



2012 TOOLBOX CS, v.2012.1.0  
User Bulletin 7848: Initial Release

November 7, 2012

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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

### Forms

Forms that require staff information can now be updated while editing a form, via a drop-down menu similar to the Clients drop-down menu. In the instance of Form 2848 — Power of Attorney and Declaration of Representative, multiple staff members can be added to the form by using the new drop-down menu. See [Setting a default staff member](#) in the Help and How-To Center for further details.

The following forms have been added.

- Form 4419 — Application for Filing Information Returns Electronically (FIRE)
- Form 8822-B — Change of Address – Business
- Form 8944 — Preparer e-file Hardship Waiver Request
- Form 12203 — Request for Appeals Review
- Form 12256 — Withdrawal of Request for Collection Due Process or Equivalent Hearing

### Calculators

The Cash Flow Forecast calculator now includes right-click mouse functionality to insert rows in the forecast table, similar to the functionality in the Record of Loan Payments and Rate Changes and Investment Analysis calculators.

### Staff

The Staff dialog now provides a print option to include the current date, form permitting, in the preparer signature block.

### Help & How-To Center

The new Help & How-To Center provides one-stop access to the information you need while using ToolBox CS. We've combined all content from the help system and the Support knowledgebase into a single repository that is hosted on our website and accessible directly from within ToolBox CS.

Because the Help & How-To Center resides on our website, we can update and expand content between releases based on your feedback, searches, and questions. In addition, the Help & How-To Center offers several significant enhancements.

- A much more robust search engine that provides relevant search results quickly.
- New search options that allow you to search all ToolBox CS topics at once, to limit the search by one or more subject categories, or to search for information on another application without having to open that application.
- Full compatibility with your preferred browser so that you can use your browser's regular features to navigate, search, print, and bookmark the topics you visit most often.

### Notes

- An active internet connection is required to access the Help & How-To Center.

- For more information (including some sample searches you can try), see [Finding answers in the Help & How-To Center](#).

## 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 2013. The remaining year-specific calculators will be updated when the tax code for 2013 becomes more certain.

### Flowcharts

All 2013 flowcharts have been updated.

### Forms

The following forms have been updated.

- Form 433-F — Collection Information Statement
- Form 4768 — Application for Extension of Time to File a Return and/or Pay U.S. Estate Taxes
- Form 4868 — Application for Automatic Extension of Time to File U.S. Individual Income Tax Return
- Form 5558 — Application for Extension of Time to File Certain Employee Plan Returns
- Form 8300 — Report of Cash Payments Over \$10,000 Received In a Trade or Business
- Form W-12 — IRS Paid Preparer Tax Identification Number (PTIN) Application and Renewal

### System

- With this release, ToolBox CS has been updated for compatibility with the Microsoft® Windows® 8 operating system and for version 4.0 of the Microsoft .Net Framework.
- SQL Server® 2008 R2 Express is now installed when you choose to install a new instance of SQL Server during ToolBox CS installation.

**Note:** ToolBox CS SQL Server 2008 R2 Express database backups are not backwards compatible with ToolBox CS SQL Server 2005 Express edition databases.


## SPECIAL INFORMATION


The IRS has discontinued Form 8633 — Application to Participate in the IRS e-file program. Applications to participate in the e-file program must be submitted online at [IRS.gov](http://IRS.gov). This form no longer appears in Forms; however, previous copies of this form are retained in ToolBox CS.

## 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 with a Support Representative, call (800) 968-0600, press **2** for Product Support, and listen to the available options. 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 ARNE 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 software 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.

