CCH Axcess™ Tax

2017-3.5 Release Notes

May 20, 2018

Contact and Support Information

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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

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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 2017-3.5

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Tax Updates

Issues Resolved

- **Working with multiple returns**. We resolved the issue of crashing when the user has two returns open and is clicking back and forth.
- **Tax Transfer Export**. The field IDs are no longer blank when using the option for exporting all government fields and data.
- **Tax Transfer Export**. Jobs showing "partial success" are now completing successfully in Batch Manager.

Electronic Filing

New Diagnostics

Beginning with Release 2017-3.4, new electronic filing disqualifying diagnostics were added for Corporation and S Corporation returns with estimated tax payments for 2017 present in the return. Entries are needed on Federal > General > Electronic Filing > Filing Security Information > Federal Estimated Payments > Date and Payment Method for First Payment and Final Payment to clear the diagnostics. These changes were made to capture requested IRS data elements from the return.

Approved Products Available on this Release

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

Partnership

Missouri - Kansas City

Corporation

- Missouri - Kansas City
- New York
- New York CT-33 Life Insurance Corporation Franchise Tax Return
- New York - New York CT-33 NL, Non-Life Insurance Corporation Franchise Tax Return
- New York CT-33-C Captive Insurance Company Franchise Tax Return

S Corporation

Missouri - Kansas City

Fiduciary

- Kentucky
- Kentucky Extension

Electronic Filing Status System®

EFIN Manager. You will notice new transparency in EFIN Manager. Effective May 4, 2018, you may identify the most recent user who updated an existing EFIN or added a new EFIN via a new *Last Updated by* column in the Edit EFIN window. This information is also available on the main EFIN Manager page by simply hovering over the desired EFIN row.

Note: This data is not available on EFIN additions or updates made prior to May 4, 2018.

Secondly, the Account Number selection format has changed from a list to a check box.

Filtering and Searching for Returns. The Return Type 7004F has been changed to 7004F/8868. Simply go to the Select Columns feature and add the Category column for visibility of an 8868 upload.

Calc Version Column. When you use the Calc Version column, available via the Select Columns feature, you will notice that we now display the calc version using the correct Axcess release nomenclature.

Tax Product Updates

Individual (1040) Product Updates

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California

Form 3805P, Line 2, picks up exclusion amounts entered on IRS 1099-R.

Kentucky

Form 740EXT includes the reason for extension from Extensions > Additional State Information.

Maine

The Maine 1040ES is prepared regardless of the date of death for single filing status returns.

Massachusetts

Schedule X, Line 2, Taxable IRA/Keogh and Roth IRA conversion distributions worksheet begins with gross distribution amounts.

Mississippi

Form 80-108, Part I, includes personal casualty losses from designated disasters.

Form 80-205, Line 58, no longer rounds when amounts entered in the Nonresident/Part-year state overrides are entered and the amounts are not even.

North Carolina

If the return is selected to be filed and signed by Executor or Administrator, the phone number will fill.

Oklahoma

If FC or XX is entered on Oklahoma > General > 1- Residency > 4. State of residence - taxpayer, the input will no longer clear.

Pennsylvania

The Form Schedule C depreciation schedule prints all assets when carrying to overflow.

Income from a New Jersey partnership will flow to Schedule G-L, Line 2f, Column B, without making state use input for New Jersey pro rata share of income.

Rental income associated with an estate/trust no longer shows up on Schedule G-L, Line 2h, Column B, as it is already include in Line 2i, Column B.

Schedule A, Line 3, picks up special interest and bond premium when entered on the same occurrence of 1099-INT.

Pennsylvania - Pennsylvania Cities

Schedule F amounts will flow from Pennsylvania Schedule F to CLGS-32-1, Line 4, when the home city has not been entered.

Tennessee Electronic Filing

Per the state requirements, Tennessee account numbers must be entered as ten digits beginning on Tuesday, May 29th. Account numbers issued prior to May 29th that were nine digits in length must have a leading zero added to comply with the new ten digit format. New account numbers will begin with “1” and not follow the previous format.

Partnership (1065) Product Updates

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Federal

Arizona assets coded as qualified Indian reservation property now calculate depreciation with the accelerated lives.

Corporation (1120) Product Updates

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Arizona

AZ Form 120, Page 1, Box 82F, use federal extension rather than AZ 120EXT, has been updated to be selected only when the preparer requests it in data entry.

New York

Form CT-3, Part 4, Line 15 tax, will no longer print when Line 14 is selected for new business that is eligible for exemption.

Fiduciary (1041) Product Updates

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Alabama

After the due date, the letters instruct you to mail the return as soon as possible instead of the current date when no date to file the return is entered.

New York

The NY K-1 Equivalent will no longer report the IT-217 Farmer's School Tax Credit on Line 9.

Estate & Gift (706/709) Product Updates

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New York

Form ET-14 (3/18 version date) is updated with revisions posted by New York.

Exempt Organization (990) Product Updates

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New York

The New York CHAR500 has been updated to match the latest version published by the state. Updates are presentation only.