All Bloomberg BNA interactive tax forms are government approved to ensure filing requirements are met. Automated form processing requirements for barcodes, scanlines, validation fields, etc. are built in to each form. 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 (Interactive) 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.

**TOOLBAR**

1. Click the toolbar buttons for the primary functions in the forms. Hover over a button to display a button’s function.

2. Click the question mark button to access the User Manual for in-depth information about using Interactive Forms.

3. Click Help, then select Tutorials for additional assistance with Interactive Forms.

**NEW DOCUMENT**

4. Forms are available for 2004 through the Current Year. Use the drop-down menu and select the year. The default is Current Year Forms (Internet).

5. Select a Jurisdiction: Federal or State(s), IRS Publications, Practice Aids, or Quick Guides & Directories. The list of available forms or documents display in the right frame.

6. Select a Form Number or document title in the right frame.

7. To open a form or document, double-click the title or select the title and click Open.

**SAVED DOCUMENTS**

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

2. Use the tabs to navigate among open forms and documents.

3. To navigate through fields, press [Tab], [Enter], or use the keyboard’s up and down keys.

4. Right-click in any line to display the Line Instructions and the menu of available additional functions. To display the Tax Tables and Rate Schedules, right-click anywhere in the Line Instructions.

5. Printable filing information automatically displays when a form is opened.

To close a form, click the x in the far right corner of the form, or right-click anywhere on the form and select Close.

PROFILES

Profiles are reusable files containing client or preparer contact and other pertinent information. There are four types of profiles: Entity, Fiduciary, Individual, and Preparer.

1. Click New Profiles to create a new profile.

2. Select the type of profile to be created and click OK.

3. To apply profile information to a form, click Apply Profile Information, select the profile, and click Open. Before a form is saved, you are prompted to add a profile if desired.

4. To copy profiles from the previous year to the current year’s client folders, click File and select Copy Profiles. The dialog box opens with the path to the previous year’s forms and profiles. Click OK.

5. Profiles are automatically copied to the TMFORMS/Documents folder. If identical client names exist, information for each client is numbered (e.g., smith1, 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, call 800.372.1033, or visit bna.com