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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

Individual and Fiduciary

Form 8990, Business Interest Expense Limitation, is prepared if requested on Federal > Other > 8990 Limitations for Business Interest Expense (Interview Form BIE-1). Current automated functionality is limited to the inclusion of passthrough activities indicated on the 8990 input, where a current year interest amount is entered. Form 8990, page 3 populates when excess business interest, excess taxable income, or excess interest income is entered for a passthrough.

Future planned functionality for tax year 2018 includes calculating the business interest expense limitation on Form 8990 for indicated entities on 8990 input, then recalculating Schedule C, E, or F based on the allocation of the limitation.

Product Updates

Individual (1040) Product Updates

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Federal

Form 461. When nonbusiness portfolio income in a K-1 is positive and the activity has a loss, the nonbusiness portion will appear on Line 10 instead of Line 11. When nonbusiness portfolio income in a K-1 is negative and the activity has positive income, the nonbusiness portion will appear on Line 11 instead of Line 10.

Form 1116. Diagnostic 28746 is issued when foreign tax is taken as a deduction on Schedule A and foreign tax credit carryovers are included on Form 1116.

Form 5471

- Schedule B, Part II, will now generate if the category of filer is 5.
- Schedule E, Part I, Column (j) will now calculate by using the amount from Column (g) to match the business Form 5471 calculation.

Form 8938. Zero prints on Part V, Line 4 when zero is entered for the maximum value of the account.

Form 8962

- When two IRS 1095-A's are associated with the same entity/activity, the premiums, SLCSPP premiums and APTC used to calculate Form 8962 - Iterative/Simplified Method Recalculations worksheet, Form 8962, Lines 11E through 23E are the sum of the premiums, SLCSPP premiums and APTC from both.
- When using the Iterative method to calculate the SE health deduction and the PTC and there are multiple deductions/exclusions for which additional calculations are required, the Form 8962 - Iterative/Simplified Method Recalculation worksheet, Column 1 for the last deduction/exemption, modified AGI includes the SE health deduction.

IRS Notice 2019-24 for high cost housing limitations allows individuals to apply the higher limitation published in this notice to their 2018 taxable year for Form 2555 purposes.

The higher limitations for the following cities have been implemented into the calculation:

- Barbados - Bridgetown
- Canada - Toronto
- Germany - Pfullendorf
- Guatemala - Guatemala City
- Japan - Atsugi, Camp Zama, Chiba-Ken, Fussa, Haneda, Iwakuni, Kanagawa-Ken, Machidi-Shi, Misawa, Okinawa Prefecture, Sagami-hara, Saitama-Ken, Sasebo, Tachikawa, Tokyo, Tokyo-to, Yokohama, Yokosuka, Yokota
- Switzerland - Bern, Geneva

Mortgage Interest Worksheet. Average balances of home equity debt will not show in Line 12.

QBID. Qualified Business Income After Deductions, Lines 3a and 3b will show the net earnings from Schedule C or Schedule F when there are multiple retirement account contributions for the taxpayer or multiple retirement account contributions for the spouse.

Tax Equalization. Schedules 1 through 5 print in the government copy when the option to print Tax Equalization in the government copy is selected.

Electronic Filing

Form 2555. Form 2555, Line 18(d) is filled with a maximum of 366 days in order to comply with electronic filing requirements.

Alabama

Schedule NTC prints when the only credit present is the Capital credit.

Arizona

Arizona no longer includes amounts related to Form 461 and 8992 on 140 Line 36.

Arkansas

AR-1000F, Line 18A will now pull amounts from AR-RET if it is present in the return.

AR3, Line 9 will now produce the correct home mortgage interest amount.

Delaware

Overrides entered on Federal input forms for Taxable social security benefits will now flow to Line 26B in addition to 13B on the Delaware nonresident forms.

SEP amounts will now flow to Delaware returns when maximization option is chosen for SEP deduction on federal input forms.

District of Columbia

Form D-40, Line 16 standard deduction calculation for a dependent is limited to earned income.

Idaho

Child Tax credit on Form ID 40 only includes dependents indicated through input.

Form 39NR, Part B, Line 1, Column A no longer includes Idaho source NOLs.

Idaho itemized deductions correctly calculate the state and local income or general sales tax reduction amount to Federal Schedule A.

Input for Taxpayer/Spouse state of current residency now flows to the ID Form 43.

Illinois

Negative interest entries are included in the calculation of IL-1040, Line 2.

Schedule 1299-C, Step 3, Line 21 is updated to calculate the Column H amount when Line 20 is equal to 0. This resolves reject IL1299C-22070-1.

Iowa

Form IA 2106 now picks up all source amounts.

Maryland

MD PV will print in fileable copy when not electronically filed.

Montana

Credit for taxes paid statement produces when more than one state is present for the taxpayer or spouse on Form 2, Page 8.

Gambling losses are limited by gambling winnings for itemized deductions.

Married filing jointly taxpayers are allowed the elderly homeowner's credit even if only one of them is over the age of 62.

Overpayments that are only partially applied to next year correctly calculate on MT Form 2, Line 24.

Prior year overpayments from 2017 applied to 2018 show as a payment on the 2 year comparison worksheet and custom filing instructions.

When the filing status is 2b or 2c on Form 2, Page 5, Line 10 is now \$16,000 instead of \$25,000.

New Hampshire

BET Credits, including credit carryovers, now carry to Form NH-1040, Line 11a to the extent of BPT when there are no other credits in the return.

New Hampshire DP-10 and BT-Summary returns now print the paid preparer's PTIN instead of the firm's EIN if a PTIN has been entered.

Form BET-80 no longer prints when apportionment is 100%.

The full government copy of the NH BT-Summary return now prints when e-file is turned off.

New Hampshire Electronic Filing

New Hampshire disqualifying diagnostic 60210 now issues when a state code is present for Business Locations Outside NH on Form ADDLINFO but a city name is missing.

New Hampshire Form DP-132, Line 11 now totals the columns appropriately per entity.

New York

Form IT-201-V includes the spouse's first name and last name when Form IT-203-C is filed with the spouse as the NYS income earner.

Form IT-201, Line 51 calculates correctly when itemized deductions subject to 2% are present.

Oregon - Multnomah/Portland/TriMet

Annual exemption report prints if the residential rental exemption is met.

South Carolina

Schedule NR includes Federal DPAD on Line 29 and Form 461 amounts as other income on Line 15.

Utah

Utah Form TC-831 now has the option for preparer to electronically sign the form. Also, the paid preparer's PTIN now populates when this information is entered on the paid preparer's input/worksheet.

Virginia

Schedule A, Line 16 calculates from applicable federal input for non-residents and part-year residents.

West Virginia

IRA contributions for non-residents and part-year residents show up on Line 21 of Schedule A.
Schedule A part year dates print.

Partnership (1065) Product Updates

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Federal

Form 1065, Page 4, Line 17a, now matches the AMT depreciation report when assets have opted out of 163(j).

Heading of custom filing instructions for Form 8752 is revised to match the title on the form.

Interview Form O-7 will print when printing of input forms is selected.

Opting out of 163(j) to change real property assets to ADS is now allowed for multiple "Other" and "COGS" depreciation entities.

The Partner basis worksheet Line 14C, input override will carry to the partner's basis worksheet when the partner numbers are not entered in a sequential order.

Electronic Filing

Disqualifying diagnostic 41098 will not issue when the partnership representative is a Grantor Trust with an FEIN and the designated individual information section on Form 1065, Schedule B has also been completed.

Arkansas

The state and zip code will only print once for the Principal Office Information (in Arkansas) on the Arkansas Annual Report.

When using Totals COGS depreciation, the depreciation amount will not be included in the calculation of amortization. This will affect the amount shown on Form AR1050, Schedule B, Part I, Line 4.

Delaware

Delaware 300, Schedule K-1, Line 14, other income, includes other income items from the Federal K-1, Line 11, other income, item codes F, G, and H.

District of Columbia Electronic Filing

An adjustment has been made to ensure the sales account number on the Schedule SR is a valid number.

Schedule SR will not generate in the return if federal gross receipts are above the limit required by the credit.

The designee name and phone number will be included when the third party designee is checked on the Partnership D-65 return.

Louisiana

Guaranteed payments to partners will allocate to the receiving partners on Line 1 of the Schedule K-1 equivalent.

When Louisiana calculates 0% apportionment, the amounts on Lines 1 and 5 of the Schedule K-1 will calculate based on 0% apportionment.

Maine

Maine Schedule 1040C-ME filing address has been updated in letters and filing instructions to Maine Revenue Services, P.O. Box 1066, Augusta, ME 04332-1066 for a refund return and Maine Revenue Services, P.O. Box 1067, Augusta, ME 04332-1067 for a balance due return.

Minnesota

Minnesota NC 4562 will print with the state return.

Schedule KPI, Line 35, will match Line 2 on Form M3.

Montana

Form PR-1, Line 13e will not include disallowed business interest from Federal Schedule K, Other Deductions line.

Nebraska

Schedule A, Line 17 will not include the disallowed business interest expense from Federal Schedule K, Line 13d.

Ohio

Diagnostic 22512 will now reference the correct schedule and line number on Form IT 1140.

The Filing Instructions for Form OH IT1140ES will show the correct due dates for the 2nd and 3rd installment payments.

Ohio - Ohio Cities

RITA pre and post apportionment NOL calculations have been adjusted according to instructions and feedback from the taxing authority during the electronic filing approval process. These adjustments will continue through the completion of the approval process.

Oregon

OR-65, Line 6A will automatically check whether Schedule OR-AP is present.

Rhode Island

The RI 1099-PT will be included in the K-1 copy.

South Carolina

The underpayment penalty will no longer flow to Form SC 1040 when no penalty is required to be paid.

Utah

Form TC65, Utah Partnership/Limited Liability Partnership/Limited Liability Company Return. Line 10 (Penalties and Interest) will no longer calculate if a return is an amended return per Publication 58.

Utah Schedule N, Passthrough Entity Withholding Tax. Resident trust partner will now show correctly.

Vermont

The amount for 1231 gains and losses will now only be included in Line 6 on Forms BI-472/BI-473 and will no longer be included on Form BI-472, Line 12 or Form BI-473, Line 13.

Virginia

Virginia Form 770IP extension letter will now present the correct mailing information when the electronic funds transfer threshold is met.

West Virginia

Suppression of Schedule K-1 and K-1C will honor the options to suppress or not suppress the state K-1.

The supporting statements for Schedule K-1 will be collated behind the appropriate K-1.

Wisconsin

Form 3, Line 12 will now use the calculated amount between ordinary income and the state's Section 179 amount.

New Wisconsin Form 3-ES has been installed. This form has been approved by Wisconsin for release 2018.03050 (delivers to customers on May 19th, 2019). For tax year 2018, input is available on the form and these amounts will proforma to tax year 2019.

The amount on Federal Form 1065, Line 13K for excess business interest expense will now flow to Form 3K-1, Line 13.

Corporation (1120) Product Updates

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Federal

Schedule M-1 is now adjusted by carryover of disallowed business interest expense from prior year.

The state annual report separate transmittal letter will be generated when the separate state return extension letter is generated.

"2017 Tax Year" lines on Form 965, and Schedules G and H can now be completed from the following input:

- Form 965 Part I, Line 4 - input on Sec 965 > 4-Schedule A > Sec 965(a) taken in 2017 tax year (Interview Form FRI-5, Box 72, etc.)
- Form 965 Part I, Line 5 - input on Sec 965 > 8-Schedules F, G and H > Sec 965(a) inclusion in U.S. dollars (Interview Form FRI-9, Box 81, etc.)
- Form 965 Part II, Section 1, Lines 18 through 28 - automatically carried/calculated by the system
- Form 965 Part II, Section 2, Lines 2a through 2c - automatically carried/calculated by the system
- Schedule G - enter on worksheet Sec 965 > 8-Schedules F, G and H with "2017" as the year (Interview Form FRI-9 with "2017" in Box 35, etc.)
- Schedule H, Lines 15 through 28 - automatically carried/calculated by the system
- Schedule H, Lines 38 through 46 - automatically carried/calculated by the system

District of Columbia Electronic Filing

The electronic filing status system will now indicate that direct debit information has been included with the extension when there is an amount due with extension, but no amount due on the main return. If banking information is noted in the filing instructions and on the direct debit report, then the payment is included and being made via the electronic file.

Maryland Electronic Filing

Form 500CR, Page 6, Part Y, Line 2 amount is present for the Apprentice Credit and the required PDF is attached using Federal > Electronic Filing > PDF Attachments - Required (Interview Form EF-PDF1) with a code of "24" the PDF all components will be present in the Maryland electronic file.

Minnesota

Schedule LK, Line 23 will fill with the calculated gain/loss from the federal return. An input field is available on Federal > Income/Deductions > 8824 - Like Kind Exchanges > Basis and Fair Market Value > State amount 3 field (Interview Form D-6, Box 102) to override the calculated value for Line 23.

Montana

A NOL can be entered for the top level in a Montana consolidated return.

Ohio - Ohio Cities

RITA pre and post apportionment NOL calculations have been adjusted according to instructions and feedback from the taxing authority during the electronic filing approval process. These adjustments will continue through the completion of the approval process.

Oregon

A dividend received subtraction is now calculated for gross Section 965 income. This subtraction prints on Schedule OR-ASC-CORP with code 377.

Calculated extension amount no longer prints on Extension Report in column "Tax deposited with extension on return" if Extensions > Automatically carry extension payment amount to return > No is selected (Interview Form EXT-1, Box 48 = N).

Extension payments on OR-20, Page 3, Line 6 for consolidated returns now include extension payments made for separate returns.

Letters and Instructions for Multnomah County and Portland now reflect the Date filed if after due date if entered on Penalties > Federal Late Penalty and Interest > Date filed if after due date (Interview Form 1, Box 57).

Updated FEIN field on Oregon Schedule AP and Portland Schedule R to print "Applied for" if 99-9999999 has been entered.

Additions and subtractions of a subsidiary return that has been excluded from the OR unitary return no longer flow up to unitary return.

Utah

Form TC-65, Schedule K-1 will be available for electronic filing.

Vermont Electronic Filing

The number of W-2's issued will be filled in the electronic file for any return claiming salaries and wages and having input for the number of W-2's issued on Federal > General > Electronic Filing > Filing Security Information > Number of W-2's issued field (Interview Form EF-4, Box 31).

Virginia

Virginia Form 500HS - Home Service Contract Providers has been added.

Input can be found on Virginia > Virginia Corporate Return > Electric Supplier and Telecommunications Companies > Home Service Contract Provider, Section 3 (Interview Form VA10).

Form 500HS is available for electronic filing.

S Corporation (1120S) Product Updates

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Federal

Section 179 expense is now included in Line 11 of Form 8990 for computation of adjusted taxable income.

Connecticut

Form CT-1065/CT-1120SI, Page 3, Part I, Schedule B, Line 10 will no longer include the gain from disposition of assets with Section 179.

Hawaii

Schedule K-1 and Form N-4 will honor the option for partial masking of EIN/SSN where the last 4 characters may be displayed.

Illinois

Schedule NB, Lines 7 and 8, Column B will now be reduced by the portion of each amount that is allocated to shareholders who are subject to the replacement tax.

Louisiana Electronic Filing

Form 8453-C for the extension will now print when the extension is exported for electronic filing.

Maine

Maine composite Schedule 1040C-ME filing address has been updated for letters and filing instructions to Maine Revenue Services, P.O. Box 1066, Augusta, ME 04332-1066 for a refund return and Maine Revenue Services, P.O. Box 1067, Augusta, ME 04332-1067 for a balance due return.

Mississippi

When extension Form 83-180 is generated for Mississippi and electronic filing is selected for extension, but no banking information or electronic funds transfer (EFT) options are selected, the extension filing instructions will show the correct address to mail the extension payment.

Montana

The input for qualified endowment credit has been reactivated.

The number of Other Types of Shareholders on CLT-4S will reflect the accurate number of shareholders when there are foreign shareholders.

Ohio - Ohio Cities

The estimate reminder letter for Form MNP ES will now indicate that payment needs to be made to the Ohio Department of Taxation.

The letters and filing instructions for Columbus Form BR25 will no longer state to send in a payment when the balance due is less than \$10.

RITA pre and post apportionment NOL calculations have been adjusted according to instructions and feedback from the taxing authority during the electronic filing approval process. These adjustments will continue through the completion of the approval process.

Oklahoma Electronic Filing

Form 512-S-X, Amended Return Schedule. Information on Form 512-S-X, Line C will now show correctly on government copy.

Oregon

Form SC-2018, Combined Tax Return for Multnomah County and City of Portland, Signature of Preparer has been updated to fill when selected in the Signature Block section in Configure Applications > Tax Preparation in Office Manager.

Utah

Late filing penalties and late payment penalties will no longer be calculated for amended returns.

Form TC-559 payment coupon will no longer print if electronic fund transfer is selected.

Vermont

An extension letter will not produce unless either the federal extension or Vermont extension is present in the return.

Wisconsin

An extension payment will no longer calculate for Form 5S when no payment is due and the extension is locked.

Form PW-ES vouchers will be prepared but will no longer print when paid using electronic funds transfer (EFT).

The tax withheld on Form 5S and Form 5K-1, Line 13j will no longer include withholding for nonresident shareholders with passthrough income less than \$1000.

Fiduciary (1041) Product Updates

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Georgia

Form 501, Schedule 3, Additions, Line 5a add back for state and local taxes excludes Georgia income taxes claimed as a deduction on the federal return, and the corresponding statement description has been changed accordingly.

Illinois

Illinois extension letter shows PO Box 19053 for the extension voucher.

Iowa

IA 1041, Line 23 - Tax will now be calculated after the qualified business income deduction is subtracted from Form 1041, Line 15 - Other deductions not subject to 2% floor. Also, an override of taxes entered on the State Source Allowable Deductions - Overrides section (Interview Form ST-1, Box 61) will not be double counted in total deductions prior to calculating the tax.

Estate and Gift (706/709) Product Updates

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Connecticut

The following final form is available for dates of death in 2019:

- Form CT-706/709 EXT

Exempt Organization (990) Product Updates

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Virginia

Virginia Updates for Conformity Changes Published March, 2019.

Federal Form 8990 (Business Interest Deduction) Reaction:

- New subtraction code "65" has been added for Schedule 500ADJ.
- The system will automatically create this code with 20% of the disallowed interest expense from Form 8990, Line 31. 80% of the disallowed interest expense will show on the carryover report.
- Code "65" can also be input on Virginia > Virginia Corporation Return > Income/Deductions > Subtraction (Interview Form VA2) which will create an additional entry on Schedule 500ADJ.
- Code "65" information will flow to Schedule 500ADJ.
- Code VA17 has been added to Federal > General > Electronic Filing > PDF Attachment - Required (Interview Form EF-PDF1, PDF Attachments: Specific Forms) to allow federal Form 8990 to be attached as a PDF.

Federal Form 8992/8993 (GILTI) Reaction:

- The calculated amount from Federal Form 8992, Line 3 less Federal Form 8993 Lines 8 + 9 will flow to Schedule 500ADJ, Section B subtractions, Line 6.
- An input override has been added on Virginia > Virginia Corporation Return > Income/Deductions > Subtractions > Global Intangible Low-Taxed Income (Interview Form VA2, Box 57). This information will flow to Schedule 500ADJ.