



2011 TOOLBOX CS, v.2011.1.0
User Bulletin 6843: Initial Release

November 2, 2011

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

ENHANCEMENTS

Firm Information

ToolBox CS has added a new Firm dialog that contains firm-specific information for forms and documents. Accessible as a toolbar shortcut and from the Go menu (CTRL + 6), the dialog's fields include: EIN, EFIN, Website, Phone, and Fax. These fields, in addition to a firm's license information, are used to populate forms and documents where firm information is necessary.

Staff Information

In addition, Toolbox CS has added a Staff dialog that contains fields that transfer staff-specific information to forms and documents. The Staff dialog includes fields for personal information, professional information such as SSN, PTIN and CAF number, and address information. Once a default staff member is established, Staff dialog fields will populate forms where preparer information is necessary, as well as identify staff on documents. There are also three print options that when marked, provide additional form information: Self-employed, Third-party designee, and Print preparer's name in signature block where allowed. The Staff dialog shortcut is available from the Go menu (Ctrl + 5) and as an option in the Navigation pane.

CHANGES

Calculators

The Hiring Your Dependent Child, Individual 401(k) Contributions, IRA Phaseout, Health Savings Account Evaluator, Estate Tax, and Marginal Tax Rate calculators have been updated for 2012. The remaining year-specific calculators will be updated when the tax code for 2012 becomes more certain.

Flowcharts

All 2012 flowcharts have been updated except Exemption from Withholding. This flowchart will be updated when the tax code for 2012 becomes more certain.

Forms

Form W-10 – Dependent Care Provider's ID and Certification was updated.
Form W-12 – IRS Paid Preparer Tax Identification Number (PTIN) was updated.
Form 2290 – Heavy Highway Vehicle Use Tax Return was updated.

SUPPORT

ToolBox CS help

For step-by-step procedures, refer to the ToolBox CS help topics. To learn how to use the help, choose Help > ToolBox CS Help Topics, click the Index button, enter **help**, and click "via help topics."

Website

If you have questions or need assistance, you can visit our website at CS.ThomsonReuters.com 24 hours a day for access to our support knowledgebase and for the latest information on current issues and processing tips. To take advantage of this convenient means of accessing information, choose Help > On the Web > Product Support And Services.

Email subscriptions

We issue software update notices via email. If you want to receive these notices, you must have an email account and sign up for the email subscription service. To sign up for the email subscription service, visit the My Account section of our website at CS.ThomsonReuters.com. (Note that you must create a website account to sign up for email subscriptions.)

Product Support

To speak with a Product Support Representative, please call CS Support at (800) 968-0600, press **2** for Product Support, and then listen to the available options. Normal weekday support is available from 9:00 a.m. to 8:00 p.m. eastern time. For details on our support hours for all CS Professional Suite[®] applications, please visit the Support section of our website (accessible from within ToolBox CS by choosing Help > On the Web > Product Support And Services).