

CCH Access™ Tax
2016-2.1 Release Notes

January 15, 2017



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At the Center of the Firm in Motion

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Contact and Support Information

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Product information can be accessed by visiting Customer Support online: [CCH Access Product Support](#).

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 Access™ 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 Access Tax releases: [Release Notes](#).

Visit the [Application Status](#) Web page to view the current status of our CCH Access 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, Pro Forma/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 2016-2.1

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2016 Tax Updates

Corporation Extension Due Date

The Corporation extension due date for calendar year 2016 returns is September 15, 2017. An earlier CCH Software News stated the due date as October 15.

Corporation and S Corporation

The Update Pro Forma Feature is available to resolve an issue with Electronic Filing > Electronic Signature Roll forward when the option to "Clear electronic filing overrides" is selected in the return configuration set.

The following fields were being dropped in Roll Forward and will now be included in the 2016 return, if you accept the change upon opening any affected return:

- Taxpayer self-selected PIN
- PIN authorization indicator
- Signing officer's name

Partnership, S Corporation, Exempt Organization

Reports of Foreign Bank and Financial Accounts (FBAR) for Foreign Financial Accounts. After confirmation with FINCEN that all return types should adhere to the April 18, 2017 due date for accounts maintained during calendar year 2016, the due dates for Partnership, S Corporation, and Exempt Organization will be updated to align with all other return types on Release 2016-2.2.

Partnership, Corporation, S Corporation, Fiduciary

Form 7004, Application for Automatic Extension of Time to File Certain Business Income Tax, Information and Other Returns, is a preliminary draft for this release. The Internal Revenue Service has not yet released a final draft of the form. For electronically filed returns, you will not be able to export Form 7004. Beginning with Release 2016-2.2, if the final draft is not available, Form 7004 will be available for electronic filing, in spite of its preliminary status.

Estate & Gift

Form 8971. Transmittal letter and filing instructions are available.

2016 Electronic Filing

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

Individual

Federal
FBAR


Idaho
Kansas

New York 204LL
New York City

Federal 2350	Kentucky	New York City Extension
Federal 4868	Maine	North Dakota
Arkansas	Maryland	Ohio
Arizona	Maryland Extension	Oklahoma
Arizona Extension	Michigan	Oregon
Colorado	Michigan - Detroit	Pennsylvania
Connecticut	Missouri	Pennsylvania Extension
Connecticut Extension	Montana	Rhode Island
District of Columbia	New Jersey	South Carolina
District of Columbia Extension	New Jersey Extension	Utah
Delaware	New York Extension	Wisconsin

Partnership

Federal	Kentucky	North Dakota
FBAR	Kentucky Extension	Oklahoma
Arkansas	Maryland	Oregon
Arkansas Composite	Maryland Extension	Oregon Composite
California	New Jersey	Pennsylvania
California Extension	New Jersey Extension	Virginia
Colorado	New Jersey Estimates	Wisconsin
Iowa	New Jersey CBT	Wisconsin Composite
Kansas	New Jersey CBT Extension	

 **Note:** New York 204-LL and New York Extension will be available on Release 2016-2.2 on Sunday, January 22, 2017.

Corporation

California	Kentucky
California Form 199	Kentucky Extension
California Combined	Maryland Extension
Florida	New Jersey Extension
Florida Extension	North Dakota
Iowa	Pennsylvania
Iowa Consolidated	Pennsylvania Extension
Kansas	Virginia
Kansas Consolidated	Wisconsin

S Corporation

Arkansas	Maryland Extension
Arkansas Composite	New Jersey Extension
California	North Dakota

California Extension	Oregon Composite
Florida	Pennsylvania
Florida Extension	Pennsylvania RCT-101
Iowa	Virginia
Kansas	Wisconsin
Kentucky	Wisconsin Composite
Kentucky Extension	

Fiduciary

Arizona	Ohio
Arizona Extension	Oklahoma
Iowa	Oregon
Kansas	Utah
Minnesota	Utah Extension
Missouri	Virginia

Exempt Organization

California Virginia

Corporation, Fiduciary, Partnership, S Corporation

- **Officer ID.** State requirements for electronic filing of most state returns now stipulate the inclusion of an ID for the return signing officer. This ID is the social security number for the signing officer. States also allow for the federal employer identification number as an ID for the signing officer, if applicable.
- **Number of W-2's.** Federal and state requirements for electronically filing returns require the number of W-2 's associated with any deduction for salaries and wages to be included for electronic filing purposes.

The following states do not require the signing officer ID or the number of W-2's:

California Florida Michigan Texas

Tax Product Updates

Individual (1040) Product Updates

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Ohio

S Corporation wages linked with an activity number flow to Form IT-BUS, Line 5, for shareholders with percentage of stock ownership over 20 percent.

Partnership (1065) Product Updates

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Oklahoma

Form 514, Part 4, Line 4. Diagnostic 44926 has been updated and will no longer issue incorrectly.

Corporation (1120) Product Updates

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Federal

IRS tests have been added to determine if Lines 18 through 21 of Schedule PH may be excluded from personal holding company income.

Power Pack

The return due date for calendar year insurance companies filing Forms 1120-PC / 1120-L has been updated to April 18, 2017, in accordance with Internal Revenue Code 6072.

S Corporation (1120S) Product Updates

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California

Form 588, 2017 Nonresident Withholding Waiver Request, is now available for filing. Nonresident payees who qualify can use Form 588 to get a waiver from seven (7) percent withholding based generally on the shareholder's California tax filing history, such as filing a group nonresident return. The S Corporation keeps a copy of the determination letter for their records. The S Corporation must submit the completed form at least 21 business days before the payment to allow the California Franchise Tax Board time to process the request. The year of the form must match the payment date of distributions to shareholders.

Louisiana

CIFT-620, Schedule E, Line 7, and Schedule F, Line 3b, now include federal-only interest.

Estate & Gift (706/709) Product Updates

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Minnesota

The following form is updated for revisions posted by Minnesota for the change in the 2017 late payment interest rate: Form M706

Exempt Organization (990) Product Updates

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Federal

The representative address on Line 2 will only display the state code once when the signer address has been entered in the return configuration set and the signor number is used to prepare the form.