

2016.02000
Release Notes

January 8, 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 2016 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/Roll Forward, Organizer, technology enhancements)
- Updates made to Tax products (form additions and updates, diagnostic updates, changes caused by regulatory updates)

Tax Updates

Protecting Americans from Tax Hikes Act (PATH)

Due to the Protecting Americans from Tax Hikes (PATH) Act, due dates for the following major return types have changed:

- **1041** - Extended due date moved from 9/15 to 9/30
- **1065** - Return due date moved from 4/15 to 3/15
- **1120** - Return due date moved from 3/15 to 4/15; Extended due date moved from 9/15 to 10/15 (special rules apply for June 30 Fiscal Year returns)
- **990** - Extended due date moved from 8/15 and 11/15 to 11/15
- **Form 114** - Return due date moved from 6/30 to 4/15; automatic extension granted to 10/15

- **1040** - No change
- **1120S** - No change
- **5500** - No change
- **706/709** - No change

As with prior due dates, all of the above continue to move based on holiday or weekend conflicts.

Additionally, the PATH Act requires that refunds on Individual returns claiming Earned Income Tax Credit or the Additional Child Tax Credit be held until at least February 15, 2017, projecting availability to taxpayers the week of February 27, 2017.

Individual, Corporation, Fiduciary, Estate & Gift, and Exempt Organization

New for this release we will display the balance due or refund amounts for the federal and home state return on the toolbar. The toolbar will display this in the upper right hand corner while in any view (government form, interview form, worksheet view). This amount will update with each calculation, and will eliminate the need to go to the government form to view the new tax or refund.

Estate and Gift

Form 8971 transmittal letter and filing instructions are available.

Electronic Filing

The following federal and state products are approved and available on this release:

- Corporation
- S Corporation
- Fiduciary
- Exempt Organization

Corporation	S Corporation	Fiduciary	Exempt Organization
Federal	Federal	Federal	Federal

Corporation	S Corporation	Fiduciary	Exempt Organization
Form 114 (FBAR)	Form 114 (FBAR)	Form 114 (FBAR)	Form 114 (FBAR)
Arkansas	Colorado	Maine	
Colorado	Maryland	New Jersey	
Maryland	New Jersey	New Jersey Extensions	
New Jersey	Oklahoma	Pennsylvania	
Oklahoma	Oregon	Pennsylvania Extensions	
Oregon			

Individual

The IRS has announced that electronic filing for Individual returns opens on Monday, January 23, 2017.

Electronic filing of CCH ProSystem *fx* returns will be available for federal and certain states on Release 2016.02010, scheduled for Sunday, January 15, 2017.

Electronic Filing Status System

We have re-enabled the following functionality:

- **Return History Print** - Ability to print a single return history. The ability to print batch return histories will be available in a future release.
- **"Multi" Hover** - You can see the return status on Multi-State or Multi-FBAR units simply by hovering over the word "Multi" in the grid.