

CCH Access™ Tax  
2013-4.1 Release Notes

July 20, 2014



**CCH Access™**  
*At the Center of the Firm in Motion*

<b>Contact and Support Information</b>	<b>2</b>
<b>Technology Updates</b>	<b>3</b>
Electronic Filing .....	3
Tax Updates .....	3
<b>Tax Product Updates</b>	<b>4</b>
Individual (1040) Product Updates .....	4
Partnership (1065) Product Updates .....	6
Corporation (1120) Product Updates .....	7
S Corporation (1120S) Product Updates .....	9
Fiduciary (1041) Product Updates .....	11
Estate & Gift (706/709) Product Updates .....	12
Exempt Organization (990) Product Updates .....	13
Employee Benefit Plan (5500) Product Updates .....	14

## Contact and Support Information

---

[Return to Table of Contents.](#)

Product and account information can be accessed by visiting Customer Support online at [Support.CCH.com/Axcess](http://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

---

Return to [Table of Contents](#).

### Electronic Filing

New upload warning - If you upload returns multiple times without release, only the latest upload is available for release. This is because each prior version is replaced by the subsequent upload. If different taxing authorities are present in the various uploads, the result is that returns for any taxing authority not included in the latest upload are not filed. We will now warn you about this in the comments column of the Job Detail Report, which is available in Batch Manager.

### Tax Updates

#### Exempt Organization

New York Form CHAR500, Annual Filing for Charitable Organizations has been revised by the New York State Department of Law. The new version is available on Release 2013.04010 and must be used for all filings due after Tuesday, July 1, 2014.

#### Fiduciary and Individual

The Yonkers resident income tax surcharge increased from 15% to 16.75%. Recalculated estimates use the new rate with this release.

#### Batch Manager

You can now filter and sort return selection for batch roll forward by Fiscal Year End.

#### Return Manager

You can now change the return configuration set of locked returns.

#### Import/Export

TaxTransfer - Unique field IDs are now available for both government form and worksheet fields. You can use the Field Tag feature to view the attributes for these fields and to help you design TaxTransfer imports and exports.

## Tax Product Updates

---

### Individual (1040) Product Updates

Return to [Table of Contents](#).

#### Arizona

AZ 140NR Worksheet for Net Long-Term Capital Gain Subtraction, Line 11, Columns C and D, will only include long-term capital loss carryovers from Arizona sources. Line 2, Columns C and D, will include Arizona sourced Section 1231 gains.

When Arizona is not the home state in the return, Arizona Form 309 name of state line will populate, and Lines 12 and 14 will accept user input.

#### Arkansas

The estimated tax worksheet (Form AR1000ES), Line 4, calculates the maximum tax rate schedule rate when applicable.

The transmittal letter reflects balance due and refund amounts from amended Forms AR1000F or AR1000NR.

#### California Electronic Filing

Disqualifying diagnostic 40001 does not issue when there are foreign wages present with no state ID number.

#### Indiana

For a current tax year's NOL, Form IT-40NOL, Page 1, Line 2, only includes add-backs that are allowed for the current tax year.

Per Indiana Department of Revenue's change of instructions for IT-40NOL, Carryforward Worksheet, Domestic Production Activities deduction is included as an addback on Line 2 when 2013 is the intervening year.

Schedule A, Line 14b, Income or loss from trusts and estates, no longer includes federal depreciation.

#### Kansas

An adjustment for KPERS on the Hypothetical Tax Calculation, Line 2, will not be calculated.

#### Maryland

Form 500DM, Line 5, passive loss adjustment does not include Schedule E rental/royalty entities that do not flow to Form 8582.

Form 502CR, Part H, Line 6, calculates when the spouse column is filled out on Part F.

#### Maryland Electronic Filing

Caution diagnostic 24463 issues if there is input present on the Maryland General worksheet > Maryland Schedule K-1 Information section, but electronic filing is not turned on for Maryland.

## Massachusetts

The Massachusetts state 8960, Line 3, is updated to properly reflect non-qualified plan amounts the same as the federal 8960.

## Minnesota

Form M1PR, Line 14, Homestead credit refund, calculates correctly for homeowners whose household incomes on Line 8 are between \$22,780 and \$27,659, and electronically filed returns are not rejected for when Line 14 does not match table.

Schedule M1M, Line 20, subtraction for federal depreciation addback worksheet calculates correctly regardless of federal NOL input order.

## New York

Returns with only a New York NOL and claiming itemized deductions properly calculate the NOL carryover to next year.

## New York Electronic Filing

Self prepared returns no longer receive NYS reject R0800.

## Philadelphia

BIRT payment coupon produces when BIRT-EZ is used.

## Partnership (1065) Product Updates

Return to [Table of Contents](#).

### Federal

New Jersey composite estimate payments will now carry to NJ 1080-C, Line 20.

The issue with the state gain processor picking up pass through input more than once has been resolved with state pass-through information. Form 500DM will no longer show a difference between Maryland and Federal in this situation.

### District of Columbia

Combined Report Schedule 1 now shows the correct total of estimated tax payments made by the designated agent.

Form D-30 Schedule G rental depreciation is now reduced by personal use days allocation.

### Louisiana Electronic Filing

Electronic file will no longer get rejected when the name control contains numbers or special characters.

### Minnesota

Form KPI, Line 37, check box (indicating Form AWC has been prepared) is now filled only when Form AWC has been requested on Federal Common State - Generic State Schedule K-1 Information/ Generic Partner Input/ State use code 1, and not suppressed on Federal Partners - Partners Information/ Minnesota/ Form AWC withholding options.

### New York

The input for the New York Source Gross Income worksheet has been revised for modifications to Federal Form 1065, Page 1.

### Virginia

Form 502A, Section B, Line 2h, will round the 6th digit after the decimal up when the 7th digit after the decimal is a 5.

## Corporation (1120) Product Updates

Return to [Table of Contents](#).

### Federal

Carryovers - Ohio cities' code field is now added to the Income/Deductions > Contribution Carryover worksheet.

Import of Schedule DB of the Annual Statement has been updated, and additional diagnostics have been added.

### Consolidation

Consolidated - AMT and ACE detail depreciation calculation no longer includes section 179 as depreciation, when an asset claiming section 179 expense at the separate company level without any override entry is present for AMT depreciation and depreciation force option is used at the consolidated level.

### Power Pack

Section 807 reserves can be reclassified between lines 22, 23 and 24 of Schedule M-3 page 3 on Worksheet> Insurance > 1-Trial Balance > "M-3 Ded".

Form 1120-L - An entry to reclassify policyholder dividends on the Trial Balance will no longer adjust unassigned funds.

"Schedule M-3 (Form 1120-L) - Deferred and uncollected premiums" entered in Worksheet > Income/Deductions > Business > Income > Line 15, Schedule M-3 detail now carries to Schedule M-3, Page 2, Line 17.

### Florida

FL F-1120 will correctly display a check to the 'changes have been made to name or address' box when the option for both name change and address change have been selected.

### Indiana

The IT-6 estimate filing instructions have been revised to show pay by mail if the estimate electronic funds transfer requirement is not met. The IT-6 extension filing instructions have been revised to show pay by eft only when the option has been selected.

### Indiana Consolidated

Schedule 8-D, Schedule of Indiana Affiliated Group Members will now print on grid when there are multiple pages.

### Massachusetts Electronic Filing

Massachusetts Form M-8453-C will now display zero on Line 2 when no amounts are present on Form 355SC, Lines 8 thru 10.

## Pennsylvania Electronic Filing

Pennsylvania Electronic filing has been updated to no longer produce both the PA8453-C and the PA8879-C when only the PA8453-C is requested.

## Philadelphia

A modification has been made to the late filing interest calculation to have it calculate at 5% annually as the Federal Short Term Rate is near zero.

## Rhode Island

Banking Institution Excise Tax program has been updated to ensure the taxpayer's complete address prints on the second estimated tax voucher, Form BUS-EST.

Corporation Form RI 74 T, Page 3, is now picking up property codes LOAN and CCR for Schedule G, Lines 1c and 1d items for Apportionment Loans and Credit Card Receivables included in the property factor.

## Virginia Electronic Filing

The system generated PDF of the consolidated worksheet 'Schedule of Combined Adjusted Federal Taxable Income' will be included in the electronic file whenever it is present in the return.



## S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

### Federal

Form 8903 - Amortization from "Totals Only" 4562 form that is attached to "Other" depreciation is no longer included as "COGS Depreciation" on the state QPAI Schedule.

Schedule B-1 can now be suppressed by using the input as stated below. This override feature can be used in conjunction with Form 1120S, Page 2, Schedule B, Question 3. Code "N" must be used on the Basic Data worksheet, Miscellaneous and Schedule B-1 Information section, Line 1.

### Alabama

The transmittal letter and filing instructions for Form BPT-IN now reflects the correct due date for the form.

### Alabama Electronic Filing

Form AL-CAR now prints in the government return copy when the General> Electronic Filing> General> Print full/entire government copy of electronic return option has been selected.

### Arizona

Supporting statement behind AZ 140NR Composite Return now includes all shareholders not participating in the composite filing.

### Indiana

The IT-6WTH will now only include payments for shareholders that have not opted out of the composite return.

### Massachusetts

Massachusetts Schedule S, Line 19, will no longer include Non portfolio Short-Term and Long-Term Capital Gain or Loss from Federal Schedule K, Line 10. These amounts are included on Schedule S, Lines 35, 36 and 39.

### Minnesota

Input is now available on Minnesota Composite / Shareholder Prior Year Section 179 / Bonus Composite Information for the percentages used to apportion prior year add backs of bonus depreciation and section 179 expense.

### Mississippi

If the option is selected, the Paid Preparer Signature will print on the 84-105.

### New York

Form NYC POA1, Section 3, has been updated to print from Other > Power of Attorney > City Code.

New York City Form 4S, Schedule E, Line 5, has been updated to print the number of applicable shareholders entered on Shareholder Information.

## Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

### Federal

Page 1, Box D will no longer double capital gain entries with a basis adjustment in the gross income calculation.

### California Electronic Filing

Added a disqualifying electronic filing diagnostic when change of trustee information is present without a description of the event.

Corrected truncation reflected in the electronic file for applied for FEIN.

### New Jersey

Estimated payments will now reflect the correct mailing address when there is a multi-state return and other states have input to prevent the estimate.

## Estate & Gift (706/709) Product Updates

Return to [Table of Contents](#).

### Connecticut

The following final Connecticut forms are available for dates of death in 2014:

- Form CT-706/709
- Form CT-706/709 EXT
- Form CT-706 NT

## Exempt Organization (990) Product Updates

Return to [Table of Contents](#).

### California

Form 3805Q, Net Operating Loss Computation will now use the 50% limitation for Part III, Line a, Column (e) for losses incurred on or after January 1, 2013 and before January 1, 2014.

### Illinois

Illinois Form AG-990IL Transmittal Letter due date now shows June 30 for a calendar year return instead of on the date.

### Massachusetts

Form PC, Page 3, Line 12, state field will now print from Common State > State/City Common Data > Corporate Records or Contact Information > State - Override when the information is not entered on the state specific worksheets.

Form PC, Page 7, state field will now fill from General > Return Options > Preparer Information > Firm state. The phone number and zip code fields were lengthened to accommodate foreign information.

The form and box number are now correct for the net estimated tax and depreciation adjustment override fields on the Input Override Report.

### Pennsylvania

The nonfileable forms for Pennsylvania have been revised to include the BCO-10 Annual Report Custom filing instructions.

## Employee Benefit Plan (5500) Product Updates

Return to [Table of Contents](#).

### Electronic Filing

Input entered in the return configuration set is visible in blank fields of the Electronic Filing worksheet, electronic Filing section, Electronic Return Originator - Override subsection.

The value that exports in the electronic file for Schedule MB, Line 4d is Yes, No, or blank. The value that exports in the electronic file for Schedule MB, Line 8c is Yes, No, or blank.