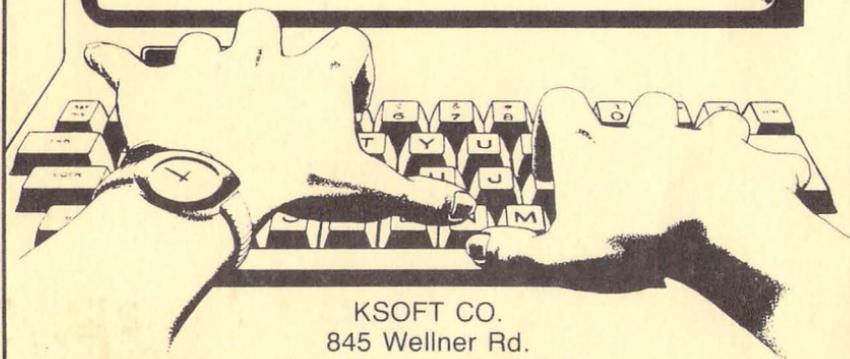


**1985  
TAX RETURN  
HELPER**

**Income Tax  
Preparation Aid  
For  
Commodore 64**

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(312) 961-1250



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# 1985 TAX RETURN HELPER

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## 1. INTRODUCTION

The TAX RETURN HELPER helps you organize tax-related data and prepare the most common tax forms and schedules. The program does all the required computations, so you have only to supply the data.

Please remember that although the TAX RETURN HELPER allows you to explore "what-if" alternatives, it will *not* provide tax advice or interpretation of tax laws. In other words, the program can help you evaluate different options, but it will not make any decision for you.

## 2. ABOUT THIS PACKAGE

The standard version disk contains two programs, "TAX 1985" and "TAX DBASE". Every tax form and schedule handled by "TAX 1985" has an associated data file on the disk. "TAX DBASE" is a data base program to create and maintain files of tax-related items; these files can be used directly by "TAX 1985".

In addition, the professional version disk contains the program "PRINT", that can print data from the files produced by "TAX 1985" directly on IRS forms. This printing process is directed by auxiliary "print control" files also provided on the disk.

We recommend that you make a backup copy of the original disk and use this backup disk for storing the files with your tax data.

### 3. GETTING STARTED

To start, type

LOAD "TAX 1985",8 (and RETURN)

After loading, type

RUN (and RETURN)

First the program asks you to specify what form you want to work with. The initial choices are: 1040-A, SCHEDULE B, SCHEDULE C, SCHEDULE D, SCHEDULE E, SCHEDULE W, SCHEDULE G, SCHEDULE SE, FORM 2441, FORM 2106, and FORM 4562. (These are data files). Now type

1040-A (and RETURN)

This contains both Form 1040 and Schedule A. After the file is read in, the program prompts you for name(s) and social security number (this should be given in the format 123-45-6789).

Next you will get on the screen a "window" into the form.

First we will explain how to scan the form and how to point to a specific line, then how to fill the form. We use 1040-A as an example; all other forms work the same way.

Because the text of some lines is abbreviated, we recommend that you have the IRS form handy for reference.

### 4. SCAN THE FORM

On the first line you see a reverse > (the cursor). Think about it as a pencil that you move over the form until it reaches the line you want to modify. You can change only the line with the cursor (the current line). To move the cursor to other lines, use the down arrow or the up arrow. Pressing the down arrow when the cursor is at the bottom of the screen makes the window "slide down".

To make the window start at a certain Line without moving the cursor, first press L (without RETURN). Then type the desired line number; for example

9A (and RETURN)

brings line 9a at the top of the window.

If you enter only a space for the line number, the window will start at the first line (following the current one) that does not have a number. Most of these are title lines for different sections of the form.

Another way of scanning the form is by using the f3 and f5 keys: f3 advances the window to the new screen (22 lines) and f5 moves the window back to the previous screen.

Scan the form by bringing different sections in the window. Note that Schedule A follows Form 1040, and that by moving the cursor down from the last line of Schedule A you get back to Form 1040. Some line numbers (7, for example) are used in both forms. When you press L followed by a line number, you get the first line (following the current one) with that number. Try to go several consecutive times to line 7 - you will alternate between line 7 in Form 1040 and line 7 in Schedule A.

## 5. FILL THE FORM

Bring the section INCOME in the window and move the cursor to line 7. To change its value, first move the cursor to the right using the right arrow. The cursor blinks to indicate that the program is waiting for your data. Then type the desired value, say

30182.50                    (and RETURN)

This value appears now in line 7 and also in line 23 (Total Income). The program has already updated all the lines affected by the changed value of line 7. Indeed, if you scan the form, you will see the same value in lines 32, 33, 35, and 37 of Form 1040. Line 4 in Schedule A has also been updated. The cursor disappears during these computations. You can interact with the program only when the cursor is present on the screen.

If after you move the cursor to the value field, you press just RETURN, then the field returns to its previous value.

Now go to line 23 and try to enter a value - you can't! The reason is that line 23 is a result line and should get a value only by computation.

If you want to make a correction, simply go back to that line and enter the new value - the program will do the rest. You can fill the form in any order.

Negative numbers should be entered only for those lines where IRS accepts a loss. For example, if in line 12 of Form 1040 you would write (243.50), then you should enter the value -243.50. If you enter a negative value for a line where a loss is not expected, the program will accept it, but it will issue a warning.

On some lines, such as 22, you may enter an explanation. These lines are identified by a ? in their explanation field. To change it, first move the cursor to the left with the left arrow. Then type your explanation; for example

GAMBLING (and RETURN)

If you use comma(,), semicolon(;), or colon(:) in an explanation, the program will transform them into spaces.

A faster way to enter values is the *data entry* mode. You get into this mode by pressing the f1 key. The blinking cursor indicates, like before, that you are expected to enter data. After you press RETURN, the blinking cursor automatically advances to the next value field you can modify. To get out of the data entry mode press f1 again. Note that whenever the cursor is blinking the program expects data, so the CRSR keys (arrows) or the other commands (Print, Save, etc.) will be ignored.

The "TAX DBASE" program (explained in Section 20) helps you create and maintain disk files of tax-related items, such as medical expenses, contributions, car expenses, etc. Each such file also keeps the total of the recorded expenses. The total can be brought in the value field of a line by using the f7 key followed by the name of the file. For example, suppose that you created a file called "MEDICINES". To bring the total from this file in line 1 of Schedule A, move the cursor to that line and then press f7. When prompted for a file name type

MEDICINES (and RETURN)

The program will look for the file, get the total and enter it as value of line 1. If the line has ? in the explanation field (like line 2C), then the name of the file you called will be entered as explanation.

You can also use "TAX DBASE" to record income from different sources, for which there is only one entry in the tax form. For example, if you have several W-2 forms, you can accumulate them in a separate file, and then use the f7 command to transfer their total to line 7 of Form 1040.

We recommend that you round off cents to the nearest whole dollar (this is accepted by IRS). For example, instead of 232.58 enter 233, and instead of 232.43 enter 232. Otherwise, some computations may be slightly affected by the limitations inherent in the C64 representation of floating-point numbers.

Sometimes you may notice a temporary "freeze" in the execution of the program, lasting for about 20 seconds. This occurs when the C64 operating system performs "garbage collection", which is one of the tasks involved in the memory management function.

When you finish entering and/or modifying the data, all the results are already in place, and all you have to do is to copy them on the IRS form. You can also print them (if you have a printer), and save the data on disk for future reference or modifications.

## **6. PRINT THE FORM (DRAFT MODE)**

To Print the entire form, just press P. This generates a draft printout on regular computer paper. The draft printout is useful to check the figures and provides a copy for your records. It cannot be sent to IRS. Printing on IRS forms is explained in Section 21.

## **7. SAVE DATA**

To Save your data, first press S. When prompted, type the desired file name; for example

1040-A/FEBR14      (and RETURN)

Pressing just RETURN means that you want to use the current file name, which is always displayed at the top of the first window. If a file with the name you specified already exists on the disk, then you will be asked to reconfirm that you intend to replace it.

You can also use the S command to transfer tax files from a disk to another.

When the save is done you will see again the first window. Later, if you want to use the file 1040-A/FEBR14, type its name when the program asks you for a form name.

## **8. NEW FORM**

When you want to work with a New form (presumably after you saved the current one), just press N. You will be prompted again for a form name. This can be a file that you saved using the S command or one of the files initially provided.

If you are not sure about what files are on the disk, supply S (the C64 symbol for disk directory) as the file name. This will display a directory listing.

## **9. CLEAR DATA AND RESTART**

If for any reason you want to start all over again with the current form, just press CLR/HOME. This sets all values to 0 and brings back the first window. A "clean copy" of the form can also be obtained by using the original file.

## **10. LIST DIRECTORY**

Because you may not remember all the names of the files you have created, it is convenient to check the disk directory without quitting the program. To obtain a directory listing just press S.

## **11. HELP**

Pressing H activates the Help command that displays a summary of all the commands.

## **12. QUIT**

To Quit the program and return to BASIC press Q. If you change your mind after Q (for example, you forgot to save), to restart the program without losing the data, type

GOTO 100            (and RETURN)

### 13. MORE ABOUT FORM 1040

The first line in Form 1040 is 1/5. The value for this line is your filing status, that is a number between 1 and 5 corresponding to the status box you check. For example, if you check box 2 (married filing joint return), then the value you enter on line 1/5 is 2. The filing status determines the value of line 25 in Schedule A. After you fill in the filing status, the program is ready to load in the tax tables for your status. These are located on the disk you bought. In case you are now working with a different disk, insert the original one back, then press RETURN when prompted.

On line 6A/B you enter the total number of boxes you check on lines 6a and 6b; this must be a number between 1 and 6.

**TAX COMPUTATION:** To compute your Tax, just press T. First the program asks if you want to use the taxable income from line 37. If your answer is Y, the program uses the tax tables or the tax rate schedule depending on your income. If your answer is negative (N), then you are asked to enter the taxable income for which you want to compute tax (based on the tax rate schedules). This feature can be used if you do income averaging or just for experimenting with different figures.

If you wish, you can directly enter the amount on line 38 without using the built-in tax computation via the T command.

**The tax computation is done only when you press T; it is not automatic with changes in the taxable income.**

### 14. MORE ABOUT SCHEDULE D

The lines in Part I and II are divided into columns. Each combination line/column is represented separately on the screen. Line 1/A means line 1/column a, 1/F means line 1/column f, and so on. The program uses the columns a, d, e, f, and g.

Entries in lines 7 and 18 should be negative (note the minus sign in their explanation).

## 15. MORE ABOUT SCHEDULE E

The lines 3 through 20 are divided into columns corresponding to properties A, B, and C. Entries in lines 29 and 34 should be negative.

## 16. MORE ABOUT SCHEDULE G

Before any tax computation is done for lines 20 through 26 you have to enter your filing status on the line following line 19. This is the same number you entered in line 1/5 on Form 1040. (1 = single, 2 = married - joint return, 3 = married - separate return, 4 = head of household, 5 = widow)

## 17. MORE ABOUT FORM 4562

In Part I, section A, there is an additional line before line 3. You should enter a value 1 for this line if the form is for a partnership or S-corporation. Otherwise, you don't need to make an entry in this line.

In Part I, section B, the value of a line corresponding to column e is used to indicate the method of figuring depreciation. A value 0 means the straight-line (SL) method. For any other method based on a percentage of the cost, enter the applicable percentage as the value of this line (for example, enter value 31 for 31%). Enter the IRS code for the method (SL, PRE, etc.) in the explanation field of this line. If you want, you can enter directly the deduction in column f and override the amount computed by the program.

In Part III, section A, use the lines corresponding to column f to enter the applicable percentage for computing the deduction. Here you have to enter a percentage even for the SL method. We have provided an additional column (/I) for the investment credit you claimed for the property. Note that both the investment credit and the Section 179 expense (column h) will be set to 0 if the business use percentage (column c) is 50 or less. As before, you can enter directly the deduction in column g.

## 18. MORE ABOUT FORM 2106

In Part II, section A, we have provided an additional line whose value should indicate whether you use the standard mileage rate or actual expenses. Enter 1 for standard rate and 2 for actual expenses. If you want to explore both options, you should do a Save before you change this line from 1 to 2 (or vice versa), because such a change will act like a Clear command.

In Part II, section B, there is an additional line in which you should enter the applicable mileage rate - 0.21, or 0.11 for a fully depreciated vehicle.

In Part II, section D, the value of a line corresponding to column c is used to indicate the method of figuring depreciation. A value 0 means the straight-line (SL) method. For any other method based on a percentage of the basis, enter the applicable percentage as the value of this line (for example, enter value 31 for 31%). Additional lines are provided for the period to be used for the SL method, and for the investment credit taken for the vehicle.

## 19. SUMMARY OF COMMANDS

the down arrow

the up arrow

the right arrow

the left arrow

follow with the value of line

follow with the explanation  
of line

L

follow with a line number

S

Save

CLR/HOME

Clear and restart

P

Print

N

New form

T

Tax computation

(only for Form 1040)

Q

Quit

f1

enter/exit data entry mode

f3

advance one screen

f5

back one screen

f7	follow with the name of a file created with TAX DBASE
H	Help
\$	List directory

Remember that to issue a command, you press only one key (without RETURN). Entering data (numbers or text) is always terminated with RETURN.

## 20. TAX DBASE

This is a data base program for building and maintaining disk files of tax-related items. These files can be directly used by the main program, "TAX 1985".

Load and run the program "TAX DBASE". First the program asks if you want to create a new file or update an existing one, then it prompts for a file name. Type, for example

CAR (and RETURN)

The screen should display a window in the file named "CAR". Initially the file is created with only one item and expands with every new item added. You can have up to 999 items.

The top of the screen always displays the name of the file and the number of items contained. At the bottom of the screen there is the running total of all the expenses. For each expense you can specify when it occurred, (12-18), what was it (car tune-up) and the amount (48.50).

TAX DBASE can also be used for many accounting and bookkeeping jobs, not necessarily related to the preparation of the tax return. For example, you can use it to balance a checkbook: just enter deposits as positive values and checks as negative values, and the total will indicate the balance.

Most commands are similar to the ones used in the main program so we will explain the ones that are different and only list the others.

- the four CRSR keys : position the cursor on the screen. Moving the cursor past the last line adds a new line (with value 0).

- f1 : starts and stops the data entry mode. Here data can be entered only in data entry mode.
- f3 : advance one screen
- f5 : go back one screen
- f7 : file call. Like in the main program, you can enter the total from another file as the value of the current line. For example, you set up files for monthly expenses and now you include them in a file for yearly expenses.
- H : Help
- D : Delete the current line
- I : Insert a new line
- P : Print
- S : Save
- CLR/HOME : Clear values
- N : New file
- S : List directory
- Q : Quit

## 21. PRINTING ON IRS FORMS

This feature is available only in the professional version. Printing on IRS forms can be done in one of the following modes:

1. Use the IRS forms directly. For this you need a friction-feed printer. Before printing a page, you will have to align the paper.
2. Use IRS forms printed on tractor-feed paper (available from commercial publishers); this paper is easier to align.
3. Use overlays. An overlay is a transparent sheet of plastic (available at most print shops), on which you can xeroxcopy an IRS form. You would let the printing program print on your regular computer paper, which needs no alignment. Then you place the page printed by the program under the overlay, and copy them. This gives the same result as printing directly on the form, but is much easier, because does not require alignment of paper.

We can provide a set of 16 printed overlays (for the 12 forms handled by "TAX 1985") for \$17 (plus \$1.50 shipping and handling).

Load and run the program "PRINT". First the program asks you what form you want to print. This should be one of the files generated by "TAX 1985" with the S(ave) command. As before, supplying \$ as a file name produces a directory listing.

After reading in the specified file, the program requests the name of a print control file that guides the printing process. The initial choices are PRINT 1040-A, PRINT B, PRINT C, PRINT D, PRINT E, PRINT W, PRINT G, PRINT SE, PRINT 2441, PRINT 2106 and PRINT 4562. These are data files provided on the original disk. To get one of these initial print control files, you can either enter its name, or just press RETURN. In the latter case, the program will select the right file for your form; for example, it will select PRINT C for a file containing your SCHEDULE C form.

To conserve memory, the main program omits some of the items not needed for computations. For example, one such item in Form 1040 is whether you want to contribute \$1 to the presidential election campaign fund. You can Add these items to the data guiding the printing program by using the A command. In response to A, the program goes through a fixed sequence of questions regarding the additional data and stores your answers. You can also use A to change some of the answers entered with a previous A command. For items that you do not want to change, just press RETURN.

After you have entered the additional information, you can Save it (along with the original print control data) into a new print file, using the S command. The program will prompt you for the name of the new print file. For example, you may add some data to the file PRINT C and save using the name PRINT C/NEW. Later, when you print again your SCHEDULE C file, supply PRINT C/NEW for the name of the print file.

You can also use the S command to save a print file, even if you do not add anything to it. This allows you to transfer print files on a different disk.

The actual Print is initiated by the P command. The printer should be set to 80 characters/line and 66 lines/page. These are the default settings of most printers. If yours is different, please consult the manual and set it up before printing. For forms with more than one page, the program asks you to choose the page you want to print. For a 1040-A file, you can specify page 1 or page 2 of Form 1040, or Schedule A. Next you have the option to align the paper. If you use overlays, skip the alignment. Otherwise, follow the program's instructions for alignment.

The commands N (New form), Q (Quit), and S (directory list) work the same way as in the main program.

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