



2017 TOOLBOX CS, v.2017.1.0  
User Bulletin 8507: Initial Release

November 20, 2017

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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

### Farmer and Realtor Tax Organizer integration with UltraTax CS

With this release of ToolBox CS, farmer and realtor tax organizer information can be imported into 2017 UltraTax CS. Select data from the Toolbox CS organizer that is applicable to UltraTax CS input screens will be imported. To import, click on the *UltraTax CS icon* in a completed farmer or realtor tax organizer's toolbar.



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 2017 UltraTax CS, applicable ToolBox client organizer information will be present on the *Business > C and C-2, or Farm > F and F-2* UltraTax CS input screens. For details, see [Exporting nonresident alien tax organizer information to UltraTax CS](#).

The nonresident alien tax organizer integration, *released in 2016*, has been updated for 2017.

### Accept and reject retrieved e-mailed Client Organizer information

With this release of ToolBox CS, staff can accept and reject all or individual line items from retrieved tax organizers sent via e-mail 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 was saved. Click *Open*. Click *Retrieve*. ToolBox CS will open the retrieved organizer allowing staff to review, make modifications, and save the organizer data to a specific client. For details, see [Retrieving an email organizer](#).



### Social security and employer identification masking

With this release of ToolBox CS, staff have an option to mask the social security number or an employer identification number on printed or e-mailed client federal forms or tax organizers. For details, see [Staff dialog](#).

## Password protected blank Client Organizers

With this release of ToolBox CS, blank client organizers saved to a client are password protected by default by the Taxpayer Identification Number. To change the Adobe Acrobat PDF security, click the *Firm* icon in the main ToolBox CS toolbar or choose **Go > Firm** and click the PDF Security tab.

The screenshot shows a dialog box titled "PDF Security" with two tabs: "Firm Info" and "PDF Security". The "PDF Security" tab is selected. Inside the dialog, there is a section titled "PDF Delivery password" with the following text: "ToolBox CS can generate passwords for clients receiving PDF delivery of tax organizers by combining the fields below. Choose between 1 and 3 fields." Below this text are three checkboxes: "Taxpayer Identification Number (SSN/EIN)" (checked), "Phone number (7 digits only)", and "Zip code (5 digits only)". Below the checkboxes is the text: "Passwords are generated using only numbers and a '+' sign. Example: TIN and Zip code would yield password: 111223333+11122". At the bottom left is a checkbox "Include password with \$Global client" and an empty text field. At the bottom are "OK" and "Cancel" buttons.

Staff can select 1 to 3 options each based on client demographic information. If tax organizers are saved to the \$Global client, by default, e-mailed blank client organizers will not be password protected; however, staff can assign a firm password to the \$Global client. A short, editable message will appear in the blank organizer e-mail describing password criteria. For details, see [Firm dialog](#).

## ToolBox CS Home Page

With this release of ToolBox CS, the ToolBox CS Home Page displays recently used tools that can be opened or deleted, the selected current staff member, the ability to add staff or change current staff options including the option to *Display the Home Page upon opening ToolBox CS*, tools marked as favorites, timely product notices curated by Thomson Reuters Tax & Accounting, and helpful support and research links. For details, see [Using the ToolBox CS Home Page](#).

## ToolBox CS login security – Inactivity sign-on dialog

With this release, the ability to close the ToolBox CS program from the inactivity sign-on dialog is available in certain situations. The option will be available if no tool or dialog is open. Prior to this release, the ability to close the ToolBox CS program was never available from the inactivity sign-on dialog.

## Federal form proforma

With a future release of ToolBox CS, staff will have an option to proforma the previous information entered on certain federal forms updated by the IRS. To proforma, click on the *Proforma* icon in a blank updated federal form.

## CHANGES

### Federal forms

The following forms have been updated.

- Form 56 – Notice Concerning Fiduciary Relationship
- Form 4506 – Request for Copy of Tax Return

- Form 4506-T – Request for Transcript of Tax Return
- Form 4506T-EZ – Short Form Request for Individual Tax Return Transcript
- Form 4852 – Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
- Form 4868 – Application for Automatic Extension of Time to File U.S. Individual Income Tax Return - 2017
- Form 8716 - Election To Have a Tax Year Other Than Required Tax Year
- Form 8944 - Preparer e-file Hardship Waiver Request
- Form I-9 – Employment Eligibility Verification
- Form W-8BEN – Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)
- Form W-8ECI - Certificate of Foreign Person's Claim That Income Is Effectively Connected With the Conduct of a Trade or Business in the United States
- Form W-12 – IRS Paid Preparer Tax Identification Number (PTIN) Application and Renewal

### **Health Care forms**

The following forms have been updated.

- Application for exemption from the Shared Responsibility Payment for Individuals who are Unable to Afford Coverage and are in a State with a Federally Facilitated Marketplace
- Application for exemption from the Shared Responsibility Payment for Individuals who are Unable to Afford Coverage and are in a State with a State-based Marketplace
- Application for exemption from the Shared Responsibility Payment for Individuals who experience hardships
- Application for Health Coverage & Help Paying Costs
- Application for Health Coverage & Help Paying Costs – Extra Persons
- Application for Health Coverage & Help Paying Costs - Instructions
- Application for Health Coverage – Financial Assistance
- Application for Health Coverage – Financial Assistance Instructions
- Application for Health Coverage & Help Paying Costs (Short Form)
- Application for Health Coverage & Help Paying Costs (Short Form) Instructions

### **Financial Calculators**

The Health Savings Account Evaluator and Marginal Tax Rate Calculator have been updated for 2018.

### **Tax Worksheets**

The following tax worksheets have been updated for 2018.

- 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 Organizers**

The following tax organizers have been updated.

- 1040 Tax Organizer - 2017
- Nonresident Alien
- Farmer
- Realtor


### Tax Flowcharts

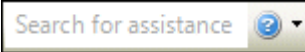
All 2018 tax flowcharts have been updated.

## 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.