

CCH® ProSystem fx® Tax
2023.02030
Release Notes

January 28, 2024



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Contact and Support Information

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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 Release Notes

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CCH® ProSystem fx® 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/Recall, Organizer, technology enhancements)
- Updates made to Tax products (form additions and updates, diagnostic updates, changes caused by regulatory updates)

To access a list of CCH ProSystem fx Tax Release Notes for the current year and for prior years, visit the [Release Notes](#) page on our Customer Support site.

Highlights for Release 2023.02030

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Tax Updates

Partnership & S Corporation

Schedule K-1 Codes. Schedule K-1 codes have been added to the Federal entity based on preliminary instructions and are available to be implemented in the return. State reaction is still in process and should be reviewed before filing a return. Once the final instructions are received from the IRS, a review will be completed. Any additional codes and/or changes will be adjusted at that time. Please continue to monitor Software News and Release Notes for updates.

Electronic Filing Updates

Exempt Organization. On January 18th, the IRS provided [additional guidance](#) on the Form 990-T, Exempt Organization Business Income Tax Return, for prior and current year filing. An organization with a 990-T return due between January 15th and March 15th 2024 should file an automatic six-month extension of time. Any balance due must be submitted with the extension to avoid interest and penalties. Beginning March 17, 2024, preparers will be able to timely e-file Form 990-T for both prior and current tax year. Please see the IRS guidance for additional information.

Individual

FBAR Form 114	Kansas City Form 109	Oklahoma Estimates
Federal	Kansas City Form 109 Extension	Pennsylvania
Federal Extensions	Kentucky	Pennsylvania Estimates
Form 1040NR	Kentucky Estimates	Pennsylvania Extension
Alabama	Kentucky Extension	Philadelphia
Alabama PPT	Michigan	Philadelphia Form S-1
Arizona	New Jersey	Tennessee Form 170
Arizona Extension	New Jersey Estimates	Tennessee Estimates
Arizona Form 140-SBI	New Jersey Extension	Tennessee Extension Form 170
Arizona Form 140-SBI Extension	New York	Tennessee Form 183
Connecticut	New York Estimates	Utah
Connecticut Extension	New York Extension	Vermont
Idaho	New York Form 210	Vermont Estimates
Illinois	New York Form IT-204LL	Vermont Extension
Illinois Estimates	New York City Extension	Vermont Form HS-122
Indiana	New York City Form 1127	Virginia
Kansas	North Carolina	Virginia Extension
Kansas Estimates	North Carolina Estimates	Wisconsin
Kansas City Form 108	North Carolina Extension	Wisconsin Estimates
Kansas City Form 108 Extension	Oklahoma	

Corporation

Federal	Connecticut Extension	New York Additional Extension
Federal Estimates	Idaho	New York Estimates
Arizona	Illinois	New York Extension
Arkansas Extension	Kansas	New York Form IT-204LL
California	Kentucky Extension	North Carolina Extension
California Estimates	Maine	Tennessee Extension
California Form 199	Minnesota	Vermont Extension
Connecticut	Minnesota Estimates	Wisconsin
Connecticut Estimates	New York	Wisconsin Estimates

S Corporation

Federal	Kentucky Extension	Ohio
Federal Estimates	Minnesota	Ohio Composite
Arkansas	Minnesota Estimates	Ohio PTE
Arkansas Composite	New York	Pennsylvania
Arkansas PTE	New York Additional Extension	Pennsylvania Composite
California	New York Estimates	Pennsylvania Composite Extension
California Estimates	New York Extension	Pennsylvania Extension
California PTE	New York Form IT-204LL	Pennsylvania Form RCT-101
Idaho	North Carolina	Pennsylvania Form RCT-101 Extension
Illinois	North Carolina Extension	Tennessee Extension
Indiana	North Dakota	Vermont Extension
Kansas		

Partnership

Federal	Maine	Ohio
Arkansas Composite	Minnesota	Ohio Composite
Arkansas PTE	Minnesota Estimates	Ohio PTE
Idaho	New York	Pennsylvania Composite Extension
Illinois	New York Extension	Pennsylvania Extension
Indiana	New York Form IT-204LL	Tennessee Extension
Kansas	New York Form IT-204LL-DE	Vermont Extension
Kentucky Extension		

Fiduciary

Alabama	Maine Estimates	Massachusetts PPT Extension
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Connecticut
Connecticut Extension
Idaho
Maine

Massachusetts
Massachusetts Extension
Massachusetts Form MA 2G
Massachusetts Form PPT

Michigan
Oklahoma
Oklahoma Estimates

Exempt Organization

Federal Form 4720
Federal Form 990

Federal Form 990-EZ
Federal Form 990-N

Federal Form 990-PF
California Form CA 199

Tax Product Updates

S Corporation (1120S) Product Updates

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Federal

Form 1120S. Preparer telephone will print on Form 1120S, Page 1.

Partnership (1065) Product Updates

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Georgia

The withholding value within Forms 7-NRW and GA-K1 reflects as the total value of each partner's withholding value.

Indiana

Indiana Schedule PTET calculates resident pass through tax.