

2017.05020
Release Notes

January 06, 2019



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Contact and Support Information

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 Year 2017 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/Roll Forward, Organizer, technology enhancements)
- Updates made to Tax products (form additions and updates, diagnostic updates, changes caused by regulatory updates)

CCH[®] ProSystem fx[®] and CCH[®] Global fx Tax Updates

Individual

Pro Forma. A New Hampshire issue that prevented Pro Forma from completing for certain returns is resolved.

Corporation and S Corporation

Texas. The 2019 Franchise Tax Report Forms are available for processing. Electronic filing of the 2019 reports is not available at this time and will be included on a future release.

Philadelphia. 2018 Forms BIRT and BIRT-EZ are available. We are awaiting approval for these forms from the city of Philadelphia.

S Corporation

Ohio. 2018 Forms IT 4708, IT 4708 ES, Universal Payment Coupon, and Form IT/SD 2210 fiscal year updates are available. We are awaiting approval for these forms from the state of Ohio.

Estate and Gift

Final Forms 706 for dates of death in 2018 are available for federal filings.

CCH[®] ProSystem fx[®] Tax (Only) Updates

Individual

Organizer. The question regarding total mortgage balances on Page 3 of the Questions pages reflects \$750,000.

Electronic Filing Updates

Partnership, Corporation, S Corporation, and Exempt Organization

California. Electronically filed extensions must be recalculated and resubmitted on the latest schema version made available on this release.

Product Updates

Individual (1040) Product Updates

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Organizer

The question regarding total mortgage balances on Page 3 of the questions pages uses an amount of \$750,000 to reflect law changes contained in the Tax Cuts and Jobs Act. On releases prior to this release, Questions Page 3 can be customized to update the amount from \$1,000,000 to \$750,000 using the following steps:

1. From Production Processing, select Process Client Organizers > Create a Custom Letter > Individual.
2. When the Custom Forms Editor opens, choose File > New > Template and select Questions Page 3.
3. Make the desired changes, save the template, and exit the editor.
4. Return to Production Processing and choose Process Client Organizers > Customize Organizer > 2017 to 2018 > Individual (if not already selected) and click OK.
5. Select the custom form(s) that should be replaced within the organizer with the customized version. Select Edit and then choose Suppress Print.
6. Select Insert, choose the file name of the template created using the Custom Forms Editor, and enter a form description. Click OK.
7. If the custom form(s) created should replace an existing form in the Organizer, verify that printing for the existing form has been suppressed.
8. Click OK on the Customize Organizers dialog to save your changes and exit.

Vermont

When the election is made in Office Manager to allow the state to contact the preparer, it is reflected in the electronic file. Preparers will need to send a copy of the signed and authorized return if they need to discuss the return in question with the state.

Corporation (1120) Product Updates

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Federal

A return with a KS NOL carryforward will no longer prevent other NOL carryovers from rolling forward into 2018.

Texas

The 2019 Franchise Tax Report Forms are available for processing. Electronic filing of the 2019 reports are not available at this time but will be included on a future release.

Estate and Gift (706/709) Product Updates

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Federal

The following final forms are available for dates of death in 2018:

| | | |
|--------------|--------------|--------------|
| Form 706 | Schedule F | Schedule O |
| Schedule A | Schedule G/H | Schedule P/Q |
| Schedule A-1 | Schedule I | Schedule R |
| Schedule B | Schedule J | Schedule R-1 |
| Schedule C | Schedule K | Schedule U |
| Schedule D | Schedule L | Schedule PC |
| Schedule E | Schedule M | |