

CCH Access™ Tax  
2016-2.3 Release Notes

January 29, 2017



**CCH Access™**  
*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 2016-2.3

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### Tax Updates

#### Individual, Partnership, Corporation, S Corporation, Fiduciary

##### Minnesota

Updates are available related to new legislation passed to bring Minnesota into conformity with several federal tax provisions.

##### Individual

The following product is available on this release:

Tax Projector

#### Extension Worksheet - Partnership, Corporation, S Corporation, Tax Exempt

We have added the extension letter/filing instruction options to the Extension worksheet. This is in addition to the current location in Options and will allow users to quickly select and verify these options without navigating back to the Options Worksheet.

### Electronic Filing

#### Reminders Regarding New Electronic Filing Requirements for Tax Year 2016

##### Individual

Driver's license/state identification information will now be required for Ohio. ID entries or an affirmative selection of "No ID" will be required to electronically file. Additionally, a diagnostic will issue for Mississippi that the "No Identification" option for driver's license/state ID should only be used if no identification exists. We will continue to update our logic as taxing authorities issue guidance for this area.

##### Partnership, Corporation, S Corporation, Fiduciary, Exempt Organization

- **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.** State requirements for electronically filing returns require the number of W-2s associated with any deduction for salaries and wages to be included for electronic filing purposes. All Fiduciary returns, Federal, California, Florida, Michigan, and Texas returns are not requiring this information and can be electronically filed without the number of W-2s present.



**Notes:**

- If this is not provided, your return will not qualify for export.
- The following states do not require the signing officer ID or the number of W-2's:
  - ◆ California
  - ◆ Florida
  - ◆ Michigan
  - ◆ Texas

## Approved Products Available on this Release

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

### Individual

California Extension	Minnesota Property Tax	Tennessee FAE 183
California LLC	New Hampshire	Tennessee LLC
Georgia	New Mexico	Tennessee LLC Extension
Indiana	North Carolina	Vermont Extension
Massachusetts	North Carolina Extension	West Virginia
Massachusetts Extension	Philadelphia NPT/BIRT	
Minnesota	Philadelphia School District	

### Partnership

Idaho	New Hampshire DP-10	Philadelphia
Michigan	New York 204-LL	
Minnesota	Pennsylvania Extension	

### Corporation

Connecticut Extension	Massachusetts Extension	Minnesota Consolidated
Idaho	Michigan	Montana Consolidated
Idaho Combined	Michigan Consolidated	North Dakota Consolidated
Massachusetts	Minnesota	Philadelphia

### S Corporation

Idaho	Minnesota	Pennsylvania Extension
Massachusetts	New York City	Philadelphia
Massachusetts Extension	New York City Extension	
Michigan	New York City Estimates	

## Fiduciary

Alabama	Idaho	Mississippi
Arkansas	Massachusetts	New York
California Extension	Massachusetts 2G	New York Extension
Delaware	Massachusetts Extension	

## Tax Product Updates

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### Individual (1040) Product Updates

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#### Ohio Electronic Filing

If paid preparer information is suppressed on Forms IT 1040 and SD 100, the "Authorize to contact" question will always be blank to allow electronically filing for self-prepared returns.

#### Pennsylvania

Other Reduction Adjustments entries carry to Schedule A, Line 8.

PA-40ES print order of vouchers is voucher 1 through voucher 4.

#### Tennessee

The extended due date for INC 250 requested by filing Form INC 251 is October 16, 2017.

## Partnership (1065) Product Updates

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### Federal

The personal portion of rental expenses reported on Schedule M-1, Line 4a, is now automatically reduced by state/city income taxes shown separately on the supporting statement for Schedule M-1, Line 4a.

## Corporation (1120) Product Updates

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### Federal

Officers Compensation overrides for Cost of Goods Sold will now override when entries are made in the COGS 8916-A section.

### Oklahoma Electronic Filing

Form 512, Line 1. Diagnostic 42948, will no longer issue when taxable income is negative.

## S Corporation (1120S) Product Updates

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### Federal

Schedule K-1 will now show on Print Preview in the accountant's copy when an individual shareholder's K-1 transmittal letter is suppressed.

### Hawaii

The nonresident N-4 withholding rate changed from .11 to .0825.

### North Carolina

Form CD-401S, Schedule C, Line 1, Total Assets, no longer includes the deduction for accumulated depreciation, depletion, and amortization, as this is deducted on Line 5.

### Ohio

Diagnostic 39774 no longer issues when Form IT-4708 is not present in the return.

## Estate & Gift (706/709) Product Updates

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### Federal

Form 706, Schedule M, Line 5a, calculates correctly when the only property passing to the surviving spouse is nonresiduary property.

## Exempt Organization (990) Product Updates

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### New Jersey

New Jersey letters and forms now reflect the mandated on-line filing requirement.

### New York

Form TR-573-CT will only generate when Form CT-13 is present in the return and electronic filing is not requested.