2017.01000

Release Notes

December 3, 2017

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 2017 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 2017.01000

CCH® ProSystem *fx*® Tax

QuickBooks® Import for 1040 Returns

New for tax year 2017, you will be able to import data from Quickbooks®. We will provide this import through our G/L Direct feature. G/L Direct now has a standard import for Quickbooks® for Individual (1040) returns.

- You can import QuickBooks® data into Schedule C, E, and F.
- The source of the import is an Excel® file created by QuickBooks® (either online or desktop version).
- The G/L Direct Help file has instructions on how to create an export file in QuickBooks® for importing into G/L Direct.

Federal/States Returns Processed Detail Report

The detailed Returns Processed report, available in Office Manager (Print Reports > Fed/state returns processed), includes the detail of returns processed at least once. In addition, the report:

- Begins tracking 2017 returns calculated for the first time after this release.
- Is produced in Excel® automatically.
- Has options for filtering by Tax Year (only 2017 is available now), Tax product, Office group, Date range or Client ID.
- Allows you to add additional sorting and filtering in Excel®.

CCH® Global *fx* Tax

Close/Logout Security Enhancement

A new Logout menu link option and updates to the Close link function in Global *fx* have been added to strengthen customer data security. This is to avoid the possibility of others using your SSO session to make updates prior to the automatic system log out at 30 minutes of inactivity.

Important points to remember are:

- If you only have one SSO application open selecting Close will close your application window and log you out of your SSO session.
- If you have multiple SSO applications open selecting Close will only close your application window.
- If you have one or multiple SSO applications open selecting Logout will close your primary application window, log you out of your SSO session, and provide a prompt for logging back in.

CCH® ProSystem *fx*® and CCH® Global *fx* Tax

Extender Legislation

With tax season approaching and Congress still considering legislation that impacts 2017 tax returns, the IRS has begun releasing forms with flexibility to accommodate retroactive changes to 2017 tax law. The current IRS approach is to leave the forms in 2016 format, replacing the line descriptions with lapsed tax provisions of "Reserved."

To date, the following forms contain reserved fields:

Form	Title	System
1040	U. S. Individual Income Tax Return	1040
1040, SCH A	Schedule A Charitable Contributions Worksheet	1040
1040A	U.S. Individual Income Tax Return	1040
1041, SCH D	Schedule D Tax Worksheet	1041, 990
4136	Credit for Federal Tax Paid on Fuels	1040, 1065, 1120, 1120S, 1041
5695	Residential Energy Credits	1040
6478	Biofuel Producer Credit	1040, 1065, 1120, 1120S, 1041
8689	Allocation of Individual Income Tax to the U.S. Virgin Islands	1040
8835	Renewable Electricity, Refined Coal, and Indian Coal Production Credit	1040, 1065, 1120, 1120S
8844	Empowerment Zone Employment Credit	1040, 1065, 1120, 1120S, 1041
8845	Indian Employment Credit	1040, 1065 1120, 1120S
8864	Biodiesel and Renewable Diesel Fuels Credit	1040, 1065, 1120, 1120S
8900	Qualified Railroad Track Maintenance Credit	1040, 1065, 1120, 1120S
8904	Credit for Oil and Gas Production from Marginal Wells	1040, 1065, 1120, 1120S, 1041
8908	Energy Efficient Home Credit	1040, 1065, 1120, 1120S
8911	Alternative Fuel Vehicle Refueling Property Credit	1040, 1065, 1120, 1120S

Office Manager Updates

New Options

- A new drop-down list for “Electronic filing stopped notification to preparer option” has been added to Electronic Filing Notifications for all return systems.
- An option has been added to both the 1040 Options and the 1041 Options providing the ability to select the format of the income from passthrough statements at the office group level instead of on a per return basis. This option will be available for both ProSystem *fx* and Global *fx*.

Feature Changes

- The “Do not prepare separate letters for certain federal forms” for Letters and Filing Instructions has been changed to “Prepare separate letters for certain federal forms.” The change applies to both ProSystem *fx* and Global *fx*, and to Individual, Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization systems.
- The “Print ERO signature on Form 8879” on the Electronic Filing Options, ERO tab, has been replaced with a new drop-down list, “ERO Signature options for Form 8879.” The change applies to both ProSystem *fx* and Global *fx*, and to Individual, Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization systems. The option applies to tax years prior to 2017.
- The “Do not automatically carry extension payment amount to the return” on Miscellaneous Options as been changed to “Automatically carry extension amount to the return.” The change applies to both ProSystem *fx* and Global *fx*, and to Individual, Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization systems. The option applies to the 2016 tax year and higher.

Pop up Messaging

Once you log in to the Tax program, our new Message Center displays important system and software information, when available, from Wolters Kluwer.

Diagnostics Sign-Off

You can now "sign-off" the Caution and Informational diagnostics once you have reviewed them. Once you sign off, we will display the user ID and date and time of sign-off.

- If there are multiple occurrences of the same diagnostic, you can sign off on them all or just the current one.
- If needed, you can remove the sign-off on a diagnostic and it will return to the Open diagnostics tab.
- The diagnostics list is now collapsible by category, then further by unit.
- The diagnostics are displayed in tabs – Open, Signed-Off, and All.
- Diagnostics that link to fields will display the link icon to the left of the diagnostic item.
- There is also a new print option “Print only open diagnostics” that allows you to print only the open diagnostics with the return.

Global *fx* Utilities

The Global *fx* Utilities to Upload Returns, Download Returns, Upload Firm Information and Office Groups have been moved to CCH ProSystem *fx* Office Manager. To upload/download returns between Global *fx* and your local ProSystem *fx* database and to upload your firm configuration and office groups from your local ProSystem *fx* database, select the Global fx Utilities menu within your local ProSystem *fx* Office Manager application. Unlock Uploaded Returns has moved from the Tools menu to the Global fx Utilities menu.

Accessing Tax Instruction Information

Methods used to access Tax instruction information have been streamlined to ensure that you are finding the most up-to-date information available. As part of this initiative, the Tax Field/Form and Cross Reference guides will no longer be available. Instead, you can find all of the same information in the following locations:

- Technical User Guides are available on the product support pages under each product's Guides tab.
- Field/Form and Cross Reference help is available from within the software as in the past, but can also be found in Knowledge Base article CCH ProSystem fx Tax: Tax Help Files (SW42734).
- Additional information and videos about using Help tools from within the software is available in Knowledge Base article How do I access Cross-Reference Help and the other help options in CCH ProSystem fx Tax? (SW756).

Estimate Printing Enhancement

You can now select multiple quarters or all quarters when printing estimates.

K-1 Printing Enhancement

You can now print just one K-1 or select multiple K-1 print packages from within a return.

PDF Attachments Printing Enhancement

We added the ability to print attached PDFs whether the returns are selected for e-file or not.

Electronic Filing Status System

We added the following enhancements:

- **EFIN Manager**

  With our new EFIN Manager, users can easily view, modify and track their EFINs and Vendor Control Numbers in one central location.

  - EFIN Manager is available within the Electronic Filing Status System by selecting **Admin**, located to the right of your name, then **EFIN Manager**. This is available to you if you have release return rights.

    Note: You will need to select an Office before the menu option for EFIN Manager will display. Office cannot be set to "All" in order to access EFIN Manager.

  - For a new EFIN, add the **EFIN** and the IRS **Tracking Number** into EFIN Manager.

    Note: This replaces the need to upload your IRS Application Summary to us.

  - You may also mark an EFIN as active/inactive, assign account number(s) to an EFIN, hide an EFIN from view in EFIN Manager, or delete an EFIN from our database.

    Note: Once deleted, an EFIN cannot be restored. In this case, you will need to add as a new EFIN.

- **Banking Info Columns**
  - We added two additional default columns, Bank Info and State Bank Info, to the e-filing Status and Release Return(s) tabs. These columns may be relocated or removed from your view via “Select Columns.” Restore Default View within “Select Columns” will bring them back into your view.
  - We added Bank Account Num (Number) as a selectable column available via “Select Columns.” This column will provide the last four digits of the first Federal bank account number listed.
- **Return History**. We added the version number to the Return History page, allowing you to verify the version number when electronically filing multiple versions of the same return.

  You can view the return ID, including the version number, on the Return History page.

  Note: This applies to returns uploaded following the 2017.01000 release version only.
- **Logout**. You may now logout of all CCH ProSystem *fx* web or CCH Global *fx* applications simultaneously. “Close” remains to simply close the current browser window.
- **Preparer Notifications**. Signers can now elect to receive e-mail notifications for returns in a stopped status using a new option in Office Manager (Configure Applications > Tax Preparation > Electronic Filing Notifications > All systems).

  Common reasons why an electronic filing transmission is in stopped status are:
  - IRS and state schema validation errors
  - Missing account, state, or EFIN information
  - Invalid EFIN information
- **Messaging**
  - We added a new message for the electronic filing maintenance page to notify you when the IRS is down.
  - We added a new message during export to notify you when the maintenance page is up.

CCH® My1040Data

CCH My1040Data is now available for creating 2017 web-based organizers for your clients.

We added the following enhancements:

- The location of client-entered (taxpayer-entered) notes in My1040Data will move near the beginning of the PDF file to ensure they are not missed by the accountant.
- The previous “Unemployment Compensation” item on the left menu under “Income & Deductions” will change to “1099-G (State & Local Refund, Unemployment)” in order to be more descriptive. The entry screen will now include a description of the types of items that should be entered there.
- In order to improve client (taxpayer) confidentiality, My1040Data will force the client to change the system-generated password when first logging into My1040Data. The client’s newly chosen password will no longer be visible to the My1040Data Toolkit administrator.
  - Beginning with tax year 2017, the Toolkit will only display passwords created by the Toolkit or by the accountant.
  - In the case of client-created passwords, the Toolkit will display "Changed by Client" in the Password field, but not the client-created password.

Important: The 2017 version of My1040Data Toolkit will only open client (taxpayer) files related to tax year 2017. Please ensure you have retrieved all of your clients’ tax year 2016 files before installing the 2017 version.

CCH® ProSystem *fx*® Tax Notebook and CCH® ProSystem *fx*® Tax Notebook Toolkit

Tax Notebook Toolkit is now available for processing and for creating Tax Notebooks.

Tax Product Enhancements in Release 2017.01000

Click one of the links below to read about the tax application enhancements included with Release 2017.01000.

Worksheet View

Individual (1040) Product Enhancements - Worksheet View

Partnership (1065) Product Enhancements - Worksheet View

Corporation (1120) Product Enhancements - Worksheet View

S Corporation (1120S) Product Enhancements - Worksheet View

Fiduciary (1041) Product Enhancements - Worksheet View

Employee Benefit Plan (5500) Product Enhancements - Worksheet View

Exempt Organization (990) Product Enhancements - Worksheet View

Estate and Gift (706/709) Product Enhancements - Worksheet View

Interview View

Individual (1040) Product Enhancements - Interview View

Partnership (1065) Product Enhancements - Interview View

Corporation (1120) Product Enhancements - Interview View

S Corporation (1120S) Product Enhancements - Interview View

Fiduciary (1041) Product Enhancements - Interview View

Employee Benefit Plan (5500) Product Enhancements - Interview View

Exempt Organization (990) Product Enhancements - Interview View

Estate and Gift (706/709) Product Enhancements - Interview View

Tax Product Enhancements 2017.01000 - Worksheet View

Individual (1040) Product Enhancements - Worksheet View

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Federal

- We aligned the fields on the Consolidated 1099, 1099-INT, and 1099-DIV source documents input so all entries are available on each.
- We no longer disqualify e-filed extensions (FD or state) after the due date.

Consistency/Usability Changes

- We added descriptions rather than codes in Worksheet drop down fields, so the choice will be visible without clicking.
- We added all allowable fields to all summary grids. This means that, whenever possible, each Summary grid will now contain all the fields found on the Detail grid.
- We added a state e-file estimate grid.
- To improve worksheet navigation:
  - Form 1116 is listed in both Credits and Foreign (Mirrored entries).
  - Schedule and Form names are explicitly stated.
  - Rearranged Deduction, Tax and Foreign categories to follow the flow of Form 1040.

Direct Deposit/Debit Report

We appended the scheduled date for withdrawal to the text in the Debit/Deposit column, which will show when the withdrawal is scheduled for all return types, including estimate payments.

Pro Forma of Estimated Payments

We now pro forma (for informational purposes only) the prior year's calculated estimated tax payments in the following year's return. If there are estimate amounts entered and the Payments/Penalties > Payments > Federal Tax Payments > Include prior year estimate amounts on current year return field is selected, we issue a diagnostic indicating we used the keyed amount, not the memo amount.

Extensions

We added a Prepare All Extensions option to generate required extensions for all taxing authorities in a return.

- The input is on Extensions > Automatic Extension > Prepare all extensions

1040NR, U.S. Nonresident Alien Income Tax Return

- We added the ability to e-file Form 1040NR to tax year 2016.
- We added Form 1042-S for source document input.
  - This is a non-calculating library form required for e-file. Amounts entered here do not carry into the return.

1099MISC

We added a code for Nonemployee Compensation so the amount will carry to both Other Income and Schedule SE.

- Other Income > Miscellaneous Income > Other > Treat nonemployee compensation as other income

Form 5471

We added a new Schedule G, Line 3 statement.

Form 8621 Excess

We improved the look and content of this worksheet by changing it to a small font.

Form 8903

Prior year basis, at-risk and passive domestic production loss carryovers will now carry to Form 8903 and be used in the calculation of QPAI.

States

Agreements with State Taxing Authorities (Letters of Intent)

We must comply with the following requirements from States governing paper and e-file submissions:

- Restrictions on Pro Forma (transfer of data)
  - The following states will not allow us to pro forma driver's license numbers and State IDs: AL, CT, IA, ID, IN, ME, NC, ND, NE, NJ, NM, OK, WI.
  - The following states will not allow us to pro forma bank information (account numbers), driver's license numbers, or State IDs: AR, IL, SC, WV.
  - This state will not allow us to pro forma driver’s license number, State ID, bank information, State PINs or locality codes: VA.
  - The following states require the preparer to confirm pro formaed data: CO, KY, MD, MN.
  - The following states require two-step verification of various items: AR, OR.
- Most states now require us to include refund/ID theft statements and associated URLs in the return; this is handled in Help.
- We will disqualify the return from e-file if driver's license information is not in the return for: AL, CT, NM, NY and OH. Per these States, you will not be able to electronically file these returns until you enter the information.

Alabama

We added Schedule IRC – Irrigation/Reservoir System Credit.

- AL Credits > Irrigation/Reservoir System Credit

Arkansas

AR1000CE, Teacher’s Classroom Investment Expense.

- Credits > Teacher’s Classroom Investment Expense

California

We added the following:

- State 8878, extension signature document to extension print package.
- Schedule X – Amended Return Worksheet.

Colorado

- Electronic filing estimates
    - Electronic Filing > State > Electronically File Estimates
- DR 0350 – First Time Home Buyers Subtraction
    - CO > Income/Deductions > Deductions and Subtractions > First time home buyer savings account deduction

District of Columbia

We are no longer offering a refund card as an option due to new requirements.

Kansas

There is a new three-bracket rate structure.

Kentucky

We added Schedule KW-2, Kentucky Income Tax Withheld.

- Mandatory for paper filed returns only.

Massachusetts

We changed the default for MA bank interest that is applied to MA resident returns.

Michigan

Form 1040X is obsolete; replaced by Form 5530.

Michigan - DTW

We added Detroit Form 5338, Underpayment of Estimated Tax.

- Michigan > Cities > Underpayment of Estimate Tax Preparation

Minnesota

We added the following:

- Schedule M1529, Education Savings Account Contribution Credit or Subtraction
    - MN > Credits > Education Savings Account Contribution Credit or Subtraction
- Schedule M1SLC, Student Loan Credit
    - MN > Credits > Student Loan Credit
- Schedule M1RCR, Credit for Tax Paid to Wisconsin
    - MN > Credits > Credit for Taxes Paid
- Schedule M1HOME, First-Time Homebuyer Savings Account

- Schedule M1AR, Accelerated Recognition of Installment Sale Gains
- Credit for Taxes Paid worksheet for e-file

Missouri - St. Louis

We added Form E-8, Application for Extension of Time to File Business Earnings Tax Return.

Montana

- The Amended return is now included on Form 2.
  - Montana > Amended > Amended
- NOL information is now included on Form 2.
  - Montana > Income/Deductions > Preceding Years Information

Nevada

We added an Application for 30 Day Extension.

New Hampshire

- We added Business Profits Tax e-file.
- We removed the sole proprietor versions of the Business Profits Tax forms; LLC versions are available exclusively.

New York

We added the following:

- State 8878, extension signature document to extension print package
- Form IT-219, Credit for New York City Unincorporated Business Tax
  - New York > Credits > Credit for NYC UBT (Form IT-219)
- Form IT-223, Innovation Hot Spot Deduction
  - New York > Income / Deductions > Innovation Hot Spot Deduction (Form IT-223)
- Form IT-249, Claim for Long-Term Care Insurance Credit
  - New York > Credits > Long Term Care Insurance Credit (Form IT-249)
- Form IT-256, Claim For Special Additional Mortgage Recording Tax Credit
  - New York > Credits > Credit for NYC UBT (Form IT-256)
- Form IT-603, Claim For EZ Investment Tax Credit and EZ Employment Incentive Credit
  - New York > Credits > EZ ITC and EZ ITC (Form IT-603)
- Form IT-607, Claim for Excelsior Jobs Program Tax Credit
  - New York > Credits > Claim for Excelsior Jobs Program Tax Credit (Form IT-607)
- Form IT-398 Input for Assets (like 1120/1120S).
  - New York > Income / Deductions > Depreciation Schedule(s)
  - New York > Income / Deductions > Adjustment
- Forms W2, W2-G, 1099-G (EF only).
  - Income > Wages, Salaries and Tips (IRS-W2) > Wages and Salaries (IRS-W2)
  - Income > Other Income (1099G, 1099K,1099-MISC,W-2G) > Gambling Winnings (IRS-W2G)
  - Income > Other Income (1099G, 1099K,1099-MISC,W-2G) > Certain Government Payments (IRS 1099-G)

New York - New York City

We added city 8878 signature document to extension print package.

North Carolina

We added Schedule PN, Part-year Resident and Nonresident Schedule.

Oregon

We added the following:

- OR-WFHDC, Oregon Working Family Household and Dependent Care Credit Worksheet
  - Oregon > Credits > Working Family Household and Dependent Care
- Retention document for calculating prior year Working Family and Household Add Dependent Care Credit
  - Oregon > Credits > Working Family Household and Dependent Care

Pennsylvania

We separated Schedule G-L override logic.

- One override no longer requires all fields to be overridden.
  - Existing input has been updated to include only one column with TS code to indicate taxpayer or spouse.

Schedule A/B will not split into separate schedules if any overrides are entered.

- We now treat the Taxpayer/Joint column as jointly filed input if all other entries are coded joint and as Taxpayer input if any other entries are coded as Taxpayer or Spouse.
  - Income / Deductions > Schedule A and Income / Deductions > Schedule B
- We added an option to force separate schedules.
- Overrides have been expanded to all lines.

South Carolina

We added an Out of State Income/Loss statement.

- New adjustment options are added for this on SC > General > Options > SC adjustment worksheet options.

Tennessee

We added FAE172, Quarterly Franchise, Excise Tax Declaration e-file.

- Tennessee > Other > Estimate Preparation Options and Overrides

Vermont

We added the ability to batch e-file extensions.

Wisconsin

We added the following:

- Schedule GL, Gain or Loss on the Sale of Your Home.
    - WI > Credits > Gain or Loss on the Sale of Your Home
- Credit for Taxes Paid worksheet for e-file.

Partnership (1065) Product Enhancements - Worksheet View

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Federal

We added the following:

- All Detail fields to Worksheet View Summary Grids.
- Date of Withdrawal/Deposit to Direct Debit/Deposit Report.
- Input reversals for Office Manager default options.
- 1065 – Form 8082, Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR).
  - We added an option to provide compliant presentation for Amended Returns to provide a blank Form 1065 when Form 8082 is filed (available in 2016).
- Form 8975, Country-by-Country Report and Form 8975, Schedule A, Tax Jurisdiction and Constituent Entity Information.
- Descriptions rather than codes in Worksheet drop down fields, so the choice will be visible without clicking.
- Generic State Partner Information is now available in a summary grid format to allow importing/exporting.

States

Arizona

There are new forms:

- AZ 338-P Credit for Investment in Qualified Small Businesses.
- AZ 342-P Credit for Renewable Energy Industry.
- AZ 343-P Renewable Energy Production Tax Credit.
- AZ 345-P Credit For New Employment.

Arkansas

We added the following:

- Page 2 for Form AR 1000CR, Composite Return.
- Form AR1055-CR, Request for Extension of Time for Filing Composite Income Tax Returns.
- Form AR1055-PE, Request for Extension of time for Filing Partnership Tax Returns.

California

California Magnetic Media is retired. Effective January 1, 2018, FTB will discontinue the Paperless Schedules K-1 (565 or 568) program.

Connecticut

Form CT 1065/1120SI, Schedules B and D, Supplemental Parts 3 through 7 have been changed to accommodate presentation compliance.

District of Columbia

We added Combined Reporting Schedule 1A and 1B, Computation of Cost of Goods Sold to provide support for Combined returns.

Georgia

We added 2D Barcode.

Indiana

We added Schedule Composite-COR, Composite Indiana Adjusted Gross Income Tax Return for Corporate Entities.

Maryland

We added Form 548, Power of Attorney.

Michigan

We added Form MI-1041ES, Fiduciary Voucher for Estimated Income Tax and Worksheet for Composite Returns.

Minnesota

We added the following:

- Electronic filing for estimates.
- Vouchers for Amended Return Payment, Estimated Tax Payment, Tax Return Payment and Extension Payment.

Nevada

We added NV EXT, Application for 30-day Extension of Time to File and Pay Commerce Tax.

New York

We added state input to support Form IT-398 when Totals Depreciation is used.

Ohio

We added Form UPC, Ohio Universal Payment Coupon.

South Carolina

Electronically filed financial transactions are available for Direct Debit/Deposit.

Corporation (1120) Product Enhancements - Worksheet View

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Federal

We added input to produce all state extensions for all states prepared in a return.

- Extensions > Federal Extension > Produce all state first extensions

Late Filing Penalty

The minimum late filing penalties for federal returns filed more than 60 days late have been increased. The penalty is the greater of (a) $210 or (b) 10% of the tax due. This provision applies to tax years beginning in 2017.

Pro Forma of Estimated Payments

We now pro forma (for informational purposes only) the prior year's calculated estimated tax payments in the following year's return. If there are estimate amounts entered and the Payments/Penalties > Payments > Federal Tax Payments > Include prior year estimate amounts on current year return field is selected, we issue a diagnostic indicating we used the keyed amount, not the memo amount.

Prior Year Estimates as Current Year Tax Payments

The wording for the Office Manager option to include prior year estimates for federal/state returns as tax payments in next year's Pro Forma changed from "do NOT Include federal and state estimate amounts" to "Include federal and state estimate amounts." If the option is selected, federal and state payments will be shown as prior year information on the Federal Tax Payments worksheet and the State Quarterly Payments worksheet.

Suppress Page 1 Statements

We added a Suppress Printing of Statements to all Page 1 statements on General > Return Options > Processing Options.

Schedule D, Page 2 Part IV Alternative Tax for Corporations with Qualified Timber Gain

This is no longer applicable for 2017.

Form 1120-F

- We added a new question CC on Form 1120-F, Page 2.
  - The input is on Other Returns > 1120-F > General Worksheet Line 44.
    - If the question is answered "yes", statement information input on Other Returns > 1120-F > General worksheet > Line 47 using new Code 5 is required.
- Form 1120-F, Page 3, Section I, Line 2 Dividends now includes two lines, 2a and 2b.
  - Line 2a Dividends input is on Other Returns > 1120-F > Income NOT Effectively Connected with U.S. Trade or Business worksheet > Dividends.
  - Line 2b, Column b input is on Other Returns > 1120-F > Income NOT Effectively Connected with US Trade or Business worksheet > Line 20.
  - Line 2b, Column e input is on Payments/Penalties > Federal tax Payments worksheet with code "Q."

Form 1120-H

We added a drill down for Form 1120-H, Page 1, Line C.

Form 1120-L

The restatement of reserves from statutory annual statement to tax return is now automatically computed for Schedule F Lines 1-6.

We added the following features:

- A drill down with A/S source references
- A reconciliation from A/S to tax return
- Supporting statements included with the tax return
- An automatic carry from NAIC import
- The ability to change/override all system computations

Form 1120-PC

We added a check box to Form 1120-PC, Page 1, indicating Schedule B is being filed. Questions added to Page 7 on diversification requirements before filing Schedule B.

- The input is on Insurance > 1120-PC > General worksheet > Line 6.

Form 1120-REIT

We added four new lines to Form 1120-REIT, Page 2, Part III – Tax for Failure to Meet Certain Source-of-Income Requirements: Lines 2b, 2c, 5b, and 5c. Lines 2c and 5c are the same.

- The input is on Other Returns > 1120-REIT > Section 857(b)(5), (857(b)(7)(A), and 866(c)(7)(g)(5)> Lines 21, 22, and 23.

Form 4684 – Casualties and Theft

We added Page 4 for Election to Deduct Federally Declared Disaster Loss in Preceding Tax Year and Revocation of a Prior Year Election.

- The input is on Income / Deductions > Election to Deduct Disaster Loss.

Form 4810

This form is only produced when Form 1120-SF for Settlement Funds is present.

- The input is on other Returns > 1102-SF – Settlement Funds > Form 4810.

Form 7004 – Option to Carry Extension Payment to Return

The option defaults wording in Office Manager and Extension > Federal Extension worksheet has changed from “Do NOT carry extension amount to return” to “Automatically carry extension payment amount to return.”

Form 7004 – Option added to Produce All State Extensions

We added the option "Produce all state first extensions” to Extensions > Federal Extension.

Form 8827 – Credit for Prior Year Minimum Tax

Carryover Information will no longer pro forma to Credits > 8827 – Credit for Prior Year Minimum but Tax worksheet will still pro forma to Credits > Credit Carryover worksheet.

Form 8903

We added a drill down for Form 8903.

Form 8904

- Credit for Oil and Gas Production from Marginal Wells is available for the 2017 tax year.
  - Use Credits > 8904 - Credit for Oil and Gas Production from Marginal Wells to prepare the credit form.
  - Use Other Enacted Credits worksheet to claim the credit on Schedule K/K-1.
- Special allocation code 5742 is added for allocation of this credit among the shareholders in the return.

Form 8926 – Disqualified Corporate Interest Expense Disallowed Under 163(j)

We added extensive drill downs to Lines 1a, 1b, 1d, 1f, 2a, 2b, 3a, 3b, 3c, 3d, 4b, 7, and 8a.

Form 8975 and Schedule A (Form 8975)

Country-by-Country Report (Form 8975) and its Schedule A for tax jurisdiction and constituent entity information are available for both electronic filing and paper filing for 2016 (fiscal year only) and 2017 tax years.

- Use Other > 8975 - Country-by-Country Report worksheet to prepare Form 8975.
- Use Other > Schedule A (Form 8975) -Tax Jurisdiction and Constituent Entity Information worksheet to prepare Schedule A (Form 8975).

Schedule A (Form 8975) - Tax Jurisdiction information can be imported from an Excel® worksheet.

- Other > Schedule A (Form 8975) - Tax Jurisdiction Country-by-Country

Constituent Entities information can be imported from an Excel® worksheet to the return.

- Export > Constituent Entities of the MNE Group per Tax Jurisdiction

Any additional information of a Tax Jurisdiction can be imported from an Excel® worksheet to the return.

- Export > Tax Jurisdiction Additional Information

Schedule PH (Form 1120)

We added IRS Tests Used to Exclude Items of PHC Income to Schedule PH Lines 18-21.

- The input is on Taxes > Schedule PH > Testing for Exclusions to PHC Income worksheet.

Principal Business Activity Codes

The IRS has revised the list of Principal Business Activity Codes on 2017 filing instructions for Form 1120. Please review the list on Form 1120 instructions. There are some additions, some deletions, and some description changes.

If the return is pro formaed from the prior year, please check the principal business activity code on Basic Data > General Information > Business code for accuracy.

Category	2016 Code	2017 Code	Addition/ Deletion/ Change	Description	Note
Mining		211120	Add	Crude Petroleum Extraction	
Mining		211130	Add	Natural Gas Extraction	
General Merchandise Stores		452300	Add	General Merchandise Stores, Incl. Warehouse Clubs and Supercenters	
Rental and Leasing Services		532283	Add	Home Health Equipment Rental	
Rental and Leasing Services		532284	Add	Recreational Goods Rental	
Rental and Leasing Services		532289	Add	All Other Consumer Goods Rental	
General Merchandise Stores	452110	452200	Change Code	Department Stores	No change to description
Rental and Leasing Services	532220	532281	Change Code	Formal Wear & Costume Rental	No change to description
Rental and Leasing Services	532230	532282	Change Code	Video Tape and Disc Rental	No change to description
General Merchandise Stores	452900		Delete	Other General Merchandise Stores	
Rental and Leasing Services	532290		Delete	Other Consumer Goods Rental	
Mining	211110		Delete	Oil and Gas Extraction	

Extension Payment Amount

The wording in Office Manager of option “Do not automatically carry extension payment amount to the return” is now changed to “Automatically carry extension payment amount to the return.” Therefore, the default is now **not** to carry the extension payment amount to the return unless the Office Manager option is checked.

Section 165(i) of Election to Deduct Disaster Loss in the Tax Year Immediately Preceding Tax

Federal Elections > Deduct Disaster Loss in the Tax Year Immediately Preceding Tax Year of Disaster section is deleted.

Confirm Accuracy of Data Transferred from Prior Year

A new field is added on General > Basic Data > General > Confirm accuracy of data transferred from prior year. This is used for some states that require verification of certain identification information to electronically file. Mark this field to confirm the data accuracy and clear the disqualifying diagnostic.

Consolidated

We added the following:

- Computed Only Totals for Ending Eliminations to Consolidated Balance Sheet.
- Schedule M-3 statements for Other Income/Loss items (M-3, Part II, Lines 25 and 28) and for Other Expense/Deduction Items (M-3, Part III, Line 37).
- A consolidated diagnostic when Section 280(c) election is present to elect the reduced research credit on Form 6765 instead of reducing other deductions differs between the consolidated return and any separate companies the following diagnostic will be issued:

  CAUTION

  Section 280(c) election between separate company return(s) and consolidated return is different. All members of a consolidated return must adopt the same election. Otherwise the credit computation as well as carryover to future year may be incorrect.

States

We added electronic filing for the following:

- District of Columbia consolidated
- Nebraska consolidated
- North Carolina consolidated

District of Columbia

We combined Reporting Schedule 1A and 1B, Computation of Cost of Goods Sold to provide support for Combined returns.

Illinois

We added IL-1120 Schedule SA, Specific Accounting Method of Computing Net Income for Corporations.

Kentucky

We added Schedule L-C, Limited Liability Entity Tax.

Maryland

We added Form 548, Power of Attorney.

Minnesota

We added the following:

- Electronic filing for estimates.
- Vouchers for Amended Return Payment, Estimated Tax Payment, Tax Return Payment, and Extension Payment for 1120 and UBIT.

Nevada

We added NV EXT, Application for 30-day Extension of Time to File and Pay Commerce Tax.

New York

We added separate signature forms to NY TR-579-CT for electronic filing.

New York - New York City

We added separate signature forms to NYC 579-COR for electronic filing.

South Carolina

Electronically filed financial transactions are available for Direct Debit/Deposit.

S Corporation (1120S) Product Enhancements - Worksheet View

Return to Table of Contents.

Federal

- We added input to produce all state extensions for all states prepared in a return.
  - Extensions > Federal Extension > Produce all state first extensions

Pro Forma of Estimated Payments

We now pro forma (for informational purposes only) the prior year's calculated estimated tax payments in the following year's return. If there are estimate amounts entered and the Payments/Penalties > Payments > Federal Tax Payments > Include prior year estimate amounts on current year return field is selected, we issue a diagnostic indicating we used the keyed amount, not the memo amount.

Prior Year Estimates as Current Year Tax Payments

The Office Manager option to include prior year estimates for federal/state returns as tax payments in next year's Pro Forma changed from "do NOT Include federal and state estimate amounts" to "Include federal and state estimate amounts."

Form 4684, Page 4

Page 4 of Form 4684 is added for election to deduct federally declared disaster loss in preceding tax year and revocation of prior election.

- Use Income/Deductions > 4684 - Election to Deduct Disaster Loss worksheet to prepare this page.

Form 7004 – Option to Carry Extension Payment to Return

The option defaults in Office Manager and Extensions > Federal Extension option has changed from "Do NOT carry extension amount to return" to "Automatically carry extension payment amount to return."

Form 7004 – Option to Produce All State Extensions

The option to "Produce all state first extensions" was added to Extensions > Federal Extension.

Form 8904

- Credit for Oil and Gas Production from Marginal Wells is available for the 2017 tax year.
  - Use Credits > 8904 - Credit for Oil and Gas Production from Marginal Wells to prepare the credit form, or use the Other Enacted Credits worksheet to claim the credit on Schedule K/K-1.
- Special allocation code 5742 is added for allocation of this credit among the shareholders in the return.

Form 8975 and Schedule A (Form 8975)

- Country-by-Country Report (Form 8975) and its Schedule A for Tax Jurisdiction and Constituent Entities information are available for both electronic filing and paper filing for 2016 (fiscal year only) and 2017 tax years.
    - Use Other > 8975 - Country-by-Country Report worksheet to prepare Form 8975.
    - Use Other > Schedule A (Form 8975) - Tax Jurisdiction and Constituent Entity Information worksheet to prepare Schedule A (Form 8975).
- Schedule A (Form 8975) - Tax Jurisdiction information can be imported from an Excel® worksheet.
    - Other > Schedule A (Form 8975) - Tax Jurisdiction Country-by-Country
- Constituent Entities information can be imported from an Excel® worksheet.
    - Export > Constituent Entities of the MNE Group per Tax Jurisdiction
- Any additional information of a Tax Jurisdiction can be imported from an Excel® worksheet to the return under Export > Tax Jurisdiction Additional Information.

Schedule M-3 - Carry M-3 Permanent Differences to SCH K and K-1

New option on Sch. L/M > Schedule M-3 > General and Net Income (Loss) Reconciliation worksheet to carry permanent differences to Schedule K, Line 16b, other tax-exempt or Line 16c, nondeductible expenses.

1120S Consolidated

New consolidated option on Consolidated > Options to carry manual income and deduction adjustments to Schedule M-3.

Shareholder State Information Worksheet

New shareholder state information worksheet added to specific shareholder information section for import and data entry at the consolidated level.

Shareholder Basis

New drill downs for Shareholder Basis worksheets.

Principal Business Activity Codes

The IRS has revised the list of Principal Business Activity Codes on 2017 filing instructions for Form 1120S. Please review the list on Form 1120S instructions. There are some additions, some deletions and some description changes.

If the return is pro formaed from prior year, please check the principal business activity code on Basic Data > General Information > Business code for its accuracy.

Category	2016 Code	2017 Code	Addition/ Deletion/ Change	Description	Note
Mining		211120	Add	Crude Petroleum Extraction	

Category	2016 Code	2017 Code	Addition/ Deletion/ Change	Description	Note
Mining		211130	Add	Natural Gas Extraction	
General Merchandise Stores		452300	Add	General Merchandise Stores, Incl. Warehouse Clubs and Supercenters	
Rental and Leasing Services		532283	Add	Home Health Equipment Rental	
Rental and Leasing Services		532284	Add	Recreational Goods Rental	
Rental and Leasing Services		532289	Add	All Other Consumer Goods Rental	
General Merchandise Stores	452110	452200	Change Code	Department Stores	No change to description
Rental and Leasing Services	532220	532281	Change Code	Formal Wear & Costume Rental	No change to description
Rental and Leasing Services	532230	532282	Change Code	Video Tape and Disc Rental	No change to description
General Merchandise Stores	452900		Delete	Other General Merchandise Stores	
Rental and Leasing Services	532290		Delete	Other Consumer Goods Rental	
Mining	211110		Delete	Oil and Gas Extraction	

Extension Payment Amount

The wording in Office Manager of option “Do not automatically carry extension payment amount to the return” is now changed to “Automatically carry extension payment amount to the return.” Therefore, the default is now **not** to carry the extension payment amount to the return unless the Office Manager option is checked.

Suppression of Printing Overall Statements for Form 1120S

An option is added to suppress all Form 1120S statements on Return Options > Processing Options > Suppress all statements below.

Section 165(i) of Election to Deduct Disaster Loss in the Tax Year Immediately Preceding Tax

Federal Elections > Deduct Disaster Loss in the Tax Year Immediately Preceding Tax Year of Disaster section is deleted.

Confirm Accuracy of Data Transferred from Prior Year

A new field is added on General > Basic Data > General > Confirm accuracy of data transferred from prior year. This is used for some states that require verification of certain identification information to electronically file. Mark this field to confirm the data accuracy and clear the disqualifying diagnostic.

States

Arizona

There are new forms:

- AZ 338-S Credit for Investment in Qualified Small Businesses
- AZ 342-S Credit for Renewable Energy Industry
- AZ 343-S Renewable Energy Production Tax Credit
- AZ 345-S Credit For New Employment

Arkansas

We added the following:

- Page 2 for Form AR 1000CR, Composite Return.
- Form AR1055-CR, Request for Extension of Time for Filing Composite Income Tax Returns.

Connecticut

Form CT 1065/1120SI, Schedules B and D, Supplemental Parts 3 through 7 have been changed to accommodate presentation compliance.

Delaware

We added Form DE 1100P-EXT, S Corporation Request for Extension.

District of Columbia

We added Combined Reporting Schedule 1A and 1B, Computation of Cost of Goods Sold to provide support for Combined returns.

Maryland

We added Form 548, Power of Attorney.

Michigan

We added Form MI-1041ES, Fiduciary Voucher for Estimated Income Tax and Worksheet for Composite Returns.

Minnesota

We added the following:

- Electronic filing for estimates.
- Vouchers for Amended Return Payment, Estimated Tax Payment, Tax Return Payment and Extension Payment.

Nevada

We added NV EXT, Application for 30-day Extension of Time to File and Pay Commerce Tax.

New York

We added separate signature forms for NY TR-579-CT for electronic filing.

New York - New York City

We added the following:

- Separate signature forms for NYC 579-COR for electronic filing.
- New York City Subchapter S Banking Return is added (It is also added to the 2016 tax year).
  - Use New York City > New York City Banking worksheet to prepare New York City banking returns.

Ohio

We added Form UPC, Ohio Universal Payment Coupon.

South Carolina

Electronically filed financial transactions are available for Direct Debit/Deposit.

Fiduciary (1041) Product Enhancements - Worksheet View

Return to Table of Contents.

Federal

We aligned CONS, 1099INT, and 1099DIV so all entries are available on each.

We added the following:

- A Schedule B, Line 10 drill down (Other amounts paid or distributed)
- K-1 AMT Workpapers
- Self-Charged Interest to passthroughs
    - Income > Schedule E, Page 2 – Fiduciary Passthrough [K-1 1041] > Interest and Dividends > Interest
    - Income > Schedule E, Page 2 – Partnership Passthrough [K-1 1065] > Interest and Dividends > Interest
    - Income > Schedule E, Page 2 – Large Partnership Passthrough [K-1 1065-B] > Interest and Dividends > Interest
    - Income > Schedule E, Page 2 – S Corporation Passthrough [K-1 1120S] > Interest and Dividends > Interest
- PTP K-1 Aggregation to conform to 1040 change
- Federal K-1 withholding overrides
    - Beneficiaries > Specific Allocation – Other continued > Beneficiary, Grantor, or Owner's Specific Allocations – Other – continued > Federal withholding
- Withholding boxes for Schedule D transactions (matches 1040) in several locations such as the following most common:
    - Income > Sch D / 4797 / 4684 – Gains and Losses [1099-B, I099-S, 2439] > Stocks, Securities, and Other Non-Passive Transactions > Federal tax withheld AND State tax withheld
    - Income > Sch D / 4797 / 4684 – Gains and Losses [1099-B, I099-S, 2439] > Business Property, Casualty and Theft > Federal tax withheld AND State tax withheld
- The ability to state code State Allocations (Beneficiary Information > State K-1 Information > State tax withheld).

Consistency/Usability Changes

- We expanded the use of worksheet view descriptions in lieu of codes.
- We added all allowable fields to all summary grids. This means that, whenever possible, each Summary grid will now contain all the fields found on the Detail grid.
- We added a state e-file estimate grid.

The following are improvements made to worksheet navigation:

- Form 1116 is listed in both Credits and Foreign (Mirrored entries).
- Schedule and Form names are explicitly stated.

Grid Import Templates

We changed the import template for the Consolidated 1099 Gains and Loss import to match the import grid for Schedule D. They will now be consistent with each other and match the templates for 1040.

Extensions

We added a "Prepare All Extensions" option to generate required extensions for all taxing authorities in a return at Extensions > Automatic Extension > Prepare all extensions.

States

We added electronic filing for the following:

- AR – Extension
- CA – Grantor trusts
- KY – Form 741
- NH - Business Profits Tax Return

Note: LA is under consideration, pending receipt of the schema.

California

We added state 8878, extension signature document, to the extension print package.

Illinois

We added Form IL-1041 Schedule SA, Specific Accounting Method of Computing Net Income for Fiduciaries.

- The input is on Income / Deductions > Schedule SA.

Indiana

We added Schedule COMPOSITE-COR, Composite AGI Return for Corporations.

Kentucky

We added the following:

- Form 8879-F, Electronic Filing Signature document
- Form 741-V, Payment Voucher for electronically filed returns

Louisiana

Presuming electronic filing is added:

- Form LA8453F, Fiduciary Income Tax Declaration for Electronic Filing
- Form R-6466V (EXT) - Fiduciary Income Tax Electronically Filed Extension Payment Voucher

Maryland

We added Form 504A, Schedule A.

Massachusetts

We added the following:

- Schedule OJC, New Credit for Taxes Paid
- 2D barcode

Minnesota

We added the following:

- Fiduciary Amended Return Payment form
- Extension Payment form
- Return Payment form

Nevada

We added an application for 30 Day Extension.

New York

We added the following:

- Form IT-603, Claim For EZ Investment Tax Credit and EZ Employment Incentive Credit
    - New York > Credits > EZ ITC and EZ EIC (Form IT-603)
- Form IT-219, Credit for New York City Unincorporated Business Tax
    - New York > Credits > Credit for New York City Unincorporated Business Tax (IT-219)
- Form IT-223, Innovation Hot Spot Deduction
    - New York > Credits > Innovation Hot Spot Deduction [IT-223]
- Form IT-249, Claim for Long-Term Care Insurance Credit
    - New York > Credits > Long Term Care Insurance Credit [IT-249]
- Form IT-256, Claim For Special Additional Mortgage Recording Tax Credit
    - New York > Credits > Claim for Special Additional Mortgage Recording Tax Credit [IT-256]
- Form IT-607, Claim for Excelsior Jobs Program Tax Credit
    - New York > Credits > Claim for Excelsior Jobs Program Tax Credit [IT-607]
- Form IT-398 Input for Assets (like 1120/1120S).
    - New York > Income / Deductions > Depreciation Adjustment
- Forms W2, W2-G, 1099-G (EF only)
    - New York > E File Options > IRS W-2 OR IRS W-2G OR E-File 1099-G
- Form TR-573.2 – NY E-file Mandate Info
- State 8878, extension signature document to extension print package

Rhode Island

We added Form 1041-V, Payment Voucher

South Carolina

We added Form I-41, Nonresident Beneficiary Affidavit and Agreement.

- Income/Deductions > Other Adjustments, Taxes and Credits > Form I41 print option code

Virginia

We added Schedule 770-VK-1, Beneficiary Schedule.

Wisconsin

We added the following:

- Schedule AR, Explanation of Amended Return.
    - Other > Amended Return Information > Schedule AR – Explanation of Amended Return
- Schedule DC, Development Zone Credits.
    - Credits > Schedule CR Credits > Development Zones Credit (Schedule DC)
- Schedule EC, Enterprise Zone Credit.
    - Credits > Schedule CR Credits > Enterprise Zone Jobs Credit (Schedule EC)
- Schedule ED, Economic Development Tax Credit.
    - Credits > Schedule CR Credits > Economic Development Tax Credit (Schedule ED)
- Schedule HR, Historic Rehabilitation Credit.
    - Credits > Schedule CR Credits > Historic Rehabilitation Credit (Schedule HR)
- Schedule VC, Venture Capital Credits.

Estate and Gift (706/709) Product Enhancements - Worksheet View

Return to Table of Contents.

There are no updates available with this release.

Exempt Organization (990) Product Enhancements - Worksheet View

Return to Table of Contents.

Federal

We added the following:

- Input to produce all state extensions for all states prepared in a return (Extensions > Form 8868 General Information > Produce all state first extensions).
- Date of Withdrawal/Deposit to Direct Debit/Deposit Report.
- Descriptions rather than codes in Worksheet drop down fields, so the choice will be visible without clicking.
- Detail to Worksheet View Summary Grids.

States

Florida

We added electronic filing.

Employee Benefit Plan (5500) Product Enhancements - Worksheet View

Return to Table of Contents.

There are no updates available with this release.

Tax Product Enhancements 2017.01000 - Interview View

Individual (1040) Product Enhancements - Interview View

Return to Table of Contents.

Federal

- We aligned the fields on the Consolidated 1099, 1099-INT, and 1099-DIV source documents input.
- We no longer disqualify e-filed extensions (FD or state) after the due date.

Direct Deposit/Debit

We appended the scheduled date for withdrawal to the text in the Debit/Deposit column, which will show when the withdrawal is scheduled for all return types, including estimate payments.

1040NR, U.S. Nonresident Alien Income Tax Return

- We added e-file for TY 2016.
- We added Form 1042-S as a supporting source document.
  - Library only – required to clear diagnostics that represent IRS rejects.

1099MISC

We added a code for Nonemployee Compensation so the amount will carry to both Other Income and Schedule SE.

- Interview Form IRS-1099MISC, Box 129

Form 5471

We added a new Schedule G, Line 3 statement.

Form 8621 Excess

We improved the look and content of this worksheet by changing it to a small font.

Form 8903

Prior year basis, at-risk and passive domestic production loss carryovers will now carry to Form 8903 and be used in the calculation of QPAI.

Pro Forma of Estimated Payments

We now pro forma (for informational purposes only) the prior year's calculated estimated tax payments in the following year's return. If there are estimate amounts entered and the "Include prior year estimate amounts on current year return" field is selected on Interview Form T-2, Box 46, we issue a diagnostic indicating we used the keyed amount, not the memo amount.

Extensions

We added the Prepare All Extensions Option to generate required extensions for all taxing authorities in a return.

- Interview Form EXT-1, Box 37

States

Agreements with State Taxing Authorities (Letters of Intent)

We must comply with the following requirements from States governing paper and e-file submissions:

- Restrictions on Pro Forma (transfer of data)
  - The following states will not allow us to pro forma driver's license numbers and State IDs: AL, CT, IA, ID, IN, ME, NC, ND, NE, NJ, NM, OK, WI.
  - The following states will not allow us to pro forma bank information (account numbers), driver's license numbers, or State IDs: AR, IL, SC, WV.
  - This state will not allow us to pro forma driver's license number, State ID, bank information, State PINs or locality codes: VA.
  - The following states require the preparer to confirm pro formaed data: CO, KY, MD, MN.
  - The following states require two-step verification of various items: AR, OR.
- Most states now require us to include refund/ID theft statements and associated URLs in the return (this is handled in Help).
- We will disqualify the return from e-file if driver's license information is not in the return for: AL, CT, NM, NY and OH. Per these States, you will not be able to electronically file these returns until you enter the information.

Alabama

We added Schedule IRC – Irrigation/Reservoir System Credit.

- Interview Form AL9A

Arkansas

We added AR1000CE, Teacher's Classroom Investment Expense.

- Interview Form AR9

California

We added the following:

- State 8878, extension signature document to extension print package
- Schedule X – Amended Return Worksheet

Colorado

We added the following:

- EF estimates
  - Interview Form CO1, Box 61
- DR 0350 – First Time Home Buyers Subtraction
  - Interview Form CO2, Boxes 55 – 63

District of Columbia

We are no longer offering a refund card as an option due to new requirements.

Kansas

There is a new three-bracket rate structure.

Kentucky

We added Schedule KW-2, Kentucky Income Tax Withheld (mandatory for paper filed returns only).

Massachusetts

We changed the default for MA bank interest that is applied to MA resident returns.

Michigan

Form 1040X is obsolete and has been replaced by Form 5530.

Michigan – DTW

We added Detroit Form 5338, Underpayment of Estimated Tax

- Interview Form DTW5A

Minnesota

We added the following:

- Schedule M1529, Education Savings Account Contribution Credit or Subtraction
    - Interview Form MN11, Box 50-56
- Schedule M1SLC, Student Loan Credit
    - Interview Form MN11, Boxes 80-87
- Schedule M1RCR, Credit for Tax Paid to Wisconsin
    - Interview Form MN12, Boxes 50-64
- Schedule M1HOME, First-Time Homebuyer Savings Account
- Schedule M1AR, Accelerated Recognition of Installment Sale Gains
- Credit for Taxes Paid worksheet for e-file

Missouri - St. Louis

We added Form E-8, Application for Extension of Time to File Business Earnings Tax Return.

Montana

- An Amended return is now included on Form 2.
    - Interview Form MT13
- NOL information is now included on Form 2
    - Interview Form MT14

Nevada

We added an Application for 30 Day Extension.

New Hampshire

- We added Business Profits Tax e-file.
- We removed the sole proprietor versions of the Business Profits Tax forms. LLC versions are available exclusively.

New York

We added the following:

- State 8878, extension signature document to extension print package
- Form IT-219, Credit for New York City Unincorporated Business Tax
  - Interview Form NY13, Boxes 80 – 92
- Form IT-223, Innovation Hot Spot Deduction
  - Interview Form NY39, Boxes 80 – 125
- Form IT-249, Claim for Long-Term Care Insurance Credit
  - Interview Form NY15, Boxes 30 – 51
- Form IT-256, Claim For Special Additional Mortgage Recording Tax Credit
  - Interview Form NY16, Boxes 30 – 68
- Form IT-603, Claim For EZ Investment Tax Credit and EZ Employment Incentive Credit
  - Interview Form NY35
- Form IT-607, Claim for Excelsior Jobs Program Tax Credit
  - Interview Form NY37, Boxes 50 – 74
- Form IT-398 Input for Assets as in 1120/1120S
  - Interview Form NY41
- Forms W2, W2-G, 1099-G-EF only
  - Interview Forms IRS-W2, IRS-W2G, and IRS-1099G

New York - New York City

We added city 8878 signature document to extension print package.

North Carolina

We added Schedule PN, Part-year Resident and Nonresident Schedule.

Oregon

We added the following:

- OR-WFHDC, Oregon Working Family Household and Dependent Care Credit Worksheet
  - Interview Forms OR7 and OR8
- Retention document for calculating prior year Working Family and Household Add Dependent Care Credit
  - Interview Form OR8

Pennsylvania

- We separated Schedule G-L override logic in the following manner:
  - One override no longer requires all fields to be overridden.
  - Existing input has been updated to include only one column with a TS code to indicate taxpayer or spouse.
- Schedule A/B will not split into separate schedules if any overrides are entered.
- We now treat the Taxpayer/Joint column as jointly filed input if all other entries are coded joint and as Taxpayer input if any other entries are coded as Taxpayer or Spouse (Interview Form PA1A and Interview Form PA1B).
- We added an option to force separate schedules.
- Overrides have been expanded to all lines.

South Carolina

We added an Out of State Income/Loss statement.

- The new adjustment options added for this are on Interview Form SC1, Box 44.

Tennessee

We added FAE172, Quarterly Franchise, Excise Tax Declaration e-file.

- Interview Form TN4, Boxes 30 - 48

Vermont

We added the ability to batch e-file extensions.

Wisconsin

We added the following:

- Schedule GL, Gain or Loss on the Sale of Your Home
  - Interview Form WI10, Boxes 60-69
- Credit for Taxes Paid worksheet for e-file

Partnership (1065) Product Enhancements - Interview View

Return to Table of Contents.

Federal

We added the following:

- Date of Withdrawal/Deposit to Direct Debit/Deposit Report
- Input reversals for Office Manager default options
- 1065 – Form 8082, Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)
    - Including an option to provide compliant presentation for Amended Returns to provide a blank Form 1065 when Form 8082 is filed (available in 2016)
- Form 8975, Country-by-Country Report and Form 8975, Schedule A, Tax Jurisdiction and Constituent Entity Information

States

Arizona

The following are new forms:

- AZ 338-P Credit for Investment in Qualified Small Businesses
- AZ 342-P Credit for Renewable Energy Industry
- AZ 343-P Renewable Energy Production Tax Credit
- AZ 345-P Credit For New Employment

Arkansas

We added the following:

- Page 2 for Form AR 1000CR, Composite Return
- Form AR1055-CR, Request for Extension of Time for Filing Composite Income Tax Returns
- Form AR1055-PE, Request for Extension of time for Filing Partnership Tax Returns

California

California Magnetic Media is retired. Effective January 1, 2018, FTB will discontinue the Paperless Schedules K-1 (565 or 568) program.

Connecticut

Form CT 1065/1120SI, Schedules B and D, Supplemental Parts 3 through 7 have been changed to accommodate presentation compliance.

District of Columbia

We added Combined Reporting Schedule 1A and 1B, Computation of Cost of Goods Sold to provide support for Combined returns.

Georgia

We added 2D Barcode.

Indiana

We added Schedule Composite-COR, Composite Indiana Adjusted Gross Income Tax Return for Corporate Entities.

Maryland

We added Form 548, Power of Attorney.

Michigan

We added Form MI-1041ES, Fiduciary Voucher for Estimated Income Tax and Worksheet for Composite Returns.

Minnesota

We added the following:

- Electronic filing for estimates
- Vouchers for Amended Return Payment, Estimated Tax Payment, Tax Return Payment and Extension Payment

Nevada

We added Form NV EXT, Application for 30-day Extension of Time to File and Pay Commerce Tax.

New York

We added state input to support Form IT-398 when Totals Depreciation is used.

Ohio

We added Form UPC, Ohio Universal Payment Coupon.

South Carolina

Electronically filed financial transactions are available for Direct Debit/Deposit.

Corporation (1120) Product Enhancements - Interview View

Return to Table of Contents.

Federal

We added input to produce all state extensions for all states prepared in a return.

- Interview Form EXT-1, Box 120

Late Filing Penalty

The minimum late filing penalties for federal returns filed more than 60 days late have been increased. The penalty is the greater of (a) $210 or (b) 10% of the tax due. This provision applies to tax years beginning in 2017.

Pro Forma of Estimated Payments

We now pro forma (for informational purposes only) the prior year's calculated estimated tax payments in the following year's return. If there are estimate amounts entered and the "Include prior year estimate amounts on current year return" field is selected on Interview Form T-2, Box 46, we issue a diagnostic indicating we used the keyed amount, not the memo amount.

Prior Year Estimates as Current Year Tax Payments

The wording for the Office Manager option to include prior year estimates for federal/state returns as tax payments in the next year's Pro Forma changed from "do NOT Include federal and state estimate amounts" to "Include federal and state estimate amounts." If the option is checked, federal estimates will pro forma to Interview Form P-1, Boxes 30 through 46 and state estimates will pro forma to STPAY-1, Boxes 31 - 57.

Suppress Page 1 Statements

We added a Suppress Printing of Statements option on Page 1 statements on Form 4A, Box 70.

Schedule D, page 2 Part IV Alternative Tax for Corporations with Qualified Timber Gain

This is no longer applicable for 2017.

Form 1120-F

- We added a new question CC on Form 1120-F, Page 2.
  - The input is on Interview Form FC-1, Box 73.
    - If the question is answered "yes," statement information input on FC-4, Box 35 with the new code "5" on Box 34 is required.
- We added overrides for dividend equivalents.
  - Items on Federal Interview Form FC-2, Boxes 105-107.
- Form 1120-F, Page 3, Section I, Line 2 Dividends now includes Lines 2a and 2b.
  - Line 2a, Dividends input is on Interview Form FC-2, Boxes 84 through 95.
  - Line 2b, Column b input is on Interview Form FC-2, Box 96.
  - Line 2b, Column e input is on Interview Form P-1, Box 31.

Form 1120-H

We added a drill down for Form 1120-H, Page 1, Line C.

Form 1120-L

- The restatement of reserves from statutory annual statement to tax return is now automatically computed for Schedule F, Lines 1-6.

The following features have been added:

- A drill down with A/S source references
- A reconciliation from A/S to tax return
- Supporting statements included with tax return
- An automatic carry from NAIC import
- The ability to change/override all system computations with code "Q" on Box 32

Form 1120-PC

We added a check box to Form 1120-PC, Page 1, indicating Schedule B is being filed and questions to Page 7 on diversification requirements before filing Schedule B.

- Interview Form PC-1, Box 37

Form 1120-REIT

We added four new lines (2b, 2c, 5b, and 5c) to Form 1120-REIT, Page 2, Part III – Tax for Failure to Meet Certain Source-of-Income Requirements (Lines 2c and 5c are the same).

- The input is on Interview Form REIT-2, Boxes 61, 62, and 63.

Form 4684 – Casualties and Theft

We added Page 4 to Elect to Deduct Federally Declared Disaster Loss in Preceding Tax year and Revoke a Prior Year Election.

- The input is on Interview Form D-1B.

Form 4810

This form is only produced when Form 1120-SF for Settlement Funds is present.

- The input is on Interview Form SF-2.

Form 7004 – Option to Carry Extension Payment to Return

This option defaults in Office Manager and Interview Form EXT-1, Box 48 has changed from "Do NOT carry extension amount to return" to "Automatically carry extension payment amount to return."

Form 7004 – Option added to Produce All State Extensions

We added the option "X to produce all state first extensions" to Interview Form EXT-1, Box 120.

Form 8827 – Credit for Prior Year Minimum Tax

Carryover Information will no longer pro forma to Interview Form P-1A, Box 41, but it will still pro forma to Interview Form A-5.

Form 8903

We added a drill down for Form 8093.

Form 8904

- Credit for Oil and Gas Production from Marginal Wells is available for the 2017 tax year.
  - Use Federal Interview Form P-8 to prepare the credit form.
  - Use Federal Interview Form P-14, Box 33 to claim the credit on Schedule K/K-1.
- Special allocation code 5742 is added for allocation of this credit among the shareholders in the return.

Form 8926 – Disqualified Corporate Interest Expense Disallowed Under 163(j)

We added extensive drill downs to Lines 1a, 1b, 1d, 1f, 2a, 2b, 3a, 3b, 3c, 3d, 4b, 7, and 8a.

Form 8975 and Schedule A (Form 8975)

Country-by-Country Report (Form 8975) and its Schedule A for tax jurisdiction and constituent entity information are available for both electronic filing and paper filing for 2016 (fiscal year only) and 2017 tax years.

- Use Federal Interview Form FCR1 to prepare Form 8975.
- Use Federal Interview Form FCR2 to Schedule A (Form 8975).

Schedule PH (Form 1120)

We added IRS Tests Used to Exclude Items of PHC Income added to Schedule PH, Lines 18-21.

- The input is on Interview Form PH-3.

Principal Business Activity Codes

The IRS has revised the list of Principal Business Activity Codes on 2017 filing instructions for Form 1120. Please review the list on Form 1120 instructions. There are some additions, some deletions, and some description changes.

If the return is pro formaed from the prior year, please check the principal business activity code on Federal Interview Form 1, Box 53 for accuracy.

Category	2016 Code	2017 Code	Addition/ Deletion/ Change	Description	Note
Mining		211120	Add	Crude Petroleum Extraction	
Mining		211130	Add	Natural Gas Extraction	
General Merchandise Stores		452300	Add	General Merchandise Stores, Incl. Warehouse Clubs and Supercenters	
Rental and Leasing Services		532283	Add	Home Health Equipment Rental	
Rental and Leasing Services		532284	Add	Recreational Goods Rental	

Category	2016 Code	2017 Code	Addition/ Deletion/ Change	Description	Note
Rental and Leasing Services		532289	Add	All Other Consumer Goods Rental	
General Merchandise Stores	452110	452200	Change Code	Department Stores	No change to description
Rental and Leasing Services	532220	532281	Change Code	Formal Wear & Costume Rental	No change to description
Rental and Leasing Services	532230	532282	Change Code	Video Tape and Disc Rental	No change to description
General Merchandise Stores	452900		Delete	Other General Merchandise Stores	
Rental and Leasing Services	532290		Delete	Other Consumer Goods Rental	
Mining	211110		Delete	Oil and Gas Extraction	

Extension Payment Amount

The wording in Office Manager of option “Do not automatically carry extension payment amount to the return” is now changed to “Automatically carry extension payment amount to the return.” Therefore, the default is now **not** to carry the extension payment amount to the return unless the Office Manager option is checked.

Section 165(i) of Election to Deduct Disaster Loss in the Tax Year Immediately Preceding Tax

Federal Interview Form FE-3, Boxes 80 - 83 are deleted.

Confirm Accuracy of Data Transferred from Prior Year

A new field is added on Federal Interview Form 1, Box 110. This is used for some states that require verification of certain identification information to electronically file. Mark this field to confirm the data accuracy and clear the disqualifying diagnostic.

Consolidated

We added the following:

- Computed Only Totals for Ending Eliminations to the Consolidated Balance Sheet
- Schedule M-3 statements for Other Income/Loss items (M-3, Part II, Lines 25 and 28) and for Other Expense/Deduction Items (M-3, Part III, Line 37).
- A consolidated diagnostic when Section 280(c) election is present to elect the reduced research credit on Form 6765 instead of reducing other deductions differs between the consolidated return and any separate companies the following diagnostic will be issued:

  CAUTION

  Section 280(c) election between separate company return(s) and consolidated return is different. All members of a consolidated return must adopt the same election. Otherwise the credit computation as well as carryover to the future year may be incorrect.

States

We added electronic filing for the following:

- District of Columbia consolidated
- Nebraska consolidated
- North Carolina consolidated

District of Columbia

We combined Reporting Schedule 1A and 1B, Computation of Cost of Goods Sold to provide support for Combined returns.

Illinois

We added IL-1120 Schedule SA, Specific Accounting Method of Computing Net Income for Corporations.

Kentucky

We added Schedule L-C, Limited Liability Entity Tax.

Maryland

We added Form 548, Power of Attorney.

Minnesota

We added the following:

- Electronic filing for estimates.
- Vouchers for Amended Return Payment, Estimated Tax Payment, Tax Return Payment, and Extension Payment for 1120 and UBIT.

Nevada

We added Form NV EXT, Application for 30-day Extension of Time to File and Pay Commerce Tax.

New York

We added separate signature forms in NY TR-579-CT for electronic filing.

New York - New York City

We added separate signature forms in NYC 579-COR for electronic filing.

South Carolina

Electronically filed financial transactions are available for Direct Debit/Deposit.

S Corporation (1120S) Product Enhancements - Interview View

Return to Table of Contents.

Federal

We added input to produce all state extensions for all states prepared in a return.

- Interview Form EXT-1, Box 120

Pro Forma of Estimated Payments

We now pro forma (for informational purposes only) the prior year's calculated estimated tax payments in the following year's return. If there are estimate amounts entered and the "Include prior year estimate amounts on current year return" field is selected on Interview Form T-2, Box 46, we issue a diagnostic indicating we used the keyed amount, not the memo amount.

Prior Year Estimates as Current Year Tax Payments

The wording for the Office Manager option to include prior year estimates for federal/state returns as tax payments in next year's Pro Forma changed from "do NOT Include federal and state estimate amounts" to "Include federal and state estimate amounts."

Form 4684, Page 4

We added Page 4 of Form 4684 for election to deduct federally declared disaster loss in preceding tax year and revocation of prior election.

- Use federal Interview Form D-1B to prepare this page.

Form 7004 – Option to Carry Extension Payment to Return

The option defaults in Office Manager and Interview Form EXT-1, Box 48 have changed from "Do NOT carry extension amount to return" to "Automatically carry extension payment amount to return."

Form 7004 – Option to Produce All State Extensions

The option "X to produce all state first extensions" was added to Interview Form EXT-1, Box 120.

Form 8904

The Credit for Oil and Gas Production from Marginal Wells is available for the 2017 tax year.

- Use Federal Interview Form P-8 to prepare the credit form, or use Federal Interview Form P-14, Box 33 to claim the credit on Schedule K/K-1.
- Special allocation code 5742 is added for allocation of this credit among the shareholders in the return.

Form 8975 and Schedule A (Form 8975)

These forms have been added to report certain information with respect to U.S. Multi-National Entity group on a country-by-country basis.

- The input is on Interview Form FCR-1.
- The input for Schedule A (Form 8975) is on Interview FCR-2.

Schedule M-3 - Carry M-3 Permanent Differences to SCH K and K-1

There is a new option on Interview Form L-5, Box 110 to carry permanent differences to SCH K, Line 16b, Other Tax-Exempt Income or to Line 16c, Nondeductible Expenses.

1120S Consolidated

There is a new consolidated option on Interview Form CC-1, Box 132 to carry manual income and deduction adjustments to Schedule M-3.

Shareholder Basis

There are new drill downs for Shareholder Basis worksheets.

Principal Business Activity Codes

The IRS has revised the list of Principal Business Activity Codes on 2017 filing instructions for Form 1120S. Please review the list on Form 1120S instructions. There are some additions, some deletions, and some description changes.

If the return is pro formaed from the prior year, please check the principal business activity code on federal Interview Form 1, Box 53 for accuracy.

Category	2016 Code	2017 Code	Addition/ Deletion/ Change	Description	Note
Mining		211120	Add	Crude Petroleum Extraction	
Mining		211130	Add	Natural Gas Extraction	
General Merchandise Stores		452300	Add	General Merchandise Stores, Incl. Warehouse Clubs and Supercenters	
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Rental and Leasing Services		532284	Add	Recreational Goods Rental	
Rental and Leasing Services		532289	Add	All Other Consumer Goods Rental	
General Merchandise Stores	452110	452200	Change Code	Department Stores	No change to description
Rental and Leasing Services	532220	532281	Change Code	Formal Wear & Costume Rental	No change to description

Category	2016 Code	2017 Code	Addition/ Deletion/ Change	Description	Note
Rental and Leasing Services	532230	532282	Change Code	Video Tape and Disc Rental	No change to description
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Rental and Leasing Services	532290		Delete	Other Consumer Goods Rental	
Mining	211110		Delete	Oil and Gas Extraction	

Extension Payment Amount

The wording in Office Manager of option “Do not automatically carry extension payment amount to the return” is now changed to “Automatically carry extension payment amount to the return.” Therefore, the default is now **not** to carry the extension payment amount to the return unless the Office Manager option is checked.

Suppression of Printing Overall Statements for Form 1120S

An option is added to suppress all Form 1120S statements on Federal Interview Form 4, Box 120.

Section 165(i) of Election to Deduct Disaster Loss in the Tax Year Immediately Preceding Tax

Federal Interview Form FE-3, Boxes 80 - 83 are deleted.

Confirm Accuracy of Data Transferred from Prior Year

A new field is added on Federal Interview Form 1, Box 110. This is used for some states that require verification of certain identification information to electronically file. Mark this field to confirm the data accuracy and clear the disqualifying diagnostic.

States

Arizona

The following are new forms:

- AZ 338-S Credit for Investment in Qualified Small Businesses
- AZ 342-S Credit for Renewable Energy Industry
- AZ 343-S Renewable Energy Production Tax Credit
- AZ 345-S Credit For New Employment

Arkansas

The following have been added:

- Page 2 for Form AR 1000CR, Composite Return
- Form AR1055-CR, Request for Extension of Time for Filing Composite Income Tax Returns

Connecticut

Form CT 1065/1120SI, Schedules B and D, Supplemental Parts 3 through 7 have been changed to accommodate presentation compliance.

Delaware

We added Form DE 1100P-EXT, S Corporation Request for Extension.

District of Columbia

We added Combined Reporting Schedule 1A and 1B, Computation of Cost of Goods Sold to provide support for Combined returns.

Maryland

We added Form 548, Power of Attorney.

Michigan

We added Form MI-1041ES, Fiduciary Voucher for Estimated Income Tax and Worksheet for Composite Returns.

Minnesota

We added the following:

- Electronic filing for estimates
- Vouchers for Amended Return Payment, Estimated Tax Payment, Tax Return Payment, and Extension Payment

Nevada

We added Form NV EXT, Application for 30-day Extension of Time to File and Pay Commerce Tax.

New York

We added separate signature forms to NY TR-579-CT for electronic filing.

New York - New York City

We added separate signature forms to NYC 579-COR for electronic filing.

Ohio

We added Form UPC, Ohio Universal Payment Coupon.

South Carolina

Electronically filed financial transactions are available for Direct Debit/Deposit.

Fiduciary (1041) Product Enhancements - Interview View

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Federal

We aligned CONS, 1099INT, and 1099DIV so all entries are available on each.

We added the following:

- A Schedule B, Line 10 drill down (Other amounts paid or distributed)
- K-1 AMT Workpapers
- Self-Charged Interest to passthroughs.
  - Interview Form IRS K-1 1041, Box 183
  - Interview Form IRS K-1 1065, Box 297
  - Interview Form IRS K-1 1120S, Box 273
- Federal K-1 withholding overrides
  - Interview Form K-5A, Box 79
- Withholding boxes for Schedule D transactions (matches 1040) n several locations. The most common are as follows:
  - Interview Form D-1, Boxes 256 and 257
  - Interview Form D-1A, Boxes 122 and 123
  - Interview Form D-2, Boxes 180 and 181
- The ability to state code State Allocations (Interview Form K-7, Box 126)

Grid Import Templates

We changed the import template for the Consolidated 1099 Gains and Loss import to match the import grid for Schedule D. They will now be consistent with each other and match the templates for 1040.

Extensions

We added a "Prepare All Extensions" option to generate required extensions for all taxing authorities in a return.

- Interview Form EXT-1, Box 40

States

We added electronic filing for the following:

- AR – Extension
- CA – Grantor trusts
- KY – Form 741
- NH - Business Profits Tax Return

Note: LA is under consideration, pending receipt of the schema.

California

We added the state 8878, extension signature document to the extension print package.

Illinois

We added a Form IL-1041, Schedule SA, Specific Accounting Method of Computing Net Income for Fiduciaries.

- Interview Form IL23

Indiana

We added Schedule COMPOSITE-COR, Composite AGI Return for Corporations.

Kentucky

We added the following:

- Form 8879-F, Electronic Filing Signature document
- Form 741-V, Payment Voucher for electronically filed returns

Louisiana

Presuming electronic filing is added:

- Form LA8453F, Fiduciary Income Tax Declaration for Electronic Filing
- Form R-6466V (EXT) - Fiduciary Income Tax Electronically Filed Extension Payment Voucher

Maryland

We added Form 504A, Schedule A.

Massachusetts

We added the following:

- Schedule OJC, New Credit for Taxes Paid
- 2D barcode

Minnesota

We added the following:

- Fiduciary Amended Return Payment Form
- Extension Payment Form
- Return Payment Form

Nevada

We added an Application for 30 Day Extension.

New York

We added the following:

- Form IT-603, Claim For EZ Investment Tax Credit and EZ Employment Incentive Credit
    - Interview Form NY23
- Form IT-219, Credit for New York City Unincorporated Business Tax
    - Interview Form NY21

- Form IT-223, Innovation Hot Spot Deduction
    - Interview Form NY21
- Form IT-249, Claim for Long-Term Care Insurance Credit
    - Interview Form NY21
- Form IT-256, Claim For Special Additional Mortgage Recording Tax Credit
    - Interview Form NY22
- Form IT-607, Claim for Excelsior Jobs Program Tax Credit
    - Interview Form NY21
- Form IT-398 Input for Assets as in 1120/1120S
    - Interview Form NY25
- Forms W2, W2-G, 1099-G-EF only
    - Interview Forms NY16A, NY16B, NY16C
- Form TR-573.2 – NY E-file Mandate Info.
- State 8878, extension signature document to extension print package

Rhode Island

We added Form 1041-V, Payment Voucher.

South Carolina

We added Form I-41, Nonresident Beneficiary Affadavit and Agreement.

- Interview Form SC2, Box 38

Virginia

We added Schedule 770-VK-1, Beneficiary Schedule.

Wisconsin

We added the following:

- Schedule AR, Explanation of Amended Return
    - Interview Form WI15, Boxes 60-75
- Schedule DC, Development Zone Credits
    - Interview Form WI24, Boxes 30-65
- Schedule EC, Enterprise Zone Credit
    - Interview Form WI23, Boxes 30-45
- Schedule ED, Economic Development Tax Credit
    - Interview Form WI23, Boxes 50-85
- Schedule HR, Historic Rehabilitation Credit
    - Interview Form WI25, Boxes 30-81
- Schedule VC, Venture Capital Credits

Estate and Gift (706/709) Product Enhancements - Interview View

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There are no updates available with this release.

Exempt Organization (990) Product Enhancements - Interview View

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Federal

We added the following:

- Input to produce all state extensions for all states prepared in a return (Interview Form EXT-1, Box 45).
- The Date of Withdrawal/Deposit to the Direct Debit/Deposit Report.

States

Florida

We added electronic filing.

Employee Benefit Plan (5500) Product Enhancements - Interview View

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There are no updates available with this release.