
ULTRATAX CS™

OH

OHIO STATE PRODUCTS

The UltraTax CS programs for Ohio work together with the federal UltraTax CS programs, reducing state tax return preparation to a few keystrokes—and a few short minutes.

By taking full advantage of the integration capabilities of CS Professional Suite, your firm can reach maximum efficiency, productivity, and accuracy.

UltraTax CS state programs automatically capture all appropriate federal data and calculate the state tax results. You enter data only once to complete both returns, simply and efficiently.

UltraTax CS is a comprehensive tax system that makes it easy to handle the particular intricacies of tax processing in Ohio.

The Ohio line-up for UltraTax CS includes Ohio Individual, Cities, Corporate (includes S Corp), Partnership, Commercial Activity Tax, Fiduciary, and Estate programs.

ULTRATAX/1040

Multi-State Processing

UltraTax /1040 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data. The system also automatically transfers non-resident income and taxes paid to the resident state for the calculation of credits as applicable.

OHIO INDIVIDUAL

Ohio Forms and Schedules

Form IT 1040ES—Individual Estimated Income Tax

Form IT 1040—Individual Income Tax Return

Form IT 1040X—Amended Individual Income Tax Return

Form IT/SD 2210—Interest Penalty on Underpayment of Ohio or School District Income Tax - Short Method

Form IT/SD 2210—Interest Penalty on Underpayment of Ohio or School District Income Tax - Long Method

Form IT 40P—Extension Payment Voucher

Form IT 10*—Information Notice

Form IT 2023*—Income Allocation and Appointment

Form SD 100—School District Income Tax Return

Form SD 100X—Amended School District Income Tax Return

Form SD 100ES—School District Estimated Income Tax

Form SD 40P—School District Extension Payment Voucher

Form TBOR-1—Declaration of Tax Representative

Schedule E*—Nonrefundable Business Credits

STATE PRODUCT PROFILE

- Ohio Individual
- Ohio Cities
- Ohio Corporate (includes S Corp)
- Ohio Commercial Activity Tax
- Ohio Partnership
- Ohio Fiduciary
- Ohio Estate

OHIO CITIES

We offer our UltraTax Ohio-cities software for your Individual, Partnership, and Corporate clients' city returns. This software produces returns that are accepted by all Ohio-cities.

OHIO CORPORATE

With the UltraTax /1120 Ohio program, you can process both C and S Corporation returns for both calendar and fiscal year-end clients.

Ohio Forms and Schedules

Form FT 1120—Corporation Franchise Tax Report

Form FT 1120C**—Corporation Franchise Tax (Combined Report)

Form FT 1120S—Notice of S Corporation Status

Form FT 1120E-ER-EX—Estimated Corporation Franchise Tax Payment Voucher

Form IT 1140—Pass-through Entity and Trust Withholding Tax Return

Form IT 1140ES —Estimated Withholding Tax Payment Coupon for Pass-through Entities and Trusts

Form IT 1140EXT—Withholding Tax Payment Coupon for Pass-through Entities and Trusts

Form IT 4708—Composite Income Tax Return for Certain Investors in a Pass-through Entity

Form IT 4708ES—Estimated Income Tax Payment Coupon for Investors in Pass-Through Entities

Form IT 4708EXT—Income Tax Extension Payment Coupon for Investors in Pass-through Entities

Form IT/SD 2210—Interest Penalty on Underpayment of Ohio or School District Income Tax - Long Method

Pass-through Entity Income Tax

Form TBOR-1—Declaration of Tax Representative

Schedule E*—Nonrefundable Business Credits

Form FT 120EL—Supplemental Franchise Tax Schedules for Electric Companies

continued >

*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – OHIO, CONT.

Form FT COM**—Request for Permission to File or to Amend a Combined Corporation Franchise Tax Report
Form FT OTAS**—Taxpayer's Affiliation Schedule
Form FT QHC*—Qualifying Holding Company Election
Form FT REF—Application for Corporation Franchise Tax Refund
Depreciation Adjustment Worksheet

OHIO PARTNERSHIP

The UltraTax/1065 Ohio program calculates the apportionment factor for multi-state clients. The Ohio program includes both the withholding and the composite income tax returns and calculates and keeps track of the Ohio's Section 179 adjustments and depreciation differences on asset additions and dispositions.

Ohio Forms and Schedules

Form IT-1140—Pass-Through Entity and Trust Withholding Tax Return
Form IT-1140ES—Ohio Estimated Withholding Tax Payment Coupon for Pass-Through Entities And Trusts
Form IT-1140EXT— Ohio Withholding Tax Extension Payment Coupon for Pass-Through Entities and Trusts
Form IT 2210-1140—Interest Penalty on Underpayment of Ohio Pass-Through Entity Withholding Tax
Form IT 2210-4708—Interest Penalty on Underpayment of Ohio Pass-Through Entity Income Tax
Form IT 4708—Composite Income Tax Return for Certain Investors in a Pass-Through Entity
Form IT 4708ES— Ohio Estimated Income Tax Payment Coupon for Investors in Pass-Through Entities
Form IT-4708EXT— Ohio Income Tax Extension Payment Coupon for Investors in Pass-through Entities
Form TBOR-1—Declaration of Tax Representative
Schedule K-1 Worksheet—Partner's Share of Income, Credits, Etc. Worksheet
Withholding Tax Depreciation Adjustment Worksheet
Composite Tax Depreciation Adjustment Worksheet
Withholding Estimated Tax Worksheet
Composite Estimated Tax Worksheet
Withholding Late Filing Interest and Penalty Worksheets
Composite Tax Late Filing Interest and Penalty Worksheets
Annualized Withholding Income Worksheet
Annualized Composite Income Worksheet
Underpayment of Estimated Withholding Tax Worksheet
Underpayment of Estimated Composite Tax Worksheet
Ohio Schedule E* Nonrefundable Business Credits

OHIO COMMERCIAL ACTIVITY TAX

The UltraTax Ohio-CAT program supports 1040, 1041, 1065, 1120, and 1120S entities. The program processes the commercial activity tax registration and year-end returns.

Ohio Forms and Schedules

Form 1—Commercial Activity Tax Registration
Form 12—Commercial Activity Tax Annual Return
Form 3C*—Account's Change in Mailing or Location Address Form
Form RTFS*—Request to File Separately
TBOR-1—Declaration of Tax Representative
Form AR*—ADD / Remove a Member To / From Group
Form ES*—Request to Change Election Status
Form FF*—Request to Change Filing Frequency
Form CR*—Request to Cancel / Reactivate Account
Form REF*—Application for Commercial Activity Tax Refund
Form DIST*—Commercial Activity Tax Annual Application for Distribution Center Qualifying Certificate and Ohio Delivery Percentage Certification

OHIO FIDUCIARY

Multi-State Processing

UltraTax /1041 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data. The system also automatically transfers non-resident income and taxes paid to the resident state for the calculation of credits as applicable.

Ohio Forms and Schedules

Form IT 1041—Fiduciary Income Tax Return
Form IT 1041ES—Estimated Income Tax Payment Coupon For Estates and Trusts
Form IT 1041EXT—Extension Payment Coupon for Estates and Trusts
Form IT 1140—Pass-through Entity and Trust Withholding Tax Return
Form IT-1140*—for Taxable Years Beginning in 2009
Form IT 1140ES—Estimated Withholding Tax Payment Coupon For Pass-through Entities and Trusts
Form IT 1140EXT—Withholding Tax Extension Payment Coupon for Pass-through Entities and Trusts
Form IT/SD 2210 Long—Interest Penalty on Underpayment of Ohio or School District Income Tax - Long Method
Form IT 2023—Income Allocation and Apportionment Nonresident Credit and Part-year Resident Credit
Form IT 4708*—Composite Income Tax Return for Certain Investors in a Pass-through Entity
Form IT 4708ES*—Estimated Tax Payment for Investors in Pass-through Entities

continued >

*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – OHIO, CONT.

Form IT 4708EXT*—Extension Tax Payment Coupon for Investors in Pass-through Entities
Form IT-4970—Trust Information Return
Form IT-4970 W/S*—Trust Accommodation Distribution Worksheet
Form TBOR-1—Declaration of Tax Representative
Schedule E*—Nonrefundable Business Credits
Schedule K-1 Equivalent—Beneficiary’s Share of Income, Additions, and Deductions
Grantor / Agency Report—Grantor’s Share of Income, Additions, and Deductions
Depreciation Adjustment Worksheet

OHIO ESTATE

The UltraTax/706 Ohio program processes estate returns for resident and nonresident U.S. decedents having assets both within and outside Ohio. It also automatically lists Ohio assets when the estate contains assets both inside and outside Ohio.

Ohio Forms and Schedules

Form ET 2—Ohio Estate Tax Return for all Resident Filings for Dates of Death on or after January 1, 2002
Form ET 2X*—Amended Ohio Estate Tax Resident Return
Form 4—Ohio Nonresident Estate Tax Return
Form 5—Ohio Estate and Additional Tax Return Filing Notice
Form ET 12—Application for Consent to Transfer Property or Other Interest of a Resident Decedent
Form ET 12-A—Application for Consent to Transfer Property or Other Interest of a Nonresident Decedent
Form 13—Application for Consent to Transfer the Proceeds of Insurance Contracts, Employer Death Benefits and Retirement Plans for Resident and Nonresident Decedents
Form ET 14*—Resident Tax Release
Form ET 14-A*—Nonresident Tax Release
Form 17—Ohio Estate and Additional Tax Estimated Payment Notice
Form 21*—Application for Certificate of Release of Ohio Estate Tax Lien
Form 22—Certificate of Estate Tax Payment and Real Property Disclosure for Dates of Death on or after November 8, 1990
Form ET 24—Application for Extension of Time to File Ohio Estate Tax Return
Form ET 34*—Qualified Farm Property Valuation Election Application
Form 35—Worksheet for Developing the Value of Qualified Farm Property

Form ET 41—Application for Extension of Time to Pay Ohio Estate Tax
Form ET 2 Schedule A—Real Estate
Form ET 2 Schedule B—Stocks and Bonds
Form ET 2 Schedule C—Mortgages, Notes and Cash
Form ET 2 Schedule D—Insurance
Form ET 2 E—Joint and Survivorship Assets
Form ET 2 F—Miscellaneous Property
Form ET 2 Schedule G—Transfers During Decedent’s Life
Form ET 2 Schedule H—Powers of Appointment
Form ET 2 Schedule I—Annuities, Pensions, Retirement and Other Employer Death Benefit Plans
Form ET 2 Schedule J—Debts and Administration Expenses
Form ET 2 Schedule K—Charitable Deduction
Form ET 2 Schedule L—Marital Deduction Reconciliation
Form ET 2 Schedule M—Bequests to Surviving Spouse

SUPPORT

You receive the same toll-free access to the Thomson Reuters Support HelpLine for state and local UltraTax CS products as you do for your federal UltraTax CS products.

MONEY-BACK GUARANTEE

All Thomson Reuters software is backed with a written money-back guarantee. If you are not completely satisfied with any fully licensed UltraTax CS product, return the software within the specified period for a refund.

PER-RETURN PRICING (PRP)

For your convenience, all UltraTax CS software is available on a per-return basis. UltraTax PRP offers a cost-effective way to handle states and entities that require a limited number of returns.

MORE INFORMATION

UltraTax CS products for Ohio are just part of the family of more than 150 UltraTax CS state and local programs. For more information, please call a Thomson Reuters Account Representative at **800.968.8900**.

*Denotes non-calculating form
**Denotes 1120 Consolidated form

