

CCH Access™ Tax
2014-3.0 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)

To access a list of CCH Access Tax Release Notes for the current year and for prior years, visit the [Release Notes](#) page on our Customer Support site.

Highlights for Release 2014-3.0

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2014 Tax Updates

Approved Forms and States (for Paper Filing)

Many forms that had the Approval Pending watermark on Release 2014-2.7 have been updated to Final status with Release 2014-3.0. The Forms Release Status database on the Support Web site shows status for forms updated on this release. Some of the major forms moving to Final status include the following:

- **Individual, Partnership and S Corporation.** Connecticut - Form OP-424
- **Partnership.** New Jersey - Form NJ Part-100
- **Partnership and S Corporation**
 - ◆ Illinois - Sch K-1(p3)-FY
 - ◆ Ohio - Form IT-4708
- **Partnership, S Corporation and Fiduciary.** Ohio - Form 1140, 1041-ES
- **Corporation and S Corporation**
 - ◆ DC - Form D-20CR
 - ◆ Wisconsin - Form Corp-ES
- **Fiduciary**
 - ◆ Indiana - Form IT-41-ES
 - ◆ Louisiana - Form 541

Fiduciary

Form 3115. Application for Change In Accounting Method is now available for processing. Input for this form is located on the Worksheet "3115 - Application for change in accounting method." This form is also available for electronic filing. The update includes all filing instructions and white paper statements to support the Form 3115.

2014 Electronic Filing

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

- **Partnership.**
 - ◆ Connecticut Extension
 - ◆ West Virginia
- **Corporation.** West Virginia
- **S Corporation.** West Virginia
- **Fiduciary.** West Virginia

Tax Product Updates

Individual (1040) Product Updates

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Federal

Amounts entered on Interest > IRS 1099-INT > Bond premium and Consolidated 1099 > Form 1099-INT Interest Income > Bond Premium are not included in income.

Form 8962. When multiple 8962 - Health Insurance Marketplaces worksheets are entered that are associated with the same Business worksheet, the sum of the premiums for all those associated are used in the calculation of the allowed self-employed health insurance deductions and the premium tax credit.

Form 8965. Line 5 of the Marketplace Coverage Affordability Worksheet will use the federal poverty line for Hawaii, if the taxpayer was a part-year resident of Hawaii during any portion of the year, as stated in the instructions.

Net operating loss carryovers to 2015 originating in 1998 are included on the carryover report.

Form 5329 will print with zeroes in each of the "Additional Tax" lines when the option is chosen on the Return Options worksheet > Form Printing Options section > Mandatory printing of Form 5329 field.

Form 8858, answers to Schedule G questions, will be updated accordingly when previous input is removed or changed.

Electronic Filing

Batch Extensions. The Form 4868 that prints upon export when batch extensions will include both the taxpayer's first and last names when the filing status is not married filing joint.

Form 8867. Line 22, Does Not Apply, box is checked if the dependent is non-qualifying for Schedule EIC.

Schedule EIC. The credit calculation has been changed in the following instances:

- Single filing status with 3 dependents in the earned income range of \$17,830 to \$17,849 calculates a credit of \$6,143 instead of \$6,144.
- Single filing status with 2 dependents in the earned income range of \$17,830 to \$17,849 calculates a credit of \$5,460 instead of \$5,461.
- Single filing status with 1 dependents in the earned income range of \$17,830 to \$17,849 calculates a credit of \$3,305 instead of \$3,306.
- Single filing status with 0 dependents in the earned income range of \$8,110 to \$8,149 calculates a credit of \$496 instead of \$495.
- MFJ filing status with 3 dependents in the earned income range of \$23,260 to \$23,299 calculates a credit of \$6,143 instead of \$6,144.
- MFJ filing status with 2 dependents in the earned income range of \$23,260 to \$23,299 calculates a credit of \$5,460 instead of \$5,461.
- MFJ filing status with 1 dependents in the earned income range of \$23,260 to \$23,299 calculates a credit of \$3,305 instead of \$3,302.
- MFJ filing status with 0 dependents in the earned income range of \$13,540 to \$13,549 calculates a credit of \$497 instead of \$496.

- MFJ filing status with 2 dependents in the earned income range of \$49,150 to \$49,185 calculates a credit of \$4 instead of \$3.

The alternative email value is properly reflected in the notifications section of the program for situations where preparer acceptance notification has been suppressed, but preparer rejection notification to an alternate email address has been requested.

Alabama

Form PPT apportionment worksheet, Line 27, includes Line 25c.

Arkansas

Farm rental (Form 4835) income flows to AR1000F and includes the bonus/179 depreciation add-back rather than the amount from the federal return.

Connecticut

State 8960 does not use the Federal Line 7 Worksheet.

Connecticut Electronic Filing

Returns with supplemental withholding no longer cause reject CT013-MEF-IND.

Hawaii

The year reference has been updated on the election to carryforward any net operating loss on the N-109.

Illinois

Schedule 1299-C prints when there is an amount present on Step 4, Line 30.

Schedule NR, Step 3, Line 37, matches the federal adjusted gross income reported on IL-1040, Step 2, Line 1, when there is a NOL carryforward.

Indiana


IT-887,9 Line 1, equals Federal AGI.

Iowa

Form IA 1040, Line 18, health insurance deduction, is limited to zero.

Iowa Electronic Filing

Effective with the enactment of Senate File 126 on February 17, 2015, Iowa tax provisions are coupled with federal provisions retroactive to January 1, 2014 in the areas listed below.

 **Note:** Iowa did not couple with the bonus depreciation provisions allowed for federal tax purposes for the 2014 tax year.

For Individual Income Tax Filers Only:

- Deduction of Educator Expenses
- Tuition and Fees Deduction for Higher Education

- Election to Deduct State Sales/Use Tax as an Itemized Deduction in lieu of State Income Tax
- Treatment of Mortgage Insurance Premiums as Qualified Residence Interest
- Tax Free Distribution from an IRA to Certain Charities for Individuals 70½ and Older

For Individual Income Tax as well as Corporate Income Tax (including S Corporations), Partnership, Fiduciary, and Franchise Tax:

- 2014 section 179 limit for Iowa is \$500,000, which is the same as the federal section 179 limit. The phase-out threshold is \$2 million.

To electronically file returns with educator expenses deduction and/or tuition and fees deduction on Form IA 1040, Line 24, customers must update to release 2014-3.0.

Returns with educator expense deduction and/or tuition and fees deduction on Form IA 1040, Line 24, must be calculated on release 2014-3.0 to electronically file. The updated schema that allows these Iowa adjustments was published by the Iowa Department of Revenue on 02/22/2015.

Kentucky

When calculating Form 740-NP Schedule A, Line 13 for a joint return, the calculation will not be overridden by the result of a married filing separate return.

Maine

Schedule 1 Worksheet, Line 1, calculates taxable IRA distributions.

State and local taxes entered on IRS-W2G are included on Schedule 2, Line 2a.

Missouri

Form MO-NRI, Part B, Line T, reflects modifications only from Missouri sources.

Nebraska Electronic Filing

Form 1040N, Line 27, equals the lesser of Line 17 minus Line 26 or the federal tax line when Line 12 minus Line 13 is less than \$5,000. This prevents reject code F1040N-0108.

New Mexico

Form PIT-1, Line 35, includes an exemption code when no underpayment penalty is calculated.

North Carolina

The Department of Revenue refund phone number is correct in the filing instructions.

Input in the North Carolina Estimates/Underpayments > Estimate Preparation section > Change in federal adjusted gross income field adjusts Form D-40, Line 1.

Ohio

Form IT 1040D, Lines 6 and 22, now calculate correctly when there is not a Form 2023 present in the return.

Form SBD, Line 4, correctly calculates when there is a rental or royalty loss.

Schedule K-1 income flows to the IT 1040D when there is no Form IT 2023 in the return.

Oregon

Form 40 reflects the correct signature block for the signer's address entered in the return configuration set.
The Special Oregon medical subtraction minimum age is now 63.

Pennsylvania

Pennsylvania Form 8960, Line 1, includes interest amounts that were Jointly coded.
The Pennsylvania Limited Liability Company worksheet > RCT-102 Capital Stock Tax Manufacturing Exemption Schedule section > Land and Leasehold improvements fields allow separate input.
Pennsylvania RCT-101 prints with the government copy when electronic filing is turned off.
The Preparer Information section includes the date signed by preparer when requested.
REV-1630A will not print when REV-1630/REV-1630A are suppressed.
Schedule A produces from 1099R code 25.
Schedule A, Line 16, is limited to zero.

Pennsylvania - Philadelphia

Form WTR produces when multiple W-2's are present in the return.

Rhode Island

The Rhode Island Property Tax Relief Credit will calculate if the taxpayer is 65 or older or they are disabled.

South Carolina

SC 1040, Line b, limits out of state losses by the special allowance for rental real estate activities for states that do not have an income tax provision.

Wisconsin

Medical care deduction statements containing Premium Tax Credit amounts take into consideration the taxpayer/spouse and self-employment income breakdown on Form 8962.

The fourth quarter estimate due date referenced in the letters and filing instructions now reflects January 19, 2016.

Partnership (1065) Product Updates

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Federal

Schedule C is no longer produced for tax returns with "total assets" (Form 1065, Schedule L, Line 14) less than \$50 million but adjusted total assets (Schedule M-3, Line B) greater than \$50 million.

Form 3115. IRS Revenue Procedure. 2015-13 has been released. The threshold for an IRS Section 481(a) adjustment has been increased to \$50,000. Form 3115, Part IV, Line 26, has been updated to reflect this change.

Form 8805, Line 10, will be calculated for each type of income as follows: Income less state and local taxes, less certificates, limited to a minimum of zero, times the appropriate rate. Non-corp partners will then add the non-corp + 28% + 25% + 20% to get the amount on Line 10.

Form State 4562 for California brings over the Section 179 from a pass-through entity.

The option "Print Form 8586 regardless of applicability" is added to the Credit > 8586 and 8609 - Low Income Housing Credit > Low Income Housing Credit section.

Schedule K-1. Form 8820 credit is now included on Schedule K-1, Line 15p.

Schedule K-1. Item L no longer includes disallowed Section 179 expense when Item L is not required in the return.

Schedule K-1. The ending capital line of Schedule L is now blank when input is present to suppress Schedule L.

Schedule K-1. The K-1 copy of Form 8283, Page 2, Part 1, Line 4, is updated to correct the print positions of the check boxes in Line 4.

Schedule K. The statement for Line 17b, adjusted gains and losses, is updated to better reflect amounts that have special rates applied to them.

The state code of AR is removed from the list of states that uses Federal > Common State > Nonresident Schedule K-1 Equivalent > State Code.

Alabama

The Schedule K-1 Line G, limited partner check box option, is now included on Common state > Generic State Schedule K-1 Information > Generic Partner Input > State use check box 2.

Alabama Electronic Filing

Electronic filing diagnostic 43581 is no longer issued for a Schedule K, Line 15, rounding error.

Electronic filing diagnostic 46020 is now issued for missing PDFs that support Form PPT, Page 2, Line 10.

Arizona

Form K1(NR) now includes in Line 16, Other Deductions, the partner's share of retirement payments as input in Partners > Partner Information > Other Payments / Printing Percentage Overrides / Other Options.

Special allocation code 3622 now allocates Form 165 K-1 Part 3, Line 5B, according to special allocations set up on Special Allocations - Special Allocation Detail.

California Electronic Filing

The status report for returns that include Form 568 now include the information from the current electronic filing status.

Connecticut

Form CT-OP424. The check boxes will now print correctly.

Hawaii

Schedule K-1, Line G, Columns c and f, have been adjusted in order to follow the federal calculations for the partner's capital account information.

Illinois

Federal 1065 or 1065B, Pages 1-5, are now included in the printed government copy.

Schedule B, Page 2, Column E, Member's Share of Distributable Base Income or Loss, now matches the worksheet in the instructions. A statement for each member will now print with Schedule K-1-P showing the calculation.

Schedule K-1-P instructions are now only included in the K-1 copy of the return.

Indiana

Form IT-65 and Form IN K-1 will now show code 822 when entered on the Indiana > Credits > Pass through Credits section.

Indiana addback/deduction code 136 now appears on IN K-1, Lines 18-26, when entered on the Indiana > Income and Deductions worksheet > Modifications to Federal Net Income section.

Indiana statement of interest and penalties will now reference Line 14 for the current year tax on line in both the late payment penalty and late interest sections.

IT-65 and IN K-1 removed addback code 136 for partnership per revised IN list of addback/deductions/credit codes. IT-65 and IN K-1 credit codes 800, 801, 802, 806, 808, 812, 814, 818, 819, 823, 824, 826, 827, 828, 829, 830, 832, 835, 836, 842, 843, and 850 have been added per revised IN list of addback/deductions/credit codes.

IT-65, Line 10, will now include other pass through credits per IN for partners included on the composite return.

The 120 addback/deduction code will now appear on the K-1, Lines 18-26, when entered on the Indiana > Income and Deductions worksheet > Modifications to Federal Net Income section.

Kentucky

Form 765GP, Page 3, Line 4e is now equal to KY Schedule D, Line 15.

Maine

Form 941P-ME is now suppressed when the input option to suppress is chosen.

Form D30, Combined Reporting Schedule 2, Line 32, now includes zero as a factor in the calculation.

Michigan - Grand Rapids

Michigan Cities Common Form. Form CF-1065 Schedule 2 will now calculate a tax when the partnership is electing to pay tax on behalf of the partners.

Minnesota

Estimated tax calculation now excludes the minimum fee from estimated tax amount for businesses not subject to minimum fee (those with more than 80% of income from farming, and those that are qualified businesses participating in a JOBZ Zone).

Help text for Partners > Partners Information > Minnesota > Force composite when source income below threshold now describes the force option and refers to the current year withholding threshold.

New Hampshire

Form BET, Business Enterprise Tax Return, Total Gross Business Receipts line, has been updated to not include Guaranteed Payments from Form NH-1065, Business Profits Tax Return, Line 1(d).

Form NH-1065-ES, Estimated Partnership Business Tax, Line 4, has been updated to show the total of Line 2 less Line 3. The payment vouchers will still be rounded for equal payments. Form NH-1065-ES, Line 5, Overpayment of estimate, has been updated to flow to the Tax column that has been selected from input. The condition of when Form NH-1065-ES should print has been updated.

New Mexico

Schedule K-1 equivalent, Line 2, will now include both guaranteed payments and interest income.

New York

Form IT-204-CP, which includes Title 9A for corporate partners in the K-1 print sets, are updated for print positions.

Form IT-639, Page 2, Line 4, no longer include amounts from IT-639, Page 1.

Pennsylvania

Pennsylvania Form REV-799 will no longer activate and print when the RCT-101 is not active.

Pennsylvania - Philadelphia

The statement for depreciation adjustment that prints for the BIRT return now prints for the BIRT-EZ return and adjusts the amount of income for the depreciation adjustment the same as the BIRT return.

Rhode Island Electronic Filing

Federal Form 8453 that is being attached to the electronic file no longer causes the Rhode Island return to reject.

Tennessee

Forms FAE 170 and 174, Schedule J-1, Line 2, will now pull numbers from Federal 1065, Schedule K, Lines 2-11.

Texas

Corporation principal office and principal place of business lines will now fill state and ZIP code when input exists at the Texas level.

Wisconsin

Schedule DE prints multiple pages if more than twenty solely owned LLCs are listed.

Corporation (1120) Product Updates

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Federal

The option "Print Form 8586 regardless of applicability" is added to the Credit > 8586 and 8609 - Low Income Housing Credit > Low Income Housing Credit section.

Transmittal Letters/Filing Instructions. The option to print paper instructions when an electronic filing return is disqualified has been updated for new electronic filing states.

Power Pack

The expand screen for "List of Loss Reserves" for treasury composite factors can now navigate to the IRS list of factors for your review.

Alaska

The tax calculation on taxable income amounts between \$124,000 and \$147,999 has been updated to match Tax Rate Table B.

Connecticut

Forms CT-1120EXT and CT-1120X print the name of the parent company and no longer the name of the consolidated shell return.

Connecticut Electronic Filing

The filing instructions for electronically filed extensions will now fill completely.

The filing instructions for electronically filed extensions will now show the correct paragraph.

Illinois Electronic Filing

Electronic filing diagnostic 34515, indicating electronic payment is required, will no longer issue unless the annual tax liability is \$20,000 or more.

Indiana

The IT-20 addback code 136 has been made inactive per revised information received from Indiana. The current year tax on the penalties and interest statement now references IT-20, Line 41.

Kentucky Electronic filing

The Form 720-V, KY Corporation/LLET Account No. field now includes input on Federal > Common State > State/City Common Data > General Information > Account/file number.

Form 8879(C)-K, the name of authorized representative field, now includes input on Federal > General > Electronic Filing > Electronic Signatures > Signing officer's name.

Maryland

Maryland has provided updated Form 500 instructions. The Wineries and Vineyards Tax Credit from Form 500CR, Part W, Line 20, will now be included on Form 500, Line 7f.

Maryland Electronic Filing

The postal code for the return and the foreign province for the extension will now be included in the corresponding electronic file when a foreign country is entered on the Federal > General > Basic Data > General section. Corresponding diagnostics 47152 (return) and 56893 (extension) have been updated and will not require a state code or ZIP code.

Michigan

Form 4899 has been updated to not calculate a penalty when the prior year tax is less than \$20,000.00 and estimated tax payments have been made equal to the prior year tax.

Michigan - Detroit

The custom filing instructions will now be available for review.

New Jersey

The New Jersey Banking Form, BFC-1, along with related forms and schedules, are updated to final versions.

Texas

The state code on the 05-167 Section A for each officer will now fill correctly when pulling from Officer information at the Federal level.

Utah

The Utah TC-599 filing month will now appear in all situations.

Wisconsin

Schedule 4V, Line 7, and Schedule 4W, Line 9, show the amount of depreciation difference between Wisconsin and federal, including differences due to different elections for assets placed in service in 2014.

S Corporation (1120S) Product Updates

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Federal

The grammar has been updated on several paragraphs to print "I" or "my" if the Letters and Filing Instructions > General Letter > Use "I" in all letters field is selected.

The option "Print Form 8586 regardless of applicability" is added to the Credit > 8586 and 8609 - Low Income Housing Credit > Low Income Housing Credit section.

The Schedule of Mineral Interest Properties is updated to prevent the 12th property from being lost during print.

Alabama Electronic Filing

Alabama electronic filing diagnostic 46005 for missing Retained Earnings PDF no longer issues in error when the PDF is attached.

The Form PPT Firm name field now includes information from the return configuration set State Signature Block. Electronic filing diagnostic 49397 is no longer issued when using the return configuration set State Signature Block.

Indiana

IT-20S, Line 19, now includes other passthrough credits per IN when included on the composite return. A supporting statement will now appear to show the amount of passthrough credits appearing on IT-20S, Line 19.

IT-20S, Lines 2a-e, and IN K-1, Lines 18-26, will no longer show addback/deduction code 136 per Indiana's updated addback/deductions/credit codes list.

The State tax refund report for Indiana no longer shows a refund when the return contains balance due.

New Jersey

The New Jersey Banking Form, BFC-1, along with related forms and schedules, are updated to final versions.

Oklahoma

The Form 512-S and Form 514 Transmittal Letter and Filing Instructions will be included in the Government copy when the option to include them is entered under the Federal > General > Letters and Filing Instructions Worksheet > General Letter Section > Print option line. The Franchise Tax return Transmittal Letter and Filing Instructions will no longer have the paragraph referencing the Shareholders' Schedule K-1s.

Pennsylvania

The Pennsylvania PA20S, Page 2, Part VII, Line 10, has been updated to automatically mark "Y" when Form 3115 is present in the Federal return. Pennsylvania RCT-101, Page 4, Sch C-1, Lines 4A and 4B, have been updated to no longer print, if not applicable.

Rhode Island

Form RI-1099PT. The taxpayer's ID will now mask for the Accountant, Client, and K-1 copies when the option to mask is selected from the print dialog.

Vermont

Question B on Form BI-471 will check Yes when the apportionment factor on BA-402 is zero.

Virginia

Letters and filing instructions are updated to reflect the state's change to the payment guide Web site. The new payment guide link is:

[Electronic Payment Guide1214.pdf](#)

Wisconsin

A statement has been added to Schedule 5K-1 to show shareholders' share of the basis of pre-2014 assets adjustment. The basis adjustment can be specially allocated using code 53891. The basis adjustment is no longer specially allocated using code 53603 (Ordinary Income) or 53605 (Rental Real Estate Income).

Final year returns with a remaining balance of pre-2014 basis of assets adjustment receive the full remaining balance of the calculated amount of the adjustment in the current year instead of 20% of the full calculated adjustment.

When filing as a corporation the amount of pre-2014 basis adjustment on Schedule 4V, Line 7, or Schedule 4W, Line 9, show 20% of the total computed adjustment.

Fiduciary (1041) Product Updates

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Federal

Form 3115, Application for Change In Accounting Method, is now available for processing. Input for the form is located on the worksheet "3115 - Application for change in accounting method". This form is also available for electronic filing. The update includes all filing instructions and white paper statements to support the Form 3115.

Qualified dividends that are net investment income will carry to the Ordinary Income Worksheet, accumulated net NII post 2012 column, Line 1.

Form 8960. Other portfolio income from a passthrough will now be included as net investment income for state 8960's.

The alternative print sequence will now include the PDF report and the electronic filing report.

The federal Schedule K-1 will be disqualified if the identification number of the beneficiary has a social security number or federal employer identification number with missing hyphens or hyphens entered in a wrong place or the number of digits is incorrect.

The transmittal letter paragraph will no longer show an invalid symbol before the date.

Electronic Filing

Disqualifying diagnostic 46489 will now issue when Form 41, *May the IRS discuss this return with the preparer shown below?*, is marked Yes and the preparer phone number is not present on the Return Options worksheet, Preparer Information section, or in the return configuration set.

Grantor returns utilizing open lines for additional information will no longer be disqualified if the description is filled in and the amount is zero.

Alabama

Form 41, Page 1, Paid preparer signature only fill when the option to print the preparer signature has been selected on the Return Options worksheet, Preparer Information section, on Interview Form 3, Box 47, or in Office Manager.

Form AL8453-FDT, Line 7 - will now only include the amount paid electronically.

The date signed by the signing officer will now include the current date when no date has been entered on the Electronic Filing worksheet, General section, Date signed by taxpayer or on Interview Form EF-1, Box 64.

The transmittal letter and filing instructions will now reference the applicable signature document, Form AL8453-FDT.

Colorado Electronic Filing

A disqualifying diagnostic will now generate if a line item on Schedule E has a blank description.

Georgia Electronic Filing

The Electronic Filing > General Section, Line 1, will now override the return configuration set for determining whether to electronically file a return.

Illinois

The IL Schedule D, Step 1, Line 1, will now include nonbusiness gains/losses from beneficiaries K-1-T, so the amount could be negative.

The Illinois Schedule NLD form will print the correct amount on Line 5 for all pages.

Minnesota Electronic Filing

When pulling Paid Preparer information from the return configuration set with a default preparer, the PTIN/SSN will fill in the Header and diagnostic 45307 will not issue.

Mississippi

Form MS 81-110, Page 1, Name and Title of Fiduciary, will print on correct lines.

Missouri Electronic Filing

Attaching a PDF document to the Missouri file will no longer generate a PDF error upon export.

Nebraska

Nebraska Form 1041N, Page 1, Paid Preparer's information, will now fill with data input from the return configuration set, and then update with any overrides entered on General > Return Options > Preparer Information.

Nebraska Form 1041N, P. 1, Paid Preparer's Information, now fills with Firm's Name (or name of individual if self-employed), Address and Zip Code from the return configuration set or overrides input on General > Return Options > Preparer Information.

New York Electronic Filing

Returns with missing name controls will be disqualified from electronic filing.

Returns without PTINs or SSNs will now be disqualified from electronic filing.

The extension will be disqualified if any of the federal requirements for a name control are violated.

Pennsylvania

Schedule B Adjustments will now be reflected in the amount on Form 41, Line 2.

South Carolina

The number of characters on Form SC1041, Page 1, paid preparer's section for the Firm name and address to expand the line when small fonts are used, has been updated.

Wisconsin

Line 13 of Schedule 2K-1 will include Schedule K-1 Other Information instead of printing on a separate statement.

Estate & Gift (706/709) Product Updates

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Federal

Entering "Include in government copy" in the General > Letters and Filing Instructions > General Letter > Print option field causes the transmittal letter to print in the Government copy of the return.

Exempt Organization (990) Product Updates

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California

When a Federal Schedule B contributor code indicates a combination of cash and noncash, the aggregate contributions less the FMV will be treated as a cash contribution on Form 199. The FMV portion will be treated as noncash.

Illinois

Form IL-990-T-X, Lines 19 through 23, are updated for print positions.

Virginia Electronic Filing

Form 500, state of incorporation, will no longer transmit both the state and country of incorporation if both have been entered on Federal > Common State > General Information > Where incorporated and Foreign country incorporated. The country will be transmitted if both are entered; otherwise, the state will be transmitted.