

CCH® ProSystem fx® Tax

2019.06010

Release Notes

July 25, 2021



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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. 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 2019.06010

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Tax Updates

Partnership

A fully calculating version of Federal Form 8985, Pass-Through Statement - Transmittal/Partnership Adjustment Tracking Report and Form 8986, Partner's Share of Adjustment(s) to Partnership-Related Item(s) is available for processing. See the *Partnership (1065) Product Updates* on page 8 for details.

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 1045, filing by fax is no longer available. Form 1045 should be filed by mailing to the appropriate Internal Revenue Service Center.

Form 1116.

- Capital gains in the re-sourced by treaty basket are presented on Form 1116, Line 1a when the foreign branch basket is also present in the return.
- Percentage entered for recapture of overall domestic losses on the Foreign Tax Credit > Other (Interview Form P-3A, Box 70) is only applied to losses prior to 2018 and losses prior to 2012.

Corporation (1120) Product Updates

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Pennsylvania - Philadelphia

Diagnostic 48184 has been reactivated to disqualify amended returns from e-file. Philadelphia does not allow e-file of amended returns.

S Corporation (1120S) Product Updates

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Pennsylvania Electronic Filing

The diagnostic 48184 has been installed to disqualify the amended return for electronic filing.

Partnership (1065) Product Updates

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Federal

A calculated version of Forms 8985 and 8986 has been added on releases 2020.04010 and 2019.06010. This version will allow multiple entities of Form 8986 so the form can be generated for each applicable partner. New input is available on Other > Form 8985 Transmittal/Partnership Adjustment Tracking Record (Interview Forms X-10 through X-14). Form 8985 will be generated based on this input. Form 8986 can be generated in two different ways.

- Option 1 - To generate the form for all partners, check the box to Produce Form 8986 for all partners on Other > Form 8985 Transmittal/Partnership Adjustment Tracking Record > Form 8985 General and Signature Information (Interview Form X-14, Box 30).
- Option 2 - To prepare the form for specific partners on Other > Form 8985 Transmittal/Partnership Adjustment Tracking Record > Form 8986 Information About the Partner (Interview Form X-14). This section can also be used to exclude specific partners when the option to prepare Form 8986 for all partners is used. Form 8985 Part IV/Form 8986 Part V input is available on the Other > Form 8985 Transmittal/Partnership Adjustment Tracking Record > Form 8985 Partners Total Reviewed Income (Interview Form X-12). By default, these entries will be allocated to Form 8986 based on the percentages given on the partners' federal Schedules K-1. Ratio ID allocation is available to specially allocate these amounts.

These forms will be included in the letters and filing instructions when they are produced from the new input. A separate federal letter will be prepared based on the input General > Letters and Filing Instructions > Transmittal Letter > Prepare separate letters for certain federal forms (Interview Form 7, Box 42). The normal inputs for standard and custom filing instructions and other applicable transmittal letter input will also apply.

Pennsylvania - Philadelphia

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