

April 2, 2017



Contact and Support Information .....	2
Information in Tax Year 2016 Release Notes .....	2
<b>Product Updates</b> .....	<b>3</b>
Individual (1040) Product Updates .....	3
Partnership (1065) Product Updates .....	4
Corporation (1120) Product Updates .....	5
S Corporation (1120S) Product Updates .....	6
Fiduciary (1041) Product Updates .....	7

## 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 website 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)

# Product Updates

---

## Individual (1040) Product Updates

Return to [Table of Contents](#).

### Federal

Form 8606. When there is a Form 8606 and IRA distributions that are entirely qualified charitable distributions (QCD), Form 1040, Line 15a will include the QCD amounts.

### Arizona

Arizona TEC. Line 20, Tax Due, no longer includes the amount of withholding.

### Connecticut

Form OP-424. The "Business Name" line allows numbers.

Tax Equalization. Lines 22 and 26 calculate the tax liability based on withholding and payments from the previous year.

### Maine

Exclude pension exclusion and standard deduction when dependent of another is claimed.

### New Hampshire

The New Hampshire late payment interest rate has been updated to 6%.

### Pennsylvania

Interest on U.S. savings bonds and treasury obligations carries to Schedule A, Line 7 when the "FS Code" is blank or "F."

### Rhode Island

RI 1040, Schedule M.

- Line 1u calculates the social security benefits based on the taxable social security income.
- Line 1u will take into account Tier 1 railroad benefits. If there are Tier 1 benefits present, they will be subtracted from the taxable social security income before calculating.

# Partnership (1065) Product Updates

Return to [Table of Contents](#).

## Massachusetts Electronic Filing

When only using the Credit Manager Schedule (CMS), Pages 3 and/or 4, the Company name, FEIN, and Total Credit Taken from Page 1 will be included in the electronic file.

## Michigan - Michigan Cities

The custom filing instructions for Form 5458 reflect the correct amount for prior year overpayment in the credits and payments section.

## Rhode Island

Form RI-1065 reflects the due date as the 15th day of the 4th month, for Single Member LLC filers.

## Tennessee

The extension financial record will no longer be included in the electronic file when the Federal > General > Direct Deposit/Electronic Funds Withdrawal worksheet (Interview Form BNK-1), coded for Tennessee, is missing the direct debit/deposit check box, and the confirm box has been selected.

# Corporation (1120) Product Updates

Return to [Table of Contents](#).

## California Electronic Filing

Diagnostic 52617 has been updated to indicate that payments and banking information are mandatory for electronically filed extensions.

## Louisiana

Schedule D, Line 1D. The apportionment percentage defaults to 100% when no sales apportionment amounts are entered.

## Rhode Island

Disqualifying Diagnostic 44106 will issue if an invalid entry is present for the state of incorporation.

The year end date will print on Form RI-1120ES for calendar year returns.

# S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

## Arizona

The calendar year boxes on Form 140ES will be checked when the composite return is a calendar year return.

Form 140ES Nonresident Composite. Return payment check boxes will automatically be checked if a composite return is being filed.

## Louisiana

Schedule D, Line 1D. The apportionment percentage defaults to 100% when no sales apportionment amounts are entered.

## Oklahoma Electronic Filing

Form 512-S, Page 8. Schedule B and Schedule C percentages have been updated in the electronic file to show as a decimal instead of percentage (Ex. 50% will show as .50).

# Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

## Ohio

Form IT 1041P will print with the government copy of an electronically filed return.