

CCH Access™ Tax
2016-3.0.1 Release Notes

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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 2016-3.0.1

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Tax Updates

Partnership

New York 2D Barcodes

There is an option that has been added to allow suppression of the NY Partnership 2D barcodes when a delay in print time is encountered. You can find the option on New York > General Information > Printing Options > Reserved. Check the “Reserved” box, which is Field 9 on that section. Recalculate the return. The 2D barcodes are suppressed and the return will print without any delay.

Electronic Filing

Partnership and S Corporation

Massachusetts

Form M-8453 CR, Nonresident Composite Return Tax Declaration for Electronic Filing, is available for processing.

Corporation and S Corporation

New Hampshire

Options for New Hampshire electronic filing are added to the General > Electronic Filing > State Electronic Filing Options worksheet.

Tax Product Updates

Individual (1040) Product Updates

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Arizona

Arizona capital gain subtraction worksheet, Line 4, includes installment sale income classified as 1231 if that gain is also considered long-term capital.

Oregon

Additions and subtractions with zero amounts in the federal and Oregon columns due to limitation calculations do not carry to Schedule OR-ASC-NP.

Amounts disallowed for subtraction codes 324 (Oregon 529 College Savings Plan deposit) and 360 (ABLE account deposit) due to contribution limitations carry to the 2017 carry over report as they are subject to a four year carryover provision.

Amounts entered as current year credits for carryforward credit codes 842 (Contribution of computers or scientific equipment for research), 848 (Lender's credit: energy conservation), and 851 (Alternative fuel vehicle fueling stations) are not included in the total credit on Schedules OR-ASC/OR-ASC-NP since current year credits are not awarded for these credit code.

Carryforward credit code 861, residential energy credit, flows to Schedule OR-ASC or OR-ASC-NP with prior year amounts only.

Entries for inactive modification codes 641, 643, and 647 no longer carry to Schedule OR-ASC/OR-ASC-NP.

Override entries for the special medical subtraction (subtraction code 351) are limited to zero on married filing jointly returns when the taxpayer and spouse are under 64 years of age.

Prior year amounts entered for carryforward credit code 847 (Employer scholarship) carry to Schedules OR-ASC/OR-ASC-NP.

PTE schedules include Section 1231 losses in Column C since they are treated as ordinary losses on non-passive entities.

The exemption credit on Forms OR-40-N and OR-40-P is multiplied by the Oregon percentage for single and married filing separately status returns.

The last four digits of the direct deposit/debit account number are referenced in the transmittal letters and filing instructions on the first calculation of a return.

Partnership (1065) Product Updates

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District of Columbia

The masking of the partner's and partnership's ID numbers on the K-1 Equivalent work as expected in the K-1 copy of the return.

Michigan

Form 807, Page 1. The print positions are updated for the preparer PTIN number and the Authorize to discuss check box.

Montana

Form ST-1 and Common State > Generic State Schedule K-1 Information > Generic Partner inputs recognize the input of a different entity type for the partners and reflect this on Schedule III.

The overrides for entity type codes from the State Schedule K-1 Information input now flow to Schedule III, Column B, when the partner numbers are not in sequential order.

North Carolina Electronic Filing

The electronic version of Form D-403, Part 3, Section B, Line 12, is updated for residents to no longer include the apportionment factor when apportionment data is not entered.

Corporation (1120) Product Updates

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Connecticut Combined

The CT 1120-CU continues to be developed and tested. This release includes corrections to Forms CT-1120CU, CT-1120CU-NI, CT-1120CU-MI, and CT-1120CU-MTB. This release also includes state mandated print position changes to Form CT-1120. Electronic filing for CT 1120-CU is also being developed and will begin the approval process.

S Corporation (1120S) Product Updates

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North Dakota Electronic Filing

Disqualifying diagnostics 49682, 49683, 49685, and 49686 no longer issue for Schedule II, Column (F), when there is a loss on Form 1120SN, Line 5.

South Carolina

The Form I-349 grid is updated.

West Virginia

The input worksheet for the Tax Return Questionnaire is accessible in the menu.