

CCH Access™ Tax
2015-2.7 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 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 2015-2.7

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2015 Tax Updates

Individual

Our Update Pro Forma feature is now available to bring forward Form 1099R foreign and state information and Form 1095-A shared allocation data. We will alert you when any affected return is opened, and provide an option to add this information to the 2015 return.

Individual Ohio forms are fully approved. The watermarks have been removed.

Electronic Filing

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

Individual

Ohio Forms IT-BUS and IT Schedule of Credits are now available.

Partnership

Georgia	Wisconsin (Included with Release 2015-2.6)
West Virginia	

Corporation

Alabama CPT	New York City Extension (Included with Release 2015-2.6)
Georgia	Rhode Island
Georgia Consolidated	West Virginia
Kentucky Extension	West Virginia Consolidated
Massachusetts Unitary	

S Corporation

Georgia	Rhode Island
Indiana	West Virginia
Kentucky Extension	

Fiduciary

Alabama	Iowa
Idaho	New Mexico

Electronic Filing Status System

You will now see the Account column expansion to display the account number plus the region, office, and business unit. We restored this functionality with release 2015-2.6.

Batch Electronic Filing of Extensions

Batch electronic extension filing of the following taxing authorities were included with Release 2015-2.6:

Partnership

Connecticut

S Corporation

Connecticut

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 2210, Line 3, includes the premium tax credit from Form 8962.

FSC. When the TSJ code on 8962 - Health Insurance Marketplace > Form 1095-A is blank, one half of the advanced premium tax credit is reported in the taxpayer's column of the Federal Tax Comparison for Married Filing Joint and Separate and one half in the spouse's column.

Schedule F, Line 4b, does not include Conservation Reserve Program payments per instructions. The CRP payments carry to Sch SE, Line 1b.

Connecticut

When a Connecticut extension is not filed because the Federal extension is filed and no payment is made for CT, the extension letter now says no extension is required.

Illinois

Schedule CR, Line 20b, fills with the amount from Line 20a, unless an override is present.

Maryland

When both taxpayer and spouse are entitled to military retirement subtraction on Form 502SU or 505SU, each taxpayer receives a maximum subtraction of \$5,000 (\$10,000 if age 65 or over).

Massachusetts

The time and date stamp at the bottom of each form shows the current year.

Michigan

If taxpayer, spouse, or deceased spouse's date of birth makes them qualify for Form 4884, Sections A, B, or C, then the correct Section A, B, or C produces. If taxpayer or spouse's date of birth is in 1953, Section D is produced.

North Carolina

Form D-400TC, Line 2, includes the amount of foreign capital gains before reduction for the capital gain rate differential reduction used in calculating foreign income for federal foreign tax credit calculation purposes.

Ohio

Ohio Schedule of Credits, Lines 2 through 5, calculate only when the amount on Ohio IT 1040, Line 5, is less than \$100,000.00.

Ohio Electronic Filing

The low income exemption credit must be present even when no credit is calculated.

Oregon

The tuition deduction is allowed and limited to \$4000 on Oregon when the American Opportunity credit and Education credit are claimed on Federal Form 1040.

Pennsylvania

The Form PA-1000 due date is now June 30, 2016 in the filing instructions and transmittal letters.

Pennsylvania - Pennsylvania Cities

Estimated tax payments entered in the Payments/Penalties > Payments > City Estimated Tax Payments worksheet section flows to the proper jurisdiction.

Rhode Island Electronic Filing

Preparer Information will not be included in the electronic file when a non-paid preparer code is entered.

Partnership (1065) Product Updates

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Federal

Electronic filing diagnostic 47629 for various credit forms with Reserved lines is turned off on previously calculated returns.

Estimate Reminder Letter. The 4th quarter letter no longer shows erroneous paragraphs at the end of the letter.

Schedule K-1. Any issues with the partnership input created by Pro Forma Update are corrected with this release.

Arizona

Form 165 Schedule K-1(NR). The state numbers are no longer adjusted when K-1 amounts are the same for federal and Arizona purposes.

Kansas

Special allocation modifications are allowed on Form K120S, Part II, Lines 5, 6, and 7.

Corporation (1120) Product Updates

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Georgia

Form 600, Page 4, Line 2, Credit remaining from previous years, was revised to include only the calculated remaining carryover amount and not the total generated credit amount from prior years.

New Jersey

Extension filing instructions are now produced for New Jersey Form CBT-200-TC when the extension is present.

S Corporation (1120S) Product Updates

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West Virginia Electronic Filing

West Virginia Direct Deposit/Debit report and letters now display when direct deposit is selected.

Fiduciary (1041) Product Updates

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Federal

Form 8960, Line 18c, is limited to zero when there is a charitable deduction and the mandatory printing option is chosen.

Maryland

Form 504, Schedule K-1, now applies the print masking option for the beneficiary Social Security Number or Employer Identification Number.

Oregon Electronic Filing

The transmittal letter and filing instructions now reference Form 8879-F, IRS e-file Signature Authorization for Form 1041, or Form 8453-FE, U.S. Estate or Trust Declaration for an IRS e-file Return, as applicable per IRS guidelines.

Pennsylvania

Schedule B, Line 8, Other addition adjustments, now excludes tax exempt interest.

Estate & Gift (706/709) Product Updates

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Federal

For estates filing Form 8971 and Schedule(s) A, until transmittal letters and filing instructions are added, a diagnostic is issued containing instructions for when and where to file.