MacInTax............Michael Stephenson

Requirements....

MacInTax will run on any Mac from a 512K to a Mac II. You will also need two (2) 800K floppy drives or one (1) floppy drive and a hard drive. Printing on an ImageWriter or LaserWriter is excellent.

Installation....

MacInTax comes on two (2) floppy disks in compressed format. Whether you use floppies or a hard drive, installation is made simple with an auto installer program. You must also install some extra fonts into your system to have the forms view and print correctly. All software needed is provided, and step by step instructions make the process quick and painless.
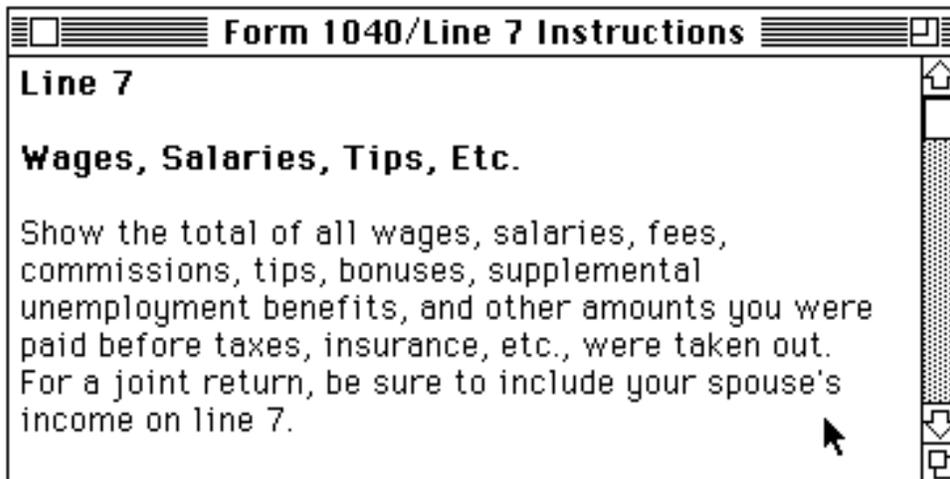
Getting Started....

After reading enough of the manual to install the program and correct fonts, the on-line help should suffice. The manual does go through the commands and forms with short paragraphs, but like most Mac programs this one is simple to use.

Upon opening MacInTax, you are presented with a guide to help you determine which set of forms you should use: 1040, 1040A or 1040EZ. After selecting the formset that fits your requirements, MacInTax loads the forms, schedules, worksheets, and statements into the menu and opens a blank 1040(A, EZ) form.
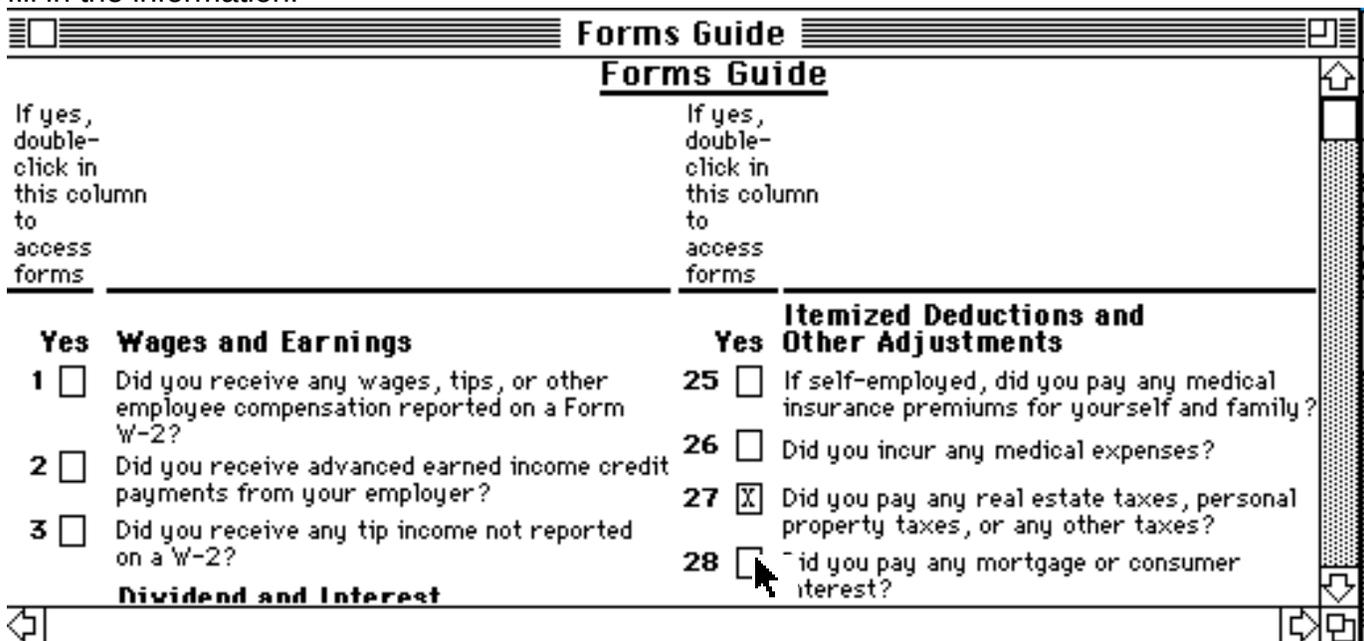
Forms And Menus....

Filling out this form is easy. Just click with the mouse or tab to the correct place and type in the information. If you're not sure that an amount belongs on a certain line, you can double-click on that line of the form and the information from the IRS instruction book is presented on the screen.

Line 7

Wages, Salaries, Tips, Etc.

Show the total of all wages, salaries, fees, commissions, tips, bonuses, supplemental unemployment benefits, and other amounts you were paid before taxes, insurance, etc., were taken out. For a joint return, be sure to include your spouse's income on line 7.

When you come to a line for which you don't have the amount but know you will have it later, you can plug in an estimate and type a "e" after it (ie 5000e). MacInTax will use the number to complete its calculations, but flag it so that you can correct it later.

After completing as much of the 1040 form as you can, there are a number of ways to select the next form. One way is to go back to the Forms Guide and check "yes" to a question that pertains to you. MacInTax will automatically open the form needed to fill in the information.

Forms Guide

If yes, double-click in this column to access forms

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Yes	Wages and Earnings
1 ☐	Did you receive any wages, tips, or other employee compensation reported on a Form W-2?
2 ☐	Did you receive advanced earned income credit payments from your employer?
3 ☐	Did you receive any tip income not reported on a W-2?

Dividend and Interest

Yes	Itemized Deductions and Other Adjustments
25 ☐	If self-employed, did you pay any medical insurance premiums for yourself and family?
26 ☐	Did you incur any medical expenses?
27 ☒	Did you pay any real estate taxes, personal property taxes, or any other taxes?
28 ☐	Did you pay any mortgage or consumer interest?

Another way, if you know which form you want, is to just select it from the menu. The menus also tell which forms are complete. Underlined items are complete and outlined items are incomplete. To complete a form you have started, MacInTax gives you a quick way to locate which lines need information. Select the form and press option-return. This will highlite the first entry that must be made. You can repeat this sequence until all needed lines are completed.

Schedules Worksheets Statements

A: Itemized Deductions
B: Interest & Dividend Income
C's: Business Income
D: Capital Gains & Losses
D-1: Continuation Sheet
E's: Supplemental Income
F's: Farm Income
R: Elderly or Disabled Credit
Short Schedule SE-1: Your Self-Employment Tax
Short Schedule SE-2: Spouse's Self-Emp. Tax
Long Schedule SE-1: Your Self-Employment Tax
Long Schedule SE-2: Spouse's Self-Emp. Tax

One more way to select a form is to double-click on the entry portion of the line (on the 1040 form) that corresponds to the form on which you would like to work. To me, this is a good way to jump from form to form entering data without having to be organized before starting. Since all forms are linked, you can hop back and forth and watch what your data does to the bottom line on the 1040.

Once you have started a MacInTax file, the best way to open unfinished forms is to select them all at once under the Open Forms menu choice. This is a summary of the forms that you have used and tells you which ones are not complete.

Select the Forms to Open

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-MY TAXES / Form 1040 (NOT DONE)
-Schedule A: Itemized Deductions (NOT DONE)
Schedule B: Interest & Dividend Income
A/14&15 Statement: Char. Contributions
Schedule A/20, 21 & 26: Misc. Deductions
-Form W-2: Employment Information Summary (NOT DONE)
-Form W-2(1): Wage and Tax Statement (NOT DONE)
Form W-2(2): Wage and Tax Statement
Form W-2(3): Wage and Tax Statement
-Tax Payments Worksheet (NOT DONE)
-Schedule A/Line 1 Itemization (NOT DONE)
Schedule A/Line 6 Itemization
Schedule A/Line 7 Itemization
Schedule A/Line 9a Itemization
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[Cancel]   [OK]

There are some helpful features in MacInTax. If you double-click on a line for which you have a number of entries, an itemization worksheet will appear. List your data and close the worksheet. The total of the data that you entered will automatically be shown on the line that you itemized.

Schedule A/Line 1 Itemization

Schedule A/Line 1 Itemization

Itemization of:

	Description	Amount
3 Items	Total	400.00
a	DOCTORS	200.00
b	PRESCRIPTIONS	50.00
c	GLASSES	150.00
d		
e		
f		
g		
h		
i		
j		
k		
l		
m		
n		
o		

MacInTax also checks for discrepancies. For instance, if you fill in your spouse's name and then try to check the filing status box for a single person, a warning appears

telling you about the inconsistency.

Another nice feature is the built-in tax table. It is really nice not to have to find out which table to use and then filter through to find what you should have paid.

There is an abundance of forms available with MacInTax. Here is a list of those that come with release one (1):

• **Forms**

| Forms Guide | 1040 | 1040A | 1040EZ | 2106 |

2441   3903   4562   8453   8582
Electronic Filing Form
Personal Information Form (Electronic Filing)
Refund Anticipation Loan Application (Electronic Filing)

• Schedules

A	B	C (9)	D	D-1
E (9)	F (9)	R	SE (You & Spouse)	1(1040A)
2(1040A)	3(1040A)			

• Worksheets

W-2 Summaries(2)	1040/17:Pensions	2106 Adjustments
2441 Adjustments	3903 Adjustments	Passive Worksheets 1-4
Dispositions Worksheets	SE Adjustments	Status Summary
Tax Payments	Schedule 2 Adjustments (1040A)	1040A/11:Pensions
1040A/15:IRA Deductions	1040/28c:Earned Income Credit	1040/24:IRA Deductions
1040/33b:Dependent's Deduction	1040/57:Earned Income Credit	
A/16&17: Contributions Limitations	W-2	

• Statements

1040/6:More Dependents	1040/22:Other Income
A/14&15:Charitable Contributions	A/20, 21, & 26:Miscellaneous Deductions
B:Interest Income (2)	B:Dividend Income (2)
D/2d&9d:Additional Capital Gains and Losses	Unlisted Property Statement
Listed Property Statement	Alternative Depreciation Statement
Dispositions Statement	Miscellaneous Statement
1040A/6:More Dependents	

Release two (2) will contain additional forms that where not finalized at this time. If what you need isn't here, you can call Softview at 1-800-622-6829 to find out if it is included in release two (2).

Once you have completed your tax return, you have to somehow share it with the I.R.S.. Electronic filing is available through filing services and one phone number is given in the manual. The cost for this service is $29.95. Printing your forms and mailing them yourself may be the way for you. MacInTax really shines here. The quality of the printouts (even on my ImageWriter II) is great. Not only does MacInTax print them on blank paper, but it does so in the proper order for submission. (And I didn't even know there was an order.) When this is done, all that's left is the wait for that big check.

Pros....

MacInTax is a complete tax filing program. It takes the drudgery out of doing your taxes and makes it fun. (Well tolerable.) This program is simple to use, has good on-line information, and makes errors a thing of the past. No more adding that misplaced information when you thought you were done and then having to recalculate the forms. With MacInTax it's automatic. I especially like the itemization worksheets. To be able to make a list of the items that make up a number on your tax forms takes all the guesswork out

of what you were thinking of at a later date. I would recommend to anyone who does his own taxes to give MacInTax a try. I think you'll be hooked.

Cons....

One thing I don't like about MacInTax (beside not getting a larger refund) is that I have to wait for release 2 before I can file. This isn't really Softview's fault (because one of the forms I need wasn't approved by the I.R.S. yet), but it is the second week in February and I would think that everything should have been finalized by now.

Another thing I would like to see is a state tax form for Arizona. I would think there are enough Mac users here to support such a program.

Where To Buy....

You can buy MacInTax directly from Softview for $99.00 by calling 1-800-622-6829. If you have a favorite mail order house look for it at about $60.00.