

CCH® ProSystem fx® Tax

2019.03030

Release Notes

March 29, 2020



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## Contact and Support Information

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Product and account information can be accessed by visiting Customer Support online at [support.cch.com](http://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 Release Notes

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CCH® ProSystem fx® 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)

To access a list of CCH ProSystem fx Tax Release Notes for the current year and for prior years, visit the [Release Notes](#) page on our Customer Support site.

## Highlights for Release 2019.03030

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### Tax Updates

Changes related to the Federal and state due date changes will be available on the next release. Until that time, refer to our March 25, 2020, CCH Software News that outlines how to manually adjust relevant fields to account for the extended deadline.

With this release, new override codes are needed for each system. On Sunday, March 29, please change the override codes as follows:

- Individual - Wisteria
- Corporation - olive11
- Fiduciary - Brie

### All Systems

Form 8844 is now available.

## Tax Product Updates

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### Corporation (1120) Product Updates

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#### Missouri

State refund worksheet will now show refunds for Forms INT-2 and INT-3.

## S Corporation (1120S) Product Updates

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### Federal

Mailing Address. If the S Corporation has a Vermont address, less than \$10,000,000 in assets, and does not file Schedule M-3, the mailing address will be the Kansas City, MO processing center.

### New Jersey

Form CBT-100, Page 2, Lines 14 and 16 carries from entries on New Jersey > Corporation > General > Members/Affiliates and Annual General Questionnaire > Lines 21 - 22, 33 and 35 (Interview Form NJ1A, Boxes 71 - 74).

### Wisconsin

The WI estimate form CORP-ES will now include the entity level tax from Form 5S-ET, Line 17. (Included with release 2019.03020)

# Partnership (1065) Product Updates

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## Federal

Form 1065: The supporting statements for the partnership return will be collated at the end of the return.

Form 5471, Schedule E-1, Line 7 calculates correctly when Line 7 should be 0.

Federal Schedule K-1, Line H-2, Disregarded Entity Name and TIN, presentation on state Schedules K-1:

Input for disregarded entity information is available on Federal > Partners > Partner Information (Detail) > DE's Information / Section 704(c) Gain(Loss) / Other Options > Disregarded entity name or first name, disregarded entity last name, disregarded entity Tax ID number, and partner entity type (Form K-1A, Boxes 31, 32, 114, and 115).

This is how each state is handling it:

- AK - Owner of DE as partner
- AL - Waiting on word from state, no action taken
- AR - Owner of DE as partner
- AZ - Owner of DE as partner
- CA - Waiting on word from state, no action taken
- CO - Schedule K-1 equivalent, no action taken
- CT - Owner of DE as partner
- DC - Schedule K-1 equivalent, no action taken
- DE - Waiting on word from state, no action taken
- FL - Schedule K-1 equivalent, no action taken
- GA - Schedule K-1 equivalent, no action taken
- HI - Owner of DE as partner
- IA - Owner of DE as partner
- ID - Waiting on word from state, no action taken
- IL - DE as partner, includes lines for DE/Grantor trust owner information
- IN - No reaction (state may provide updated K-1, no ETA)
- KS - Schedule K-1 equivalent, no action taken
- KY - Owner of DE as partner
- LA - Waiting on word from state, no action taken
- MA - Owner of DE as partner, WIP
- MD - Owner of DE as partner, DE information included on Schedule K-1, Page 3, Schedule G
- ME - Schedule K-1 equivalent, no action taken
- MI - No Schedule K-1
- MN - DE as partner, also a field for owner TIN (but none for owner name)
- MO - Owner of DE as partner
- MS - Owner of DE as partner
- MT - DE as partner
- NC - Owner of DE as partner

- ND - Owner of DE as partner
- NE - Owner of DE as partner
- NH - No Schedule K-1
- NJ - Owner of DE as partner
- NM - Schedule K-1 equivalent, no action taken
- NV - No Schedule K-1
- NY - DE as partner
- NYC - Schedule K-1 equivalent, no action taken
- OH - Owner of DE as partner
- OK - Schedule K-1 equivalent, no action taken
- OR - Schedule K-1 for Individual partners only
- PA - Reaction WIP, utilizing new input
- RI - Waiting on word from state, no action taken
- SC - Waiting on word from state, no action taken
- TN - No Schedule K-1
- TX - No Schedule K-1
- UT - Waiting on word from state, no action taken
- VA - Owner of DE as partner
- VT - Waiting on word from state, no action taken
- WI - DE as partner
- WV - Waiting on word from state, no action taken

Federal Schedule K-1, Lines 11F and 13V, Section 743(b), presentation on state Schedules K-1:

- AK - Not represented on Schedule K-1
- AL - Schedule K-1, Line L or Q
- AR - Not represented on Schedule K-1, no word from state
- AZ - Not represented on Schedule K-1
- CA - Schedule K-1, Line 11b or 13e, Federal column, adjusted out in Column c
- CO - Included in the calculation of state income
- CT - Reported in the calculation of income on Line 11 or 13 of main form and on Schedule K-1, Line 11 or 13
- DC - Adjustments reflected on balance sheet the same way as federal. Gains and losses reported on Line 9 with a statement
- DE - Included on Schedule K-1, Line 11
- FL - Not represented on Schedule K-1
- GA - Not represented on Schedule K-1 equivalent, no word from state
- HI - Included on Schedule K-1, WIP
- IA - Included on Schedule K-1, Line 16
- ID - Schedule K-1, Line 14
- IL - Sch K-1, Line 31
- IN - Schedule K-1, Line 11 or 13, no word from state
- KS - Included in calculation of Form K-120S
- KY - Not represented on Schedule K-1, no word from state



- LA - Form 565, Schedule P or S (depending on partner type), Line 7 or 11, no word from state
- MA - Schedule K-1, Line 26 or Line 27
- MD - 11F included on Schedule K-1, Line 1, 13v not included, no word from state
- ME - Schedule K-1, Line 7 or Lines 22 and 27
- MI - No Schedule K-1, not included on return
- MI Cities - Schedules K-1, Line 11 or Line 13
- MN - Included in calculation of MN source income on Schedule K-1, as applicable
- MO - MO-NRP, Line 11 or 13d
- MS - Schedule K-1, Line 11 or 14
- MT - Not represented on Schedule K-1
- NC - Adjustment included on Schedule K-1, Line 1
- ND - Schedule K-1, Part 4, Line 35 or 37
- NE - Included on Schedule A, Line 7 or 17
- NH - Not represented on Schedule K-1, no word from state
- NJ - Not represented on Schedule K-1, no word from state
- NM - Not represented on Schedule K-1, no word from state
- NV - No Schedule K-1, not included on return
- NY - Included on IT-204, Page 6, Line 97 or 99, IT-204-IP, Page 2, Line 11 or 13, IT-204-CP, Page 7, Line 54 or 56
- NYC - Schedule K-1 equivalent, Line 6 or Line 7, no word from city
- OH - 11F included on Schedule K-1, Line 1a, 13v not included
- OK - Schedule K-1, Line 1
- OR - Schedule K-1, Line 11 or Line 13
- PA - Not represented on Schedule K-1
- PHI - No Schedule K-1, not included on return
- RI - 11F included on Schedule K-1, Line 5, 13v not included, no word from state
- SC - Included on Schedule K-1
- TN - No Schedule K-1, not included on return
- TX - No Schedule K-1, not included on return
- UT - Schedule K-1, Line 12 or 16
- VA - Included on Schedule K-1, Line 1 or 2
- VT - Not represented on Schedule K-1, no word from state
- WI - Included on Schedule K-1, Line 11 or 13
- WV - Not represented on Schedule K-1, no word from state

(Included with release 2019.03020)

## Fiduciary (1041) Product Updates

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### Kansas Electronic Filing

The mailing address properly reflects where to mail the vouchers when the return is being e-filed and payment is being mailed.