



2018 TOOLBOX CS, v.2018.1.0  
User Bulletin 8600: Initial Release

November 19, 2018

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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


### Long Haul Truckers and Overnight Drivers and Direct Sellers Tax Organizer integration with UltraTax CS

With this release of ToolBox CS, you can export select data applicable to UltraTax CS input screens from the **Long Haul Truckers and Overnight Drivers** or **Direct Sellers** tax organizers to 2018 UltraTax CS. To export, click the *UltraTax CS icon* in the toolbar of a completed **Long Haul Truckers and Overnight Drivers** or **Direct Sellers** 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 2018 UltraTax CS, applicable ToolBox client organizer information will be present on the *Business > C and C-2* UltraTax CS input screens. For details, see [Exporting tax organizer information to UltraTax CS](#).

### Tool Comments

With this release of ToolBox CS, staff can click the tool comments  button in the toolbar of an open tool (except Office Documents) to enter specific comments that provide additional information about that tool. Staff can also print the comments for client or preparer reference. Tool comments are included in the tool's print collation. For more information, see [Entering tool comments](#).



### Client Security

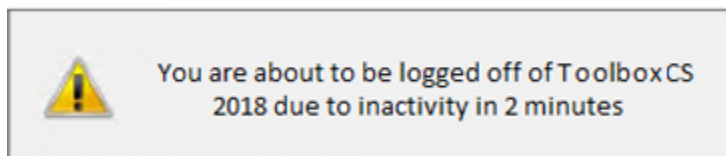
With this release of ToolBox CS, staff have an option to password-protect a client's saved tools. Staff can enable the client password on the new tab Security available on the Client screen. Staff will be prompted when entering a tool, but will not be prompted to enter a correct password twice while working inside ToolBox CS for no longer than 30 minutes. For more information, see [Clients](#).

### Sign-in Authentication Enhancements

This release of 2018 UltraTax CS includes enhancements to improve the sign-in authentication process. These enhancements include a warning when Caps Lock is enabled, a warning when you're about to be

logged out for inactivity, and automatic reauthentication when you restart UltraTax CS after applying software updates.

The inactivity warning displays two minutes before your authenticated session expires, prompting you to keep your current session active by using your mouse or keyboard within UltraTax CS. If the application doesn't detect any activity in that two-minute timeframe, then you will be signed out of UltraTax CS and will need to log in again.



### Thomson Reuters Authenticator Display Card

Thomson Reuters Authenticator Display Cards provide CS Professional Suite and Onvio customers with an additional multi-factor authentication (MFA) method. These devices are the size of a credit card, and enable users to implement MFA without installing an authenticator app on a mobile device, or as a backup method that you can use in case of a lost or broken mobile device.

You can use the display card to verify your account when you log in to ToolBox CS. When ToolBox CS prompts you to verify your account via MFA, use the Thomson Reuters Authenticator Display Card to generate a six-digit numerical code, and then enter that code in the authentication prompt.

For more information, see [Learning about multi-factor authentication devices](#). For details on pricing and ordering, [visit the Forms CS website](#).



## CHANGES

### Federal forms

The following forms have been updated.

- Form 1139 – Corporation Application for Tentative Refund
- 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 – 2018
- Form 5558 – Application for Extension of Time To File Certain Employee Plan Returns
- Form 8288 – U.S. Withholding Tax Return for Dispositions by Foreign Persons of U.S. Real Property Interests
- Form 8332 – Release/Revocation of Release of Claim to Exemption for Child by Custodial Parent
- Form 8944 – Preparer e-file Hardship Waiver Request
- Form 12509 – Statement of Disagreement
- Form W-9 – Request for Taxpayer Identification Number and Certification
- 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 2019.

### Tax Worksheets

The following tax worksheets have been updated for 2019.

- 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 added.

- Direct Seller
- Long Haul Trucker and Overnight Drivers


### Tax Flowcharts


All 2019 tax flowcharts have been updated except for the Earned Income Credit and Withholding – Exemption flowcharts.

## 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.