

CCH Access™ Tax
2015-2.4 Release Notes

January 31, 2016



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 Release Notes

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CCH Access™ Tax Release Notes inform you of the enhancements and updates that were made to Tax products and systems with the current release.

Information provided in the Release Notes include the following:

- Contact and Support information
- Updates to Tax technology (such as, electronic filing updates, Organizer, roll forward, and technology enhancements)
- Updates made to Tax products (such as, form additions and updates, changes in diagnostics, and 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 2015-2.4

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Tax Updates

Individual

The following product is available on this release: Tax Equalization

Individual (Included with Release 2015-2.3)

Tax Projector is now available.

Individual, Partnership, Corporation and S Corporation

Lexington and Louisville Occupational License Tax forms are now available in our software. This includes:

- Louisville Form OL-3, Louisville Metro Revenue Commission Occupational License Tax Return
- Lexington Form 228, Lexington-Fayette Urban County Government Net Profits License Fee Return
- Lexington Form 228-S, Board of Education of Fayette County Net Profits Occupational License Tax Return

Estate and Gift

We added preliminary Form 8971, Information Regarding Beneficiaries Acquiring Property from a Decedent, as a library form with this release. We continue to work on improving this form's calculations in anticipation of receipt of the final version. To produce this form, make an entry in Estate Tax > Form 8971 > Preparation > Prepare Form 8971 or manually complete the form.

Electronic Filing

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

Individual

Alabama LLC	Mississippi
Delaware	New Hampshire
Idaho	New York
Illinois	North Carolina
Indiana	Ohio Cities - RITA
Louisiana	Oregon
Louisiana Extension	Pennsylvania
Michigan Cities	West Virginia
Minnesota	Wisconsin
Minnesota M1-PR	

Partnership

Illinois
New Jersey
Pennsylvania
Pennsylvania Extension
Philadelphia

Corporation

Illinois	New Jersey Annual Report
Illinois Consolidated	Pennsylvania
New Jersey	Pennsylvania Extension
New Jersey Extension	Philadelphia
New Jersey Estimates	

S Corporation

Illinois	New Jersey Annual Report
New Jersey	Pennsylvania
New Jersey Extension	Pennsylvania Extension
New Jersey Estimates	Philadelphia

Fiduciary

Arkansas	Massachusetts
Colorado	Massachusetts Extension
District of Columbia	Missouri
Georgia	New Hampshire
Maine	

Protecting Americans from Tax Hikes Act of 2015

On Friday, December 18, 2015, the Protecting Americans from Tax Hikes (PATH), commonly known as "Tax Extenders," was signed into law. Forms affected by PATH are still under review by the IRS, and CCH will continue to use draft versions of these forms until the IRS releases final forms. The IRS has not given any time frame for updating the affected forms, but we are monitoring their actions closely and will release forms as they are finalized. Until then, the affected forms will continue to have the "Reserved" fields on them.

Release 2015-2.4 contains these final, approved forms:

- Form 8844
- Form 8845
- Form 8900
- Form 8908
- Form 8911

This is the current status of all PATH forms:

Form 1040 - Released
Form 1040A - Released
Form 1040NR - Released
Form 1040 Schedule A - Released
Form 4136 - Released
Form 5695 - Released
Form 6478 - Released
Form 6765 - Projected for 2/7/16

Form 8689 - Released
Form 8835 - Not Extended by PATH
Form 8844 - Released
Form 8845 - Released
Form 8864 - Released
Form 8900 - Released
Form 8908 - Released
Form 8911 - Released

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 3520, Page 1, Lines 1f (state or province) and 1g (ZIP or foreign postal code) print.

Form 4970. To use the foreign earned income tax calculation for recomputing 2014 tax, make an entry in Taxes > Tax on Accumulation Distribution of Trusts > Preceding Years' Taxable Income and Tax Adjustments > Foreign itemized deductions or exclusions.

Final versions of Form 3115 were received from the Internal Revenue Service and are available form processing.

Partnership (1065) Product Updates

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Federal

Final versions of Form 3115 were received from the Internal Revenue Service and are available for processing.

Colorado

Form 106, Boxes F and G, print positions were updated

The composite payments worksheet will no longer pick up other state's prior year overpayment.

Florida

Bonus depreciation statements for Form F-1065 and K-1 Equivalent now reflect the correct year.

Minnesota

Estimated tax payment vouchers. When using overrides with different amounts for payments, vouchers now print in the correct order.

Ohio

Form IT/SD 2210, Interest Penalty on Underpayment of Ohio Income Tax, was received from the taxing authorities. The program was updated accordingly.

Wisconsin

An entry for a third party designee from the Wisconsin > General > Basic Data worksheet, Line 16 (Designee's PIN), flows to the signature sections of Form 3, Form PW-1, and Form 1CNP.

Schedule RT related entity expense additions and subtractions were added to the line calculations for Schedule 3K and Schedule 3K-1, Lines 1 through 11. The Schedule RT input on the Wisconsin > Income/Deductions > Schedule RT - Related entity expense disclosure worksheet was added. "Line" fields in which the line number the addition or subtraction should be carried to on Form 3 and Schedule 3K-1 can be entered. Lines 1 through 11 are valid for partnership returns. A field for subtraction type was added to specify if the input is for an allowable related entity expense or disallowed related entity expense. Special Allocation code 53929 was added for the disallowed related entity expenses. Some additional data entry is needed to properly carry the amounts from Schedule RT to Form 3 and Schedule 3K-1.

Corporation (1120) Product Updates

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Federal

Final versions of Form 3115 were received from the Internal Revenue Service and are available for processing.

Printing of Form 8810 supporting schedule, Reconciliation of Passive Items for Book/Tax Purposes, is now suppressed. It now only appears on the menu or the tree when Form 8810 is present and allowed passive loss carryover or disallowed current passive losses are present in the return.

S Corporation (1120S) Product Updates

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Federal

Custom Extension Filing Instructions. The Prepared By section now prints the same information as on the custom filing instructions for the return.

Final versions of Form 3115 were received from the Internal Revenue Service and are available for processing.

Maine

Composite Form 1040ME, Lines 16, 19, and 20, now print on the correct lines.

Wisconsin

Schedule 5K and Schedule 5K-1 were modified for the addition and subtraction of related entity expenses on Lines 1 through 10. As a result, fields on the Wisconsin > Income/Deductions > Related Entity Disclosure Statement worksheet were updated. The new "Line" field allows the addition or subtraction to be assigned to a line number of the Schedule 5K and 5K-1. The addition or subtraction takes place on the line that has input and carries to the Additions and Subtractions section. Special Allocation code 53929 was added for related entity disallowed expenses. This change requires that the input of related entity expense items be relocated or changed.

Fiduciary (1041) Product Updates

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Federal

Final versions of Form 3115 were received from the Internal Revenue Service and are available for processing.

Connecticut Electronic Filing

Custom filing instructions now reference direct debit information, when present.

The Schedule K-1 transmittal letter no longer includes a reference to mail Schedule CT K-1T in letters or filing instructions if the return is filed electronically.

Estate & Gift (706/709) Product Updates

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Federal

We added preliminary Form 8971, Information Regarding Beneficiaries Acquiring Property from a Decedent, as a library form with this release. We continue to work on improving this form's calculations in anticipation of receipt of the final version. To produce this form make an entry in Estate Tax > Form 8971 > Preparation > Prepare Form 8971 or manually complete the form.

Issues Addressed

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Issues for the following CCH Access™ Tax features were resolved and are now available.

Tax - Individual

Our Update Pro Forma feature is now available for the following two issues. We will alert you when any affected return is opened and provide you an option to correct the rolled forward data.

- Nonconsecutive rolled forward W-2s (138202)
- 1099-R multiple versions (138852)

Tax - Fiduciary

Our Update Pro Forma feature is now available for Pro Forma of NY Form IT-204-LL. We will alert you when any affected return is opened and provide you an option to correct the rolled forward data.

Tax - Partnership

Our Update Pro Forma feature is now available to resolve the issue regarding Pro Forma of partners' beginning capital balance. We will now alert you when any affected return is opened and provide an option to correct the roll forward data.