

CCH Access™ Tax
2014-2.3 Release Notes

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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 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 Year 2014 Release Notes

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CCH Axxess Tax Release Notes inform you of the enhancements and updates that have been made to Tax products and systems with the current release.

The updates provided in the Release Notes include the following:

- Contact and Support information
- Updates to Tax technology (electronic filing updates, Organizer, roll forward, technology enhancements)
- Updates made to Tax products (form additions and updates, changes in diagnostics, changes caused by regulatory updates)

Previous Releases

[CCH Axxess Tax 2014-1.0 Release Notes](#)

[CCH Axxess Tax 2014-2.0 Release Notes](#)

Highlights for Release 2014-2.3

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2014 Tax Updates

Tax Increase Prevention Act (TIPA) Update

The IRS continues to release forms affected by TIPA, commonly known as *Tax Extenders*, and we have updated our tax programs accordingly. All Tax Extender forms have been updated by the IRS to reflect the revised text that replaces the *Reserved* caption used on earlier releases.

As of this release, the following is our status of all Tax Extender forms:

- **IRS final and released by CCH Access Tax on release 2014-2.3**
 - ◆ Form 8864
 - ◆ Form 8900
 - ◆ Form 8909
- **IRS final and CCH Access Tax work in process with projected release on 2014-2.4, available on Sunday, February 1, 2015**
 - ◆ Form 1040 Schedule A
 - ◆ Form 6478
 - ◆ Form 6765
 - ◆ Form 8835
 - ◆ Form 8844
 - ◆ Form 8845
 - ◆ Form 8908

Maine Conformity/Nonconformity with the Tax Increase Prevention Act of 2014

Based on recent communication from Maine Revenue Services, indicating that conformity is planned, CCH Access Tax has been updated to conform with recent changes to Maine tax forms for paper and electronic filing. For more information on Maine conformity to the Tax Increase Prevention Act of 2014, see Volume 25, Issue 1 of the Maine Tax Alert at http://www.maine.gov/revenue/publications/alerts/2015/ta_jan15_vol25_iss1.html.

The list of affected Maine tax forms includes the Maine Capital Investment Credit Worksheet and the following forms:

- **Individual Income Tax**
 - ◆ Form 1040ME, Schedule 1, Lines 1e and 1f, and related instructions
 - ◆ Form 1040ME, Schedule A, Line 12, and related instructions
- **Fiduciary Income Tax**
 - ◆ Form 1041ME, Schedule 1, Lines 1e and 1f, and related instructions
 - ◆ Form 1041ME, Schedule A, Line 8, and related instructions

■ Corporate Income Tax

- ◆ Form 1120ME, Lines 4e and 4f, and related instructions
- ◆ Form 1120X-ME, Lines 4e and 4f, and related instructions
- ◆ Minimum Tax Worksheet for Schedule B

We will continue to monitor the Maine legislation and communicate further changes, if needed.

Roll Forward

We have resolved the issue with restricted access customers not being able to roll forward returns.

Large Return Print

We have resolved an issue with the printing of large returns.

Electronic Filing

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

Individual

Federal FBAR	New York Extension	Oklahoma
Louisiana	New York City	Oregon
Maine	New York City Extension	
New Hampshire	North Carolina Extension	

Partnership

Federal FBAR	Massachusetts Extension	New Hampshire
Connecticut	Maine	North Dakota
Massachusetts	Michigan MBT	Wisconsin

Corporation

Federal FBAR	Massachusetts Extension	North Dakota
Florida	Maine	Wisconsin
Florida Extension	Michigan MBT	
Massachusetts	New York Extension	

S Corporation

Federal FBAR	Massachusetts Extension	New York Extension
Connecticut	Maine	North Dakota
Florida	Michigan MBT	Wisconsin
Florida Extension	Montana	
Massachusetts	New Jersey	

Fiduciary

Federal FBAR
Arkansas
Colorado

Georgia
Minnesota
New York

New York Extension

Exempt Organization

Federal
Federal Extension

California
New York

Virginia

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 3115. If automatic change code 997 is entered on Form 3115, the filing instructions are updated to include Washington, D.C., in addition to Ogden, Utah.

State Transmittal Letter Customization. The paragraph instructing taxpayers to return state signature forms now allows for customization. In order for customization to flow properly, the Transmittal Letter > State Filing Instructions > Electronic Filing > paragraph 18, "[Return {StEForm} to {Us} {StEfrmDt}.]", must be reset and customized again.

The default values are loaded for the tax-exempt code on Interest (Schedule B) (Detail) > Tax Exempt Interest > Code and on Dividends (Schedule B) (Detail) > Tax Exempt Interest > Code when both tax-exempt interest and private activity bond interest have been entered on Interest (Schedule B) (Detail) > IRS 1099-INT > Tax-exempt interest and Specified private activity bond interest or on Dividends (Schedule B) (Detail) > IRS 1099-DIV > Exempt-interest dividends and Specified private activity bond interest dividends.

Kansas

For tax year 2014, the Kansas Department of Revenue requires the amounts on Schedule S, Part A, Lines A6 and A24, to match the amount on Form 1040, Line 17, instead of reporting entities with losses on Line A6 and reporting entities with income on Line A24. We have removed the statements detailing the entities and their amounts since the amounts on Schedule S, Part A, Lines A6 and A24, will match the total amount reported on Form 1040, Line 17.

The disqualifying diagnostic text matches the diagnostic heading for Kansas and does not produce an error when printing the tax return.

Partnership (1065) Product Updates

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Federal

Form 3115. If automatic change code 997 is entered on Form 3115, the filing instructions are updated to include Washington, D.C., in addition to Ogden, Utah.

Schedule K-1. Government form overrides and tick marks no longer deactivate upon recalculation of the return.

The link from Form 1065 to the Master Tax Guide is updated.

Electronic Filing

The processing of extensions with federal only PDF attachments is no longer stopped due to a PDF attachment error.

New York

The New York preparer exclusion code from the staff profile is now included in the return when using a preparer code in the return.

Corporation (1120) Product Updates

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Federal

Form 3115. If automatic change code 997 is entered on Form 3115, the filing instructions are updated to include Washington, D.C., in addition to Ogden, Utah.

S Corporation (1120S) Product Updates

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Federal

Form 3115. If automatic change code 997 is entered on Form 3115, the filing instructions are updated to include Washington, D.C., in addition to Ogden, Utah.

California

Schedules K and K-1, Line 16b, other tax exempt income, now includes nontaxable refunds of nondeductible taxes previously paid or accrued. The refund will also carry to Form 100S, Page 5, Schedule M-3, Line 3, Other additions, in the Other adjustments account column.

New Jersey

Filing instructions produced with Form NJ-630-V, composite extension payment voucher, have been clarified.

Fiduciary (1041) Product Updates

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Federal

The preparer's name correctly prints on Form 1041.