

CCH Access™ Tax
2013-3.2 Release Notes

March 30, 2014



CCH Access™
At the Center of the Firm in Motion

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Contact and Support Information

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Product and account information can be accessed by visiting Customer Support online at Support.CCH.com/Axcess. 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 are 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.

Technology Updates

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Electronic Filing

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

Individual

Alabama LLC

Fiduciary

New Jersey, New Jersey Extensions

2013 Tax Updates

Legislative changes announced by Minnesota (Individual filings) and Wisconsin (Individual, Fiduciary, Corporation and S Corporation filings) will be available on Release 2013-3.3, scheduled for Sunday, April 6, 2014.

Tax Product Updates

Individual (1040) Product Updates

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Federal

Alternate Filing Instructions. When an overpayment is present on the return the "Amount of Tax" section of the filing instructions will indicate an overpayment instead of a refund.

BNA Export. When zero is entered as the social security wages on Wages, Salaries and Tips worksheet, the Medicare wages are exported to BNA as HI only wages. AMT adjustments, for PTPs, are exported to BNA.

Extra Report. The Extra Report paragraph indicating that the taxpayer may be 70 1/2 next year and must begin withdrawing amounts from qualified plans indicates that the date is April 1, 2014.

Form 114. Bank account numbers will not be masked when the option to mask bank account numbers has not been selected.

Form 114. The explanation for late filing is included on the spouse's form when it's a joint form, but the option to prepare separate Forms 114 is selected.

Form 2555. The Allocation of Passthrough Income worksheet includes passthrough income when the foreign earned income is overridden on Partnership Passthrough > Activity (Continued) > Foreign earned income - override.

Form 8941. When input is present to cause Form 8941 to exist but all amounts on Form 8941 are zero, Form 8941 is not included in the return when printed or exported for electronic filing.

Schedule E, Page 2. When state information is imported from a business system return, and then all of the state information is deleted, the occurrence of the state input will no longer exist in the return.

Schedule SE. Conservation reserve program payments will no longer carry to Schedule SE, Line 1a, if payments made on a Form 4835 or a passthrough with no SE income.

Tax Equalization. TEQ Form 8959, Line 1 hypothetical column equals FICA/Medicare worksheet medicare wages.

Electronic Filing

Form 114. Disqualifying diagnostic 54895 issues when the maximum value of the account is less than zero.

Form 114. Disqualifying diagnostic 52232 issues when the account number is missing for financial accounts reported in Part II.

Form 114. Disqualifying diagnostic 56470 references the required number of digits for the BSA identifier.

Form 1310. Disqualifying diagnostic 42838 issues when the taxpayer is deceased, there is a refund on the federal return, and Form 1310 has not been prepared because the "Type of Person Claiming the Refund" has not been entered.

Form 2441. Disqualifying diagnostic 40094 issues when the dependent's SSN is '555-55-5555'.

Form 2555. An extra space has been removed from the electronic file so that prior year exclusion amounts taken in the current year do not result in an error.

Form 8938. The financial institution foreign country is included in the electronic file when the country is Nigeria.

Arkansas Electronic Filing

Disqualifying diagnostic 44953 issues when amounts for other income are overridden directly on Form AR1000F/AR1000NR, Line 20.

Disqualifying diagnostic 44954 issues when amounts for other miscellaneous deductions not subject to the 2% limitation are overridden directly on Schedule AR3, Line 26.

California

Schedule C, materials and supplies cost, carries to Form 568, Schedule A, Line 5 (Other Costs).

When the date acquired is not entered for a sale of a personal residence, the California program assumes it is a long-term sale like the Federal Schedule D.

Colorado

Form 104X properly calculates Line 25 and Line 33.

Idaho Electronic Filing

Disqualifying diagnostic 44933 issues if state name is missing from credit for taxes paid.

Indiana

Form ST 8960, Line 9, State total income, no longer includes the addback from Form IN-111, Line 12c, state and local income taxes.

Indiana Electronic Filing

Disqualifying diagnostic 47886 issues when overrides are used on IT-40 or IT-40PNR, Lines 19a and/or 19b, amount to apply to county estimates.

Text for disqualifying diagnostic 43799 for IT-40 and 43801 for IT-40PNR gives more detail of accepted Indiana-supported wage statements for withholding.

Kansas

Schedule S, Part B, Line 20, populates with the business income that is excluded on Schedule S, Part A.

Social security payments flow to the Schedule S, Part A, Line 14, if the taxpayer is a nonresident.

The credit for taxes paid populates K-40, Line 13, when the overrides are used on the Credits worksheet, Credit for Taxes Paid section (KS9, Boxes 30-33).

Kansas Electronic Filing

Spouse suffix is not populated in electronic file when single filing status is used.

Maine

Form 8960, Line 9, for Maine will no longer include total income from federal in the calculation of state income. The new calculation is based on Maine source income adjusted by Maine source adjustments.

Schedule 1, Line 2j, includes state bonus depreciation adjustment from passthrough.

Maine Electronic Filing

Disqualifying diagnostic 44956 issues when Schedule A, Line 3 or Line 10, is overridden and the Educational Credit Worksheet is not prepared.

Maryland Electronic Filing

Disqualifying diagnostic 44937 issues when Form 500CR, Part C-I, Line 3, is greater than the number of qualified employees multiplied by 20% multiplied by \$6,000.

Disqualifying diagnostic 44952 issues if Form 505NR, Line 2/Line 14, do not match the tax table/worksheet tax calculation.

Disqualifying diagnostic 47543 issues when Maryland withholding is present on Form IRS-1099G, and the payer's address is not entered.

Disqualifying diagnostic 42390 and 41525 no longer issue when there are distributions converted to Roth IRAs from Form 8606.

Massachusetts Electronic Filing

The Massachusetts electronic return includes only the Massachusetts copy of the W2 state information when taxpayer is a part-year resident, regardless of the home state entry.

The Massachusetts Schedule SC includes the spouse name and social security number when filing Form 1 as Married Filing Separate.

Michigan

Form MI-4884, Part 2, Column D, includes a distribution code entered on the Other > 8891 - U.S. Info for Bene of Certain Canadian Reg Retire Plans worksheet, General section, Distribution code (MI) field.

Michigan - Michigan Cities

Form CF-1040. Wages for more than one common form city on the same W-2 may now be allocated using Michigan Cities > Income / Deductions > Additional information.

Mississippi

Form 80-401. Ad Valorem credit is no longer limited to 50% of current year tax due.

Schedule A (NOL), Line 7, does not automatically include 1099R distributions for MS residents.

Mississippi Electronic Filing

Disqualifying diagnostic 47668 issues when capital gains/losses are present on Form 80-105, Line 37, or Form 80-205, Line 38, and Schedule D is not included in the return if it is required.

Montana Electronic Filing

Per state specifications, load only FEIN or SSN on MT CC, not both.

Nebraska Electronic Filing

Disqualifying diagnostic 43888 issues when Form 1040N, Schedule III, Line 86g, does not equal the amount on Line 86e minus Line 86f, limited to zero if a negative amount is calculated.

Disqualifying diagnostic 44665 issues when more than one Form 1310N is present in a Nebraska return. This prevents a validation error.

New Jersey

Form 1040, Page 2, Line 19A, for part-year resident now includes the allowable pension exclusion on Line 27A.

New York Electronic Filing

Disqualifying diagnostic 41916 issues if there is an NY coded Form 1099Misc with only withholding amounts entered.

North Dakota

The Credit for taxes paid calculate when a full year resident is entered on the ND General Worksheet, Residency section, Residency code field (ND1, Box 30).

North Dakota Electronic Filing

A disqualifying diagnostic will issue when the elected farm income on Schedule ND-1FA, Line 2, is greater than the elected farm income on Federal Form Schedule J, Line 2, or if Schedule ND-1FA, Line 2, is equal to zero when the elected farm income on Federal Form Schedule J, Line 2, is greater than zero.

Disqualifying diagnostic 44899 issues if the tax calculated on ND-1NR is not equal to Form ND-1, Line 20, because of overrides entered on Form ND-1, Line 20.

Disqualifying diagnostic 44960 issues when overrides are used on Form ND-1, Line 16, without including Schedule ND-1SA.

Disqualifying diagnostic 47887 allows a joint IRS K-1.

Disqualifying diagnostic 47901 issues for a North Dakota part-year resident or nonresident only.

Disqualifying diagnostic 48196 issues when school district 50-078 is selected on the ND General worksheet, Basic Data section, School District field (ND1, Box 39) .

Informational diagnostic 34948 issues for paper returns and disqualifying diagnostic 47901 issues for e-filed returns when input is missing on the ND General Worksheet, Residency section, Residency code through State code in which you were a part-year resident fields. ND-1, boxes 30-37.

Tennessee Electronic Filing

Disqualifying diagnostic 43182 issues when the return has been selected for electronic filing and no banking information has been entered for direct debit.

Virginia

Virginia return summary, additions/subtractions line will contain Virginia deductions.

When a separate Form 763 is created, a state Form 8960 for taxpayer and spouse is also created.

West Virginia

Form IT-140, Line 25, balance of tax due, calculates use tax from Line 24 less overpayment from Line 23 when use tax is greater than the overpayment on Line 23.

The West Virginia tax equalization calculation worksheet (Form TEC WV), Line 41, Penalty and Interest, now displays override input of \$0.00 entered on Tax Equalization > State Line Adjustments, Options and Overrides > Late payment interest and penalties fields for Taxpayer/Joint and Spouse columns.

West Virginia Electronic Filing

Disqualifying diagnostic 48617 issues when invalid data is entered on West Virginia Other > Certification of Permanent and Total Disability > Physician Address, City, State, ZIP code fields.

Partnership (1065) Product Updates

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Federal

Depletion. The landscape property summary schedules are updated to include only depletion properties entered for the federal return and exclude any entered as state only.

Federal > Special Allocations category > Special Allocations worksheet > Special Allocations Options section > Allocation now displays more than one entry.

Filing Instructions. The custom filing instructions now print both the instructions for Form 8804 and Form 8813 with the return when both forms are produced.

Form 7004. Line 5b check box is no longer checked when the return is not a short year return.

K-1 Multiple Activity Schedule. No longer doubles the entry of Other portfolio deductions input on Partners > Federal / CA Alternative Schedule K-1 Activity Import.

K-1 Multiple Activity Schedule. Now includes information for each partner when more than one activity per partner is entered on Partners > Federal / CA Alternative Schedule K-1 Activity Import .

Schedule K-1 Statements. Disallowed Section 179 for qualified restaurant property and not allowed to be carried over no longer shows instructions in the Schedule K-1 statements.

Schedule K-1. Current Year Increases/Decreases now includes information entered on Worksheet Federal > Partners > Federal/State Schedule K-1 Overrides.

Worksheet Federal > Fiduciary Passthrough > Part I Information About the Estate or Trust now allows city entry and no longer deletes the state entry upon calculation.

Worksheet Federal > Partnership Passthrough and Fiduciary Passthrough credits now delete properly when entries are removed.

California

Form 568 may now be designated as not an initial return even if the return is an initial federal return.

Worksheet California > Nonresident Withholding > Domestic Nonresident Information (Form 592) > Description of other is now included on Form 592-B, Part III, Line H.

Connecticut

The CT K-1T custom filing instructions are updated to remove an unnecessary special instructions paragraph when the CT return is being electronically filed.

Connecticut Electronic Filing

Diagnostics 43257, 43258, and 43259 now issue when invalid input for percentages are present on CT-1065/CT-1120SI, Part IV.

Idaho Electronic Filing

A new diagnostic has been created to ensure the required data is entered when completing the Form 72 detail.

Illinois

IL-1000 and K-1-P reflecting withholding tax payment on partner with negative Illinois income, will no longer calculate a tax payment for this issue.

Indiana

Form IT-65, Schedule K-1, Project number no longer prints with decimals.

The federal attachments now print in the Accountant and Client copies of the return if the option to Print Federal Attachments in all copies is chosen in the return configuration set.

Kansas

Diagnostic 48065 has been added to alert customers if missing or incorrect phone number was entered.

Kentucky

Kentucky

An entry on Worksheet Kentucky > Payments / Penalties > Estimates and Application of Overpayment Nonresident Withholding > Amount of overpayment to apply to estimate is now credited towards the next year's estimated tax on Form 740NP-WH ES.

Worksheet Kentucky > General > Basic Data > Secretary of State organization number is no longer used as the Kentucky Corporation/LLET Account Number. It should be entered on the Kentucky LLET account number field (Box 32).

Kentucky Cities

Filing instructions for Lexington are now prepared when the return is produced from input on Common State > State/City Generation.

Maine

Form 941P-ME, Line B, is updated to include all nonresident partners, not just nonresident individual partners.

Maryland Electronic Filing

A diagnostic is added for returns with a missing PDF path for required PDF attachments on the Federal General category, Electronic Filing worksheet, PDF Attachment - Required section.

Minnesota Electronic Filing

Diagnostic 43322 is now issued to check for first and last names of individual partners.

Missouri

The mailing addresses for Form MO-1040 (composite return) are updated to P.O. Box 3370 for balance due returns and P.O. Box 3222 for refund or no amount due returns.

Missouri - Kansas City

The extension due date for the letters is now April 15 for calendar year returns and the fiscal year end date plus 105 days for fiscal year returns.

Missouri Electronic Filing

A diagnostic is added to prevent returns with negative percentages on Form MO-NRP, Column C, from being exported.

Montana

Interest on underpayment of estimated composite tax will use the current day's date to calculate interest if a date is not entered.

North Dakota

Form 58, Schedule KP, Column 5, and Schedule K-1, Part 4, Line 36, now include royalty deductions from passthrough entities.

Pennsylvania

A modification has been made to ensure the complete foreign address is printing on the forms when a foreign state code is entered on the filer's override address.

A modification has been made to ensure the tax year printed on the RCT-101 is the current tax year when it is a 52/53 week filer.

Utah Electronic Filing

A modification is made to diagnostics to ensure the postal code is entered for partner's foreign addresses as required by the state for electronic filing.

Corporation (1120) Product Updates

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Federal

Form 4797-AMT. The printing of Schedule D-AMT, Form 4797-AMT and Form 6252-AMT are now suppressed, when Form 4626 is not required to be filed in the return.

Electronic Filing

Diagnostic 41212 will now issue to prevent a schema validation error when US is entered as the foreign country code on the Form 5472 consolidated member statement.

Diagnostic 45492 will now issue to prevent a rejection from business rule F3800-157-01 when a 9 digit EIN has been entered but it is not a valid U.S. EIN.

Diagnostic 49184 will now issue when an override of zero is made on the Schedule M-3, Line 5b, to prevent a return for stopping for schema validation error.

Diagnostic 49460 will now issue when mandatory printing of Form 8903 has been selected but there are no amounts on Form 8903. Diagnostic 56300 will now issue to prevent a U.S. address from showing as a foreign address in the electronic file when an invalid character is input for the foreign country on the consolidated member statement.

Reject SC-F5713-001 is resolved when Schedule C for Form 5713 is included in the return.

Alabama Electronic Filing

Disqualifying diagnostic 46514 will now issue when multiple PDF codes are entered on the Electronic Filing worksheet, PDF Attachments - Required section.

Disqualifying diagnostic 46516 will now issue to indicate returns with refundable credits should be paper filed.

Disqualifying diagnostic 48057 will now issue when the apportionment ratio on Form 20C, Schedule E, Line 9, does not equal Lines 7 - Alabama income divided by Line 8 - Adjusted total income.

Arizona

Form AZ 120, Page 2, Schedule A, Line A1, and Schedule B, Line B1, no longer subtracts section 179 depreciation.

The average apportionment ratio on Form AZ120, Page 2, Schedule C, Line C5, rounding issue to six digits has been addressed.

California Electronic Filing

Diagnostic 32082 will no longer issue for a California parent or subsidiary return that includes bank information.

Returns will no longer display a PDF error on the electronic filing status system when longer PDF attachment names are included in the electronic file.

Connecticut

Form CT-1120, Page 2, Line 2, now prints the apportionment fraction for a 100% CT return as 1.000000. This change is requested by the CT DRS to accommodate electronic filing.

Connecticut Electronic Filing

Connecticut returns that are parent or subsidiary returns will be filed as state only returns for electronic filing processing.

Idaho Electronic Filing

Idaho electronic filing will issue a disqualifying diagnostic if Form ID 44, Part I, Column a, Line 1, has an amount with no corresponding Form ID 49 in the return.

Illinois

Schedule NLD, Illinois Net Loss Deduction, will only consider amounts used on Worksheet Income/Deductions > NOL carryover/Carryback > Detail > Year used to determine whether a loss is completely used up.

Schedule NLD, Illinois Net Loss Deduction, will print when discharge of indebtedness is being reported and net operating loss deduction is being used on Schedule NLD, Line 7, Column D. IL-1120, Step 5, Line 36, discharge of indebtedness adjustment, will be limited to the minimum of discharge of indebtedness income and the amount required to bring Line 35, base income or net loss, to 0.

Illinois Combined

Schedule UB, Combined Apportionment for Unitary Business Group, Step 4, Lines 2 and 3, Sales Everywhere and Sales within Illinois, will only use positive amounts, per state specification (sales for apportionment purposes cannot be negative).

Illinois Electronic Filing

Diagnostic 34621 will now issue correctly.

Diagnostic 42979 will now issue only when tax period dates are invalid.

Diagnostic 44038 will now issue correctly for the apportionment factor at the top of the EF Schedule K-1-P.

Diagnostic 46497 has been added to prevent reject L477-5500-2. If Form IL-477, Step 2, Line 16, is zero or negative, then Form IL-477, Step 2, Line 18, must be blank. Diagnostic 46501 has been added to prevent reject L477-500-2. Form IL-477, Step 1, Line 1, Column B, must not be earlier than IL-Header TaxPeriodBeginDate or later than IL-Header TaxPeriodEndDate.

Diagnostic 46503 has been added to prevent reject IL1120-1500-1. If Form IL-1120, Step 1, Line D (New FEIN), contains a federal employer identification number, then IL-1120, Step 1, Line D (date sold), is not present.

Diagnostic 48065 has been added to prevent reject IL1120-7400-3. If the replacement tax has been overridden on IL1120, Line 40.

Diagnostic 48066 has been added to prevent reject IL1120-6600-2. If Form IL-1120, Step 4, Line 27, is greater than zero and Form IL-1120, Step 4, Line 28, and Form IL-1120, Step 4, Line 29, are zero, then Form IL-1120, Step 4, Line 30, must be '1.000000'. Diagnostic 48068 has been added to prevent reject IL1120-6600-5. If Form IL-1120, Step 4, Line 27, is less than or equal to zero and if Form IL-1120, Step 4, Line 28, is

zero, then Form IL-1120, Step 4, Line 30, must equal zero. Diagnostic 48069 has been added to prevent reject IL1120-6100-2. If Form IL-1120, Step 1, Line E (unitary), contains an 'X', then Form IL-1120, Step 4, Line 25, must equal Schedule UB, Step 3, Line 25, Column E.

Returns that contain both a US Zip Code and a Foreign Zip Code will no longer stop for a validation error.

Indiana

The tax rate for estimates for the financial institutions return FIT-20 will now be the 2014 rate of 8% instead of the blended tax rate of 7.75%.

Kentucky

Form 720, Page 2, Line 22, is now limited to Line 21 when contributions are present in the return.

Kentucky Cities

Filing instructions for Lexington are now included when the return is produced from input on Common State > State/City Generation.

Kentucky Consolidated

Form 720, Page 2, Line 18, net income no longer includes Line 15, depreciation adjustment.

The Kentucky Consolidated Adjusted Federal Income worksheet, Line 15, no longer eliminates contributions when there is enough income to allow contributions.

Massachusetts Electronic Filing

Diagnostic 46434 will now issue to prevent a rejection from business rule F355x-078.

Diagnostic 46517 will now issue to prevent a rejection from business rule F355U-355.

Minnesota

Extension voucher Form PV80 will be produced when Minnesota > General > Basic Data > Return type - override indicates M4 return.

Minnesota Electronic Filing

Form M4 will now show foreign information in the corporation address fields. Electronic filing diagnostic 45980 now issues correctly for all missing foreign addresses in the electronic return file.

New Jersey Electronic Filing

A diagnostic is now issued Schedule G FID number is missing or invalid.

New York

Custom filing instructions for Form CT-33M have been updated to removed duplicated entries.

New York City Electronic Filing

Electronic filing diagnostic 43511 will now issue for Form NYC-4S, Schedule C, when the schedule is incomplete.

Electronic filing diagnostics 45878 and 45876 now issue correctly for NYC-4S, Schedule C, when there is missing information.

NYC-3L, Schedule E, basis used check box, will now be included in the electronic file when a government form override is used to mark the box.

Oklahoma Electronic Filing

A diagnostic 48063 has been added to ensure Banking information is not entered at the separate company level when it is part of a combined return. Banking information is only needed at the consolidated level.

Separate company return now can be exported from the consolidated return, when the separate company is marked 'Yes' on Federal Common State, State and City Common Data worksheet, Consolidated/Combined Return Information section, Member of federal consolidated but not for state line.

Oregon Electronic Filing

Diagnostic 43438 will now clear if "In Care Of Name" has been entered on Basic Data worksheet > General section > In care of field or State and City Common Data worksheet > Corporate Records and Contact Information section > In care of, contact, or signor name - override field.

Oregon electronic filing no longer fills the financial transaction with a 0 when banking information has been entered on Basic Data worksheet > Direct Deposit/Electronic Funds Withdrawal section for Oregon has been produced but there is no payment due with the Oregon return.

South Carolina Electronic Filing

Disqualifying diagnostic 47194 will now issue when authorized or issued shares are missing from Form SC1120, Schedule D, Lines 5 and 6.

South Carolina Consolidated

Form SC1120, Schedule M, Part 1. Name and FEIN of common parent can now be entered on the State and City Common Data worksheet, Consolidated/Combined Return information section.

S Corporation (1120S) Product Updates

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Federal

Extension letter has been updated and will no longer show paper paragraphs when option to show electronic filing paragraphs when the return is disqualified is selected.

Electronic Filing

Diagnostic 32361 will now reference attaching Form 2553 as a PDF file.

First Extensions

Diagnostic 56986 will now issue to prevent a batch extension from creating when the taxpayer pin is 00000.

Alabama

Fiscal year dates will now be displayed if an entry has been made for either the beginning or the ending date of the return on the Basic Data worksheet, General section.

Schedule K, Line 9, statement will now properly reference Federal Schedule K, Line 10.

Alabama Electronic Filing

Disqualifying diagnostic will no longer issue to indicate the PDF name is too long.

The Business Privilege Tax return apportionment schedule will now match the apportionment percentage on the Business Privilege Tax return.

Alaska

The text in the extension transmittal letter has been updated to reflect state extension is granted, when Federal Form 7004 is present and there is no input for state extension.

California

Form 540NR Group Nonresident (Composite) tax has been updated to include 1% tax for mental health services for filers over \$1 million income in the "tax due" line of filing instructions and in the default calculation for next year's estimated tax.

Schedule M-1 now reports oil and gas depletion from pass-through entities same as shown on the federal Schedule M-1.

Colorado Electronic Filing

Diagnostics have been enhanced to ensure all necessary data is included when filing Form 1316.

Connecticut

The Apportionment Summary Worksheet now lists the Connecticut Sales apportionment factor as unweighted as it is on Form CT-1065/1120SI.

The electronic file for Form CT-1065/1120SI will now include shareholder's EIN numbers even though they might be invalid.

Georgia

IT-CR, Nonresident Composite Tax Return, Custom Filing Instructions will now include amounts applied to estimates.

Illinois

Schedule M other additions or subtractions will no longer appear in the electronic file if there is no amount or description.

Kansas

Diagnostic 21163 will no longer print when the Annual Report is suppressed.

Kentucky

Statements attached to Form 720S are no longer duplicated in the return.

The extension forms 41A720SL and 740NP-WH-SL no longer lock before the 4/15/14 due date.

Worksheet Federal > Common State > State and City Common Data > General Information > Account/file number is now included on Form PTE-WH, Line 2.

Worksheet Federal > Payments / Penalties > Estimates and Application of Overpayment (Detail) > Installment adjustment, application of overpayment code and amount of overpayment to apply to estimate fields are now included when calculating Form 740NP-WH ES.

Massachusetts Electronic Filing

A schema validation error will no longer occur when the S Corporation address is in the state of South Dakota.

Diagnostic 46508 will now issue to prevent a rejection from business rule FNRCR-013.

Diagnostic 47396 will now issue to prevent a schema validation error when an invalid ownership percentage is entered on Schedule M-1, Part II, Line 2.

Direct debit information will no longer be included with the Massachusetts 355-7004 when only "X to confirm the options selected above" is selected and "X to direct debit any amount due" is not selected.

Schedule ABI will now be included in the electronic file when the 1st entity is blank. All additional valid entities will be included in the electronic file.

Michigan

A new allocation code (24131) has been added for rental real estate income.

Michigan - Flint

Input entered on the Tax Payments worksheet, City Tax Payments section, Prior Year Overpayment field, will now appear on Line 15a of the Flint Corporation Return.

Minnesota Electronic Filing

Form BANK now correctly reflects the amount due from Form M8, Line 19, when there is an additional charge for underpayment penalty included in the return.

Missouri

The mailing addresses for Form MO-1040 (composite return) are updated to P.O. Box 3370 for balance due returns and P.O. Box 3222 for refund or no amount due returns.

Missouri - Kansas City

From 108B, Line 11, supporting statement will now include Foreign Taxes.

New Jersey Electronic Filing

A diagnostic is now issued if the shareholders address on Schedule K is invalid or missing.

The diagnostic for corporate officers "employed date from" now issues when the date is not in the correct format.

New York

Form NYC-3A/ATT has been updated to print Schedule G from data entry on separate company New York City > General > Business Location in and Outside of New York City or NYC-2, Boxes 60 - 103.

New York City Electronic Filing

Electronic filing diagnostic 43544 will now issue for Form NYC-4S, Schedule D, when the stockholder information is invalid.

Electronic filing diagnostic 45772 will now issue for Form NYC-3L, Schedule F, when the stockholder salary information is invalid.

North Carolina

LLC Annual Report will produce Page 2 when the North Carolina > General > Basic Data > Entity type is equal to LLC (NC1, Box 30 = 3).

Oregon

Only credits that can be reported on the Individual Form 40 or Form 40N will now show on the statement for credits on the Oregon Schedule K-1, Line 19. Any credit carryforwards produced from a prior C Corporation status will stay with the S Corporation and will now flow to the shareholder's Schedule K-1. The statement for Schedule K-1, Line 19, will now identify the credit and code that is to be reported on the Individual return.

Oregon Form 20S, Page 1, Line 1a for built-in gains will now pull the amount from the Federal, Schedule D, Part III, Line 18. The program was previously pulling the amount reported on Schedule D, Part III, Line 16.

Oregon Form 20S, Schedule SM, Line 3, will now only be deducted on Oregon minimum tax if the minimum tax was deducted from the Federal 1120s, Line 12.

Oregon Schedule K-1, Line 21, will now be the amount of Oregon income tax reported on Schedule OC1, Column e.

The credit on Form 20S, Page 2, Line 14, will now be limited to the tax on built-in gains. Credit carryforward is only allowed to offset the tax on built-in gains. Credit is not allowed to offset the tax on excess net passive income or minimum tax. A statement will now produce when the amount of credit is greater than the amount of tax on built-in gains.

Oregon Electronic Filing

Diagnostic 47850 will now issue if any amount is entered on Form 20S, Schedule AP-2, Line 8. This state will need to be attached as a PDF when electronically filing the Oregon return.

Oregon electronic filing will no longer fill the financial transaction with a 0 when banking information has been entered on Basic Data worksheet > Direct Deposit/Electronic Funds Withdrawal section for Oregon has been produced but there is no payment due with the Oregon return.

Pennsylvania

The ability to produce Part Year Resident RK1's and NRK1's has been added to Pennsylvanian by making entries in Shareholder Information, State information, Date 1 and Date 2 fields.

South Carolina

Form SC1040, Line 18. Amount paid with extension will now be limited to zero.

Form SC1120S, Schedules A and B. Additions to and Deductions from Federal taxable income will now be displayed properly.

Texas

Calculation on Form 05-178, Line 6, will now be 5%.

Utah Electronic Filing

A Utah disqualifying diagnostic now issues if there is more than one apportionment method entered on Utah Schedule J.

A Utah disqualifying diagnostic now issues if Utah Schedule K, Line 12 (Utah Amount), does not equal the total of the Utah Schedule K-1s, Line 12.

Virginia

Disqualifying diagnostic 46419 will issue when the return is timely filed but the direct debit date entered is after the due date.

Electronic filing disqualifying diagnostic 41339 will issue when a government form override has been entered on Form 502A, Section B, Percentage column for Lines 1, 2a, 2b, or 2c.

Fiduciary (1041) Product Updates

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Federal

8949 detail will now print with grantor letters in K-1 package.

Adjustment to qualified dividends entered on IRS-K1 will now carry to Schedule D AMT, Line 23.

An entry of \$1 for private activity bond dividends will now carry to the Schedule I, Line 8.

If both short term and long term capital gains are distributed and the Schedule B, Line 15 limits the amount of long term capital gains to be distributed, short term capital gains are not distributed.

PAB interest information will no longer print on the grantor letter in the AMT section if it is zero.

Removed duplicate asset listing when the adjustment override is used.

Schedule K-1 will accurately reflect distributions for a simple trust when 100% of accounting income is distributed and Schedule B, Line 14, is greater than Schedule B, Line 15, and capital gains are distributed.

The allowed amount of 8582 passive loss will now be reflected on Schedule E, Page 2, when there is Schedule E investment interest in the return with multiple activities.

Form 8960. Line 10 administrative expenses will now be reduced by the portion of expenses allocated to tax exempt income.

Electronic Filing

Diagnostic 44084 will now issue for Schedule C when applicable.

Diagnostic 44685 now issue when there is an invalid date entered with the totals input.

Diagnostic 44696 will now issue stating that if Schedule E, Line 28A(e) is checked, and Line 28A(h) has a nonzero value, then Form 6198 must be present in the return.

Diagnostic 49060 will now issue if the beginning and ending year dates entered are the same.

Rejection F1116-009-01 will no longer be received for returns with form 1116AMT.

Schema validation errors will no longer be received when consolidated amounts are entered with no descriptions.

Alabama

The calculation for the amount of the federal net investment income tax allowable for a deduction on the Alabama ESBT worksheet for a nonresident Alabama return has been updated to prorate the amount of the deduction based on the amount of Alabama sourced ESBT investment income which was subject to the tax.

Kansas

Fiduciary, KS Schedule CR, Line 4, has been updated to match the information from K-41, Page 1.

Maryland

Line 16b on the MD 504NR will not exclude ESBT income.

Zero is now a valid entry for the state tax refund override.

New Jersey

Partnership income detail will not be included on the K-1 when the option has been selected to report as one amount.

The K-1 will no longer calculate an amount for gain on disposition of property when it is entered as federal only.

New York - Electronic Filing

New York electronic filing will be disqualified if the return is a nonresident or part-year resident return and the IT-205-A has been suppressed from printing.

New York electronic filing will now reflect the preparer's name as the accountant's first line of the business name if a preparer is not entered in the return.

New York electronic filing will now reflect the trust name from the continuation line if the first line of the trust name is blank.

New York electronic filed returns without a trustee title will be disqualified for electronic filing.

Schema errors will no longer occur for the city address.

Texas - Electronic Filing

Diagnostic 48051 will now issue if an improper form is filed.

Wisconsin

Schedule WD will now properly reflect gains/losses from a common trust fund.

The PW-1 letters will not create in the if the form is not present.

Estate & Gift (706/709) Product Updates

Return to [Table of Contents](#).

Federal

The filing address for the taxpayer's Form 709 prints on the custom filing instructions.

Exempt Organization (990) Product Updates

Return to [Table of Contents](#).

Federal

Federal Extension Filing Instructions have been updated and will no longer show paper paragraphs when extension is qualified.

The state transmittal letter has been updated for the accountant prepared paragraph.

Arizona

The Arizona Form 99T transmittal letter now references the correct amount when the return contains an overpayment amount applied that has been reduced by the underpayment penalty.

Pennsylvania

Virginia Form VA500 ADJ, Line 4, now shows taxes entered on the Federal Unrelated Business Tax worksheet, Other deductions section, Line 8, when the state use field is not blank.

Virginia Form 500C underpayment worksheet calculation now uses original estimated tax payment due dates instead of dates that are extended for weekends or holidays.