CCH Axcess™ Tax

2016-2.4 Release Notes

February 5, 2017

# 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 2016-2.4

Return to Table of Contents.

## Electronic Filing

### Reminders Regarding New Electronic Filing Requirements for Tax Year 2016

#### Individual

- **Ohio**. Ohio now requires Driver's license/state identification information for electronic filing. You must enter the ID entries or make an affirmative selection of "No ID" to electronically file.
- **Mississippi**. We will issue a diagnostic for Mississippi informing you to only use the "No Identification" option for driver's license/state ID if in fact the taxpayer has no identification. We will continue to update our logic as taxing authorities issue guidance for this area.

#### Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization

- **Officer ID**. State requirements for electronic filing for most state returns now require the inclusion of an ID for the return signing officer. This ID is the Social Security number for the signing officer. States also allow the federal employer identification number (FEIN) as an ID for the signing officer, if applicable.

  **Notes**:

  - If you do not provide this information, your return will not qualify for export.
  - The following states do not require the signing officer ID:
    - California
    - Florida
    - Michigan
    - Rhode Island
    - Texas

- **W-2s**. We no longer require the number of W-2s for electronic filing, as we have determined that this is not necessary; you will no longer see a disqualifying diagnostic for federal or any state.

### Approved Products Available on this Release

The following federal and state products are approved and available on this release:

#### Individual

| | | |
|---|---|---|
| California LLC Extension | Louisiana Nonresident | Ohio Cities NonRITA |
| Iowa | Louisiana Extension | |
| Louisiana Resident | Mississippi | |

### Partnership

| | | |
|---|---|---|
| Alabama PPT | Massachusetts Composite Return Extension | Texas |
| District of Columbia Extension | Montana | Texas Extension |
| Indiana | New Mexico | Vermont |
| Massachusetts | New Mexico PW-1 | Wisconsin PW-1 |
| Massachusetts Extension | Rhode Island | |

### Corporation

| | | |
|---|---|---|
| Alabama | Missouri Consolidated | Texas |
| Alabama Consolidated | New Mexico | Texas Consolidated |
| Alabama CPT | New Mexico Consolidated | Texas Extensions |
| Colorado Consolidated | New York City | Virginia Consolidated |
| District of Columbia Extension | New York City Extensions | Vermont |
| Detroit | New York City Estimates | Vermont Consolidated |
| Detroit Consolidated | Rhode Island | West Virginia |
| Massachusetts Consolidated | Rhode Island Consolidated | West Virginia Consolidated |

### S Corporation

| | | |
|---|---|---|
| Alabama PPT | New Mexico | Texas Extension |
| District of Columbia Extension | New Mexico PW-1 | Vermont |
| Detroit | Rhode Island | Wisconsin PW-1 |
| Indiana | Texas | |

### Fiduciary

| | | |
|---|---|---|
| Delaware Extension | Tennessee | Vermont |
| New Hampshire | Tennessee Extension | Vermont Extension |
| New Mexico | Texas | |
| North Dakota | Texas Extension | |

### Exempt Organization

| | | |
|---|---|---|
| New York | New York Extension | New York Estimates |

## 2016 Electronic Filing Status System

**Print Reject Reports**. We have restored the ability to print Reject Reports. You may simply click on the Print button inside the Reject Report, now located to the left of the Export button.

# Tax Product Updates

## Individual (1040) Product Updates

Return to Table of Contents.

### Federal

Letters and Filing Instructions. When the Direct Deposit/Debit Report is suppressed from the client copy, the paragraph concerning direct deposit of a refund or direct debit of a balance due will be produced.

### Michigan Electronic Filing

Employee benefit returns will no longer reject when Employee Benefit is entered on Electronic Filing > Electronic Return Originator - Overrides > Non-paid preparer option.

### Minnesota Electronic Filing

Minnesota requires paid preparer information to be present when a return is created by a Professional Tax Product. Diagnostic 43471 issues when paid preparer information is not present.

### Ohio

Form SD 100ES, Page 2, Line 1, now includes self-employment income.

# Partnership (1065) Product Updates

Return to Table of Contents.

## Federal

The annual report instructions will now print in ALL CAPS when that option is selected.

## New York

Form IT-204.1 will now populate with only partnership or LLC members in the return.

## Ohio

Form IT K-1 (4708), Depreciation section, will now be completed.

# Corporation (1120) Product Updates

Return to Table of Contents.

## Virginia Electronic Filing

In compliance with Virginia's Business Rule 500FED-005, Form 500, Line C(2), will only fill if there is an amount on Virginia's Schedule 500FED, Line 3. An informational only statement for the Virginia Net Operating Loss Carryforward adjustment will be installed on a later release.

# Fiduciary (1041) Product Updates

Return to Table of Contents.

## Federal

Form 2210. Net Investment tax will not be included on Form 2210, Page 1, Line 2, for foreign trusts.

Grantor Letter. The grantor letter will report DPAD information from passthrough entities.

## Illinois

Form IL-1041, Page 3, and Form IL-1041X, Page 3, will now pull the preparer PTIN from the return configuration set, when entered.

## Kansas

Form K-41ES will now print with the return, when applicable.

## Kansas Electronic Filing

Form K-41 letters and filing instructions will now show no payment is required when the balance due is below the $5 minimum.

## Minnesota

Custom Filing Instructions. Special Instructions will produce for either mailing address or provide website information for payment of balance due, as applicable.

## Oklahoma

The due date will now display 4/18/2017 instead of 4/17/2017 on Oklahoma letters and filing instructions.

# Estate & Gift (706/709) Product Updates

Return to Table of Contents.

## Federal

Diagnostic 20103 no longer issues when DSUE from a predeceased spouse causes the applicable credit amount to exceed $2,125,800.