

CCH PERSONAL TAX – KNOWN ISSUES (18 October 2019)

Below is a list of issues reported since the April release that potentially impact a significant number of users.

Our aim is to rectify these issues within 12 months but ideally within the next two quarterly releases.

DATE RAISED	ITS	DESCRIPTION	WORKAROUND (If Available)/NOTES	SCHEDULED/ FIXED
16/10/2019	ITS 59200	Expat - 'Proof of Equalisation - Partial' - 'Total Income Tax Due' Does Not Equal the 'Gross Up	None	2020.1 Candidate
27/06/2019	ITS 59064	SA105 Box 45 restricted finance costs brought forward may be incorrectly populated. After an IR Mark has been created, upon re-visiting the online filing screen a Data Has Changed message appears.	Access the SA105 tick to override 45 and enter 0 then save and close.	2020.1 Candidate
23/05/2019	ITS 59012	SA106 Where multiple properties exist for the same country a single set of the SA106 pages are produced and all the values amalgamated, with the exception of unused Finance Costs brought forward, Only the value for the 2nd or if more, last property entered appear in box 24.2	Add up all the unused finance costs and make the entry in the final property.	2020.1 Candidate
03/05/2019	ITS 58979	SA900 Since 2019, UT Interest paid Gross should be reported in box 9.1 it is incorrectly appearing in box 9.4 (as in previous years).	If left in box 9.4, the return validates for online filing and the tax position is correct, so there is no real need to change this for now; however if you wish to report this in the correct box, add the unit trust interest to the bank interest screen to report in box 9.1.	2020.1 Candidate
09/04/2019	ITS 58941	SA905 Box 5.10 missing or doubled value	Queries still outstanding with HMRC	TBA

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Fixed Items				
30/09/2019	ITS 59182	SA100 Gross Up – Expat users only Where the Remittance Basis of Taxation has been claimed and the taxpayer is not claiming personal allowances, the gross up calculation is not giving the Personal Savings Allowance (against the savings income) in the gross up calculation. It is working fine when the Arising Basis is claimed.	No workaround	2019.303 Hotfix
26/07/2019	ITS 59122	Working Notes – Error When attempting to add a working note to a return sometimes it failed with the message – Object not set to an instance of an object. Upon investigation this was due to a working note appearing in the old Business TAX record for 2009/10.	Review prior year’s returns for any internal memo (working) notes. If they can be deleted, this should clear the error message.	2019.3
22/07/2019	ITS 59112	SA101 Pensions Savings Tax Charges – Where a case has annual allowance figures brought forward as a result of claims made in earlier years form, SA100 Page 2 box 9 is incorrectly ticked and form SA101 is incorrectly included.	Returns with an existing IR Mark need reviewing before submission. See KB11116 for more guidance.	2019.2
12/07/2018	FYI	As per the Pensions Tax Manual for Scottish Tax Payers “For tax year 2018-19 onwards, the Scottish rates are the basic, intermediate, higher and top rates (the lowest possible rate at which the annual allowance charge applies for a Scottish taxpayer is the Scottish basic rate; the Scottish starter rate does not apply).” As per the HMRC comp this is not happening; we have contacted HMRC to clarify the position.	HMRC has advised this will be Special ID33 we have coded this for 2019.3	2019.3
17/04/2019	ITS 58956	SA106 If you have a foreign property with a profit but losses brought forward that reduce it to nil, a value appears in box FOR30F on page 5 but no figure in box 30. We have raised this with HMRC as it is a change for 2019 but has worked well in previous years.	There is no workaround possible for this. We will look to try and include a workaround for this in 2019.2 by entering a 0 in box Box 30.	2019.2

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10/04/2019	ITS 58942	SA800 – Short statement – date started missing for some partners Where new partners have joined a partnership (and a date appears in the Partnership tab in the client record) although the partnership statement data screen shows these dates, only odd numbered partners show them on the SA800 partnership statement (page 7). E.g the second and fourth partner have their date missing.	Add a white space note	2019.1 SP1
09/04/2019	ITS 58939	SA900 validation hanging - CGT property details	Go into CGT, into the Disposal Full Details, Further Information and type some text into the Further Information box	2019.2
09/04/2019	ITS 58938	SA900 page 12 – none of the boxes are being populated.	No work around. Values appear in data entry screen but are not appearing on the actual form	2019.1 SP1
08/04/2019		Car benefit percentage needs updating to 2018/19	Calculate the amount of car benefit and enter the figure directly onto the data entry screen	2019.1 SP1
05/04/2019	ITS 58930	Info Request - employment section no longer includes benefits or expenses	Run the Info Request prior to installing the update if timing allows, or visit KB article 11028 for a fix file if you have installed 2019.1	2019.1 SP1
01/04/2019	ITS 58914	Incorrect error message appears where Tax Paid on Pension Contributions is less than Excess	Although this could be misleading it is still possible to generate an IRMark and submit the return online.	2019.3