

CCH® ProSystem fx® Tax

2021.02020

Release Notes

January 23, 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 2021.02020

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Tax Updates

IRS E-File Opening: In response to IRS electronic filing opening for Individual returns on Monday, January 24, 2022, we will also open for qualified Individual returns. We are also open for Fiduciary return filing now. See 2021 Electronic Filing section for details.

Individual - Federal and state updates related to major revisions of federal forms are ongoing. Please refer to the Forms Release Status for form availability.

Unapproved Forms for Selected States Cannot be Printed - Several states implemented new requirements for Tax Year 2021. Forms that have not been approved by the taxing authority cannot be printed from the software. Due to that requirement, electronic filing is also unavailable since a tax return cannot be produced for a taxpayer to review. These changes affect unapproved forms in **all systems** for the following states:

Arkansas	Mississippi
California	Montana
Connecticut	New York
District of Columbia	Pennsylvania
Georgia	South Carolina
Indiana	Texas
Kansas	Vermont
Michigan	Virginia
Minnesota	

Electronic Filing Updates

Individual

The IRS has announced that electronic filing for Individual returns opens on Monday, January 24, 2022.

We will begin allowing upload and release of qualified Individual returns on Monday, January 24, 2022 at 9 a.m. CST.

Fiduciary

The IRS is open for Fiduciary return filing. Qualified Fiduciary returns can be uploaded and released on Sunday, January 23, 2022.

Approved Products Available on this Release

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

Individual

Federal	Idaho
Federal 2350	Ohio
Federal 4868	Pennsylvania
Federal Form 114 (FBAR)	Pennsylvania Extension
Georgia	Utah

Corporation

Federal	Montana	Tennessee Extension
Arkansas	Pennsylvania	Tennessee 188
Arizona	Pennsylvania Extension	Utah
Mississippi	Tennessee	Virginia

S Corporation

Maine	Pennsylvania RCT 101
Mississippi	Virginia
Mississippi Extension	

Partnership

Federal	Mississippi Extension
Mississippi	Virginia

Fiduciary

Federal	Maine	Pennsylvania Extension
Federal 7004	Missouri	South Carolina
Federal Form 114 (FBAR)	Montana	Utah
Arkansas	New Jersey	Utah Extension
Arkansas Extension	New Jersey ESBT	Virginia
Iowa	New Jersey Extension	
Kansas	Pennsylvania	

Individual (1040) Product Updates

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Missouri

MO-A, Part 1, Lines 17Y and 17S account for the percent of federal on all pass-through input.

For a full list of affected products, see *Approved Products Available on this Release* on page 5.

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Partnership (1065) Product Updates

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Indiana

Form IT-65, The federal addback for business meals is limited to 50%.

For a full list of affected products, see *Approved Products Available on this Release* on page 5.

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Fiduciary (1041) Product Updates

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California

Form **3804-CR**, Pass-Through Entity Elective Tax Credit is now available.

Worksheet View entries can be made in:

- Partnership Passthrough (IRS K-1 1065) > Activity > State passthrough entity credit
- S Corporation Passthrough (IRS K-1 1120S) > Activity > State passthrough entity credit
- Fiduciary Passthrough (IRS K-1 1041) > Activity > State passthrough entity credit
- California > Credits > Other and Schedule P Credits > Passthrough Entity Elective Tax - Override Interview

Interview Form entries can be made in:

- Interview Form O-3, Box 39
- Interview Form O-9, Box 226
- Interview Form IRS K-1 (1065), Boxes 281 and 596
- Interview Form IRS K-1(1120S), Boxes 226 and 586
- Interview Form IRS K-1(1041), Boxes 139 and 452
- Interview Form CA2, Boxes 57 through 80

For a full list of affected products, see *Approved Products Available on this Release* on page 5.

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Estate & Gift (706/709) Product Updates

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Oregon

The following Oregon forms have been added as library forms for data entry use only:

- Form OR-706
- Form 4768

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