Wolters Kluwer

Release Notes

Release Q4 2023
December 2023

CCH SureTax®

Welcome to CCH SureTax Q4 2023 Release Notes!

This bulletin provides important information about the Q4 2023 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

Automated Prepayment Solution
Returns is proud to announce the new automated prepayment solution. Users will be able to set-up their prepayment requirements in SureTax and have the application handle the calculation and reporting. 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 process and minimized time spent and risk associated with the prepayment process.

Reach out to your Sales Rep to discuss how to become an early adopter.

Automated Filing for California Monthly and Quarterly Sales Tax Returns
The California Department of Revenue (CA DOR) offers electronic document interchange (EDI) filing for the CDTFA-1150 (monthly prepayment form) and the CDTFA-401A (quarterly return). EDI is the transmission of an electronic document, or file, from server-to-server. This filing method is now available in Returns.

To take advantage of this filing method in Returns, update the Tax Authority Relationship for the desired CA tax return to 'EDI'. When the return is ready to file, the return status must be updated to 'Reconciled' to select 'File & Pay' and transmit the return.

Streamlining Roles

- In this release, we have decommissioned certain roles within our system to streamline and enhance the user experience. If you were using a decommissioned role, your role has been updated to a custom role. No action is needed from your end.

Product Group/Product Item (PGPI) description available under transaction details

- We have added the ability for users to view the description of Product Group/Product Item under the transaction detail screen. Any transactions run using Product Group/Product Item will now have the description available for review under the transactions area of SureTax.