CCH Axcess™ Tax

2015-3.0.1 Release Notes

March 6, 2016

CCH Axcess™

At the Center of the Firm in Motion

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 Axcess™ 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 Axcess™ Tax Release Notes for the current year and for prior years, visit the Release Notes page on our Customer Support site.

Highlights for Release 2015-3.0.1

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Tax Updates

Individual

Final updates for Tax Equalization are now available, specifically for California, Iowa, New York, Ohio, and Oregon.

Partnership - Kentucky Cities

- Form 228-S and Form 228 now include the Account number, Business Activity, and add back for State and Local Taxes when input is present.
- Form 228-S now only includes guaranteed payments on Worksheet 1, Line 9.
- Worksheet > Lexington BOE > General Information now produces a Lexington BOE return.

Electronic Filing

Partnership, Corporation, and S Corporation - New York City

The schema version has reverted to the prior version per New York City.

Fiduciary

Tennessee returns with a balance due now default to April 15, 2016, for the direct debit date, unless a date is specified with the required banking entries.

State Approvals with Release 2015-3.0.1

The following state products are approved and are included with this release:

- **Corporation**. Louisiana Extensions
- **S Corporation**. Louisiana Extensions

State Approvals with Release 2015-3.0

The following state products are approved and were included with release 2015-3.0:

- **Partnership**. Rhode Island
- **Corporation**. North Carolina,
- **S Corporation**. North Carolina

Tax Product Updates

Individual (1040) Product Updates

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Federal

Custom Filing Instructions. Amended filing instructions for the spouse's separate state return now include the change in tax.

Form 1040. The taxable state and local income tax refund statement, 2014 column, Line 18, now uses $1,200 rather than $1,250 for the additional standard deduction for filers over 65 and/or blind.

Custom Filing Instructions. Amended filing instructions for the spouse's separate state return now include the change in tax.

Letters and Filing Instructions. When the option to produce credit card payment paragraphs is selected on General > Letters and Filing Instructions > General Letter > Credit card payment options for transmittal letter and custom filing instructions, letters and filing instructions for the states of Kentucky (estimate only), New York, and Rhode Island no longer include the requested paragraphs. Letters and filing instructions for the state of New Mexico now include the requested paragraphs.

Iowa

IA 6251. When one spouse has negative adjusted gross income, no more than 100% of tax preference items are allocated to the other spouse.

Maryland

Rounding of local poverty credit on Form 502, Line 30, was corrected.

Mississippi

Form MS8453 and transmittal letter show direct debit information only when direct debit is selected.

Ohio

Form IT BUS calculates bonus depreciation adjustments from K-1's.

The Ohio Filing Status Comparison (FSC) includes changes to the 2015 return.

Ohio Electronic Filing

Form IT BUS includes zeros on Lines 13 and 14 as required by Ohio Department of Taxation.

Pennsylvania - Pennsylvania Cities

CLGS-32-3 1st Voucher due date is 04/15/2016. The Pennsylvania Tax Reform Code has a provision that the PA-40 Income Tax return must be due the same date as the Federal 1040 return. However, no similar provision exists for the Estimated Income Tax and Emancipation Day is not a recognized holiday in Pennsylvania. Pennsylvania Cities follows the due dates of the Pennsylvania return and estimates.

S Corporation (1120S) Product Updates

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New Mexico

The letter and instructions for Form RPD-41367 will now reflect mailing instructions by default unless the form includes more than 50 filers.

Fiduciary (1041) Product Updates

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Federal

Transmittal Letter processing instructions for the electronic filing signature authorization only produces for states that have an authorization form independent of IRS Forms 8453-FE or 8879-F.

Alabama

The total of Schedule K-1, Line G, Beneficiary's percentage of allocated income, now equals 100%.

Indiana

Schedule CR now displays the tax rate of 3.3% that is used for calculations.

Schedule K-1, Line 17, Other information, now only includes Tax Exempt income included in Line 14 of the IRS Schedule K-1.

Schedule K-1, Line 18, Total pro rata distributions, no longer includes Line 3, Qualified dividends.

Estate & Gift (706/709) Product Updates

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Federal

Additional updates were made for Form 8971.

Issues Addressed

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

Tax

Letters. *Print Letters in the Government Copy* is now consistently working for 1040 returns when the reduced government copy is used. (142315)

CCH® eSign. You can now eSign Virginia and Kentucky married filing separate returns. (139595)