

CCH® ProSystem fx® Tax

2022.02060

Release Notes

February 19, 2023



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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 2022.02060

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## Tax Updates

### Individual

**Kentucky.** A web pay paragraph option has been added to Kentucky on Kentucky > General > Options - Web Pay paragraph code (Interview Form KY1, Box 41). This option can be used on the tax return, estimates, and/or extension.

## Electronic Filing Updates

### Corporation, S Corporation, and Partnership

**South Carolina.** To file Corporation, S Corporation, and Partnership returns for South Carolina, this release must be installed as the state has implemented a new schema effective February 16, 2023.

### Individual

California Form 568	Louisiana Nonresident	Multnomah Form MET
California Form 568 Extension	Maryland	Multnomah Form MUL/POR
Kansas City Form 108	Maryland Estimates	Multnomah Form TriMet
Kansas City Form 108 Extension	Maryland Extension	New Hampshire
Kansas City Form 109	Multnomah Form ARTS	New Hampshire Extension
Kansas City Form 109 Extension	Multnomah Form LTD	New Hampshire Form BT-Summary
Kentucky City – Louisville	Multnomah Form MC-40	New Hampshire Form BT-Summary Extension
Louisiana		

### Corporation

Federal Form 1120F	Idaho Combined	Multnomah Form MET
Alabama Consolidated	Iowa	Multnomah Form MUL/POR
Alaska	Iowa Consolidated	North Carolina
Alaska Consolidated	Kansas City	North Carolina Consolidated
Colorado	Mississippi Extension	Oregon
Colorado Consolidated	Missouri	Oregon Consolidated
Georgia Consolidated	Missouri Consolidated	Oregon Form OR-CAT
Idaho	Multnomah Form CES	Oregon From OR-CAT Consolidated

## S Corporation

Arkansas  
Arkansas Composite  
Georgia  
Hawaii  
Idaho

Iowa PTE  
Kansas City  
Kentucky Withholding  
Montana  
New Mexico

New Mexico Nonresident  
North Carolina  
Oregon Composite  
West Virginia

## Partnership

Georgia  
Hawaii  
Idaho  
Iowa  
Iowa PTE  
Kansas City

Kentucky Withholding  
Mississippi  
Mississippi Extension  
Montana  
New Mexico

New Mexico Nonresident  
New York City  
North Carolina  
Oregon Composite  
West Virginia

## Fiduciary

Kentucky  
  
Kentucky Extension

New Hampshire  
  
New Hampshire Extension

New Hampshire Form BT-  
Summary  
New Hampshire Form BT-  
Summary Extension

## Exempt Organization

Michigan Form 1041

Michigan Form 1120

## Tax Product Updates

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### Individual (1040) Product Updates

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#### Arkansas

Scholarship income reported on Form AR-OI is no longer subtracted from wages reported on Form AR1000F or AR1000NR.

The calculation of AR1000TC's credit for taxes paid now uses taxable income in lieu of AGI.

#### Maryland

**Form 502, Page 4 and Form 505, Page 3**, now fill the direct deposit of refund to State of Maryland when Banking information for IAT shows blank or Domestic account. If Foreign account is present, then Forms 502 and 505 check the box to indicate that the refund goes to an account outside of the United States.

#### Oklahoma

The military exclusion for military retirement is now 100% for 2022.

#### Oregon - Multnomah/Portland/TriMet

Form **MET-40** and **MC-40** extensions are now included when printing all extension forms.

## Corporation (1120) Product Updates

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### New Jersey

**Form 100U, Page 7, Schedule A, Line 26, Tiered Subsidiary Dividend Pyramid Tax Credit**, will now carry from an override entered in New Jersey Corporation > Other Credits > Tiered Subsidiary Dividend Pyramid Tax Credit (Interview Form NJ17, Box 84).

**Form 100U, Schedule G, Page 2, Exception 4, Lines 1 and 2, Checkboxes**, will now carry from member companies.

### New Mexico

**NM Form RPD-41379, Schedule I, Column 1** has been updated to include 2013 NOLs.

## S Corporation (1120S) Product Updates

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### Arkansas

AR K-1, Line 13A no longer has the \$25,000 limitation that was in place for 2021 returns.

### Idaho

Form PTE-12, Column e now equals Form 415, Line 56 minus Lines 51, 53, and 54 per new form instructions.

### Illinois

IL-4562, Line 10 will now include assets from prior years.

### Iowa

Iowa Schedule K-1. Allocations for Iowa information follow Federal K-1 amounts when specially allocated.

### Kentucky

Kentucky composite return input was made inactive.

Withholding underpayment penalty calculation will now use correct due dates for estimated payments due.

### New Hampshire Electronic Filing

Diagnostics 48778, 48784, and 48020 have been updated to reference the most current line changes.

### New York

Form CT-3, Page 6, Part 6 marks the box indicating “no gross receipts” when expected.

Form CT-34 SH, Line 1a. Excess of PTE prepayments over calculated PTE now computes the excess properly even when an override entry for other taxes paid is made on the PTE worksheet.

### Rhode Island

Return, estimate, extension letters, and instructions will indicate payment needs to be made by electronic funds transfer when the total amount due to Rhode Island is \$5,000 or higher and when gross receipts are over \$100,000.

### West Virginia

The apportionment factor is now being used throughout the return when using the sales factor on Form PTE-100APT.



## Partnership (1065) Product Updates

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### Federal

Duplicate copies of the Schedule K-2, Pages 1, 2, and 3 no longer get included in Accountant, Client, and Government copies of the return.

**Form 8990.** Guaranteed payments on Line 4 of the Schedule K will no longer factor in to the calculation of Tentative Taxable Income on Form 8990, Line 6.

**Schedule K-3, Line 24** amounts will include the Line 18 amounts when the Line 18 statement is not present in the return.

### Colorado

**Colorado Form DR 0106K, Line 7** now only includes Federal K-1, Lines 8, 9a, and 10 in the calculation.

### Idaho

**Form PTE-12, Column e** now equals Form 65, Line 53 minus Lines 48, 50, and 51 per new form instructions.

### Kentucky Cities

Daviess county tax rate has been updated.

### Michigan

**Form 807.** Letters now show the overpayment that's being applied to estimates.

### New Mexico

**Form RPD-41367 Schedule A, Line 12, Entity Level Tax on Distributive Net** now calculates tax only when input on New Mexico > General > Basic Data > Entity Level Tax Election (Interview Form NM1, Box 54) is selected.

### Ohio

**Ohio Commercial Activity Tax.** Return is no longer included on the cover letter when OH CAT is not active.

## Fiduciary (1041) Product Updates

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### Federal

**Form 4797.** The regular Form 4797 AMT, Line 8 statement no longer includes ESBT, Section 1231 carryovers.

**Schedule E, Page 2.** Input on partnership passthrough for Other tax-exempt income no longer doubles.