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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 <u>Application Status</u> 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 2019 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/Recall, Organizer, technology enhancements)
- Updates made to Tax products (form additions and updates, diagnostic updates, changes caused by regulatory updates)

Tax Updates

All Systems - PTIN Verification (Included with Release 2019.02000)

As part of the ongoing IRS security rules, all PTINs must be verified for accuracy. The verification process takes place only one time and will not apply to future logins.

PTINs can be verified through:

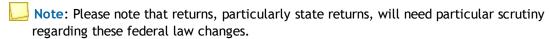
- Initial login to Tax
- Office Manager > Configure Staff
- Office Manager > Configure Applications > Signature Block
- Office Manager > Electronic Filing Options > Electronic Return Originator (ERO) Overrides

If a user logs in without confirming their PTIN, they will be required to confirm their PTIN on subsequent logins. Users who do not have a PTIN saved with their staff profile in Configure Staff will not receive the confirmation PTIN message during login.

Warning and electronic filing diagnostics have been added to alert preparers that their PTIN has not been verified depending on the return being electronically or paper filed.

All Systems - Consolidated Appropriations Act of 2020

Those provisions of the Consolidated Appropriations Act of 2020 that can be implemented without IRS action will be available on Release 2019.02020, scheduled for January 19, 2020. Returns with these provisions will have updated calculations, but will continue to be unavailable for electronic filing, pending IRS changes. The IRS is yet to announce plans regarding availability of either updated forms and electronic filing schemas for tax year 2018 or tax year 2019.



Electronic Filing Updates

We will begin accepting returns in advance of the January 27, 2020, IRS open for Individual returns. Returns involving the recently passed Consolidated Appropriations Act of 2020 or other open items will continue to disqualify, but qualified returns can be uploaded and released, and will be transmitted to the IRS on January 27, 2020.

Approved Products Available on this Release

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

Individual

Federal Colorado Extension New York Extension
Federal Extension Hawaii New York Form IT-210
FRAP (Form 114)

FBAR (Form 114) Iowa Ohio
Arizona Kansas Oklahoma
Arizona Extension Maryland West Virginia

Colorado New York

Corporation

FederalMaineTennessee 188ArkansasMarylandTennessee EstimatesCalifornia ExtensionMontanaTennessee Extension

Virginia

Tennessee Extension

Colorado New Mexico Utah

District of Columbia North Carolina Extension Utah Extension

IowaNorth DakotaKansasPennsylvaniaKentuckyTennessee

S Corporation

Federal Kentucky Pennsylvania RCT-101

Arkansas Maine Tennessee
Arkansas Composite Maryland Tennessee 188

California Extension Missouri Tennessee Estimates
Colorado New Mexico PTW-D Tennessee Extension

District of Columbia North Carolina Extension Utah

Iowa North Dakota Utah Extension

Kansas Pennsylvania

Partnership

FederalNew JerseyTennesseeArkansasNew Jersey CBTTennessee 188Arkansas CompositeNew Jersey EstimatesTennessee 250

Colorado New Mexico Tennessee 251 Extension
District of Columbia New Mexico PTW-D Tennessee Estimates

Kansas Oregon Utah

Kentucky Oregon Composite Utah Extension

North Dakota

Maine Oregon Lane County Virginia

Maryland Oregon Tri-County Missouri Pennsylvania

Exempt Organization

Iowa

Federal Florida Extension

DataScan Plus

You can now create queries and scan 2019 returns. System defined keywords and scans for 2019 will be available on an upcoming release.

Product Updates

S Corporation (1120S) Product Updates

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Federal

On the Analysis of Shareholder's Loan Accounts, the Loans Made During Year column will now factor in to the calculation for the Gain from Loan Repayment. The new calculation of Column K is now (Column(C) minus Column(F)) divided by (Column(B) plus Column(E)) multiplied by Column (J).

We are currently awaiting guidance from the IRS regarding how aggregated 199A amounts should be reported on the shareholder's return. Without a more definitive answer, aggregated Sec 199A activities will not be included in the export of Schedule K-1 Information to other returns. We will have this information included in the export on a later release.

Partnership (1065) Product Updates

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Federal

We are currently awaiting guidance from the IRS regarding how aggregated 199A amounts should be reported on the partner's return. Without a more definitive answer, aggregated Sec 199A activities will not be included in the export of Schedule K-1 Information to other returns. We will have this information included in the export on a later release.