

CCH® ProSystem fx® Tax

2022.03000

Release Notes

March 5, 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. 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 2022.03000

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Tax Updates

Individual

The following features are now available: Tax Projector, Tax Equalization, and Two Year Comparison.

Corporation, Partnership and S-Corporation

Oregon Multnomah extensions (Form EXT) are not available to be electronically filed with this release due to schema changes and additional forms needed to accommodate that schema from the state. If an extension is released during this period, it will be automatically stopped by the system. Electronic filing of extensions will be available with release 2022.03010, starting on March 19th. During this period, the extensions can be paper filed.

Electronic Filing Updates

Corporation

Illinois

Ohio Cities Form MNP

Ohio Cities Form MNP
Consolidated

Illinois Consolidated

Ohio Cities Form MNP Estimates Philadelphia

Louisiana

S Corporation

Arkansas PTE

Louisiana

Ohio Cities Form MNP Estimates

Arkansas PTE Extension

Ohio Cities Form MNP

Philadelphia

Partnership

Louisiana

Ohio Cities Form MNP

Philadelphia

Louisiana Form CIFT-620

Ohio Cities Form MNP Estimates

Exempt Organization

District of Columbia

Maryland (Form 1041)

999

Tax Product Updates

Individual (1040) Product Updates

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Federal

Federal Elections. The IRC section is updated from Section 451(d) to Section 451(f) for the "Election to Include Crop Insurance Proceeds in Gross Income in the Taxable Year Following the Taxable Year of Damage or Destruction."

Form 1040. Withholding on the wages statement no longer includes Excess Deferrals.

Form 8915-F. Line 14 now picks up the repayment amount when coded to spouse and the calendar year in which the disaster occurred is 2020.

Schedule EIC. New input is available on Schedule 8812 - Credits for Qualifying Children and Other Dependents > Credits for Qualifying Children and Other Dependents > Medicaid waiver payments excluded from income if different from Schedule 1, Line 8s (Interview Form 1C, Box 40) that will be used on Schedule EIC-Earned Income Worksheet, Line 2 as well as Schedule 8812, Credits for Qualifying Children and Other Dependents, Line 4.

The 2-Year Comparison Worksheet

- The 2-Year Comparison Worksheet includes prior year Form 8812 amounts. **This was initially included in the 2022.02070 release.**
- The 2-Year Comparison Worksheet includes a line referencing prior year Child Care Tax credits. **This was initially included in the 2022.02070 release.**

Colorado

Form DR 0104CR, Line 14 is limited to 100%.

Iowa

The Iowa School District Surtax rates for line 54 have been updated for 2022.

Kansas

Form 200 addresses print on letters and filing instructions.

Massachusetts

Non-qualified plans entered on IRS-W2 are included in the Massachusetts wage line instead of other income line. **This was initially included in the 2022.02070 release.**

Michigan

Diagnostic 35970 will not issue when PDF MI25 is attached for FTE credit claimed on MI-1040, Line 29.

Michigan > Basic Data > Line 16 - Code for SSA exempt (Interview Form MI1, Box 56) checks Schedule 1, Box 23c only.

Schedule 1. The input for exception, under MI worksheets > Section 2. Basic Data > Line 16 - "Born after 1953, retired as of 1/1/2013, and received SSA exempt retirement benefits" (Interview: MI1>Box 57) will calculate the Tier 2 Michigan Standard Deduction on Schedule 1.

Minnesota

Minnesota address for LLC has been updated to reflect address in current instructions.

Montana

IRA death benefits reported on IRS Form 1099-R, with State Code 19 no longer include the death benefit amount in the Pension Exclusion calculation for Form 2, Page 5, Line 34 and Form 2, Page 6.

New Mexico

PIT-ADJ. New Lines 23 and 24 for social security on Form PIT-ADJ calculate. **This was initially included in 2022.02060.**

Ohio - Ohio Cities

Ashland. Tax rate has been updated from 2.25% to 2%.

Generic Form R, Worksheet NOL-3 has been expanded by one line to accommodate returns with current year net operating losses when net operating loss carry forward is present for all five prior years.

Rhode Island Electronic Filing

Line 6 on Rhode Island > General > Residency is now inactive, and input for form IND-HEALTH should be made on Shared Responsibility Payment > Household Member Information section.

Corporation (1120) Product Updates

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Kansas

The latest versions of the Kansas annual reports are now available.

Kentucky Cities – Lexington

A new version of Form 228-S ENP is now available.

New Hampshire

Electronic filing has been updated for the amount on Line 1C of the DP-80 to prevent reject NHDP80-001

S Corporation (1120S) Product Updates

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Federal

Schedule K-3. When using the option to select manual shareholders to generate Schedule K-3's, the correct shareholder generates the Schedule K-3 (or turn off the Schedule K-3 if that option is used).

Georgia

An option has been added to automatically add back the GA taxes deducted on the federal return. The option is available on Georgia > Income / Deductions > Adjustments (Interview Form GA1, Boxes 71 and 72).

Form 600S, net worth beginning date is correct when filing a short year return and not an initial return.

Georgia > General > Basic Data > Electing to pay tax at the entity level no longer disappears when the return is calculated.

Iowa

Form PTE-C, Page 2 corrects tax rate for tax exempt entities and corporations to 9.8% instead of 8.53%.

IA 1120, Schedule K, Line 3 calculates the correct amount from Federal Schedule K, Line 3c.

IA 1120S, Line 5 no longer doubles amounts for dividend amounts.

IA Form 41-175 will no longer generate if information is not entered for the form to produce.

Kansas

The latest versions of the Kansas annual reports are now available.

Kentucky Cities – Lexington

A new version of Form 228-S ENP is now available.

New Jersey

Form PTE-100, Line 1, Distributive Proceeds, now carries from Schedules PTE-K-1.

Form PTE-100, Member Directory, now carries from Schedules PTE-K-1.

North Carolina

For Taxed S Corporations, any entry on Payments/Penalties/Estimates > Estimates and Application of Overpayment > State Estimates and Application of Overpayment > Change in taxable income field alters estimated income amounts on Form CD-429-PTE, Lines 1a and 1b.

Rhode Island

The calculation of gross income for the threshold to require electronic payments includes income from rental real estate, royalties, farming, interest, and dividends.

West Virginia

The "I authorize the tax division to discuss my return with my preparer" Yes / No box can be checked.

Partnership (1065) Product Updates

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Alabama

Form 8453-PTE prints "PTE-C" in the top right corner if Form PTE-C is active in the return.

Arizona

Filing instructions display amount owed when payments are present in return that present a balance due.

Florida Electronic Filing

Electronically filed extensions will no longer receive the message "Missing State Information" when released.

Georgia

An option has been added to automatically add back the GA taxes deducted on the federal return. The option is available on Georgia > Income / Deductions > Adjustments (Interview Form GA2, Boxes 47 and 48).

Form 700, Schedule 3, Line 4 will no longer populate when not a PTE return.

PV Corp. Payment voucher will be removed when no balance is due.

The option to not make payments via EFT will apply to estimated payments.

Iowa

Forms/Lines: IA-1065, Page 3, Line 16; IA-1065, Page 7, Line 17; and IA K-1, Page 2, Line 17 no longer account for EBIE since it is calculated on Form 163.

IA 1065, Schedule K, Column b, Line 7 will only be positive amounts. If the amount in Column a or Column b is negative, then it will be zero.

IA Form 78-629a, Line 3. Line description now works correctly and prints correctly.

Iowa Schedule K-1, Part 5 will now only generate for trusts and estates and individuals.

Iowa Electronic Filing

Form IA 1065 signature field produces preparer name in Preparer's Name (printed) field when entered. If not entered, the field will use firm name.

Form IA 1065, Part 3, Question b. ii-iv generates if nonresident partners, and will default yes unless marked otherwise.

Form PTE-C, Page 3 corrects tax rate for tax exempt entities and corporations to 9.8% instead of 8.53% percent.

Form PTE-C addresses for members 5 and 6 now display the correct address information.

IA 1065, Schedule K, Column d, Line 15 calculates correctly.

IA Schedule K-1, Lines 14,15,16, and 17 all calculate correctly.

Iowa Schedule K-1, Page 2, Column b, Line 2 generates for residents.

Kansas

Form K-120ES uses the 5.7% tax rate for the PTE's estimated tax liability.

It is possible to manually select whether or not electronic fund transfer is used for both PTE and composite payments. This can be done with input on Kansas > General > Basic Data > EFT - electronic fund transfer options for PTE payments, and on Kansas > Composite > Kansas - Composite Tax Basic Data > EFT - electronic fund transfer options for composite payments.

The latest versions of the Kansas annual reports are now available.

Kentucky Cities – Lexington

A new version of Form 228-S ENP is now available.

Nebraska

Custom filing instructions will properly reflect the new community college credit.

New York - New York City

NYC Form UBT can be suppressed when selected on New York > Cities > General > NYC-204/NYC-204-EZ print code field (Interview Form NYC1, Box 41).

NYC PTE will generate amounts when exempt has been selected for NYC.

New York City Electronic Filing

NYC Form 204EZ zeros out when return has been selected as exempt in NYC.

Ohio

The transmittal letter and custom filing instructions reference ELF when filing Form OH IT 4738.

Virginia

Partnership Virginia 502 PTET filing instructions have been updated to include account information for banking.

West Virginia

Form K-1, Withholding section, Line 2, Amount of West Virginia tax withheld, now displays all proper withholdings according to the Schedule SP.

Schedule SP prints all partners when there are more than 10 partners.

Fiduciary (1041) Product Updates

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Federal

Schedule K-1. The calculation of the Schedule K-1 has been updated to accurately reflect override amounts when all income is being distributed and overrides have been used for the Schedule B, Lines 9 or 10.

Alabama

Schedule K-1. Column B amounts are not allowed for electronic filing when resident beneficiary box is checked.

North Carolina – Electronic Filing

NC returns where form D-407, Line 6 is not equal to Schedule B, Line 5 will now be disqualified from electronic filing.

Exempt Organization (990) Product Updates

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Oregon

Form CT-12, CT-12F, and CT-12S.

- Phone number fields are formatted 999-999-9999.
- Suite numbers are included in Section I addresses.
- The paid preparer address separates the street address and city by a comma. The paid preparer address may also be filled using General > Basic Data > Principal Officer or Officer Signing Return, if Different > Use organization's address field (Interview Form 10, Box 40).

Estate & Gift (706/709) Product Updates

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Illinois

Estate Tax Payment Form. Illinois has updated the address for making estate tax payments in person in Chicago.