

CCH Access™ Tax  
2017-3.0 Release Notes

March 4, 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 2017-3.0</b>	<b>4</b>
Tax News .....	4
Tax Updates .....	4
<b>Tax Product Updates</b>	<b>5</b>
Individual (1040) Product Updates .....	5
Partnership (1065) Product Updates .....	6
Corporation (1120) Product Updates .....	7
S Corporation (1120S) Product Updates .....	8
Fiduciary (1041) Product Updates .....	9
Estate & Gift (706/709) Product Updates .....	10

## 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 2017-3.0

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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

#### Update Pro Forma

Our Update Pro Forma feature is available to include the following:

- **Partnership.** Prior Year Tax from Wisconsin Form PW-1 for Wisconsin PW-U, Underpayment of Estimate Withholding Tax by Pass-Through Entities
- **Fiduciary.** Prior Year Tax for Oregon Surplus (Kicker) Credit purposes

#### Individual

**Federal.** The IRS has not released a final Form 1040-ES. The worksheet calculations were updated for known tax year 2018 legislation changes and we have changed the vouchers to indicate 2018. The vouchers continue to reflect "E" for early forms in the lower right corner of the form, but are fileable.

**Georgia.** Georgia Form 500 NOL, Net Operating Loss Adjustment, is now available to elect the NOL carryforward.

#### Fiduciary

Final Form 1041-ES is now available.

## Tax Product Updates

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### Individual (1040) Product Updates

Return to [Table of Contents](#).

#### Federal

Form 2210. Section 1294 deferred tax is included in the amount of the current year tax subject to penalty.

#### Kansas

Form 8960, Line 8 for Kansas, will calculate the correct amount.

#### Michigan - Michigan Cities

Dependent information on Page 2 of the CF 1040 will print on one line instead of wrapping in multiple lines.

#### Oregon

The Oregon surplus (kicker) credit is now included in the return summary and client letters.

The special Oregon medical subtraction is limited by the 7.5% FAGI threshold when itemizing deduction on the Oregon return but not the federal return.

#### Pennsylvania

Nonemployee compensation will not double on PA-40, Line 1a. PA-40, Line 1a, should always equal Schedule W2S, Column G Total.

PA-40, Line 13, should always equal the amount on Schedule W2S, Part B, Column H Total.

Schedule C, Line 13a, will not show amortization when IRC Section "197" is present on the Sch C - Business worksheet > Depreciation and Amortization (Form 4562) section > IRC Section field.

#### Vermont

Use Tax Worksheet will now calculate a minimum use tax of \$5.00 when the AGI is less than \$10,000.

## Partnership (1065) Product Updates

Return to [Table of Contents](#).

### Oregon

OR-TM letters and filing instructions will now include electronic filing information.

### Tennessee

The requested payment date entered on General > Basic Data > Direct Deposit/Electronic Funds Withdrawal > Withdrawal Date now applies the date to the electronic file.

The website in the transmittal letter and filings instructions now reflects the correct address for online electronic payments.

## Corporation (1120) Product Updates

Return to [Table of Contents](#).

### Federal

Book income (loss) now includes the excluded portion of Section 277 carryover when expenditures subject to the 90% test is used on Other Returns > 1120-H > 3-Deductions > Line 3.

Statement reference for Line 26 of Form 3115 will now print in an appropriate location on the form.

### New Hampshire

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

### New York City Electronic Filing

Diagnostic 43494 generates when a negative value is on NYC-2 Schedule C, Part 1, Lines 7, 9, or 11.

The direct debit report will now correctly reflect the due date of 3/15/18.

### Tennessee

The Direct Debit/Deposit report now applies the correct due dates for Tennessee estimated tax payments when the due date falls on a weekend.

## S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

### California

Form 3539, Payment for Automatic Extension, now contains the amount requested separately per state override input, when the "X to produce all first state extensions" option is selected.

### Colorado

Form DR 158-N will now produce when requested on Extensions > State / City Extension > Tentative Tax and there is no balance due in the return.

### Louisiana

Form CIFT-620, Page 3, will correctly print the preparer's name.

### Mississippi

Form MS 84-125, Line 2 (Payroll Factor), will now include Officers Compensation input for MS and Everywhere.

### Montana

The field for the Montana Secretary of State ID has been lengthened to allow a total of nine characters.

### Wisconsin

Wisconsin Schedule 5K-1, Line 6h amount can now be specially allocated when special allocation codes 53987 and 53988 are used.



## Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

### Pennsylvania

Schedules RK-1/NRK-1. The Federal identification number on top of the form is entirely masked when the option to mask is selected.

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

Return to [Table of Contents](#).

### New York

Late payment penalty and interest detail statements have been added to Form ET-706.