ProSystem *fx*® Suite (SaaS)

ProSystem *fx* Tax (SaaS) Release Bulletin

This bulletin provides important information about the 2009-5.0 release of the ProSystem *fx* Suite (SaaS) Tax. Please review this bulletin carefully prior to installation. If you have any questions, please call Customer Support at **1-877-977-9PFX (9739)** or contact support on line at http://support.cch.com/suite.

The following website provides important information about this release: http://support.cch.com/Suite/ReleaseNotes/

By accessing this site you can view such helpful information as:

♦ Release Bulletins

♦ ProSystem *fx* Suite Support Calendar

Please visit the Suite-SaaS Application Status webpage to view in real time the current status of any of our SaaS application. The Application Status webpage is updated every 15 minutes. Customers may visit at any time, including when support is closed.

NEW IN THIS RELEASE

ProSystem *fx* Tax

2009 Tax Updates

Corporation
The Ohio extension Forms FT 1120 E/ER/EX are released. The final 2011 forms for Ohio Corporation are in the process of being updated in the 2009 tax year program and will be available on a future release.

Corporation / S Corporation
New Jersey Corporation Business Tax Return Fiscal Year Update - New Jersey Forms CBT-100 and CBT-100S and associated schedules have been released with an Approval Pending status for the fiscal year ending July 31, 2010, through June 30, 2011. In addition to updated tax forms, New Jersey has added 2 new scannable forms that require additional testing and approval time. Forms released for 2009-5.0 will print with the Approval Pending "patch" and should NOT be filed under any circumstances. A new release will be scheduled when approval is granted by the State of New Jersey Department of Revenue.

Organizer

- 1040 Individual Organizer is now available.

- 1041 Fiduciary Organizer is available with this release; however at this time, there are unresolved issues, and we suggest you not use it until further notice. We apologize for any inconvenience this may cause you and your firm.

- Organizer Custom Print Sets – Users with the appropriate permissions can customize Organizer output from within the Organizer print sets. To access Organizer print sets:
  - Dashboard – Configuration Tab – Tax – Organizer print sets OR
  - Dashboard – Application Tab – Batch Manager – Print Sets from the Customize group on the ribbon

- Organizer Letters – Users with the appropriate permissions can customize letters for Organizer. To customize your Organizer letters:
  - From the Dashboard, select Applications Tab – Batch Manager – Letters from the Customize group on the ribbon.

- Printing a single Organizer – To print an Organizer for a specific return:
  - Open the return from Return Manager and from the application menu, select Print – Print 2010 Organizer.

- Printing multiple Organizers – To print a batch of Organizers:
  a. From the Dashboard, select Applications Tab – Batch Manager
  b. Select New Job from the ribbon
  c. Select Print – Organizers

Other items available on the release:

- We have changed the Return Configuration Set Signature Block & Electronic filing options pages. Signature Block Line 3 and ERO contact City/State fields have been split into separate City, State & Country fields. Users will need to review their Return Configuration Sets to ensure we have parsed the information correctly into the new fields.

- We have removed the capability to print to XPS & Fax

- Signer configuration – We have added the email address, CAF & ERO Pin fields.

Features not available in this release – The following features will be available on later releases.

- Pro Forma

- Electronic Filing for consolidated returns

- The Texas Combined Group Automated Feature

- Deferred Compensation Signing Ceremony and masking of the credentials