

2021 ULTRATAX CS, v.2021.1.0 User Bulletin UT-21.1.0: Initial Release

November 22, 2021

This user bulletin describes special information related to UltraTax CS Platform.

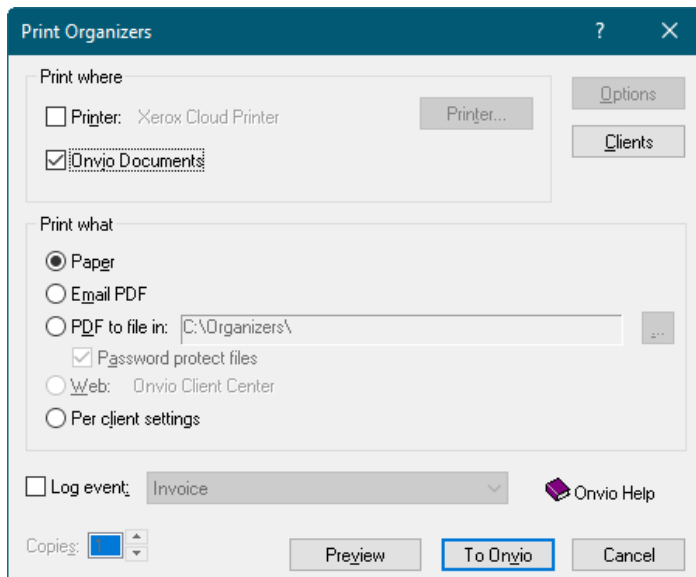
ENHANCEMENTS

Datasharing performance enhancement (Virtual Office users only)

Firms operating in the virtual office environment should experience enhanced performance for datasharing functionality. Firms that specialize in tax returns with common employers or issuers of tax documents which results in substantial duplication of the same EIN in many returns throughout their database may have experienced slow datasharing previously.

Printing organizers to Onvio Documents

Organizers can now be printed to Onvio Documents (if licensed) with the new Onvio Documents checkbox on the File > Print Organizers dialog. To print organizers for one client or in batch, clear the Printer checkbox, mark the Onvio Documents checkbox, and select the clients that you would like to print organizers for within the Clients button. Once the desired clients are selected, click the To Onvio button at the bottom of the dialog.



Note: Only clients with a selected Organizer Delivery type of *Paper*, *Email (PDF)*, or *File (PDF)* within Setup > Client Communications dialog can be printed using this option.

Populate spouse contact to Onvio when no email address is present

When populating clients and contacts to Onvio Firm Management (if licensed) for 1040 UltraTax CS clients, the spouse contact will now be automatically populated without the requirement of an email address entered in the Spouse email address field located on the General > Contact input screen. Client and contacts can be populated to Onvio from within the Onvio Integration dialog which is accessible by selecting Utilities > Onvio and then Integration. Select the appropriate clients to the Clients selected pane and click *Continue* to begin the populate process.

Populate clients and contacts to Onvio for 709 clients

Clients and contacts for 709 UltraTax CS clients can now be populated to Onvio Firm Management (if licensed). From within the Onvio Integration dialog which is accessible by selecting Utilities > Onvio and then Integration, select the appropriate clients to the Clients selected pane and click *Continue* to begin the populate process.

Create Onvio tax return projects for 5500 clients

Tax return projects for 5500 UltraTax CS clients can now be created to Onvio Firm Management (if licensed). From within the Onvio Integration dialog, accessible by selecting Utilities > Onvio and then Integration, select the appropriate clients to the Clients selected pane, mark the checkbox option to *Create Onvio project for UltraTax CS client*, and click *Continue*. A tax return project will be created within Onvio for the selected clients with an Application type of UltraTax CS and the appropriate entity type based upon Onvio project templates if one does not already exist.

Reset Onvio Link for UltraTax CS

A new button, *Reset Onvio Link*, has been added to the Clients tab within the Help > Repair dialog and will enable when UltraTax CS is setup for integration with Onvio (if licensed). This feature is intended for use in scenarios where your UltraTax CS client has unexpectedly matched with an existing Onvio client due to having the same email address(es) and/or TINs. Use this button to break the match between the two clients. Manually update the email address or TIN within your UltraTax CS or Onvio client or contact and then attempt to populate or print the client from UltraTax CS to Onvio again.

CHANGES

Partial disposition of MACRS property

For tax years 2021 and later, you can now mark an asset as a Partial disposition of MACRS property when an asset is disposed of using the method Sold/Scrapped.

Iowa bonus depreciation

Iowa now fully conforms with bonus depreciation under IRC 168(k) for property placed in service in 2021 or a later tax year.

Solar energy credit construction began in 2020 - 2023

With this release, you can select code **U** from the Credit menu for the solar energy credit when the construction began in 2020 through 2023.

SPECIAL INFORMATION

Onvio 1040 Organizers

The Web option to generate 1040 organizers for transmission to Onvio Client Center (if licensed) located on the Print Organizers dialog has been delayed and will be enabled in a future release. Changes are being made due to recent tax law changes. More information regarding its release will be available as soon as possible.

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 UltraTax CS and again if you transmit returns for e-filing. When UltraTax 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 details on pricing and ordering, [visit the Forms CS website](#).

