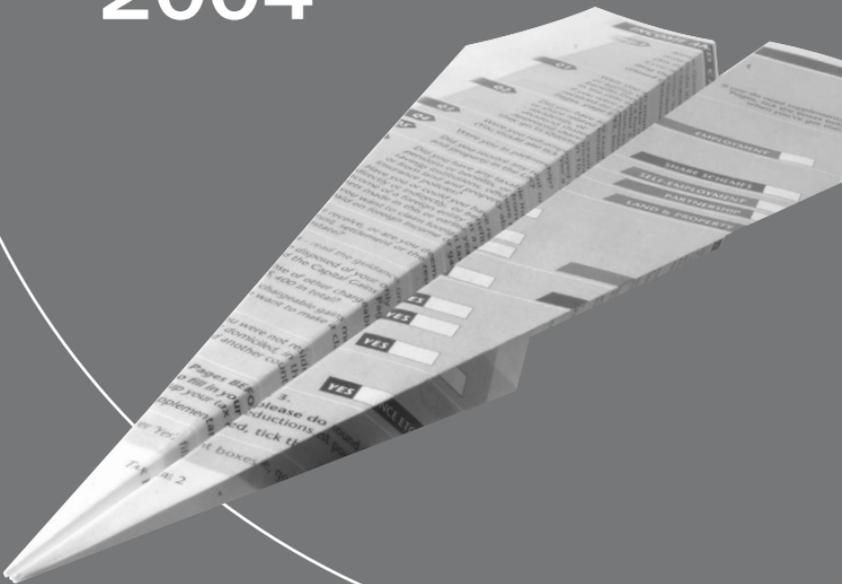




# ***TaxCalc***<sup>®</sup>

SELF ASSESSMENT TAX RETURN SOFTWARE

## User Guide 2004



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## TaxCalc® 2004 User Guide

<b>Introducing TaxCalc 2004</b>	4
<b>What's New</b>	6
<b>Installation and updates</b>	8
<b>Before you start</b>	9
<b>Using TaxCalc</b>	10
<b>New and previous users</b>	11
<b>Forms Navigator</b>	12
<b>Electronic filing</b>	13
<b>Paper filing</b>	14
<b>Print setup</b>	15
<b>Checking your return</b>	16
<b>Finding help</b>	17
<b>Contact us</b>	18



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# Introducing TaxCalc 2004

TaxCalc has been widely praised ([www.taxcalc.com/accolades](http://www.taxcalc.com/accolades)) for its ease-of-use and value, and is popular for securing quick rebates and ensuring you pay only the correct tax. We continually improve the program in response to your feedback while retaining the familiar, easy-to-use interface.

## Make the most of TaxCalc

- You can now prepare up to six individual tax returns for family members, making TaxCalc even greater value!
- File returns electronically (recommended), or print and submit approved paper forms.
- Even if you do not need to file a tax return, you can check whether or not you have paid too much tax.

## Live Update

This is the simple way to update your program over the Internet. We are refining Live Update to minimise the download time.



## TaxCalc 2004 and 2003

The 2004 edition of TaxCalc includes TaxCalc 2003 so that you can still access your 2003 return, or, if you are one of the 10% who missed the January 31, 2004 filing deadline, you can still use it to prepare your 2003 return.

## Feedback

We are very grateful to everyone who completed our in-product survey or who otherwise gave us feedback on TaxCalc and how we can make it even better.

While we cannot respond to each comment individually, we read and value all feedback and continue to use it to improve the program.

When you file your return, you will have the opportunity to complete a survey. Alternatively, you can email us at [support@taxcalc.com](mailto:support@taxcalc.com) or write to:

TaxCalc Feedback, Intuit Ltd  
PO Box 2234, Maidenhead, SL6 8WQ

**Important** If you use TaxCalc to prepare returns or to provide tax information or advice for payment, you **must** use TaxCalc Pro. Upgrade online by selecting **Help > Upgrade**.

## System requirements

To use TaxCalc, your computer must meet the following minimum requirements:

- IBM PC compatible
- Pentium processor (Pentium II recommended, 300 MHz for Windows® XP)
- Windows® 98/ME/2000/NT4/XP
- 16 MB of RAM (32 MB recommended, 128 MB for Windows® XP)
- 40 MB of hard disk space
- Bubblejet or laser printer
- SVGA monitor
- 800 x 600 minimum resolution
- 256 (or better) colour display
- CD-ROM drive
- Internet connection to file online or obtain software updates (LiveUpdate)

## Registration

If you purchased TaxCalc directly from Intuit, you are automatically a registered user.

If you purchased TaxCalc from a retail store, you can register for free support by returning the enclosed pre-paid registration card or online at [www.taxcalc.com](http://www.taxcalc.com). To receive TaxCalc automatically each year, select the Auto-Renewal option on the card or the web form.

## 30 minutes or your money back

If your return takes you more than 30 minutes to do, we will refund your purchase price (excluding postage and packing). For full details, see [www.taxcalc.com/30\\_min\\_challenge.html](http://www.taxcalc.com/30_min_challenge.html).

## License

The full license agreement appears during installation of TaxCalc and at [www.taxcalc.com/eula.html](http://www.taxcalc.com/eula.html).

Completing the installation of TaxCalc indicates your acceptance of all the terms in the license agreement.

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# What's New

## Filing online

The ease, speed and accuracy of online filing are proving very popular with our users.

This year, we are providing more help with Inland Revenue registration and the storage of your User ID and password (see page 13 for details).

The Inland Revenue has eased some of its restrictions (see Help for details), including allowing more capital gains disposals. TaxCalc now also logs and saves all filing submissions to your hard drive.

## More returns = more value

Prepare up to six individual returns to cover all your family's needs.

Plus, you don't need to have received a tax return in order to check whether or not you paid the correct tax. Just enter the details into TaxCalc and check the result.

## TaxCalc 2004 includes 2003

For your convenience, we have included TaxCalc 2003 as part of TaxCalc 2004.

## Quicken XG 2004

Import details of investment income directly from Quicken XG 2004, when released.

**EXTENDED SUPPORT HOURS** During January 2005, we will offer support between 9 a.m. and 8 p.m., Monday to Friday, and 10 a.m. to 4 p.m. on Saturdays (see page 18 and check [www.taxcalc.com](http://www.taxcalc.com) for changes to support hours).

## Even easier Help

Our support has always been of a high quality and now it is even easier to get.

Select **Help > Contact Support** to email a system "snapshot" and/or your tax file to our support team. Visit our website or telephone our support team (see page 17 for details).

Find help with online filing directly from the filing window.

## Display previous-year entries

When you bring forward a file from 2003, move your cursor over the field to display the previous-year entry.

**PARTNERSHIPS** If you need to prepare a partnership tax return (form SA800), upgrade online. Connect to the Internet, go to **Help > Upgrade** to purchase the partnership return for £19.99.

## Help with online filing registration

EasyStep helps you to obtain and store your Inland Revenue User ID and password. If the Inland Revenue ever changes the registration process, LiveUpdate will make sure TaxCalc can handle the change.

## Rounding

Choose to round figures in your tax return.



Change your mind later and the actual figures are restored. See the difference rounding (or any other **what-if scenario**) makes in the Monitor at the bottom of the window.

## More calculation detail

EasyStep includes extra summaries for employment and self-employment income, partnership trade entries and the calculation of capital gains.

## Partners

Import details of partnership income directly from the partnership return statement to each partner's individual tax return. Select **Import data from SA800** in the Tasks panel.



## Jump to a specific box

Enter a box number or a form number in the **Go** field and press **<Enter>** to jump to that box. In the Forms mode, the **Go** field is at the top of the Forms list, on the left side of the screen. Press **<F4>** to move the cursor into the **Go** field.



## Printing

TaxCalc automatically provides a print preview of your return and finds the optimum printer settings for your computer and printer.

**CHANGE OF ADDRESS** Don't miss out on TaxCalc 2005 just because you move! Use the enclosed, pre-paid change of address card to give us your new address.

## Installation

To install TaxCalc from the CD:

- 1 Close all other programs running, including anti-virus software.
- 2 Insert the TaxCalc CD into your CD-ROM drive.
- 3 The installation program should run automatically. If not, use Windows Explorer to browse to your CD-ROM drive and double-click the file called **tcsetup.exe**.
- 4 Follow the on-screen instructions to install TaxCalc.

Following installation, please take a minute to read the ReadMe file as it may contain important late-breaking information.

If you close the ReadMe file without reading it, you can open it again by clicking on the Windows® Start button and selecting **All Programs > Intuit > TaxCalc 2004 > TaxCalc 2004 Readme**.

## Uninstall TaxCalc 2003

Since TaxCalc 2004 includes the 2003 tax return, you can uninstall TaxCalc 2003 if you wish. This will not affect your saved tax files.

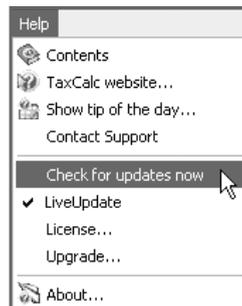
Click on the Windows® Start button and select **All Programs > TaxCalc 2003 > Uninstall TaxCalc 2003**.

## LiveUpdate

We occasionally provide updates to TaxCalc, so as to add new features, incorporate legislative changes and to comply with changes in the Inland Revenue online filing system.

LiveUpdate regularly checks to see if there is an update available from our website.

To turn off automatic LiveUpdate, remove the checkmark next to **Help > LiveUpdate**.



You can check at any time (providing you are connected to the Internet) by selecting **Help > Check for updates now**.

## The paperwork you'll need

Use the following list to help you gather the paperwork you need to complete your return. EasyStep includes a full checklist. The list below contains the most common items.

### EMPLOYMENT

- P60 form showing your pay and tax paid if you were employed on April 5, 2004
- P45 form showing your pay and tax paid if you left your place of employment before April 5, 2004
- P11D form showing the employment benefits (such as a company car) you received

### INLAND REVENUE FORMS

- P2 forms (tax code notices) for the 2003-2004 and 2004-2005 tax years
- Any statements of account

### BUSINESS INFORMATION

- If you are self-employed, the accounts, or records of income and expenditure, for your business
- If you are a partner in a business, a copy of your partnership statement (from the partnership tax return) showing your profit or loss

### BENEFITS AND PENSIONS

- P45U or P60U for any incapacity benefit or job seeker's allowance
- Amount of state pension received
- P60 forms for any occupational pension
- Statement of the amount received and tax paid for any other pension

## INVESTMENTS AND SAVINGS

- Details of share options exercised during the year
- Tax vouchers for dividend income
- Bank statements or summaries showing interest earned and tax paid
- Record of payments into a personal pension (such as a pension or FS AVC certificate)
- Details of the cost, proceeds and expenses for any asset sold

## Register with the Inland Revenue

We recommend filing online. Registration can take three to five days but EasyStep will help you to do this.

## Rounding and filing method

To receive the best advice as you enter information, select the filing method before you start entering information (see page 13). Also decide whether or not you want to round your entries (see page 7).

## Which return should I use?

### SA100 INDIVIDUAL TAX RETURN

If you received a self-assessment tax return (SA100), you **must** submit one. You may claim any repayment within the SA100; but do **not** use the R40 return to claim it.

### R40 REPAYMENT RETURN

Use this if you are not required to complete a self-assessment return and you regularly receive repayments, such as those for a non-working spouse or a minor child with investment income.

### SA800 PARTNERSHIP RETURN

While TaxCalc Standard 2004 includes the partnership page (SA104) required for the individual return, you will also need to file a partnership return (SA800). Select Help > Upgrade to purchase a partnership return.

## Personal representatives and Executors

To complete a return for someone who has died, enter the capacity in which you are completing the return (executor or personal representative) and the date of death.

If the death occurred before April 6, 2004, TaxCalc produces a return as normal.

If the death occurred after April 5, 2004 and before April 6, 2005, TaxCalc adds the period to which the return applies to

at the top of each page. This allows you to finalise any tax liability and the administration of the estate without having to wait until April 6, 2005.

We recommend you leave the Inland Revenue to calculate the tax, as the rates, allowances, etc. may differ from the 2003-2004 tax year. The calculation within TaxCalc will therefore only indicate the approximate tax due or amount refundable.

## EasyStep, Forms and Dual

TaxCalc offers three different ways to complete your return:

- Use **EasyStep** if you have no tax or computer expertise. It will guide you through completing your return.



- Use the **Forms** mode if you are confident enough with the Inland Revenue return forms, to know where to enter information into your return.
- Use the **Dual** display to view EasyStep in the top half of the window and the forms in the bottom half.

Click the buttons on the toolbar to switch between **EasyStep**, **Forms** and **Dual** modes.

## New users

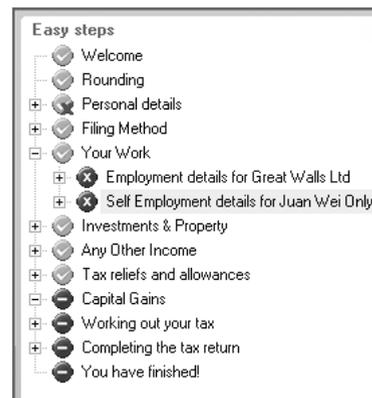
If you are using TaxCalc for the first time, we recommend you use EasyStep to guide you through completing your return with “as-you-type” advice.

Answer each question or enter the required amount on each screen. EasyStep only asks you for information relevant to your tax situation.

On the Start screen, select **Create a new 2004 return** (see page 10 to find out which return you should use).



Use the **Previous** and **Next** buttons to move from one step to the next. The panel on the right side of your screen tracks your progress through the return. Click on the name of a step to jump to that step.



## HELP PANEL

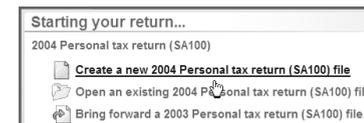
In EasyStep, the Help panel at the bottom of the window offers advice relating to the step you are on. Click **More Help** to read detailed information.



## Previous users

### BRING FORWARD YOUR 2003 FILE

Save time this year by bringing forward information from your 2003 return into 2004.



TaxCalc transfers information such as your name, address and employment details to the new return. The only amounts brought forward are items you need for 2004, such as losses.

View last year's entry by moving your cursor over any tan coloured field. TaxCalc will also show the amount by which this year's entry varies from last year.

# Forms Navigator

The **Forms Navigator** provides access to all TaxCalc forms. It is only visible when you are in Forms mode. Use it to:

- view tax summaries and calculations
- open the return forms and working sheets
- see which forms already contain information
- display a lists of tasks associated with a particular form

## Open a form

Click the plus symbol (+) beside a form category (for example, Employment) to display all the forms in that category. Click the name of a form to open it.



Click the **Navigator** button on the toolbar to open and close the Forms Navigator and increase the area of the forms you can see.

## Status indicator

When the status indicator to the left of the form icon is:

- **RED**, the form contains errors or provisional entries
- **GREEN**, the form is error-free

## Task list

The Task list on the left side of the window (in Forms mode) allows you to carry out tasks related to the information you are entering.



## Tabs

In Forms or Dual mode, each form opens on a tab at the top of the window. Click on the tabs to move between open forms.



# Electronic filing

## Filing online

More and more people are using TaxCalc to benefit from filing online.

## Why should I file online?

- Get immediate confirmation that the Inland Revenue received your tax return and agrees with the calculation of tax.
- Receive your repayments within three to five days (typically).
- Avoid the risk of an Inland Revenue transcription error, unlike with paper returns.
- TaxCalc calculates your tax, which is then agreed by the Inland Revenue, so you will not be one of the 5% of taxpayers (more than 450,000) whose tax bill the Inland Revenue miscalculates.
- Connect for only a matter of seconds to the Inland Revenue system, using the highest level of encryption available (the same as online banking).
- Save costs and protect the environment by using less paper.
- View your statement of account on the Inland Revenue website.
- Choose to have your tax collected through your tax code between April 2005 and March 2006, if you file online by December 30, 2004, and owe less than £2,000, and have a PAYE tax code. Otherwise, you must pay the tax in a lump sum by January 31, 2005.

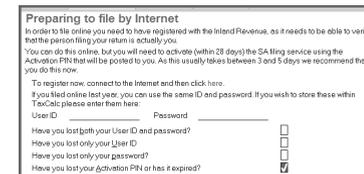
**NOTE** TaxCalc transmits only information entered into tax return fields. No memos, notes or other information are sent to the Inland Revenue.

## Registration

Use TaxCalc to register to file online with the Inland Revenue.

After you register, you will receive an Activation PIN through the post. Make sure you use this PIN to activate your enrolment to the filing service **within 28 days**. Otherwise, you will need to obtain another PIN.

TaxCalc stores your User ID and password and helps you obtain replacements if you misplace them. You can change your password on the Inland Revenue website.



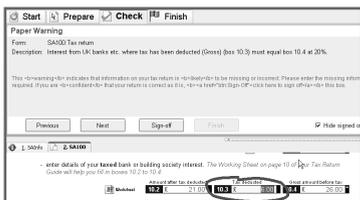


# Checking your return

TaxCalc helps you review your return before you file it, according to the filing method you chose (online or paper).

Choose between two ways to review your return:

- The **Check** tab in Easy Step lets you view each audit message and circles the related entry in red. Type in the field to correct the entry or click the **Sign-off** button if you feel it is correct.



- In **Forms** mode, click **<F9>** or the **Auditor** button on the toolbar to open the Auditor at the bottom of the window.



- Double-click on a message to jump to the related entry. Type in the field to correct the entry or right-click on the message and select the **Sign-off** button if you feel it is correct.



## Signing off a message

While some messages are not critical when filing by paper, they may prevent you from filing online. For example, the length of an employer's name may print correctly on a form but may be too long for the Inland Revenue online filing system.

Once you sign off an audit message, you will not see it again. Always try to correct an entry rather than sign-off.

**WARNING** Only sign off on an audit message when you are certain that it will neither affect your return or your ability to file it.

## Sign your return!

If you are filing by paper, do not forget to sign your return on page 10. This is one of the most common reasons for the Inland Revenue rejecting a return.

Page 10 also contains a list of the forms you must submit with your return. Check that you have all those forms and that they printed correctly.

# Finding help

TaxCalc includes resources to answer your questions about the program or about your tax return requirements.

## Help as you work

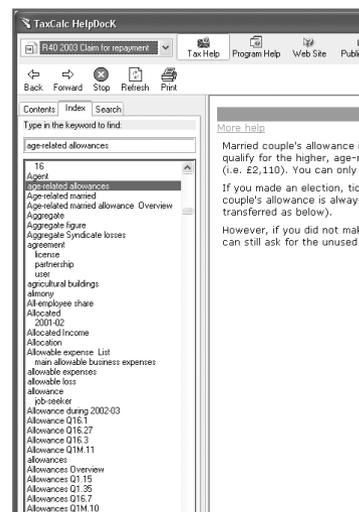
In EasyStep, the Help panel provides assistance as you work. Click **More Help** for additional information.

In the Forms mode, press **<F1>** from any form to display help related to the form you are currently viewing.

## Online TaxCalc Help

To access online help, select **Help > Contents**.

Click the **Tax Help** button for tax-related assistance. Click the **Program Help** button for assistance with using the software.

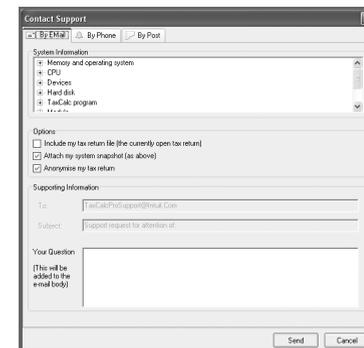


## Frequently Asked Questions

We provide answers to frequently asked questions (FAQs) at [www.taxcalc.com](http://www.taxcalc.com). From the Help menu in TaxCalc, select TaxCalc website. Check the Support menu on the website for the latest software news.

## Contact Support

Select **Help > Contact Support** to get quick and free support.



Send us an email with a **snapshot** of your system or attach a tax file to your email. No personal information is sent in a snapshot – you can verify the contents of this snapshot by opening the email attachment. All tax files are treated with absolute confidentiality and deleted as soon as any issue is resolved.

Before sending, you can remove personal details from your file by ticking the "Anonymise my tax return" box.

## Contact us

In addition to resources listed on page 17, check the our website [www.taxcalc.com](http://www.taxcalc.com) for the latest news.

Sleep better when you use TaxCalc to do your tax return.



### TaxCalc Standard

Use **Help > Contact Support** to email your question, system snapshot and tax file question.

You can also contact us by telephone between 9 a.m. and 5:30 p.m., Monday to Friday (excluding bank holidays).

### TaxCalc Pro

Includes priority support. Select **Help > Contact support** for the priority email address and telephone number.

### TaxCalc Lite 2004

Support is provided by email only at [support@taxcalc.com](mailto:support@taxcalc.com).

### Extended support in January 2005

Between January 3 and 31, 2005, we will be open from 9 a.m. to 8 p.m., Monday to Friday and from 10 a.m. to 4 p.m. on Saturdays.

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