

**2016.02040**  
**Release Notes**

February 5, 2017



Contact and Support Information .....	2
Information in Tax Year 2016 Release Notes .....	2
<b>Highlights for Release 2016.02040</b>	<b>3</b>
Electronic Filing Updates .....	3
<b>Product Updates</b>	<b>5</b>
Individual (1040) Product Updates .....	5
Partnership (1065) Product Updates .....	6
Corporation (1120) Product Updates .....	7
Fiduciary (1041) Product Updates .....	8
Estate and Gift (706/709) Product Updates .....	9

## 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)

## Electronic Filing Updates

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

#### Individual

**Ohio** - Ohio now requires Driver's license/state identification information for electronic filing. You must enter the ID entries or make an affirmative selection of "No ID" to electronically file.

**Mississippi** - We will issue a diagnostic for Mississippi informing you to only use the "No Identification" option for driver's license/state ID if in fact the taxpayer has no identification. 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 for most state returns now require the inclusion of an ID for the return signing officer. This ID is the Social Security number for the signing officer. States also allow the federal employer identification number (FEIN) as an ID for the signing officer, if applicable.

#### Notes:

- If you do not provide this information, your return will not qualify for export.
- The following states do not require the signing officer ID:
  - ◆ California
  - ◆ Florida
  - ◆ Michigan
  - ◆ Rhode Island
  - ◆ Texas

**W-2s** - We no longer require the number of W-2s for electronic filing, as we have determined that this is not necessary; you will no longer see a disqualifying diagnostic for federal or any state.

#### Approved Products Available on this Release

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

#### Individual

California LLC Extension	Louisiana Nonresident	Ohio Cities NonRITA
Iowa	Louisiana Extension	
Louisiana Resident	Mississippi	

#### Partnership

Alabama PPT	Massachusetts Composite Return Extension	Texas
District of Columbia Extension	Montana	Texas Extension
Indiana	New Mexico	Vermont
Massachusetts	New Mexico PW-1	Wisconsin PW-1
Massachusetts Extension	Rhode Island	

## Corporation

Alabama	Missouri Consolidated	Texas
Alabama Consolidated	New Mexico	Texas Consolidated
Alabama CPT	New Mexico Consolidated	Texas Extension
Colorado Consolidated	New York City	Virginia Consolidated
District of Columbia Extension	New York City Extension	Vermont
Detroit	New York City Estimates	Vermont Consolidated
Detroit Consolidated	Rhode Island	West Virginia
Massachusetts Consolidated	Rhode Island Consolidated	West Virginia Consolidated

## S Corporation

Alabama PPT	New Mexico	Texas Extension
District of Columbia Extension	New Mexico PW-1	Vermont
Detroit	Rhode Island	Wisconsin PW-1
Indiana	Texas	

## Fiduciary

Delaware Extension	Tennessee	Vermont
North Dakota	Tennessee Extension	Vermont Extension
New Hampshire	Texas	
New Mexico	Texas Extension	

## Exempt Organization

New York	New York Extension	New York Estimates
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## 2016 Electronic Filing Status System

**Print Reject Reports** - We have restored the ability to print Reject Reports. You may simply click on the Print button inside the Reject Report, now located to the left of the Export button.

## 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.

## Partnership

Connecticut	New Jersey
Kentucky	New York

## Corporation

Kentucky	Massachusetts	New Jersey
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## S Corporation

Connecticut	Massachusetts
Kentucky	New Jersey

# Product Updates

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## Individual (1040) Product Updates

Return to [Table of Contents](#).

### Federal

Letters and Filing Instructions. When the Direct Deposit/Debit Report has been suppressed in the client copy, the paragraph concerning direct deposit of a refund or direct debit of a balance due will be produced.

### Michigan Electronic Filing

Employee benefit returns will no longer reject when Employee Benefit is entered on Electronic Filing > Electronic Return Originator - Overrides > Non-paid preparer option (Interview Form EF-2, Box 83, Code "C").

### Minnesota Electronic Filing

Minnesota requires paid preparer information to be present when a return is created by a Professional Tax Product. Diagnostic 43471 issues when paid preparer information is not present.

### Ohio

Form SD 100ES, Page 2. Line 1 now includes self-employment income.

# Partnership (1065) Product Updates

Return to [Table of Contents](#).

## Federal

The annual report instructions will now print in ALL CAPS when that option is selected.

## New York

Form IT-204.1 will now populate with only partnership or LLC members in the return.

## Ohio

Form IT K-1

- The depreciation section will now be completed.
- New allocation codes 37230, 37231, and 37232 have been added to specifically allocate distributive income for IT 1140. Code 37200 will now only apply to IT K-1 (4708) taxable income.

# Corporation (1120) Product Updates

Return to [Table of Contents](#).

## Virginia Electronic Filing

In compliance with Virginia's Business Rule 500FED-005, Form 500, Line C(2) will only fill if there is an amount on Virginia's Schedule 500FED, Line 3. An informational only statement for the Virginia Net Operating Loss Carryforward adjustment will be added on a later release.

# Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

## Federal

Form 2210. Net Investment tax will not be included on Form 2210, Page 1, Line 2 for foreign trusts.

Grantor Letter. The grantor letter will report DPAD information from passthrough entities.

## Illinois

Forms IL-1041 and IL-1041X. Page 3 will now pull the preparer PTIN from Office Manager when entered.

## Kansas

Form K-41ES will now print with the return when applicable.

## Kansas Electronic Filing

Form K-41 letters and filing instructions will now show no payment is required when the balance due is below the \$5 minimum.

## Oklahoma

The due date will now display as 4/18/2017 instead of 4/17/2017 on Oklahoma letters and filing instructions.



# Estate and Gift (706/709) Product Updates

Return to [Table of Contents](#).

## Federal

Diagnostic 20103 no longer issues when DSUE from a predeceased spouse causes the applicable credit amount to exceed \$2,125,800.