

2015.05050
Release Notes

February 19, 2017



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Contact and Support Information

Product and account information can be accessed by visiting Customer Support online at Support.CCH.com. In addition to product and account information, the Customer Support site offers answers to our most frequently asked questions, forms release status, Knowledge Base articles, training videos, and operating systems compatibility. Access to these features is available 24/7.

The following Web site provides important information about the features and updates included in all CCH® ProSystem fx® Tax releases: [Release Notes](#)

Visit the [Application Status](#) Web page to view the current status of our CCH applications. The Application Status Web page is updated every 15 minutes.

Go to [Contact Us](#) to find information on topics such as Sales and Billing, as well as options to Open a Support Case or Chat with a Representative if you need assistance.

Information in Tax Year 2015 Release Notes

Tax Release Notes inform you of the enhancements and updates that have been made to Tax products and systems with the current release.

Updates provided in the Release Notes include the following:

- Contact and Support information
- Updates to the Tax technology (electronic filing updates, Pro Forma, Organizer, technology enhancements)
- Updates made to Tax products (form additions and updates, diagnostic updates, changes caused by regulatory updates)

Tax Updates

Pro Forma

Individual

Colorado. The 2015 sales tax refund is no longer included in the State Taxable Refund amount on Other Income > Refunds of State and Local Income Taxes (Interview Form M-3) for refund returns.

Fiduciary

- **Arkansas.** Nonresident returns no longer transfer 2015 tax due as a refund on Income - Other Income > State Tax Refund section (Interview Form M-1).
- **Colorado**
 - ◆ Resident and nonresident returns no longer transfer 2015 tax due as a refund on Income - Other Income > State Tax Refund section (Interview Form M-1).
 - ◆ The prior year taxes paid in the current year transfers to the Payments/Penalties - Payments > State Estimated Payments > Prior year taxes paid in current year field (Interview Form CO6, Box 97).

Product Updates

Individual (1040) Product Updates

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Federal

If a prior year conversion was made to a Roth IRA, there was not a prior year Roth IRA distribution and there was prior year basis in Roth IRA contributions, Pro Forma will carry the prior year basis in Roth IRA contributions to the 2016 Form 1099-R.

Estate and Gift (706/709) Product Updates

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New Jersey

New Jersey Form IT-Estate has been updated for revisions as posted by the State of New Jersey.