

5500 INTERIM RELEASE NOTES FOR 19-8.9F

Date of Release: 10/1/2021

This document provides interim release notes and known issues for 5500, version 19-8.9F. This also includes cumulative addressed issues for prior interim updates to the 19-6F release.

IMPORTANT INFORMATION

Click these links for important information on using the system:

- [5500: Important Information \(page 3\)](#)
- [Freeing Returns \(page 6\)](#)
- [Disabling and Clearing AutoFill Information in your Browser \(page 7\)](#)
- [projected 2020 updates and release information.](#)

NEW FOR THIS RELEASE

Forms Status

View the list of federal forms at this URL:

https://www.riahelp.com/html/2019/reports/fedforms/5500_Federal_Form_Status.pdf

OPEN ISSUES

Please see Customer Center for up-to-date information on post-release known issues.

CLOSED ISSUES

19-8.9F We corrected the print to include Schedule C, Page 3.

CLOSED ISSUES ON PRIOR RELEASES

E-file

19-6.3F We added e-file diagnostics for Form 8955-SSA, line 6 to ensure proper information is included in the return prior to electronic file creation.

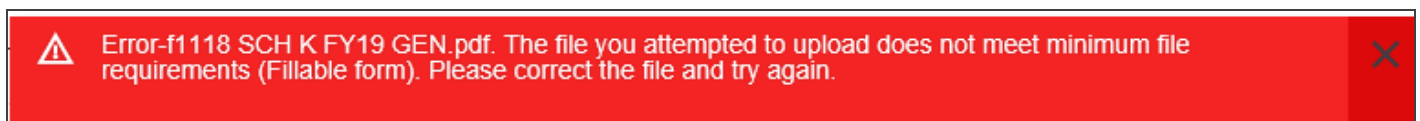
Schedule R

19-8.7F We corrected the form text for line 8, Part II of Schedule R.

5500: IMPORTANT INFORMATION

ATTACHING PDFS AS E-FILE ATTACHMENTS WHEN YOU GET AN ERROR MESSAGE

Organizer is currently not supporting PDFs with fillable forms or password protected PDFs as e-file attachments. When you try to upload a PDF file with fillable forms you get the following error message:



Follow the steps below when you get this error.

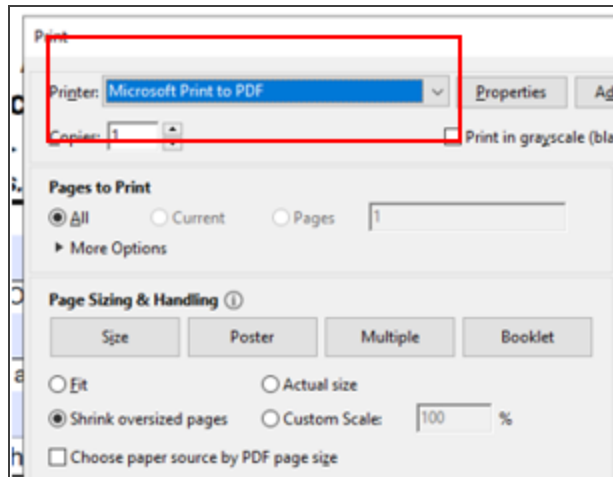
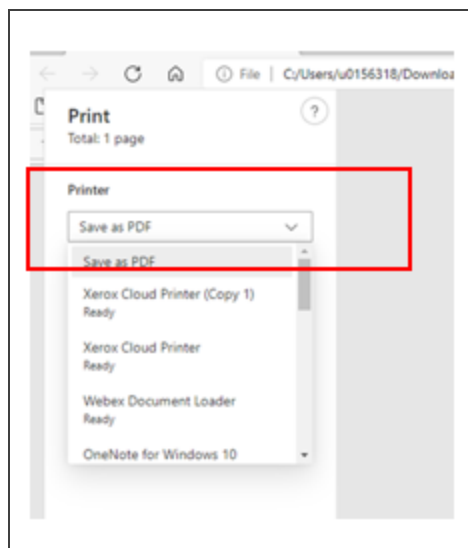
Uploading a PDF as an E-file Attachment when you get the Error Message

1. Open the PDF you are trying to attach.
2. Click **Print** or the key combination **Ctrl + P** to open the print window.

5500: Important Information

Attaching PDFs as E-file Attachments When You Get an Error Message

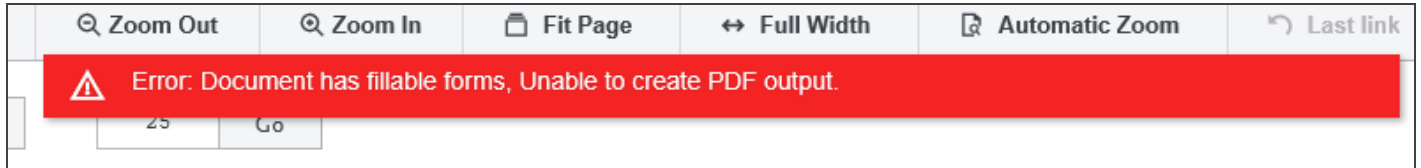
- From the **Printer** drop-down list, select **Microsoft Print to PDF** or **Save as PDF** if you opened the PDF from the browser.

PDF is opened in Adobe Reader**PDF is opened in a Browser**

- Click **Print** and save the PDF to your computer.
- Reattach the PDF as an E-file attachment.

Printing a Return when you get an Error Message

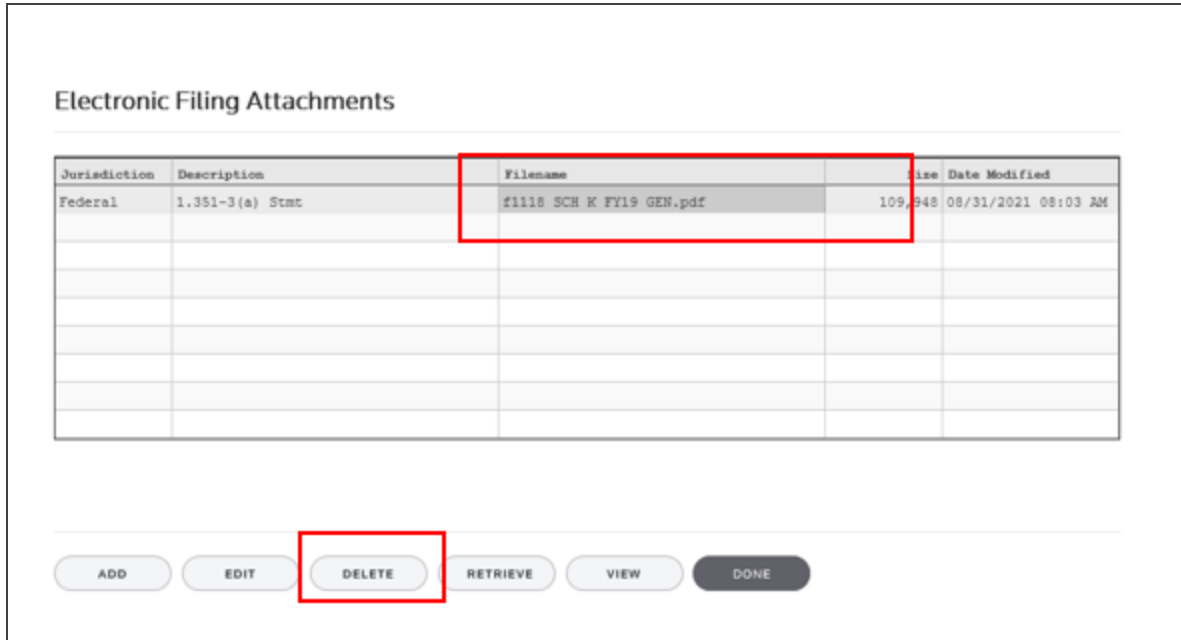
Use the following steps when you get this message when printing a return or when you select **SEND TO PDF**.



1. Identify the PDF which has fillable forms that is attached as e-file attachment. It should look like this:

Form 1118 (Rev. December 2018) Department of the Treasury Internal Revenue Service		Foreign Tax Credit—Corporations ▶ Attach to the corporation's tax return. ▶ Go to www.irs.gov/Form1118 for instructions and the latest information.				OMB No. 1545-0123
For calendar year 20		or other tax year beginning FEBRUARY 1 , 20 18 , and ending JANUARY 31 , 20 19				Employer identification number 77-0105228
Name of corporation						
THIS IS A FILLABLE FORM WHICH MEANS YOU CAN EDIT FIELDS IN PDF BY PLACING YOUR CURSOR						
Use a separate Form 1118 for each applicable category of income (see instructions).						
a Separate Category (Enter code—see instructions) ▶ FB b If code 901j is entered on line a, enter the country code for the sanctioned country (see instructions) ▶ c If code RBT is entered on line a, enter the country code for the treaty country (see instructions) ▶						
Schedule A Income or (Loss) Before Adjustments (Report all amounts in U.S. dollars. See Specific Instructions.)						
1. EIN or Reference ID Number (see instructions)*	2. Foreign Country or U.S. Possession (enter two-letter code—use a separate line for each) (see instructions)	3. Inclusions Under Sections 951(a)(1) and 951A (see instructions)				5. Interest
		(a) Exclude Gross-Up	(b) Gross-Up (section 78)	(a) Exclude Gross-Up	(b) Gross-Up (section 78)	
A	BR					
B	JA					
C	CA					
Totals (add lines A through C)						
6. Gross Rents, Royalties, and License Fees	7. Sales	8. Gross Income From Performance of Services	9. Section 986(c) Gain or Loss	10. Section 987 Gain or Loss	11. Section 988 Gain or Loss	12. Other (attach schedule)
A		1,506,246				-1,141
B		2,783,020				-7,588
C						528,467
Total		4,289,266				519,738
14. Allocable Deductions						

2. Click **Delete** to remove the PDF file from the e-file attachments.



3. Follow the steps above for *Uploading a PDF as an E-file Attachment when you get the Error Message*.
4. Select **Print** or **Send to PDF**. Your file should print or save as a PDF without any issues.

FREEING RETURNS

If a return shows as open even though all users have it closed, follow these steps to free the locator:

1. In the RS Browser, go to **Returns** and search for the locator.
2. Put a check by the locator and click **Info**.
3. Click **Free**.
4. Click **OK** to the message: *This process will cancel all open returns on this machine. Do you want to continue freeing this locator?*



Clicking **Free** will close all locators that are open without regard to entity type or tax year. It will not affect other workstations that may have had the locator open.

If utilizing the **Free** button outlined above does not free your return, email GoSystemFreeRequest@thomsonreuters.com with the information in the email template shown below between the lines, and a member of our free team will free your locator. Make sure all users have closed the return prior to submitting the request.

The subject of the email should be *GoSystem Tax RS Remote Free Request*.

Copy and paste the following into the body of the email, and enter the requested information:

Please attempt a Remote Free of the following return.

4 Digit Account Number:

Locator Number:

Tax Year:

Tax Type:

**1120 & 1065 Only: Is this a single, TopCon, SubCon, DivCon, Parent, Subsidiary, Division, or Elimination?

Error Message(s) received (if applicable):

To check who may have the return open:

1. In the RS browser, go to **Returns**.
2. Put a check next to the locator in question, and click **Info**.
3. Click the **History** tab.
4. Click the hyperlink under the **App Server** column. This will display any users who have the locator open.

DISABLING AND CLEARING AUTOFILL INFORMATION IN YOUR BROWSER

Your browser settings may be auto-filling data in the Organizer. If you want to stop the autofill of data, follow the instructions for turning off autofill and clearing data for the browser programs you are using.

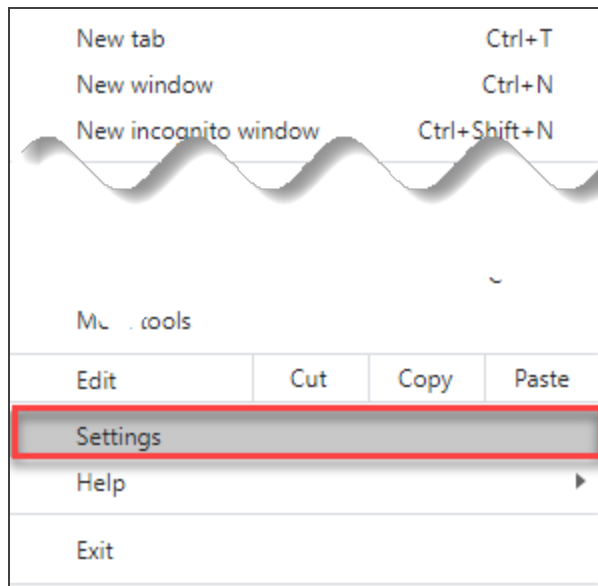
Google Chrome

TURNING OFF AUTOFILL

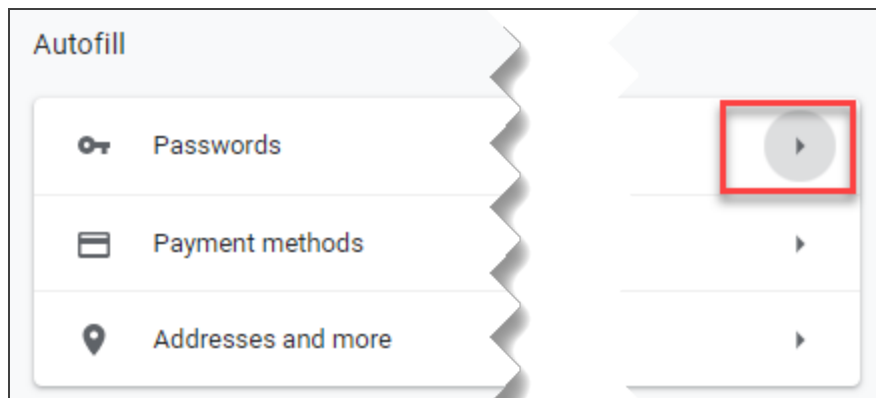
1. Select the menu icon.



2. Select **Settings**.



3. In the **Autofill** section, expand the area for which you wish to disable and toggle the setting to *OFF*.

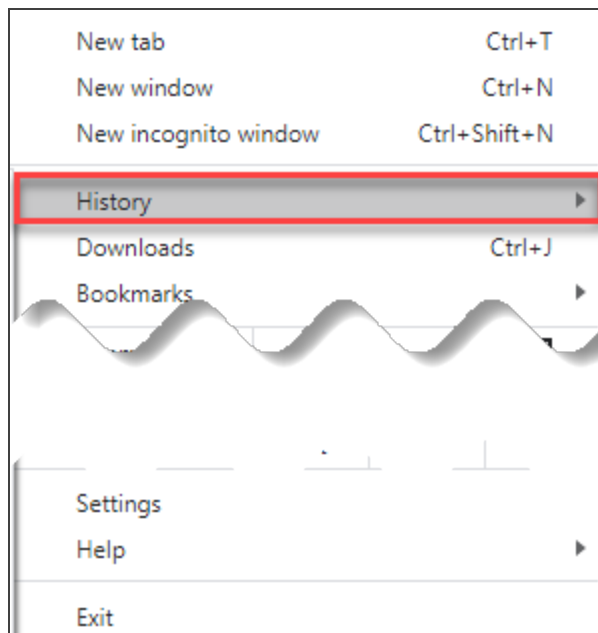


CLEARING AUTOFILL DATA

1. Select the menu icon.



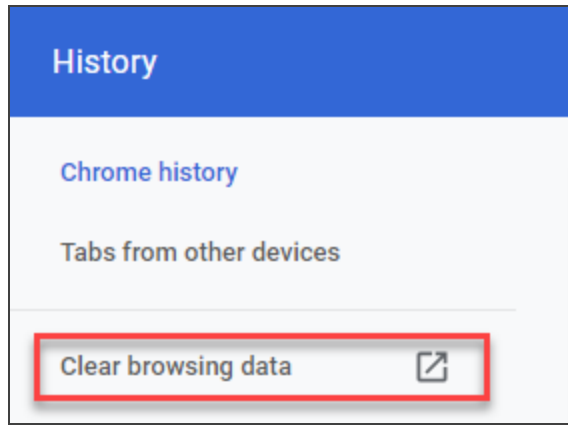
2. Select **History**.



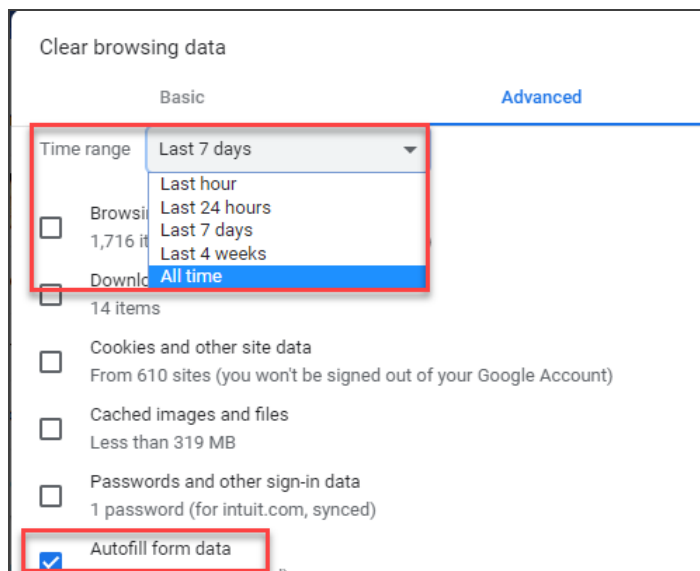
3. When the menu appears, select **History**.



4. Select **Clear browsing data**.

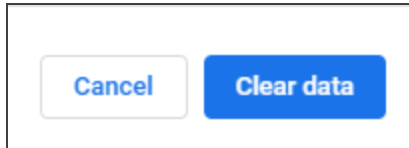


5. Select *the beginning of time* option to clear all saved data (may be *All time*, depending on the version of Google Chrome you are using).



6. Select **Autofill form data**.

7. Select **Clear data**.



Internet Explorer

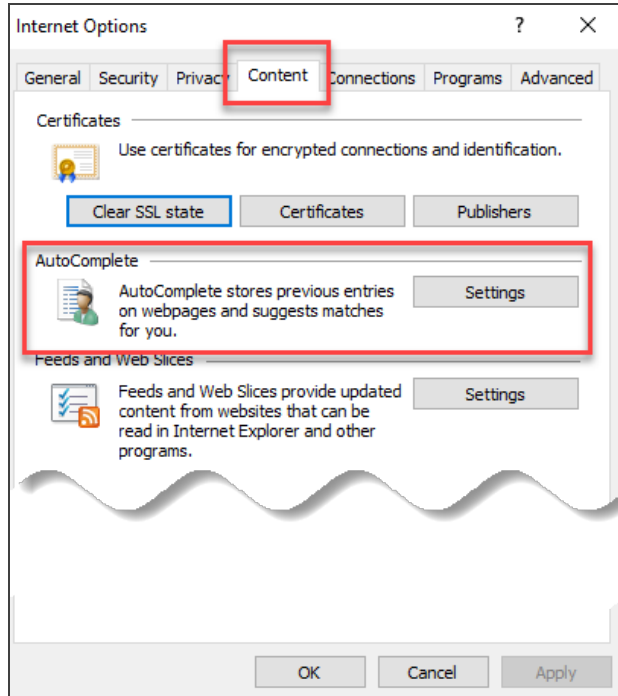
TURNING OFF AUTOFILL

1. Select the tools icon.



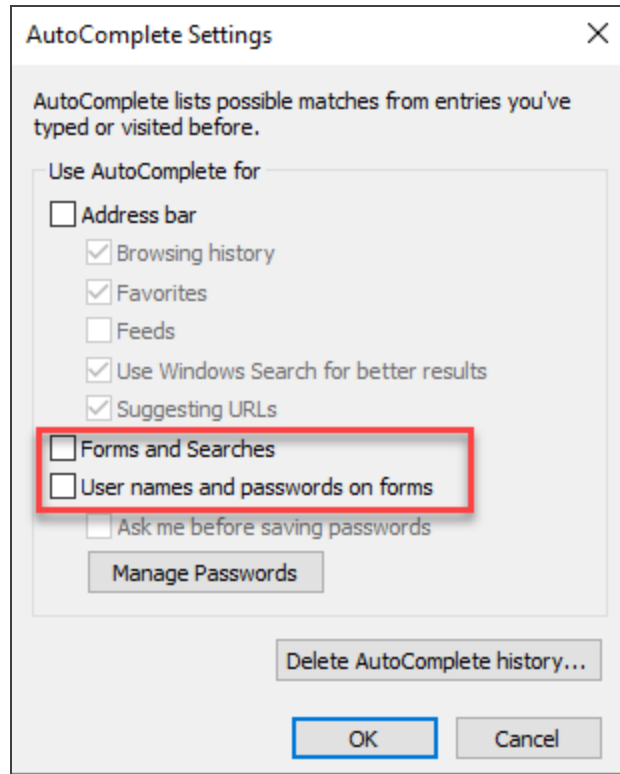
2. Select **Internet options**.
3. Select the **Content** tab.

4. In the **AutoComplete** section, select **Settings**.



Disabling and Clearing AutoFill Information in your Browser

5. Uncheck **Forms and Searches** and **User Names and passwords on forms**.



6. Select **OK** in the **AutoComplete Settings** window.
7. Select **OK** in the **Internet Options** window.

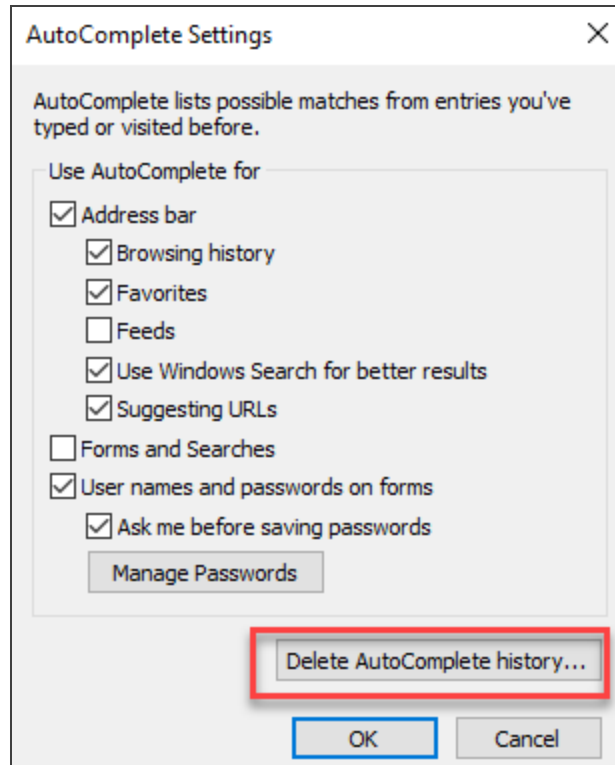
CLEARING AUTOFILL DATA

1. Select the tools icon.



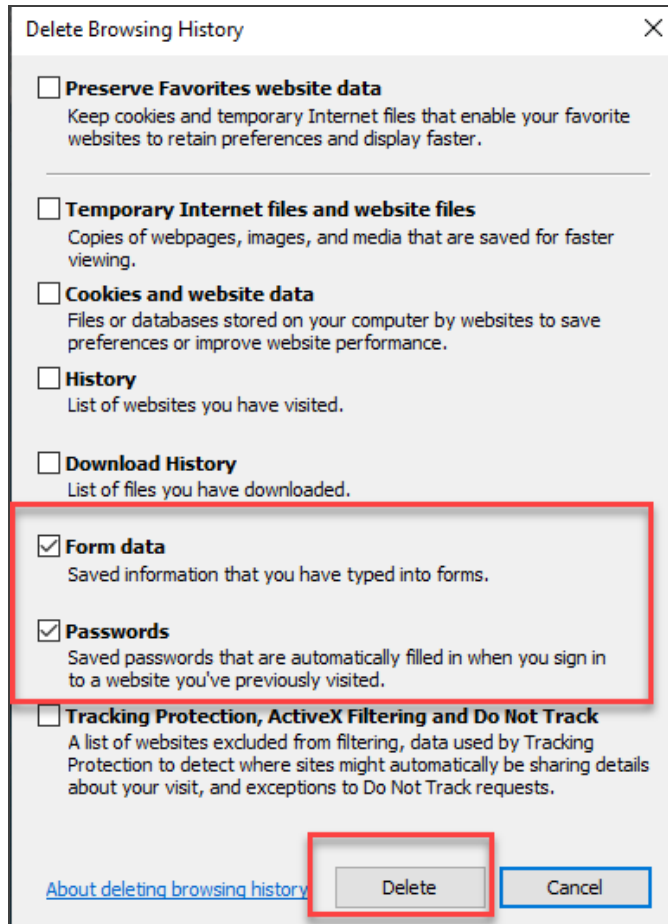
2. Select **Internet options**.
3. Select the **Content** tab.
4. In the **AutoComplete** section, select **Settings**.

- At the bottom of the **AutoComplete Settings** window, select **Delete AutoComplete History**.



- Select **Form Data and Passwords**.

7. Select **Delete**.



8. Select **OK** in the **AutoComplete Settings** window.

9. Select **OK** in the **Internet options** window.

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