

**2016.02030**  
**Release Notes**

January 29, 2017



Contact and Support Information .....	2
Information in Tax Year 2016 Release Notes .....	2
<b>Highlights for Release 2016.02030</b>	<b>3</b>
Office Manager .....	3
Extension Worksheet .....	3
Tax Updates .....	3
Electronic Filing Updates .....	3
<b>Product Updates</b>	<b>7</b>
Individual (1040) Product Updates .....	7
Partnership (1065) Product Updates .....	8
Corporation (1120) Product Updates .....	9
S Corporation (1120S) Product Updates .....	10
Estate and Gift (706/709) Product Updates .....	11
Exempt Organization (990) Product Updates .....	12

## Contact and Support Information

Product and account information can be accessed by visiting Customer Support online at [Support.CCH.com](http://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)

## Highlights for Release 2016.02030

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### Office Manager

In Office Manager > Setup > Configure Staff > User we removed the Show Passwords buttons to increase security. This change will not interfere with the ability to reset users' passwords.

### Extension Worksheet

#### Partnership, Corporation, S Corporation, and Exempt Organization

We have added the extension letter/filing instruction options to the Extension worksheet. This is in addition to the current location in Options and will allow users to quickly select and verify these options without navigating back to the Options worksheet.

### Tax Updates

#### Individual, Partnership, Corporation, S Corporation, and Fiduciary

Minnesota updates are available related to new legislation passed to bring Minnesota into conformity with several federal tax provisions.

#### Individual - Tax Projector

Tax Projector is available in this release.

### Electronic Filing Updates

#### Reminders Regarding New Electronic Filing Requirements for Tax Year 2016

#### Individual

Driver's license/state identification information will now be required for Ohio. ID entries or an affirmative selection of "No ID" will be required to electronically file. Additionally, a diagnostic will issue for Mississippi that the "No Identification" option for driver's license/state id should only be used if no identification exists. We will continue to update our logic as taxing authorities issue guidance for this area.

#### Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization

**Officer ID** - State requirements for electronic filing of most state returns now stipulate the inclusion of an ID for the return signing officer. This ID is the social security number for the signing officer. States also allow for the federal employer identification number as an ID for the signing officer, if applicable.

**Number of W-2s** - State requirements for electronically filing returns require the number of W-2s associated with any deduction for salaries and wages to be included for electronic filing purposes. All Fiduciary, Federal, California, Florida, Michigan, and Texas returns do not require this information and can be electronically filed without the number of W-2s present.

 **Notes:**

- If these requirements are not met then your return will not qualify for export.
- The following states do not require the signing officer ID or the number of W-2s:
  - ◆ California
  - ◆ Florida
  - ◆ Michigan
  - ◆ Texas

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

### Individual

California Extension	Minnesota Property Tax	Tennessee FAE 183
California LLC	New Hampshire	Tennessee LLC
Georgia	New Mexico	Tennessee LLC Extension
Indiana	North Carolina	Vermont Extension
Massachusetts	North Carolina Extension	West Virginia
Massachusetts Extension	Philadelphia NPT/BIRT	
Minnesota	Philadelphia School District	

### Partnership

Idaho	New Hampshire DP-10	Philadelphia
Michigan	New York 204-LL	
Minnesota	Pennsylvania Extension	

### Corporation

Connecticut Extension	Massachusetts Extension	Minnesota Consolidated
Idaho	Michigan	Montana Consolidated
Idaho Combined	Michigan Consolidated	North Dakota Consolidated
Massachusetts	Minnesota	Philadelphia

### S Corporation

Idaho	Minnesota	Pennsylvania Extension
Massachusetts	New York City	Philadelphia
Massachusetts Extension	New York City Extensions	
Michigan	New York City Estimates	

### Fiduciary

Alabama	Idaho	Mississippi
Arkansas	Massachusetts	New York
California Extension	Massachusetts 2G	New York Extension
Delaware	Massachusetts Extension	

## Paper Batch Extension Program - Individual, Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization

The Batch Extension program is now available for processing multiple extensions. Extensions are processed using Production Processing > Extensions, Estimates & Electronic Filing > Print First Extensions, and other menu selections.

### Batch Electronic Filing of Extensions

Batch electronic filing of extensions is available on this release for the taxing authorities listed below. To process your e-file extensions, go to Production Processing > Extensions, Estimates & Electronic Filing > e-file Extensions.

#### Individual

Federal	District of Columbia	New Jersey
Arizona	Massachusetts	New York
Connecticut	North Carolina	New York City

#### Partnership

Federal	Maryland	New York City
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#### Corporation

Federal	New York
Maryland	Pennsylvania

#### S Corporation

Federal	New York
Maryland	Pennsylvania


#### Fiduciary

Arizona	New York
New Jersey	Pennsylvania

### FastForms is Now Active (Included with Release 2016.02020)

Last week we used our new FastForms feature to remove the watermarks from ten Nebraska pages.

We removed the watermarks from these forms when a user opened an Individual return. The forms are not replaced; they simply do not include the watermark. In order for this removal to take place, you must be on the latest release and you must be connected to the internet. If you do not meet these two conditions, the watermark will not be removed until the next release is installed OR until you connect to the internet.

 **Note:** This process occurs for a tax product when you open a return.

This new feature allows us to release forms on a more frequent basis as we get taxing authority approvals for paper forms. Currently you have to wait until the next formal release for these updates. This will greatly improve your workflow and allow you to process paper returns more quickly, eliminating days from the process.

You can review the list of watermarks removed during the week by going to [support.cch.com](http://support.cch.com) and navigating to the Forms Release Status page. We now list all forms released through Fast Forms with "Released - Fast Forms" and a release date.

# Product Updates

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## Individual (1040) Product Updates

Return to [Table of Contents](#).

### Ohio Electronic Filing

If paid preparer information is suppressed on Forms IT 1040 and SD 100, the "Authorize to contact" question will always be blank to allow electronically filing for self-prepared returns.

### Pennsylvania

Other Reduction Adjustments entries now carry to Schedule A, Line 8.

Form PA-40ES. The print order of vouchers is voucher 1 through voucher 4.

### Tennessee

The extended due date for INC 250, requested by filing Form INC 251, is October 16, 2017.

# Partnership (1065) Product Updates

Return to [Table of Contents](#).

## Federal

The personal portion of rental expenses reported on Schedule M-1, Line 4a is now automatically reduced by state/city income taxes shown separately on the supporting statement for Schedule M-1, Line 4a.



# Corporation (1120) Product Updates

Return to [Table of Contents](#).

## Federal

Officers Compensation overrides for Cost of Goods Sold will now override when entries are made in the COGS 8916-A Section.

## Oklahoma Electronic Filing

Form 512, Line 1. Diagnostic 42948 will no longer issue when taxable income is negative.

# S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

## Federal

Schedule K-1 will now show on Print Preview in the Accountant's copy when an individual shareholder's K-1 transmittal letter is suppressed.

## Hawaii

The Nonresident N-4 withholding rate changed from .11 to .0825.

## North Carolina

Form CD-401S, Schedule C. Line 1, Total Assets will no longer include the deduction for accumulated depreciation, depletion, and amortization, as this is deducted on Line 5.

## Ohio

Diagnostic 39774 will no longer issue when Form IT-4708 is not present in the return. This has been corrected on Release 2016.02030.

# Estate and Gift (706/709) Product Updates

Return to [Table of Contents](#).

## Federal

Form 706, Schedule M. Line 5a calculates correctly when the only property passing to the surviving spouse is nonresiduary property.

# Exempt Organization (990) Product Updates

Return to [Table of Contents](#).

## New Jersey

New Jersey letters and forms now reflect the mandated on-line filing requirement.

## New York

Form TR-573-CT will only generate when Form CT-13 is present in the return and electronic filing has not been requested.