CCH Axcess™ Tax

2015-5.5 Release Notes

February 19, 2017

CCH Axcess™

At the Center of the Firm in Motion

Contact and Support Information

Return to Table of Contents.

Product information can be accessed by visiting Customer Support online: CCH Axcess Product Support.

In addition to product and account information, the Customer Support site offers answers to our most frequently asked questions, forms release status, Knowledge Base articles, training videos, and operating systems compatibility for each CCH Axcess™ module. Access to these features is available 24/7.

The following Web site provides important information about the features and updates included in all CCH Axcess Tax releases: Release Notes.

Visit the Application Status Web page to view the current status of our CCH Axcess applications. The Application Status Web page is updated every 15 minutes.

Go to Contact Us to find Support calendars, as well as options to enter Web tickets for assistance.

Information in Tax Release Notes

Return to Table of Contents.

CCH Axcess™ Tax Release Notes inform you of the enhancements and updates that were made to Tax products and systems with the current release.

Information provided in the Release Notes include the following:

- Contact and Support information
- Updates to Tax technology (such as, electronic filing updates, Organizer, Pro Forma/roll forward, and technology enhancements)
- Updates made to Tax products (such as, form additions and updates, changes in diagnostics, and changes caused by regulatory updates)

To access a list of CCH Axcess™ Tax Release Notes for the current year and for prior years, visit the Release Notes page on our Customer Support site.

Highlights for Release 2015-5.5

Return to Table of Contents.

Tax Updates

Roll Forward

Individual

Colorado. The 2015 sales tax refund is no longer included in the State Taxable Refund amount on Other Income > Refunds of State and Local Income Taxes for refund returns.

Fiduciary

- **Arkansas**. Nonresident returns no longer transfer 2015 tax due as a refund on Income - Other Income > State Tax Refund section.
- **Colorado**.
  - Resident and nonresident returns no longer transfer 2015 tax due as a refund on Income - Other Income > State Tax Refund section.
  - The prior year taxes paid in the current year transfer to the Payments/Penalties - Payments > State Estimated Payments > Prior year taxes paid in current year.

Tax Product Updates

Individual (1040) Product Updates

Return to Table of Contents.

Federal

If a prior year conversion or traditional IRA distribution was made to a Roth IRA, there was not a prior year Roth IRA distribution, and there was prior year basis in Roth IRA contributions not reported on a separate occurrence, roll forward will carry the prior year basis in Roth IRA contributions to the 2016 Form 1099-R.

Estate & Gift (706/709) Product Updates

Return to Table of Contents.

New Jersey

Form IT-Estate is updated for revisions posted by New Jersey.