

2018.03030
Release Notes

March 31, 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)

Highlights for Release 2018.03030

2018 Tax Updates

Please refer to the [Release Notes](#) for 2018 Tax Product Updates.

Detailed information about the tax updates is available in our Knowledge Base. See the [Hot Topics](#) page on the Tax Support site for links to articles that can help you apply these updates.

2018 Electronic Filing Updates

Approved Products Available on this Release

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

Corporation

Georgia Consolidated

West Virginia Consolidated

Product Updates

Individual (1040) Product Updates

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Federal

Form 1116

- Foreign branch income basket self-employed health insurance is allocated to the foreign basket for activities that have foreign sourced self-employment income.
- When the option to allocate state and local taxes to US source is selected, the amount from Schedule A, Line 5e is treated as US source.

New York

Form IT-196, Line 40 worksheet calculates correctly for Head of Household returns.

Form NYC-208, Line 26 calculates correctly when 1.5% rate applies.

Oregon

Carry forward credits for S Corporation shareholders flow to Schedule OR-ASC/OR-ASC-NP.

The College Opportunity Grant addition code 165 and modification code 652 are available.

Oregon - Multnomah/Portland/TriMet

Schedule R

- Input on Multnomah / Portland > General (Interview Form MUL2) allows multiple units for a given rental entity.
- Now produces if the "Kind of property" field is not entered on Rent and Royalty > General (Interview Form E-1, Box 41).

Rhode Island Electronic Filing

When there is a balance due and banking information entered for electronic withdrawal, the default date for that withdrawal is 4/15/19 for the current filing season.

Virginia

Schedule A, Line 8a includes mortgage interest.

Partnership (1065) Product Updates

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Kentucky

Schedule K, Line 11 amount now matches the statement for this line.

S Corporation (1120S) Product Updates

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California

The taxpayer name has been updated on the S Corporation returns filing Form 540NR, Group Nonresident Return.

Fiduciary (1041) Product Updates

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Electronic Filing

Disqualifying diagnostic 40320 issues when the home state code is "MA" or "ME" and the fiduciary's address state code is other than "MA" or "ME". This diagnostic will instruct the user to enter a date of 04/15/2019 or earlier to avoid receiving a rejection from the IRS.

Vermont

The Vermont Fiduciary Estimated Tax Payment Vouchers, Form FIT-165, now show the year as 2019.

Estate and Gift (706/709) Product Updates

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Federal

The following Preliminary forms are available for dates of death in 2019:

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