



# Release Notes for 6-in-1 Version 2023-090

We're delighted to announce the second major release of 6-in-1 for 2023.

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## 2nd Release This Season

1. [2023-024 \(01/24/2023\)](#)
2. 2023-090 (03/31/2023)

## Introduction to 2nd Release (2023-090)

### Installation Password

The password for installing the update is: [showtime](#)

### Usage Statistics

Counting firms that have installed 6-in-1 on or after 2/15/2021 (almost 24 months ago) through 3/31/2023, 6-in-1 launch counts for users of 6-in-1 are as follows:

|                                  | 2/15/21 – 2/15/22 | 2/16/22 – 3/31/23 | Total   |
|----------------------------------|-------------------|-------------------|---------|
| <b>Firms:</b>                    | 731               | 860               |         |
| <b>Users (via “Device ID”):</b>  | 3,157             | 5,032             |         |
| <b>Launches (6-in-1 opened):</b> | 200,082           | 286,695           | 486,777 |

## 2023 Update (for 2022 forms)

This version includes the following updated forms for 2022:

### E-File Status

|      |                 |
|------|-----------------|
| 1041 | <b>Approved</b> |
| PA   | Approved        |
| CT   | Approved        |
| DE   | Approved        |
| MA   | Approved        |
| NJ   | Approved        |
| NY   | Approved        |
| OH   | Approved        |
| VA   | Approved        |



## Paper File Status

| Form or State | Status                                   |
|---------------|--|
| 1041          | Approved                                 |
| 709           | Approved                                 |
| 706           | No new 706 for 2022                      |
| PA            | Approved                                 |
| CT            | Approved                                 |
| DE            | Optional (not submitted for approval)    |
| IL            | Approved                                 |
| IN            | Approved                                 |
| MA            | Approved                                 |
| NC            | Approved                                 |
| NJ            | Approved                                 |
| NY            | Not permitted; must e-file the NY IT-205 |
| OH            | Approved                                 |
| VA            | Approved                                 |
| WI            | Approved                                 |

## Highlights for the 2023 update

### Beneficiaries

- [Mac only] New relationship dropdown menu (A-G, H-Z) was not entering menu choice into relationship field. Fixed.

### DE Inventory

- New form
- Miscellaneous: amount in right column now appears. The amount field was one pixel too high.
- DE Inventory Dropdown menu in Transact now correctly shows the schedule letters as reversed by the new DE form (Schedule B/Joint became D/Joint, and Schedule D/Stocks & Bonds became Schedule B/Stocks & Bonds)
- Automatically prints blank schedules again with "None" displayed in the middle



## Transactions

- PA Exempt Interest/Dividends: allows for exemption percentage. If you copy one of these records, then change the code to regular interest/dividend, the exemption percentage (now hidden) was reducing the taxable portion. The exemption percentage is no longer active in this scenario.

## All Modules

- [Mac only]: Print to PDF is now printing entire document to PDF (including attachment pages)

## Codes

- Added 26.18 (Short-Term Gain Income)

## 706 (bottom of Page 1)

- Now suppresses firm name if self-employed
- Now suppresses firm name if not self-employed but firm name is empty

## 709

- Gift-Splitting (Page 1, Box 12). Alt-Click now allows you to choose gift-splitting even if you haven't created a spousal return
- Gift-Splitting help screen: Now makes it clear that, if the donor is the only one making gifts, then no gifts should be entered in a consenting spouse's record. Half of the donor's gift will appear in the UPPER half of Page 2, Parts 1-3, of the donor's return. The other half will appear in the LOWER half of Page 2, Parts 1-3, of the consenting spouse's return.
- If you meet the two exceptions (each with three conditions), you do not need to file a spousal return even if you are gift splitting (and even if the other half of these gifts would normally appear on a consenting spouse's return).
- If you do prepare and file a consenting spouse's return, you should mail both returns to the IRS in the same envelope.
- Page 5, Line 2, GST checkbox. Checkbox now lights up in blue when you select. Conversion from FileMaker 11 to FileMaker 19 drops conditional background colors, so we have made sure to reset these background colors after each conversion.
- Consenting spouse blank gift (no gift value) with default exclusion (currently \$16,000) was including that exclusion on Page 3, Line 2, of the consenting spouse's return. This is no longer the case.
- 2022 gifts: default of \$16,000 exclusion was correct. But if you overrode that number to an amount over \$15,000 (2021 exclusion amount), you were getting a message that 2022 exclusion was limited to \$15,000. That message has now been corrected to



\$16,000 for 2022. Note: the exclusion will jump another \$1,000 to \$17,000 for 2023 gifts.

- 2021 gifts: Create New Record again defaults to an exclusion of \$15,000 (rather than \$16,000 as was being set by version 2023-024).
- Page 4, Portability Details: Button now properly navigates to 2022 page (rather than 2021 page), then back to 2022 Page 4.

## 1041

- Attachment schedules for old tax payment lines 24a, 24d, and 24e now renamed to G\_10, G\_13, G\_14.

## 2022 Auxiliary Forms (C, E, F, etc):

- Form 5227, Page 5: missing checkboxes in upper right reinstated.
- Various Yes/No buttons now properly setting/unsetting results

## NC D-407 (fiduciary income tax)

- Tax rate changed from 5.25% to 4.99% (first change since 2019). This rate was not published by NC in the usual places, but only on the version of the form that one would use to hand-write a return.

## PA Fiduciary Income Tax (2022)

- 645-equivalent election to combine estate and one or more trust PA-41 returns. Refined logic relating to rule against netting losses on one return against gains on other returns for certain PA-41 line numbers.

## PA Accounting Distribution Schedule

- Removed logic that was suppressing display of transaction name/description on Schedule D (Distributions).