

2017.02000
Release Notes

January 7, 2018



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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 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 2017.02000

CCH[®] ProSystem fx[®] and CCH[®] Global fx Tax

Tax Updates

Tax Cuts and Jobs Act

Those provisions of the Tax Cuts and Jobs Act that apply to Tax Year 2017 filings, specifically medical expenses and bonus depreciation, are planned for Release 2017.02010, scheduled for January 14, 2018.

Print Defaults - Print to Separate PDFs and Create Bookmark PDFs

For Release 2017.02000, for users who have not opened Tax Preparation, we are populating your user-level Tax Preference defaults to "Produce separate PDF files for each copy" and "Create Bookmark PDFs." These options are available in Tax Preparation > Options > Preferences > Tax Return Preferences.

The same default to "Produce separate PDF files for each copy" and "Create Bookmark PDFs" is also updated in Office Manager > Configure Applications > Tax Preparation > Print Options if the Print Options were not modified on Release 2017.01000.

For users who opened Tax Preparation on Release 2017.01000, we will provide an update on Release 2017.02010 which will populate these preferences at that time.

All Systems

Federal elections now respect the masking settings you have requested.

Individual and Fiduciary

Interest and Dividend summary grids have been revised to improve workflow.

Tax Projector

Tax Projector updates reflecting the Tax Cuts and Jobs Act are tentatively planned for Release 2017.02020, scheduled for January 21, 2018.

Pro Forma of Driver's License Information

The following additional states require the preparer to confirm pro formaed data:

- District of Columbia
- Ohio

2017 DataScan

DataScan users may now access our 2017 system-defined keywords and scans. Our predefined scans include useful searches such as "'17 AGI search," which searches for returns with an AGI of more than \$100,000.

Our canned searches are as follows:

- '17 AGI Search
- '17 Clients Residing in Ohio
- '17 Gov't Form Search
- '17 Over 100 Partners
- '17 Rentals Claiming Section 179
- '17 Returns not e-filed
- **New!** '17 Autoflow Used - Fiduciary. Identifies Fiduciary returns with data imported from CCH® ProSystem fx® Scan AutoFlow to assist with verifying the number of 1041 Scan AutoFlow authorizations used. The resulting report lists returns by Client ID and includes Estate or Trust Name and Return Version Number.
- **New!** '17 Autoflow Used - Individual. Identifies Individual returns with data imported from CCH® ProSystem fx® Scan AutoFlow to assist with verifying the number of 1040 Scan AutoFlow authorizations used. The resulting report lists returns by Client ID and includes Taxpayer Name and Return Version Number.

Electronic Filing Updates

Federal

Today the IRS announced an open date for electronic filing of Business and Fiduciary returns of January 8, 2018, and Individual returns of January 29, 2018. We will announce electronic filing release dates for each product based on the IRS publishing final main forms and production schemas.

State

Connecticut is not requiring driver's license information in order to electronically file tax returns. The current list includes Alabama, New Mexico, New York and Ohio. This is updated information from our December 13, 2017, CCH Software News email.

CCH® Global *fx* Tax

Tax Updates

New Audio CAPTCHA

To provide increased accessibility, you can now request "Audio CAPTCHA." This allows you to request a pronunciation of the CAPTCHA code, and solve the CAPTCHA challenge by typing the spoken code.

Global *fx* Organizer

A new option is available to suppress driver's license information on 2017 Organizers. This option is available via the Process Client Organizers > Print Organizers screen.