

CCH® ProSystem fx® Tax

2023.02040

Release Notes

February 4, 2024



Contact and Support Information	2
Information in Tax Release Notes	3
Highlights for Release 2023.02040	4
Tax Updates	4
Electronic Filing Updates	4
Tax Product Updates	8
Individual (1040) Product Updates	8
S Corporation (1120S) Product Updates	9
Partnership (1065) Product Updates	10
Fiduciary (1041) Product Updates	11

Contact and Support Information

[Return to Table of Contents.](#)

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

[Return to Table of Contents.](#)

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 2023.02040

Return to [Table of Contents](#).

Tax Updates

Batch Extensions

To print batch extensions, please see this [Knowledge Base article](#) and to electronically file batch extensions, please see this [KB article](#).

Individual

Washington. If a state authorization is being requested on a return where you have not requested Form 40 2452 Capital Gains Tax Return to be generated, please follow these steps:

1. Open Return.
2. Open General > Basic Data (Interview View Form 1).
3. Right Click and select Delete > Delete State.
4. Highlight “WA” and select “OK.”
5. On the screen that asks, “Are you sure you want to delete WA?” select “Yes.”
6. On the screen that says, “Deleted Unit WA” hit “OK.”
7. Recalculate the return. No state authorization should be requested.

Partnership

Wisconsin. Per the state’s request, Form 3-PV, Wisconsin Partnership Payment Voucher, should be generated via the [state website](#) if needed. The form in the software has been updated to indicate that it is not available to file.

G/L Bridge and G/L Direct

The import feature of G/L Bridge and G/L Direct for tax year 2023 is available with this release. The previously identified issues have been resolved.

Corporation, S Corporation, and Partnership

Schedule K-1 codes for passthrough input is in process and projected to be available on release 2023.02060, available on February 18th. Overrides are available to prepare the return until this input is available.

Electronic Filing Updates

Individual

California
California Estimates
California Extension

Minnesota
Minnesota Estimates
Minnesota Form M1PR

North Dakota
North Dakota Estimates
Ohio

California Form 568	Mississippi	Ohio Cities (Non-RITA)
California Form 568 Extension	Nebraska	Ohio Cities (RITA)
Kentucky Form 725	Nebraska Estimates	Ohio Form SD 100
Kentucky Form 725 Extension	New Hampshire	Oregon
Louisiana	New Hampshire Extension	South Carolina
Louisiana Extension	New Hampshire Form BT-Summary	South Carolina Extension
Massachusetts	New Hampshire Form BT-Summary Extension	West Virginia
Massachusetts Extension		

Corporation

Federal Consolidated	Multnomah Form C-2023 Extension	Oregon Consolidated
Arizona Consolidated	Multnomah Form CES	Pennsylvania
California Combined	Multnomah Form CES Extension	Pennsylvania Extension
Florida Extension	Multnomah Form METBIT Extension	South Carolina
Idaho Combined	Nebraska	South Carolina Consolidated
Illinois Consolidated	Nebraska Consolidated	Tennessee
Kansas City	New Hampshire	Tennessee Estimates
Kansas Consolidated	New Jersey Annual Report	Tennessee Form 174
Maine Consolidated	New York Combined	Tennessee Form 188
Maryland	New York Combined Extension	Utah
Maryland Extension	North Carolina	Utah Consolidated
Massachusetts Extension	Oklahoma	Virginia
Michigan Corporate Income Tax (CIT)	Oklahoma Consolidated	Virginia Consolidated
Minnesota Consolidated	Oregon	West Virginia
Mississippi	Oregon CAT	West Virginia Consolidated
Mississippi Consolidated	Oregon CAT Consolidated	Wisconsin Combined
Mississippi Extension		

S Corporation

Alabama Form PPT	Massachusetts Composite Extension	Oregon PTE
Arizona	Massachusetts Extension	South Carolina
Connecticut	Massachusetts PTE Extension	Tennessee
Connecticut Extension	Michigan Corporate Income Tax (CIT)	Tennessee Estimates
Florida	Mississippi	Tennessee Form 174
Florida Extension	Mississippi Extension	Tennessee Form 188

Iowa	Multnomah Form CES	Utah
Iowa Form 1120F	Multnomah Form CES Extension	Virginia
Iowa PTE	Multnomah Form METBIT Extension	Virginia PTE
Kansas City	Multnomah Form SC-2023 Extension	West Virginia
Kentucky	Nebraska	Wisconsin
Kentucky Extension	New Hampshire	Wisconsin Composite
Kentucky PTE	New Jersey Annual Report	Wisconsin Estimates
Kentucky Withholding Return	Oklahoma	Wisconsin Form 4
Maryland Form 510	Oregon	Wisconsin Form 4 Estimates
Maryland Form 510 Extension	Oregon CAT	Wisconsin PTE
Maryland Form 511	Oregon Composite	Wisconsin PTE Estimates
Maryland Form 511 Extension		

Partnership

Alabama Form PPT	Massachusetts PTE Extension	Oregon CAT
Arizona	Mississippi	Oregon Composite
Arkansas	Mississippi Extension	Oregon Form OR-LTD
California	Missouri	Oregon Form OR-TM
California PTE	Multnomah Form CES	Oregon PTE
California PTE Estimates	Multnomah Form CES Extension	Pennsylvania
Connecticut	Multnomah Form METBIT Extension	Pennsylvania Composite
Connecticut Extension	Multnomah Form P-2023 Extension	Pennsylvania Form PA-65
Delaware	Nebraska (2023.02030)	Philadelphia
Florida	New Hampshire	South Carolina
Florida Extension	New Hampshire Form DP-10	Tennessee
Iowa	New Jersey	Tennessee Estimates
Iowa PTE	New Jersey Estimates	Tennessee Form 174
Kansas City	New Jersey Extension	Tennessee Form 188
Kentucky	New Jersey Form CBT	Utah
Kentucky PTE	New Jersey Form CBT Extension	Virginia
Kentucky Withholding Return	New Jersey PTE	Virginia PTE
Maryland Form 510	New Jersey PTE Estimates	West Virginia
Maryland Form 510 Extension	New Jersey PTE Extension	Wisconsin
Maryland Form 511	Oklahoma	Wisconsin Composite
Maryland Form 511 Extension	Oregon	Wisconsin PTE
Massachusetts Composite Extension		

Fiduciary

District of Columbia

District of Columbia Extension

Iowa

Iowa PTE Return

Louisiana

Louisiana Extension

Montana

West Virginia

Tax Product Updates

Individual (1040) Product Updates

Return to [Table of Contents](#).

Minnesota

Minnesota Schedules M1DQC and M1CWFC calculate when Earned Income is not present or negative, per communication with Minnesota Department of Revenue.

S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

Iowa

Iowa Form 1120F, Schedule A, Line 2 calculates the correct amount when information to indicate a financial institution for Schedule A is present. Overrides are available in Iowa > Other Returns > Financial Return > Schedule A - Additions Line 16 (Interview Form IA7, Box 53).

Kansas

When a foreign address is entered for the return, it displays on all relevant forms and vouchers.

New York

Refunds resulting from the overpayment of PTE taxes are automatically reported on Form CT-225, New York State Modifications.

Partnership (1065) Product Updates

Return to [Table of Contents](#).

Federal

Schedule K-1, Line 10. Allocations of passthrough amounts with activity numbers present will properly pull the Section 1231 amount when an amount is also present under Section 199 and is being specially allocated.

Alabama

Form PTE-CK1, Column E equals the total of Schedule K-1, Lines G, H, I, J, K, L, and M. This can be adjusted using Alabama > Composite Return > Nonresident Composite Payment Return > Alabama source income - override (Interview Form AL4, Box 31).

Kentucky Cities

Warren county schools' address has been updated.

Maine

Estimate codes from other states do not move to Interview Form ME4, Box 30 after selecting Options > Reset Input. If the Estimate code is currently in Interview Form ME4, Box 30, delete Interview Form ME4 using Edit > Delete > Delete Sheet and recalculate. Use Edit > Delete > Delete State and select the ME unit to delete. Then input the Estimate code on the appropriate state's Interview Form and recalculate.

New Jersey

New Jersey > Other > Tiered Partnerships (Schedule A) > Schedules NJK-1 Received from Other Partnerships grid is now accessible in Worksheet View.

Ohio

Filing instructions now show the correct direct debit amount for the IT 1140 when the IT 1140 and IT 4708 are both filed in the same return.

Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

Federal Electronic Filing

Form 1041. Diagnostic 49179 will no longer issue when 1041, Line 21 is \$4,700 or less and the return type is a qualified disability trust.