extra.	Income from more than three estates or trusts on line 32. Income from more than one Real Estate Mortgage Investment Conduit (REMIC).
Schedule EIC		Entry on line 2 or line 3.
Schedule F	To enter more than one "Other Expenses" on line 34a, start on lines 34b, 34c and 34f, then use the Itemize button on line 34a to make a list.	Conservation expense on line 14.
Form 2210		Underpayment amount on line 28, column d.
Form 4255		Tax amount on line 13.
Form 4562	Enter depreciation and amortization information on the Depreciation and Amortization Worksheet first. Enter "Business Use" as 2-digit or 3-digit whole percentages, (e.g., 100 for 100%).	
Form 4684		Any Itemizations
Form 4797		Any Itemizations
Form 5329		Amended Return box on line 1 is checked.
Form 6198	To enter more than one "Other form or schedule", use the Itemize button on line 2c to make a list.	
Form 8283	The name and address of the donee organization must be separated by a "less than" symbol, (e.g., Ranger Hockey Foundation <17965 Carley Circle).	Any Itemizations Section B, line 1, "Art \$20,000 or more" box checked.

Chapter 8 After Filing Your Return

After you've filed your tax return with the IRS, you can use TurboTax to make a back-up copy of your tax return data file, prepare your state tax return (if you've purchased a TurboTax State program), and perform 1993 tax planning. **Backup return** and **Prepare state** are Steps 9 and 10 of the EasyStep system. EasyStep guides you through these procedures. Tax planning for 1993 is not a part of the EasyStep system. Steps 9, 10 and 11 on the **Prepare Return Menu** are **Backup return**, **Prepare state** and **Tax planning**.

Backing Up Your Tax Return Data File

After you complete your tax return, it's wise to make a backup copy of the data file with your tax return information. Select the **Prepare return** command from the **Main Menu**, then select **Backup return** from the **Prepare Return Menu**. When "Drive\directory to back up files to" appears, type the path for the drive and directory to which you want TurboTax to copy your tax return data file.

Note

TurboTax assigns the filename TAXDATA1.92F to the first tax return it creates, TAXDATA2.92F to the second, etc. up to TAXDATA5.92F to the fifth tax return created. If you've prepared just one tax return, that data file is named TAXDATA1.92F. Each data file also has a file that keeps track of various factors related to the EasyStep system. These files are named HISTORY1 through HISTORY5. **Backup return** copies the HISTORY file along with the corresponding TAXDATA file.

Preparing a State Tax Return

You might need to file a state tax return with the state in which you live and/or the state in which you work. You'll want to use the information in your federal tax return as the basis for preparing your state tax return (or returns).

TurboTax State Programs

The easiest way to prepare your state tax return is to use a TurboTax state tax return program (sold separately). Since the

state programs operate like the federal program, you already know how to use them. What's more, if you must file two state tax returns, you can use two state programs along with your federal data file as easily as you use one.

Our state programs read information from your TurboTax federal data file and transfer it into your state tax return automatically. In addition, the state tax programs carry out the tax form calculations for you and they provide information and assistance. If you don't have the state program you need and you haven't ordered it yet, refer to the Personal Product Sales section of Chapter 10 and the Order Form at the end of this manual for more information.

1993 Tax Planning

TurboTax can help you with your 1993 tax return in several ways.

Calculate the Correct Amount of Withholding

You can use Form W-4 and its supporting worksheets to calculate the amount of federal income tax your employer should withhold from your pay. The Form W-4 in the HeadStart Edition calculates withholding for 1992, while the Form W-4 in the Final Edition calculates withholding for 1993. Using Form W-4 is particularly important if you owed the IRS a large amount with your last tax return or you overpaid the IRS by a significant amount.

As you examine Form W-4, enter any necessary information and, if you think a number that TurboTax transferred from your tax return to Form W-4 will be different for 1993, use the **Override** button to correct it. When you are satisfied with the information on Form W-4, print it and use this information to fill in an official Form W-4 for your employer.

Do not use Form W-4 when TurboTax is in the **1993 Plan Mode** that is discussed later in this chapter.

Compute Estimated Tax Payments for 1993

You can use the Form 1040-ES Estimated Tax Worksheet to calculate the amount of each estimated tax payment required by the IRS and avoid a penalty for underpayment of estimated tax next year. Using the Estimated Tax Worksheet is particularly important if you owed an underpayment of estimated tax penalty this year or if you have self-employment income.

As you examine the Form 1040-ES Estimated Tax Worksheet, enter any necessary information and, if you think a number that

TurboTax transferred from your tax return to the worksheet will be different for 1993, use the **Override** button to correct it. When you are satisfied with the information on the Form 1040-ES Estimated Tax Worksheet, use it as the basis for the estimated tax payments you make on the Form 1040-ES payment vouchers you obtain from the IRS.

Do not use the Form 1040-ES Estimated Tax Worksheet when TurboTax is in the **1993 Plan Mode** that is discussed later in this chapter.

Perform 1993 Tax Planning

If you want to get a general idea of your 1993 tax liability quickly, select the **Prepare return** command from the **Main Menu**, then select **Tax planning** from the **Prepare Return Menu**. TurboTax will display the **1993 Tax Planning Menu**.

1993 Tax Planning Menu

You use the **1993 Tax Planning Menu** to turn the **1993 Plan Mode** ON and OFF and to change the value of the 1993 tax planning options. When the **1993 Plan Mode** option is OFF, the program uses 1992 tax rates and 1992 tax regulations for all computations.

The 1993 Plan Mode must be OFF when you prepare your 1992 tax return.

- **Use next year rates** turns the **1993 Plan Mode** option ON and OFF.

Note

When the **1993 Plan Mode** is ON, “[X]” precedes the **Use next year rates** command on the menu and “Plan” is displayed at the bottom of the screen. When the **1993 Plan Mode** is OFF, “[]” precedes the command on the menu.

- **Cost of living increase** is a percentage the program uses to adjust the 1992 tax brackets and other factors for 1993.
- **Auto/Inflation index** is a percentage the program uses to calculate the maximum depreciation deduction that can be claimed for a listed property automobile in 1993.
- **Exemption index** is a percentage the program uses to calculate the personal exemption amount for 1993.

- **High income phaseout** is a percentage the program uses to limit the itemized deductions and personal exemption amount for high income taxpayers for 1993.
- **EIC Index** is a percentage the program uses to adjust the brackets for the Earned Income Credit.

When you turn the **1993 Plan Mode** option ON, "PLAN" is displayed near the bottom of the screen and TurboTax uses 1993 tax rates and many 1993 tax regulations. Note that the **Cost of living increase, Auto/Inflation index, Exemption index, High income phaseout** and **EIC Index** values in the HeadStart Edition may be estimates pending the release of the government figures.

This approach gives you only a rough approximation of your 1993 tax return because it's unlikely your income, deductions and other factors will be the exactly the same next year as this year. This approach also does not update information like depreciation, passive activity losses, capital losses, etc. that carry over from your 1992 return to your 1993 return.

Next Year Command

The **Next year** command on the **1993 Tax Planning Menu** allows you to perform 1993 tax planning more thoroughly. **Next year** places 1992 carryover information on the lines that are appropriate for next year. **Next year** also updates the calculations on the Depreciation and Amortization Worksheet for 1993. Whether or not all other numeric data is erased from the forms and supporting statements depends on your response to the "Erase numeric data?" question. Text information is not erased, regardless of your answer to the "Erase numeric data?" question. In addition to preparing your data file for 1993 tax planning, **Next year** places TurboTax in **1993 Plan Mode** automatically.

Note

The **Next Year** command is not active in the HeadStart Edition.

Since the **Next year** command modifies the information in your data file, make a copy of the data file with your tax return before you use **Next year**. You'll want to have one data file with your 1992 tax return and a second data file with your 1993 tax planning information. Be sure to keep these two files on separate disks or in separate directories because they will have the same name.

After the **Next year** procedure is finished, you can enter estimated 1993 tax information onto the forms and worksheets to get an idea of your 1993 tax situation. You also can enter 1993 tax information throughout the year as you receive it.

The next section explains how you can use TurboTax to analyze your tax situation and perhaps reduce your tax liability.

Analyze Different Tax Scenarios

When TurboTax is in the **1993 Plan Mode**, you can use the Tax Alternatives Worksheet along with the **What-If? Menu** to see how changes in your tax situation will affect your tax liability for 1993. If you perform these analyses early enough in the tax year, you'll be able to take the actions that reduce your tax liability. (When TurboTax is **not** in **1993 Plan Mode**, the Tax Alternatives Worksheet can also be used to analyze your 1992 tax situation.)

The organization of the Tax Alternatives Worksheet corresponds to the organization of Form 1040 and Schedule A, but the four columns on this worksheet can present four alternative returns for comparison. When the Tax Alternatives Worksheet is on the screen, the **What-If? Menu** is displayed at the top of the screen instead of the **Main Menu**. You use the **What-If? Menu** commands to manipulate information on the worksheet and to tell the program to calculate the worksheet.

What-If? Menu

Main menu	Whatif calc	Copy col	Add col	Subtract col	MFJ vs MFS
DESCRIPTION OF ALTERNATIVES		(1)	(2)	(3)	(4)
Filing status.....	1.	0.	0.	0.	
Number of exemptions.....6e	1.	0.	0.	0.	
Wages, salaries, tips.....7	0.	0.	0.	0.	
Taxable interest income...8a	0.	0.	0.	0.	
Dividends.....9	0.	0.	0.	0.	
Refunds-State/local tax...10	0.	0.	0.	0.	
Alimony received.....11	0.	0.	0.	0.	
Business income or loss (Schedule C or C-EZ)....12	0.	0.	0.	0.	
Capital gain or loss or loss (Schedule D)....13	0.	0.	0.	0.	
Capital gain distribution.14	0.	0.	0.	0.	
Other gains and losses					

Help Override Note Itemize CrossRef Calc Forms Menu

TAX ALTERNATIVES WORKSHEET Calculated Amt

Tax Alternatives Worksheet

What-If? Menu

- **Main menu** displays the **Main Menu** at the top of the screen.
- **Whatif calc** instructs the program to do the arithmetic and tax calculations for columns 2, 3 and 4. These calculations are initiated only by the **Whatif calc** command or the **F9**

function key. The entries in column 1 of the worksheet are drawn from the other forms when you issue the **Calculate return** command. Column 1 is updated at that time.

- **Copy col** copies the information in one column to another column. Questions on the screen guide you. Ordinarily, you will copy the information in column 1 to another column, then you will change one or more factors in the second column. You cannot copy information to column 1.
- **Add col** adds the corresponding amounts in two columns and places the results in a third column. Questions on the screen ask which columns to add and which column should receive the result.
- **Subtract col** subtracts the amounts in one column from the corresponding amounts in another column and places the results in a third column. Questions on the screen ask which columns to subtract and which should receive the result.
- **MFJ vs MFS** takes a Married Filing Joint return and splits it into two Married Filing Separate returns. TurboTax copies the amounts in Column 1 to Column 2, then places Taxpayer amounts in Column 3 and Spouse amounts in Column 4 according to the Taxpayer or Spouse indicators on the forms. Amounts without a Taxpayer or Spouse indicator are divided equally between the Taxpayer and Spouse columns. After you've selected **MFJ vs MFS**, TurboTax does not modify the information in the **Enter Amount** fields in columns 2, 3 or 4. If you change a total amount in Column 2, alter the individual amounts in Columns 3 and 4. If you change an individual amount in Column 3 or Column 4, alter the corresponding amounts in the other column.

If you want to remove the **MFJ vs MFS** comparison from the worksheet, use the **Erase form** command on the **Edit Menu**. The **Erase form** procedure concludes by calculating the return, so the information in Column 1 will not be affected.

Prepare Data for Transfer to Your 1993 Return

Whether or not you use any of the TurboTax's tax planning features, you should keep a copy of your 1992 data file so next year's TurboTax program can **Transfer** information into your 1993 tax return. If you use the **Next year** command in this year's program, the **Transfer** command in next year's TurboTax will transfer the information in your data file without modification. If you don't use the **Next year** command, the **Transfer** command in next year's program will carry out the **Next year** procedure as it transfers the information in your data file. In either case you'll get a quick start on your 1993 tax return.

This chapter provides suggestions on how to solve problems that you might encounter using TurboTax. If you have difficulty installing the program, see Chapter 1. If the problem involves printing, see Chapter 6.

If the program won't start

First make sure you've typed **TTAX** at the appropriate DOS prompt and you've pressed the **Enter** key. If the program starts but your screen doesn't look right, press the **Alt** key and the **X** key to quit TurboTax, then try starting the program by typing:

TTAX C	for a Color monitor
TTAX B	for a "Black & White" graphics monitor
TTAX B	for an LCD monitor
TTAX M	for a Monochrome monitor
TTAX E	for an EGA or VGA monitor

If a message like "Cannot execute C:\TTAX93\TTAX.EXE" or "Program too big to fit in memory" is displayed, it means your computer doesn't have enough user-available memory. TurboTax requires 512K of RAM. Use the DOS **CHKDSK** command to see if at least 525,000 bytes are currently available.

If you've activated any TSR (terminate and stay resident) programs, try restarting your computer to "free up" enough memory. You might need to edit the **AUTOEXEC.BAT** file on your hard drive if it includes commands that start those programs automatically when you power up your computer. If so, restart your computer afterward.

If you still can't start TurboTax, check the **CONFIG.SYS** file in your DOS or root directory. If necessary, edit the **CONFIG.SYS** file so it contains the statements "**FILES=20**" and "**BUFFERS=5**", then restart your computer.

If You Have a Problem While Using TurboTax

If you encounter a problem while using TurboTax and you are unable to resolve it yourself after consulting the program, the information in the README file and this manual, contact our Technical Support staff as explained in Chapter 10.

Remember to **save your tax return frequently** and to backup your data file occasionally. These procedures can reduce the frustration one experiences when data is lost due to an unexpected computer problem.

If there are no messages but you can't do anything

If your computer makes a beep sound when you press a key, it means you are attempting to use a key that has no effect on TurboTax **at the moment**. Try different keys or your mouse.

If there aren't any beep sounds, check for keyboard response by pressing the **Escape** key and the arrow keys. If there is no keyboard response, you must restart your computer. Unfortunately, data entered since the last **Save tax return** command will have to be entered again. If this situation occurs often, have your computer serviced.

If your mouse isn't working

In order to use a mouse with TurboTax, the mouse driver must be loaded beforehand. This is normally accomplished through a MOUSE.COM statement in the AUTOEXEC.BAT file or a MOUSE.SYS statement in the CONFIG.SYS file. If your system doesn't have either of these statements, you must type a DOS command to load your mouse driver. Quit TurboTax, load the mouse driver, then start TurboTax. Your mouse should be working.

If TurboTax can't save your tax return

The message "Not enough room to save return" means there are not enough free bytes on the disk to hold the file you are attempting to save. The disk to which you save a data file should have at least 100,000 free bytes. If you are saving your tax return to a hard disk, you must delete some unneeded files from your hard disk. If you are saving your tax return to a floppy disk, remove the 3.5" or 5.25" disk that's in the drive, insert a blank formatted disk, then issue the **Save tax return** command again.

If TurboTax can't find your tax return

There are four possible reasons why the program can't find your tax return.

1. You may not have remembered the name of the tax return correctly. To investigate this possibility, select the **Open tax return** command from the **Files Menu**, then check each of the tax returns that are listed in the TurboTax Tax Returns window.
2. The program may be looking in the wrong directory or on the wrong disk.
3. You may have deleted or renamed the data file.
4. You may not have saved the tax return.

To investigate the last three possibilities, select the **Directory** command from the **Files Menu**, then use the **View directory** command to search the possible directories or disks for the data file. If the data file is in another directory, select the **Directory** command from the **Files Menu**, then use the **Set directory** command to access that directory.

The data file for the first tax return you work on is named TAXDATA1.92F. The data files for a second tax return through a fifth tax return are named TAXDATA2.92F through TAXDATA5.92F respectively.

Error Messages

The following is a list of potential error messages with suggestions on how to resolve each situation. The solution to some of these situations is to re-install the program. If you've been using TurboTax, re-installing it will not affect the data file that contains the tax return information you've entered and saved.

Cannot find file
<<File Name>>

TurboTax cannot find a file it needs to continue with the current operation. Use the installation program to re-install TurboTax.

**Checksum Error -
Verify correct copy of
program files**

One or more of the program files is unusable. Try re-installing the program.

**Data Error Reading
Drive A (or Drive B)**

The file in the specified drive is unusable. Replace the Data Disk with the most recent backup copy.

Drive Not Ready

DOS reports the drive to which you are attempting to save your tax return is not available. Select the **Directory** command from the **Files Menu**, then check the **Set directory** command to make sure the correct drive and directory is specified. If you are saving to a 3.5" or 5.25" disk, make sure the disk is properly placed in the specified drive.

**EMERGENCY SAVE
Error has occurred:
Attempt a SAVE
(Y/N)?**

An error has occurred that prevents TurboTax from continuing. If you saved your tax return recently or if you are saving your tax return to your hard disk, type **N**.

If you are saving your tax return to a 3.5" or 5.25" disk, remove the disk, insert a blank formatted disk, then type **Y**. If the data file you saved is unreadable when you run the program again, replace it with your most recent backup copy.

**File Corrupted
<File Name>**

The program is unable to read the file identified in the message. Press the **Escape** key to exit the program, then use the installation program to re-install TurboTax.

**File Missing
<File Name>**

The program is unable to locate the file identified in the message. Press the **Escape** key to exit the program, then use the installation program to re-install TurboTax.

**Invalid Drive and/or
Path**

You specified a disk drive or directory path that does not exist on your system. Enter a different disk drive or directory path.

**Invalid Drive
Specification**

You specified a disk drive that does not exist on your system. Enter a different disk drive.

**Not Enough Room
For New Itemized
Statement**

You have attempted to create a new itemized statement (which requires at least 4 lines), but less than 4 lines are available. The itemized statement and reminder note system can have a maximum of 512 lines of information.

**NOT ENOUGH ROOM
TO STORE FILE**

There are not enough free bytes on the disk to hold the data file you are attempting to save. Remove the 3.5" or 5.25" disk from the drive, insert a blank formatted disk, then issue the **Save tax return** command again.

**Reminder: Tax file
currently being
worked on is not
from new directory**

You used the **Directory** command on the **Files Menu** to change the **Set directory** specification, thereby changing the name of the directory for the data files. The current data file was created in the directory previously specified by the **Set directory** command.

This is a reminder, not an error message. Press the **Enter** key to continue and remember you are using more than one directory for data files.

Run-time error XXX

Several messages in this format are possible, with a number replacing **XXX**. It is extremely unlikely you will ever see a message of this type. Most **Run-time error** messages mean one or more of the program files are unusable and you must install the program again.

Run-time error 2 - The program cannot find a file.

Run-time error 3 - The directory path is invalid or too long.

Run-time error 4 - The CONFIG.SYS file in your DOS or root directory does not contain a FILES command or there are too few files specified. If necessary, edit your CONFIG.SYS file so it contains the statement:
FILES=20

Run-time error 100 - There is a problem with one or more of the program files. Re-install TurboTax.

Run-time error 101 - The disk is full. If you are saving your tax return to a 3.5" or 5.25" disk, replace the disk with a blank formatted disk. If you are saving your tax return on your hard disk, use the **Shell to DOS** command to quit the program temporarily, delete some unnecessary files, then type "exit" to return to TurboTax.

Run-time error 150 - The disk is write protected.
Remove the write protect tab.

Run-time error 152 or 160 - A drive or device is not ready. Check the disk drives, printer and other peripherals to make sure each is operational.

Run-time error 154 - There is a problem with one or more of the program files. Re-install TurboTax.

Run-time error 162 - Hardware failure of some sort.
Check your system.

State Program not found

If you haven't installed your TurboTax state program in the same directory as the federal program, re-install the state program in that directory.

If you haven't entered the two-letter code that identifies your TurboTax state program, select the **Prepare return** command from the **Main Menu**, then select **Prepare state** from **Prepare Return Menu**. Use the **Enter State ID** command on the **Prepare State Menu** to enter the two-letter abbreviation for your state program.

Itemized Statement Area Full

You have accessed an itemized statement but the 512 line limit for the itemized statement and reminder note system has been reached. Delete lines in an existing statement or reminder note, or delete an entire statement or reminder note.

*****WARNING*** Only # itemized statement entries left**

You can enter only the specified number of lines in the current itemized statement. The maximum number of lines for the itemized statement and reminder note system is 512, including Titles, References, detail lines, Totals, and reminder note lines.

Chapter 10 Customer Assurance Plan

ChipSoft has a strong commitment to you. We offer the following services to all registered TurboTax customers.

Technical Support

If you have difficulty installing or using TurboTax, or if it does not operate as described:

- 1.** Consult the documentation and other materials that accompany the product (including the README file). Also check your operating system, interfaces and peripherals.
- 2.** If your question is not answered by the documentation or other materials, contact the ChipSoft Technical Support staff as explained below.

We offer technical assistance at no charge to all registered TurboTax customers. The Situation Report at the end of this chapter illustrates the type of information our staff requires to assist you. For faster service, complete the form and have your customer number or program serial number when you contact us.

If you've purchased the HeadStart Edition from a store or dealer, please register your program by filling out the TurboTax Program Registration Card enclosed in the package or the program so we can ship you a free copy of the Final Edition that's required to prepare the IRS copy of your tax return. Mail your registration card to: ChipSoft Personal Order Department, 6330 Nancy Ridge Drive, San Diego, CA 92121-3290, or fax it to (800) 756-1040.

Telephone

Technical Support representatives are available year round to answer your questions about TurboTax from 8:30 a.m. to 5:00 p.m. (Pacific Time), Monday through Friday.

From January 18 through April 15, Technical Support representatives are available from 6:00 a.m. to 7:30 p.m. (Pacific Time), Monday through Friday, and from 8:30 a.m. through 2:00 p.m. (Pacific Time) on Saturday and Sunday.

Our representative will be able to help you more quickly if you are at your computer when you telephone. Be prepared to name your program (TurboTax 1040, HeadStart Edition or Final Edition), and to identify your customer number or program serial number.

Technical Support telephone number: (619) 453-4842

If you are using a touch tone phone, you can access our Intellisystem of recorded Technical Support information 24 hours a day, 7 days a week. Follow the simple instructions and use the keys on your phone to obtain information about program installation, program operation, printer setup and printing.

Toll-Free 800 Fax

The ChipSoft fax machines are available for you to send a question to our Technical Support staff. Your fax will receive priority treatment if you include a completed photocopy of the TurboTax Situation Report (and a sample printout, if applicable). Include your fax phone number because our reply will be by fax. Replies are sent between 11:00 p.m. and 7:00 a.m. (Pacific Time), so your fax machine should be set to receive during that time.

Toll-free Technical Support 800 fax: (800) 766-8890

Mail

You can write to our Technical Support staff about any aspect of program operation. Your correspondence will receive priority treatment if you include a completed photocopy of the TurboTax Situation Report found at the end of this chapter. Please include a sample printout and/or a copy of your tax data file, if applicable. Our reply will be by mail.

Technical Support mailing address is:

ChipSoft, Inc.
Technical Support Department
6330 Nancy Ridge Drive, Suite 103
San Diego, CA 92121-3290

Electronic Bulletin Board

The ChipSoft Electronic Bulletin Board is available to check information listings, obtain product information, place an order, send a question to our Technical Support staff or converse with other users. The Bulletin Board **cannot** be used to download ChipSoft program files or upload utility programs.

The modem parameters to use are: **no parity, 8 data, 1 stop bit**. Baud rates supported are 300, 1200, 2400 and 9600. Please use a password you will remember and make a note of it.

ChipSoft Electronic Bulletin Board (619) 453-5232

9600 baud only (619) 453-4165

Customer Service

The ChipSoft Customer Service Department is available to provide after-sale, non-technical services such as tracing undelivered orders, replacement disks, billing questions, etc. Customer Service representatives are available year round from 8:30 a.m. to 5:00 p.m. (Pacific Time), Monday through Friday.

From January 18 through April 15, Customer Service representatives are available from 6:00 a.m. to 7:30 p.m. (Pacific Time), Monday through Friday, and from 8:30 a.m. to 2:00 p.m. (Pacific Time) on Saturday and Sunday.

Customer Service telephone number (619) 453-1604

Toll-free Customer Service fax number (800) 756-1040

Customer Service mailing address is:

ChipSoft, Inc.
Customer Service Department
6330 Nancy Ridge Drive, Suite 103
San Diego, CA 92121-3290

Personal Product Sales

The ChipSoft Personal Product Sales Department is available to take product orders and provide basic product information (including program availability dates). Personal Sales representatives are available year round from 8:30 a.m. to 5:00 p.m. (Pacific Time), Monday through Friday.

From January 18 through April 15, Personal Sales representatives are available from 6:00 a.m. to 7:30 p.m. (Pacific Time), Monday through Friday, and from 8:30 a.m. to 2:00 p.m. (Pacific Time) on Saturday and Sunday.

Personal Product Sales phone number: (619) 453-8722

Toll-free Order Services fax number: (800) 756-1040

Professional Referral Service

The ChipSoft Professional Referral Service is available to provide assistance in preparing or completing your tax return. To receive a list of the TurboTax ProSeries/1040 tax practitioners nearest you, check the Professional Referral Service box on the Program Registration Card or contact the ChipSoft Customer Service department. The TurboTax ProSeries/1040 tax practitioner will establish with you the services to be provided and the fees to be charged, independent of ChipSoft.

Money-Back Guarantee

If you are not completely satisfied with TurboTax when purchased directly from ChipSoft, return the entire package to us and we will refund your purchase price in full. We must receive your return by April 15, 1993. Call the ChipSoft Customer Service department at (619) 453-1604 for details.

CompuServe and GENie

You can obtain information on all ChipSoft products and receive TurboTax technical assistance through the CompuServe Information Service or GENie - the General Electric Network for Information Exchange. If you post a technical support question, our staff will reply on that BBS as soon as possible.

Special CompuServe Offer for ChipSoft Customers

To receive a free membership to CompuServe that includes a \$15 usage credit, call **(800) 848-8199** and ask for **Operator #145**. Outside the United States and Canada, call (614) 457-0802. CompuServe will mail your Introductory Membership immediately. Once you're connected to CompuServe, type **GO PCVENB** at any ! prompt to access the PC VendorB Forum.

Special GENie Offer for ChipSoft Customers

Sign up now. If you are not completely happy after your first 30 days, your \$4.95 subscription fee will be refunded. To sign up, set your communication software for half duplex (local echo) at 300, 1200 or 2400 baud, then dial **(800) 638-8369**. In Canada, call (800) 387-8330. Upon connection, enter **HHH**. At the **U#=#** prompt, enter **XTX99612,CHIPSOFT**. Have a major credit card ready. For more information in the United State or Canada, call **800 638-9636**.

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PERSONAL/1040 MENU SUMMARY

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New tax return Open tax return Delete tax return Save tax return Revert to saved	Alt-A Alt-D Alt-O Alt-S	Step 1 Name tax return Step 2 Transfer Step 3 Import . . . Quicken Step 4 Select forms Step 5 File cabinet Step 6 Final review Step 7 Print return Step 8 File Electronically Step 9 Backup return Step 10 Prepare state Step 11 Tax planning	Calculate return Cross reference Calculator Itemize statement . . . Reminder notes . . . Previous form Tax summary window	Goto EasyStep Continue EasyStep Tax help for this line IRS instructions Other topics . . .	F1 Alt-E Alt-F1 F8
Directory . . . Print . . . Printer Setup . . .	Program options				
Shell to DOS Exit TurboTax	Alt-Z Alt-X				Exit menu Exit TurboTax



Speed Key Summary

Quick Access Keys

Alt A	New tax return	Alt I	Itemize Statement	Alt S	Save tax return
Alt B	Previous form	Alt K	Calculator	Alt T	Reminder Notes
Alt C	Calculate return	Alt L	Final Review	Alt U	Tax summary window
Alt D	Clear field	Alt M	Menu	Alt V	Edit Field
Alt E	Continue EasyStep	Alt F1	Tax Help for this line	Alt X	Exit TurboTax
Alt F	Forms	Alt O	Override	Alt Z	Shell to DOS
Alt G	Goto State	Alt P	Print		
Alt H	Help	Alt R	Cross reference		

Function Keys

F1	Help Menu/EasyStep	F4	Back to Form	F8	IRS instructions
F2	Edit Text Field	F6	Form Selection Menu	F9	Calculate tax return
F3	Cross Reference	F7	Display Menu	F10	Save tax return