

CCH Access™ Tax
2016-2.5 Release Notes

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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 2016-2.5

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Tax Updates

Extension Worksheet

We added the extension letter/filing instruction option to the Extension worksheet for the following return types:

- Partnership
- Corporation
- S Corporation
- Exempt Organization

This is in addition to the current location in the Letters and Filing Instructions worksheet. The new location allows you to quickly select and verify this setting without navigating back to the Letters and Filing Instructions worksheet.

Electronic Filing

Approved Products Available on this Release

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

Partnership

Alabama	Georgia	Tennessee
Alabama Composite	Maine	Tennessee Estimates
Connecticut	Nebraska	Tennessee Extension
Connecticut Extension	North Carolina	Tennessee INC 250
Delaware	North Carolina Extension	Tennessee INC 251 Extension
District of Columbia	South Carolina	Vermont

Corporation

Connecticut	New York CT-300	Tennessee Estimates
Connecticut Estimates	North Carolina	Tennessee Extension
Delaware	North Carolina Extension	Utah Consolidated
Georgia	Oregon Consolidated	Vermont Extension
Georgia Consolidated	South Carolina	Wisconsin Combined
Maine	South Carolina Consolidated	
Maine Consolidated	Tennessee	

S Corporation

Alabama	Maine	Tennessee
Alabama Composite	Montana	Tennessee Estimates
Connecticut	New York CT-300	Tennessee Extension
Connecticut Extension	North Carolina	Vermont Extension
Delaware	North Carolina Extension	
Georgia	South Carolina	

Fiduciary

South Carolina

Tax Product Updates

Individual (1040) Product Updates

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Federal

Filing Status Comparison. An entry for itemized receipts on Itemized Deductions > State and Local Sales Tax Information splits for the filing status comparison calculation.

Iowa

Form 4562A will produce when there are federal and Iowa section 179 differences.

Maine Electronic Filing

When the worksheet for Pension Income Deduction, Lines 7 for Taxpayer and Spouse total, does not equal Schedule 1, Line 2d, the disqualifying electronic filing diagnostic 42754 is issued.

Ohio - Ohio Cities

The mailing address for the Village of Anna uses ZIP code 45302-0140.

Oregon

Oregon Form OR-40, Lines 16 and 17, and Forms OR-40-N and OR-40-P, Lines 37 and 38, now show itemized deductions and Oregon tax payments are included respectively when itemized deductions are comprised exclusively of Oregon tax payments.

Schedules OR-ASC and OR-ASC-NP now limit:

- The Oregon 529 College Savings Plan contributions subtraction amount in aggregate with the Oregon ABLE account contributions subtraction amount to \$4,620 for jointly filed returns (\$2,310 for all other filing statuses).
- The Oregon ABLE account contributions subtraction amount in aggregate with the Oregon 529 College Savings Plan contributions subtraction amount to \$4,620 for jointly filed returns (\$2,310 for all other filing statuses).

Pennsylvania

Depreciation recapture from the sale of home is no longer reported on Schedule D, Line 1.

Pennsylvania - Pennsylvania Cities

Transmittal letter and filing instructions pull the estimate address Line 1 when entered in the return configuration set using generic P01 - P99 codes.

Partnership (1065) Product Updates

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Federal

Drill-down navigation from Form 8903 to input and reconciliation was added.

California

Form 588, business name, will be one character shorter to prevent wrapping to the next entry. Entries will not be skipped.

Delaware

Form 1065 K-1. The attention line has been reinstated to be the government form entry so the text can be varied between partners.

New Jersey

Form NJ1065, Page 2, Line 22c, Column B, now equals Line 22c, Column A multiplied by the apportionment factor on Line 16b, unless a substitute allocation method is selected.

Oregon - Multnomah County

The letters are updated and paragraph 32908 will no longer be included.

South Carolina

Diagnostic 24310 was updated for current specifications and file numbers no longer have to begin with "72."

Corporation (1120) Product Updates

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Federal

Drill-down navigation from Form 8903 to input and reconciliation was added.

The Federal transmittal letter and filing instructions now reflect the following:

- Correct extended due dates for short year returns with a tax year end date of 06/30/2016.
- Correct fax number for filing Form 2553 with the Ogden Service Center.
- Correct due date per the IRS instructions for Form 2553.

Rhode Island

The Net Operating Loss (NOL) on Form RI-1120C Schedule B, Line 1a, is limited to the lesser of the Rhode Island or Federal NOL.

Texas

Fiscal Form 05-102 Affiliates will now display the principal office and place when using the automated feature for Texas Affiliates Combined Reports.

S Corporation (1120S) Product Updates

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Federal

Drill-down navigation from Form 8903 to input and reconciliation was added.

Alabama

Schedule PTECK-1, Column E, is now calculated from Sch K-1, Line G, plus only positive amounts on Lines H, J, K, L, and M.

Illinois Electronic Filing

The entity physical address will only come from the taxpayer address or the General > Electronic Filing > Filing Security Information federal worksheet.

Oklahoma

The letters are updated when filing a combined franchise and income tax return.

Texas

The state depreciation detail reports no longer print in the accountant copy of the return.

Fiduciary (1041) Product Updates

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Federal

Form 4952. When Schedule C is an oil & gas activity with no material participation, interest expenses will be included on Form 4952, Line 1.

Form 7004. When the option to print the IRS Mailing Address on Federal Extension is used, the address will match what is reflected in the letters and filing instructions.

Roll forward. The amount of prior year tax that rolls forward for Georgia will be less all credits on GA 501, Line 9c.

The electronic filing transmittal letter will produce information related to automatic withdrawal of funds when banking information is input for states, as applicable.

Arizona

Form AZ 8879-F, the E-file Signature Authorization for Fiduciary returns, pulls the name of the Electronic Return Originator to Part 4. This name will be pulled from the return configuration set or Federal > Electronic Filing > Electronic Return Originator - Overrides > ERO contact name. The user can also opt to use Paid preparer override information as the ERO. This will use the Paid Preparer name on AZ 8879-F, Part 4.

Arizona Electronic Filing

Diagnostic 49947 is in response to a new business rule added for tax year 2016. In previous tax years, Form 141AZ, Line 16, for Arizona taxable income was allowed to be negative for electronic and paper filing. The new instructions for Form 141AZ state to enter a zero if the amount is negative. If Line 16 is negative, it will now show as 0.

New York

The IT-204-LL prints the date the business began.

New York - Electronic Filing

Transmittals for zero balance due extension reflect electronic filing information. The diagnostic showing approval for electronic filing will also issue.

Estate & Gift (706/709) Product Updates

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Federal

Form 709, Schedule A. If the last gift ends on the last line of a continuation sheet, it no longer creates a following blank continuation sheet.

Exempt Organization (990) Product Updates

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Electronic Filing

Form 8879-EO prints the current date as the default for the ERO signature date.