

CCH Access™ Tax
2014-2.5 Release Notes

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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 Access 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)

Highlights for Release 2014-2.5

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Electronic Filing

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

- Individual
 - ◆ Delaware
 - ◆ Illinois
- Partnership
 - ◆ New York
 - ◆ Rhode Island
- Corporation
 - ◆ Louisiana
 - ◆ Missouri
 - ◆ Rhode Island
- S Corporation
 - ◆ Louisiana
 - ◆ Missouri
 - ◆ Rhode Island
- Fiduciary
 - ◆ Maine
 - ◆ Missouri
 - ◆ Montana

Tax Product Updates

Individual (1040) Product Updates

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Federal

2 Year Comparison. The 2013 Disallowed due to AGI limit on the 2 Year Comparison worksheet will present as a negative number.

Form 1040. Form 8863, Line 19, carries to Form 1040 when the only tax is from excess advance premium tax credit repayment.

Form 114. This form is included in the return when the only entries are to override the number of accounts on Foreign Assets (Form 114 and 8938) > Form 114 Print, Number of Accounts and Amended Information.

Form 8965. An entry for dependent's modified adjusted gross income is added to household income.

Return Summary. Form 8962 and Form 8965 are included.

Schedules C, E, and F. Employee benefits are reduced by the full amount of credit from Form 8941 when the credit has been tied to one of these entities.

Colorado

Form 104CR, Line 34, carries over any unused child care contribution credit to 2015.

Georgia

Form 525-TV prints when Form 500X results in a balance due.

Michigan - Michigan Cities

Detroit nonresident return only picks up wages coded to Detroit.

Partnership (1065) Product Updates

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Federal

Batch First Extensions. The scanlines and postnet barcodes for Ohio IT 1140P and IT 4708P have been corrected. An additional copy of Federal Form 7004 is now printed for the Ohio composite return.

Form 2848, Line 7 - Signature of Taxpayer. The taxpayer name now prints on the 'Print Name' line.

Form 3115. New Automatic Change Request Code 183 has been added to diagnostic 25359.

Form 3115. When Change in Accounting Method Requests Made Within the Past Five Years data is present and deleted using the delete key and not delete this record, there will no longer be a supporting statement of the prior change in accounting methods present.

Schedule K-1. Line 13W now includes all applicable "Other Deductions" included on Form 1065, Schedule K, Line 13d.

Schedule K-1. Line 9c is now recalculated when section 1250 input is removed from the return.

Schedule K-1. The current year increase/decrease statement is updated to prevent erroneous references to disallowed section 179 expense.

Alabama Electronic Filing

Form AL8453-PTE now prints at export when electronically filing the PTE-C composite form by itself.

California

Form 3522 amount now includes the amount of overpayment to be credited to next year's tax entered on Worksheet California > Payments / Penalties > Estimates and Application of Overpayment > Amount of overpayment to apply to estimate.

Form 3522 (prior year) letter and filing instructions are now prepared.

Colorado

A modification was made to the check box for attaching a statement disclosing a reportable transaction, as it was being automatically checked when a PDF was attached to the return.

Connecticut

CT-1065/1120SI. Apportionment Schedule on Page 3 will be blank when the input on Connecticut Allocation and Apportionment worksheet > Apportionment factor Overrides > Leave CT-1065/1120SI, Part II blank is checked.

Diagnostic 33347 will not issue when the letters and filing instructions are informing taxpayers to make payments on the Connecticut's Web site.

Indiana

The K-1 footnotes will now appear when entered on worksheet Partners > K-1 footnotes section.

Massachusetts

Massachusetts Schedule 3K-1, Line 25, for corporate members will no longer double the partner's share of rental real estate other adjustments reported on Massachusetts Income/Deductions worksheet > Other Adjustments to Federal Ordinary Income section > Other Adjustments to Rental Real Estate Income fields.

Massachusetts Schedule 3K-1, Line 6, will now special allocate other adjustments for rental real estate activities entered on Massachusetts Income/Deductions worksheet > Other Adjustments to Federal Ordinary Income section > Other Adjustments to Rental Real Estate Income fields when the partner number or ratio ID is entered.

Michigan - Grand Rapids

Michigan Cities Common Form. The standard filing instructions now lists all estimate installments when the request to make the first estimate equal to the total estimate has been checked on the Michigan Cities > Estimates and Application of Overpayment worksheet.

North Dakota Electronic Filing

Returns must be recalculated and resubmitted if rejected and Form 58, Page 1, Line 1, does not contain a value.

Oregon

Form P-2014. The override on worksheet Oregon > Multnomah/Portland > Section 3 Income/Deductions > Line 4 Compensation allowance deduction will now adjust Line 6M.

Tennessee

Returns must be recalculated and resubmitted that are impacted by Reject STATE-005.

Virginia

Form 8879P, Part II, now includes the date entered on Federal > General > Electronic Filing > Electronic Signature Information > Date signed by taxpayer.

Corporation (1120) Product Updates

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Georgia

Form 600 Preparer firm name and preparer signature now print correctly.

Hawaii Consolidated

Form N-304 no longer includes elimination companies within the list of subsidiary corporations.

Indiana

Net Operating Loss Carryover on the General Carryover Report will now include current year loss from IT-20, Page 1, Line 21, plus the cumulative loss from IT-20NOL.

New York

Form CT-639 has been modified to reflect overflow information that was truncating several characters.

New York Electronic Filing

Form TR-579-CT, Line 1, no longer includes the amount from the return when estimates only are selected for direct debit.

Tennessee

Form 174, Schedule F, Line 6, will now equal the sum of all Line 5 input on Schedule F.

Wisconsin

Form 4, Page 3, Line 51, now shows the location of Wisconsin operations.

S Corporation (1120S) Product Updates

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Federal

Form 8936 worksheet is updated so that the information entered there can be displayed on Form 8936.

Schedule B-1, Columns A and B, for shareholder information on record, can now be overridden using input on the Schedule B-1 worksheet.

Schedule M-3 - Book / tax adjustments from Schedule M-3 are not carried to Schedule M-1 when the option to suppress carrying M-3 adjustments is used and there are no entries for Schedule M-1.

The book accumulated depreciation for an automatic sale excludes the section 179 exclusion.

Indiana Electronic Filing

IT-8879S will now display the S Corporation's address from the Basic Data worksheet > General section.

Minnesota

For purposes of Form M8A, in calculating the Worksheet for Minnesota S Corporation Taxes, in the absence of any apportionment data, Minnesota apportionment will be assumed to be 100%.

Minnesota Electronic Filing

Diagnostic 43327 will not issue when the return has a valid 52/53 week taxable year (the fiscal year end date is not greater than the fiscal year begin date plus 373 days, per MN DOR specification).

Diagnostic 45529 will issue when Form M8, Line 4, is not equal to the sum of all Schedule KS, Line 35.

North Carolina

Form NC 478I, Page 2, Part 5, Line 7, amount may be incorrect in some returns. However, the correct amount has been reported on Page 1 in the scanband for the Line 7, Page 2 Part 5, Line 7, amount.

Oklahoma

The Oklahoma Shareholders' Schedule K-1s will now be included in the K-1 package.

Pennsylvania

The extended due date for the RCT-101 has been updated to use months instead of days, producing a due date typically on the 15th of the month due.

Vermont

Form BI-471 will be prepared when there is bonus depreciation adjustment on Line C.

Fiduciary (1041) Product Updates

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Federal

Maximum qualified disability exemption on Form 1041 has been updated to \$3,950.

Form 8960

Net investment income tax will no longer calculate when a grantor charitable lead trust is being prepared.

Minnesota Electronic Filing

Disqualifying diagnostic 45307 no longer issues when only the Individual preparer code is entered on the Return Options > Preparer Information - Overrides Office Manager > Individual preparer code field.

New Jersey

Form NJK-1 no longer includes footnotes from other states.

New York Electronic Filing

Form IT-225 presents U.S. interest as a net number since there is no corresponding code for expenses allocated to U.S. interest. Form IT-225 presents code 203 as a subtraction for municipal bond interest expenses.

Pennsylvania

Form PA-41, Schedule N, Part 3, Line 4, Nonresident Tax Withheld, now reflects Line 3, Total Nonresident Share of Distributed/Distributable Income, times the withholding rate of 3.07 percent.

Texas

Texas custom filing instructions will now print in the accountant's and client's copies of the 1041 return.

Estate & Gift (706/709) Product Updates

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New York

Applicable credit calculations are added to Line 10 of Forms ET-130 and ET-133.

Intangible property is included on Line 2 of Forms ET-130 and ET-133 for nonresidents, and a supporting statement is prepared.

Exempt Organization (990) Product Updates

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Federal

Government form links have been expanded for Form 990-PF, Page 10, Private Operating Foundations.