

CCH® ProSystem fx® Tax

2020.05091

Release Notes

March 6, 2022



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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 2020.05091

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Tax Updates

Individual

Form 8915-E. Lines 9 and 17 now pro forma to IRAs, Pensions and Annuities (IRS 1099-R) > 8915F - Qualified Disaster Retirement Plan (Interview Form M-27) only when there is an election to spread the taxable amount over three years. Pro Forma on the Fly will be available to adjust these amounts directly in Tax Year 2021 returns on a future release.

Electronic Filing Updates

Approved Products Available on this Release

The following products are approved and available on this release:

Individual

Kentucky Amended

S Corporation

Ohio - Fiscal year Electronic Filing is available

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 8915-E. Lines 9 and 17 now pro forma to IRAs, Pensions and Annuities (IRS 1099-R) > 8915F - Qualified Disaster Retirement Plan (Interview Form M-27) only when "Elect not to spread the taxable amount over three years" is not checked.

S Corporation (1120S) Product Updates

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Ohio

Ohio electronic filing for fiscal returns ending in tax year 2021 is available.

Fiduciary (1041) Product Updates

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Federal - Foreign Financial Assets

An account number will populate on Form 8938, Part V if it had not prior to this release.