

CCH Access™ Tax  
2017-2.6 Release Notes

February 18, 2018



**CCH Access™**  
*At the Center of the Firm in Motion*

<b>Contact and Support Information</b>	<b>2</b>
<b>Information in Tax Release Notes</b>	<b>3</b>
<b>Highlights for Release 2017-2.6</b>	<b>4</b>
Tax News .....	4
Tax Updates .....	4
Electronic Filing .....	4
<b>Tax Product Updates</b>	<b>6</b>
Individual (1040) Product Updates .....	6
Partnership (1065) Product Updates .....	7
Corporation (1120) Product Updates .....	9
S Corporation (1120S) Product Updates .....	10
Estate & Gift (706/709) Product Updates .....	11

## Contact and Support Information

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[Return to Table of Contents.](#)

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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[Return to Table of Contents.](#)

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 2017-2.6

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[Return to Table of Contents.](#)

### Tax News

#### Caution! Taxpayers Sending Masked Documents to Taxing Authorities

A number of agencies have received estimate and payment vouchers with masked Social Security Numbers. To ensure payments are correctly and timely processed, please advise taxpayers to submit the non-masked copies with their payments. Accountant and Taxpayer copies are masked. Only the Government copy includes the Social Security Numbers for tax filing.

### Tax Updates

#### Roll Forward

We have identified the following roll forward issues:

- **Individual - Iowa.** Iowa > Income/Deductions > Depreciation Accumulated Adjustment does not roll forward if the Depreciation and Amortization worksheet is not in the return.
- **S Corporation - Wisconsin.** Wisconsin Credits > Research Credits (Schedule R) > Carryover of unused research expense credit, Carryover of unused research facilities credit and carryover of super research and development credit were incorrectly rolled forward for S Corporation returns.

We will resolve this issue with Release 2016-5.6, scheduled for February 25, 2018.

Our Update Pro Forma feature will be available with Release 2017-2.6, which alleviates the need to re-roll forward the above issue.

### Electronic Filing

#### Approved Products Available on this Release

The following products are approved and available on this release:

##### Individual

Tennessee Form FAE-183

##### Partnership

Kentucky

Kentucky Extensions

## Corporation

Alabama Consolidated	Illinois Consolidated
District of Columbia Consolidated	Nebraska
Georgia Consolidated	Wisconsin Combined

## S Corporation

District of Columbia Consolidated

## Fiduciary

Ohio

## Tax Product Updates

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### Individual (1040) Product Updates

Return to [Table of Contents](#).

#### Illinois

Assets placed in service after September 27, 2017, and claiming 100% depreciation for federal do not show on IL-4562.

#### Oregon

Forms OR-40, OR-40-N, and OR-40-P now automatically calculate the increased Earned Income Tax Credit percentage (11% rather than 8%) when a dependent who is two years old or younger is present in the return.

#### Pennsylvania

Schedule F now uses Depreciation Totals.

## Partnership (1065) Product Updates

Return to [Table of Contents](#).

### Federal

**New Diagnostic.** A new warning diagnostic has been added to alert you when the tax year beginning date is not in the current year.

The filing instructions for Forms 8697, 8866, and 8922-B will print on the grid when "Use heading in 'prepared by' section for custom filing instructions" is selected.

The transmittal letter will now list Form DP-10 estimates.

When the option "Letters reflect paper filing instructions when electronic filing is disqualified" is selected, these documents will only reflect paper filing and caution diagnostic 26982 will only issue if the state is showing as disqualified on the ELF Report.

### Delaware

Transmittal letters and filing instructions will reflect the due date of 3 months and 15 days after the end of the tax year.

### Illinois

Form IL-1065, Step 7:

- Line 51 will not be zero when Line 47 is zero.
- Line 53 will equal Line 49 when Line 49 is less than zero.

### Massachusetts

The difference in federal and Massachusetts depreciation will now calculate properly when total depreciation amounts have been entered.

### New Hampshire

Form DP-10, Line 4 municipal interest, will no longer automatically issue Code 2. It will populate with Code 2 when the home state is New Hampshire and no entry has been made indicating another state or when the state code entered is New Hampshire on Income/Deductions > Interest > State.

### New Mexico Electronic Filing

An issue with filing the NM PTW-D was discovered and has been fixed with release version 2017-2.6.

### Ohio

IT/SD 2210-1140 and IT/SD 2210-4708 will now calculate a zero penalty if an exception is met.

IT/SD 2210 - 1140 will now use the correct dates for the 2nd and 3rd periods to calculate the penalty.

### Oregon

Schedule OR-K-1 will only require one calculation to populate when the entity type is changed from individual to grantor trust.

## Pennsylvania Electronic Filing

Pennsylvania extension letters will indicate electronic filing is requested and will no longer indicate where to mail the extension form.

## West Virginia

The due date for Form IT-140-NRC is updated to April 16th, 2018, from April 17th, 2018, due to Emancipation Day not being observed.



## Corporation (1120) Product Updates

[Return to Table of Contents.](#)

### Federal

**Contributions.** A new contribution type has been added to the 1120 system. Contribution Type "A" has been added to designate contributions subject to a 15% taxable income limit. The contribution type is entered on Income/Deductions > Charitable Contributions > Contribution Detail Not Carried to Form 8283.

**New Diagnostic.** A new warning diagnostic has been added to alert you when the tax year beginning date is not in the current year.

The extension letter will now show the correct ZIP code for extension letter and filing instructions' mailing addresses for corporations located in the following states:

- Georgia
- Illinois
- Kentucky
- Michigan
- Tennessee
- Wisconsin

### Massachusetts

The extension Form M-8736 for the income return for Clubs and Other organizations filing Form 3M has been replaced by Form M-990T-7004. Estimates for financial institutions filing Form 63 FI have been added. These filers should file their estimates with the new vouchers 63 FI-ES if they are not required to pay estimates on the Massachusetts website.

### Minnesota

M4 returns with a fiscal year ending June 30th or a short taxable year ending in June will show a September 15th due date in the letters, filing instructions, and return summary.

### New York

Changes have been made to the default computation of Form CT-300, Line 5 prior period overpayments used to offset mandatory First Installment (MFI) due. When current year prepayments exceed the current year tax balance, the program will apply current year estimated tax payments, less the current year tax balance. The amount applied to Line 5 remains overrideable.

## S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

### Federal

**New Diagnostic.** A new warning diagnostic has been added to alert you when the tax year beginning date is not in the current year.

### Fixed Assets Import

New York City input entries do not import to the Depreciation and Amortization (Form 4562) state column worksheet, unless there are differences between New York City and Federal.

### Georgia Electronic Filing

Georgia Form 8453-S will select the box "ERO is also the paid preparer" box, when applicable.

### Kentucky Cities

Louisville Form OL-S will now produce when requested without automatically selecting the option for having employees in Louisville.

### New Hampshire

The Form BET gross business receipts amount no longer includes rental income in the calculation twice.

### New York Electronic Filing

New York Diagnostic 44249 will not issue when multiple bank information is entered for a New York return and New York 204LL.

### Ohio

Compensation entered on Shareholder Information - State Specific > Shareholder State Information > Amount 2 field will no longer be included in Line 1 of IT 1140, Schedule B.

Form IT K-1 will print with the K-1 print package.

IT 1140, Page 4, investor 2, and IT 1140, Page 5, investor 3, will print the correct state code.

Overrides used to fill IT 1140, Schedule B, Line 2b, will now be included in the calculation of IT K-1 taxable income.

### Wisconsin

The Schedule 5K-1, Line 4, Column e amount now appears for nonresidents.

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

Return to [Table of Contents](#).

### Illinois

Late payment penalty and interest detail statements have been added to Illinois Form 700.