

**2017.02030**  
**Release Notes**

January 28, 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](http://support.cch.com). In addition to product and account information, the Customer Support site offers answers to our most frequently asked questions, forms release status, Knowledge Base articles, training videos, and operating systems compatibility. Access to these features is available 24/7.

The following website provides important information about the features and updates included in all CCH® ProSystem fx® Tax releases: [Release Notes](#)

Visit the [Application Status](#) web page to view the current status of our CCH applications. The Application Status web page is updated every 15 minutes.

Go to [Contact Us](#) to find information on topics such as Sales and Billing, as well as options to Open a Support Case or Chat with a Representative if you need assistance.

## Information in Tax Year 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 2017.02030

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## Electronic Filing Updates

Corporation Consolidated/Combined Federal and State products will be available on Release 2017.02040 on February 4th, 2018.

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

### Individual

Alabama	Louisiana Nonresident	Ohio
Arizona	Maryland	Ohio Cities - NonRITA
California LLC	Maryland Extensions	Oklahoma
California LLC Extensions	Massachusetts	Vermont
Delaware	Massachusetts Extensions	Vermont Extensions
Georgia	Michigan	West Virginia
Idaho	Minnesota M1PR	Wisconsin
Indiana	Missouri	
Louisiana Resident	New Mexico	

### Partnership

Federal Extensions	Michigan	Oregon Composite
Alabama	Mississippi	Oregon - Multnomah
Alabama PPT	Mississippi Extensions	Rhode Island
Alabama PTE-C	Nebraska	
Delaware	Oregon	

### Corporation

Federal	Kentucky Extensions	New York Additional Extensions
Federal 1120-F	Maine	New York 204-LL
Federal Extensions	Maryland	North Carolina
Alaska	Maryland Extensions	North Carolina Extensions
Arkansas	Massachusetts	North Dakota
Arkansas Extensions	Michigan CIT	Oklahoma
California	Michigan MBT	Oregon
California Extensions	Minnesota	Pennsylvania
California 199	Mississippi	Pennsylvania Extensions
Colorado	Mississippi Extensions	Rhode Island
Connecticut	Missouri	South Carolina
Connecticut Estimate	Montana	Texas
Connecticut Extensions	New Hampshire BT-Summary	Texas Extensions
District of Columbia	New Jersey	Utah
District of Columbia Extensions	New Jersey Estimate	Utah Extensions

Delaware  
Florida  
Florida Extensions  
Iowa  
Kansas  
Kentucky

New Jersey Extensions  
New Jersey Annual Report  
New Mexico  
New York  
New York Estimate  
New York Extensions

Vermont  
Vermont Extensions  
Virginia  
Wisconsin

## S Corporation

Federal Extensions  
Alabama  
Alabama PPT  
Alabama PTE-C  
Alaska  
Maine  
Massachusetts  
Massachusetts Composite

Michigan  
Michigan MBT  
Mississippi  
Mississippi Extensions  
Nebraska  
New York  
New York Estimate  
New York Extensions

New York Additional Extensions  
Oregon  
Oregon Composite  
Rhode Island  
Vermont  
Vermont Extensions

## Fiduciary

Federal Extensions  
Alabama  
Delaware  
Delaware Extensions

New Jersey  
New Jersey ESBT  
New Jersey Extensions  
Oregon

South Carolina  
Tennessee  
Tennessee Extensions  
West Virginia

## Exempt Organization

Florida

## Employee Benefit Plan

Form 5500  
Form 8955-SSA

# Product Updates

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## Partnership (1065) Product Updates

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### Federal

Form 1065, Schedule K, Line 18c has been updated to exclude the nondeductible 50% meals and entertainment expenses from rental properties that have the code S (State only code) entered in the FS field in Income/Deductions > Rent and Royalty worksheet > General section (Interview Form E-1, Box 36).

### Connecticut

CT-1065/CT-1120SI Line A return type explanation for final return will now produce.

### New York

New York Form TR-579-PT will no longer print ERO or Paid preparer's date when the option to print date signed by preparer/ERO has not been selected in Officer Manager > Configure Applications > Tax Preparation > *Office Group* > Signature Block.

Options have been added to New York > General Information > Printing Options > Suppress partners IT-204IP and Suppress partners IT-204-CP (Interview Form NY2, Boxes 30 and 34) to allow multiple entity types to be suppressed.

The preparer name will now print on Forms IT-204, IT-370-PF, and IT-204-LL when preparer name is entered in Office Manager > Configure Applications > Tax Preparation > *Office Group* > Signature Block or General > Return Options > Preparer Information - Overrides Officer Manager > Preparer name (Interview Form 3, Box 41) when the Print preparer signature is "No."

### New York Electronic Filing

Form IT-204-LL will now be transmitted to New York if there is a "&" in the legal name and upper case selected in either Officer Manager > Configure Applications > Tax Preparation > *Office Group* > Print Options > Print in upper case only or General > Return Options > Processing Options > Upper case (Interview Form 2, Box 63).

### Ohio

The current year depreciation deduction for the 2012 addback entered on the Ohio IT 1140 Passthrough Entity Tax Return worksheet > General Depreciation > General Depreciation Adjustment Information section > 5th Prior Year Add-back (Interview Form OH19) now calculates correctly.

### Oregon

Forms OR-TM and OR-LTD. When self-employment earnings are overridden, the partner information statement will now reflect the appropriate amounts. A diagnostic will issue if there is a discrepancy between the total on the form and the total on the statement due to the overrides.

### Texas

Worksheet view option for Electronic Funds Transfer will now display the option description.

# S Corporation (1120S) Product Updates

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## Oklahoma

Form 512-S, Oklahoma Small Business Corporation Income and Franchise Tax return, Page 8 registered agent's address now properly exports and produces in the electronic file with an entry on Oklahoma > Franchise Tax > 2. Franchise Tax Return Schedules B, C, and D > Registered agent address (Interview Form OK8, Box 33).

# Fiduciary (1041) Product Updates

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## Federal

Schedule D. AMT Schedule D, Line 19 statement reference no longer prints. The "Unrecaptured Section 1250 Gain Worksheet" prints instead of the statement when applicable.

## California Electronic Filing

Diagnostics 44596, 44923, 44929, 46804, & 46805 will not issue if the beneficiary's entity type is entered as a Trust and the Estate/Trust box will be selected on the CA 541 K-1.

## Kansas

The trust EIN will print on the Form K-18.

## Oklahoma

Letters and filing instructions will now reflect an Oklahoma due date of 4/16/2018 instead of 4/17/2018.