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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 2017.03000

Tax News

Caution. Taxpayers Sending Masked Documents to Taxing Authorities

A number of agencies have received estimate and payment vouchers with masked SSNs. To ensure payments are correct and processed in a timely manner, please advise taxpayers to submit the non-masked copies with their payments. Accountant and Taxpayer copies are masked. Only the Government copy includes the SSNs for tax filing.

Tax Updates

Individual

Form 1040-ES. The IRS has not released a final Form 1040-ES. The worksheet calculations were updated for known TY 2018 legislative changes and we have changed the vouchers to indicate 2018. The vouchers continue to reflect "E" for early forms in the lower right corner of the form, but are file-able.

Georgia Form 500 NOL. The Net Operating Loss Adjustment is available to elect the NOL carryforward.

Fiduciary

Final Form 1041-ES is available.

Update Pro Forma

Our Update Pro Forma feature is available:

- In Partnership to include Prior Year Tax from Wisconsin Form PW-1 for Wisconsin PW-U, Underpayment of Estimate Withholding Tax by Pass-Through Entities.
- In Fiduciary to include Prior Year Tax for Oregon Surplus (Kicker) Credit purposes.

Extender Legislation (Included with Release 2017.02070)

With the passage of the Bipartisan Budget Act of 2018 (Extenders), forms affected by the legislation need to be released by the IRS to replace the "Reserved for future use" line with the proper text. We are monitoring the release of these forms and associated schema updates closely, and will react as quickly as possible to release forms to production. Final Forms 1040, 1040A, 1040 Schedule A, and the 8917 Tuition and Fees Deduction were recently posted and were included on Release 2017.02070.

Electronic Filing Updates

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

Corporation

City of Detroit

S Corporation

City of Detroit

Product Updates

Individual (1040) Product Updates

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Federal

Form 2210. Section 1294 deferred tax is included in the amount of current year tax subject to penalty.

Kansas

Form 8960. Line 8 for Kansas will calculate the correct amount.

Michigan - Michigan Cities

Form CF 1040. The dependent information on Page 2 will print on one line instead of using word wrap.

Oregon

The Oregon surplus (kicker) credit is included in the return summary and client letters.

The special Oregon medical subtraction is limited by the 7.5% FAGI threshold when itemizing deductions on the Oregon return but not the federal return.

Pennsylvania

Schedule C. Line 13a will not show amortization when IRC Section "197" is present on the Schedule C Business worksheet > Depreciation and Amortization (Form 4562) Section > IRC Section field (DP-1, Box 117).

Form PA-40

- Nonemployee compensation will not double on PA-40, Line 1a. Line 1a should always equal the Schedule W2S, Column G Total.
- Line 13 should always equal the amount on the Schedule W2S > Part B > Column H Total.

Vermont

The Use Tax Worksheet will calculate a minimum use tax of \$5 when the AGI is less than \$10,000.

Partnership (1065) Product Updates

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Oregon

OR-TM letters and filing instructions will include electronic filing information.

Tennessee

The requested payment date entered on General > Basic Data > Direct Deposit/Electronic Funds Withdrawal > Withdrawal Date (Interview Form BNK-1, Box 41) applies the date to the electronic file.

The website in the transmittal letter and filing instructions reflects the correct address for online electronic payments.

Corporation (1120) Product Updates

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Federal

Book income (loss) includes the excluded portion of Section 277 carryover, when expenditures subject to the 90% test are used on Other Returns > Form 1120-H > 3-Deductions > Line 3 (Interview Form H-1, Box 101).

Form 3115. The statement reference for Line 26 will print in an appropriate location on the form.

New Hampshire

Form BET. The gross business receipts amount no longer includes rental income twice.

New York - New York City Electronic Filing

Diagnostic 43494 generates when a negative value is on NYC-2 Schedule C Part 1, Lines 7, 9, or 11.

The direct debit report will correctly reflect the due date of 3/15/18

Tennessee

The direct debit/deposit report applies the correct due dates for Tennessee estimated tax payments when the due date falls on a weekend.

S Corporation (1120S) Product Updates

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California

Form 3539. The Payment for Automatic Extension contains the amount requested separately per state override input, when the "X to produce all first state extensions" option is selected.

Colorado

Form DR 158-N will be produced when requested on Extensions > State / City Extension > Tentative Tax (Interview Form EXT-2 with an amount Box 62) and there is no balance due on the return.

Louisiana

Form CIFT-620. Page 3 will correctly print the preparer's name.

Mississippi

Form MS 84-125. Line 2 (Payroll Factor) will include Officers Compensation input for MS and Everywhere.

Montana

The field for the Montana Secretary of State ID has been lengthened to allow a total of 9 characters to be present.

Wisconsin

Schedule 5K-1. The Line 6h amount can be specially allocated when special allocation codes 53987 and 53988 are used.

Fiduciary (1041) Product Updates

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Pennsylvania

Schedules RK-1/NRK-1. The Federal identification number on top of the form is entirely masked when the option to mask is selected.

Estate and Gift (706/709) Product Updates

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New York

Late payment penalty and interest detail statements have been added to Form ET-706.