THOMSON REUTERS

2015 TOOLBOX CS, v.2015.1.1
User Bulletin 8309: Software Update

January 12, 2016

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

ENHANCEMENTS

Client Handouts

The Sole Proprietors and Real Estate Individual client handouts have been added.

CHANGES

Federal Forms

The following forms have been updated.

- Form 56 – Notice Concerning Fiduciary Relationship
- Form 1041-ES – Estimated Tax for Estates and Trusts – 2016
- Form 1045 – Application for Tentative Refund – 2015
- Form 1120-H – U.S. Income Tax Return for Homeowners Associations
- Form 2848 – Power of Attorney and Declaration of Representative
- Form 8809 – Application for Extension of Time to File Information Returns
- Form 8867 – Paid Preparer's Earned Income Credit Checklist – 2015
- Form 8919 – Uncollected Social Security and Medicare Tax on Wages – 2015
- Form W-4 – Employee's Withholding Allowance Certificate – 2016
- Form W-4P – Withholding Certificate for Pension or Annuity Payments – 2016
- Form W-12 – IRS Paid Preparer Tax Identification Number (PTIN) Application and Renewal

Financial Calculators

The Gross to Net and Net to Gross Calculators have been updated for 2016.

Tax Organizers

All individual and business tax organizers including the 1040 Tax Organizer have been updated for 2015.

Tax Worksheets

The following tax worksheets have been updated for 2016.

- AGI-Sensitive Tax Items Projection Tool
- Foreign Earned Income and Housing Exclusion
- Auto – Employer-Provided Cents-Per-Mile Method
- Auto Sale – Gain/Loss Standard Mileage Method
- Individual Shared Responsibility Penalty

Required Minimum Distribution – Inherited IRA

An issue with the Required Minimum Distribution – Inherited IRA tax worksheet calculation of the applicable life expectancy factor was addressed.

Tax Flowcharts

The Individual Premium Assistance Credit, Inherited IRA – Death before Required Beginning Date, and Employer Shared Responsibility Penalty flowcharts have been updated for 2016.

Client Handouts

Client handouts have been updated for 2016 inflation adjusted amounts where necessary.

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 **0**, and request that a ToolBox CS representative return your call. 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.