

CCH Access™ Tax
2017-2.2 Release Notes

January 21, 2018



CCH Access™
At the Center of the Firm in Motion

Contact and Support Information	2
Information in Tax Release Notes	3
Highlights for Release 2017-2.2	4
Tax Updates	4
Electronic Filing	4
Tax Product Updates	6
Individual (1040) Product Updates	6
Partnership (1065) Product Updates	7
Corporation (1120) Product Updates	8
S Corporation (1120S) Product Updates	9
Estate & Gift (706/709) Product Updates	10

Contact and Support Information

[Return to Table of Contents.](#)

Product information can be accessed by visiting Customer Support online: [CCH Access 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 Access™ 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 Access Tax releases: [Release Notes](#).

Visit the [Application Status](#) Web page to view the current status of our CCH Access 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 Access™ 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 Access™ Tax Release Notes for the current year and for prior years, visit the [Release Notes](#) page on our Customer Support site.

Highlights for Release 2017-2.2

[Return to Table of Contents.](#)

Tax Updates

Individual - Tax Projector

Tax Projector is available in this release, including updates reflecting the Tax Cuts and Jobs Act.

Corporation - New Tax Rate Option

A new option is now available to use the 2018 tax rate of 21% in computing estimated tax on form 1120-W, Estimated Tax for Corporations. By default, we will continue to use the current 2017 tax rates in calculating 2018 estimated tax. Should you decide to use the 2018 tax rate, select the new option on Payments/Penalties > Estimates and Application of Overpayment > Federal Estimates and Application of Overpayment > Use 2018 tax rate (Line 28). In the event the calculated 2018 tax is less than the 2017 tax, a caution diagnostic will be generated alerting you to the potential of being underpaid in 2018.

Electronic Filing

Individual

We received a production schema from the IRS and will begin accepting returns in advance of the January 29, 2018, IRS opening for Individual returns. Returns involving the pending extender legislation, the new medical expense rate, or other open items will continue to disqualify, but qualified returns can be uploaded and released and will be transmitted to the IRS on January 29, 2018.

Approved Products Available on this Release

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

Individual

Arkansas	Michigan Cities	New York City Extensions
Arkansas Extensions	Minnesota	New York City Form 1127
Colorado	Mississippi	North Dakota
City of Detroit	Montana	Oregon
District of Columbia	Multnomah	Pennsylvania
District of Columbia Extensions	New Hampshire Form DP-10	Pennsylvania Extensions
Hawaii	New Jersey	South Carolina
Illinois	New Jersey Extensions	Texas
Iowa	New York	Texas Extensions
Kansas	New York Extensions	Utah
Kansas City Form 108	New York Form 204-LL	Virginia
Kansas City Form 109	New York Form 210	
Maine	New York City	

Partnership

California	Indiana	New Hampshire DP-10
California Extensions	North Carolina	New York City
Connecticut	North Carolina Extensions	New York City Extensions
Connecticut Extensions	New Hampshire BT-Summary	South Carolina

S Corporation

California	Indiana	North Carolina Extensions
California Extensions	Michigan	New Hampshire BT-Summary
Connecticut	Missouri	New Mexico PTW-D
Connecticut Extensions	North Carolina	

Fiduciary

Arizona	Georgia
Arizona Extensions	Virginia
California	Wisconsin
California Extensions	

Exempt Organization

California
New York
New York Estimates
New York Extensions
Virginia

Tax Product Updates

Individual (1040) Product Updates

Return to [Table of Contents](#).

Federal

Form 8889. Line 3 calculates the extra \$1,000 for eligible individuals that reach the age of 55 in 2017.

Letters and Filing Instructions. The Keywords General Information > Basic Data > First Name and Initial - Taxpayer, Middle Initial - Taxpayer, First Name and Initial - Spouse, and Middle Initial - Spouse fields have been updated.

The January 2018 version of Form 2848 is available.

Maryland

Letters and Filing Instructions for Maryland. Form 502D prints "Include your social security number and the words 2018 Form MD502D on your check" when both the form and letters generate.

Partnership (1065) Product Updates

Return to [Table of Contents](#).

Kentucky Cities

The Form OL-S question for the method of accounting will now properly reflect cash or accrual based on the option selected.

Michigan

The Michigan Business Tax and Composite forms are now available.

Corporation (1120) Product Updates

Return to [Table of Contents](#).

Federal

A disqualifying diagnostic for an invalid ZIP / Postal code entered for the account will no longer issue for separately owned accounts.

New tax rate option. A new option is now available to use the 2018 tax rate of 21% in computing estimated tax on Form 1120-W, Estimated Tax for Corporations. By default, we will continue to use the current 2017 tax rates in calculating 2018 estimated tax. Should you decide to use the 2018 tax rate, select the new option on Payments/Penalties > Estimates and Application of Overpayment > Federal Estimates and Application of Overpayment > Use 2018 tax rate (Line 28). In the event the calculated 2018 tax is less than the 2017 tax, a caution diagnostic will be generated alerting you to the potential of being underpaid in 2018.

The January 2018 version of Form 2848 is available.

Power Pack

The statement for Page 2, Question Q will no longer include foreign corporations that owned 50% or more of voting stock, directly or indirectly, at the end of the tax year.

District of Columbia

The gross rentals on Form D-20 will be the same as those on the federal return when creating a combined return.

Michigan

The Michigan Corporate / Business Tax and Composite forms are now available.

S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

Federal

The January 2018 version of Form 2848 is available.

California

Business Entity Power of Attorney Declaration Form 3520-BE replaces Form 3520 for POA Declarations filed on or after January 1, 2018. After the form is prepared, it should be signed by the taxpayer and the information entered using the representative's MyFTB online account. See <https://www.ftb.ca.gov/online/myacct/help/submit-declaration.shtml> for more information.

Michigan

The Michigan Corporate / Business Tax and Composite forms are now available.

Oklahoma

Form 512-S, Oklahoma Small Business Corporation Income and Franchise Tax Return, is now due on Monday, April 16, 2018, for calendar year filers.

Oklahoma

Form 512-S, Oklahoma Small Business Corporation Income and Franchise Tax Return, is now due on Monday, April 16, 2018, for calendar year filers.

Estate & Gift (706/709) Product Updates

Return to [Table of Contents](#).

Federal

The January 2018 version of Form 2848 is available.