

CCH® ProSystem fx® Tax

2021.02030

Release Notes

January 30, 2022



<b>Contact and Support Information</b>	<b>2</b>
<b>Information in Tax Release Notes</b>	<b>3</b>
<b>Highlights for Release 2021.02030</b>	<b>4</b>
Tax Updates .....	4
Electronic Filing Updates .....	6
Partnership (1065) Product Updates .....	8
Fiduciary (1041) Product Updates .....	9
Estate & Gift (706/709) Product Updates .....	10

## Contact and Support Information

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[Return to Table of Contents.](#)

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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[Return to Table of Contents.](#)

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 2021.02030

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Return to [Table of Contents](#).

### Tax Updates

#### Popular Federal Forms Available for Electronic Filing in this Release Federal

**Individual:** Schedule EIC, Schedule 8812, Schedule A, Schedule B, Form 2441, Form 4835

**Corporation:** Federal 1120 Consolidated

**Partnership:** Schedule M-3

A more comprehensive list can be found under *Electronic Filing Updates* on page 6.

#### Important Information Concerning Form 8839 Qualified Adoption Expenses

We are aware of an issue with the IRS electronic filing schema concerning the maximum adoption credit allowed on **Form 8839 Qualified Adoption Expenses**. Per the 2021 form and instructions, the maximum allowable credit is \$14,440; however, the IRS schema has this value set as \$14,400 (a \$40 difference). Although we have not yet released the form, once released, if you attempt to e-file a return with Form 8839 with the maximum allowable amount (\$14,440), a diagnostic will appear disqualifying it from e-file until the IRS updates the schema (tentatively scheduled for mid-March). The IRS has advised for customers to hold these returns until the e-file schema is fixed.

## Update on States Requiring Software to Prevent Form Printing & E-filing Prior to Approval

As we've communicated previously, selected states established new requirements for tax year 2021 for software vendors to prevent forms from printing if they had not been approved by the taxing authority - a requirement that makes e-filing unavailable as well. This week, some of these states provided paper-filing approval for all return types:

### Affected States

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

### Affected States - Approved Paper Filing for all Products

Kansas	Pennsylvania	Vermont
Mississippi	Texas	Virginia

Affected states who approved paper-filing may have also approved selected return types for electronic filing. Refer to Release Notes from this and/or prior Tax Year 2021 releases. You can also check the [Form Release Status](#) page on the Support Site.

## Electronic Filing Updates

### Approved Products Available on this Release

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

#### Individual

Form 2441	Alabama LLC	Tennessee FAE 183
Form 4835	New Hampshire BT-Summary	Tennessee LLC
Schedule 8812	New Hampshire BT-Summary Extension	Vermont
Schedule A	New Hampshire DP-10	Vermont Estimates
Schedule B	New Hampshire DP-10 Extension	Vermont Extension
Schedule EIC	Tennessee FAE 172	Vermont Homestead Claim
Alabama		

#### Corporation

Federal Consolidated	Kentucky Extension	New York Additional Extension
Arizona Consolidated	Maryland Extension	New York Combined Extension
California Extension	New Hampshire	New York Extension
Kentucky	New Hampshire Combined	Utah Consolidated
Kentucky Combined	New Hampshire Extension	Virginia Consolidated
Kentucky Consolidated		

#### S Corporation

Arizona	Maryland	New Hampshire Extension
California Extension	Maryland Extension	New York Additional Extension
Iowa	Maryland PTE	New York Extension
Kentucky	Maryland PTE Extension	Tennessee
Kentucky Extension	New Hampshire	

## Partnership

Iowa	New Hampshire	Pennsylvania Composite Extension
Kentucky	New Hampshire DP-10	Pennsylvania Extension
Kentucky Extension	New Hampshire DP-10 Extension	Pennsylvania PA 65 Corp Directory of Partners
Maryland	New Hampshire Extension	Tennessee
Maryland Extension	North Dakota	Tennessee 188
Maryland PTE	Pennsylvania	Tennessee Extension
Maryland PTE Extension	Pennsylvania Composite	Utah

## Fiduciary

Arizona	Minnesota	Oklahoma
Arizona Extension	Mississippi	Oregon
Delaware	New Hampshire BT-Summary	Rhode Island
Delaware Extension	New Hampshire BT-Summary Extension	Vermont
Georgia	New Hampshire DP-10	Vermont Extension
Idaho	New Hampshire DP-10 Extension	Wisconsin
Kentucky	Ohio	Wisconsin Closing Certificate
Kentucky Extension	Ohio Passthrough Entity	Wisconsin Passthrough Entity

## Partnership (1065) Product Updates

Return to [Table of Contents](#).

### Minnesota

**Schedule KPINC/KPCNC**, business meals will be included at 50% of the Federal total.



## Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

### Federal

**Form 7203**, is available to be filed in the 1041 system as a library form only. Entries must be made on Form 7203 itself and appropriate totals will calculate.

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

Return to [Table of Contents](#).

### Federal

**Form 709.** When prior year gifts total over \$500,000, the Schedule B Column C Worksheet prints with Form 709.