

CCH Access™ Tax
2013-5.4 Release Notes

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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 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.

Highlights for Release 2013-5.4

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Individual and Fiduciary Roll Forward

The IRS changed requirements for 2014 Form 8960, Line 7, Deduction Recoveries worksheet, when final instructions were issued. This will impact the roll forward of Individual and Fiduciary returns where 2013 Form 8960, Line 11 exceeds Line 8. Do one of the following:

- Roll forward should be rerun to update the number for affected returns.
- Changes can be made manually in the 2014 software on Taxes > Net Investment Income Tax > Net Investment Income in Year of Deduction.

Tax Product Updates

Individual (1040) Product Updates

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Federal

Roll forward. The Income/Deductions > Net Investment Income Tax > General, Prior Year Federal and State Information > *Net investment income in the year of deduction* value will roll forward the 2013 Form 8960, Line 8 minus Line 11 instead of Line 12.

Wisconsin (2014)

Prior-year Wisconsin assets that do not use Depreciation and Amortization (Form 4562) State Column input and that have accumulated depreciation amounts roll forward the correct basis for purposes of the Wisconsin Basis Adjustment calculation. These basis amounts appear on the Wisconsin Income/Deductions > Addition/Subtraction > Depreciation Adjustment Detail worksheet.

Do one of the following:

- Roll forward should be rerun to update these amounts for affected returns.
- Changes can be made manually in the 2014 software on Wisconsin > Income/Deductions > Addition/Subtraction Depreciation Adjustment Detail.

Partnership (1065) Product Updates

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Federal

Roll forward. Federal > General > Electronic Filing, Taxpayer self-selected PIN, signing officer's name and title of signing officer fields now roll forward when the return configuration set Pro Forma > Clear all electronic filing return overrides option is selected.

Estate & Gift (706/709) Product Updates

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New York

The following final New York forms are available for dates of death on or after April 1, 2014:

- Form ET-130
- Form ET-133