

2017.03020
Release Notes

March 25, 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 2017.03020

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 (Included with Release 2017.03010)

Federal. The IRS has released a final Form 1040-ES. We have updated our worksheet calculations as needed. We also updated the due dates for the first, third, and fourth vouchers on the OCR version of the form.

Electronic Filing Updates

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

Corporation - West Virginia Consolidated

Product Updates

Individual (1040) Product Updates

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Federal

Forms 6765 and 3800. A non-passive entity with a limitation on the current year credit will reflect the unused amount of the credit on the Form 3800 carryover report.

IRA Worksheet. Miscellaneous income attached to a Schedule C, Schedule F, or Schedule E entity is not used in calculating earned income for IRA Worksheet purposes.

Section 179 carryover is deleted from the depreciation detail report when the Section 179 input is deleted.

Summary 4562. Line 11 does not include the Schedule C income when the Schedule C is marked as no material participation.

The 4835 depreciation detail report prints in the government copy when applicable.

First Extensions

Stand-Alone Extensions. OHC RITA stand-alone extensions will print tax year 2018 on RITA Form 32-EXT, Section 3.

New York

Forms IT-214 and NYC-208 household income can be adjusted using a Federal AGI - adjustment.

Ohio

Extension letters indicate to mail the extension only if a voucher is present.

Ohio - Ohio Cities

RITA Form 37. When the resident city is the only city with Schedule J income, Worksheet L will produce. This will allow the total income on Worksheet L to flow through to Worksheet R to determine the total withholding that can appear on Page 2, Section B, Line 7b.

Partnership (1065) Product Updates

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Federal

Beginning and ending tax year dates will print on Form 8813 when the return is a fiscal year or short year return.

Iowa

Form 133. Line 6 calculates when Line 1 equals 0.

Kentucky - Kentucky Cities

The Lexington Form 228 ENP will generate and print when Form OL-S is in the return.

Maine

Schedule K-1 Equivalent. The Line 29 statement will correctly list amounts from Line 13 in the federal K-1.

Ohio

An option has been added to the federal Common State/City > Generic State Schedule K-1 Information worksheet > Generic State Partner Information Input > Detail section > State Use field (federal Interview Form ST-1, Box 120) which will allow the investor ownership percentage to be changed on the IT 1140, Schedule E, Investor Information and the IT 4708, Schedule VI, Investor Information.

Rhode Island

The due date for Single Member Limited Liability Companies (SMLLCs) will reflect March 15 when the single member is a passthrough entity.

Corporation (1120) Product Updates

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Illinois

A Diagnostic message is issued if the apportionment type box on Form IL-1120, Step 1, Line G is checked, but Line 23A is also checked indicating that the return has no apportionment.

Kansas

Federal statements are not included in the accountant and client copies of the Kansas return.

Massachusetts

A unitary financial group will automatically check "Financial Organization" on Forms 355U and U-MSI, if they include a financial elimination company.

New York City Electronic Filing

NYC-579-COR will pull ERO firm name on part A when entered.

Utah Electronic Filing

Diagnostic 56781 will no longer produce with a foreign preparer.

S Corporation (1120S) Product Updates

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Delaware

The Form 1100S due date has changed to the 15th day of the 3rd month.

Kentucky

The extension filing instructions for the nonresident withholding and composite returns will reflect the correct filing address.

Kentucky - Kentucky Cities

A copy of the federal return will print with the applicable Kentucky cities return.

Board of Education's Form OL-S. Line 13 will calculate correctly when an overpayment is present.

Maryland

Form 510C, Schedule A. Columns C and D will appear as zero when the ratio of nonresident partner income to total income is zero.

Mississippi

Extension Form 83-180 will populate amounts entered for tentative/franchise tax when the option to generate all state first extensions is selected.

Ohio

Section 179 will no longer be included in income for IT 1140 investors if there is an entry on Ohio > Other Composite > Form IT 4708 Shareholder Information section > Shareholder number.

Vermont Electronic Filing

Optional PDF attachments will process correctly.

Fiduciary (1041) Product Updates

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Federal

Schedule K-1. Complex returns with DNI less than accounting income will calculate the ordinary income percentage using DNI for foreign tax and state adjustments.

The resident letter will use the correct percentage for a Massachusetts resident.

The resident state letter for Massachusetts, New Jersey, or Pennsylvania will report taxable income if there are zero distributions at the federal level. If there are no entries for distributions (except in the case of a simple or final trust), no taxable income will be calculated for the state.

New Jersey

Tax-exempt dividends will flow to the New Jersey K-1 for grantor and custodial trusts.

New York

The IT-205 will mark the box for the paper check refund if an IT-205-C is in the return and a refund is required without any bank information in the return.

Estate and Gift (706/709) Product Updates

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Illinois

Form 700-EXT. Balance for which extension of time to pay is sought can be overridden using federal Extensions > Estate Tax Extension > Additional State Extension Information > Balance for which extension of time to pay is sought (Interview Form IL2, Box 49).