



2013 TOOLBOX CS, v.2013.1.2  
User Bulletin 8068: Software Update

January 16, 2014

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This user bulletin applies to all ToolBox CS<sup>®</sup> users, and describes changes made to this release of ToolBox CS.

## ENHANCEMENTS

### Tax Worksheets

The following tax worksheets have been added.

- Auto – Employer-Provided Cents-Per-Mile Method – 2014
- Auto Sale – Gain/Loss Standard Mileage Method – 2014
- Estate Tax – 2014
- Foreign Earned Income and Housing Exclusion – 2014
- IRA – Taxable Distribution When Contributions Made in Same Year – 2014
- Social Security – Taxable Benefit with IRA Deduction Phase-out – 2014

### Tax Flowcharts

The following healthcare flowcharts have been added.

- Cost Sharing Reduction Subsidy
- Employer Shared Responsibility Penalty
- Individual Premium Assistance Credit

### Client Handouts

With this release of ToolBox CS, your firm's company logo can be inserted into client handouts, providing for a more personal touch to the professional handouts currently in ToolBox CS. To find out more, please view [Inserting your company's logo into client handouts](#) in the Help and How-To Center.

## CHANGES

### Financial Calculators

The Gross to Net Paycheck and Net to Gross Paycheck financial calculators have been updated for 2014.

### Federal Forms

The following forms have been updated.

- Form 433-A (OIC) – Collection Information Statement for Wage Earners and Self-Employed Individuals
- Form 433-B (OIC) – Collection Information Statement for Businesses
- Form 433-D – Installment Agreement
- Form 656 – Offer in Compromise
- Form 1041-ES – Estimated Income Tax for Estates and Trusts – 2014
- Form 1045 – Application for Tentative Refund - 2013
- Form 1120-H – U.S. Income Tax Return for Homeowners Associations – 2013
- Form 4506-T – Request for Transcript of Tax Return
- Form 8716 – Election to Have a Tax Year Other Than a Required Tax Year
- Form 8809 – Application for Extension of Time to File Information Returns
- Form 8832 – Entity Classification Election

- Form 8867 – Paid Preparer’s Earned Income Credit Checklist
- Form 8868 – Application for Extension of Time To File an Exempt Organization Return
- Form 8919 – Uncollected Social Security and Medicare Tax on Wages – 2013
- Form 8952 – Application for Voluntary Classification Settlement Program (VCSP)
- Form 9465 – Installment Agreement Request
- Form W-4 – Employee’s Withholding Allowance Certificate - 2014
- Form W-4P – Withholding Certificate for Pension or Annuity Payments – 2014

## Tax Flowcharts

The Dependency Exemption tax flowchart has been updated to address a decision flow issue.

## Client Handouts

With this release of ToolBox CS, a firm information display issue on client handouts regarding the firm name and city, state, and zip code was addressed.

## Tax Worksheets

The following tax worksheets have been updated.

- Estate Tax – 2013
- Net Operating Loss (NOL) – Utilization of Carryover or Carryback
- Partner’s At-risk Basis
- Tax Benefit Rule – Refunds Previously Claimed as Itemized Deductions

With this release of ToolBox CS, the following tax worksheet issues have been addressed.

### Auto – Employer-Provided Annual Lease Value Method

A calculation issue with the *Prorate for period employee used during the year* field was addressed.

### Auto – Employer-Provided Cents-Per-Mile Method – 2013

A calculation issue with the *Amount to include in employee’s compensation for 2013* field was addressed.

### Social Security – Taxable Benefit with IRA Deduction Phase-out – 2013

A calculation issue with the worksheet’s Step 3 filing status thresholds was addressed.

### Foreign Earned Income and Housing Exclusion – 2013

A calculation issue with the *Foreign housing exclusion claimed* field was addressed.


### Tax Benefit Rule – Refunds Previously Claimed as Itemized Deduction

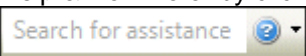
A calculation issue with where the taxable refund should be reported was addressed.

## HELP & SUPPORT

### ToolBox CS Help & How-To Center

For answers to questions on using ToolBox CS, access the Help & How-To Center by choosing Help >

Help & How-To or by clicking the  button and selecting a topic. You can also use the search

 field in the toolbar to search for topics. For more information, including sample searches, see [Finding answers in the Help & How-To Center](#).

### Product support

From the [Support Contact Information page on our website](#), you can complete a form to send a question to our Support team. To speak directly with a Support Representative, call (800) 968-0600, press **2** for Product Support, and listen to the available options. Normal weekday support is available from 9:00 a.m. to 8:00 p.m. eastern time. For additional details (including extended support hours for tax season and hours for other applications), visit the [Support section of our website](#). You can also access the Support

section from within ToolBox CS by choosing **Help > Additional Resources > General Support Information**.

### **Website resources and email subscriptions**

Visit [our website](#) to access the ARNE Community (an online user forum), to learn about training courses, to view blogs and articles, and more. You can access the website from within ToolBox CS by choosing **Help > On the Web > CS Professional Suite Home page**.

We issue software update notices via email. You can sign up to receive these notices by visiting the [My Account section of our website](#). You'll need to create a web account (if you don't already have one) and then sign up for the Email Subscription service where you can indicate which notices you want to receive.