CCH Axcess™ Tax

2013-5.0 Release Notes

November 9, 2014

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. 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.

Tax Updates

Issues Addressed

We made numerous changes to:

- Improve calculation and grid performance, application stability, and customer experience on the workstation
- Improve performance of roll forward
- Address diagnostic issues to improve the accuracy of links to worksheets

See *Issues Addressed* on page 18 for more information.

Worksheet Grid Pagination

To improve performance when worksheet grids contain a large number of columns and/or rows, we have added pagination controls to the worksheet grid controls. The pagination controls will only appear when large amounts of data are present.

Return Rebuilder

Return Rebuilder creates a new version of a return to resolve issues with invalid data appearing in an existing return. To rebuild, select the return and click **Rebuild** on the Utilities tab of the Return Manager ribbon.

Organizers

Individual and Fiduciary Organizers are now available for processing.

Return Configuration Sets

Pro Forma/Organizer

The following options have been moved to a combined Pro Forma and Organizer section on the Pro Forma tab:

- Do not alphabetize interest and dividends
- Do not alphabetize charitable contributions

The *Clear signer information return overrides* option has been moved to the combined Pro Forma and Organizer section on the Pro Forma tab. This option now also applies to the Organizer signer information.

Electronic Filing

Desktop Notifications

We have replaced the process of creating batch jobs for uploading returns to the Electronic Filing Status system (EFS) with a desktop notification.

- By default, if there is an exception when uploading the return to EFS, a pop-up will appear on your desktop. You may also elect to receive notifications for successful uploads by changing the option on the Tax > Miscellaneous tab in User Options.
- A new report has been added to EFS group on the Return Manager > Utilities tab to allow you to see the status of all returns uploaded within the last 72 hours.
- Return history and last activity are updated when returns are uploaded to EFS, as well as the success/exception status of the upload.

Upload Returns Wizard

We have added the capability to view and open the auto-generated PDF attachments that are created as part of the electronic filing process.

Note: The following issues will be addressed in a future release:

- **1040 NYC**. There are limited circumstances where auto-generated PDFs may not be listed in the PDF export window. The PDFs are included in the electronic file that is transmitted to NYC.
- **1120S NYC**. The PDF list on the export dialog may be missing certain auto-generated PDFs. The PDF report within the return will display all of the attached PDFs. The PDFs will be present in the electronic file that is transmitted to NYC.

Correspondence Manager

Support of Microsoft Word Quick Parts

We added support in the letter template to add fields and formulas using Microsoft Word Quick Parts functionality. These fields and calculations will be used in the letter generation.

Support of Microsoft Office 365

We now support locally installed 32- and 64-bit versions of Microsoft Office 365.

DataScan

New Keywords

We have added the ability to scan for several client profile keywords, such as Client ID, Client Group, and Responsible Staff Name, as well as the Return Status.

Report Options

You can now include Office and Return Group in your scan results report.

Tax Product Updates

Individual (1040) Product Updates

Return to Table of Contents.

Federal

Form 1040. Line 60 shows the amount from the actual return Form 8960 when equalization is requested and an adjustment is made for TEC Form 8960, line 9b.

Form 1116. Qualified dividends capital gains tax adjustment calculates correctly when the qualified dividend amount is negative.

Form 8858. Schedule M attachment for Form 8865 will now print the filer's identifying number as the Social Security number when the filer is filing the above form with an Individual tax return.

Form 8938. Part IV, Line 3, only counts Forms 5471 that do not have the Pro Forma only option selected.

Tax Equalization. TEC Sch A overrides are recognized when changing the actual Form 1040NR to hypo Form 1040 and the option is selected to use hypothetical state taxes on Sch A, Line 5.

Arkansas

Charitable contribution carryovers calculate without regard to filing status optimization calculations when Schedule AR3 (Itemized deductions) is not present in the return.

Form AR1000NR, Line 10, Interest income, Columns A and B, matches the interest shown on Schedule AR4.

Georgia

The part-year and non-resident retirement exclusion worksheet total line in the earned income section does not print if less than zero.

North Carolina

The extension payment amount is deducted from the late payment penalty calculated on amended returns.

When the direct debit withdrawal date is earlier than the current date, the date used is the current date in the electronic file.

North Dakota

ND-1NR, Line 10, Column B, is always a positive number for student loan interest.

ND-1NR, Line 3, Column B, displays the correct amount of Schedule C income for North Dakota.

The late filling penalty calculates on Form ND-1, Line 36.

Pennsylvania

Form PA-40X, Line 5, calculates when a negative amount is present on the original return and not on the amended return.

South Carolina

Form 8822 correctly prints previous and old addresses.

Partnership (1065) Product Updates

Return to Table of Contents.

Federal

Form 4797-AMT. Automatic sales from Depletion input will now pick up AMT cost.

Form 8865, Schedule K 1, will now complete Lines 14a through 14b when the corresponding 1065 Schedule K 1 has those lines and Form 8865 auto generation feature was used.

Lines 5 through 7, related to pass-through entity, will no longer autofill when pass-through entity input is not present in the return.

Alaska

Footnotes have been corrected when requesting they be attached to form AK 600.

Illinois

Form IL-1065, Page 1, Step 1, Line P, will complete when Schedule 80/20 is attached but all amounts are exempt.

Louisiana Electronic Filing

Diagnostic 47990 will now issue if only special characters are entered for the first and/or last name on the K-1 for partners that are on the Louisiana Schedule of Included Partner's Share of Income and Tax.

When a foreign country code is selected that is not accepted for electronic filing, the foreign country code will change to "OC" to be consistent with the federal return.

Maryland

The presentation of foreign addresses loaded to Form 510, Page 2, Additional Information, Lines 1 and 2 from Maryland General, Basic Data has been corrected. Also, for electronic filing the country code will be transmitted instead of the first 2 letters of the country name.

Maryland Electronic Filing

The percentages for Form 510, Lines 5 and/or 10, will be loaded to the electronic file as 0.0000 if an override of zero is entered on Maryland Income/Deductions, Other Adjustments and Overrides, Percentage of ownership by nonresident individual partners and/or Percentage of ownership by nonresident entities, or the number of nonresident partners on Form 510, Lines 1b and/or 1c, is greater than zero and the computed ownership percentage is zero percent.

Minnesota Electronic Filing

Diagnostic 44582 will now issue when the preparer email address is missing the “@” sign and at least one dot symbol.

New Hampshire

Form BET-80-WE, Business Enterprise Tax Apportionment for Individual Nexus Members of a Combined Group, Lines 17(a), 24(a) and 29(a), have been updated to calculate the Total Dividend Apportionment, Compensation and Wages Apportionment, and Interest Apportionment.

Form BET-80, Business Enterprise Tax Apportionment, Lines 1 and 2, compensation and Wages Paid or Accrued for New Hampshire and Everywhere, has been updated to include 'Compensation of Officers' when New Hampshire Income/Deductions worksheet, Distributive Share Deductions section, Dollar value of services performed by the partners (NH5, Box 90, Dollar value of services performed by the partners during the taxable period - All Partners) is also being used.

New Mexico

The nonresident K-1 will now consistently pick up the ST-2 override for in-state ordinary income.

South Carolina

Input removed from worksheet South Carolina > Credits will no longer remain on the Schedule K-1, Line 16.

Wisconsin

Wisconsin credits on Lines 15a through 15n of Schedule 3K-1 will always be distributed based solely on ownership percentage or special allocation, regardless of the partner's residency status. For nonresident or part year residents, Column e (amount under Wisconsin law) of these lines will equal Column d (Wisconsin source amount) of the same line.

Wisconsin Electronic Filing

Form 4A-1, total apportionment percentage will be included in the electronic file when Wisconsin apportionment input forms are used and the total apportionment percentage is zero.

Corporation (1120) Product Updates

Return to Table of Contents.

Federal

Form 6198. Other income/expenses (adjustment) on Worksheet > Income/Deductions > Passive/At-Risk Activity > 4-At-Risk Limitations now adjusts Line 1 of Form 6198.

Schedule M-3. The income (loss) per tax return from passthrough entities on Schedule M-3, Part II, is now adjusted by the disallowed PTP amounts for Section 1231, short-term and long-term capital losses.

The diagnostic that is produced when the depreciation lock option is selected will now print as a "Caution" diagnostic. Previously, it printed as an "Informational" diagnostic. The depreciation lock option is located at General > Depr and Depl Options and O/R > Depreciation Options and Overrides > Lock depreciation option (Line 18).

The transmittal letters for Form 1120-C will now correctly indicate that the return is due on the 15th month following the end of the tax year, when section 6972(d) is indicated on Other returns > 1120C > Cooperative tax exempt.

Part I of Form 6198 (AMT/ACE versions) now reports income and deductions from the applicable entity.

Form 8858 Schedule M will now generate, when applicable, regardless of your settings.

The amended federal letter and instructions will now turn off when the federal amended return is removed.

Power Pack

Form 1120-PC. Reference to the "accrual of discount" is now removed from the supporting statement for Schedule I "Other Information" Line 10 of Form 1120-PC.

California

Enhanced Sec. 382 NOL processing. When the Sec 382 carryover limit exceeds the current year tax liability, the program will automatically limit the Sec 382 NOL allowed to the tax liability. You no longer have to limit it manually. This applies to regular Sec 382 NOL's and AMT Sec 382 NOL's at the separate company level and the combined level.

The program will now properly account for Sec 179 and Sec 280F recapture.

California Combined

In certain limited cases, the CA program was printing a blank Officers Compensation statement at the combined level. The blank statement no longer prints.

Georgia Electronic Filing

The electronic file will now be disqualified if the PDF name is used twice.

Illinois

Form IL-1120, Page 1, Step 1, Line L, Schedule 80/20 is attached will complete when Schedule 80/02 is attached but all amounts are exempt.

Illinois now includes a copy of the Federal Form 1120 when the return is using any of the alternative Federal Form 1120 forms.

Schedule UB, Combined Apportionment for Unitary Business Group, Step 2, Line 27, no longer includes Federal Form 1120-PC, Page 3, Line 17.

Schedule UB, Combined Apportionment for Unitary Business Group, Step 2, Line 30, now equals Line 28 less Line 29c.

Schedule UB/NLD, Unitary Illinois Net Loss Deduction, Column E, Line 13, is now Line 11 multiplied by Line 12.

Indiana

Form IT-20, Line 23, tax calculation and supporting statement have been revised to correct the tax calculation for fiscal year returns ending 6/30/14.

IT-20 Page 1, question S, now is checked No when question T is checked Yes.

Kansas

Form 121, Page 2, will now print in both the accountant and preparer copies.

Form K-121 will no longer print additional copies of statements with continuation information pages.

Kansas Combined

Form K-121, line 20 NOL deduction has been revised to equal line 19 Kansas net income, when the amount of NOL is sufficient to negate the line 19 amount.

Kansas Electronic Filing

In the KS Combined Return, Form K-120EX, Part B, when Column (a) for the period and Column (b) for the method are zero, diagnostic 44829 will issue to prevent a schema validation error.

Louisiana Electronic Filing

Louisiana diagnostic 46530 will now issue if a zero is entered for the adjustment amount without a corresponding description on the Federal Income Tax Deduction Worksheet.

Maryland

Form 500X, Line 8, Columns A and C, will no longer show negative amounts.

Maryland Electronic Filing

Form 500X can now be transmitted when apportionment is present in the return.

Minnesota Electronic Filing

On Form Schedule AFF, when there is a foreign address that is incomplete, diagnostic 47486 will issue to prevent schema validation errors.

Mississippi

Form 83-310 has been corrected for subsidiary returns to allow losses to be included in the calculations. Previously, only gains were allowed and losses were limited to zero.

Form 83-155 will print if the box on Form 83-155 is checked to elect to forego carryback and carryforward the current year NOL.

New Hampshire

Form DP-132, Net Operating Loss (NOL) Deduction has been updated to allow a maximum amount that can be used from $1,000,000 to $10,000,000 for a taxable period ending after Jan. 1st, 2013.

New Jersey

The following form and schedules are available on this release. Be advised these have not been approved by the State of New Jersey and all forms contain the "Approval Pending" watermark. We are making the following available:

- 2013 New Jersey Corporation Form CBT-100
- Associated schedules for corporations with 2013 fiscal years ending after June 30, 2014

New Jersey requires all forms be approved by the State of New Jersey's Division of Taxation prior to release for filing. These forms should not be filed under any circumstances.

New York City

Form NYC-3A, Page 2, Line 2, "Total Assets," will now match the adjusted combined amount shown on Form NYC-3A, Page 6, Schedule E, Line 1, Column E.

In limited circumstances, Form NYC 3A/ATT was not being generated. This has been corrected.

South Carolina

Form SC1120. The audit contact information will now show on the parent's and subsidiaries' copy of Form SC1120 when filing consolidated returns.

South Carolina Electronic Filing

Schedule M. The apportionment percentage will now default to 100% if the apportionment percentage is greater than 100%.

S Corporation (1120S) Product Updates

Return to Table of Contents.

Federal

Form 8949 for wash sales on Form 8949, Column f, has been updated to avoid doubling when more than one code is entered.

The deductions allocatable to oil and gas at the shareholder level have been updated to ensure that any other expense amounts entered at the well level are included.

The diagnostic that is produced when the depreciation lock option is selected will now print as a "Caution" diagnostic. Previously, it printed as an "Informational" diagnostic. The depreciation lock option is located at General > Depr and Depl Options and O/R > Depreciation Options and Overrides > Lock depreciation option (Line 18).

California

CA Shareholder Basis Worksheet. The shareholder ID number is now being masked on CA shareholder basis worksheet Pages 1 and 2.

Consolidated

Inter-company interest income from tax affiliated group print fields reported on the Combined Attachment to Schedule M-3 (per Tax Return) has been updated.

Iowa

Form 1120C preparer's ID number has been updated to use PTIN entered in the return configuration set.

Maryland

The letters will show an extension period of six months for Form 510C instead of seven months.

New Hampshire

The Combined Form BET, Business Enterprise Tax, Total Gross Receipts line has been updated to include separate company and non-consolidated member amounts from Partnership. S Corporation, Fiduciary, and Individual.

The Corporation, S Corporation, and Partnership Combined Reconciliation, NH-1120-WE worksheet has been updated to include all systems' reconciliation information in the detail to match the Combined total amounts.

New Jersey

The following form and schedules are available on this release. Be advised these have not been approved by the State of New Jersey and all forms contain the "Approval Pending" watermark. We are making the following available:

- 2013 S Corporation Form 100-S
- Associated schedules for corporations with 2013 fiscal years ending after June 30, 2014

New Jersey requires all forms be approved by the State of New Jersey's Division of Taxation prior to release for filing. These forms should not be filed under any circumstances.

New York

Form NYC-3A, Page 2, Line 2, "Total Assets," will now match the adjusted combined amount shown on Form NYC-3A, Page 6, Schedule E, Line 1, Column E. The program has been modified to avoid duplication of officer information on the combined level for New York City.

Forms NY POA and NYC POA have been modified to incorporate preparer information based on the preparer code.

Filing instructions for MTA amended returns have been modified to present a correct balance due/refund.

Oklahoma

The Form 200 Balance sheet, Columns A and B amounts will clear when the End of taxable year amounts for the assets entered under the SchL/M tab > Balance sheet worksheet are deleted.

The gain from the disposition of assets with Section 179 will flow to the Form 512-S, Page 2, Part 3, Line 10, and this amount will include the Section 179 recapture.

Oklahoma Electronic Filing

Form 512-S, Page 3, Part 5, Line 14, Nonresident share of income to tax, will be blank when the income to tax amount is zero.

Rhode Island

Amounts already paid on estimate Federal Payment and Penalties category, Estimates and application of Overpayment worksheet, 3 - State Estimates and application of Overpayment section, detail view, Amount paid toward next year estimate field, will now reduce the voucher amount due for successive quarters until exhausted.

Alternate Filing Instructions for the Rhode Island for RI-1096PT now includes both Interest and Penalty separately shown as an addition to the Balance Due.

Form RI-1040C-ES is now produced when a mandatory estimate is requested and the total amount of payments for the vouchers falls below the $250 protective estimate level.

The RI 1096PT, Page 2, is now produced for zero income returns when there are nonresident shareholders.

Fiduciary (1041) Product Updates

Return to Table of Contents.

Federal

2013 to 2014 roll forward will include information for Consolidated 1099 entries if there is no interest involved and only dividends, stock, or miscellaneous income exists, unless the delete from pro forma box is selected.

ESBT at risk loss carryovers will roll forward when there are two O-6 forms in the return.

Return options will take precedence over the return configuration set for Line 3 of questions on Form 1041, Page 2.

The ESBT net income will no longer appear on the Schedule K-1, Line 14H, as an adjustment to net investment income.

When a final year return has zeros entered for capital gain distributions, the AMT portion will no longer show as being distributed.

When the entity type of the return is changed, the qualified dividends white paper statement should clear upon recalculation of return.

Estate & Gift (706/709) Product Updates

Return to Table of Contents.

Federal

The following final forms with an August 2013 version date are available for dates of death in 2014:

- Form 706
- Schedule A
- Schedule A-1
- Schedule B
- Schedule C
- Schedule D
- Schedule E
- Schedule F
- Schedule G/H
- Schedule I
- Schedule J
- Schedule K
- Schedule L
- Schedule M
- Schedule O
- Schedule P/Q
- Schedule R
- Schedule R-1
- Schedule U
- Schedule PC

New York

Form ET-706 (3/14 version date) is available for dates of death in January through March 2014.

Exempt Organization (990) Product Updates

Return to Table of Contents.

Federal

The California Form 199 Electronic Filing Instructions, payment information paragraph will include the payment due date when the due date has been entered on the Federal Worksheet > Letters and Filing Instructions > Filing Instructions> Line 12.

A foreign country code of "PO" for Portugal will now be treated as a valid code on Form 990-PF, Page 11.

The lead paragraph for the Federal transmittal letter has been updated to use the correct keywords for the year references.

Florida

The FL-1120 custom filing instructions have been updated and will show the correct due date.

Employee Benefit Plan (5500) Product Updates

Return to Table of Contents.

Federal

Roll forward includes up to 3 lines of input for Schedule A >Benefit Contracts > Nature of costs.

Issues Addressed

Return to Table of Contents.

Issues for the following CCH Axcess Tax modules were resolved and are included in release 2013-5.0.

Correspondence

All edited paragraphs are successfully saved in Partnership returns. (97905)

Pennies are included in the Filing Instructions letter for all Texas Franchise returns. (98282)

Opening custom letter templates no longer causes a file corruption error. (99490)

Paragraphs correctly repeat when used in user-defined custom letter templates. (100246)

Uploading letterhead files no longer causes the system to close unexpectedly. (100517)

Opening Correspondence Manager no longer causes the system to close unexpectedly. (102693)

Editing letters in a 2013 Partnership return with a partner name that contains special characters no longer causes an error. (102777)

Closing a letter that has not fully uploaded no longer causes the system to close unexpectedly. (102814)

Editing transmittal letters no longer causes the system to be unresponsive. (103615)

Electronic Filing

Preferences are successfully saved on the Electronic Filing Status system site. (98337)

The "An item with the same key has already been added" error no longer occurs when exporting a consolidated Corporation return to the Electronic Filing Status system. (103119)

Print

Depreciate forms using small font print correctly in a landscape orientation. (93591)

CA 1067A prints the full list of shareholders. (96233)

When the default print set is updated for an organizational unit, that print set is correctly applied to applicable existing returns. (98589)

Tick marks correctly display in printed returns. (98812)

All content in the Combined Income and Deductions statement for Oregon consolidated returns correctly prints within the page. (99487)

Printing Fiduciary returns set as Grantor Trust no longer causes a "Print Preparation Failed" error. (100017)

The system no longer closes when printing the 4562 - Schedule E Depreciation Small Font Detail report. (100197)

Forms without data no longer print when using specific print sets. (100905)

The Statement reference text prints on the correct line. (101231)

Form 4562 - Other Depreciation Portrait Detail no longer includes blank pages when printing to PDF. (102717)

Form 8949 no longer includes blank pages when printing to PDF. (103608)

Tax

The system checks if the DCS service is running when opening a return and attempts to start the service if it is not running. (68450)

An "RASProxyServiceFault" error no longer occurs when rolling forward large Partnership returns. (93099)

Rolling forward large returns no longer causes the system to be unresponsive. (93101)

The 1040 - Simplified Business Use of Home form correctly generates in all returns. (96504)

Opening an input form no longer causes the system to close unexpectedly. (100522)

Schedule K-1 footnote spacing correctly starts on the next page, when applicable. (100749)

Navigating between forms when multiple returns are open no longer causes the system to close unexpectedly. (102075)

Uploading consolidated Corporation returns no longer causes an "Object reference not set to an instance of an object" error. (102531)

A 1040 Publicly Traded Partnership Activity attaches to the correct PTP activity. (10266)

Passthrough activities can be successfully deleted in Partnership returns. (103863)

Upcoming Releases

Return to Table of Contents.

Look for the following updates in a future release:

Individual (1040) Product Updates

Electronic Filing

Form 4868 qualifying for the foreign due date can be exported when a 1040NR return is present and the current date is past 4/15.

Corporation (1120) Product Updates

Federal

Line 10 of Schedule J (Form 1118) amount subject to recapture for each category is now limited to 50% of U.S income as shown on line 6 (iv).

Arizona

Form AZ-300 has been updated so that Line 34 reflects the proper amount of research credit flowing from AZ 308.

S Corporation (1120S) Product Updates

California

Proper book/tax state tax adjustment is now made on Form 100S, Page 5, Schedule M-1, when federal Schedule M-3 is prepared with Federal Form 1120S and an entry is made for book amount of state taxes for automatic Schedule M-1/M-3 adjustments.

Fiduciary (1041) Product Updates

New Jersey

4797 amounts will no longer be included on both Lines 9 and 11 on NJ-1041, Page 1.