



Contact and Support Information .....	2
Information in Tax Year 2015 Release Notes .....	3
<b>Highlights for Release 2015.02000</b> .....	<b>3</b>
Protecting Americans from Tax Hikes Act of 2015 .....	3
New Diagnostic .....	3
Electronic Filing .....	3
Tax Product Enhancements in Release 2015.01000 .....	4
<b>Tax Product Enhancements 2015.01000 - Worksheet View</b> .....	<b>5</b>
Individual (1040) Product Enhancements - Worksheet View .....	5
Partnership (1065) Product Enhancements - Worksheet View .....	11
Corporation (1120) Product Enhancements - Worksheet View .....	14
S Corporation (1120S) Product Enhancements - Worksheet View .....	17
Fiduciary (1041) Product Enhancements - Worksheet View .....	20
Exempt Organization (990) Product Enhancements - Worksheet View .....	23
Estate and Gift (706/709) Product Enhancements - Worksheet View .....	24
Employee Benefit Plan (5500) Product Enhancements - Worksheet View .....	25
<b>Tax Product Enhancements 2015.01000 - Interview View</b> .....	<b>26</b>
Individual (1040) Product Enhancements - Interview View .....	26
Partnership (1065) Product Enhancements - Interview View .....	32
Corporation (1120) Product Enhancements - Interview View .....	35
S Corporation (1120S) Product Enhancements - Interview View .....	38
Fiduciary (1041) Product Enhancements - Interview View .....	41
Employee Benefit Plan (5500) Product Enhancements - Interview View .....	44
Exempt Organization (990) Product Enhancements - Interview View .....	45
Estate and Gift (706/709) Product Enhancements - Interview View .....	46

## Contact and Support Information

Product and account information can be accessed by visiting Customer Support online at [Support.CCH.com](http://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 Web site 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 Support calendars, as well as options to enter Web tickets for assistance.

## Information in Tax Year 2015 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, Organizer, technology enhancements)
- Updates made to Tax products (form additions and updates, diagnostic updates, changes caused by regulatory updates)

## Highlights for Release 2015.02000

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### Protecting Americans from Tax Hikes Act of 2015

On Friday, December 18, 2015, the Protecting Americans from Tax Hikes (PATH), commonly known as “Tax Extenders,” was signed into law. Forms affected by PATH are still under review by the IRS, and CCH will continue to use draft versions of these forms until the IRS releases final forms. The IRS has not given any time frame for updating the affected forms, but we are monitoring their actions closely and will release forms as they are finalized. Until then, the affected forms will continue to have the “Reserved” fields on them.

### New Diagnostic

New for Release 2015.02000 will be an updated diagnostic that will display whenever a Reserved field is used. Affected forms are on the list below:

1040	5695	8835	8900
1040A	6478	8844	8908
1040NR	6765	8845	8911
4136	8689	8864	1040 Schedule A

### Electronic Filing

The IRS announced that electronic filing for Business returns (Partnership, Corporation, S Corporation, Fiduciary and Exempt Organization) opens on Saturday, January 9, 2016, and Individual returns open on Tuesday, January 19, 2016.

Electronic filing of CCH ProSystem *fx* returns will be available for federal and certain states on Release 2015.02010, scheduled for Sunday, January 10, 2016.

# Tax Product Enhancements in Release 2015.01000

Click one of the links below to read about the tax application enhancements included with Release 2015.01000.

## Worksheet View

- [Individual \(1040\) Product Enhancements - Worksheet View](#)
- [Partnership \(1065\) Product Enhancements - Worksheet View](#)
- [Corporation \(1120\) Product Enhancements - Worksheet View](#)
- [S Corporation \(1120S\) Product Enhancements - Worksheet View](#)
- [Fiduciary \(1041\) Product Enhancements - Worksheet View](#)
- [Employee Benefit Plan \(5500\) Product Enhancements - Worksheet View](#)
- [Exempt Organization \(990\) Product Enhancements - Worksheet View](#)
- [Estate and Gift \(706/709\) Product Enhancements - Worksheet View](#)

## Interview View

- [Individual \(1040\) Product Enhancements - Interview View](#)
- [Partnership \(1065\) Product Enhancements - Interview View](#)
- [Corporation \(1120\) Product Enhancements - Interview View](#)
- [S Corporation \(1120S\) Product Enhancements - Interview View](#)
- [Fiduciary \(1041\) Product Enhancements - Interview View](#)
- [Employee Benefit Plan \(5500\) Product Enhancements - Interview View](#)
- [Exempt Organization \(990\) Product Enhancements - Interview View](#)
- [Estate and Gift \(706/709\) Product Enhancements - Interview View](#)

# Tax Product Enhancements 2015.01000 - Worksheet View

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## Individual (1040) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

### Federal

#### Banking

- Entries of “blank/blank” or “S/blank” in the FS/State fields now carry to all states in the return.
- Added Office Manager option to not pro forma bank account information.
- Added a new confirmation question to Organizer.
- Added a summary grid that displays all bank accounts entered.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

#### Depreciation (1040/1120/1120S/1065/1041)

- New option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.
- An export only field was added for calculated current year depreciation.

#### New Forms

- Form 4852, Substitute for Form W-2, Wage and Tax Statement.
- Expecting from IRS: Form 8885, Health Coverage Tax Credit.
- Expecting from IRS: Form 8965 Shared Responsibility Worksheet.
- Expecting from IRS: Form 8965 Worksheet B.

#### New Input

IRS 1099-QA, Distributions from ABLE accounts.

#### New Options

- New Pro Forma Option - Suppress Wages - W-2 Wages > Wages.
- New Pro Forma Option - Suppress Wages - Expatriate Wages and Salaries > Other.

#### New Drill Downs

- Form 1040, Line 9a
- Form 1040, Line 18
- Schedule A, Line 5
- Schedule B
- Schedule C, Lines 1, 10, 11, 15, 16a, 21, 22,24a, 25 and 26

- Schedule F, Lines 12, 21a, 21b and 29

## New Letters and Filing Instructions

- 1040-C
- Form 3520-A
- Form 3520
- Form 8802
- Added a sentence with the last 4 digits of the bank account number.

## Miscellaneous

Mark-to-Market Election for multiple blocks of stock for Form 8621.

## TEQ

- Hypothetical Form 1040: Option added to exclude state refunds. Income/Deductions > Other Income > Refunds of State and Local Income Taxes - Detail > Exclude from hypothetical calculation.
- Hypothetical Form 1040: Option added to suppress hypothetical lines 64 through 68. Tax Equalization > Tax Equalization > Federal Calculation Options > Suppress hypothetical Form 1040, line 64 through 68 and Tax Equalization > Tax Equalization Engagement > Federal Calculation Options > Suppress hypothetical Form 1040, lines 64 through 68.
- Hypothetical Form 1116: Added ability to include foreign tax payments in hypo calc. Credits > Foreign Tax Credit > Part II - Foreign Taxes paid or Accrued > Hypo.
- Hypothetical Form 1116: Added ability to include prior year foreign tax payments in hypo calc. Credits > Foreign Tax Credit > Prior Year taxes Paid in the Current Year > Hypo.
- Hypothetical Form 1116: Added ability to enter hypothetical FTC carryovers. Credits > Foreign Tax Credit > Part III - Carryovers - Computation of Foreign Tax Credit > Tax Equalization Carryovers (these amounts will pro forma). Also added for AMT.
- Hypothetical Form 2555: Added ability to include foreign travel period in hypo calc. Foreign > Travel Abroad > Include in hypo calc.
- Hypothetical Form 2555: Added ability to have a hypothetical tax home history different from actual return. Foreign > 2555-Foreign Earned Income Exclusion > General > Tax Equalization Tax Home History (if Different).
- Hypothetical Form 2555: Added ability to enter different bona fide residence dates for hypothetical purposes. Foreign > 2555-Foreign Earned Income Exclusion > Bona Fide Residence Test > Tax equalization date (if different) - beginning & ending.
- Hypothetical Form 2555: Added ability to enter different physical presence test dates for hypothetical purposes. Foreign > 2555-Foreign Earned Income Exclusion > Physical Presence Test > Tax Equalization Twelve-Month Qualifying period (if different) - Override - beginning & ending.
- Hypothetical Form 2555: Added ability to enter hypothetical qualified housing expenses. Foreign > 2555-Foreign Earned Income Exclusion > Qualified Housing Expenses > Tax equalization qualified housing expenses (if different).
- Hypothetical Form 2555: Added ability to select a different optimization code for hypo calc. Tax Equalization > Tax Equalization > Federal Calculation Options > Hypothetical optimization code (if different) - Taxpayer & Spouse and Tax Equalization > Tax Equalization Engagement > Federal Calculation Options > Hypothetical optimization code (if different) - Taxpayer & Spouse .

- Cash Flow & Reconciliation write-in amounts: Changed descriptions to be more intuitive. Program functionality did not change. Code 1 Addition to Tax changed to Other Employee Payments. Code 2 Reduction from Tax changed to Other Hypothetical Taxes. Code 3 Other Payments changed to Other Company Payments.
- Hypothetical FICA/Medicare: Added ability to separately include wages in the FICA/Medicare calculation. This option applies at the entity level. Foreign > Expatriate Wages > Include in hypo FICA/Medicare - Y/N (Y is default) and Income/Deductions > Wages, Salaries and Tips > Detail > Other > Fed - include in hypothetical FICA/Medicare calculation - Y/N (Y is default).
- Cash Flow summaries: Government-to-worksheet links expanded.
- Hypothetical NYC/Yonkers/MCTMT - adjustment & override. Tax Equalization > State Line Adjustments, Options and Overrides > New York City, Yonkers and MCTMT Adjustments/Overrides.
- Hypothetical Credit for taxes paid other states - adjustment & override. Tax Equalization > State Line Adjustments, Options and Overrides > Credit for taxes paid other states.
- Hypothetical Sch B Interest - shows only those items included in the hypothetical calculation. Overflows to form.
- Hypothetical Sch B Dividends - shows only those items included in the hypothetical calculation. Overflows to form.

### Other Foreign

- Expatriate: Allocation of Compensation worksheet. Option added to print only those compensation items that are in the return. Overflow items print on another form rather than continuation statements. Foreign > Expatriate Information > Allocation of Compensation > Print Allocation of Compensation #2 worksheet.
- Generic treaty treatment - Will add field listing countries that are not yet supported with a treaty calculation. When a country is entered, interest, dividends & wages will be resourced as foreign source.

## States

### Alabama

- Non/PY Resident State Override functionality added for part-year residents.
- Added Schedule AJA, Alabama Jobs Act - Investment Credit.
- Added Schedule DEC, Career Technical Dual Enrollment Credit.
- Added Schedule HTC, Historic Tax Rehabilitation Credit.

### Arizona

Added credit Form 338, Credit for Investment in Qualified Small Business, for paper and electronic filing.

### Arkansas

Added Form AR-RET, Retirement Exclusion Worksheet.

### California

- State withholding from K-1s will now be picked up for electronic filing purposes. You no longer have to move the withholding to IRS-1099MISC in order to electronically file. Diagnostic 41291 will no longer issue in this situation.

- NONE or 99-9999999 can now be used for a foreign employer ID on foreign W-2s for California electronic filing. Diagnostic 45575 will no longer issue in this situation.
- Form 3554, New Employment Credit can now have multiples of the form.
- Added Form 3514, EIC Tax Worksheet.
- Added Form 3592, College Access Tax Credit.
- Added Form 3531, California Competes Tax Credit.

## Connecticut

Added option to e-file estimate payments.

## District of Columbia

Installation of new EIC / Earned Income worksheet.

## Idaho

Added Form 75B, Fuels Use Report for Fuel Bought after 1/1/15.

## Illinois

- Web Pay paragraph option was added (should automatically generate if conditions are met or can be forced on IL General > Residency > Web pay paragraph code.)
- Added IL to Code 19 on 1099R to exclude from pension treatment (not create a subtraction).
- Added option to e-file estimate payments.

## Indiana

Added enum table for ISO code e-file requirements.

## Iowa

- Iowa Income / Deductions > Federal Tax Data Section is replacing Iowa Income / Deductions > Additions and Subtractions Sections to allow all prior and current year federal tax, payment and credit amounts to be used in the calculation.
- Added option to e-file estimate payments.

## Kansas

- Itemized deductions for Kansas will include 50% of real estate taxes, personal property taxes and qualified residence mortgage interest plus 100% of charitable contributions.
- Partnership guaranteed payments will be added to Kansas AGI (they were previously excluded from Kansas AGI along with all other business income).
- Gain(s) from sales of Christmas trees from Christmas tree farms will be subtracted from Kansas AGI.
- Income threshold for Form K40-H increases to \$34,000.
- Income threshold for Form K40-PT increases to \$19,100.
- Added option to e-file estimate payments.

## Kentucky

Added option to e-file estimate payments.



## Kentucky - Kentucky Cities

- Added Form OL-S, Occupational License Fee Return:
  - ◆ This generic version replaces prior OL-3, 228, 228S.
  - ◆ Allows us to expand our KYC offerings beyond Lexington and Louisville in future years.

## Louisiana

- Added Form R-540-G1, Credit for Taxes Paid to Other States.
- Added Form R-540CRW, Refundable Credits Reduction.
- Added Form R-540CNR, Nonrefundable Credits Reduction.

## Maine

Added option to e-file estimate payments.

## Maryland

Autogenerate PDFs for Forms 502TP and 500DM.

## Massachusetts

Added diagnostic regarding MA IRA income basis.

## Michigan - Michigan Cities

- Added Detroit e-file.
- Added Form 5118, Detroit Resident Income Tax Return.
- Added Form 5119, Detroit Nonresident Income Tax Return.
- Added Form CF-8879, Generic eFile Signature Authorization.

## Minnesota

- Added option to e-file estimate payments.
- Added MN Property Tax Filing Instructions.

## Nebraska

Added option to e-file estimate payments.

## New Mexico

Added RPD-41083, Affidavit to Obtain Refund Due a Deceased Taxpayer.

## New York

- Re-added 2D barcode.
- Added Form IT-114, Claim for Family Tax Relief Credit.
- Added Form IT-2, Summary of W-2 Statements.
- Added Form IT-639, Minimum Wage Reimbursement Credit.
- added IT-611, IT-611.1 and IT-612, forms related to claims for Brownfield Redevelopment Tax Credit.

- Added Form IT-370 (EXT), Application for Six Month Extension.
- Added TEQ for NYC and Yonkers.

## North Carolina

Added option to e-file estimate payments.

## North Dakota

Added option to e-file estimate payments.

## Ohio

- Now mandating 2D barcode.
- Added Form 40-XP, Income Tax Payment Voucher (Amended).
- Added Form SD 40-XP, School District Income Tax Payment Voucher (Amended).

## Oregon

Added Form OR Sch OR-D, Charitable Checkoff Donations.

## Pennsylvania

- Added Form W-2 RW, W-2 Reconciliation Worksheet.
- Added option to e-file estimate payments.
- Added electronically filed extensions for both TP & SP separately or combined.
- All K-1 company information including telephone number, etc. now pro forma from year to year.

## Pennsylvania - Philadelphia

Moved Worksheet View electronic filing input to FD Electronic filing worksheet > City section.

## Virginia

- Added statement for 65 and older income based deduction for part-year residents.
- Added Form 760-PFF, Payment Coupon for Farmers, Fishermen and Merchant Seamen.

## West Virginia

Added new Schedule DP, Schedule of Additional Dependents.

## Wisconsin

- Added new Schedule AR, Explanation of Amended Return.
- Added option to e-file estimate payments.

# Partnership (1065) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Added a summary grid that displays all bank accounts entered.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### Depreciation (1040/1120/1120S/1065/1041)

Added a new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

### Partner Information

- Added a summary grid for state specific partner information for the following states:
  - ◆ CA, CT, DE, GA, IN, KS, KY, MI, MN, MS, MT, NE, NJ, NM, ND, OH, OHC, OK, OR, PA, SC, VA, WI

### New Options

Added new Pro Forma option in Office Manager - the ability to pro forma estimate payment amounts is now available.

### New Drill Downs

- Form 1065, Schedule K, Line 11
- Form 1065, Schedule K, Line 13d
- Form 1065, Schedule K, Line 14c
- Form 1065, Schedule K, Line 16l
- Form 1065, Schedule K, Line 17b
- Form 1065, Schedule K, Line 17c
- Form 1065, Schedule K, Line 17f
- Form 1065, Schedule M-1, Line 1

### New Letters/Filing Instructions

Added a sentence with the last 4 digits of the bank account number.

### Miscellaneous

- Added Mark-to-Market Election for multiple blocks of stock for Form 8621.
- State Use help screens now include detail in the federal level help screen.
- Form 8878-A, IRS e-file Electronic Funds Withdrawal Authorization for Form 7004 now included in the Extension print package.

- A new summary worksheet grid has been added for 8621 to allow PFIC related information on that grid to be imported through Microsoft® Excel®.
- Form 8621 Part V, excess distribution calculation for lines 15a through 15e will now allow multiple holding period end dates for each block of shares.
- Added a new option on Worksheet Credits > 8586 and 8609 - Low-Income Housing Credit > Annual Statement for Low-Income Housing Credit for Form 8609-A presentation of deferred 1st year credit in the 11th year.
- New option added to “Compute 11th year credit” on Worksheet Credits > Form 8586 and 8609 Low income Housing Credit > Annual Statement for Low-Income Housing Credit.

## States

### Alabama

Added Schedule PC, Passthrough Credits.

### California

- Added new Form 3592, College Access Tax Credit.
- Added new Form 3531, California Competes Tax Credit.

### Connecticut

- PDFs added to electronically filed extensions.
- Batch extensions available for electronically filed returns.

### Idaho

Added Form 75, Fiscal Year Fuels Use Report.

### Illinois

- Now includes withholding from Form EF K-1-P on the return.
- Added Form 8879-IL signature forms.

### Indiana

Added electronic filing.

### Iowa

Added Form IA 133, Iowa New Jobs Tax Credit.

### Kentucky

Added electronic filing.

### Kentucky - Kentucky Cities

- Added Form OL-S, Occupational License Fee Return:
  - ◆ This generic version replaces prior OL-3, 228.
  - ◆ Allows us to expand our KYC offerings beyond Lexington and Louisville in future years.

## Louisiana

- Added Form R-620CNR, Nonrefundable Credit Reduction Worksheet (2014 and 2015).
- Added Form R-620CRW, Refundable Credit Reduction Worksheet (2014 and 2015).

## Maine

Added Form 901ES-ME EXT, Pass-Through Entity Withholding Extension Payment Voucher.

## New Mexico

Added electronic filing for Form PTW-D, Annual Withholding of Net Income From a Pass-Through Entity Detail Report.

## New York

- Added ability to self-prepare for electronic filing of Form IT-204 and Form 204-LL.
- Added IT-611, IT-611.1 and IT-612, forms related to claims for Brownfield Redevelopment Tax Credit.
- Added Form IT-203-GR-ATT-C, Schedule C, Nonresident partners qualifying and participating in a metropolitan commuter transportation mobility tax (MCTMT).
- Added Form TR-99, Application for Permission To File a Group Return.

## North Carolina

- Added electronic filing.
- Added the ability to create multiple additional LLC Annual Reports.

## Oregon

Added electronic filing.

## Rhode Island

Business Franchise Tax has been eliminated.

## Vermont

Added electronic filing (2014 and 2015).

## West Virginia

Business Franchise Tax has been eliminated.

## Wisconsin

Added electronic filing for estimate payments.

# Corporation (1120) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Added a summary grid that displays all bank accounts entered.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### Depreciation (1040/1120/1120S/1065/1041)

Added a new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

### New Input

- New Office Manager option to complete Schedule M-3, Part I and prepare Schedule M-1.
- States that previously used state coded entries on passthrough input now can use the existing state column.

### New Drill Downs

- Form 1120, Page 1, line 29a - NOL
- Form 4626, Line 6 - AMT NOL
- Schedule M-3, Part II, lines 23a through 23g

### Miscellaneous

- A new summary worksheet grid has been added for 8621 to allow PFIC related information.
- Added Mark-to-Market Election for multiple blocks of stock for Form 8621.
- 8621 part V, excess distribution calculation for lines 15a through 15e will now allow multiple holding period end dates for each block of shares.
- State Use help screens now include detail in the federal level help screen.
- Form 8878-A, IRS e-file Electronic Funds Withdrawal Authorization for Form 7004 now included in the Extension print package.
- Late payment and late interest are now included in total balance due on the bottom of Form 1120, Page 1.
- New print options for QPAI Workpaper on Worksheet Federal > Income/Deductions > Domestic Production Activity Deduction > Other Information > General.
- New option on Worksheet Federal > General > Return Options > Processing Options to include Form 5471 - Schedule I - Summary of Shareholder's Income from Foreign Corporations (line 6) on Form 1120, Schedule C - "Income from controlled foreign corporations under subpart F" (line 14).
- New option on Worksheet Federal > Foreign > 5471 > Foreign Corporation Worksheet > Miscellaneous Information - 1120 only to include Form 5471, Schedule I - Summary of Shareholder's Income from Foreign Corporations (line 6) on Form 1118.

- Small corporation exemption now prints on top of Form 4626, when applicable.
- Added Sale of Assets Summary to consolidated returns.
- Added Consolidated Depreciation Differences worksheet for consolidated returns.
- Added input to allow an override of shareholder information at the consolidated level on Worksheet Foreign > Form 5472 - Information Return of a 25% Foreign-Owned U.S. Corporation > Direct 25% Foreign Shareholder and the Ultimate Indirect 25% Foreign Shareholder.
- Added a new option on Worksheet Federal > Credits > 8586 and 8609 - Low-Income Housing Credit > Annual Statement for Low-Income Housing Credit for Form 8609-A presentation of deferred 1st year credit in the 11th year.
- New option added to “Compute 11th year credit” on Worksheet Credits > Form 8586 and 8609 Low income Housing Credit > Annual Statement for Low-Income Housing Credit.

## Letters/Filing Instructions

Add a sentence with the last 4 digits of the bank account number.

## States

### Alabama

Added Schedule EC, Excise Credits.

### California

- Added electronic filing for Form 199, California Exempt Organization Annual Information Return.
- Added Form 3531, California Competes Credit.
- Added Form 3592, College Access Tax Credit.

### Connecticut

- Add electronic filing for estimates.
- PDFs added to electronically filed extensions.
- Batch extensions available for electronically filed returns.

### Idaho

Added Form 75, Fiscal Year Fuels Use Report.

### Illinois

- Now includes withholding from Form EF K-1-P on the return.
- Added Form 8879-IL signature forms.

### Iowa

- Added Schedule L, Iowa Nexus Adjustments.
- Added Form IA 133, Iowa New Jobs Tax Credit.

## Louisiana

- Added Form R-620GIW, Reduction in Exclusions and Deductions Worksheet (2014 and 2015).
- Added Form R-620CNR, Nonrefundable Credit Reduction Worksheet (2014 and 2015).
- Added Form R-620CRW, Refundable Credit Reduction Worksheet (2014 and 2015).

## Massachusetts

- Added Allotment CHDC, Certified Housing Development Credit.
- Added Individual Certificate CHDC, Certified Housing Development Credit.
- Added Transfer/Sale CHDC, Certified Housing Development Credit Certificate.

## Michigan - Michigan Cities

Added Detroit D-1120(Ext), City of Detroit Corporate Income Tax - Extension Request.

## New Jersey

- Added electronic filing for estimates.
- Added electronic filing for extensions.
- Added electronic filing for annual reports.

## New York

New York is being updated to reflect major legislative changes for 2015.

## New York - New York City

New York City Corporation is being updated to reflect major legislative changes for 2015.

## North Carolina

- Added the ability to create multiple additional LLC Annual Reports.
- Added D-403 Schedule K-1 for e-file use.
- Added electronic filing (2014 and 2015).

## Rhode Island

Business Franchise Tax has been eliminated.

## Vermont

Added electronic filing (2014 and 2015).

## West Virginia

Business Franchise Tax has been eliminated.

## Wisconsin

Added electronic filing for estimate payments.



# S Corporation (1120S) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Added a summary grid that displays all bank accounts entered.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### Depreciation (1040/1120/1120S/1065/1041)

Added new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

### Shareholder Information

- Added a summary grid for shareholder specific information for the following states:
  - ◆ KS, KY, NJ, NY, SC, VA

### New Input

States that previously used state coded entries on passthrough input now can use the existing state column.

### New Drill Downs

- Form 1120S, Page 1, Lines 22a, 22b, 23b and 23c
- Form 1120S, Schedule D, Lines 4, 5, 6, 11, 12 and 14

### New Letters/Filing Instructions

Added a sentence with the last 4 digits of the bank account number.

### Miscellaneous

- Added Mark-to-Market Election for multiple blocks of stock for Form 8621.
- State Use help screens now include detail in the federal level help screen.
- Form 8878-A, IRS e-file Electronic Funds Withdrawal Authorization for Form 7004 now included in the Extension print package.
- Form 8621 part V, excess distribution calculation for lines 15a through 15e will now allow multiple holding period end dates for each block of shares.
- A new summary worksheet grid has been added for 8621 to allow PFIC related information.
- Added a new option on Worksheet Federal > Credits > 8586 and 8609 - Low-Income Housing Credit > Annual Statement for Low-Income Housing Credit for Form 8609-A presentation of deferred 1st year credit in the 11th year.
- New option added to "Compute 11th year credit" on Worksheet Credits > Form 8586 and 8609 Low income Housing Credit > Annual Statement for Low-Income Housing Credit.

## States

### Alabama

Added Schedule PC, Passthrough Credits.

### Alaska

Added electronic filing (2014 and 2015).

### California

- Added new Form 3592, College Access Tax Credit.
- Added new Form 3531, California Competes Tax Credit.

### Connecticut

- PDFs added to electronically filed extensions.
- Batch extensions available for electronically filed returns.

### Idaho

Added Form 75, Fiscal Year Fuels Use Report.

### Illinois

- Now includes withholding from Form EF K-1-P on the return.
- Form 8879-IL signature forms added.

### Indiana

Added electronic filing (2014 and 2015).

### Iowa

Added Form IA 133, Iowa New Jobs Tax Credit.

### Kentucky

Added electronic filing.

### Kentucky - Kentucky Cities

- Added Form OL-S, Occupational License Fee Return:
  - ◆ This generic version replaces prior OL-3, 228, 228S.
  - ◆ Allows us to expand our KYC offerings beyond Lexington and Louisville in future years.

### Louisiana

- Added Form R-620GIW, Reduction in Exclusions and Deductions Worksheet (2014 and 2015).
- Added Form R-620CNR, Nonrefundable Credit Reduction Worksheet (2014 and 2015).
- Added Form R-620CRW, Refundable Credit Reduction Worksheet (2014 and 2015).

## Maine

Added Form 901ES-ME EXT, Pass-Through Entity Withholding Extension Payment Voucher.

## Massachusetts

- Added Allotment CHDC, Certified Housing Development Credit.
- Added Individual Certificate CHDC, Certified Housing Development Credit.
- Added Transfer/Sale CHDC, Certified Housing Development Credit Certificate.

## Michigan - Michigan Cities

Added Detroit D-1120(Ext), City of Detroit Corporate Income Tax - Extension Request.

## New Jersey

- Added electronic filing for estimates.
- Added electronic filing for extensions.

## New Mexico

Added electronic filing for Form PTW-D, Annual Withholding of Net Income From a Pass-Through Entity Detail Report.

## New York

New York is being updated to reflect major legislative changes for 2015.

## North Carolina

- Added the ability to create multiple additional LLC Annual Reports.
- Added D-403 Schedule K-1 for e-file use.
- Added electronic filing (2014 and 2015).

## Rhode Island

Business Franchise Tax has been eliminated.

## Tennessee

Added Form FAE 174, Franchise and Excise Financial Institution and Captive Real Estate Investment Trust Tax Return.

## Vermont

Added electronic filing (2014 and 2015).

## West Virginia

Business Franchise Tax has been eliminated.

## Wisconsin

Added electronic filing for estimate payments.

# Fiduciary (1041) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

## Federal

### Banking

- Standardized Banking options and presentation with other systems.
- Added Office Manager option to not pro forma bank account information.

### Depreciation (1040/1120/1120S/1065/1041)

Added new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

In worksheet view, an export only field was added for calculated current year depreciation.

### New Input

Added 1099-INT and 1099-DIV. Removed B-series.

### New Drill Downs

- Form 8960, Line 18b
- Schedule B, Line 8

### Miscellaneous

- Split out Fiduciary Name and Title.
- Mark-to-Market Election for multiple blocks of stock for Form 8621.

### Letters and Filing Instructions

- Added mailing address for Form 56 when 1041 is e-filed.
- Suppress K-1 paragraphs in letters and filing instructions when K-1s are suppressed.
- Added accountant prepared paragraph options to transmittal letter.

## States

### All States

Split out Fiduciary Name and Title.

### Arkansas

Added separate main forms to be used as transmittals for 5227 returns.

### Arizona

Added electronic filing.

## Connecticut

- Added CT-1041WH.
- Added electronic filing.
- Added electronic filing extension.

## District of Columbia

Added electronic filing.

## Idaho

- Added electronic filing.
- Added electronic filing extension.

## Indiana

Added Form IT-41 Schedule K-1.

## Iowa

- Added Form 8453-F.
- Added electronic filing.

## Kansas

Added Form K-41V.

## Louisiana

- Added Form R-540-G1, Credit for Taxes Paid to Other States (to 2014 and 2015).
- Added Form R-620CRW, Refundable Credits Reduction (to 2014 and 2015).
- Added Form R-620CNR, Nonrefundable Credits Reduction (to 2014 and 2015).

## Mississippi

Added electronic filing.

## New Jersey

Added electronic filing batch extensions.

## New Mexico

Added electronic filing.

## North Carolina

Added electronic filing.

## Oregon

- Added Form OR-41 Sch ASC.
- Added electronic filing.

## Pennsylvania

Added electronic filing extensions (regular and batch).

## Tennessee

- Added electronic filing.
- Added electronic filing extensions.

## Utah

- Added electronic filing.
- Added electronic filing extensions.

## Vermont

- Added Form VT Schedule K-1.
- Added Form VT FIT-166.
- Added Form 8879-VT-F.
- Added electronic filing.

## Wisconsin

Potentially will need to add the following forms (electronic filing mandates):

- Form A-1, Apportionment Data for Single Factor Formulas
- Form MA-A, Wisconsin Agricultural Credit
- Form MA-M, Wisconsin Manufacturing Credit
- Schedule R, Wisconsin Research Credits
- Schedule FC, Farmland Preservation Credit
- Schedule FC-A, Farmland Preservation Credit

# Exempt Organization (990) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Added a summary grid that displays all bank accounts entered.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### New Letters/Filing Instructions

Add a sentence with the last 4 digits of the bank account number.

### New Options

Added new Pro Forma option in Office Manager - the ability to pro forma estimate payment amounts is now available.

### Miscellaneous

Added electronic filing for Form 8868, Application for Extension of Time To File an Exempt Organization Return for Form 990-T, Exempt Organization Business Income Tax Return.

# Estate and Gift (706/709) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

There are no updates available with this release.



# Employee Benefit Plan (5500) Product Enhancements - Worksheet View

Return to [Table of Contents](#).

Added New Form 5500-SUP - Annual Return of Employee Benefit Plan Supplemental Information.

Added New Form Form 14704 - Transmittal Schedule - Form 5500-EZ Delinquent Filer Penalty Relief Program (Revenue Procedure 2015-32).

## Tax Product Enhancements 2015.01000 - Interview View

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### Individual (1040) Product Enhancements - Interview View

Return to [Table of Contents](#).

#### Federal

#### Banking

- Entries of “blank/blank” or “S/blank” in the FS/State fields now carry to all states in the return.
- Added Office Manager option to not pro forma bank account information.
- Added a new confirmation question to Organizer.
- Added a summary grid that displays all bank accounts entered.
- Included the last 4 digits of the bank account in the letters/filing instructions.

#### Depreciation (1040/1120/1120S/1065/1041)

Added a new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

#### New Forms

- Form 4852, Substitute for Form W-2, Wage and Tax Statement
- Expecting from IRS: Form 8885, Health Coverage Tax Credit
- Expecting from IRS: Form 8965 Shared Responsibility Worksheet
- Expecting from IRS: Form 8965 Worksheet B

#### New Input

IRS 1099-QA, Distributions from ABLE accounts

#### New Drill Downs

- Form 1040, Line 9a
- Form 1040, Line 18
- Schedule A, Line 5
- Schedule B
- Schedule C, Lines 1, 10, 11, 15, 16a, 21, 22, 24a, 25, and 26
- Schedule F, Lines 12, 21a, 21b, and 29

#### New Letters/Filing Instructions

- 1040-C
- Form 3520-A
- Form 3520

- Form 8802
- Added a sentence with the last 4 digits of the bank account number

## Eliminate Duplicate Input

- Interview Form P-16, fields related to Form 8863, Education Credits, are now only on 1098-T.
- Interview Forms D-11, D-11A, and D-12 are now only Interview Forms D-1 and D-2.
- Interview Form M-5 is now exclusively Form 1099Q.

## Miscellaneous

Added Mark-to-Market Election for multiple blocks of stock for Form 8621.

## TEQ

- Alabama part-year (TEC & regular tax) reads entries from Interview Form ST-1
- Hypothetical Form 1040: Option added to exclude state refunds. Interview Form M-3, Box 170.
- Hypothetical Form 1040: Option added to suppress hypothetical lines 64 through 68. Interview Form TE-1A, Box 55.
- Hypothetical Form 1116: Added ability to include foreign tax payments in hypo calc. Interview Form P-2, Box 153.
- Hypothetical Form 1116: Added ability to include prior year foreign tax payments in hypo calc. Interview Form P-2, Box 160.
- Hypothetical Form 1116: Added ability to enter hypothetical FTC carryovers. Interview Form P-3, Boxes 100-119. These amounts will pro forma. Also added for AMT.
- Hypothetical Form 2555: Added ability to include foreign travel period in hypo calc. Interview Form 32, Box 100.
- Hypothetical Form 2555: Added ability to have a hypothetical tax home history different from actual return. Interview Form M-11, Boxes 80-103.
- Hypothetical Form 2555: Added ability to enter different bona fide residence dates for hypothetical purposes. Interview Form M-11, Boxes 110-111.
- Hypothetical Form 2555: Added ability to enter different physical presence test dates for hypothetical purposes. Interview Form M-11, Boxes 115-116.
- Hypothetical Form 2555: Added ability to enter hypothetical qualified housing expenses. Interview Form M-9, Box 152.
- Hypothetical Form 2555: Added ability to select a different optimization code for hypo calc. Interview Form TE-1A, Boxes 53 & 54.
- Cash Flow & Reconciliation write-in amounts: Changed descriptions to be more intuitive. Program functionality did not change. Interview Form TE-4, Box 31.
  - ◆ Code 1 Addition to Tax changed to Other Employee Payments.
  - ◆ Code 2 Reduction from Tax changed to Other Hypothetical Taxes.
  - ◆ Code 3 Other Payments changed to Other Company Payments.
- Hypothetical FICA/Medicare: Added ability to separately include wages in the FICA/Medicare calculation. This option applies at the entity level. Interview Form IRS-W2, Box 222 and Exp-1, Box 109.
- Cash Flow summaries: Government-to-interview links expanded
- Hypothetical NYC/Yonkers/MCTMT - adjustment & override. Interview Form TE-11B.

- Hypothetical Credit for taxes paid other states - adjustment & override. Interview Form TE-10, Boxes 97-100.
- Hypothetical Sch B Interest - shows only those items included in the hypothetical calculation. Overflows to form.
- Hypothetical Sch B Dividends - shows only those items included in the hypothetical calculation. Overflows to form.

### Other Foreign

- Expatriate: Allocation of Compensation worksheet. Option added to print only those compensation items that are in the return. Overflow items print on another form rather than continuation statements. Interview Form 25, Boxes 64 & 65.
- Generic treaty treatment - Will add field listing countries that are not yet supported with a treaty calculation. When a country is entered, interest, dividends & wages will be resourced as foreign source. Interview Form 28, Box 42.

## States

### Alabama

- Interview Form ST-1 functionality added for part-year residents.
- Added Schedule AJA, Alabama Jobs Act - Investment Credit.
- Added Schedule DEC, Career Technical Dual Enrollment Credit.
- Added Schedule HTC, Historic Tax Rehabilitation Credit.

### Arizona

Added credit Form 338, Credit for Investment in Qualified Small Business, for paper and electronic filing.

### Arkansas

Added Form AR-RET, Retirement Exclusion Worksheet.

### California

- State withholding from K-1s will now be picked up for electronic filing purposes. You no longer have to move the withholding to IRS-1099MISC in order to electronically file. Diagnostic 41291 will no longer issue in this situation.
- NONE or 99-9999999 can now be used for a foreign employer ID on foreign W-2s for California electronic filing. Diagnostic 45575 will no longer issue in this situation.
- Form 3554, New Employment Credit can now have multiples of the form.
- Added Form 3514, EIC Tax Worksheet
- Added Form 3592, College Access Tax Credit.
- Added Form 3531, California Competes Tax Credit.

### Connecticut

Added option to e-file estimate payments.

### District of Columbia

Installation of new EIC / Earned Income worksheet.

## Idaho

Added Form 75B, Fuels Use Report for Fuel Bought after 1/1/15.

## Illinois

- Web Pay paragraph option was added (should automatically generate if conditions are met or can be forced on Interview Form IL1, Box 36).
- Add IL to Code 19 on 1099R to exclude from pension treatment (not create a subtraction).
- Option to e-file estimate payments.

## Indiana

Added enum table for ISO code e-file requirements.

## Iowa

- Interview Form IA1A is replacing Interview Form IA1, Boxes 60 through 76 to allow all prior and current year federal tax, payment and credit amounts to be used in the calculation.
- Added option to e-file estimate payments.

## Kansas

- Itemized deductions for Kansas will include 50% of real estate taxes, personal property taxes and qualified residence mortgage interest plus 100% of charitable contributions.
- Partnership guaranteed payments will be added to Kansas AGI (they were previously excluded from Kansas AGI along with all other business income).
- Gain(s) from sales of Christmas trees from Christmas tree farms will be subtracted from Kansas AGI.
- Income threshold for Form K40-H increases to \$34,000.
- Income threshold for Form K40-PT increases to \$19,100.
- Added option to e-file estimate payments.

## Kentucky

Added option to e-file estimate payments.

## Kentucky - Kentucky Cities

- Added Form OL-S, Occupational License Fee Return:
  - ◆ This generic version replaces prior OL-3, 228, and 228S.
  - ◆ Allows us to expand our KYC offerings beyond Lexington and Louisville in future years.

## Louisiana

- Added Form R-540-G1, Credit for Taxes Paid to Other States (to 2014 and 2015).
- Added Form R-540CRW, Refundable Credits Reduction (to 2014 and 2015).
- Added Form R-540CNR, Nonrefundable Credits Reduction (to 2014 and 2015).

## Maine

Added option to e-file estimate payments.

## Maryland

- Added Form 502LC, State and Local Credit for Income Tax Paid to Other States and Localities (2012, 2013, 2014).
- Autogenerate PDFs for Forms 502TP and 500DM.

## Massachusetts

Add diagnostic regarding MA IRA income basis.

## Michigan - Michigan Cities

- Detroit E-file.
- Added Form 5118, Detroit Resident Income Tax Return.
- Added Form 5119, Detroit Nonresident Income Tax Return.
- Added Form CF-8879, Generic eFile Signature Authorization.

## Minnesota

- Added option to e-file estimate payments.
- Added MN Property Tax Filing Instructions.

## Nebraska

Added option to e-file estimate payments.

## New Mexico

Added RPD-41083, Affidavit to Obtain Refund Due a Deceased Taxpayer.

## New York

- Re-added 2D barcode.
- Added Form IT-114, Claim for Family Tax Relief Credit.
- Added Form IT-2, Summary of W-2 Statements.
- Added Form IT-639, Minimum Wage Reimbursement Credit.
- Tentatively added IT-611, IT-611.1 and IT-612, forms related to claims for Brownfield Redevelopment Tax Credit.
- Added Form IT-370 (EXT), Application for Six Month Extension.
- Added TEQ for NYC and Yonkers.

## North Carolina

Added option to e-file estimate payments.

## North Dakota

Added option to e-file estimate payments.

## Ohio

- Added mandated 2D barcode.
- Added Form 40-XP, Income Tax Payment Voucher (Amended).
- Added Form SD 40-XP, School District Income Tax Payment Voucher (Amended).

## Oregon

Added Form OR Sch OR-D, Charitable Checkoff Donations.

## Pennsylvania

- Added Form W-2 RW, W-2 Reconciliation Worksheet.
- Added option to e-file estimate payments.
- Added electronically filed extensions for both TP & SP separately or combined.
- All K-1 company information including telephone number, etc., now pro forma from year to year.

## Virginia

- Added statement for 65 and older income based deduction for part-year residents.
- Added Form 760-PFF, Payment Coupon for Farmers, Fishermen and Merchant Seamen.

## West Virginia

- Added new Schedule DP, Schedule of Additional Dependents.

## Wisconsin

- Added new Schedule AR, Explanation of Amended Return.
- Added option to e-file estimate payments.

# Partnership (1065) Product Enhancements - Interview View

Return to [Table of Contents](#).

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### Depreciation (1040/1120/1120S/1065/1041)

Added a new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

### New Options

Added the ability to pro forma estimate payment amounts in the Office Manager Pro Forma options.

### New Drill Downs

- Form 1065, Schedule K, Line 11
- Form 1065, Schedule K, Line 13d
- Form 1065, Schedule K, Line 14c
- Form 1065, Schedule K, Line 16l
- Form 1065, Schedule K, Line 17b
- Form 1065, Schedule K, Line 17c
- Form 1065, Schedule K, Line 17f
- Form 1065, Schedule M-1, Line 1

### New Letters/Filing Instructions

Added a sentence with the last 4 digits of the bank account number.

### Miscellaneous

- Added Mark-to-Market Election for multiple blocks of stock for Form 8621.
- State Use help screens now include detail in the federal level help screen.
- Form 8878-A, IRS e-file Electronic Funds Withdrawal Authorization for Form 7004 is now included in the Extension print package.
- Form 8621 Part V, excess distribution calculation for lines 15a through 15e will now allow multiple holding period end dates for each block of shares.
- Added a new option on Interview Form P-6, Box 64 for Form 8609-A presentation of deferred 1st year credit in the 11th year.
- New option added for Form 8609-A to “Compute 11th year credit” on Interview Form P-6, box 111.



## States

### Alabama

Added Schedule PC, Passthrough Credits.

### California

- Added Form 3592, College Access Tax Credit.
- Added Form 3531, California Competes Tax Credit.

### Connecticut

- PDFs added to electronically filed extensions.
- Batch extensions available for electronically filed returns.

### Idaho

Added Form 75, Fiscal Year Fuels Use Report.

### Illinois

- Now includes withholding from Form EF K-1-P on the return.
- Added Form 8879-IL signature forms.

### Indiana

Added electronic filing.

### Iowa

Added Form IA 133, Iowa New Jobs Tax Credit.

### Kentucky

Added electronic filing.

### Kentucky - Kentucky Cities

- Added Form OL-S, Occupational License Fee Return:
  - ◆ This generic version replaces prior OL-3, 228, 228S.
  - ◆ Allows us to expand our KYC offerings beyond Lexington and Louisville in future years.

### Louisiana

- Added Form R-620CNR, Nonrefundable Credit Reduction Worksheet (2014 and 2015).
- Added Form R-620CRW, Refundable Credit Reduction Worksheet (2014 and 2015).

### Maine

Add Form 901ES-ME EXT, Pass-Through Entity Withholding Extension Payment Voucher.

## New Mexico

Added electronic filing for Form PTW-D, Annual Withholding of Net Income From a Pass-Through Entity Detail Report.

## New York

- Added ability to self-prepare for electronic filing of Form IT-204 and Form 204-LL.
- Added IT-611, IT-611.1 and IT-612, forms related to claims for Brownfield Redevelopment Tax Credit.
- Added Form IT-203-GR-ATT-C, Schedule C, Nonresident partners qualifying and participating in a metropolitan commuter transportation mobility tax (MCTMT).
- Added Form TR-99, Application for Permission To File a Group Return.

## North Carolina

- Added electronic filing.
- Added the ability to create multiple additional LLC Annual Reports.

## Oregon

Added electronic filing.

## Rhode Island

Business Franchise Tax has been eliminated.

## Vermont

Added electronic filing (2014 and 2015).

## West Virginia

Business Franchise Tax has been eliminated.

## Wisconsin

Added electronic filing for estimate payments.

# Corporation (1120) Product Enhancements - Interview View

[Return to Table of Contents.](#)

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### Depreciation (1040/1120/1120S/1065/1041)

Added a new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

### New Input

- New Office Manager option to complete Schedule M-3, Part I and prepare Schedule M-1.
- States that previously used state coded entries on passthrough input now can use the existing state column.

### New Drill Downs

- Form 1120, Page 1, line 29a - NOL
- Form 4626, Line 6 - AMT NOL
- Schedule M-3, Part II, lines 23a through 23g

### Miscellaneous

- Added Mark-to-Market Election for multiple blocks of stock for Form 8621.
- 8621 part V, excess distribution calculation for lines 15a through 15e will now allow multiple holding period end dates for each block of shares.
- State Use help screens now include detail in the federal level help screen.
- Form 8878-A, IRS e-file Electronic Funds Withdrawal Authorization for Form 7004 is now included in the Extension print package.
- Late payment and late interest is now included in total balance due on the bottom of Form 1120, Page 1.
- New print options for QPAI Workpaper on Interview DPAD-1, Box 34.
- New option on Interview Form 2, Box 49, to include Form 5471, Schedule I - Summary of Shareholder's Income from Foreign Corporations (line 6) on Form 1120, Schedule C - "Income from controlled foreign corporations under subpart F" (line 14).
- New option on Interview Form G-7 to include Form 5471, Schedule I - Summary of Shareholder's Income from Foreign Corporations (line 6) on Form 1118.
- Small corporation exemption now prints on top of Form 4626, when applicable.
- Added Sale of Assets Summary to consolidated returns.
- Added Consolidated Depreciation Differences worksheet for consolidated returns.
- Added input to allow an override of shareholder information at the consolidated level on Interview Form FO-1.

- Added a new option on Interview Form P-6, Box 64 for Form 8609-A presentation of deferred 1st year credit in the 11th year.
- New option added to “Compute 11th year credit” on Interview Form P-6, Box 111.

## Letters/Filing Instructions

Added a sentence with the last 4 digits of the bank account number.

## States

### Alabama

Added Schedule EC, Excise Credits.

### California

- Added electronic filing for Form 199, California Exempt Organization Annual Information Return.
- Added Form 3531, California Competes Credit.
- Added Form 3592, College Access Tax Credit.

### Connecticut

- Add electronic filing for estimates.
- PDFs added to electronically filed extensions.
- Batch extensions available for electronically filed returns.

### Idaho

Added Form 75, Fiscal Year Fuels Use Report.

### Illinois

- Now includes withholding from Form EF K-1-P on the return.
- Added Form 8879-IL signature forms.

### Iowa

- Added Schedule L, Iowa Nexus Adjustments.
- Added Form IA 133, Iowa New Jobs Tax Credit.

### Louisiana

- Added Form R-620GIW, Reduction in Exclusions and Deductions Worksheet (2014 and 2015).
- Added Form R-620CNR, Nonrefundable Credit Reduction Worksheet (2014 and 2015).
- Added Form R-620CRW, Refundable Credit Reduction Worksheet (2014 and 2015).

### Massachusetts

- Added Allotment CHDC, Certified Housing Development Credit.
- Added Individual Certificate CHDC, Certified Housing Development Credit.
- Added Transfer/Sale CHDC, Certified Housing Development Credit Certificate.

## Michigan - Michigan Cities

Added Detroit D-1120(Ext) - City of Detroit Corporate Income Tax - Extension Request.

## New Jersey

- Added electronic filing for estimates.
- Added electronic filing for extensions.
- Added electronic filing for annual reports.

## New York

New York is being updated to reflect major legislative changes for tax year 2015.

## New York City

New York City Corporation is being updated to reflect major legislative changes for tax year 2015.

## North Carolina

- Added the ability to create multiple additional LLC Annual Reports.
- Added D-403 Schedule K-1 for e-file use.
- Added electronic filing (2014 and 2015).

## Rhode Island

Business Franchise Tax has been eliminated.

## Vermont

Added electronic filing (2014 and 2015).

## West Virginia

Business Franchise Tax has been eliminated.

## Wisconsin

Added electronic filing for estimate payments.

# S Corporation (1120S) Product Enhancements - Interview View

Return to [Table of Contents](#).

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### Depreciation (1040/1120/1120S/1065/1041)

Added a new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

### New Input

States that previously used state coded entries on passthrough input can now use the existing state column.

### New Drill Downs

- Form 1120S, Page 1, Lines 22a, 22b, 23b and 23c
- Form 1120S, Schedule D, Lines 4, 5, 6, 11, 12 and 14

### New Letters/Filing Instructions

Added a sentence with the last 4 digits of the bank account number.

### Miscellaneous

- Added Mark-to-Market Election for multiple blocks of stock for Form 8621.
- State Use help screens now include detail in the federal level help screen.
- Form 8878-A, IRS e-file Electronic Funds Withdrawal Authorization for Form 7004, is now included in the Extension print package.
- Form 8621 part V, excess distribution calculation for lines 15a through 15e will now allow multiple holding period end dates for each block of shares.
- Added a new option on Interview Form P-6, Box 64 for Form 8609-A presentation of deferred 1st year credit in the 11th year.
- New option added to "Compute 11th year credit" on Interview Form P-6, Box 111.

## States

### Alabama

Added Schedule PC, Passthrough Credits.

### Alaska

Added electronic filing (2014 and 2015).

## California

- Added Form 3592, College Access Tax Credit.
- Added Form 3531, California Competes Tax Credit.

## Connecticut

- PDFs added to electronically filed extensions.
- Batch extensions available for electronically filed returns.

## Idaho

Added Form 75, Fiscal Year Fuels Use Report.

## Illinois

- Now includes withholding from Form EF K-1-P on the return.
- Form 8879-IL signature forms added.

## Indiana

Added electronic filing (2014 and 2015).

## Iowa

Added Form IA 133, Iowa New Jobs Tax Credit.

## Kentucky

Added electronic filing.

## Kentucky - Kentucky Cities

- Added Form OL-S, Occupational License Fee Return:
  - ◆ This generic version replaces prior OL-3, 228, and 228S.
  - ◆ Allows us to expand our Kentucky Cities offerings beyond Lexington and Louisville in future years.

## Louisiana

- Added Form R-620GIW, Reduction in Exclusions and Deductions Worksheet (2014 and 2015).
- Added Form R-620CNR, Nonrefundable Credit Reduction Worksheet (2014 and 2015).
- Added Form R-620CRW, Refundable Credit Reduction Worksheet (2014 and 2015).

## Maine

Added Form 901ES-ME EXT, Pass-Through Entity Withholding Extension Payment Voucher.

## Massachusetts

- Added Allotment CHDC, Certified Housing Development Credit.
- Added Individual Certificate CHDC, Certified Housing Development Credit.
- Added Transfer/Sale CHDC, Certified Housing Development Credit Certificate.

## Michigan - Michigan Cities

Add Detroit D-1120(Ext) - City of Detroit Corporate Income Tax - Extension Request.

## New Jersey

- Added electronic filing for estimates.
- Added electronic filing for extensions.

## New Mexico

Added electronic filing for Form PTW-D, Annual Withholding of Net Income From a Pass-Through Entity Detail Report.

## New York

New York is being updated to reflect major legislative changes for tax year 2015.

## North Carolina

- Added the ability to create multiple additional LLC Annual Reports.
- Added D-403 Schedule K-1 for e-file use.
- Added electronic filing (2014 and 2015).

## Rhode Island

Business Franchise Tax has been eliminated.

## Tennessee

Added Form FAE 174, Franchise and Excise Financial Institution and Captive Real Estate Investment Trust Tax Return.

## Vermont

Added electronic filing (2014 and 2015).

## West Virginia

Business Franchise Tax has been eliminated.

## Wisconsin

Added electronic filing for estimate payments.



# Fiduciary (1041) Product Enhancements - Interview View

Return to [Table of Contents](#).

## Federal

### Banking

- Standardized Banking options and presentation with other system.
- Added Office Manager option to not pro forma bank account information.

### Depreciation (1040/1120/1120S/1065/1041)

Added a new option to create a separate amortization report for federal, state, or both. When this option is selected, all amortization assets will go to the amortization report(s), and will not be on the regular depreciation report(s). New forms are Amortization Report for Current and Next Year (for both federal and state), and California Next Year Amortization Report.

### New Input

- Added 1099-INT and 1099-DIV.
- Removed B-series.

### New Drill Downs

- Form 8960, Line 18b.
- Form Schedule B, Line 8.

### New Forms

Added Schedule K-1 workpaper for capital gains reconciliation.

### Miscellaneous

- Split out Fiduciary Name and Title.
- Added Mark-to-Market Election for multiple blocks of stock for Form 8621.

### Letters and Filing Instructions

- Added mailing address for Form 56 when 1041 is e-filed.
- Suppress K-1 paragraphs in letters and filing instructions when K-1s are suppressed.
- Added to transmittal letter accountant prepared paragraph options.

## States

### All States

Split out Fiduciary Name and Title.

### Arkansas

Added separate main forms to be used as transmittals for 5227 returns.

## Arizona

Added electronic filing.

## Connecticut

- Added CT-1041WH (to 2014 and 2015).
- Added electronic filing.
- Added electronic filing extension.

## District of Columbia

Added electronic filing.

## Idaho

- Added electronic filing.
- Added electronic filing extension.

## Indiana

Added Form IT-41 Schedule K-1.

## Iowa

- Added Form 8453-F.
- Added electronic filing.

## Kansas

Added Form K-41V (to 2014 and 2015).

## Louisiana

- Added Form R-540-G1, Credit for Taxes Paid to Other States (to 2014 and 2015).
- Added Form R-620CRW, Refundable Credits Reduction (to 2014 and 2015).
- Added Form R-620CNR, Nonrefundable Credits Reduction (to 2014 and 2015).

## Maryland

Added Form 502LC (to 2012, 2013, 2014 and 2015).

## Mississippi

Added electronic filing.

## New Jersey

Added electronic filing batch extensions.

## New Mexico

Added electronic filing.

## North Carolina

Added electronic filing.

## Oregon

- Added Form OR-41 Sch ASC.
- Added electronic filing.

## Pennsylvania

Added electronic filing extensions (regular and batch).

## Tennessee

- Added electronic filing.
- Added electronic filing extensions.

## Utah

- Added electronic filing.
- Added electronic filing extension.

## Vermont

- Added Form VT Schedule K-1.
- Added Form VT FIT-166.
- Added Form 8879-VT-F.
- Added electronic filing.

## Wisconsin

Potentially will need to add the following forms (electronic filing mandates):

- Form A-1, Apportionment Data for Single Factor Formulas.
- Form MA-A, Wisconsin Agricultural Credit.
- Form MA-M, Wisconsin Manufacturing Credit.
- Schedule R, Wisconsin Research Credits.
- Schedule FC, Farmland Preservation Credit.
- Schedule FC-A, Farmland Preservation Credit.

# Employee Benefit Plan (5500) Product Enhancements - Interview View

Return to [Table of Contents](#).

## Federal

Added Form 5500-SUP - Annual Return of Employee Benefit Plan Supplemental Information.

Added Form 14704 - Transmittal Schedule - Form 5500-EZ Delinquent Filer Penalty Relief Program (Revenue Procedure 2015-32).

# Exempt Organization (990) Product Enhancements - Interview View

Return to [Table of Contents](#).

## Federal

### Banking

- Added Office Manager option to not pro forma bank account information.
- Added a summary grid that displays all bank accounts entered.
- Included the last 4 digits of the bank account in the Letters/Filing Instructions.

### New Letters/Filing Instructions

Added a sentence with the last 4 digits of the bank account number.

### New Option

Added the ability to pro forma estimate payment amounts to the Pro Forma options in Office Manager.

### Miscellaneous

Added electronic filing for Form 8868, Application for Extension of Time To File an Exempt Organization Return for Form 990-T, Exempt Organization Business Income Tax Return.

# Estate and Gift (706/709) Product Enhancements - Interview View

Return to [Table of Contents](#)

There are no updates available with this release.