



Drake Tax 25 — Macros Quick Reference Guide

Updated January 2026

Before You Start

- Change PREP to your preparer code
- Change PREP1 and PREP2 to your code and a coworker's code
- Change 11111 to your actual ERO PIN
- Test each macro on a sample return before production use

All Macros

Alt-A: AOTC Education Credit

```
8863>#7>X>9>X>11>X>13>X>22>X>34>X>36>X>#~
```

Opens 8863, checks Yes for questions 23-26, checks AOTC, checks 1098-T questions

Alt-B: Direct Deposit - Checking

```
DD>[FJ:1]A[FJ:9]X[FJ:6][?]
```

Opens DD, selects Federal (A), checks Checking, pauses at bank name

Alt-D: 8867 Due Diligence - All Yes

```
8867>#1>X>3>X>5>X>7>X>9>X>11>X>13>TP SIGNED DUE  
DILIGENCE>14>X>16>X>19>X>22>X>25>X>27>X>29>X>32>X>34>X>36>X>38>X>40>X>42>X>44>X>#~
```

Marks Yes on all due diligence questions, enters standard note

Alt-E: Zero Balance Extension

```
EF>#1>X>6>X>#~EXT>#1>X>3>0>6>0>7>0>8>0>9>0>#~STEX>#2>X>#~
```

Multi-screen: marks Ready + 4868, enters zeros, marks state extension

Alt-F: Foreign No + Preparer

```
1>[FJ:64]N[FJ:66]X[FJ:68]PREP~
```

Opens Screen 1, enters N for foreign accounts, checks No, enters preparer code

Alt-H: HOH Due Diligence

```
8867>#29>X>32>X>34>X>#~
```

Marks HOH-specific questions on 8867. Use after Alt-D for HOH returns

Alt-I: Clear Invoice Flag

```
MISC>#3> >#~
```

Clears prior year invoice from MISC screen

Alt-M: 8949 Multiple Trans Statement

```
PDF>SCH D,FORM 8949 INST>FORM 8949 EXCEPTION TO REPORTING>FORM8949EXCEPTIONREPORTINGSTMT.PDF~
```

Attaches 8949 exception statement PDF for multiple transactions

Alt-O: Ohio Address Verify

```
OH>1>[FJ:47]X[FJ:5]~COMP> >[FJ:23] ~
```

Ohio address verification checkbox + clears comparison flag

Alt-P: Enter PIN + Ohio

```
PIN>[D]>11111>[NEXTTAB][FJ:7]X~
```

Opens PIN dropdown, enters ERO PIN, checks Ohio perjury box

Alt-R: Ready After Extension

EF>#1> >6> >#~EXT>#5>X>#~STX2>#1>X>#~

Clears Ready/4868, marks extension previously filed, marks state ready

Alt-S: 8821 Spouse

8821>S>#5>X>27>INCOME>28>1040>29>2020-2029>40>X>52>PREP1>53>X>57>PREP2>#~

Creates Form 8821 for spouse with standard settings

Alt-T: 8821 Taxpayer

8821>T>#5>X>27>INCOME>28>1040>29>2020-2029>40>X>52>PREP1>53>X>57>PREP2>#~

Creates Form 8821 for taxpayer with standard settings

Alt-U: IDs Not Provided

IDS>[FJ:24]X[FJ:26]X~

Marks both taxpayer and spouse 'did not provide ID'

Alt-V: E-file Federal 1040

EF>#1>X>2>X>#~

Marks Ready for EF and selects 1040

Alt-Z: Don't Roll to Next Year

MISC>#20>X>#~

Checks 'Do NOT update client to next year'

Tips

Find field numbers: Press Ctrl+N in data entry (heads-down mode)

View your macros: Press Ctrl+Shift+M in data entry

Edit macros: Go to Setup > Macros

How to Install

1. Open Drake Tax and go to Setup > Macros
2. Select the hotkey (Alt-A through Alt-Z)
3. Paste or type the macro string
4. Click Save
5. Test on a sample return before production use