




2017 PLANNER CS, v.2017.1.0
User Bulletin 8509: Initial Release

November 20, 2017

This user bulletin describes enhancements and changes made to this release of Planner CS,[®] and special information related to scheduled 2017 Planner CS update releases.

ENHANCEMENTS

View an alert for hidden years or alternatives

With this release of Planner CS, the new Show alerts  button in the toolbar opens the Alerts dialog, which provides information as to whether the current plan includes hidden years or alternatives. For more information, see [View an alert for hidden years or alternatives](#) in the Help & How-To Center.

Credit for taxes paid to a nonresident state

With this release of Planner CS, you can calculate the credit for taxes paid to a nonresident state for any of the seventeen state modules listed below. For a resident state plan, the credit calculates for up to two attached nonresident states.

The following states include the credit calculation with this release of Planner CS.

- Arizona
- Arkansas
- District of Columbia
- Georgia
- Indiana
- Louisiana
- Massachusetts
- Mississippi
- Missouri
- Montana
- Nebraska
- North Carolina
- North Dakota
- Ohio
- Oregon
- Pennsylvania
- West Virginia

Note: Prior to this release, the following states included the credit calculation for taxes paid to a nonresident state.

- California
- Connecticut
- Delaware
- Iowa
- Kentucky
- Minnesota
- New Jersey
- New York
- Rhode Island

Closing Planner CS from the Sign In dialog

With this release, you can close Planner CS from the Sign In dialog as long as you don't have a plan or other dialog open. Prior to this release, you could not close Planner CS from the Sign In dialog.

CHANGES

Disaster Tax Relief and Airport and Airway Extension Act of 2017

This release of Planner CS includes the following calculations related to the Disaster Tax Relief and Airport and Airway Extension Act of 2017:

- You can enter qualified personal casualty losses arising from the Hurricane Harvey, Hurricane Irma, and Hurricane Maria federally declared disaster areas in the *Other fed declared disasters* field on the federal Deductions > Casualty Losses tab.
- You can enter charitable contributions for relief efforts in the above-mentioned hurricane-related disaster areas that qualify for the 100 percent of adjusted gross income deduction limit in the *2017 disaster relief contribs* field on the federal Deductions > Contributions tab.

Retirement plan limits increased for tax year 2018

The self-employed retirement plan calculations are updated for 2018 cost-of-living adjustments. Refer to the federal Adjustments > taxpayer and spouse Keogh/SEP tabs for these changes.

2018 Social Security wage base

Planner CS is updated to include the 2018 Social Security wage base amount of \$128,700. Refer to the *Social Security wages* field on the federal Income > Wages tab for this change.

State updates

The following state modules are updated with the most recent information available at the time of this release: Arizona, Arkansas, California, Connecticut, Delaware, District of Columbia, Georgia, Indiana, Iowa, Kentucky, Louisiana, Maine, Maryland, Michigan, Minnesota, Mississippi, Montana, Nebraska, Oklahoma, Oregon, Rhode Island, South Carolina, and Tennessee.

SPECIAL INFORMATION

Planner CS update releases

You can update 2017 Planner CS via CS Connect™ through October 2018. If you have an active internet connection, the Notices section of the Planner CS Home Page alerts you whenever an update is available. To download and apply updates, choose File > CS Connect, click the Connect button, and choose Connect Now.

2017 UltraTax CS integration

You can import data from 2017 UltraTax CS® with a Planner CS update release in February 2018. You must have version 2017.3.0 of UltraTax CS to enable importing to Planner CS.

Note: This release of Planner CS can import data from UltraTax CS years 2016 and earlier.

2017 GoSystem Tax RS integration

You can import data from 2017 GoSystem® Tax RS with a Planner CS update release in March or April 2018.