

Release Q1 2024  
March 2024

## CCH SureTax<sup>®</sup>

### Welcome to CCH SureTax Q1 2024 Release!

This bulletin provides important information about the Q1 2024 release of CCH SureTax. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

### New in this Release

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#### **Automated Prepayment Solution - newly added Import Template**

SureTax Returns is proud to announce additions to the new automated prepayment solution. The automated prepayment solution provides users the ability to set-up their prepayment requirements in SureTax and have the application handle the calculation and reporting. Users are also now able to import and export their prepayment set-up. This allows users to minimize time spent during the initial set-up. Any prior period data in SureTax can be used to calculate prepayment amounts, which reduces the need to review historical returns to obtain prior period tax liability information. Validations are in place to guide users on calculation methods and percentage requirements by each applicable state's Department of Revenue (DOR) to remain compliant. Returns are automatically populated based upon the prepayment set-up, so users won't have the additional step of editing the return to include the prepayment amount. The automated prepayment solution has streamlined the calculation and reporting and minimized time spent and risk associated with the prepayment process.

You can find additional information on prepayments and returns under SureTax Help. When in SureTax, click on the profile button in the top-right and select 'Help'. In the tool bar, click on 'Returns', then 'Automated Prepayment Solution Guide'. You can also reach out to your Support Representative for additional information.

#### **Automated Filing for Michigan Monthly/Quarterly and Annual Sales Tax Returns**

The Michigan Department of Revenue (MI DOR) offers electronic data interchange (EDI) filing for the 5080 (monthly/quarterly form) and the 5081 (annual return). EDI is the transmission of an electronic document, or file, from server-to-server. This filing method is now available in SureTax Returns for the MI state-level sales tax forms.

To take advantage of this filing method in Returns, update the Tax Authority Relationship for the desired MI tax return to 'EDI'. You will be required to have a Bank Account set-up in SureTax and associated with the relationship. When the return is ready to file, the return status must be updated to 'Reconciled' to select 'File & Pay' and transmit the return. SureTax will receive an acknowledgement from the DOR that the return has been received and initially accepted. This acknowledgement can be downloaded.

#### **Marketplace Facilitators Reporting**

Marketplace Sellers who need to report their sales made through a Marketplace Facilitator as a deduction can now pass an exempt reason code (43) in their data to flag these transactions as such. Tax Forms have been updated to reflect the various reporting requirements.

**Service Provider Documentation**

Help documentation for the Service Provider Dashboard has been added to the SureTax help database.

**Product Group / Product Item**

Product Group / Product Item can now be used in the transactions, overrides, and exemptions areas. Additionally, Product Group / Product Item is now supported in the imports area.