

CCH® ProSystem fx® Tax

2021.03030

Release Notes

April 3, 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 2021.03030

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Tax Updates

Individual, Corporation, Partnership, S Corporation

Philadelphia - Philadelphia has announced that they are disabling their MeF system starting at 6:00 p.m. EDT on Friday, April 1, 2022, to activate a new schema version. Program changes were available with the Wednesday, March 30, 2022 release. Once you recalculate returns on this new version, you will not be able to upload or release Philadelphia returns until 8:00 p.m. EDT 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 5:45 p.m. EDT on Friday, April 1, 2022. After April 1, 2022 at 5:45 p.m. EDT, 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.

Individual

Form 7203AMT is available in the software. Input is available on Income > Passthrough > Basis Limitation Information (Interview Form N-1). Testing is ongoing; calculations should be reviewed thoroughly.

Individual and Fiduciary

Section 1061 Worksheets are now available. Input is available on Income > Section 1061 Worksheet A and B (Interview Form D-11).

Electronic Filing Updates

Approved Products Available on this Release

The following products are approved and available on this release:

Individual

Multnomah Form MC-40

Multnomah Form MET-40

Fiduciary

Massachusetts Form 63D-ELT

Exempt Organization

Michigan

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 1116, Schedule C, Part II, Column 12 is calculated by subtracting Column 10 from Column 11.

The Section 1061 Worksheet B has been added to support the recharacterization of capital gains. The form can be created by using input on Income > Section 1061 Worksheet A and B > Section 1061 Worksheet B Information - 1040 and 1041 Only (Interview Form D-11).

Colorado

Colorado Form DR 0104, Line 3 prints when the Federal AGI is greater than 1,000,000 on all MFJ returns.

Idaho

Form 39NR. When bonus depreciation is being claimed, Line 3(b) includes federal depreciation when federal depreciation is greater than Idaho depreciation.

Form 39NR, Line 3. The checkbox for federal passive loss limitation will only check when federal Form 8582 is calculating a passive loss limitation.

Form 39R. When bonus depreciation is being claimed, Line 5 includes federal depreciation when federal depreciation is greater than Idaho depreciation.

Form 39R, Line 5. The checkbox for federal passive loss limitation will only check when federal Form 8582 is calculating a passive loss limitation.

Maryland

Form 502CR, Part CC, Line 7. Federal AGI cannot exceed \$78,150 for filing status Married Filing Jointly and cannot exceed \$52,100 for all other filing statuses. The thresholds have been updated.

Form 505SU, Line F is limited to 3000 for one dependent and 6000 for more than one dependent.

Oregon - Multnomah/Portland/TriMet

Multnomah

- **Form MC-40 and MET-40** will now show a tax year date of 12/31/2021 in the 2D barcode.
- Preparer signature now prints on Forms MET-40, MET-40-NP, MC-40, and MC-40-NP.
- The Federal Schedule SE Automatic PDF Attachment will now properly correspond with the Multnomah returns.
- The non-resident and part-year resident versions of the Metro Supportive Housing Services and the Multnomah County Preschool For All personal income tax returns (Forms MET-40-NP and MC-40-NP) are now available. Form PIT-V extension has been added to the program for Forms MET-40/MET-40-NP and MC-40/MC-40-NP.

Partnership (1065) Product Updates

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Federal

Schedule K-1, Line 20Z, Section 199A Statement. Farm Activity Self-Employment Earnings can be overridden using Income/Deductions > Sch F/4835-Farm > Qualified Business Income - Overrides > Line 8 (Interview form QBI-4, Boxes 158 through 169).

Schedule K-2 and Schedule K-3, Part III, Section 2, Column b, Line 6a will be calculated when Column a, Line 6a is blank.

Fiduciary (1041) Product Updates

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Federal

Form 1116, Schedule C, Part II, Column 12 is calculated by subtracting Column 10 from Column 11.

Wisconsin - Electronic Filing

In an electronically filed return, if either the Part-year non-resident trust or Non-resident trust box is marked, Diagnostic 43663 will no longer issue.