

CCH® ProSystem fx® Tax

2021.03021

Release Notes

March 30, 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](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 2021.03021

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### Tax Updates

#### Individual

**Alabama** - Alabama has changed the federal tax deduction to include child tax, earned income and dependent care credits. The revised calculations and associated schema are now available. Alabama returns in Ready to Release status will be moved to Stopped for State Schema Change if released on the old schema version. Alabama 1040 returns will need to be recalculated and resubmitted on this release if released on the old schema version. Alabama DOR indicates completed returns electronically filed with the current version of the schema will be automatically recalculated to reflect the new federal tax deduction. Amended returns must be filed if paper filing.

**Arizona** - Arizona Proposition 208 was struck down as unconstitutional, so the high income surcharge has been revoked for the Arizona Individual tax return. Based on the information provided, no reaction is necessary for taxpayers who have already filed. The surcharge is revoked and the regular tax rate has been restored to the original 4.5%. This means there will be no net difference in tax. Amended returns are not necessary. Arizona DOR indicates that preparers can continue to file returns using existing forms and updated forms will be provided soon. New forms will be incorporated once they are received.

#### Individual, Corporation, Partnership, and S Corporation

**Philadelphia** - Philadelphia announced they are disabling their MeF system starting at 6:00 p.m. ET on Friday, April 1, 2022 to activate a new schema version. Program changes are available with this release. Once you update the software and recalculate returns on this new version, you will not be able to upload or release Philadelphia returns until 8:00 p.m. ET on Friday, April 1, 2022 when the new schema is activated by Philadelphia. Any returns calculated, uploaded, and released on a prior release may be filed until 8:00 p.m. ET on Friday, April 1, 2022. After April 1, 2022 at 8:00 p.m. ET, you will need to update to the latest release to electronically file your Philadelphia returns. Any returns in Ready to Release status calculated using the prior version of the schema will be moved to Stopped for State Schema Change.

### Electronic Filing Updates

#### Approved Products Available on this Release

The following products are approved and available on this release:

##### S Corporation

Oregon Portland/Multnomah Extension

##### Partnership

Oregon Portland/Multnomah Extension

# Tax Product Updates

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## Individual (1040) Product Updates

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### Alabama

Alabama has changed the federal tax deduction to include child tax, earned income and dependent care credit. This includes updating the schema used for electronic filing.

### Delaware

Charitable mileage deduction is no longer limited to \$0.17 in a few scenarios, but rather is \$0.26 for all scenarios.

### Oregon

Preparer signature date on Forms OR-40, OR-40P, and OR-40N will display a valid date.

### Philadelphia

The City of Philadelphia is activating new electronic filing specifications on Friday, April 1, 2022 at 8:00 p.m. EDT. You may continue to use the old specifications until 5:45 p.m. EDT on Friday, April 1, 2022. You must update and recalculate all Philadelphia forms on this release to electronic file Forms BIRT, BIRT-EZ, NPT, and SIT again.

**Forms BIRT / BIRT-EZ** estimates are not prepared if Final Return date is present.

### Virginia

Federal return print is not included in the Virginia copy when taxpayer and spouse (if applicable) are filing Form 763S.

### Virginia Electronic Filing

**Diagnostic 43977** issues when Form 763, Line 13 does not equal exemptions times exemption amount to prevent reject 763-145.

**Diagnostic 47655** issues when prior/subsequent state has been entered as FC and/or XX.

## S Corporation (1120S) Product Updates

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### Massachusetts

**Form 63D-ELT, Page 2, Line 10.** Refund has been updated to reduce the amount when overpayment applied has been entered.

### Oregon

Form EXT for Multnomah County/City of Portland Combined Report can now be filed electronically.

## Partnership (1065) Product Updates

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### Oregon

Form EXT for Multnomah County/City of Portland Combined Report can now be filed electronically.

## Fiduciary (1041) Product Updates

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### Iowa

Nonresident IA returns show the extension amount due in the letters.