

CCH Access™ Tax
2017-2.7 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 2017-2.7

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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

ERO Signature, Forms 8879, IRS e-file Signature Authorization

We are adding new options regarding the "ERO's signature" line on Forms 8879, IRS e-file Signature Authorization, and state signature forms. Please read the following carefully to make sure you get the results you want.

- To print the ERO firm name as the electronic signature for returns, use the current following option: Return configuration sets > Electronic Filing Options > General > ERO signature options for Form 8879 > Print ERO firm name.
 - ◆ To print the firm name as the electronic signature for 1040 returns, but leave the signature line blank for non-1040 returns, also enter "ERObusSg1" in Return configuration sets > Miscellaneous Options > Reserved for future use 5.
- To print the ERO preparer as the electronic signature for 1040 returns or the firm name for non-1040 returns, use one of the current following options: Return configuration sets > Electronic Filing Options > General > ERO signature options for Form 8879 > Print ERO preparer (1040 only) or Print ERO firm name (all other systems).
 - ◆ To print the ERO preparer as the electronic signature for 1040 returns, but leave the signature line blank for non-1040 returns, also enter "ERObusSg2" in Return configuration sets > Miscellaneous Options > Reserved for future use 5.

Update Pro Forma

Our Update Pro Forma feature is available to remove Oregon > Credits > Surplus (Kicker) Credit > 2016 Oregon percent of federal AGI which alleviates the need to re-roll forward to resolve the issue.

Partnership, Corporation, and S Corporation

State Letters and Filing Instructions now reflect paper filing instructions when the electronically filed return is disqualified and the option "Letters reflect paper filing instructions when electronic filing is disqualified" is selected.

Electronic Filing

Approved Products Available on this Release

The following products are approved and available on this release:

Partnership

- Louisiana Composite
- Louisiana Extensions

Corporation

- Nebraska Consolidated

Batch Extensions Electronic Filing

Partnership

- Kentucky
- Louisiana Composite

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 8903. Form 8903 will print when only Line 23 is entered and the form is recalculated by Health Insurance Marketplace (Form 1095-A) input.

Form 8965. When there are multiple occurrences of IRS 1095-B and/or IRS 1095-C and the taxpayer or spouse is listed as a "Covered Individual" on both the IRS 1095-B and IRS 1095-C, but not on the first occurrence, the taxpayer and/or spouse are included on Form 8965, Worksheet A if they did not have coverage or an exemption for the full year.

Tax Projector. Projected Form 6251, Line 1, will calculate net of the qualified business income deduction amount on Projected Form 1040, Line 42.

Electronic Filing

Form 114. Only alphanumeric characters are included in the financial account number for electronically filed returns.

Indiana

Schedule IN-EIC, Section B, has a new input option to allow for proper filling of Lines B-1 and B-3. The input is on Basic Data > Dependents > State Use.

Kentucky

Schedule KW-2 rounds Kentucky wage income and withholding to the nearest dollar.

Michigan

Federal Schedule A now prints with the Michigan state government copy when present in the federal government copy.

MI Sch 1, Line 26, no longer calculates an amount when the taxpayer / spouse are younger than 72 years old.

Montana

Form 2, Page 6, Line 3, Column B, multiplies Line 2 by 7.5%. This will increase itemized deductions on Line 30, Column B, if applicable.

Montana Electronic Filing

Government Form MT2, Lines 20a and 20b, Column A, will fill with zero when Married filing separately on the same form is present and government Form MT2, Line 20b, Column B Social Security benefits is greater than zero.

New Hampshire

NH Interview Form NH4 now attaches correctly to subsequent interview forms when utilizing the Full Window or Split- Window forms tree view.

Ohio - Ohio Cities

RITA Form 37:

- Page 5, will not print when the entire return has been suppressed.
- Schedule J. Excluded income (such as tangible royalty income less than \$3000) will no longer be included in Schedule J amounts.
- Section B, Line 7a, will now be limited to the wages times the resident city's tax rate. Line 7a for non-resident wages will be limited to the wages times the difference of the resident city's tax rate minus the effective credit rate allowed for the wages. For electronic filing, this will prevent F37-SECTB-111, F37-SECTB-113, F37-SECTB-114, and F37-SECTB-012.

Rhode Island

Schedule M, Line 1v, does not calculate when the federal AGI is above the income threshold for the filing status indicated on the return.

Taxable social security benefits are calculated using the worksheet and will flow to Schedule M, Line 1u.

Tennessee

The preparer's PTIN will carry to INC 250 when present in Return Options > Preparer Information - Overrides Office Manager > Alternate preparer ID number (PTIN) or the return configuration set.

Partnership (1065) Product Updates

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Federal

The Pensions and IRAs amounts entered in Income/Deductions > Schedule K - Other Income / Deductions > Schedule K-1 Pensions and IRAs will be allocated correctly on the Partners' Schedules K-1 when ratio IDs are used to specially allocate the amount without affecting the Schedule K-1 other information and nondeductible expenses that are also being allocated using ratio IDs .

Arizona

140NR standard deduction amounts have been updated.

Online help has been updated.

Connecticut

CT-1065 SI, Part IV, will now mask all partners.

Kentucky Electronic filing

Form 8879 will now correctly check the box for "check if also paid preparer."

Michigan Electronic Filing

The composite estimates will no longer produce if threshold has not been met or electronic filing is not selected.

Minnesota

The Schedule KPC statement now reflects prior year section 179 / bonus depreciation information listed in the correct years.

New York

New York IT-204-IP partnership partners will now only be included once in the accountant and client copy when New York > General Information > Printing Options > Not print the IT-204-IP in the government copy of the return on nonresident partners in returns with no NY source income has been selected.

Ohio

All investors listed independently on the Partners > Partner Information - State Specific worksheet > Ohio section will now be included on the IT 4708 (if indicated as such), regardless of the order entered.

Guaranteed payments will no longer be included in the calculation of IT 1140, Schedule B, Line 1, for all investors and Line 5 for investors with less than 20% ownership.

Oklahoma

The Schedule K-1 equivalent will now correctly mask the partner's identifying number.

South Carolina

South Carolina will only produce estimate letters when the estimates are generated in the return.

Corporation (1120) Product Updates

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Federal

Eligible small business carryover for research and development credit from 2010 and 2011 years along with carryover from 2016 are now carried as such to Form 3800.

Louisiana

Schedule RC-P2, Part 2, Lines 7 and 8, will now fill when multiple Musical and Theatrical Production credits are entered.

South Carolina

SC 1120-TC will now display.

S Corporation (1120S) Product Updates

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Federal

Average annual wage limitation has been updated to \$26,200, as reflected on worksheet 6 of the form. Pennsylvania uses the straight-line method for assets when the state basis is different than the federal basis.

Arizona

Online help has been updated.

California

Form 3805Z, Worksheet II, Apportionment and related input are now available.

Illinois

Schedule 1299-A will produce if only the Research and Development credit was utilized.

Mississippi Electronic Filing

Form MS 84-155 now displays correct NOL for current year input and prevents negative and zero values from displaying. Diagnostic 49931 will only issue when incomplete input exist.

Montana

Inputting the PT-AGR year in the Shareholders > Shareholder Information (Detail) > Section 5 - State Information, Alphabetic 3 field will now fill the PT-AGR information on the Montana Schedule K-1 form without generating the actual Form PT-AGR for the shareholder.

Fiduciary (1041) Product Updates

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Nebraska

Form 1041N. The total Nebraska overpayment will now print on Line 28 and the overpayment on Line 28 credited to 2018 estimated income tax will print on Line 29.

New York

Transmittals and diagnostics for direct debit report will now use the date of 4/17/18 when entered as the withdrawal date for the return.

New York Electronic Filing

New York IT-204-LL transmittals will now show e-file instructions when electronic filing is selected, but disqualified unless otherwise indicated.

Estate & Gift (706/709) Product Updates

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Federal

The unit value in the last three rows of Form 706, Schedule B, continuation schedule now prints correctly.