CCH Axcess™ Tax

2016-4.1 Release Notes

July 23, 2017

CCH Axcess™

At the Center of the Firm in Motion

Contact and Support Information

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Product information can be accessed by visiting Customer Support online: CCH Axcess 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 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, 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 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 2016-4.1

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Common Updates

Client Dashboard

Client notes in the Client Dashboard now include notes about contacts assigned to the selected client. These notes allow assignment and due dates, enabling you to follow-up on activities that are not specific to an active project or return.

Tax Updates

Attach PDF Files Stored in CCH Axcess™ Document

For tax years 2015 and higher, you can browse to a location in Document where a client's files are stored when attaching PDF files for electronic filing. PDF files that are downloaded from Document are saved in the tax return and not on your machine or device. You can view the PDFs any time you access the return.

Note: Document must be licensed and installed and you must have the necessary Document permissions.

Batch Purge Notes

The new Purge Notes job type in Batch Manager ensures that confidential or outdated information is removed from your returns. You can set filter criteria to select specific returns for batch purge notes processing. The system filters the list to show only returns with an associated Preparer, Review, or Missing Item return or field note and for clients who you have permission to edit.

Returns that are locked using the Prohibit Changes feature in Tax are also included in the list. Notes in these returns can be purged.

Issues Resolved

We have resolved the following issues on this release:

- **Missing bookmarks in the print PDF**. Bookmarks for statements now correctly appear in the PDF navigation tree.
- **Line 65**. Control information is now properly updating.
- **Deleting clients**. We have resolved the issue with attempting to delete clients that previously had returns.
- **Notes**.
  - We are no longer losing field Notes or Notes icons.
  - We have resolved the lag in opening field or return notes.
- **Entering statement lists**. Lists in statement paragraphs now format correctly when you press Enter or Return.
- **NY IT-201 Line H Dependent information**. Dependent Information was displaying and printing

DOB in MMDDYY format. This now correctly displays in MMDDYYYY format.

- **NY consolidated return exports**. We resolved an issue caused by the New York consolidated return export. You can now successfully export these return groups.

Partnership

A new option is available to provide a blank copy of Form 1065/1065-B when amending a return due to the need to file Form 8082, Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR). You will also be able to specify which partners' Schedule K-1s need to be included with the return. This option is available and can be activated on Fiduciary or Partnership Passthrough > Form 8082 - Administrative Adjustment Request > Amended Form 1065 return subject to the consolidated audit proceedings of IRS sections 6221 through 6234 (TEFRA) electronic filing option.

Estate and Gift

Final Connecticut forms are available for dates of death in 2017.

Electronic Filing

Electronic Filing Status System

After performing a Filter/Search you will notice a change in the number of returns visible in the result set shown. We have greatly reduced the space between each row to maximize the number you can view before scrolling.

Note: Each page's display limit remains at forty rows, but you are now able to see more rows before the need to scroll.

Tax Product Updates

Individual (1040) Product Updates

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Georgia

Late filing penalty now calculates from the extended due date when a return is extended.

Late filing penalty now calculates at 4.5% when the late payment penalty is also being assessed.

Pennsylvania

PA-40, Line 1a, includes the correct amount from Schedule W2S, Part B, when Form 8606 has taxable state amounts present in Column G.

Statement SBE will always be included with the printed copy of the Pennsylvania return when present.

Taxpayer or jointly filed PA-40ES vouchers display the correct primary SSN when the taxpayer is deceased on a jointly filed PA-40 return.

Tennessee

The interest rate charged on INC 250 and FAE 170 balances is 8% beginning July 1, 2017.

Partnership (1065) Product Updates

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Connecticut

Connecticut 1065 CT Schedule K-1, Part II, Line 13, no longer prints a blank statement when the override is used.

Massachusetts

Due dates have changed for 1065 returns with an original due date on or after 01/01/2018 to be 3 months and 15 days after the end of the tax year.

Corporation (1120) Product Updates

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Federal

State prior year AMT tax carryover information can now be entered in Credits > 8827 - Credit for Prior Year Minimum Tax > Prior Year Minimum Tax Carryover.

Alaska

When Federal Form 1120-C is filed, the return calculates using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Arizona

When Federal Form 1120-C is filed, the return calculates using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Connecticut

Zero amount overrides entered on lower level returns on Connecticut > Credits > Business Credits on CT-1120K are now included in the calculations on Schedule KU at the combined level.

Indiana

When Federal Form 1120-C is filed, the return calculates using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Massachusetts

Massachusetts due dates were changed for 1120 returns with an original due date on or after 01/01/2018 to be 4 months and 15 days after the end of the tax year.

Mississippi

When Federal Form 1120-C is filed, the return calculates using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

Montana

When Federal Form 1120-C is filed, the return calculates using the income and deduction amounts from Form 1120-C, Lines 25c through 27.

S Corporation (1120S) Product Updates

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Louisiana

Initial returns now have a minimum of $110 for the franchise tax on CIFT-620, instead of $10.

Massachusetts

Tax type in Form 355-ES, Estimate Vouchers, was updated in 355U, Unitary, returns to use "014."

Fiduciary (1041) Product Updates

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Federal

Grantor Letter. The Federal Grantor Letter presents qualified production information as the gross numbers entered.

Oklahoma

Form ESBT. The Tax rate was updated to 5.00% on Form ESBT.

Estate & Gift (706/709) Product Updates

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Federal

The Rev Proc 2017-34 portability election option, *Print Rev Proc 2017-34 message at top of page 1*, is available on Estate Tax > Elections and Options > Options.

Connecticut

The following final Connecticut forms are available for dates of death in 2017:

- Form CT-706 NT
- Form CT-706/709
- Form CT-706/709 EXT

Massachusetts

To override the answer to Form M-706, Page 2, Question 5, that carries from Federal Form 706, the *Decedent made transfer under section 2035, 2036, 2037 or 2038 - override* option is available on Massachusetts > Estate Tax > Basic Data.

Exempt Organization (990) Product Updates

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Federal

When Schedule A is being prepared for a supporting organization, as indicated by checking Line 12 on Part I, an entry can also be made to force the completion of the Public Support test on Part II to determine if any contributors meet the Special Rule on Schedule B. If the appropriate entry is made on the Schedule A worksheet > Support Schedules - Parts II and III > Code for public support test, the Public Support test on Schedule A, Part II is now completed.

Electronic Filing

Electronic Filing diagnostic 44248, indicating an invalid estimate date, is no longer issued.

Massachusetts

Massachusetts due dates were changed for corporate M-990T returns with an original due date on or after 01/01/2018 to be 4 months and 15 days after the end of the tax year.