



2020 TOOLBOX CS, v.2020.1.0

User Bulletin: Initial Release

November 23, 2020

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

CHANGES

The financial calculators listed below have been updated for numbers that are indexed for inflation. We updated the features based on the most recent information and guidance released by the IRS regarding the numbers to keep these features compliant for the next year of calculations.

Federal forms

The following forms have been updated to comply with tax law changes or updated versions of forms released by the IRS.

- 656 – Offer In Compromise
- 433-A – Collection Info. For Wager Earners and Self-Employed
- 433-A (OIC) – Collection Info. For Wage Earners and Self-Employed
- 433-B (OIC) – Collection Info. For Businesses
- 433-D – Installment Agreement
- 656-PPV – Offer in Compromise Partial Payment Voucher
- 673 – Exemption from Withholding on Eligible FEI
- 911 – Application for Taxpayer Assistance Order
- 1310 – Person Claiming Refund Due Deceased
- 2290 – Heavy Highway Vehicle Use Tax Return
- 3911 – Taxpayer Stmt. Regarding Refund
- 4419 – Application for Filing Information Returns Electronically
- 4506 – Request for Copy of Tax Return
- 4768 – App. For Extension of Time to File U.S. Estate Taxes
- 4852 – Substitute for Form W-2, or Form 1099-R
- 8288-B – Application for Withholding Foreign Persons
- 8809 – Application for Extension of Time to File Info Return
- 9465 – Installment Agreement Request
- 12153 – Request for Collection Due Process
- 12203 – Request for Appeals Review
- 12256 – Withdrawal Request for Collection
- SS-5 – Application for a Social Security Card
- W-10 – Dependent Care Provider’s ID and Certification
- W-12 – IRS Paid Preparer Tax ID Number

Financial calculators


The following financial calculators have been updated for 2020.


- Gross to Net Paycheck
- Health Savings Account Evaluator
- Marginal Tax Rate Calculator
- Net to Gross Paycheck

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, 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.