

ProSystem fx Tax (SaaS)
2012-3.0
Release Notes

February 2013



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Contact and Support Information

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You can find product and account information by visiting Customer Support online at <http://Support.CCH.com/Suite>. In addition to product and account information, the Customer Support site offers answers to our most frequently asked questions, forms release status, training videos, and Windows compatibility with each ProSystem *fx* product area.

The following Web site provides important information about the features and updates included in all ProSystem *fx* Tax (SaaS) releases:

<http://Support.CCH.com/Suite/ReleaseNotes/Tax>

Visit the <http://Support.CCH.com/Notes/appStatus.aspx?type=SaaS&prodid=934> Web page to view the current status of our SaaS applications. The Application Status Web page is updated every 15 minutes. You may visit at any time, even when Support is closed.

Go to Support.CCH.com/Contact to find a list of options for contacting Customer Support. This site also includes a link to the ProSystem *fx* Suite Support Calendar.

Technology Updates

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Electronic Filing

- You can currently upload and release qualified returns for transmission.
- We continue to closely follow IRS communications and will forward plans for finalizing and accepting the remaining tax forms whenever information is available. We will provide software updates to allow electronic filing of these forms as soon as possible once the IRS finalizes their timeline.

In addition to those previously announced, the following state products are approved and available for electronic filing submission, as noted above:

Individual

Tennessee Form INC 250

Corporation and S Corporation

Illinois

Batch Electronic Filing of Extensions

Batch electronic filing of extensions is available on this release for the following taxing authorities:

Individual

District of Columbia

Tax Update

Corporation / S Corporation

New Jersey Banking Form BFC-1 for tax years ending through June 30, 2013, and all associated schedules are now available.

Maine 2D barcode is updated.

Return Manager

Return Manager appropriately displays the Electronic Filing Status, as applicable.

Product Updates

Individual (1040) Product Updates

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Federal

Form 8615. Form 8615, Line 18, carries to Form 1040, Line 44, for married filing separately status 5, 6, and 7.

Form 8812. Disqualifying diagnostic 43697 issues when the substantial presence test is not answered for dependents with an ITIN.

Form 8867. When 'Yes' has been entered on Lines 23 through 25, the related 'Does Not Apply' field is cleared.

Form 8889. The name and SSN will print at the top of Form 8889 when the HSA information has been entered exclusively on Wages > IRS W-2 (Interview Form IRS W-2).

Electronic Filing

Form 3800. The EIN entered on Form 6478 - Credit for Alcohol Used as Fuel (Interview Form P-19, Box 35) is included on Form 3800, Page 3, Line 4c, when the credit is associated with a passive activity.

Form 5405. Disqualifying diagnostic 43740 issues if line 1 is blank and line 2 or line 3 is not blank.

Form 8862. The address for child 1 on line 6a is included in the electronic file.

Form 8863. An overflow sheet is available when a student has attended more than two institutions on page 2, part III, lines 22 (1) through 22 (4), columns A and B.

Form 8863. Disqualifying diagnostic 43311 issues when the optimization education code has been selected, but the conditions to optimize are not met.

Form 8863. Form 8863 is included in the electronic file when the form is printing and a selection has been made to force printing.

Schedule B. Disqualifying diagnostics are issued for Hawaii when there is missing and invalid payor information on Form 1099-INT and Form 1099-DIV.

Schedule F. Disqualifying diagnostic 48154 will issue if more than 100 characters have been entered for Farm/4835 > eFile Information > Commodity Credit Loans Explanation (Interview Form F-3, Box 102).

Arkansas

The rates on the supporting statement for Form 1000ADJ, Line 6, Student loan interest, use the correct rates for tax year 2012.

Arkansas Electronic Filing

Disqualifying diagnostic 43771 issues to require the taxpayer email address when the spouse email address is entered.

California Electronic Filing

Disqualifying diagnostic 40001 generates only when accompanied by another CA disqualifying diagnostic.

Colorado

Long Term Care Insurance Credit is updated to allow two policies for married filing joint returns when federal taxable income is under 50,000.

Connecticut

Input is available to indicate Form OP-424 is final, the entity has been dissolved/withdrawn with the CT Secretary of the State, and/or the entity is changing status on the Connecticut Taxes worksheet, Business Entity Tax section, Final OP-424 return, Entity has been dissolved/withdrawn with the CT Secretary of the State, and Changing Status fields (CT4, Boxes 126 through 128).

District of Columbia Electronic Filing

Disqualifying diagnostic 48020 issues when the direct debit date of payment for an electronically filed return is greater than the current date.

Hawaii Electronic Filing

Disqualifying diagnostic 43093 issues when Schedule X, Line 7, is less than \$1000.

Illinois Electronic Filing

Form IL-2210, Line 41, Columns A through D, will not allow amounts less than zero. Disqualifying diagnostic 43677 will issue if an amount less than zero is entered on the government form as an override.

Indiana

Form IT-40NOL, Line 1, includes only the federal net operating loss as calculated on Federal Form 1045.

Schedule IN-2210 calculates regardless of an underpayment penalty when the return configuration set forces the preparation of the 2210 have been applied.

Indiana Electronic Filing

Disqualifying diagnostic 43650 issues when the number of eligible dependents qualifying for the Private School/Home School deduction exceed the number of eligible children included on Form IT-40, Schedule 3, Line 1, or Form IT-40PNR, Schedule D.

Disqualifying diagnostic 43660 issues when the Indiana modified tax liability is less than or equal to zero and the automatic taxpayer refund credit is greater than zero.

Iowa Electronic Filing

A disqualifying diagnostic issues when Form IA 130 is forced to print when no credit for taxes paid is calculated.

A disqualifying diagnostic issues when Form IA 4562A is in the return with no Form IA 4562B.

The disqualifying diagnostic for the NOL Worksheet now issues when any amount is present on the form with no Section A completed.

Louisiana Electronic Filing

Form IT-540, IT-540B and IT-540B-NRA print when the option to print full/entire government copy of electronic return is selected on General > Electronic Filing > General > Do not print the reduced government copy of the electronic return (EF-1, Box 38) or in the return configuration set.

Maine Electronic Filing

Disqualifying diagnostic 42218 now issues correctly when the Forest Management Planning credit is present.

Maryland Electronic Filing

Disqualifying diagnostic 41990 issues if state wages have been entered without a state code.

Michigan

Diagnostic 23923 issues when Form MI-1040CR-5, Part 2, Column C, does not include a partner's or joint owner's percentage of income.

Form MI-1040CR-7, Line 13g, includes a spouse exemption when filing status is married filing separately, spouse not filing.

Form MI-1040CR, Line 17, and MI-1040CR-2, Line 16, include net farm rental income or loss.

Michigan Electronic Filing

Disqualifying diagnostic 40961 issues when the renter's address on Form MI-1040CR does not include a valid ZIP code.

Disqualifying diagnostic 43653 issues when Schedule 1, Line 6, has a description and no amount.

Disqualifying diagnostic 43876 issues when Schedule 1, Line 13, is greater than zero and either the taxpayer or spouse (if married filing jointly) date of birth is after 12/31/1999.

Disqualifying diagnostic 43880 issues when either taxpayer or spouse (if married filing jointly) date of birth is after 12/31/1999 and Form MI-4884 exists in the return.

Disqualifying diagnostic 43883 issues when Schedule 1, Line 13, is greater than zero and neither the taxpayer or spouse were born prior to 1946.

Disqualifying diagnostic 43891 issues when Form MI-1040, Page 2, Line 27b, does not equal Line 27a multiplied by 6% (0.06).

Form MI-8949 prints in the tax return when federal and Michigan gain/loss amounts are identical.

Spouse year of birth on Form MI-4884, Line 5, will not print unless filing status is married filing joint.

Minnesota Electronic Filing

Form M1CR disqualifying diagnostic for line 3 no longer issues when credit for taxes paid is zero.

Minnesota M1PR Electronic Filing

The Certificate of rent paid now includes spouse coded entries on a single return.

Mississippi

Capital gains flow to Form 80-108, Part 5, as other income when the Federal Schedule D is not required per Mississippi Department of Revenue.

Estimate vouchers and estimate worksheet reflect tax year 2013.

Mississippi Electronic Filing

Disqualifying diagnostic 43691 issues when the payer's ZIP code is missing or invalid from Form 80-107.

Missouri

Form MO-1040 fields, diagnostics, and bank account numbers change to asterisks when selecting mask option for print.

Form MO-A WKST, Qualified Health Insurance Premiums, all Medicare insurance premiums included on Federal 1040, Line 29, Self-employed health insurance deduction, are excluded from worksheet calculations.

Nebraska

Form 3800, Line 15, prints information entered on Interview Form NE9.

Nebraska Electronic Filing

Disqualifying diagnostic 43519 issues when the beginning or ending date for the NE NOL is missing.

Disqualifying diagnostic 43720 issues when an amount is present on Form 1040N, Page 2, Line 57, for Non-Nebraska S Corp or Limited Liability Company Income but no Form K-1N is present in the return.

New York Electronic Filing

For TY 2012, the New York Department of Taxation and Finance requires that the preparer's date signed be included in the electronic file. Previously the date had to be entered manually in the Date Signed by Preparer field or the Print Date Signed by Preparer option had to be used. If these fields are blank, the prepared date is now filled in the electronic file automatically with the current date during the export process. This prevents disqualifying diagnostic 47264 from issuing.

Form IT-215 is not included in the electronic file when line 16 is zero.

When Form IT-215 and Form IT-216 are not printing, the dependent records are not included in the electronic file.

New York City Electronic Filing

New York City Forms 579 and 200-V print upon export of the electronic file.

North Carolina

The Return Summary itemized or standard deduction line now shows the North Carolina amount when standard deduction is used.

When the taxpayer is single and claimed as dependent, \$300 is added to the earned income to determine the standard deduction.

Ohio Electronic Filing

Disqualifying diagnostic 43779 will issue if OH IT-1040, Schedule A, Line 47, has been overridden to be mathematically inaccurate.

Oregon - Multnomah/Portland/TriMet

Form DME prints the taxpayer's and spouse's social security numbers.

Pennsylvania

PA-40, Line 13, prevents withholding doubling from a 1099R.

Schedule C, Line 12, only allows depletion to be an amount greater than zero.

Schedule G-L, Line 2f, Column B, only picks up net pro rata share of S Corporation income coded as NJ source for credit for taxes paid to NJ.

South Carolina

The rounding issue of W-2 withholding flowing to SC 1040, Line 20, has been corrected.

Utah Electronic Filing

Disqualifying diagnostic 49331 issues when Form TC-40B, Lines 16A and/or 16B, are negative.

Virginia Electronic Filing

Diagnostic 43678 issues whenever the payer's name is missing from a 1099G that includes Virginia withholding.

Partnership (1065) Product Updates

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Federal

Form 1065, Page 1, Lines 16A, 16B, and 16C, now include amounts from the Depreciation and Amortization Totals worksheets (Interview Forms DP-5 and DP-6).

K-1 transfer of interest ownership percentage has been updated to compute from multiple changes of interest entities using units.

Arkansas

Form AR 1050, Line 10, Column B, now includes the amount from Form 6781, Line 5.

Arkansas Electronic Filing

Diagnostic 46729 now issues when an amount is present on Form AR 1050, Line 19, and Form 4562 is not present in the return.

Form AR 1050, Reject Code PIT2012-0093, is no longer issued when there are parenthesis in the partnership's telephone number.

California

Form 565, Schedule K-1, Line 19b, now includes distributions subject to Section 737.

California Electronic Filing

California Form 3522 will no longer print when the annual tax payment is being paid electronically.

Connecticut Electronic Filing

Diagnostic 33748 issues when the Connecticut Form CT-1065/1120SI EXT is present in the return and the return is being electronically filed.

Form CT K-1T is no longer mentioned in the letters and instructions as needing to be mailed when the Connecticut state return is electronically filed, as required by the state.

Georgia Electronic Filing

Georgia returns will no longer reject for XML schema parse errors.

Idaho

Partners other than individuals or grantor trusts are now included on Form PTE-12.

Iowa

Form IA 137, Line 7, is now annualized for fiscal year filers.

Kentucky

Filing instructions and transmittal letters no longer show an amount for underpayment penalty for Form 740NP-WH when one is not calculated.

Form 8825, Line 20b, now includes name and FEIN.

Schedule RPC now prints if an exception is present, even if the add back is 0.

The K-1 package no longer stops printing when the Kentucky unit is present.

Kentucky Cities

Address for Lexington board of education mailing sheet has been revised to the new mailing.

Filing instructions Form 228S has been revised to produce whenever the form is present in the return.

Michigan

Form 4567, Line 46, will now pick up the 2011 MBT loss carryover from worksheet Michigan > Income and Deductions > MBT 4567 Adjustments and Overrides, or Interview Form MI20, Boxes 56 and 57.

The Schedule K-1 Equivalent will now print in the K-1 copies.

The Schedule K-1 Equivalent withholding amount can now be overridden by using the fields in "State Use 4" column on worksheet Federal > Common State > Generic State Schedule K-1 Information > Generic Partner Input or Interview Form ST-1, Boxes 163 - 195.

Minnesota

The cross-reference for Schedule KPI has been updated.

Mississippi

Form 84-132, Schedule K-1 footnotes, now prepare when requested.

New Jersey Electronic Filing

Extensions filed electronically now reference electronic filing if the extension letter is selected.

Prior to this release, the Part 100 was only excluded from printing in the government copy if Electronic Funds Withdrawal was selected. Now, the Part 100 is excluded from printing in the government copy when it will be sent to the IRS electronically.

New York Electronic Filing

Diagnostics 45589 and 45590 are replaced with 43749 and 43750.

New York reject R1001 due to a tax liability begin date in 2011 will be resolved with diagnostics 55651, 56570, and 46544.

Pennsylvania

The Pennsylvania cross-reference has been updated to include references to the Tax Matters Partner.

The Pennsylvania diagnostic report no longer references Form RCT-101 when data relating to Form RCT-101 has been deleted.

Pennsylvania Electronic Filing

Diagnostic 43585 is issued to request detailed information for pass through entities for Form PA-65, Page 3. The diagnostic is modified to make sure the return is disqualified when the diagnostic is issued.

Diagnostic 45605 is now issued to direct the filer where the needed input can be entered in order to clear the diagnostic when electronic filing is requiring the authorized person information for the filing of the PA-65 Corp return.

Rhode Island

Form RI-1065, Line 10a, no longer includes Form 1096PT payments.

Utah Electronic Filing

A diagnostic is now issued for Reject Code 16_12_153. If the withholding waiver on Schedule N, Line B, is present, then the withholding waiver request needs to be completed. The waiver can be completed with input on worksheet Utah > General > Options > Schedule N withholding waiver (Interview Form UT1, Box 51).

Corporation (1120) Product Updates

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Consolidation

The issue of capital gains/losses from passthrough entities that were being shown on Form 8949 with Box B (Transactions Reported on Form 1099-B Showing Basis was Not Reported to the IRS) being checked has been fixed. This was inconsistent with separate company treatment where passthrough capital gain/loss transactions were shown on Form 8949 with Box C (Transactions not reported to you on Form 1099-B) being checked. Consolidated returns will now show passthrough capital gain/loss on Form 8949 with Box C checked.

On the consolidated open line statements, such as Other Deductions, Other Income etc..., the first column named "Combined Amounts" will change to "Consolidated Amounts" to reflect inclusion of consolidated adjustments.



Note: For consolidated returns calculated prior to release 2012.03000, the return must be recalculated after loading release 2012.03000. If not, the company names on the consolidated open line statements will be blank.

The statement reference printing on the Consolidated Ending Balance Sheet for Other Current Assets has been adjusted to print on the appropriate line.

Electronic Filing

Form 8821 will now print in the government copy when the return is being electronically filed.

The complete copy of the Federal return will now print when "No" is selected for electronic filing in the return.

Diagnostic 56300 will now issue when USA is entered as the foreign country code. This prevents a schema validation error in the consolidated member statement that is included electronically when a consolidated 7004 extension is uploaded for electronic filing.

A diagnostic will now issue when the invalid country code of NT is selected for the location of books country.

Arkansas

AR1100CT, Part B, has been revised so that all apportionment factors on line 4b must be 400% or less to avoid disqualifying from electronic filing. It has also been modified so that double weighted sales factor apportionment on line 3g must be 200% or less to avoid disqualification. If either of these two conditions are not met, electronic filing diagnostic number 45599 will issue with the following instructions:

Arkansas Electronic Filing. Apportionment Factor Incorrect: a.) Double weighted amount cannot be greater than 200%. b.) Sum of Percentages cannot be greater than 400%.

The diagnostic has also been re-worded to closely resemble Arkansas reject code 105.

AR1100CT, Line 25, has been revised to allow state depreciation adjustments using the 4562 totals method and still qualifying the AR1100CT for electronic filling. It is no longer a requirement to make entries using the depreciation detail method.

California

Credit code 224, Donated Fresh Fruits or Vegetables, has been added to the program.

Form 3805Z has been updated to include three new Enterprise Zones: Anaheim, Harbor Gateway Communities, and Pittsburgh. Enterprise Zones Antelope Valley and Watsonville have been moved to the expired list.

Hawaii

Diagnostic 23772 will now issue when the Ethanol Facility Tax Credit is claimed along with other credits.

Illinois

IL-1120, Corporation Income and Replacement Tax Return, will no longer report a net loss deduction on Step 5, Line 38, after all Illinois loss year input is deleted while all loss years are currently showing on Schedule NLD, Net Loss Deduction.

Schedule 1299-B, Enterprise Zone or Foreign Trade Zone (or sub-zone) Subtractions, will now correctly calculate the interest subtraction for the High Impact Business Interest Subtraction (Line 33), Enterprise Zone Interest Subtraction (Line 27), or River Edge Redevelopment Zone Interest Subtraction (Line 29) when the basis of the property is more than the loan amount.

Schedule 4255, Recapture of Investment Tax Credits, credit recapture amounts shown on the statements will now correctly sum to the amounts reported on lines 2 (Enterprise Zone or River Edge Redevelopment Zone Investment Credit), 4 (High Impact Business Investment Credit), and 6 (Replacement Tax Investment Credit).

Illinois Combined

Schedule UB, Combined Apportionment for Unitary Business Group, Page 4, Lines 11 through 13, Allocated Net Loss, will only show an amount if Line 10, Combined Net Income, Column D, is negative.

Kentucky Cities

The address for Lexington board of education mailing sheet has been revised.

Maine

Tax credits entered on Form 1120ME, Line 8c, will now be limited to the Maine corporate income tax amount on Line 7a.

Massachusetts Electronic Filing

Diagnostic 42961 will now only issue if they have Mutual Fund Service Company selected or Section 38 selected and 25 or more employees on Schedule U-ST, Line 8.

Michigan

Copies of the federal forms will now print after the CIT forms.

Form 4910, CIT Unitary Business Group (UBG) Combined Filing Schedule for Financial Institutions, Page 2, PART 2B, Line 9, the parent's date of incorporation will no longer show in UBG return as the "Discontinued Effective Date".

Form CIT 4891, Page 1, Line 9g, will now calculate when zero MI sales has been entered on Line 9a or Line 9b.

New Jersey

The New Jersey calendar year Banking Form BFC-1 has been updated to the final version.

New York

Form CT-3, Page 2, Line 25, Entire Net Income Base Tax, has been updated to calculate using the Eligible Qualified New York Manufacturer 3.25% rate when the corporation is both a qualified Small Business and an Eligible Qualified New York Manufacturer.

New York City Electronic Filing

The Banking Corporation Tax (BCT) check box on Form NYC-EXT will now be marked when banking form NYC1 is present in the return and electronic filing is indicated.

North Carolina

The FEIN will print on all vouchers when Form CD-429 is present in the return.

Pennsylvania

Rev-799 has been revised to print when there are 2001 Bonus Depreciation assets, as well as 2012 Bonus Depreciation assets.

Rhode Island

Form RI-1120X has been updated to the final version of the form.

Virginia

The date will not print on Form 8453-C, Part II, unless requested on Federal - General - Electronic Filing - Electronic Signatures - Date signed by taxpayer (Interview Form EF-1, Box 64).

Wisconsin

An option has been added to Wisconsin Corporation returns to automatically generate PDF statements for the statements for Schedule V, Lines 8 and 9, and Schedule W, Lines 9 and 10, on electronically filed returns. If the option is marked on the Wisconsin - General - Options worksheet to automatically create a PDF of statements for electronic filing (Line 10) or on Interview Form WI1, Box 42, any existing statements for these lines will be created as a PDF statement, attached to the electronic file for the return, and submitted to Wisconsin. If the worksheet option or interview form box is not selected, the statements will not be sent to Wisconsin unless they are manually attached via the Federal - General - Electronic Filing - PDF Attachment -Optional worksheet or Interview Form EF-PDF1, Boxes 140 through 204.

In combined returns, the apportionment numbers are recomputed at the consolidated level using information from the separate company's Form 4A-1 or Form 4A-2. Because of this, apportionment overrides made at the separate company level will cause incorrect calculations for the combined apportionment percentage and each company's share of combined income. Diagnostic 44375 has been added to disqualify the combined return if apportionment overrides are entered on the Wisconsin - Income/Deductions - Allocation and Apportionment worksheet or Interview Form WI4, Box 30 or 31, in any combined group member's return.

S Corporation (1120S) Product Updates

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Federal

The summary grid entry for "Suppress Carry" of state estimated tax payments to the return is now working properly.

Arkansas

Mailing Sheets have been revised for an AR1100S. The AR1100CTV mailing sheet will no longer produce when the form does not apply to an AR1100S.

California

Credit codes 223, California Motion Picture and Television, and 224, Donated Fresh Fruits or Vegetables, have been added to the program.

Georgia

Schedule K-1 equivalent will show 0 apportionment for nonresident shareholders when the apportionment shown on Form 600S, Page 2, is 0.

Idaho

Form PTE-12 will now include Idaho residents if a code of 'R' is selected.

Illinois

Schedule K-1-P, Shareholders Share of Income, Deductions, Credits and Recapture, Lines 53a (Enterprise Zone or River Edge Redevelopment Zone Investment Credit Recapture) and 53b (Replacement Tax Investment Credit Recapture) will now correctly calculate when Schedule 4255, Recapture of Investment Tax Credits, is not present in the return.

Iowa

The Iowa Form IA4562A has been updated so that Columns G and J will include the Federal and Iowa Section 179 amounts that have been added this year.

The printouts for the IA 1120S return have been updated to correctly print the statement for the Iowa Composite Shareholder Information.

Kansas

Form 120S will not print dashes for the phone number, as per the form specifications.

Kentucky

Composite Schedule NP, Column E, has been revised to populate in every return.

Kentucky Cities

The address for Lexington board of education mailing sheet has been revised.

Massachusetts Electronic Filing

Diagnostic 49800 has been updated to reflect the 2012 percentage of 8% for the amount on Line 3 of Schedule H.

Michigan

Schedule K-1 Equivalent. Net bonus depreciation adjustment and gain/loss adjustment of sale of assets will now carry to lines 8a and 8b respectively. These items can also be overridden by using the "Amount 4" and "Amount 5" fields on worksheet Shareholders/Shareholder Information/State Information or Interview Form STK-1, Boxes 173 and 174.

Minnesota

Commas will not print on Form AWC, as per state requirement.

Montana

Montana K-1, Part 6, Line 2, will include CGR Account ID when entered on Schedule K.

New Jersey

The name of the nonresident composite return filer will now print in the legal name box.
The New Jersey calendar year Banking Form BFC-1 has been updated to the final version.

New York

Form IT-203S-ATT, Column L, has been updated to use the .0882 rate.
Form POA (Power of Attorney) has been updated to properly fill the representative name.

Pennsylvania

Diagnostic # 47296 has been updated to no longer issue when negative numbers are not present on Form Schedule A.

Disqualifying diagnostic 46116 has been revised to issue when the RCT-101, Page 2, Line 6, is less than zero.

Disqualifying diagnostic 46128 has been revised to allow PA sales factors to be greater than 1.0.

REV-1190 has been revised to include the 8846 credit in the total for Part 2, Line 20, Column C.

The PA Rev-1190 has been revised to automatically include the city taxes that are deducted for federal purposes.

The REV-1190 has been updated to only print when there is an amount present on Schedule M, Part B, Section E, Line A, for PA / Federal difference on taxes paid on income.

Pennsylvania - Electronic Filing

If applicable, the PA 20S has been revised to be included in the electronic file when the RCT101I is filed.

Philadelphia

The Philadelphia mailing sheet will now reflect the BIRT - Business Income and Receipts Tax form name.

Rhode Island

Schedule K-1, Section IV, Line 2, has been updated to prevent rounding up of large amounts.

Withholding return RI-1096PT has updated printing of the box below line 11 to ensure that the number and dollar amount of withholding are correctly reported.

Fiduciary (1041) Product Updates

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Federal

The Pay To addressee on the Transmittal Letter and Filing Instructions has been corrected.

The electronic file will now pull the name control entered on Interview Form EF-1 or the Electronic Filing General worksheet.

The Schedule E statements will now print with the alternative method of printing and with a nonfileable Form 8582.

Form 1041, Page 2, Line 1, has an anomalous entry of -12. This number is not included in the calculation of the return, but does print. This issue will be resolved with the 2012-3.1 release that is scheduled to be posted on Wednesday, March 6, 2013.

Electronic Filing

Suppressing State Schedule K1's will no longer cause rejection 655. Sending both Federal and State Schedule K1's electronically will not create a rejection.

Illinois

IL 1041, Line 24a, and IL K-1-T, Line 46, have been corrected to reflect state-level subtractions.

Massachusetts

Footnotes for Form 2G will now display amounts based upon the distribution code entered in grantor returns.

Montana

Duplication of directly apportioned depletion on the MT K-1 has been corrected.

Rhode Island

Forms 1096PT and 1099PT will now be produced for a grantor return.

Exempt Organization (990) Product Updates

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Federal

The Minnesota extension letter no longer contains the mail to address for the M4NP return and the extension voucher PV84. It now only contains the extension voucher address.

Illinois

The Illinois custom filing instructions now mention the IL-990-T-X return when the IL-990-T-X return is produced instead of IL-990-T.