



## 2018 PLANNER CS, v.2018.1.0 User Bulletin 8599: Initial Release

November 19, 2018

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This user bulletin describes enhancements and changes made to this release of Planner CS,<sup>®</sup> and special information related to scheduled 2018 Planner CS update releases.

### ENHANCEMENTS

#### Print to PDF

With this release of Planner CS, you can create and save PDFs of plan reports, graphs, .DOC client letters, and IRS forms 1040-ES and W-4. With a plan open, choose File > Print Reports or File > Print Forms and mark the *PDF to File* checkbox. You can view PDFs with Adobe Acrobat version 4.0 or higher.

#### Show absolute value of data in client letter

With this release of Planner CS, you can assign a positive value to data with a negative value in a client letter. With a plan open, choose Reports > Client Letters-.RTF or -.DOC, and then choose Planner Data > Variables - Show absolute value. This will switch negative amounts to positive amounts without affecting the actual plan data.

#### CS Connect update

This release includes an update to CS Connect. When you apply updates to a network installation of Planner CS, CS Connect will alert you if one or more users are currently using Planner CS. Choose File > CS Connect to open the updated CS Connect dialog.

#### Improvements to the Find Field feature

With this release of Planner CS, the Find Field feature includes common federal and state abbreviations. For example, a search on the word "deduction" will find data-entry fields with abbreviations such as "dedn" and "ded." To use the Find Field feature, choose Edit > Find > Field.

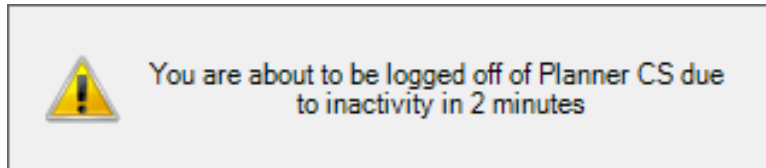
#### Credit for taxes paid to a nonresident state

With this release of Planner CS, you can calculate the credit for taxes paid to a nonresident state for Alabama, Illinois, Kansas, and Michigan. For a resident state plan, the credit calculates for up to two attached nonresident states. For further information on entering a credit for taxes paid to a nonresident state, see [Credit for taxes paid to other states](#).

#### Sign-in authentication enhancements

This release of Planner 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 Planner 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 Planner CS. If the application doesn't detect any activity in that two-minute timeframe, then you will be signed out of Planner CS and will need to log in again.



### **Thomson Reuters Authenticator Display Card**

The Thomson Reuters Authenticator Display Card provides CS Professional Suite and Onvio customers with an additional multi-factor authentication (MFA) method. This display card is the size of a credit card, and enables users to implement MFA without installing an authenticator app on a mobile device. It can also serve as a backup method in case of a lost or broken mobile device.

You can use the display card to verify your account when you log in to Planner CS. When Planner CS prompts you to verify your account via MFA, press the symbol on 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**

### **Retirement plan limits increased for tax year 2019**

The self-employed retirement plan calculations are updated for 2019 cost-of-living adjustments. Refer to the federal Adjustments > TP Keogh/SEP and SP Keogh/SEP tabs for these changes.

### **Itemized deductions – State and local income taxes**

The Taxes Paid section of the federal Deductions > Deductions Pg 1 tab has been revised with this release of Planner CS. For tax years 2018 through 2025, only state/local income or sales taxes, real estate taxes, and personal property taxes will be subject to the \$10,000 cap on state and local taxes. Previously, Planner CS applied the \$10,000 cap to all taxes claimed as an itemized deduction, including amounts entered in the *Foreign taxes* and *Other taxes* fields on the Deductions Pg 1 tab.

### **2019 Social Security wage base**

Planner CS is updated to include the 2019 Social Security wage base amount of \$132,900. Refer to the *Social Security wages* field on the federal Income > Wages tab for this change.

### **Qualified business income deduction, net capital gain**

With this release, Planner CS calculates the *Net capital gain* field on the Deductions > QBI Deduction tab as the sum of allowed capital gain or loss on the Income > Income tab and qualified dividends entered on the Income > Int/Div tab, as long as the sum of these amounts is not less than zero. Previously, Planner CS calculated *Net capital gain* based on line 4 of the Other Taxes > Cap Gain Tax tab.

### **State updates**

All state modules are updated with the most recent information available at the time of this release.

## **SPECIAL INFORMATION**

### **Planner CS update releases**

You can update 2018 Planner CS via CS Connect™ through October 2019. If you have an active internet connection, the Notices section of the Planner CS Home Page alerts you whenever an update is available. To download and apply updates, choose File > CS Connect, mark the *Retrieve available updates* checkbox, and click the *Call Now* button.

### **2018 UltraTax CS integration**

You can import data from 2018 UltraTax CS® with a Planner CS update release in February 2019. You must have version 2018.3.0 of UltraTax CS to enable importing to Planner CS.

**Note:** This release of Planner CS can import data from UltraTax CS years 2017 and earlier.

### **2018 GoSystem Tax RS integration**

You can import data from 2018 GoSystem® Tax RS with an upcoming Planner CS update release in March or April 2019.

### **Minor child tax calculations**

Until a future update, the federal income tax calculation for a minor child who has unearned income is temporarily disabled. For tax years 2018 through 2025, Planner CS will not calculate federal income tax if the *Subject to minor child rules?* checkbox on the Main > Exemptions tab is marked *Yes*. The future update will include the tax calculations for a minor child as revised by the 2017 Tax Cuts and Jobs Act (TCJA), which will apply the estate/trust ordinary and capital gains tax rates to the net unearned income of a minor child for tax years 2018 through 2025.

### **Planner CS state calculations and TCJA**

The TCJA includes a wide range of federal individual tax law changes that will affect state taxation. State agencies are working to establish guidance as to how individual states will account for these changes; therefore, you should carefully review state tax plans for the effects of the TCJA, and edit your state plan accordingly.