



2016 TOOLBOX CS, v.2016.1.0
User Bulletin 8407: Initial Release

November 21, 2016

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

ENHANCEMENTS

Retrieve E-mailed Client Organizers

With this release of ToolBox CS, blank tax organizers sent via email to clients can be retrieved and stored in ToolBox CS. To restore completed tax organizers, the PDF attachment must be saved to an accessible folder. To retrieve in ToolBox CS, choose **File > Retrieve E-mail Organizer**. Browse to the location where the PDF attachment is saved. Click *Open*. Click *Retrieve*. ToolBox CS opens the retrieved organizer, allowing staff to review, make modifications, and save the organizer data to a specific client. For more information, see [this topic](#) in the Help & How-To Center.

The following tax organizers can be retrieved with this release.

- Airline Personnel
- Alien (Non-U.S. Citizen)
- Daycare Provider
- Direct Sellers
- Expatriate
- Farmers
- Gift Tax
- Long Haul Truckers and Overnight Drivers
- Oil and Gas Income and Deductions
- Realtors
- Corporation Short-form
- Partnership Short-form
- S-Corporation Short-form

Nonresident Alien Tax Organizer Integration with UltraTax CS

With this release of ToolBox CS, nonresident alien tax organizer information can be exported to 2016 UltraTax CS. Select data from the ToolBox CS organizer that is applicable to UltraTax CS input screens will be exported. To export, click the UltraTax CS icon in the toolbar of a completed nonresident alien tax organizer.

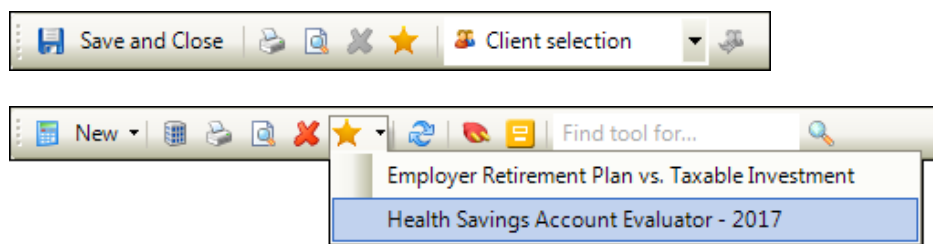


Staff will be prompted to acknowledge that the information in the client organizer is accurate and has been reviewed thoroughly. Upon opening the client in 2016 UltraTax CS, applicable ToolBox CS client

organizer information will be present on the *General*, *NRA* and/or *NRA-2* UltraTax CS input screens. For more information, see [this topic](#) in the Help & How-To Center.

Favorites

With this release of ToolBox CS, staff can designate tools as Favorites to provide quick access by adding or removing a gold star from individual tools used regularly on each tool's toolbar. *Favorite* tools are accessible directly from the drop-down list on the ToolBox CS toolbar by clicking the arrow next to the *Favorites* icon.



For more information, see [this topic](#) in the Help & How-To Center.

Search

With this release of ToolBox CS, a new search feature is accessible from the ToolBox CS toolbar. When you click the magnifying glass icon, ToolBox CS searches the current collection of available calculators, flow charts, forms, handouts, organizers, and worksheets for tools that match the text entered in the toolbar. For more information, see [this topic](#) in the Help & How-To Center.

CHANGES

Federal Forms

The following forms have been updated.

- Form 966 – Corporate Dissolution and Liquidation
- Form 4419 – Application for Filing Information Returns Electronically (FIRE)
- Form 4868 – Application for Automatic Extension of Time to File U.S. Individual Income Tax Return
- Form 8809 – Application for Extension of Time to File Information Returns
- Form 8919 – Uncollected Social Security and Medicare Tax on Wages – 2016
- Form 8951 – Compliance Fee for Application for Voluntary Correction Program (VCP)
- Form 12509 – Statement of Disagreement
- Form W-7 – Application for IRS Individual Taxpayer Identification Number
- Form W-10 – Dependent Care Provider's Identification and Certification

Financial Calculators

The Health Savings Account Evaluator and Marginal Tax Rate Calculator have been updated for 2017.

Tax Worksheets

The following tax worksheets have been updated for 2017.

- 401(k) Plan – Contributions to Individual (Solo) 401(k)
- AGI-Sensitive Tax Items Projection Tool
- Estate Tax
- Foreign Earned Income and Housing Exclusions
- IRA – Allowable Contribution Options

- SEP –Sole Proprietor’s Contribution
- SIMPLE IRA Plan – Sole Proprietor’s Contribution
- Social Security – Taxable Amount with IRA Deduction Phase-out
- Sole Proprietor – Hiring your Dependent Child



Tax Flowcharts

All 2017 tax flowcharts have been updated.

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 and follow the prompts to have 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 Tax & Accounting 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 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.