

2017.03050
Release Notes

May 20, 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)


Tax Updates

CCH® Global fx Tax integration with CCH® IntelliConnect® and CCH® AnswerConnect

Global fx Tax is being updated with this release to improve security and prepare for future CCH AnswerConnect integration.

Important changes to note are:

- The Office Manager path to configure CCH IntelliConnect authentication is changing to **Office Manager > Configure Applications > CCH Research**.
- The Office Manager research configuration dialog is being simplified to only include the IP address authentication option. The user ID authentication option is still available in Tax Preparation.
- The Tax Preparation path to configure IntelliConnect user ID authentication is changing to **Options > Interface Options > CCH Research**.
- Following the security changes, each of your staff will need to perform their initial log on for CCH IntelliConnect within each install and tax year of the software. Subsequent sessions will be automatically authenticated.

 **Important:** You will be prompted with the following "First Time" user dialog when you link to CCH IntelliConnect from within Global fx Tax for the first time after you install the 2017.03050 release. Once you have been authenticated, these credentials are preserved and you will be passed through on subsequent links using the same credentials.



Unable to automatically log you into CCH Research...

Click Continue to open the CCH Research login page. After a successful log in, the next time you launch CCH Research from Tax, you will be automatically logged in.

Continue

Username:
Enter your username

Password:
Enter your password

[Forgot Password?](#)

Remember my User ID and Password

Log In

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[Click here](#) for more information on CCH AnswerConnect.

Electronic Filing Updates

Corporation and S Corporation

Beginning with release 2017.03040, new electronic filing disqualifying diagnostics were added for Corporation and S Corporation returns with estimated tax payments for 2017 present in the returns. Entries are needed on Federal > General > Electronic Filing > Filing Security Information > Federal Estimated Payments > Date and Payment Method for First Payment and Final Payment (Interview Forms EF-4, Boxes 41, 42, 51 and 52) to clear the diagnostics. These changes were made to capture requested IRS data elements from the returns.

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

Partnership

Missouri - Kansas City

Corporation

Missouri - Kansas City

New York

- New York CT-33 Life Insurance Corporation Franchise Tax Return
- New York CT-33 NL, Non-Life Insurance Corporation Franchise Tax Return
- New York CT-33-C Captive Insurance Company Franchise Tax Return

S Corporation

Missouri - Kansas City


Fiduciary

Kentucky

Kentucky Extension

Electronic Filing Status System®

EFIN Manager. You will notice new transparency in EFIN Manager. Effective May 4, 2018, you may identify the most recent user who updated an existing EFIN or added a new EFIN via a new "Last Updated by" column in the *Edit EFIN* window. This information is also available on the main *EFIN Manager* page by simply hovering over the desired EFIN row.

 **Note:** This data is not available on EFIN additions or updates made prior to May 4, 2018.

Secondly, the *Account Number* selection format has changed from a list to a check box.

Filtering and Searching for Returns. The Return Type 7004F has been changed to "7004F/8868." Simply go to the *Select Columns* feature and add the "Category" column for visibility of an 8868 upload.

Product Updates

Individual (1040) Product Updates

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California

Form 3805P, Line 2 picks up exclusion amounts entered on IRS 1099-R.

Kentucky

Form 740EXT includes the reason for extension from Extensions > Additional State Information (Interview Form EXT-2, Box 35).

Maine

The Maine 1040ES is prepared regardless of the date of death for single filing status returns.

Massachusetts

Schedule X, Line 2, Taxable IRA/Keogh and Roth IRA conversion distributions worksheet begins with gross distribution amounts.

North Carolina

If the return is selected to be filed and signed by Executor or Administrator, the phone number will fill.

Oklahoma

If FC or XX is entered on Oklahoma > General > 1- Residency > 4. State of residence - taxpayer (OK9, Box 90), the input will no longer clear.

Pennsylvania

Form Schedule C depreciation schedule prints all assets when carrying to overflow.

Income from a New Jersey partnership will flow to Schedule G-L, Line 2f, Column B without making state use input for New Jersey pro rata share of income.

Rental income associated with an estate/trust no longer displays on Schedule G-L, Line 2h, Column B as it is already included in Line 2i, Column B.

Schedule A, Line 3 picks up special interest and bond premium when entered on the same occurrence of 1099-INT.

Pennsylvania - Pennsylvania Cities

Schedule F amounts will flow from Pennsylvania Schedule F to CLGS-32-1, Line 4 when home city has not been entered.

Tennessee Electronic Filing

Per the state, Tennessee account numbers must be entered as ten digits beginning on Tuesday, May 29th. Account numbers issued prior to May 29th that were nine digits in length must have a

leading zero added to comply with the new ten digit format. New account numbers will begin with “1” and not follow the previous format.

Partnership (1065) Product Updates

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Federal

Arizona assets coded as qualified Indian reservation property now calculate depreciation with the accelerated lives.

Corporation (1120) Product Updates

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Arizona

AZ Form 120, Page 1, Box 82F, use federal extension rather than AZ 120EXT, has been updated to be selected only when preparer requests it in data entry.

New York

Form CT-3, Part 4, Line 15 tax will no longer print when Line 14 is selected for new business that is eligible for exemption.

Fiduciary (1041) Product Updates

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Alabama

After the due date, the letters instruct to mail the return as soon as possible instead of the current date when no date to file the return is entered.

New York

The NY K-1 Equivalent will no longer report the IT-217 Farmer's School Tax Credit on Line 9.

Estate and Gift (706/709) Product Updates

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New York

Form ET-14 (3/18 version date) is updated for revisions posted by New York.

Exempt Organization (990) Product Updates

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New York

The New York CHAR500 has been updated to match the latest version published by the state. Updates are presentation only.