

2016.04010
Release Notes

July 23, 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 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)

Tax Updates

Partnership

A new option is available to provide a blank copy of Forms 1065/1065-B when amending a return in order to file Form 8082, Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR). You will also be able to specify which partners' Schedule K-1s need to be included with the return. This option is available and can be activated on the following forms:

- Form O-8, Box 41
- Form IRS-K1P, Box 811
- Form IRS-K1F, Box 561


Estate and Gift

Final Connecticut forms are available for dates of death in 2017.

Electronic Filing Updates

Electronic Filing Status System

After performing a Filter/Search you will notice a change in the number of returns visible in the result set shown. We have greatly reduced the space between each row to maximize the number you can view before scrolling.

 **Note:** Each page's display limit remains at forty rows, but you are able to see more rows before the need to scroll.

Product Updates

Individual (1040) Product Updates

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Pennsylvania

Form PA-40. Line 1a includes the correct amount from Schedule W2S, Part B when Form 8606 has taxable state amounts present in Column G.

Statement SBE. When it is present it will always be included with the printed copy of the Pennsylvania return.

Taxpayer or jointly filed PA-40ES vouchers display the correct primary SSN when the taxpayer is deceased on a jointly filed PA-40 return.

Tennessee

The Interest rate charged on INC 250 and FAE 170 balances is 8% beginning July 1, 2017.

Partnership (1065) Product Updates

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Connecticut

Form 1065, Schedule K-1, Part II. Line 13 will no longer print a blank statement when the override is used.

Massachusetts

Due dates have changed for 1065 returns with an original due date on or after 01/01/2018 to be 3 months and 15 days after the end of the tax year.

Corporation (1120) Product Updates

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Federal

State prior year AMT tax carryover information can now be entered in worksheet view under Credits > 8827 > Prior Year Minimum Tax Carryover.

Alaska

When Federal Form 1120-C is filed, the return will calculate using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Arizona

When Federal Form 1120-C is filed, the return will calculate using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Indiana

When Federal Form 1120-C is filed, the return will calculate using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Massachusetts

Due dates have changed for 1120 returns with an original due date on or after 01/01/2018 to be 4 months and 15 days after the end of the tax year.

Mississippi

When Federal Form 1120-C is filed, the return will calculate using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Montana

When Federal Form 1120-C is filed, the return will calculate using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

S Corporation (1120S) Product Updates

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Louisiana

Initial returns have a minimum of \$110 for the franchise tax on Form CIFT-620, instead of \$10.

Massachusetts

Form 355-ES, Estimates. The Tax type has been updated in 355U Unitary returns to use "014."

Fiduciary (1041) Product Updates

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Federal

Grantor Letter. The Federal Grantor Letter will present qualified production information as the gross numbers entered.

Oklahoma

Form ESBT. The tax rate has been updated to 5.00%.

Estate and Gift (706/709) Product Updates

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Federal

Rev. Proc. 2017-34 portability election option is available on the Estate Tax > Elections and Options > Options > Print Rev. Proc. 2017-34 message at the top of Page 1 (Interview Form EST-5, Box 38).

Connecticut

The following final forms are available for dates of death in 2017:

- Form CT-706 NT
- Form CT-706/709
- Form CT-706/709 EXT

Massachusetts

To override the answer to Form M-706, Page 2, Question 5 that carries from federal Form 706, an option is available on Massachusetts > Estate Tax > Basic Data > Decedent made transfer under sections 2035, 2036, 2037, or 2038 - override (Interview Form MA1, Box 48).

Exempt Organization (990) Product Updates

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Massachusetts

Due dates have changed for corporate M-990T returns with an original due date on or after 01/01/2018 to be 4 months and 15 days after the end of the tax year.