

CCH® ProSystem fx® Tax

2019.03033

Release Notes

April 19, 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 2019.03033

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### Tax Updates

#### All Systems

IRS Notice 2020-23 extended due dates for multiple forms due between April 1, 2020, and July 14, 2020, including second quarter estimate payments. Calendar year updates are available with this release; fiscal year updates will be available in release 2019.03040 on April 26, 2020.

Letters and filing instructions now reflect extended due dates for federal and state estimates in an orderly fashion; the disorder was created by the revised arrangement of the estimate payment dates.


The IRS and various taxing authorities have indicated that paper returns are not being processed at this time, so refunds will be delayed. No contact or inquiry with these taxing authorities is needed, as the processing will recommence in the future.

CARES Act changes for tax year 2018 and tax year 2019 will be available in release 2019.03040. Timing of the changes for tax year 2017 remains in planning.

### Electronic Filing Updates

#### Individual

**Federal** - The IRS is now requesting that the first estimate payment withdrawal date in the electronic file be July 15, 2020, instead of April 15, 2020, when electronically filing federal estimates. Please recalculate and resubmit with release 2019.03031 or later. You can also choose to paper file the federal estimates instead. Please wait until 2019.03033 if the second estimate should be withdrawn on July 15, 2020, as well.

 **Note:** The IRS is not accepting electronically filed 1040 estimate payments using the original due dates. The option to revert to original dates should not be used in conjunction with 1040 electronically filed estimates.

#### Individual and Fiduciary

**New York** - Beginning Thursday, April 9, 2020, all released 1040 and 1041 federal and state electronically filed balance due returns or estimate payments that included a post-April 15, 2020, debit date were moved to Stopped for CCH Review to prevent unexpected early debits. The New York Department of Taxation and Finance has updated its systems, but returns in this status must be re-uploaded and released to complete the transmission.

## Tax Product Updates

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### Individual (1040) Product Updates

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#### Colorado

CO 104PN, Line 18 and 19 now include gambling winnings when W2G was not received.

#### Michigan MBT

Letters and filing instructions now reflect July 15, 2020 as the second estimate date.

#### Minnesota

The 60% limit will apply to amounts input as 60% cash contributions on the Minnesota Charitable Contributions Limitation and the Charitable Contributions worksheet.

#### Missouri - St. Louis

The amount of the extension no longer flows to the return if selected to not do so in Office Manager or in the return itself.

The extension forms (E-8 and E-8S) now lock if after the due date of July 15, 2020 or selected to lock before the due date.

#### Montana

The points paid for a mortgage will carry to Form MT2, Page 7, Line 9.

#### Pennsylvania - Philadelphia

The Philadelphia Annual Reconciliation of Employee Earnings Tax due date has been extended from April 15, 2020 to July 15, 2020. Penalties and interest will be calculated from April 16, 2020.

#### Vermont

Letters and filing instructions for Form HS-122 now reflect a due date of July 15, 2020.

## Corporation (1120) Product Updates

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### Alabama

The Alabama due date for Forms 20C, 20C-C, ET-1, ET-1C, and CPT have been extended from April 15, 2020 to July 15, 2020. Penalties and interest will be calculated from July 16, 2020. First quarter estimate payments originally due April 15, 2020 are now due July 15, 2020. (Included with release 2019.03032)

### Oklahoma

Form 512 due date and payment date has been extended to August 14, 2020.

## S Corporation (1120S) Product Updates

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### Kansas

The Kansas first estimate payment due April 15, 2020 has been moved to July 15, 2020.

### Nebraska

Nebraska Forms 1120N and 1120NF with a fiscal year ending January 31, 2020 due dates have been extended from April 15, 2020 to July 15, 2020. Penalties and interest will be calculated from July 16, 2020.

## Partnership (1065) Product Updates

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### Nebraska

For fiscal year filers with a tax year end of January 31, 2020, the due date of the 1065N has been extended to July 15, 2020. Penalties and interest on the form will start calculating on July 16, 2020 for these returns.



## Fiduciary (1041) Product Updates

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### Michigan MBT

Letters and filing instructions now indicate that the Michigan business tax second estimate payment is due July 15, 2020.

### Texas

The 2020 Texas Franchise Report due date has been extended to July 15, 2020 for all 2020 report year returns including fiscal year returns. Penalties and interest will be calculated from July 16, 2020. (Included with release 2019.03032)

## Exempt Organization (990) Product Updates

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### Federal

Forms 990-PF, 990-T, 990-W and 4720 due between April 1, 2020 and July 15, 2020 are now due on July 15, 2020 for calendar year returns.

## Estate & Gift (706/709) Product Updates

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### Federal

For the following forms, the due date for filing and making payments due on or after April 1, 2020 and before July 15, 2020 is automatically postponed to July 15, 2020, in accordance with IRS Notice 2020-23:

- Form 706
- Form 706-NA
- Form 8971
- Form 709 due on the date an estate is required to file Form 706 or Form 706-NA