2023 Tax Application Changes

Listed below are issues which were corrected in the 2023 tax program. Each issue was corrected on the day listed in the Date of Change column. Impacted returns processed prior to the date indicated in Date of Change column should be reviewed to determine if reprocessing is necessary.

DATE OF CHANGE	FORM/STATE	DESCRIPTION
2/21/2025	Form 990-PF	We updated the title of the detail statement for Form 990-PF, Part XI, to reflect Part XI instead of Part XII.
2/19/2025	Colorado	We increased the print length of the address field on the 1041 Colorado return from 27-45 characters.
2/12/2025	Form 990	We updated the Illinois 990 Page 2 to comply with state changes.
2/7/2025	Form 990, Schedule R	We updated Form 990 Schedule R group print so that each group will print on the next page if there is not enough room to fully print the group
2/5/2025	Form 990-PF	We disabled a severe diagnostic for Form 990PF, Part X, Line 7 as it is no longer needed.
1/10/2025	Hawaii	A change was made to correct the amount of payment on N-201V (payment voucher) when the return was being amended.
1/8/2025	Utah	A change was made such that the 'Amended Return' code entered in Utah will print on the TC-41 even if the account itself has not been marked as 'Amended'.
12/4/2024	990 Series	We updated Form 990, Schedule D, such that 5 characters will print on Part 1, Line 1, for the total number of donors.
11/19/2024	990 Series	We updated the schema such that validation errors do not occur when Depreciation is marked as Non-Investment Assets
11/19/2024	Form 5227	We corrected an issue causing the Options&Overrides | Electronic Filing question "Does the IRS have the most current Responsible Party Information on file? We corrected it so the answer isn't always "No". for 5227 processed accounts that include Form 4720.
11/12/2024	990 Series	We updated the schema to shorten a schedule reference (Transfers to/from controlled entities) that was causing returns to be rejected.
11/5/2024	990 Series	We corrected an issue which was causing bonus depreciation to not be computed on 2023 assets.
11/5/2024	Pennsylvania	We removed estimated payment amounts from PA-41 line 13 for amended returns in accordance with the instructions.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
10/23/2024	Pennsylvania	Corrected an issue (introduced on 8/28/2024) where refund on PA resident trusts was not being saved back to database. As a result, the refund did not appear on register.
10/23/2024	Pennsylvania	We corrected an issue which caused amended returns with a balance due on PA-41X and a refund on PA-41 to not be e-fileable.
10/15/2024	Colorado	We corrected a Colorado electronic filing (schema) issue that was causing a validation error when an electronic direct deposit refund was requested.
10/9/2024	Colorado	If Non-resident beneficiaries exist on the Colorado 1041, a statement reference will now be included on Schedule D. This change does not impact the existence of the detailed statement that already exists.
10/9/2024	Massachusetts (Form 990)	An issue was corrected with Massachusetts Form PC, wherein it would not print unless the 'short-form' checkbox being selected.
10/8/2024	Massachusetts	A correction was made to prevent negative values on lines. 7b, 15b, and 21b on the Massachusetts Schedule B for nonresident returns.
10/2/2024	California	An issue was corrected with California that causing electronic filing reject rule S3804CR-010 (Pass-Through Entity Elective Tax Credit) to be generated.
10/2/2024	South Carolina	Revised South Carolina ESBT computations to treat Section 1250 gains as passive unless option is set to classify gains as portfolio
9/24/2024	Form 1041, Schedule G	If a negative amount was entered for 'Increase (decrease) from reporting year tax (Form 8978)' in Tax Review-Tax and Credits | Alternative Minimum Tax and Other Taxes/Credits, the amount was incorrectly being included on Form 1041, Schedule G, Part I, line 2e as a negative amount. A correction has been made such that it will now be included as a positive amount.
9/24/2024	Form 1116	Corrected issue where electronic filing reject 'F1116-006-01 If only one Form 1116 is present in the return, then 'SmllrOfRtnTaxOrForeignTaxCrAmt' must be equal to 'GrossForeignTaxCreditAmt'.' was erroneously being generated.
9/24/2024	Form 990	Print alignment for the Form 990, Page 1, Line 2a checkbox was modified.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
9/24/2024	Massachusetts (990)	Massachusetts Form PC, Schedules A1 and A2 will now be generated as part of the non-fileable form (state requires form to be filed through the state portal).
9/24/2024	New York	Corrected issue wherein NY IT-205, Schedule A supporting detail for 'Other Income' was incorrect.
9/18/2024	ESBT	Corrected print issue wherein credit carryover amount which appeared on ESBT worksheet was incorrect. This did not impact computations or amount of S portion credit actually carried over.
9/10/2024	Form 1116	Corrected print alignment issue on Form 1116 (minimum tax) qualified dividend adjustment statement.
9/10/2024	Form 990, Schedule J	Corrected print alignment issue on 990 Schedule J.
9/10/2024	Arizona	Revised computation of amount which appears on Arizona payment voucher such that it now includes interest and penalties (similar federal Form 1041-V).
9/10/2024	Massachusetts (990)	Massachusetts Form PC will now be generated as a non-fileable form ('Do not file' text prints at top of form). Massachusetts requires that the form be filed through the state portal.
9/10/2024	Minnesota	Corrected Minnesota Schedule M2NM, line 5, column A computation wherein losses were presented as a positive amount.
9/10/2024	Oklahoma	Corrected an electronic filing issue for Oklahoma 5x5 accounts that was causing only the grantor portion of the electronic file to be sent to the state
9/4/2024	Form 8621	Form 8621 corrections include: 1) Interest computation will now be rounded to nearest cent rather than dollar to prevent understatement of interest. 2) Addition to tax for §1291 excess distribution will now be computed when no current year §1291 distributions but there was gain on disposition of stock of a §1291 fund (or former §1291 fund).
9/4/2024	California	Corrected issue where ordinary gains were doubling up on California Form 541.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
8/28/2024	Form 8621	Automated computations and detail print have been added for §1291 distributions with respect to Form 8621, Part V, line 16. Data needed for these computations potentially include columnar entries for date acquired, date sold (in current tax year), total §1291 distribution for year, total distributions in each of 3 years preceding current year, any gain/loss from disposition of §1291 stock and foreign tax credit attributable to the distribution. Entries in the 'Amount', 'Total Amount Allocable to Tax Years Prior to becoming PFIC', 'Aggregate Increase in Tax for Each Yr in Holding Period', and 'Interest Using Section 6621 Rates & Methods' columns will be treated as overrides. If no overrides in 4 aforementioned fields are made and there is excess distribution, then line 16 statement detail will be generated. Detail for line 16f (interest) will not be automatically generated by default. If with to have detail for this line item generated, please contact support.
8/28/2024	Iowa	Corrected an issue where the Iowa PTE-C payment voucher was not being generated.
8/28/2024	Oregon	Corrected issue wherein the OR-41-V (Oregon Fiduciary Income Tax Payment Voucher) was not including interest in the voucher payment amount.
8/28/2024	Pennsylvania	System will no longer include electronic payments of $1 for balance due returns since the state does not require them. Likewise the payment voucher will no longer print in this scenario.
8/20/2024	Alabama	Corrected an issue wherein the amount on Schedule A, line 15 did not equal total of distributed amounts reported on Schedule K, line 10. This caused the return to be rejected when submitted for electronic filing.
8/20/2024	Georgia	Corrected an issue where an electronic filing reject concerning absence of business name control was erroneously being generated.
8/14/2024	Form 3800	Corrected issue where entry of a '0' on pass-through entity business credit fields was causing Form 3800 print to be incorrect.
8/14/2024	Form 8960	Corrected issue where modified AGI (Form 8960, line 19a) computation was using NII distribution deduction (from line 18b of Form 8960) rather than distribution deduction for regular tax purposes (Form 1041, Schedule B).
8/7/2024	Electronic Filing	We have corrected an issue that was preventing the electronic filing settlement date entered on Options and Overrides from being used for returns after the filing deadline

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
8/7/2024	ESBT S Portion 4952	Line 4 of the ESBT 4952 detail was expanded to follow lines on the Form 4952
8/7/2024	Form 1041, Schedule A	Corrected an issue where unrecaptured section 1250 gains were not being allocated to charity.
8/7/2024	Connecticut	A correction was made wherein the Connecticut CT-PE was generated but not being included in electronic filing in certain scenarios. This caused the return to be rejected by the state.
8/7/2024	Wisconsin	Corrected an issue on Wisconsin Form 2 for print alignment of the decedent social security number on estate returns.
8/6/2024	990-PF	A correction was made such that the required payout letter for undistributed income would properly consider leap year for fiscal year accounts ending on 2/29.
7/31/2024	Pennsylvania	Corrected issue wherein tax paid with extension was treated as income rather than principal portfolio when breaking out tax due between income and principal portfolios.
7/23/2024	Form 3800	1) Removed electronic filing reject diagnostic that generated when there was one or more credit carryovers entered on 'Form 3800 - General Business Credit' subtopic. 2) Changed diagnostic type from 'Severe' to 'Informational' for diagnostic that generates when there are business credit carryforwards to tax year 2024.
7/23/2024	Grantor Letter Credit Presentation	Corrected an issue where credit for increasing research was not appearing on the grantor letter.
7/16/2024	Ohio	A change was made to the system such that OH pass-through entity (PTE) tax credit passed from a PTE will now be allocated between the trust and beneficiaries based on distribution of DNI. Prior to this change, 100% of the PTE credit was reported on the OH trust return. The retained portion will go to the OH return whereas the distributed portion will appear on the OH beneficiary message.
7/9/2024	Form 8844	When the empowerment zone employment credit is passed from a pass-through entity, Form 8844 (Empowerment Zone Employment Credit) will now be generated.. The distributed portion of this credit will appear on beneficiary K-1(s) while the retained portion will be reflected on Form 3800.
7/3/2024	Form 3800	Corrected an issue wherein S Portion Form 3800, line 8 and 14 computations were in error.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
7/3/2024	Form 3800	Business tax credit carryovers entered on Tax Review-Tax and Credits | Form 3800 - General Business Credit | Form 3800 - General Business Credit Part III section will now be utilized in generation of Form 3800 (Parts IV and VI). Note: 1) Any business credit carryforward will be assumed to be carried over from tax year 2022. 2) Currently, any Form 3800 generated with one or more carryover entries will cause an electronic filing reject diagnostic messages to generate pending completion of testing with IRS.
7/3/2024	Form 8082	We have corrected an issue that was causing electronic filing error code 3006 for accounts that were generating Form 8082.
7/3/2024	Massachusetts	We have corrected an issue for Massachusetts nonresident amended returns that was causing amounts posted to tax code 190 to display as a negative value on line 54 (payments made with original return) of the Form 2.
6/26/2024	Form 3800	Returns will no longer automatically get an electronic filing reject with generation of Form 3800. Computations for lines 8 and 14 were corrected (they were pointed to incorrect items on Schedule I) for non-S portion 3800. S portion 3800 for above line items will be corrected next week.
6/26/2024	Form 8960	Revised computation of Form 8960, line 6 to include any 'excess distributions that are dividends for NIIT purposes as well as any gains that are treated as excess distributions for regular income tax purposes'. Computations for Form 8960, lines 18b (NII distribution deduction) and 19a (NII AGI) were also adjusted to include this same amount. Line 18b (NII distribution deduction) will now equal NII amounts included on the beneficiary K-1(s) rather than the distribution deduction for regular tax purposes which appears on Form 1041, Schedule B. The Form 8960 line 6 and Form 8960, line 13 detail statements have likewise been revised to indicate these changes.
6/26/2024	Form 8960	Corrected text which prints on 'Other Income' and 'Form 8960, line 6' detail to read 'FORM 8621, PART V, LINE 16B' instead of 'FORM 8621, PART IV, LINE 16B'

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
6/26/2024	California	Logic/print was added for California Incomplete Non-grantor Trusts (ING). If identified as an ING trust (no election), the CA 541 will appear as a grantor return (text somewhat different from regular grantor return). Instead of a 541 K-1 being generated, a separate statement which lists summary income/expense items will be generated. This same statement will appear in the beneficiary packet for CA beneficiaries. Note: Currently ING trusts may not be electronically filed with CA on OTT. Current assumption is that any beneficiaries listed in account are 'grantors' and as such each beneficiary's share of distribution will be used to determine percentage of income/expense in the account to appear on CA ING grantor letter.
6/26/2024	Maryland	Corrected issue wherein Form 504, Schedule A, line 9d (fiduciary share of net MD modification) was being incorrectly computed for nonresident Maryland returns.
6/26/2024	Mississippi	Corrected issue where Schedule K taxable income for non-Mississippi beneficiaries on Mississippi nonresident returns was being erroneously computed.
6/26/2024	Nebraska	Revised Form 1041-N such that for estates, both the testamentary and inter vivos boxes will be left blank. This change was also made on the 2022 tax application.
6/19/2024	Pennsylvania	Modified income/principal allocation logic for overpayment applied.
6/11/2024	Form 3800	Added diagnostic to generate when general business credits being carried over from prior year.
6/11/2024	Form 7203	Automated additional line items on Form 7203 including line 6 (Distributions), line 8a (Nondeductible distributions), line 8c (Business credits) and line 46 (Foreign taxes paid). Note: Distributions input will be made available on S Corp input (Other Schedule E) with the 24.03 release.
6/11/2024	Form 8960	Modified computations for lines 4b and 7 for scenarios when there is income reported on Schedule C. Prior to this change, all business income was included on line 4b (non NII portion of line 4a) and the portion of Schedule C income to be treated as NII was included as an other modification to NII on line 7. With this change, line 4b will now only include portion of Schedule C income not to be included in NII (basically that which is coded 'Active'). No adjustment will be made on line 7 with regard to Schedule C income. Note: This change does not impact overall NII reported on return (cosmetic change only).

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6/11/2024	Iowa	Modified logic that populates IA K-1 and PTE-C to take into consideration IA source income overrides entered on 'Nonresident Returns' collapsible section of IA.
5/29/2024	Form 3800	S portion versions of Forms 5884, 6765 and 8882 have been made available.
5/21/2024	Form 1041	Corrected issue wherein 1041, Schedule G, Part 2 line 16 (payments from Form 2439) was not being computed correctly after the 24.02 release.
5/21/2024	Indiana	Print of year (on fiscal year beginning-year field) for IT-41 page 1 was removed (tax year 2023 is already preprinted on form).
5/21/2024	Form 3800	Form 3800 has been released with various limitations including: 1) Carryovers from prior years will not be considered pending changes in a future release. If carryovers from prior year exist, Form 3800 will not generate. 2) Electronic filing of Form 3800 is not currently available pending testing completion. 3) S portion versions of Forms 5884, 6765 and 8882 are not available. S portion versions of these forms will be avaliable for the 5/29/2024 update.
5/7/2024	Form 8621	Added beneficiary footnote regarding portion of excess distribution reported on line 16b of Part V of Form 8621 which was taxed to beneficiary on Schedule K-1, line 5. This footnote details out by PFIC.
5/7/2024	Form 8621	Added other income detail for amounts coming from Form 8621 (by PFIC). The 8621 other income information is broken out into 4 sections based on Part IV/V line number. Detail by PFIC (name/EIN/amount) is provided. Similar detail is provided for Form 8960, Line 6 (Adjustments to investment income for certain CFC's and PFICs).
5/7/2024	Indiana	Corrected issue wherein Part 3 of Indiana K-1 was not being completed for Indiana beneficiaries.
5/1/2024	Hawaii	Corrected print and electronic filing for Form N-362 PTE Credit and Schedule CR.
5/1/2024	Louisiana	Corrected an issue wherein partnership name was not printing on line 19 of the IT-541.
5/1/2024	Wisconsin	Corrected an issue wherein the QBI deduction was not being properly taken into consideration for purposes of electronic filing. This was causing notices to be generated by the state.
4/24/2024	Georgia	Corrected print issue where Schedule 7 (pages 8 and 9 of 501) was being generated when no NOL.

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4/24/2024	Gerogia	Corrected an issue wherein GA estimate vouchers (500ES) were not printing on approved forms.
4/24/2024	Massachusetts	Corrected an issue on the Massachusetts Schedule D, Line 11 (gains on collectibles) to limit the value on line 11 to the amount on line 10 of the Massachusetts Schedule D.
4/24/2024	New York	Corrected an issue for NY amended grantor returns that was generating error code 3006 when being submitted for e-filing. This change is for both 2022 and 2023
4/24/2024	Wisconsin	Corrected issue wherein Form PW-1, Part1A (Additional Information for Tiered Entities) was not printing.
4/19/2024	New York	Corrected an issue wherein the 2D barcode was not printing for Form IT-225 when it printed only with the IT-205-C. Other accounts printed correctly.
4/17/2024	ESBT Worksheet	Removed a reference on ESBT Worksheet that indicated 'Credit carryover to next year'. The amount indicated was incorrect in some instances (the value was not saved to subsequent year tax return). Foreign tax credit carryovers for the S portion of account appear on S portion Form 1116, Schedule B (s).
4/17/2024	Oklahoma	Corrected an issue wherein a tax was erroneously being generated on final year accounts.
4/11/2024	Form 990-T	Based on client feedback, capital gain distributions (tax codes 298, 300 and 507) will no longer automatically be included on 2023 Form 990-T, Schedule D (1041), line 13. As a result, capital gain distributions will no longer automatically be considered unrelated business taxable income (UBTI).
4/11/2024	Form 990-T	Updated 'See Stmt' print on Form 990-T, Page 2, Lines 6c and 6j.
4/11/2024	Arizona	Corrected an issue that was causing certain grantor accounts (where the grantor had died prior to the return being filed) to be rejected.
4/11/2024	Georgia	Corrected alignment of printed fiduciary signature on Form 501X (amended return) such that it would not overstrike fiduciary digitized signature.
4/11/2024	Illinois	Corrected an issue for accounts that had an IL-4562 that was causing reject code IL4562-980-2.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
4/11/2024	Ohio	Modified Ohio state beneficiary message form references. The form references will no longer specify the Schedule A line number for a given adjustment.
4/10/2024	Minnesota	Corrected positioning on Form M2X (amended return) of both the fiduciary and paid preparer digitized signatures. This change was made on 04/10/2024 (not part of Friday batch update).
4/10/2024	Form 5227	Corrected rounding issue wherein gross income reported on Form 5227 was understated by a few dollars. This was causing affected returns to reject.
4/10/2024	Hawaii	Corrected print alignment for Form N-362 PTE Credit including totals.
4/10/2024	Louisiana	Corrected issue wherein pass-through entity addition and subtraction entries (on LA screen) were not being picked up properly on the return.
4/10/2024	Maryland	Corrected electronic filing reject logic for Form 504UP-38590-010 (underpayment penalty).
4/10/2024	Maryland	Corrected issue wherein the 'Formula Method' on Form 504, Schedule A was being utilized when there was gain on sale of U.S. Government bonds. This was causing the return to be rejected. In accounts with sale of U.S. Government bonds, a change has been made to use the 'Alternative Method' on Schedule A.
4/10/2024	Oregon	Corrected issue where Oregon payment to be made with extension (Form 41-V) was not appearing on Extension Summary Register.
4/10/2024	State Extensions (DE, DC, KY)	Corrected an issue that was generating error 904 when filing grantor extensions for Delaware, District of Columbia, and Kentucky.
4/10/2024	Virginia	Corrected electronic filing reject logic for Virginia 770-230.
4/10/2024	Wisconsin	Corrected issue wherein Form PW-1, Part1A (Additional Information for Tiered Entities) was not printing.
4/5/2024	Form 8621	Corrected an issue wherein unreversed exclusions were not printing on Part IV when a mark-to-market gain.
4/5/2024	Form 990-T	We removed a print condition which prevented Form 990-T, Schedule A, Page 1, Columns B & C from printing when the gross income is less than $10,000

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4/5/2024	Maryland	Corrected an issue wherein the nonresident beneficiary deduction statement was not generating.
4/5/2024	Nebraska	Print alignment issues for Form 7004N (extension form) were corrected.
4/5/2024	New Mexico	Corrected issue wherein New Mexico grantor trusts with a withholding requirement were not including withholding amounts on the FID-1.
4/3/2024	Form 8621	Corrected issue with computation of Part IV, line 14b when multiple §1296 dispositions. This issue caused other income on Form 1041 to be overstated.
4/3/2024	Louisiana	Corrected an issue wherein the extension form R-6466 was not printing when an entry was made under 'Extension Information' for 'Total tax liability for tax year (Override)'
4/3/2024	Massachusetts	Generate the Massachusetts schedule of beneficiary distributions statement for accounts that only have amounts distributed to charity (no non-charitable remaindermen/beneficiaries entered).
4/3/2024	New York	Corrected issue wherein the electronic filing reject ' Form IT-205-C the identifying number (EIN or SSN) is missing or invalid' was erroneously generated.
4/3/2024	Rhode Island	Added electronic filing alert indicating that 'Balance due payment information is being included in the e-filed return'.
3/29/2024	Form 1041	Removed electronic filing diagnostic for 4947(a)(2) trusts that was erroneously generating for fiscal year accounts.
3/29/2024	Form 990-EZ	Updated print for the Schedule O checkbox on Form 990-EZ, Page 3.
3/29/2024	Arizona	Corrected an issue for the Arizona extension that was causing processing error code 5102 to be generated.
3/29/2024	Iowa	Corrected Schedule C print issue which impacted lines 19 through 23.
3/29/2024	New York	NY IT-205-J, Part IV was revised to include years back to 2014 and not just the the 5 prior years listed on the form itself. Change was based on email from the state.
3/29/2024	North Dakota	Corrected payment voucher for North Dakota that was not printing for final year accounts.

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3/27/2024	Form 8621	Corrected issue wherein Form 8621, Part IV, lines 14b and 14c were not populating for a given Section 1296 disposition unless an unreversed inclusion entry was entered. Prior to this change, a value (including a zero) would need to have been made for lines 14b and 14c to populate.
3/27/2024	Alabama	Corrected issue wherein reject diagnostic relating to Schedule E was erroneously being generated for grantor accounts.
3/27/2024	California	Corrected issue wherein California statement which supports S portion of ESBT taxable income and tax computation was not printing.
3/27/2024	Electronic Estimates	Changes were made to annualized method with respect to capital gain deduction computations for Arkansas and New Mexico. A change was also made for Wisconsin voucher print.
3/27/2024	Georgia	Corrected print alignment on page 9 of Form 501 (NOL Carryback).
3/27/2024	Maryland	Corrected issue wherein electronic filing reject related to Form 504UP was being erroneously generated for initial year accounts.
3/27/2024	Massachusetts	Corrected a print issue on line 15b of the Massachusetts Schedule B for nonresident returns.
3/27/2024	Oklahoma	Corrected withholding tax rate utilized on Forms WTP10003 and WTP10005.
3/27/2024	Vermont	No change to tax application on 3/27/2024, but a correction to a 2/28/2024 posting regarding Vermont tax computation. The 2/28/2024 posting indicated that a correction was made wherein tax was erroneously computed when taxable income was between $2,051 and $3,050. The posting should have indicated that a correction was made wherein tax was erroneously computed when taxable income was greater than $2,049 and less than $7,150. A scan was originally generated to identify affected accounts with taxable income between $2,050 and $3,050. A new scan will be generated to identify additional accounts, those with taxable income $2,050 to $7,149.
3/27/2024	Wisconsin	Corrected an issue on the Schedule OS (Credit for taxes paid) to treat all income as source income when claiming the credit for taxes paid to Illinois, Michigan, Iowa, and Minnesota.

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3/22/2024	Colorado	In various scenarios, CO Form DR 0104BEP was not included in print file. Generally the issue would occur when the account had Colorado beneficiaries printing prior to non-Colorado beneficiaries.
3/22/2024	Electronic Estimates	Various print changes were made to voucher print for Arkansas, Delaware, Georgia, New Mexico and Virginia.
3/22/2024	Iowa	Corrected issue wherein the Iowa payment voucher was not being generated when an Iowa extension being processed and payment needed to be made.
3/22/2024	Massachusetts	Corrected an issue wherein taxable municipal interest reported on Massachusetts beneficiary's Form 2G for 5227 processed account was incorrect when situs of trust was not Massachusetts.
3/22/2024	Massachusetts	Corrected an issue for Massachusetts accounts that have no recipients or remaindermen but are distributing income to charity. This was causing a business rule reject due to a missing Schedule B/R.
3/22/2024	New Mexico	Corrected a print alignment issue on the RPD-41359 (Annual Statement of Pass-Through Withholding) included in the beneficiary packet.
3/22/2024	Oklahoma	Corrected minor print alignment issue on both the Oklahoma WTP 10005 NR Distributed Income Estimated W/H Tax report and WTP 10003 NR Distributed Income W/H Annual return.
3/22/2024	Oklahoma	Corrected issue wherein the OK 513NR, page 1 header information was misaligned.
3/20/2024	Form 8621	Corrected issue wherein when there were multiple §1296 dispositions (Part IV, line 13 and 14), income was not being properly reported on Form 1041.
3/20/2024	Form 990-T	Electronic filing of Form 990-T is available beginning 3/20/2024.
3/20/2024	Indiana	Corrected an issue wherein an IN Schedule Composite electronic filing validation error was being generated when there was a foreign beneficiary.
3/20/2024	Missouri	Corrected Missouri state beneficiary message form reference to indicate MO-A, Part I, line 11 and not line 10.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
3/20/2024	New Mexico	Corrected an issue wherein nonresident beneficiary withholding tax withheld by another passthrough entity was not being subtracted from the amount the trust would be required to withhold. This caused double taxation on New Mexico source income being distributed to nonresident beneficiaries.
3/20/2024	Pennsylvania 5227	Release of e-file for Pennsylvania 5227 accounts.
3/15/2024	Indiana	Corrected an issue on the Indiana Composite Schedule wherein the residency state was not populating correctly.
3/15/2024	Iowa	Corrected issue wherein federal tax paid (tax code 58) was not reflected as a subtraction on IA return in certain instances.
3/13/2024	Form 1042-S	Corrected issue wherein Chapter 3 and 4 overrides for Section 897 gains were not working.
3/13/2024	Form 1042-S	Corrected issue wherein Chapter 3 and 4 overrides for Section 897 gains were not working.
3/13/2024	Form 8082	An issue has been corrected which kept Form 8082 from being generated.
3/13/2024	Delaware	Print was modified on both the FID-EXT and FID-EST such that the printed fiduciary signature no longer overlays the digitized signature.
3/13/2024	Hawaii	Corrected an issue wherein Form N-40 (nonresident) Schedule G, line 6e was not footing correctly.
3/13/2024	Maine	Corrected issue wherein beneficiary message detail statement was not generated when Maine return processed and there was a state overpayment included in other income on Form 1041 as well as state taxes allowed as a deduction on Form 1041.
3/13/2024	Maine	Corrected issue wherein beneficiary message detail statement was not generated when Maine return processed and there was a state overpayment included in other income on Form 1041 as well as state taxes allowed as a deduction on Form 1041.
3/13/2024	Nebraska	Correct computations for pass-through entity tax credit.

2023 Tax Application Changes

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
3/13/2024	New York	An issue was corrected wherein extensions were getting rejected. This occurred when there was an extension payment computed, but was overridden to be zero per client entry. This change was made for tax years 2022 and 2023.
3/13/2024	Oregon (990)	CT-12 has been released.
3/13/2024	South Carolina	Released SC1041-ES now that approved.
3/13/2024	South Carolina	Released SC1041-ES now that approved.
3/13/2024	Wisconsin	Corrected issue wherein existence of WI capital loss carryover from prior year causing a tax due on final year accounts.
3/8/2024	990 Illinois	Print alignment was corrected on Form AG990-IL.
3/8/2024	Arizona	Corrected issue wherein an electronic filing validation error was occurring when trust's share of fiduciary adjustment was zero.
3/8/2024	Iowa	Corrected issue where Iowa county if entered in lower case was causing electronic filing validation error. Corrected issue wherein Iowa source income was not being computed for IA resident returns with non-IA beneficiaries.
3/8/2024	Maine	Corrected issue wherein beneficiary message detail statement was not generated when Maine return processed and there was a state overpayment included in other income on Form 1041.
3/8/2024	Minnesota	Corrected Form EST (underpayment penalty), line 20 computation.
3/8/2024	Nebraska	Corrected issue wherein K-1 override entry for tax withheld was not working.
3/8/2024	Vermont	Corrected issue wherein FIT-161, line 18 (balance due) was computed incorrectly when total payments (line 14f) was less than total tax liability (line 13) less total payments (line 14f).
3/8/2024	Wisconsin	Corrected issue wherein PTE representative information was not being utilized correctly when creating electronic filing data.
3/8/2024	Wisconsin	Corrected print issue wherein Forms 2WD, 2K-1 and Schedule U were erroneously being generated with 5227 processed accounts.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
3/6/2024	Form 5227	Correct an issue wherein charitable lead trusts and pooled income funds were erroneously generating electronic file reject (business rule F5227-017).
3/6/2024	District of Columbia	A correction was made for accounts that had a credit for taxes paid to other state(s). Previously if the credit offset all DC tax resulting in zero tax liability, a XML validation error was created.
3/6/2024	Federal	Changes have been made to the program for grantor accounts wherein overpayment was applied from the prior year. Previously overpayment applied appeared on both 1041, page 3 as retained in the trust and also on the grantor tax letter. Now overpayment applied from prior year will be treated similarly to estimated tax payments with respect to grantor accounts. For grantor accounts, the system automatically reports all estimated tax payments on the grantor letter (and not 1041) unless a Form 1041-T is generated or an indication has been made to otherwise retain in the trust.
3/6/2024	Georgia	Installment dates reported on 500-UET were updated.
3/6/2024	Kentucky	Kentucky K-1 print was modified to minimize truncation given that Kentucky only allows 3 lines to print the name and address for a given beneficiary.
3/6/2024	Michigan	Corrected issue wherein a reject diagnostic stating that there were too many capital gains transactions on MI-8949 for the return to qualify for electronic filing was erroneously being generated.
3/6/2024	Missouri	Corrected an issue for non-grantor accounts that caused rejects at the state for missing data in the electronic file
3/6/2024	Nebraska	A correction has been made to the Nebraska Pass Through Entity Tax Credit computations.
3/6/2024	Oregon	Corrected Oregon Surplus kicker credit computation. Prior to this change, the credit was not being computed. The credit is equal to 44.28% of the 2022 OR Tax Liability less any 2022 credit claimed for income taxes paid to another state.
3/6/2024	Vermont	Corrected a computation issue wherein Vermont state overpayment applied was always reducing the amount reported on line 1 of FIT-161. Note that a reduction in VT taxable income for state overpayment is only necessary when state taxes were added back to VT taxable income in the prior year (and that only happened if there were no distributions in the prior year).

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
3/1/2024	Hawaii	Corrected print alignment for Form N-362 PTE Credit.
3/1/2024	Nebraska	A diagnostic was removed which erroneously indicated that NE Form PTC was not available. Corrections were also made to Form PTC including changes to print alignment as well as logic to compute the 'Nebraska Community College Property Taxes You Paid' column.
3/1/2024	North Carolina	Corrected issue where nonresident deduction was being computed incorrectly for simple trusts with negative DNI and capital gains.
3/1/2024	Vermont	Corrected alignment issue (FEIN and year end) on Schedule FIT-162.
3/1/2024	Wisconsin	Corrected Form 2WD, line 28 to reflect 3,000 rather than 500 (maximum capital loss allowed)
2/29/2024	Vermont	A correction was made wherein tax was incorrectly being computed when taxable income was between 2,051 and 3,050. A scan is being run to identify affected accounts. Note: Above is original text. The range impacted was actually when taxable income was greater than 2,049 and less than 7,150.
2/28/2024	Form 1042-S	For income codes 27, 57 and 58 (those automatically computed), the tax rates saved back to the database were incorrectly formatted. A data fix is being applied for accounts processed before that date to correct the rates saved on the database such that the 1042-S for these income codes can be electronically filed.
2/28/2024	Form 1116	An issue has been corrected wherein foreign branch income category of income was not being included in the Form 1116, Schedule B electronic file properly. This caused an electronic filing validation error.
2/28/2024	Alabama	Corrected a beneficiary percentage rounding issue on which which caused business rule SK1-AL41-002 to be generated preventing electronic filing.
2/28/2024	Colorado	Corrected an issue wherein an electronic filing validation error was being generated when there was credit for taxes paid to other states.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
2/28/2024	Iowa	Corrected following issues: 1) K-1 overrides entry to indicate IA beneficiary is exempt from filing PTE-C was not working. 2) Pass-through entity tax credit was not causing Schedule CC to generate and was not appearing on line 41 of IA 1041. 3) Amount of composite tax reflected on IA PTE-C for each beneficiary was not automatically populating on the IA K-1, Part IV.
2/28/2024	Maryland	The printed fiduciary signature line was also moved so that it would not overtly overstrike the fiduciary digitized signature. Corrections were made as well to underpayment penalty computations (Form 504-UP).
2/28/2024	Montana	Electronic filing of Montana grantor returns has been released.
2/28/2024	Oklahoma	Corrected a 513-NR print alignment issue which occurred when account was run as a projection.
2/24/2024	Connecticut	Modified fiduciary adjustment allocation such that for a cemetery perpetual care fund the adjustment will always be allocated to the trust.
2/23/2024	Form 5227	Business rules (automated system) F5227-01 and F5227-06 have been been temporarily disabled pending logic/text corrections (these rules will be corrected/enabled on 3/1/2024).
2/23/2024	Form 5227 (IRS Communication on Business Rule F5227-006)	OTT recently received IRS response regarding what taxpayers should do for split interest trusts (not in year of termination) which have no further income beneficiaries entitled to receive payments (perhaps deceased). The IRS response was as follows: 'Our tax law specialists have completed the review of the sample return provided. The following actions are needed. 1) The org should check Part IX, Section A, Line 2. Line 2 should be checked if all of the split-interest trust's income interests expired before 2023," which requires the organization to then attach an explanation if the return is not a final return. 2) Also, as a workaround for this year, the filer should also make an entry in Schedule A, Part III, column (a) such as "No current income beneficiary; final distribution pending" and for column (b) provide the TIN of a pending recipient of the final distribution. If the filer needs additional assistance, please have them contact the eHelp Desk so we can handle the actual return'
2/23/2024	California	Corrected alignment issues on CA 541-A.
2/23/2024	Maryland	The printed fiduciary signature line was moved such that it would not overtly overstrike the fiduciary digitized signature.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
2/23/2024	New Mexico	A correction was made wherein a XML validation reject diagnostic was erroneously being generated. This occurred when there was one or more beneficiaries in the account for which print was suppressed due to no distributions.
2/23/2024	New York	Corrected an issue where tax year 2022 information was not being reflected on IT-205-J, Part 4, line 35.
2/23/2024	North Carolina	Corrected an issue causing returns with the "All undistributed income is held for the benefit of a resident beneficiary that meets the facts and circumstances of the North Carolina Department of Revenue v. The Kimberley Rice Kaestner 1992 Family Trust, 139 S. Ct. 2213, 2221 (2019) ruling" box checked to double count capital gains/loss for computation of Schedule B.
2/23/2024	Oklahoma	Corrected print alignment issue on Form 513 for amended and final boxes. The printed fiduciary signature line was also moved so that it would not overtly overstrike the fiduciary digitized signature. The tax rate which is applied against composite Qualified Funeral Trust (QFT) taxable income was changed (OTT always applies lowest rate for composite QFTs and lowest rate changed for 2023).
2/23/2024	Rhode Island	Various changes were made including: Schedule PTW- Line 2 now reflects all RI source income computed included in the federal distribution deduction. Line 3 - This now reflects portion of line 2 that was distributed to non-RI beneficiaries. RI Schedule K-1 - Section IV, line 1 print alignment modified. Modified computations for Section IV such that it will automatically pull information from PTW vs having to use K-1 override functionality. A change has been made to include the RI K-1 in the beneficiary packet (front on print file) when RI source income included on page 2 of the RI K-1 for non-RI beneficiaries. Note: RI revenue department has indicated they will be changing K-1 instructions to allow for Sections II and III of K-1 to be completed for beneficiaries (we requested they change instructions which previously explicitly indicated not to complete for beneficiaries). RI-1041 A change was made such that an entry on 'Withholding from pass thru entities' will now flow to line 15d and not 15e.
2/23/2024	South Carolina	The SC2210 was released as the form has now been approved.
2/23/2024	Utah	Print alignment was corrected on the TC-41 for tax due and pay due lines.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
2/23/2024	Virginia	Electronic filing reject logic for rules 770-210 and 770-555 were modified to prevent processing from being stopped if conditions met.
2/23/2024	Wisconsin (Mandatory for Electronic Filing)	In Options and Overrides, two new Compute - States rows have now been added applicable for tax years 2023 forward. In order to electronically file the Wisconsin return, these two fields MUST be completed. The options read as follows: Pass-Through Entity Representative Contact First Name (Required for WI electronic filing) (Option applicable beginning tax year 2023) Pass-Through Entity Representative Contact Last Name (Required for WI electronic filing) (Option applicable beginning tax year 2023)
2/21/2024	Federal	Corrected an issue wherein capital loss carryover diagnostics were indicating that carryover was to tax year 2023 and not 2024.
2/21/2024	Form 1042-S	Corrected an issue wherein Chapter 4 status codes 03 and 04 were not available for selection in the OTT interface for tax year 2023.
2/21/2024	Form 1116, Schedule B Electronic Filing	An issue was corrected wherein an error code 3006 was generated when returns which met certain parameters were submitted for electronic filing. Accounts that had Form 1116 generated with a value on Form 1116, Part III, line 10 (carryover of foreign taxes) will need to be reprocessed. Accounts that had a Form 1116, Schedule B but no Form 1116 generated for such category of income were not impacted by this error.
2/21/2024	Form 990-PF	Corrected alignment issues on 990-PF, Part III.
2/21/2024	Connecticut	Corrected an issue wherein a statement reference was overstriking preprinted text on CT-1041, Part 1, Schedue A.
2/21/2024	Hawaii	Corrected a print alignment issue (fiduciary address) on HI K-1. This issue was specific to 5227 processed accounts.
2/21/2024	Illinois	A correction was made to the print alignment of trust and fiduciary name on IL-1041.
2/21/2024	Iowa	Corrected print alignment of the fiduciary prepared date on IA 1041.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
2/21/2024	Kansas	Corrected a couple of issues which were causing a XML validation reject diagnostic to generate. The first scenario corrected occurred when there was one or more beneficiaries in account which had no distributions and as a result such beneficiaries were being suppressed from print (and MEF). The other issue had to with account situs being set to 'Not Needed'.
2/21/2024	Kentucky	A change was made such that pass-through entity tax credit entered on 'Other Schedule E' will automatically flow to Form 741, line 20(c).
2/21/2024	States	Corrected an issue wherein Rhode Island diagnostics were erroneously being generated when the Rhode Island return was not being processed, but there was one or more Rhode Island beneficiaries in the account.
2/16/2024	Form 1042-S	Corrected issue wherein withholding amounts associated with income code 57 were not being included in total which prints on consolidated version of Form 1042-S.
2/16/2024	Form 1116, Schedule B	A correction was made to Form 1116, Schedule B, line 1 computations. This modification occurs when foreign tax carryover information which appears on Tax Review -Tax and Credits | Form 1116 - Foreign Tax Credit | Carryovers section in 2023 does not accurately reflect what appeared on the 2022 Form 1116, Schedule B, line 8.
2/16/2024	California	Form 5805 (Underpayment) is being released now that the form has been approved.
2/16/2024	Maryland	A correction was made to county tax rates for both Anne Arundel and Frederick counties.
2/16/2024	Maryland	A change was made such that Form NBD if generated will include all beneficiaries (not just non-Maryland remaindermen beneficiaries)
2/16/2024	Minnesota	A change was made such that with respect to Schedule M2RT, line 6a, all beneficiaries will now print when at least one is a Minnesota resident.
2/14/2024	Agent/Custodian Letter (1041 Processed Accounts)	Corrected an issue wherein Form 8948 (Preparer Explanation for Not Filing Electronically) was erroneously being generated for agency/custodial accounts.
2/14/2024	Connecticut	Corrected an issue on CT-1041, page 3, wherein the 'SEE STATEMENT' message was overlapping line 9.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
2/14/2024	Illinois 5227	A new version of AG990-IL was released. Previously 5227 processed accounts that contain this form will need to be reprocessed.
2/14/2024	Rhode Island	Corrected an issue which occurred when a beneficiary was from Rhode Island, but the state of Rhode Island was not attached. In that instance, the Rhode Island K-1 correctly generated, but was mostly blank.
2/9/2024	Form 1116	An issue was corrected which occurred when the Compute - Federal Option 'Treat Foreign taxes as a deduction against income in lieu of a foreign tax credit ...' selection was 'Yes'. When 'Yes', the system was correctly treating the foreign tax as a deduction against income, but incorrectly was allowing it as a potential foreign tax credit to the trust and/or beneficiaries.
2/9/2024	Form 5227	Corrected an error wherein amounts reported on Form 5227, Part II (Schedule of Distributable Income), line 3 (Total distributable income, column b (Capital gains (losses)) did not properly reflect netting. The correct amounts were reflected on the supporting statement as well as Form 5227, Schedule A line 1 so 2024 carryforwards were not impacted.
2/9/2024	Arizona	A change was made to prevent an electronic filing validation message from generating when there is no fiduciary adjustment on either line 10a or 10b of the AZ-141. If no Arizona fiduciary adjustment, a 'NONE' will now print on line 10b and the validation message will no longer generate.
2/9/2024	Kentucky	A change was made to prevent an electronic filing validation message from generating when trust accounting income (TAI) is negative.
2/9/2024	Massachusetts	Corrected an issue wherein Massachusetts overpayment was never being applied to the 2024 tax year (Form 2, line 59).
2/9/2024	Massachusetts	Corrected an issue on Form 2G wherein the checkbox selected for type of ID number was in error.
2/9/2024	Massachusetts	Corrected a computational issue on the M-2210F annualized worksheet schedule. This error caused M-2210F, line 8 (required installment) to be incorrect.
2/7/2024	Form 1116	A change has been made such that return will not reject for electronic filing purposes when foreign country is 'Various'.

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DATE OF CHANGE	FORM/STATE	DESCRIPTION
2/7/2024	Form 1116, Schedule B	A correction was made such that line 5 will now be presented as a negative amount. While presentation did not impact computations or amount of foreign tax to be carried over, it did cause the return to be rejected for electronic filing purposes.
2/7/2024	Form 8948	Form 8948 (Preparer Explanation for Not Filing Electronically) will now be generated for 5227 return types when applicable.
2/2/2024	CT-1041 K-1	An issue was corrected wherein the trust EIN which prints on page 2 of the Connecticut K-1 included in the beneficiary packet was misaligned.
1/31/2024	Form 1116	Corrected an issue wherein Form 1116, Part IV, lines 25 - 31 was unnecessarily being generated when only one category of foreign income. This caused an electronic filing reject diagnostic (F1116-007-01) to be generated when the account was processed as a tax return.
1/30/2024	Form 1116	Corrected an issue wherein electronic filing reject F1041-068 was erroneously being generated. Note: This correction was not made until approximated 4 PM CST on 1//31.
1/17/2024	Form 1116	Corrected an issue wherein the foreign country name was not printing on Form 1116 as well as interrelated issue wherein proper treaty rate was not being applied to retained foreign taxes on a country by country basis.
1/11/2024	Pennsylvania	The state of Pennsylvania was made available for processing on 1/5/2024 in error. The state may not currently be processed on the 2023 system. Any 2023 Pennsylvania returns processed prior to 1/12/2024 will need to be reprocessed once the state is released.
1/4/2024	Form 1099-R	Form 1099-R recipient instructions relating to recharacterized contributions were corrected (year updated).