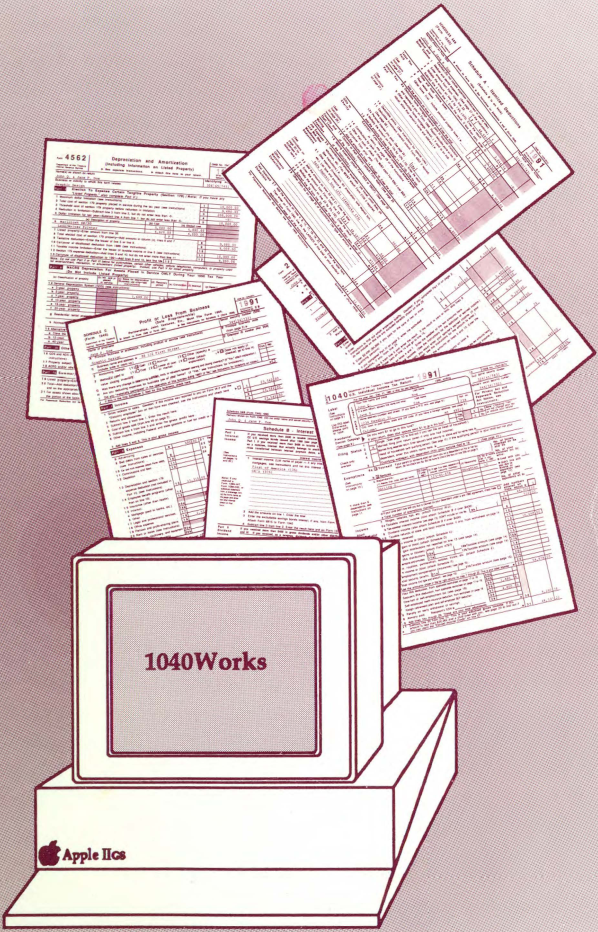
1040Works-X™

Tax templates for AppleWorks



by Dan Verkade and Phineas R. Fiske

— National AppleWorks Users Group —

LIMITED WARRANTY

NAUG wants you to be satisfied with 1040Works™ and 1040Works-X™ and will gladly refund your money if you are dissatisfied for any reason.

1040Works and 1040Works-X are designed to help you prepare your Federal Income Tax return, but there is no practical way to assure that it will work correctly in every tax situation. If an error or omission is discovered in these templates, we will try to notify you of the changes needed to correct your disk. However, the developers of this program and the National AppleWorks Users Group can accept absolutely no financial responsibility for your tax return; you must check your return manually to be sure that it is correct. By using this product you agree that you are responsible for checking the accuracy of your return and that NAUG's liability is limited to refunding the purchase price of 1040Works. EXCEPT AS SET FORTH ABOVE, NAUG MAKES NO EXPRESS WARRANTY WHATSOEVER AND, SUBJECT TO PROVISIONS OF APPLICABLE STATE LAWS, NAUG DISCLAIMS ANY AND ALL IMPLIED WARRANTIES, INCLUDING WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, AND ANY WARRANTY COVERAGE FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES.

If you receive an inoperable or defective disk, contact NAUG for a free replacement.

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Introduction

Welcome to 1040Works-X, the National AppleWorks Users Group's tax templates for AppleWorks. This package will help you prepare and print your 1991 Federal Income Tax return using AppleWorks on any Apple II or compatible computer with at least 256K of memory. Before you begin, look over the enclosed materials, read the Quick Tour section of this manual and look through the rest of the manual. Run through the software at least once for practice. Do the Tutorial if you are new to 1040Works-X.

1040Works-X uses AppleWorks' spreadsheet module. If you are not comfortable with that module, we suggest that you get some information about using it. A good source is the booklet *How To Get Started with the Spreadsheet Module* published by the National AppleWorks Users Group ($7.50 plus $1.75 s/h). Please call or write to order; NAUG's address and telephone number are on the back cover of this manual.

What You Received

The package you received should include this manual and a 3.5-inch 1040Works-X Disk or two 5.25-inch disks labelled "1040Works-X" and "1040Works-X — Utilities". You will need at least two blank 5.25-inch disks or one blank 3.5-inch disk to store your data.

This manual provides an overview of 1040Works-X and form-by-form guidance. The Table of Contents lists the sections in this manual; page 2 contains a directory to the different forms. Look at these sections and the Quick Tour section first, then go on to the General Guidelines starting on page 10. Read any Appendices that apply to you. Also check the disks for an AppleWorks word processor file named A.READ.ME that includes last minute information.

CAUTION: DO NOT USE THIS SOFTWARE WITH APPLE-WORKS GS. These templates will work with any version of the original AppleWorks. However, AppleWorks GS does not import these templates correctly – they are just too complex.

What's New

Here are some of the new features of the 1991 version of 1040Works-X:

1. A new file named WORKSHEETX. The 1040Works-X macros use WORKSHEETX to store your name and social security number and some intermediate data. If you use macros, you should keep WORKSHEETX on the desktop while you work with these templates.
2. Enhanced macros and some changes in the keystrokes that invoke other macros. A list of all the macros appears in Appendix A. Remember that these macros are timesavers but are not required by 1040Works-X.
3. New forms, including Form 2210 (Underpayment of Estimated Tax), Form 8283 (Non-Cash Charitable Contributions), and Form 8829 (Home Office Deduction).
4. Most forms no longer need a Forms Actuator.
5. No longer requires greenbar paper; you can print and submit the 1991 output on standard 20 pound white paper.
6. No longer supports AutoWorks, MacroWorks, Super MacroWorks, and KeyPlayer.

Quick Start

You may be tempted to plunge right ahead without reading this manual. We don't encourage it. But if you must, heed these warnings:

— Ignore stray on-screen characters if you use AppleWorks 2.1 or earlier (page 12).

— Always work with AppleWorks in the Editing Mode (solid cursor) (page 15).

— Always round numbers to the nearest dollar before entering them (page 16).

— Always press <oa-U> before making an alphabetic entry (page 16).

— Beware of a bug in version 2.0 of AppleWorks that can destroy your data (Appendix C, page 59).

— Read this manual before actually preparing your tax return.

— 1040Works-X is a guide to help you prepare your taxes. You should check your work manually before sending your forms to the IRS.

A Quick Tour around 1040Works-X

The core of 1040Works-X is a file called MODULE.X which contains most of the tax schedules and forms you file. That is where you will make most of your entries. MODULE.X is a big spreadsheet; it is a good idea to have a look around before going to work. Here's how:

Start up AppleWorks and load MODULE.X onto your desktop. An index for the module will appear at the top of the screen. The spreadsheet itself extends both down and off toward your right. Scroll down below the index and you will find the Personal Data Worksheet. This is the foundation of your tax return.

Personal Data Worksheet

Enter your filing status and the number of exemptions you claim at the top of the Worksheet; they are necessary before any meaningful computations can be made. You can change them or anything else you do later, if need be.

Now scroll down the Worksheet, using the Down-Arrow Key. The Worksheet will gather information that is reported on the front side of Form 1040 and elsewhere. It is here that you will enter your wages and taxes paid (from your W-2 forms) and many other types of income. There are several mini-worksheets that help you compute the taxable portion of your income from pensions or unemployment payments or Social Security. As you use 1040Works-X, you will add to the information you assemble here by completing various schedules and forms, but this is the place to start. Be sure to go all the way to the bottom.

Once you look over the Worksheet, go back to the top and look at the other forms, which are arrayed in a row to your right (see the map on the inside back cover). Use the Open-Apple and Right-Arrow Keys to leaf through them, one at a time. Scroll to the bottom of a couple of the forms to see what they look like. Keep going until you get to the 1040 Side One Report. This is where all the income data you enter into the Personal Data Worksheet and various schedules will be reported. If you entered some trial data, try recalculating now with <oa-K> and you will find some income figures beginning to fill in the Report. As you complete various schedules, more and more data will appear here.

Now go back to the top (<oa-1> will get you there fast), and continue paging to the right with the Open-Apple and Right-Arrow keys. The next form you come to is Schedule A, the form you will use to itemize your deductions.

Next you will see two numbered forms (Form 2441 and 6251). Keep scrolling through the forms with the Open-Apple and Right-Arrow Keys until you come to the 1040 Side Two Report. This is where you will find what you owe the government. Scroll down until you come to the tax calculation section. If you entered data into 1040Works-X and recalculated, you may find a number there already. Don't panic (or leap for joy); the number is of no consequence until you enter all your tax data.

The Side Two Report is the last screen. Further to the right is the tax calculation area, which is for AppleWorks' use only; do not enter any calculations in that area. Hidden in a corner is the Readout window. Follow the on-screen directions for using this window, but otherwise, this part of the module is off-limits to you.

That completes your introductory tour of the most important component of your tax software. You will probably also need to use additional forms that aren't in MODULE.X. 1040Works-X includes separate forms either as IRS-acceptable print-outs or as worksheets. However, you must transfer the results from these forms and schedules into 1040Works-X's main module; macros on the disk can help you with this task. In addition, you must manually copy any data generated on a 1040Works-X worksheet onto a standard IRS form. It doesn't matter in what order you prepare the forms, but you may find it easier to do the separate ones first, so you don't have to go back and do them after you are working with the main module.

General Guidelines

1040Works-X runs under AppleWorks on any Apple II compatible computer with at least 256K of RAM. You should have a printer so you can print finished forms that can be submitted directly to the IRS after you check your work. However, IRS regulations require that you copy your 1040 data directly onto an IRS-supplied Form 1040.

1040Works-X prints 10 characters per inch on a 74-character line, with 6 lines per inch. This is the standard for IRS forms and most printers. Paper should be 20 pound, 8.5 by 11 inches after the tractor feed edge is removed.

Lastly, it is essential to have the 1991 IRS tax forms and instructions; computer-generated forms do not include all the text that appears on printed IRS forms. If you are not familiar with a form, check the printed IRS version for more detail. You should have your 1990 tax return handy and, if possible, two prior years' returns as well, and any commercial tax guide you like to use.

Remember that 1040Works-X is only a guide to help you prepare your taxes. You should check your work manually and must follow the instructions provided both in this manual and by the IRS when entering data. The software will not make judgments about your tax situation nor recommend which forms you should file.

About the Disks

1040Works-X comes on one 3.5-inch or two 5.25-inch disks with data on both sides. (The 5.25-inch disks contain data on both sides, even if both sides are not "notched".)

1040Works-X is protected by copyright; it is against federal law to give or sell copies of these templates to any other user. However, 1040Works-X is not copy protected; we urge you to write-protect the original disks and copy them onto working disks. Use the working disks when preparing your return. That will preserve your original disks in case you inadvertently overwrite one of the files on the working disk.

1040Works.X Modules

Each 1040Works-X module prepares one or more tax forms. Most of the forms you will use are in the file MODULE.X, which includes the front and back sides of a Form 1040 and the most commonly used supporting schedules and forms. The tax forms and worksheets are arranged as though they were spread out side-by-side in front of you on a desktop (see the map on the inside back cover). You start by filling out the Personal Data Worksheet, then flip through the forms to the right using the Open-Apple and Right-Arrow Keys.

MODULE.BUSI prepares the forms required to report business and farm income. You can ignore MODULE.BUSI if you do not need to file any of these forms.

A.TUTORIAL.X is a tutorial; try it.

The ORGANIZER may help you gather your tax data; see Appendix B.

The INTERFACE helps you move data from financial management software into 1040Works-X; see the INTERFACE.DOCS file on the disk.

The macro files simplify the data entry and retrieval process. The files include additional macro instructions; see Appendix A.

Have a Look Around

After doing the tutorial, take a look at the various forms in MODULE.X. Scan the Personal Data Worksheet to see what kind of information it requires. Then look through the other forms until you get to Form 1040 Page Two.

When a form is aligned correctly on the screen, pressing Open-Apple Left-Arrow or Open-Apple Right-Arrow will move you directly to the adjoining form. When the arrowheads at the top of the screen touch the left and right edges, you are properly aligned on the tax forms... like this:

```
<-------------- THIS IS SCHEDULE E ----------->
```

To see the bottom of a tax form, scroll down by holding down the Down-Arrow Key. You can use AppleWorks' Title Command to keep the Label Bar at the top of the screen. (Put the cursor on the line just below the Label Bar and press <oa-T>, then press the Return Key. When you return to the top of the screen, you will see two label bars. That's normal; ignore it. Repeat the same steps to eliminate the Label Bar.)

To get to the top of a form, use AppleWorks' <oa-1> "Ruler" Command. The ruler isn't helpful going down, so don't try to use it.

To go quickly to a particular form, find its Locator Cell number, which accompanies the description of each form in this manual and also appears at the beginning of each major module. Then use AppleWorks' Find Command to go directly to that location. That is, press <oa-F>, select "Coordinates," enter the cell address, and press the Return Key. Macros simplify this process. See Appendix A for more information about using macros.

If you become disoriented, enter an <oa-1> to go to the top of the spreadsheet, then press the Left-Arrow Key until a complete form lines up on the screen or you reach the module index.

NOTE: If you are using a version of AppleWorks prior to 3.0, you may occasionally notice an extra column of letters on the right side of the computer screen. Ignore these letters or, if they bother you, scroll the form up or down until they are off the screen. They will be gone when you scroll back.

Getting Started

Start by assembling your tax information and decide what forms you will need. If your income sources and expenses don't change much from year to year, a look at last year's return should be a good guide. Group your information by the type of income involved.

It's important to have blank tax forms, such as those included in the IRS instruction booklet. These forms provide more information than the computer-generated forms.

If you need to use MODULE.BUSI, complete that module early in the process; even before you start entering data into MODULE.X. You should also complete the less important forms that are in separate 1040Works-X files and transfer data from each of the small modules into MODULE.X. Most of the forms have a reporting area at the top that abstracts the numbers you must transfer into 1040Works-X's main module.

When using a module containing many tax forms you can skip any forms that don't apply to you, but DO NOT EVER DELETE ANY ROWS OR COLUMNS from tax forms. To do so could destroy formulas in cells on other forms.

It's Easy

Now it's time to do the tutorial. Load the file A.TUTORIAL.X onto your AppleWorks desktop and work through the file. The tutorial will familiarize you with the way to enter and calculate data. When you are done, you are ready to start working on your tax return.

To get started, cover the write-protect notch on your original 1040Works-X disk(s). Then format two 5.25-inch disks or one 3.5-inch disk to hold the tax return you will create. If you use 5.25-inch disks, name one MAIN to store MODULE.X and the other FORMS to store all the subsidiary forms. Then either use a disk utility program to copy the 1040Works-X files onto the corresponding new disk(s) or load the files you plan to use onto the AppleWorks desktop and save the files onto the appropriate disk(s).

If you use 5.25-inch disks to store your data, you will find that saving MODULE.X presents a special challenge. See Appendix C for guidance if you need help solving this problem.

IRS Rules

It is important to follow all IRS instructions closely. For example, the IRS has specific requirements for computer-generated tax returns. If you deviate from their instructions, the IRS may question your return, which is the last thing you want to happen.

Some important points: Do NOT change the format of any form to be filed with the IRS. If there are more entries than will fit on a form, include a total and give details on a separate sheet. Do not change the character size and lines per inch settings of your 1040Works-X forms. You must print at 10 characters per horizontal inch and 6 lines per vertical inch. Be sure the margin around the printed area of a form is at least one-quarter of an inch; a half-inch is better. Always remove the tractor-feed edges before submitting forms to the IRS. In all other aspects, follow the same rules for preparing your return as you would with regular IRS schedules and forms. The closer you stick to the IRS requirements, the safer you are.

Forms and Worksheets

1040Works-X includes two types of forms. Most can be printed out and submitted directly to the IRS; a few serve as worksheets to develop data you will transfer to official IRS forms. The format of the two types differs. IRS-acceptable forms have text in capital letters and asterisks separating sections. DO NOT CHANGE THE FORMAT OF ANY FORM TO BE FILED WITH THE IRS. Worksheets are in capital and small letters and have dashed lines between sections.

Notes

The top of many forms and worksheets contain a Notes area, which can include several kinds of information. A [K] symbol in the upper right corner shows how many recalculations are needed to complete the page. ([K]x3 means press <oa-K> three times.) Some Notes areas contain reminders of data that you must enter into the form; others require you to input data in the Notes area itself. Some notes alert you to limitations applying to the tax form. Read all notes before proceeding with a form to see if they apply to you.

Computer-Generated IRS Forms

The text on forms to be filed with the IRS is entirely in capital letters. Any entries that appear in small letters are prompts that remind you to fill in the line. Prompts should be filled in on-screen. A 'yes/no' prompt should always be answered, unless it obviously doesn't apply.

Making Entries on IRS Forms

Before you begin, make certain that AppleWorks is displaying the overstrike cursor (the solid rectangle). Make all entries with the overstrike cursor. To access the overstrike cursor, use <oa-E>.

Headers on IRS Forms

Each IRS form has a header that identifies the form and asks for your name(s) and the Social Security number of the family member responsible for preparing the return. (The IRS assumes the preparer of a joint return is the primary breadwinner.) Move the cursor to the respective sections, press <oa-U>, and enter the required information. Save space by entering the last name only once, as in: John and Betty Smith. Some forms have small areas for names; you may have to go to the adjoining cell to finish your entry. Macros will simplify this — see Appendix A.

Entering Numbers on IRS Forms

Most entries are numerical; you make these entries by putting the spreadsheet cursor on the space for the number, typing in the number and pressing the Return Key (or moving the cursor on to another cell with an Arrow Key). If you type the wrong number, go back and type the right one in its place.

In most cases, losses must be typed in as minus (-) numbers so they appear on the tax forms in parentheses, as in "(700.00)". (The exceptions are noted in the Notes section on the form.)

AppleWorks is not reliable about rounding numbers, so it's important to ROUND NUMBERS TO THE NEAREST DOLLAR BEFORE ENTERING THEM. To round, drop off the cents if they are less than 50, and report the next full dollar if the cents are 50 or more.

Some cells are locked because they are only used for computations or to report numbers developed elsewhere in the module. 1040Works-X will not let you make an entry in these cells. If you override the lock and enter a number, you will destroy the formula in the cell.

Most forms and worksheets include arrow prompts (>) that show you where to make a numerical entry; lines that lack arrow prompts are generally calculated by 1040Works-X. Note that special rules apply to Schedule A, which has some cells containing formulas in which you MAY make entries, unless you are transferring data from other financial management software.

Entering Words on IRS Forms

Some forms require you to enter textual information, such as names or your answers to yes/no questions. You can type in most of these entries from the keyboard. Make certain the cursor is in overstrike mode (the blinking solid cursor, not the under-line). Call the contents of the cell into the editing block at the bottom of the screen by entering an <oa-U>, then type the required information and press the Return Key. (Entering data without using the editing function could destroy other necessary text in the same cell. That is why most non-numeric cells are protected to prevent direct entries.)

If you make a mistake and need to edit the entry, issue another <oa-U> and either type over the entire entry or just the parts that need correction. You can remove letters by typing spaces over them. Avoid using the Delete Key if there is other information in the cell you are correcting.

If a keyboard entry looks too complex, make it by hand after you print out the form. (Just don't forget.)

Prompts for Text Entry on IRS Forms

Some lines for alphabetical entries have carat (^) prompts. They are there to help you align entries in neat columns.

Some cells provide a vertical bar in the editing block at the bottom on the screen, showing how far you may type, like this:

```
(alignment
  prompt)------> ^                  | <— (limit of entry)
```

Anything you type over or beyond the bar won't appear on your tax form.

Yes/No Entries on IRS Forms

Yes/no entries are like numerical entries; they do not require that you use the editing mode. To answer yes/no questions, simply put the spreadsheet cursor on the 'yes/no' prompt, type the response, and press the Return Key.

Worksheets

Worksheets have line numbers that match the corresponding IRS forms, thus making it easier to look up IRS rules about an entry or to copy data from the worksheet to a printed IRS form. Some worksheets also include extra entries, representing computations that the

IRS requires but that do not appear on IRS worksheets. If you find a worksheet with two sets of line numbers, the first, larger number refers to the line on the tax form where the result is to appear; the second, smaller number refers to lines in the IRS instruction booklet. In the line below, "Ln 31" is a location on Form 1040; "2" is the IRS line number for the worksheet you are preparing.

```
Your gross adjusted income (Ln 31, 1040).....2    Ø.ØØ
```

Status Entries

Some entries on worksheets and forms require you to enter the number "1" if you meet certain criteria or leave the cell blank or set to "Ø" if you do not meet those criteria. Fill in these numbers if they apply to you; they affect later computations. If the IRS tax form asks for a check mark in a box, enter the number "1" in 1040Works-X.

Calculating Totals

Small modules are set to recalculate after each entry. Larger modules would be time consuming to calculate automatically; you must manually recalculate these modules using <oa-K>. Recalculate each time you finish a section of a form on a major module or reach a locked subtotal cell and want to display the total.

On worksheets, a [K] symbol in the left margin alerts you to recalculate to get the results for that line. "[K]x2" means you should recalculate twice. When you finish each major module, recalculate four times to make sure that all the totals are final. (A suggestion: If any entry doesn't look right, recalculate again.)

Some early computations depend on information that you won't enter until later; some aren't final until your return is otherwise finished. In particular, calculations of taxable Social Security, IRA deductions and Form 6251 (Alternative Minimum Tax) aren't complete until you finish the rest of MODULE.X.

Large modules include several chain calculations that require you to press <oa-K> more than once. You don't have to wait for the first calculation to finish before pressing <oa-K> again. Press it twice and the recalculation will be performed twice, without a pause in between. If you use macros, invoke the <sa-K> macro.

Printing Your Tax Return

You can print the forms for any completed module, or if you don't have a printer, you can copy the numbers from the screen onto the IRS form.

Print the single form modules when you are done entering data. That makes it easier to transfer the numbers into other modules. You should also print a copy of each worksheet for your records.

General Information about Printing

1040Works-X configures AppleWorks to print with a half-inch margin on the top, sides and bottom (as the IRS requires).Do not change the characters per inch or lines per inch settings on the Options Menu. The default settings produce the correct output.

What to Print

Computer-generated forms that you intend to file with the IRS should include only the part of the spreadsheet between the double-dashed lines in rows 12 and 73. Do not print out the Notes above the form or the dashed lines themselves. The forms you submit are identifiable because the text is entirely in capital letters, and because they use rows of asterisks as section dividers. Worksheets may be printed out in their entirety, or print only the part you need; they are only for your use.

How to Print IRS Forms

Center the form you want to print on the screen. Then put the cursor in the upper left hand corner of the form (on the name of the form) just beneath the double-dashed line (======) that separates it from the Notes area. Press <oa-P>. When AppleWorks asks what you want to print, press <B> to specify a Block. Then move the cursor to the right side of the screen, to highlight the entire width of the visible screen, and then down to the row above the double-dashed lines marking the bottom of the form. Then press the Return Key and follow the normal printing procedure. (If you are using 1040Works-X macros, use the <sa-P> keystroke.) Your printer will produce a form acceptable for filing with the IRS. However, do not submit the 1040 Form or worksheets produced by 1040Works.

Printing Worksheets

Worksheets are for your use only. Some worksheets require you to transfer numbers to the printed IRS form; others are simply to develop information needed for a form or schedule. Worksheets often require more than one sheet of paper.

Printing Problems

Printing problems are usually the result of a mismatch between AppleWorks' printer settings and your serial card (if you have one) and/or your non-Apple printer. If your printer does not print the form correctly, make certain that AppleWorks' serial card setting is correct for your system. The default setting is Control-I 8ØN. That works well with Apple printers and most interface cards but may not be correct for your hardware combination. (See the AppleWorks manual and your printer manual for further details.) If you have a IIGS, check and make certain that the Printer Port settings in the Control Panel are all set to default standards, or are consistent with your non-Apple printer.

Your printer may differ in the way it handles margins, so it may be necessary to issue an <oa-O> command to change the margin settings for some modules. Refer to your AppleWorks manual for more information about setting the margins.

Assembling Your Tax Return

Print all the forms you are using. To copy data onto your IRS 1040, take the printouts of the Report screens for Side One and Side Two and align them with the IRS Form 1040. The line numbers will more or less match. (Watch out for indented entries.) Then manually copy the numbers from the 1040Works-X reports onto the IRS Form 1040. Gather the computer-generated and IRS forms together, assemble them (schedules first) in alphabetical and numerical order, and attach them to the 1040. If you prepare supporting statements, make sure they are labeled to correspond to the form they supplement, assemble them in the same order as the schedules and forms, and attach them to the back of the package. Sign the 1040 and put this paperwork in the IRS supplied envelope (with a check or money order, if needed) and mail to the processing center identified in your IRS instruction booklet. Keep the disks for your files; you may want to print out a plain-paper copy to fill up your file cabinet, too. That's it.

Individual Forms, Schedules, and Modules

The following pages describe how to complete each form, schedule, and module. Use the file name or Locator accompanying the instructions to find the form you want. Locators refer to the spreadsheet locations of forms that are part of multi-form modules (such as MODULE.X and MODULE.BUSI).

Instructions for MODULE.X

PERSONAL DATA WORKSHEET **LOCATOR: A1**

This is the longest of all the forms and worksheets; it is the building block for your return, and collects a variety of data. The entries in the Personal Data Worksheet follow the same pattern as the IRS Form 1040. In all likelihood, only a few of the entries will apply to you, but read it to the end to make certain you provided all the necessary data. Results from this and from all other forms advance automatically to the Form 1040 Reports section.

In the Filing Status section, enter the appropriate number in the cell that describes your filing status. YOU MUST DO THIS.

In the Exemptions section, enter the number of exemptions of each type that you will claim. YOU MUST DO THIS.

In the Earned Income section, supply ALL the applicable data from your W-2 that is requested. Don't forget to enter the Social Security (FICA) tax withheld from your pay.

Many entries are numbered to correspond with entries on the 1040. If you have doubts about what information is needed for any particular entry, refer to Form 1040 and the IRS instruction book or another tax guide. Some areas require separate entries for the income of each spouse. Be sure to enter data for the correct person.

If you have interest or dividend income of $400 or less, report it on this worksheet along with tax-exempt interest and any taxes withheld from your payments. If either interest or dividends exceeds $400, report that income on Schedule B.

1040Works-X collects data on pensions and annuities separately but combines them when making its final calculations. There are several ways to calculate taxable pension payments. The IRS changed the requirements in 1987; make sure you use the correct method. If you are eligible to use the IRS's so-called Three-Year method, use all six lines of the pension worksheet and copy the number in Line 1c to Line 3. Otherwise, enter the amount you received in 1991 on Line 2 and the amount NOT taxable on Line 3; 1040Works-X will calculate the Line 4 amount. If your payments started after mid-1986, you may be able to use a

1040Works-X module called PENSION (see page 39).

The section dealing with Social Security income requires data that won't be available until you have totalled your other income on Form 1040 Side One. As a result, the numbers here may change as you progress through the module.

In the Adjustments section, be careful when computing any IRA deduction. This section requires information about your total income, so it won't be final until you have finished preparing 1040 Side One. Basically, if neither you nor your spouse has a pension at work, you CAN use the IRA worksheet. If you (or your spouse) have a pension AND your income exceeds a certain level, you may be eligible for only a PARTIAL IRA deduction or none at all. If that is the case, and you made an IRA contribution, 1040Works-X will alert you that you must prepare Form 8606. Also remember that if you are married, there are separate entries in IRA worksheets for a spouse that doesn't have an income and one that does.

SCHEDULE B - Interest and Dividends LOCATOR: C1

Schedule B is a printable form you can submit to the IRS. You must use this form, not the 1040 Personal Data Worksheet, to report interest or dividend income of more than $400.

In Part I, Line 2, identify each source of income and the amount from that source. Issue an <oa-U> and put the overwriting cursor on the first dot as you enter each line; the entries will align neatly. If there are more entries than will fit, insert a note that you will supply a separate listing (detailing individual sources and amounts) and put the total from that list in the 'Amount' column next to your notation. The IRS now requires that you list tax-exempt interest income on this schedule and deduct it before reporting your taxable interest.

1040Works-X will automatically deduct your excludable savings bond interest. Also, enter all tax exempt interest you received where asked in the Notes area.

In Part II, list sources of dividend payments and amounts. If some payments included capital gain distributions, enter them on

Line 7 (Row 57) and include them either on Schedule D (if you prepare one) or on the Personal Data Worksheet (if you haven't already done so).

Don't forget both 'yes/no' questions in Part III.

DATA TRANSFER WORKSHEET **LOCATOR: E1**

This is a worksheet. Enter income data from Form 2106 here; enter income data from Schedules C and F on MODULE.BUSI; and enter income data from any K-1 Forms listing self-employment partnership income. There are separate lines for businesses belonging to Person 1 (which the IRS assumes is the major breadwinner) and to Person 2. NOTE: Be sure partnership income is also reported on Schedule E.

SCHEDULE SE - Self-Employment Tax **LOCATOR: G1, J1**

This is a printable form you can submit to the IRS. 1040Works-X includes two Schedule SE's: The first for the person filling out the return; the second for a joint return that includes a spouse with self-employment income. The IRS publishes a two-page version of Schedule SE; 1040Works-X computes the second, more comprehensive page. These forms get most of the data they require from the Data Entry Worksheet on the left. (One major exception: Clergy or other people who do not have Social Security (FICA) taxes withheld at work but who are still liable for Social Security must report their W-2 wages and any other payments that are considered income (allowances, etc.) in the Notes area at the top of Schedule SE.)

SCHEDULE D - Capital Gains and Losses - Page 1 **LOCATOR: M1**

This is the first page of a two-page printable form you can submit to the IRS; you must complete both pages of the form. You can fill out Columns A, B, and C for Parts I and II either on the computer or by hand after you print the form. Fill out Columns D and E on the computer because they affect the computations.

Some taxpayers receive information from companies or financial institutions that includes only the actual amount of the gain or loss, not the numbers used to compute it. 1040Works-X offers "memorizing cells" on Schedule D that accept gain or loss figures if you do not know the selling price or tax basis. These cells are in the bottom two rows in the main section (for Form 1099-B Transactions) of Parts I and II, and the single bottom row in the Other Transactions section of Parts I and II. To use these cells, enter amounts in Columns D and E that are sufficient to produce the gain or loss you must report, and recalculate. After the desired gain or loss appears in Columns F or G, replace the numbers in Columns D and E with zero and recalculate again. The gain or loss figure will remain. (To eliminate a gain or loss from memorizing cells, put the number one (1) in the selling price and basis columns and recalculate; then replace them with zeroes and recalculate again.)

New for 1991 is a 28% maximum tax on income derived from capital gains. If you have a net long-term capital gain and your income is over the limits listed on Schedule D, you must calculate your tax using Schedule D.

Form 1040 Side Two will automatically use the tax from Schedule D if it applies to you. For the calculations to be accurate, you must first complete all of Schedule D up to line 18. You must also complete Form 1040 Side Two up to line 37. Then recalculate three times.

Note: If you have too many entries to fit in Schedule D, use Schedule D-1 which provides additional space for short-term and long-term gain and loss calculations. Schedule D-1 is in the file called SCHEDULE.D1 on your 1040Works-X disk(s). When you are done, you must manually copy the data from Schedule D1 into either line 1B or 8B of Schedule D.

SCHEDULE D - Capital Gains and Losses
- Page 2 **LOCATOR: T1**

Formulas in Part III do all the necessary computations. Part IV requires data that will be developed later in your return; come back to it later if it applies to you. Fill out Part V if it applies to you. You can fill in the box on the screen or by hand after you print the form. Fill in Part VI and VII if it applies to you.

SCHEDULE E - Supplemental Income - Page 1 LOCATOR: W1

This is a printable form you can submit to the IRS. Page 1 is for rent or royalty income; if you use page 1, you must also complete page 2. Be sure to answer the 'yes/no' questions on Line 2. Fill out the lines that describe the properties by hand or on the computer; if you enter them on the computer, make certain that the entry cursor does not eliminate the wording identifying the properties as A, B or C. Don't forget to fill in Line 20, Depreciation.

Your allowable loss on rental properties may be limited. If it is not, 1040Works-X automatically uses the loss calculated on Line 23 of Schedule E. If your loss is limited, you will have to prepare Form 8582 and enter the allowable loss on Line 23; (Line 23 is one of the few places in 1040Works-X where you can type over built-in formulas.)

SCHEDULE E - Supplemental Income – Page 2 LOCATOR: AE1

This is a printable form you can use to report income or losses from partnerships, estates, trusts and S-corporations. Although you may make no new entries here, the IRS wants you to complete the page anyway if you prepare page 1; the final total of all Schedule E income appears at the bottom. If you use page 2 to report other income, fill in the lines identifying the sources of gains or losses. You must distinguish between types of income and loss, and the new IRS loss limitations may apply. Part V, for depreciation, can be filled in on the computer or by hand after you print the form; it does not affect the computations on page 1.

FORM 1040 REPORT - Side One LOCATOR: AL1

This is a worksheet. By the time you complete all the preceding forms that apply to you, Form 1040 should be filled out. There are exceptions, however. Calculations for taxable income from Social Security depend on information from this form, so they won't be completed until this form is otherwise complete. Data on childcare expenses that you haven't yet figured may also affect this page.

Always recalculate this worksheet four times when you are done. You can be certain that the Report has done its work when the numbers on it remain the same after two or more recalculations. Also examine the totals to make sure they are consistent with the numbers you expect to be there. Recalculate again if they are not. When printing, remember that this worksheet requires two pieces of paper.

SCHEDULE A - Itemized Deductions LOCATOR: AO1

(Note: If you are transferring data from another software package, read the INTERFACE.DOCS file on the 1040Works-X disk before filling out this Schedule.)

This is a computer-generated form. After you fill in the header, press <oa-K> before you start. Your paycheck deductions for state and local income taxes will be entered automatically. Then enter the totals for other deductions on the appropriate lines.

Note: Almost all cells in Schedule A contain formulas. Most of the formulas manage the transfer of data from other financial management programs. Do not make any entries on Schedule A if you plan to import data electronically from a program such as Quicken, On Balance, or the 1040Works-X Organizer. If you are not importing data, you should ignore the formulas and enter data in any cell that will accept it.

If you must list the sources of your deductions, you can type in the sources on the screen or write them in afterward. If you have more entries than can fit on the available lines, insert a note referring to a separate statement and enter only the total recorded on that statement in the numbers column. Don't forget to prepare the statement and include it with your return.

FORM 2441 - Child/Dependent Care Credit LOCATOR: AQ1

This is a two-page form that you can print and submit to the IRS. Data on page 2 of the form may affect the outcome of page 1. Limitations on this credit apply for people who owe Alternative Minimum Tax; this module does NOT calculate those limitations.

FORM 6251 - Alternative Minimum Tax LOCATOR:AV1

This is a printable form you can submit to the IRS. You must activate the Form Selector in the Notes area to advance totals from this form to Form 1040. Unless you have income in excess of $50,000 and considerable so-called "tax-preference" income, this form is unlikely to apply to you. If you think it might apply, fill it in without entering '1' in the Form Selector. 1040Works-X will generate the Alternative Minimum Tax computation. Then finish the rest of the module, since this form requires data from the final Report screen. Finally, recalculate this form. If you find you must pay Alternative Minimum Tax, go ahead and activate this form by putting the number "1" in the Form Selector cell.

FORM 1040 Report - Side Two LOCATOR: AY1

By the time you have completed all the preceding forms that apply to you, Form 1040 should be partly filled out. Many report entries are automatic; several require new data that you must enter. Make sure every block that applies to you is complete.

NOTE: The standard deduction now differs for people in different circumstances; primarily for dependent children, elderly, and blind people. If you qualify for the special deductions, complete the worksheet on FORM.8615.8814.

When you complete Form 1040 Side Two, 1040Works-X will assume that you want any overpayment of taxes returned to you. If not, enter the amount you want the IRS to apply against next year's taxes and recalculate; the Refund line will adjust to compensate.

Remember to double-check the numbers on the Report by recalculating the spreadsheet three times after you are finished (to pick up any chain calculations that may not have been completed). If numbers on the Report page change when you recalculate, recalculate again. When printing, be aware that this worksheet requires more than a single piece of paper.

Instructions for MODULE.BUSI

MODULE.BUSI contains Schedules C and F for people with businesses or farms. You may make multiple copies of this module if you have several businesses; give each copy a unique name. You must manually transfer results to the Data Transfer Worksheet (SCREEN 3) of MODULE.X.

SCHEDULE C - Business or Profession **LOCATOR: D1**

This is a printable form you can submit to the IRS. Start by putting your name and Social Security number in the header. It may be more convenient to fill in the lettered questions A through G by hand after you print the form. Answer questions H and I (which require a 'yes' or 'no') on the computer and fill in the box for question J.

1040Works-X cannot calculate Part I accurately until you complete Part III (on page 2). Don't forget the check boxes at the bottom of Part II. When you are finished, recalculate to make certain that the final total is reported in the Results area at the top of Column A. The data there should be transferred to the Data Transfer Worksheet (SCREEN 3) of MODULE.X. Macros can help with this transfer; see Appendix A.

SCHEDULE F - Farm Income **LOCATOR: J1**

This is a two-page form you can submit to the IRS, although you need not send the IRS the second page if you do not use the accrual method of accounting.

Start by putting your name and Social Security number in the header. You may find it easier to fill in questions A through G by hand after you print the form.

Fill in your Employer Identification Number on the computer and answer the two 'yes/no' questions by typing 'yes' or 'no' in their place. If you use the cash method of accounting, do Part I. Then fill out the expenses in Part II and calculate your profit or loss. If you use the accrual method of accounting, do Part III on page 2. When you are done with Part III, recalculate with <oa-K> to load the total farm income back onto page 1.

If you haven't done so already, fill in Part II and recalculate to find your gain or loss. When you are finished, recalculate again to load the number to be carried over to MODULE.X into the Results area at the top of Column A. Then copy the results into the Data Transfer Worksheet of MODULE.X. Macros can help with this transfer; see Appendix A.

Instructions for Individual Modules

SCHEDULE R - Credit for Elderly or Disabled
FILE NAME: SCHEDULE.R

This is a computer-generated form that computes the tax credit for people who are elderly or disabled. To complete Part I, enter a "1" next to the category that describes you and your tax return. If this is the first time you filed a schedule R, Part II may require a doctor's signature. To do Part III, you must complete Side One of Form 1040 first. Enter requested data in lines 11, 13a, 13b and 14, if they apply, and calculate the worksheet by pressing <oa-K>.

FORM 2106 - Employee Expenses
FILE NAME: FORM.2106.EMP

This is a computer-generated form that generates data for MODULE.X. If both spouses work and report employee expenses, create two worksheets, naming one for each spouse, and complete one for each person.

If you report automobile expenses, do Part II first, since its results contribute to Part I. Fill in the numbers step-by-step. If you fill in all sections of Part II, 1040Works-X will calculate auto expenses using both the mileage rate and actual expense methods and install the more beneficial of the two in Part I.

Starting with the 1990 tax year, most fully-depreciated vehicles can use the standard mileage rate. Check the IRS instructions because some situations require you to use the actual expense method. If you must use the actual expense method, be sure to enter a '1' in the appropriate question in the "DO THIS:" section of this form.

You cannot complete Part II, Section C until you finish Section D.

Part II, Section D requires you to use the IRS rules to determine the method of depreciation you will use, the percentage that applies for the year you are reporting, and whether there are any limitations on the credits or depreciation you are taking. 1040Works-X MODULE.4562.GEN will calculate depreciation for cars put in service for business use in 1989, 1990, or 1991.

Income data developed in this module must be entered in the

Data Entry Worksheet (SCREEN 3); expense data must be entered into Schedule A.

FORM 2119 - Sale of Your Home
FILE NAME: FORM.2119.HOUSE

Start by answering the questions on the worksheet below the opening screen. If you already bought another primary residence, answer '1' to the first question. If you have not yet bought a new residence, but plan to do so within the replacement period, answer '1' to the second question and 'Ø' to the first. The first two questions cannot both be answered '1'.

Now go to the tax form. Enter your address at the top of the form if you do not need to file a Form 1040 or are not filing this form with your 1040. You and your spouse must sign and date the bottom of the form.

Remember to answer the yes/no question on Line 2 even though you answered it in the worksheet.

Answer the questions in Part III if you are at least 55 years old and elect to take the one-time exclusion. If you take this exclusion, be certain that you enter a '1' in the appropriate cell in the worksheet.

Fill in all the applicable user-enterable cells. When you are done, recalculate one more time (<oa-K>). Then go to the beginning of the form and transfer the amount in cell D7 to the appropriate line on Schedule D.

FORM 2210 - Underpayment of Estimated Tax
FILE NAME: FORM.2210

See the file A.READ.ME for information about filling out Form 2210.

FORM 3903 - Moving Expense
FILE NAME: FORM.3903.MOVE

Check the question in the Notes at the top of the module. Be sure to answer the questions at Line 1 and Line 2 on the form, then check the result in Line 3 against the limitation on the form. If you are under the limit, you cannot file this form.

Fill in the user-enterable information. For Lines 14 and 15, you may enter an "X", using <oa-U> to edit the line. Alternatively, write in the "X" manually after you print the form.

After the form is complete, recalculate one more time with <oa-K> and transfer the amount at 'REPORT' in the Notes section at the top of the module to Schedule A, Line 19.

FORM 4562 - Depreciation
FILE NAMES: FORM.4562.GEN; FORM.4562.RE

These are worksheets. FORM.4562.GEN uses the IRS's Modified Accelerated Depreciation Rules (MACRS) to compute the deduction for property that is depreciated over 3 to 20 years. The form offers a separate section for "listed property" such as cars and computers.

FORM.4562.RE computes the deduction for real estate.

The IRS generally requires that all the property in each class (3-year, 5-year, etc.) be depreciated the same way, so you will probably want to group all like property and prepare a worksheet for each group of property. The worksheets calculate your depreciation deduction for this year and future years, so save the results for future years. Be sure to check IRS rules that may restrict you to straight-line (S/L) depreciation methods.

Each module includes a section for identifying the property in question; enter a few words that identify the property. The depreciation worksheets have room for several types of information that might affect the reportable value of your property; they are also keyed to columns on the IRS form. Different categories apply to different kinds of property. Refer to the IRS tax instruction booklet or a commercial tax guide (or see how you handled similar calculations on last year's tax return) to decide which apply.

After you enter the necessary cost figures, calculate twice, using the <oa-K> command. The chart below the instructions will show you the depreciation deduction for each year.

Data from the worksheets should be copied manually onto the IRS Form 4562 and submitted with your tax return. Information developed on Form 4562 is reported with the business activity involved (for rental property, on Schedule E; for a business you own, on Schedule C; and so on). Complete the depreciation calculations before you get too far into the module on which you report your business income.

FORM 8283 - Non-Cash Charitable Contributions
FILE NAME: FORM.8283

You must include this computer-generated form with your tax return if you claim more than $500 in non-cash charitable deductions. This form is informational; you do not transfer the data on this form onto any other form.

Note that the 1040Works-X copy of this form is three pages long, one page longer than the IRS version; be certain to print all three pages.

FORM 8582 - Passive Loss Limitations
FILE NAME: FORM.8582.LOSS

This is a computer generated form, with six integrated worksheets. (We advise you to have the IRS instructions for this form on hand.)

To complete the form, go to Worksheet One and Worksheet Two and enter the losses for each of your passive or real estate activities. Specify with a code number (some are suggested) the forms you will use to report the losses. When all the losses are entered, recalculate twice.

Now move one screen to the right, to Form 8582. If your losses from passive activities exceed your gains, a '1' will appear in the top line in the Notes area, and you should prepare Form 8582. First, however, you must complete Side One of Form 1040, omitting any passive losses. When you have done that, you will find your Modified Adjusted Gross Income in the Notes area above Form 1040 Side One. Copy that number down and enter it in the Notes area over Form 8582.

Answer the other questions in the Notes area, and then complete the form. When you are finished, recalculate one more time and go to Worksheet Five, three screens to your right. The allowed and unallowed losses will be identified there next to the code number of the form on which they appear. Copy the data (or print it using the <oa-H> command), and enter the allowed loss on each of the schedules and forms where they are required.

This module includes an additional worksheet for distributing losses among several forms. Print a copy of Form 8582 to file with the IRS. You may also want to print the intermediate worksheets for your files.

FORM.8582.CR - Passive Activity Loss Credits
FILE NAME: FORM.8582.CR

This is a computer generated form with nine integrated worksheets. Refer to the IRS instructions for this form for specific information about the data that goes in each line of the form. New this year is a section and worksheet for low-income housing credit for property placed in service after 1989.

To complete the form, enter the appropriate information into Worksheets One through Four. Be sure to enter any credits from passive activities disallowed for prior years and carried forward to this year. Use Worksheet Seven of last year's Form 8582-CR to find these credits. Use a code number (some are suggested in the Notes area) to designate the forms you will use to report the credit. Recalculate twice after you enter all the credits.

Now move one screen to the right to Form 8582-CR. Enter the information required in the "DO THIS:" section above page one of the form. Read the notes; they point out lines you may need to fill in.

Recalculate once more and go to Worksheets Five through Nine to the right. 1040Works summarizes the allowed and disallowed credits in Worksheet Nine. Copy the data (or print it using the <oa-H> hard-copy command), and enter the information into the appropriate 1040Works forms and schedules.

Print Form 8582-CR to file with the IRS. You may also want to print the worksheets for your records.

FORM 8606 - Nondeductible IRA Contribution
FILE NAME: FORM.8606.IRA

This is a combined worksheet and computer-generated form you can submit to the IRS. First complete MODULE.X as far as Form 1040 Side One (SCREEN 13). Then go back to the IRA deduction area of the Personal Data Worksheet (SCREEN 1) to see if you can use the worksheet there, or whether you must transfer data to this module.

If you must use FORM.8606.IRA, copy the data above the IRA worksheet in MODULE.X (use AppleWorks' <oa-H> command to print a copy of the appropriate screen), load in FORM.8606.IRA, and enter the data there. Recalculate three times. The worksheet beneath will tell you whether you must use Form 8606 to report nondeductible IRA contributions, and compute the amount that is deductible.

The result to enter on Form 1040 Side One (SCREEN 13) appears in the Notes area above the Worksheet. Before you enter the result, go to the right and complete the Form(s) 8606 for yourself and/or your spouse (if applicable). You need NOT sign and date this form; signatures are only required from people not filing a tax return.

FORM 8615 - Children's Tax Computation
FILE NAME: FORM.8615.8814

This module performs three different but related computations. First, it is a worksheet that calculates the allowable standard deduction for anyone who can be taken as a dependent on another person's tax return. That applies to dependent parents as well as children. Second, it is a computer-generated form with a related worksheet that computes the tax for children under age 14 with investment income of $1,100 or more. (Under the 1986 tax law, such income must be taxed at the parent's tax rate.) Third, this module computes and generates Form 8814, for parents who report their child's income on their tax return.

To do the standard deduction worksheet, prepare the dependent's return up to Line 32 of Form 1040 Side Two (SCREEN 15 of MODULE.X). You must know the dependent's earned income to do the worksheet. Enter the required information, recalculate and transfer the result to Line 34 of 1040 Side Two (SCREEN 15) of the dependent's tax return.

To prepare Form 8615, you must first complete the parent's tax return. Then complete the returns through Line 36, Form 1040 Side Two for all children who will use Forms 8615. Enter the required information on the Form 8615 Worksheet. Calculate four times to prepare Form 8615. Transfer the result you find in the Notes area over Form 8615 to the dependent's Form 1040 Side Two (SCREEN 15).

This form now reflects the impact of capital gains on your child's income and taxes. Starting this year you must enter into Worksheet Two of Form 8615 the portion of the child's and parents' income that is attributable to capital gains. (That value comes from Line 20 of Schedule D.) Thus, if you have capital gains, you will have to prepare a Schedule D up to Line 20 before completing Form 8615. IRS Publication 929 has useful information about using Schedule D.

NOTE: This form calculates parent's tax correctly only if the parent's income is over $3,000. Children's tax is correct at any amount.

FORM 8814 - Reporting Child's Tax on Parent's Return
FILENAME: FORM.8615.8814

To use Form 8814, all the child's income must be from interest or dividends, and must be over $500 but less than $5,000. There are other limitations; see the IRS-published form for more details. The results from this form must be entered on 1040 Side One (SCREEN 10) and Side Two (SCREEN 15) of Form 1040.

FORM 8829 - Office at Home
FILE NAME: FORM.8829

This form is new for 1991. You must file this form if you take a deduction for using your home in your business. Be sure to read the IRS instructions for this form.

Enter the information required in the Notes section. In cell E7 enter the number of the month your home was first used in your business in 1991. ("1" for January, "2" for February, etc.) If you used your house for your business prior to 1991 but after 1986, enter "13". If you first used your home for your business prior to 1987, see IRS Publication 534 to find the proper percentage to enter as a decimal in cell E7. For example, if the percentage is 1.456, enter .01456.

Enter the required information into this module and recalculate three times. Then copy your deductions from the Notes section to the appropriate places in Schedule C and Form 4684 if you use it.

FORM W-4 - Employee Withholding Allowance
FILE NAME: FORM.W4

This module contains a worksheet that completes Form W-4, the form that determines the amount of Income Tax withheld from your paycheck.

The module consists of three sections, a Personal Data Worksheet, a Personal Allowance Worksheet, and a Deductions and Adjustment Worksheet. Answer the questions in all three sections and print the form. Copy the results onto the W-4 Form supplied by your employer.

PENSION

This is a worksheet you can use to determine the taxability of your pension receipts. The IRS recently changed its requirements for determining the non-taxable portion of pension and annuity payments for people who received their first payments after mid-1986. This worksheet can help you compute the taxability of your pension payments.

Hints and Tips

Getting Help

Tax templates generate two types of questions: (a) Questions about the operation of a template, and (b) Questions about tax law and your individual tax situation. The National AppleWorks Users Group wants to ensure that you know how to use these templates, but the group cannot provide advice or information about tax law or your individual circumstances.

1040Works-X users can send their questions about the operation of these templates to:

Dan Verkade
51 Bowen Rd.
Perris, CA 92571

Or call our 1040Works-X support number, (714) 943-5500. We will return your call if we're not immediately available; please leave an evening number if you reach an answering system.

Troubleshooting

Symptom	Probable Fix
Can't enter data.	Press <oa-U> before entering data.
Extra column of letters.	Scroll past them and return.
No totals on Form 1040	Enter '1' in the Form Selector.
"80N" on printout.	Change printer interface card setting.
Prints entire template.	Select "Block" after issuing <oa-P>.
Macros don't work.	Use "Macro Options" to change the Task File.
Disk full message.	Use another disk to store files.
Desktop memory full message.	Remove some files from the desktop.

Hints and Tips

Multiple calculations: If you press <oa-K> two or more times, AppleWorks will do two or more calculations without pausing for new instructions.

Windows: You can use AppleWorks' "window" capability to display two "views" of a template simultaneously. That lets you watch the effect of your changes on another part of the template. For example, go to the tax calculation area in MODULE.X, position it on the lower half of the screen, put the cursor half way up the screen, and press <oa-W>. Choose "Top and Bottom". The screen will split. Now use <oa-J> to get to the top half, move to another part of your tax return, change a number there, and recalculate. You will see the numbers change in the tax calculation area. To go to the bottom window, press <oa-J> again. To return to a single screen, enter <oa-W> and choose "One." Better yet, use windows to display the Readout area in cell BL95.

Annual Updates

The tax laws change each year and NAUG will release a new edition of 1040Works-X annually. People who bought the program this year are eligible for a discount in future years. If you bought the program directly from NAUG, you are already a registered user; we will keep you informed as plans for 1992 develop. 1040Works-X users who purchased the program from other dealers must return the registration card included in their packet. All users should send change of address notices to:

1040Works-X Updates
National AppleWorks Users Group
Box 87453
Canton, Michigan 48187

NAUG will mail update notices and reordering instructions immediately after Thanksgiving.

Copy Protection

1040Works-X is copyrighted but not copy protected. Please do not share your copy of 1040Works-X with others. The National AppleWorks Users Group has kept the cost of 1040Works-X low by basing it on the AppleWorks' spreadsheet, rather than coding new software from scratch; we believe buyers appreciate its value. But products like this can only be priced inexpensively if the costs can be spread across a large number of buyers. If you appreciate 1040Works-X's low price, recommend it to your friends, but please don't give it to them.

Thanks to...

Our thanks to this year's testers and advisers, including T.C. Austin; Marvin Dean; James Harper; Terry Higgins; Howard Katz; Peter A. Lewis; Anthony Mattern; William Neef; Will Nelken, and Richard Williams, and to the many users who offered constructive suggestions for improving our software. Thanks to Warren Williams and Cathleen Merritt at NAUG for their suggestions and editorial assistance. And our thanks to Nanette Luoma for doing the design and layout of this manual.

Appendix A - Using Macros

Macros let you perform the work of many keystrokes with only one keypress combination. For example, a macro included with 1040Works-X takes you from anywhere in the program to your 1040 Form in one keystroke.

1040Works-X includes macros that work with TimeOut Ultra-Macros to make it easier to use the templates in this package. 1040Works-X owners who use UltraMacros-enhanced copies of AppleWorks can use and modify the macros included on these disks.

1040Works-X also includes TaskMaster, a "run-time" version of UltraMacros that lets all AppleWorks 2.0 and later owners use, but not modify, the macros provided with these templates.

1040Works-X no longer supports earlier macro programs such as KeyPlayer, AutoWorks, MacroWorks, or Super MacroWorks. If you bought 1040Works-X in previous years, you can try using those macros. However, NAUG neither guarantees their functionality nor supports their use. If you use AppleWorks 2.0 or later, we encourage you to use the macros we provide on this year's disk.

If You Own UltraMacros

1040Works-X includes macros for different versions of Apple-Works. If you want to customize the macros for AppleWorks 2.0, load the file MACROSX.20 onto the desktop, customize the macros, and use the Macro Compiler to compile your new macro set. AppleWorks 3.0 users should load the MACROSX.30 file onto the desktop. 5.25-inch disk users will find these files on Side One of the 1040Works-X Utilities Disk. We developed these macros using UltraMacros 3.1; you should use that version of Ultra-Macros if you recompile the 1040Works-X macros.

We also included Task Files that make it easy to use the macros on this disk. Proceed as follows if you own UltraMacros and do not want to customize the 1040Works-X macros:

1. Use a utility program to delete the file FASTCOPY from your AppleWorks Startup Disk. That will give you some extra space on the disk.

2. AppleWorks 2.0 and 2.1 users: Copy the file

MACROSX.20.TASK onto your AppleWorks Startup Disk.

AppleWorks 3.0 users: Copy the file MACROSX.30.TASK onto your AppleWorks Startup Disk.

3. Issue an <oa-esc> to access the TimeOut Menu and select Macro Options.
4. From the Macro Options Menu, select choice #1, "Launch a new task".
5. Select the Task File that you copied onto your AppleWorks disk in step #1 above.

If You Do Not Own UltraMacros

Here is how to use the power of macros even if you do not own UltraMacros. The process we describe installs a run-time version of UltraMacros and the 1040Works-X macros onto your Apple-Works Startup Disk. Proceed as follows:

1. Use a utility program to delete the file FASTCOPY from your AppleWorks Startup Disk.
2. Insert the 3.5-inch 1040Works-X Disk or Side One of the 5.25-inch Utilities Disk into the drive and boot your system. You will see the 1040Works-X opening screen. Press the Return Key to continue the installation.
3. The TaskMaster installation screen will appear. Press <I> to continue the installation.
4. Indicate which version of AppleWorks you use and follow the on-screen prompt by putting your AppleWorks Startup Disk in the drive and pressing the Return Key.
5. If you changed the volume name of your Startup Disk from /APPLEWORKS or if AppleWorks is located in a subdirectory, TaskMaster will prompt you for the pathname where AppleWorks is located. Type in the name and press Return.

   If the volume name of your AppleWorks Startup Disk is /APPLEWORKS and you still get the prompt for a pathname, something is wrong. Check if the file named APLWORKS. SYS-

TEM is on the Startup Disk; TaskMaster will not load if you changed the name of that file. There is one exception: If you installed UltraMacros onto your disk, this file was renamed to APLWORKS.SYS. That is fine as long as the file ULTRA.SYSTEM is present on the disk. If you are in doubt, make a fresh working copy of your AppleWorks Startup Disk.

6. The installation program will now install the run-time version of UltraMacros which contains all the macros that are appropriate for your system. The installation program will tell you the name of the file it installed on your disk. Make a note of that name.
7. Put your 1040Works-X disk back into the drive and press Return. The installation menu will appear. You can either press <Q> to quit to BASIC or reboot to start AppleWorks.
8. Insert your newly modified AppleWorks Startup Disk in the drive and reboot your computer.

Be sure to see the file A.READ.ME for any last minute information about the macros.

Possible Errors When Installing TaskMaster

The 1040Works-X Installer performs two functions:

1. It renames APLWORKS.SYSTEM to APLWORKS.SYS.
2. It copies the correct TaskMaster file onto your AppleWorks Startup Disk. If you do not want to use the Installer, use a file utility program to rename APLWORKS.SYSTEM to APLWORKS.SYS. Then copy the proper file (see the chart on page 46) from your 1040Works Utilities Disk onto your AppleWorks Startup Disk.

Users can encounter the following two problems when installing TaskMaster:

1. Insufficient space on your AppleWorks disk to accommodate TaskMaster. If you get a disk full error, make certain you deleted FASTCOPY. If you already deleted FASTCOPY, you will have to remove at least one other file. We suggest you

delete SEG.PR, the file AppleWorks uses when you change your printer settings.

When the "disk full" error occurs, you will be at the BASIC prompt ("]"). Follow these instructions:

A. Type DELETE SEG.PR and press the Return Key.

B. Type RENAME APLWORKS.SYS,APLWORKS.SYSTEM.

C. Return to step #1 on page 45 and repeat the installation procedure.

2. An incompatibility with SpellCopy causes two problems:

A. TaskMaster will not install the correct file because SpellCopy renames APLWORKS.SYSTEM to APLWORKS.SYS. To correct this, perform parts B and C of step #1 above.

B. SpellCopy-enhanced copies of AppleWorks will launch SpellCopy and not TaskMaster at bootup. If you installed SpellCopy on your working AppleWorks disk, quit AppleWorks to access ProDOS. If you use ProDOS 1.9, you will see a list of the System Files on your disk. Select the file that starts with "TASK" to launch TaskMaster.

If you use an earlier version of ProDOS, enter "/APPLEWORKS" in response to the "ENTER PREFIX (PRESS "RETURN" TO ACCEPT)" prompt. Then enter either TASKX.20.SYSTEM (if you use AppleWorks 2.x) or TASKX.30.SYSTEM (if you use AppleWorks 3.0) in response to the "ENTER PATHNAME OF NEXT APPLICATIONS" prompt.

File Names

Here are the files TaskMaster installs on your copy of AppleWorks:

	UltraMacros Installed	UltraMacros Not Installed
AppleWorks 2.x	MacrosX.20.Task	TaskX.20.System
AppleWorks 3.0	MacrosX.30.Task	TaskX.30.System

Using the Macros

It is easy to understand and use the macros you installed. The table on the following page lists the letter, number, or keys you press in conjunction with the Solid-Apple Key (that's the Option key for IIGS users). For example, "<sa-P>" means, "Hold down the Solid-Apple key and press the letter 'P'."

The best way to see what happens is to run a few macros. Do this:

1. Load the file MODULE.X onto the desktop.
2. Press <sa-K>. AppleWorks will recalculate four times.
3. Press <sa-ctrl-A> to go to Schedule A.
4. Press <sa-H> to return to the top of MODULE.X.

Experiment with these macros and others until you get comfortable.

WORKSHEETX

This file works in conjunction with the 1040Works-X macros. It accepts your name and social security number, gathers the results from MODULE.X, MODULE.BUSI, FORM.2106.EMP and the Organizer. It then transfers the data to the appropriate places in MODULE.X. It also prints your name and social security number in all the appropriate locations in MODULE.X, MODULE.BUSI, SCHEDULE.D1 and SCHEDULE.R. In the remaining modules, it inserts your name and social security number in the one IRS form on your screen. For more information, see the instructions for macros <sa-E>, <sa-I>, <sa-N> and <sa-U> in this section and in the Guide to Macros on page 49.

The New Macros

Start by loading the WORKSHEETX file on the AppleWorks desktop.

Here is a list of the new and changed macros; note that some of these macros only work with AppleWorks 3.0:

<sa-E>: Exports data from MODULE.BUSI, FORM.2106.EMP, and ORGANIZER into WORKSHEETX. To use the macro, issue a <sa-E> with any of the above modules on the screen.

<sa-I>: Imports data (but not your name and social security number) from WORKSHEETX into MODULE.X.

<sa-K>: Recalculates the current spreadsheet four times. (Previously <sa-K> recalculated three times.)

<sa-M> (AW 3.0 only): Displays a menu of most of the forms and schedules in 1040Works-X and lets you navigate to the form of your choice. The module containing the form or schedule you select must be on the desktop.

<sa-N>: Puts your name and social security number into all the forms in MODULE.X and MODULE.BUSI. In the other modules, it puts your name and social security number in the form that is on your screen. You must first type your name and social security number into WORKSHEETX. (Be sure you enter your social security number as a label.) WORKSHEETX must be on the desktop for this macro to function. This replaces last year's method that used <sa-I> and <sa-ctrl-I>.

<sa-T>: Performs summary calculations in the ORGANIZER.

<sa-U>: Updates the current module by importing the data from WORKSHEETX. <sa-U> then recalculates the current worksheet and exports the appropriate revised data back into WORKSHEETX.

<sa-Y>: Marks the current cell.

<sa-Z>: Returns to the marked cell.

Other Notes About Macros

Look in the files MACROSX.20 (for AppleWorks 2.x) and MACROSX.30 (for AppleWorks 3.0) for the macros in the Task Files.

For TimeOut owners: The file TO.HELP is a help screen for the macros. Copy this file onto your TimeOut applications disk or load it using your TimeOut Utilities. Select it from the TimeOut Menu and use the up and down arrows to move through the screen.

For Apple IIGS owners: If you use the Finder to launch applications and modified your copy of AppleWorks with TaskMaster, be sure to click on the TaskMaster file (MACROS.?0.TASK or TASK.?0.SYSTEM), not the AppleWorks system file.

Guide to 1040Works-X Macros

<sa-A>:	Saves (Archives) a file to disk without asking permission to remove the old file. Works only with AppleWorks 3.0.
<sa-E>:	Exports data from the current file into the file WORKSHEETX.
<sa-F>:	Goes to the AppleWorks Add Files Menu.
<sa-H>:	Goes to the beginning (Head) of any module.
<sa-I>:	Imports the appropriate data from the file WORKSHEETX into the current file.
<sa-K>:	Recalculates four times.
<sa-L>:	Installs and removes label bars over forms.
<sa-M>:	Menus of all forms and schedules. Works only with AppleWorks 3.0.
<sa-N>:	Enters your name and social security number into the current file. First you must enter your name and social security into the appropriate cells of WORKSHEETX.
<sa-O>:	Toggles between two modules on the desktop.
<sa-P>:	Prints an entire single page form using the current printer. Start with the cursor on the top left corner of the print-area (row 13) of the form.
<sa-R>:	Removes labels over Schedule D columns. See <sa-ctrl-W>.
<sa-T>:	Performs all necessary calculations in the Organizer.
<sa-U>:	Updates WORKSHEETX. It imports data from WORKSHEETX into the current file, recalculates, then exports the current file results to WORKSHEETX.
<sa-W>:	Installs the tax readout window.
<sa-Y>:	Marks the current cell.
<sa-Z>:	"Zips" to the marked cell.

<sa-esc>:	Goes to the top of a module; same as <sa-H>.
<sa-ctrl-A>:	Goes to Schedule A.
<sa-ctrl-B>:	Goes to Schedule B.
<sa-ctrl-C>:	Goes to Schedule C.
<sa-ctrl-D>:	Goes to Schedule D.
<sa-ctrl-E>:	Goes to Schedule E.
<sa-ctrl-F>:	Goes to Schedule F.
<sa-ctrl-R>:	Goes to 1040 Side One adjusted gross income Report.
<sa-ctrl-S>:	Goes to Schedule SE.
<sa-ctrl-T>:	Goes to 1040 Side Two tax report.
<sa-ctrl-U>:	Goes to Form 2441
<sa-ctrl-V>:	Goes to Form 6251
<sa-ctrl-W>:	Installs headings on gain/loss area of Schedule D.
<sa-right>:	To left column, form to Right
<sa-left>:	To left column, form to Left

Guide to the Macros Files

Here is a description of the different files on the 1040Works-X disks that either install, run, or contain the macros:

File Name	Function
ProDOS	ProDOS version 1.9; operating system.
BASIC.SYSTEM	Applesoft BASIC; required to run the installation programs.
STARTUP	1040Works-X TaskMaster installation menu.
TASK.INSTALL	TaskMaster installation program.
MACRO.INFO	UltraMacros promotion.
SET.BLINK	BASIC program that changes the cursor blink rate.
MACROSX.20	Word processor file containing macros ready to be compiled by UltraMacros for AppleWorks 2.0 and 2.1.
MACROSX.30	Word processor file containing macros ready to be compiled by UltraMacros for AppleWorks 3.0.
MACROSX.20.TASK	UltraMacros Task File for AppleWorks 2.0 and 2.1.
MACROSX.30.TASK	UltraMacros Task File for AppleWorks 3.0.
TASKX.20.SYSTEM	TaskMaster and macros for AppleWorks 2.0 and 2.1.
TASKX.30.SYSTEM	TaskMaster and macros for AppleWorks 3.0.

Appendix B
Financial Organizer

The Financial Organizer (File Name: ORGANIZER) collects your tax-related expenses, lets you assign a different category number to each expense and provides totals for each category. The Organizer can also provide category summaries for easy transfer to your tax forms. You can also use the Organizer to sort entries by date, check number, type of expenditure, or the amount of each item.

At tax time, many taxpayers look through their checkbooks and other financial records, looking for potential deductions and noting them on separate lists for each category (medical, taxes, charity, etc.). That takes a fair amount of time. Instead, you can use the Financial Organizer to collect that information. Sit down with the checkbook and type the tax-related items into the Organizer. Assign each category a code number. You can enter the numbers as you complete each entry or go through the list and put them in when you are done. Then go to the Totalizer section near the bottom of the Organizer and enter the number for a category. The Organizer will report the total for that category. The Organizer will also install the totals in the Report section. If you use the coding already built into the Organizer, you can transfer the results directly into a 1040Works-X module via the Transfer Port.

The Organizer has seven sections, three of which appear at the top of the Organizer spreadsheet. These sections offer places for you to make NEW ENTRIES (such as checks written for tax-deductible expenses), to make ADJUSTMENTS that modify transactions (if necessary), and a section that SELECTS CATEGORIES to subtotal.

Three sections are at the bottom of the Organizer. They provide a key that explains the various Organizer columns (the Glossary), a section that totals any particular expense category you select (the Totalizer) and an area that summarizes all the totals (the Report). Beneath those is a location for installing a Transfer Port, which you can tailor to your tax situation. (See Data Transfer, Page 56.)

New Entries Section

Use the New Entries Section to record tax-related data. This section accommodates the date, the number of your check or credit account (if you are recording an expense), a number for your checking account (if you are recording a deposit), some identification of the person you paid, the amount of money involved, and a code number. You assign a different code number to each type of transaction; you use these codes later to reorganize and recover the information you need.

If you use the Organizer to collect information for itemized deductions, you can make it easier to transfer data to the tax forms by using the numbers already in the Report section.

Adjustments Section

Use the Adjustments Section (in Columns F through J) to enter any adjustments to the original entries. For example, if you pay a doctor bill and then are partially reimbursed by your health insurance, you would record the reimbursement here. The Organizer will automatically subtract the reimbursement from the appropriate category and report the correct amount of the deduction.

Category Selector Section

The third section (in Columns H through M) is the Category Selector Section. You don't need to make any entries here. You use this section to produce subtotals of any categories you request.

Glossary (At Column A, Row 97; for quick reference, go to Column A and press <oa-8>.): The Glossary explains how the Organizer uses each column.

Totalizer (At Column L, Row 100; for quick reference, go to Column L and press <oa-7>.): The Totalizer stores the totals for any categories you specify. To use the Totalizer, enter the code number of the category you want to total and press <oa-K>. The total for that category appears in the cell identified as TOTAL.

Report (At Column I, Row 104; for quick reference, go to Column I and press <oa-8>.): The Report section (below the Totalizer) records the result of each category. It includes suggested categories that match the deductions on Schedule A. You can use those categories if you want, or change them to suit your needs.

To change the categories, simply type in new category names in place of the existing ones. The category descriptions you use are up to you.

We suggest that you print the Report section before you begin, to remind yourself of the numbers assigned to each category.

Entering Data in the Data Collector

Enter the date in Columns A and B; the month goes in Column A, in numeric form (Jan=1, Feb=2, and so on). Account identifications go in Columns C, D and E. If you are entering an amount from a check, put the number of the check in Column C. If the amount is from a credit card purchase, assign the credit card account a number and enter it in Column D. If you are recording deposits, enter a "1" in Column E. (If you have more than one bank account, you could assign a different number to each.) In Column F, identify the person or business you paid (or, if it is a deposit, who paid you).

You might also want to put in a word describing the purpose of the expenditure. Make up simple abbreviations and you can pack more data into a short line. (Incidentally, you can make your entries clearer by entering a space first, to separate the words from the column to their left. To do that, enter <Shift-"> first, then press the Space Bar and begin your entry. The carat mark (^) in the Payer/Payee column is a prompt that shows the best place to start an entry.) Enter the amount in Column G, rounded to the nearest whole dollar. Column H is for the code number that identifies your expense categories.

About Codes

You must identify each category you want to total with a code. Assign a different code number to each tax category you will total. (We recommend that you use the codes provided in the Report section.) You can enter the code either as you make your entries or you can enter the code numbers later, whichever is easier.

Note

If you enter both expenses and income in a single Organizer file, remember to assign a code to the income items and make certain that the code you assign is different from the code you assign to any expense items. Otherwise, the Organizer will add both the expense and income items together. An alternative is to enter a minus sign in front of each expense item. Then the Organizer will automatically subtract the expenses from the income entries.

Entering Adjustments

The Adjustments area starts at the top of the Organizer and provides a place to record transactions that modify your original entries. For example, if you pay a doctor and then are reimbursed by your medical insurance, enter the reimbursement as an adjustment. Only the balance will count as a medical expense. Enter the amount of the adjustment you want to make in Column I. In Column J, enter the source of the adjustment (your medical insurance, for example). The Organizer will make the adjustment the next time you recalculate and the result will appear in Column K.

Totaling Results

Go to the Totalizer area at the bottom of Column J. (The quick way there is to press <oa-8>.) Identify the category you want to total by its code number and press <oa-K>. The total for that category will appear in the blank below the code.

Collecting the Results

Go to the Report area (below the Totalizer). Each category that you total will be reported there permanently by its code number. Make sure you use the assigned code numbers.

Only those categories which you totalled in the Totalizer will appear in the report. To generate a complete report, you must "totalize" all the categories. The total for this report appears in cell L127 at the bottom of the report. The Control Check is in cell N127 to the right. If cell N127 is not zero, you have not totalized all your categories, or you have made a change since you last totalized all of your categories. The macro <sa-T> will totalize all 18 categories with the one keypress.

Data Transfer

If you followed the coding provided with the Organizer, you can use the Data Transfer Port to transfer your data directly into Schedule A. Categories 13-18 do not transfer into the Data Transfer Port. You can use these categories for income items.

To move the data collected in the Organizer into MODULE.X, perform these steps:

1. From the Organizer, go to cell A1 and press <oa-9>.
2. Move the cursor up four rows; "DATA TRANSFER PORT" will appear on the Edit Line.
3. Issue an Apple-C command and copy this row to the Apple-Works clipboard.
4. Bring MODULE.X on the screen. Go to cell A1 and press <oa-9>.
5. Issue an Apple-C and copy the clipboard into this row. Indicate that you want to transfer "Values only".

For more information, see the file INTERFACE.DOCS on the 1040Works disk.

Printing

There are various ways to print the contents of the Organizer. To keep a list for your permanent records, print the rows where you recorded your entries. You can also print just the summary so you can transfer that data to your tax return.

Printing the Whole Module

The Organizer will automatically print 17 characters per inch on a platen width of 8.5 inches with a paper length of 22 inches (two pages). That will accommodate the entire module.

To print the complete module, put the cursor at the upper left corner of the Organizer, press <oa-P>, specify you want to print

"All". Specify what printer you want to use, enter the date, and how many copies you want.

Resetting Print Options

If your printer does not correctly print the Organizer's special format, you should reset the print options to match the other 1040Works-X modules. That is, issue an <oa-O> and change the characters per inch to 10, the platen width to 8.0, and the page length to 11 inches.

Printing New Entries Only

Follow these steps to print the New Entries section:

1. Put the spreadsheet cursor at cell A18 of the spreadsheet (the title row for New Entries).
2. Press <oa-P> and specify that you want to print a Block.
3. Move the cursor across to cell H18 and move the cursor down to cover the last entry that you want included in the output. AppleWorks will highlight the area it will print. Then press the Return Key.
4. Select the printer you want to use, enter the date, and indicate the number of copies you want to print.

Printing Other Sections

To print the Adjustments or Selector sections, align the area you want to print on the screen, put the spreadsheet cursor at the top left hand corner of the data you want to print, and follow the procedure outlined for "Printing New Entries" above.

Rearranging Entries

It is not necessary to rearrange entries to find category totals, but some users may want to group individual types of expenses by date, alphabetize the entries, or modify the list in some other way. You can do that easily with AppleWorks' Arrange Command.

1. Save your file in case you do something wrong when you arrange the records. AppleWorks does not offer an Unarrange

Command.

2. Decide what category you want to use as the basis for rearranging the entries. You can choose anything that is represented by a column in the spreadsheet. That includes date, check number, credit card account, name of payee or payer (if you have been systematic in your entries and used the key identifying name as the first word you entered) or category of expense.
3. Move the cursor to the column containing the data you want to use as the basis for the rearranging and then to the first entry in that column.
4. Enter an <oa-A> and AppleWorks will ask you to identify which rows you want to rearrange. Use the Down-Arrow to highlight all the entries you want to rearrange. Then press the Return Key.
5. Indicate whether you want the new arrangement by number or by letter, and in what order. For numeric entries, pick "0 to 9"; for alphabetic, pick "A to Z". Press the Return Key again. The entries will be rearranged.

You can restore the entries to their original order by rearranging the rows based on the contents of Column M.

Appendix C - Memory Limits and Storing Files

1040Works-X files are relatively large. For example, MODULE.X can require more than 100K of AppleWorks desktop memory. The large size of the files can cause you both memory and storage problems. This appendix describes some possible problems and solutions.

AppleWorks 2.0 Users: Beware of the AppleWorks Bug

First, a warning: There is a bug in AppleWorks version 2.0. If you try to save a large file on a disk that lacks enough space to store the file, AppleWorks fits pieces of the file into the available space on the disk and then asks you if it is all right to remove the old file (to create more space) in order to save the current one.

Normally that's fine. But if AppleWorks has only saved a little of the current file, it can lose the rest in the process. The simple way to avoid that is to save the complete file on a different disk.

If you need to keep your files on one disk, here's what to do: When AppleWorks 2.0 asks if it is OK to remove the old file, tell AppleWorks "No". AppleWorks will stop saving the file. Now return to AppleWorks' Main Menu, select option #5 (Other Activities), select option #4 (Delete files from disk) from the Other Activities Menu, and remove the original file from the disk. That will free up space to store the current file on the disk. But save immediately, since you no longer have an original file as a backup, should your computer lose power or some other mishap occur.

Note that this bug only appears in AppleWorks 2.0. Users of other versions of AppleWorks can respond "Yes" to the "Is it OK to delete the earlier version of the file?" prompt.

Saving Module.X

MODULE.X is large compared to the total space available on a 5.25-inch disk and it will not automatically resave on the same disk. Many users have mass storage devices, such as 3.5-inch drives or hard disks, which solve the problem. However, if you work with 5.25-inch disk drives, there are several ways to make it easier to manage the storage problems caused by the size of this file.

First, if you have AppleWorks 2.1 or later, you can tell AppleWorks it is all right to erase the old file before it finishes storing the revised one. Remember not to authorize this save if you use AppleWorks 2.0.

Here are some others ways to store the file:

1. Use AppleWorks' Other Activities Menu to remove the original file before you attempt to resave the current version (as described in the preceding section).
2. Format several disks and use a fresh disk each time you save MODULE.X.
3. Use two disks and reformat the old one, using AppleWorks formatting commands each time you save to a blank one; then you have a fresh one available.
4. Some AppleWorks expansion software allows saving files across two disks. That can be cumbersome, but if you have mastered it, using segmented files will solve your storage problem.
5. Make MODULE.X smaller by blanking unused tax forms to reduce memory requirements for this module. To blank a form, put the cursor at the top left of the form, under the double-dashed line, press <oa-B>, choose "Block," move the cursor to the right until it highlights the top of the form and down until it includes the whole form, and then press the Return Key. Warning: Never delete rows or columns, or you may destroy other parts of the module.

You save 2K of desktop by blanking Schedule B and 2K for each Schedule SE. However, you may have to save the file to disk and reload before the reduction in memory will show up on the AppleWorks' desktop.

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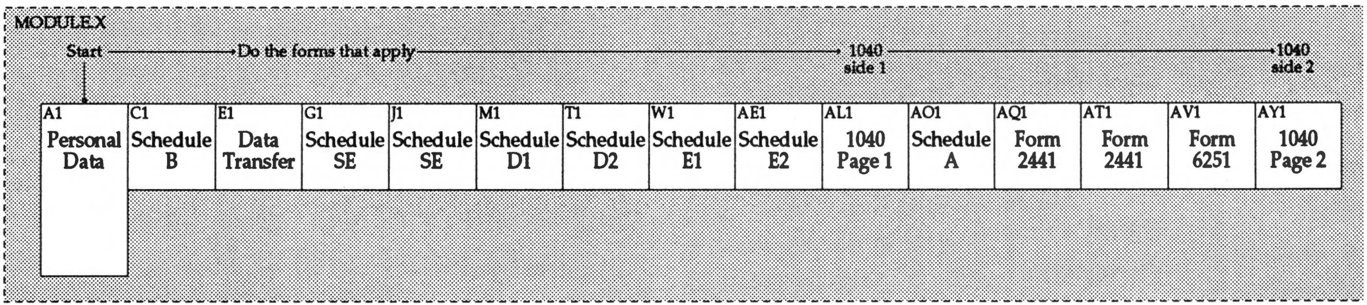
1040Works-X Map



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About NAUG

The National AppleWorks Users Group (**NAUG**) has one mission – to help AppleWorks users.

NAUG is the world's largest association of Apple II users with more than 14,000 members in the United States and 44 other countries.

NAUG members receive the ***AppleWorks Forum***, a 32-page monthly newsletter that describes tips, techniques, and hints to help users get more from AppleWorks. The ***AppleWorks Forum*** includes other articles of interest to AppleWorks users, including news of product releases and reviews of AppleWorks enhancements and AppleWorks-compatible software.

NAUG members have access to more than 150 volunteer-consultants who provide free telephone support for their fellow **NAUG** members. Members also get unlimited access to **NAUG**'s electronic bulletin board, the Electronic Forum and to **NAUG**'s Public Domain Library that contains hundreds of AppleWorks templates, files, and utility programs.

NAUG membership costs $31 per year and includes 12 issues of the ***AppleWorks Forum***.

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