

2018.02040
Release Notes

February 3, 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 2018 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)

2018 Tax Updates

Release 2018.02040 Highlights of Tax Reform Changes

Forms and calculations available on a future release:

Individual, Fiduciary, and Tax Exempt

Form 8990, Limitation on Business Interest Expense IRC 163(j)

New calculations available for review; forms not ready for general use:

- Qualified Business Income Deduction (QBID) - new, final regulations received
- Form 8990, Limitation on Business Interest Expense IRC 163(j) - Corporation, Partnership, S Corporation only
- Form 8992, U.S. Shareholder Calculation of Global Intangible Low-Taxed Income (GILTI)
- Form 8994, Employer Credit for Paid Family and Medical Leave - Individual and Fiduciary only
- Form 965 and accompanying schedules


Extender Legislation

We are monitoring Extender Legislation pending in Congress, and will provide updates if new legislation is introduced and proceeds toward passage.

Paper Batch Extension Program

Individual, Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization

The Batch Extension program is now available for processing multiple extensions. Extensions are processed using Production Processing > Extensions, Estimates & Electronic Filing > Print first extensions or Print second extensions.

 **Note:** All systems - District of Columbia requires confirmation of the accuracy of prior year (pro formaed) data.

Individual

Tax Projector

Tax Projector is available in this release.

Tax Equalization

Tax Equalization is available in this release. New functionality related to TCJA will be available on future releases.

2018 Electronic Filing Updates

Approved Products Available on this Release

The following federal and state products are approved and available on this release:

Partnership

Connecticut	Minnesota	Virginia
Connecticut Extension	New Hampshire	Wisconsin
Illinois	New Hampshire DP-10	Wisconsin PW-1

Individual

California	Missouri	Pennsylvania Extension
California Extension	Multnomah	South Carolina
Illinois	New York City	Tennessee
Iowa	New York City Extension	Tennessee Extension
Louisiana Nonresident	Ohio	Texas
Louisiana Resident	Oregon	Texas Extension
Mississippi	Pennsylvania	Wisconsin

Fiduciary

Arkansas	Illinois	New Hampshire Form DP-10
Arkansas Extension	Kentucky	New Hampshire Form BT-Summary
Connecticut	Kentucky Extension	Ohio
Connecticut Extension	Maine	Tennessee
Georgia	Missouri	Tennessee Extension

Corporation

Detroit	Michigan	Virginia
Detroit Consolidated	Michigan Consolidated	Virginia Consolidated
Illinois	New Hampshire	

S Corporation

Alabama	Illinois	Wisconsin Estimates
Alabama PPT	Michigan	Wisconsin PW-1
Alabama Composite	Minnesota	Wisconsin PW-1 Estimates
Alaska	Minnesota Estimates	Wisconsin Form 4
Connecticut	New Hampshire	Wisconsin Form 4 Estimates
Connecticut Extension	Virginia	
Detroit	Wisconsin	

Exempt Organization

Virginia

Batch Electronic Filing of Extensions

Batch electronic filing of extensions is available on this release for the taxing authorities listed below. To process your e-file extensions, go to Production Processing > Extensions, Estimates & Electronic Filing > e-file > Extensions > Federal or State.

Please remember the security requirements for electronically filing extensions. You must enter this information in the return prior to running batch e-file of extensions. Without this information, we will not process the extension. This information is:

- **1040 returns - New York.** New York requires an affirmative response regarding a driver's license, a state ID, or No Identification. If an identification is not available, this must be indicated.
- **All systems - District of Columbia.** Requires confirmation of the accuracy of prior year (prior year) data.

Partnership

Federal	Maryland	North Carolina
Arkansas	New Jersey	Texas
Kentucky	New York	

Individual

Federal	New Jersey	New York
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Corporation

Federal	Maryland	Pennsylvania
Arkansas	New York	Texas
Kentucky	North Carolina	

S Corporation

Federal	Kentucky	Pennsylvania
Arkansas	New York	Texas
Florida	North Carolina	

Exempt Organization

Federal	New York
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Product Updates

Individual (1040) Product Updates

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Montana

Form 2, Page 4 allows \$3,500 each for taxpayer and spouse MSAs on married filing jointly returns.

No calculated limits to the apprenticeship tax credit will apply. The amount entered should be limited by the tax preparer.

Oregon

Records of non-passive income from Federal Schedules C, E, and F are shown separately on Schedules OR-PTE.

The residential energy credit code 861 on Schedules OR-ASC or OR-ASC-NP populates the 'Amount awarded this year' column when entered.

Partnership (1065) Product Updates

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Delaware

Print positions have been updated on several forms per state specifications.

Maine

941P-ME, Schedule 2p, will correctly withhold from non-resident partners not electing to be included in composite returns.

Massachusetts

Brownsfield, Medical Device, and Film Credits are no longer allowed on Schedule CMS. Nonrefundable amounts are listed as shared to be passed through to individual owners on Schedule 3K-1.

Ohio

If the Ohio return (IT 4708 or IT 1140) is not produced either because it's suppressed or the minimum requirement is not met, Form IT K-1 will be produced and will print unless otherwise suppressed.

Oregon

Portland Schedule R, Residential Rental Registration, has been added to the program.

Pennsylvania

Form PA 65-Corp, Directory of Corporate Partners, now displays in print preview.

Utah Electronic Filing

Form TC-559 EXT, Corporation/Partnership Coupon. The Utah Extension will now be disqualified from electronic filing if no payment is requested.

Corporation (1120) Product Updates

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Delaware

Print positions have been updated on several forms per state specifications.

Florida

Form F1120 Schedule I, Line 3 now prints statement for net operating losses.

Maine

2D barcode has been updated to the state specifications.

Oregon

Portland Schedule R, Residential Rental Registration, has been added to the program.

S Corporation (1120S) Product Updates

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Federal

Total unadjusted basis of assets now shows on QBI Schedule, when there are multiple assets included.

Delaware

Print positions have been updated on several forms per state specifications.

Maine

Print positions have been updated on several forms per state specifications.

Oklahoma

Form 200, Schedule B, General Information. Information input for US and foreign address from Oklahoma > Franchise Tax > 2 - Franchise Tax Return Schedule B, C, and D (Interview OK8, Boxes 32 - 39) will now display correctly.

Oregon

Portland Schedule R, Residential Rental Registration, has been added to the program.

Fiduciary (1041) Product Updates

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Federal

Schedule H. California is no longer a credit reduction state. Question 10 on Part 2 will be marked "Yes" and Section A will generate when contributions paid to state unemployment fund is from California.