

## TAX AND ACCOUNTING CENTER

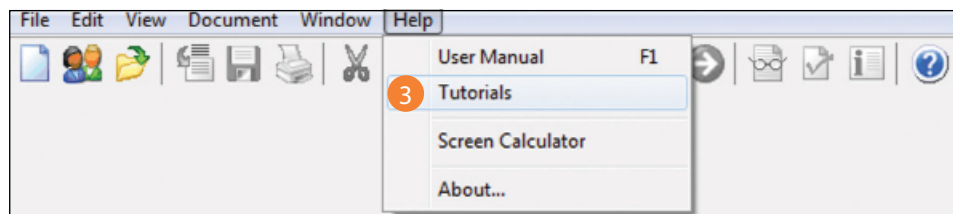
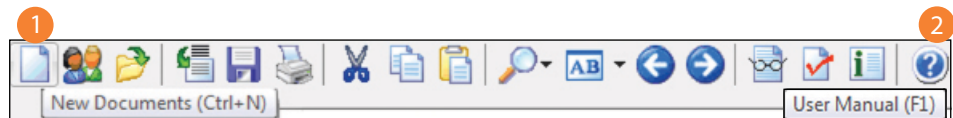
### How to Use Interactive Forms on the Web or CD

All Bloomberg BNA Interactive Tax Forms are government approved. Automated form processing requirements for barcodes, scanlines, validation fields, etc. are built in to guarantee filing requirements are met. New and updated forms are added to the collection as they are released by the issuing agencies. To access Tax Forms on the web, click 'Tax Forms' in the Tax Forms frame on the Bloomberg BNA Tax and Accounting Center Home Page. To access Tax Forms on CD, load the Tax Forms disk and click the 'Interactive Forms' icon placed on the desktop.

TAX FORMS	
•	Tax Forms
•	Forms Line-by-Line Guide
•	Federal Tax Calendar

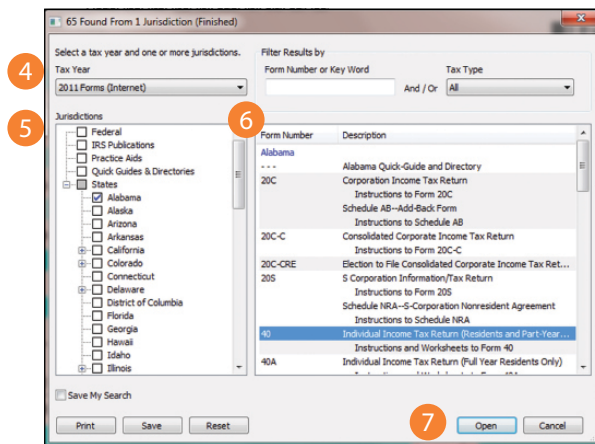
### TOOLBAR

- 1 Click the toolbar buttons for the primary functions in the forms. Hover over a button to display the button's function.
- 2 Click the question mark button to access the User Manual with in-depth information about using Interactive Forms.
- 3 Click 'Help' then select 'Tutorials' for additional assistance with Interactive Forms.



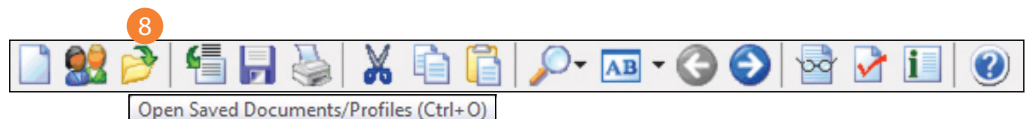
### NEW DOCUMENT

- 4 Select a Tax Year. 2001-2011 forms are available.
- 5 Select a Jurisdiction (Federal or States), IRS Publications, Practice Aids, or Quick Guides & Directories.
- 6 Select a Form Number or document title as pertinent.
- 7 Click 'Open.'



### SAVED DOCUMENTS

- 8 To access previously saved Documents and Profiles, click the 'Open Saved Documents/Profiles' button.

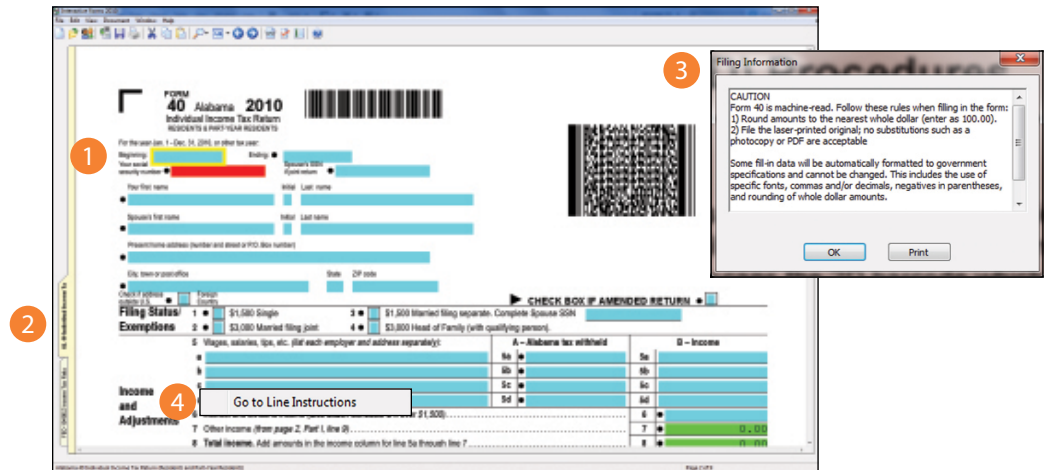


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## How to Use Interactive Forms on the Web or CD

### FORMS WORKSPACE

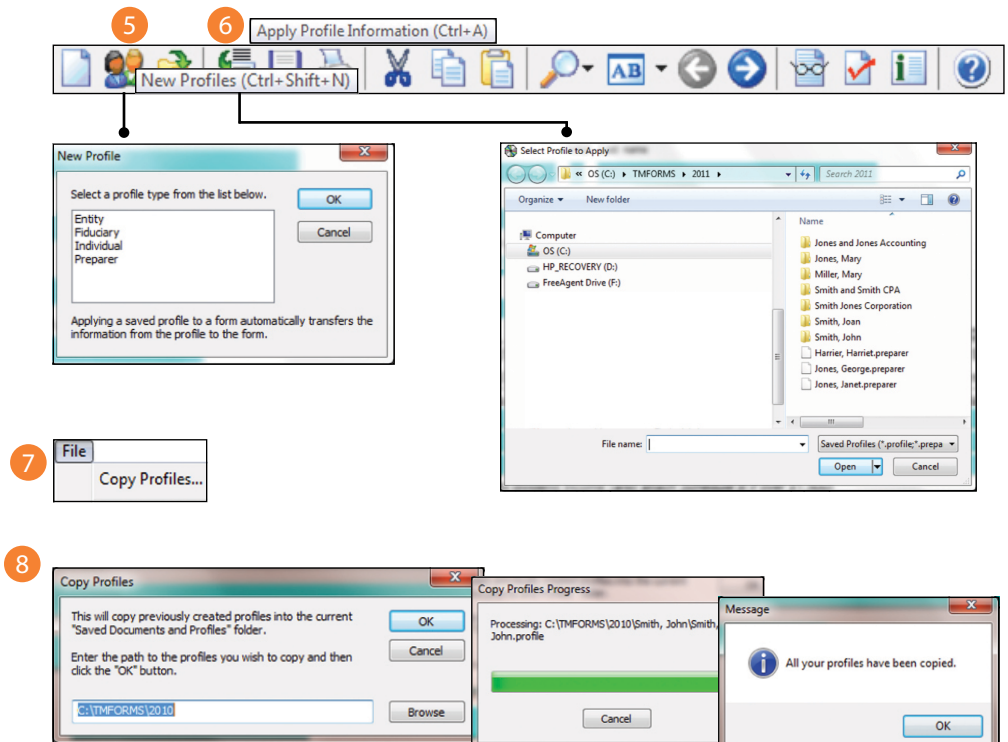
- 1 Fields are color-coded:  
Red – Required field  
Aqua – Fill-in field  
Green – Auto-calculate field  
A yellow outline indicates the active field. Right-click a menu of the available additional functions.
- 2 Use the Tabs to navigate among open forms and documents. To navigate through fields, [Tab], [Enter], or use the keyboard's up and down arrows.
- 3 Filing information automatically displays when a form is opened.
- 4 Right-click in any line to display the Line Instructions. To display the Tax Tables and Rate Schedules, right-click anywhere in the Line Instructions.



### PROFILES

Profiles are reusable files containing contact and other pertinent information.

- 5 Click 'New Profiles' to create a new profile. Select the type of profile to be created and click 'OK.'
- 6 To apply profile information to a form, click 'Apply Profile Information,' select the profile, and click 'Open.'
- 7 To copy a previous year's profiles to the current year's client folders, click 'File' then select 'Copy Profiles.' The dialog box opens with the path to the previous year's forms. Click 'OK.'
- 8 Profiles are automatically copied to the current year's folder. If identical client names exist, information for each client is numbered (e.g., smith2, smith3) and placed in a data folder. A confirmation message displays when the process is complete.



To learn more about the Tax and Accounting Center, contact your Bloomberg BNA Representative at 800.372.1033 or visit [bna.com](http://bna.com)