

CCH Access™ Tax
2017-3.2 Release Notes

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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 2017-3.2

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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 SSNs. 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 SSNs for tax filing.

Tax Updates

Federal. The IRS has released a final Form 1040-ES. We have updated our worksheet calculations as needed. We also updated the due dates for the first, third, and fourth vouchers on the OCR version of the form.

Electronic Filing

Approved Products Available on this Release

The following product is approved and available on this release:

Corporation

West Virginia Consolidated

Tax Product Updates

Individual (1040) Product Updates

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Federal

Forms 6765 and 3800. A non-passive entity with a limitation on the current year credit will see the unused amount of the credit appear on the Form 3800 carryover report.

IRA Worksheet. Miscellaneous income attached to a Schedule C, Schedule F, or Schedule E entity is not used in calculating earned income for IRA Worksheet purposes.

Section 179 carryover is deleted from the depreciation detail report when the Section 179 input is deleted.

Summary 4562, Line 11, does not include the Schedule C income when the Schedule C is marked as no material participation.

The 4835 depreciation detail report prints in the government copy when applicable.

First Extensions

Stand-Alone Extensions. OHC RITA stand-alone extensions will print tax year 2018 on RITA Form 32-EXT, Section 3.

New York

Form IT-203, Line 60a, is included in refundable credits shown on the Return Summary.

Forms IT-214 and NYC-208 household income can be adjusted using Federal AGI - adjustment.

Ohio

Extension letters indicate to mail the extension only if a voucher is present.

Ohio - Ohio Cities

RITA Form 37. When the resident city is the only city with Schedule J income, Worksheet L will produce. This will allow the total income on Worksheet L to flow to Worksheet R to determine the total withholding that can appear on Page 2, Section B, Line 7b.

Partnership (1065) Product Updates

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Federal

Beginning and ending tax year dates will now print on Form 8813 when the return is a fiscal year or short year return.

The extension letter and filing instructions for state extension classified as Other type of return will reflect automatic withdrawal of the balance due with the extension, when appropriate.

Iowa

Form 133, Line 6, now calculates when Line 1 equals 0.

Kentucky Cities

The Lexington 228 ENP form will now generate and print when Form OL-S is in the return.

Maine

Schedule K-1 Equivalent, Line 29 statement will now correctly list amounts from the Federal K-1, Line 13.

Ohio

An option has been added to the Federal Common State/City > Generic State Schedule K-1 Information > Generic State Partner Information Input (Detail) > State Use field, which will allow the investor ownership percentage to be changed on the IT 1140, Schedule E, Investor Information and the IT 4708, Schedule VI, Investor Information.

Rhode Island

The due date for Single Member Limited Liability Companies (SMLLCs) will reflect March 15 when the single member is a passthrough entity.

Corporation (1120) Product Updates

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Illinois

A diagnostic message has been added if the apportionment type box on IL-1120, Step 1, Line G, is checked but Line 23A is also checked, indicating that the return has no apportionment.

Kansas

Federal statements are not included in the accountant and client copies of the Kansas return.

Massachusetts

A unitary financial group will now automatically also check "Financial Organization" on Forms 355U and U-MSI if they include a financial elimination company.

New York City Electronic Filing

NYC-579-COR will now pull the ERO firm name on Part A when entered.

Utah Electronic Filing

Diagnostic 56781 will no longer produce with a foreign preparer.

S Corporation (1120S) Product Updates

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Delaware

The Form 1100S due date has changed to the 15th day of the 3rd month.

Kentucky

The extension filing instructions for nonresident withholding and composite returns will now reflect the correct filing address.

Kentucky Cities

A copy of the federal return will now print with the applicable Kentucky cities return.

Board of Education's Form OL-S, Line 13, will now calculate correctly when an overpayment is present.

Maryland

Form 510C Schedule A, Columns C and D, will appear as zero when the ratio of nonresident partner income to total income is zero.

Mississippi

Mississippi extension Form 83-180 will populate amounts entered for tentative/franchise tax when the option to generate all state first extensions is selected.

Ohio

Section 179 will no longer be included in income for IT 1140 investors if there is an entry in Ohio > Other Composite > Form IT 4708 Shareholder Information > Shareholder number.

Vermont Electronic Filing

Optional PDF attachments will now export correctly.

Fiduciary (1041) Product Updates

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Federal

Schedule K-1. Complex returns with DNI less than accounting income will calculate the ordinary income percentage using DNI for foreign tax and state adjustments.

The resident letter will use the correct percentage for a Massachusetts resident.

The resident state letter for Massachusetts, New Jersey, or Pennsylvania will report taxable income if there is zero distributions at the federal level. If there are no entries for distributions (except in the case of a simple or final trust), no taxable income will be calculated for the state.

New Jersey

Tax-exempt dividends will now flow to the New Jersey K-1 for grantor and custodial trusts.

New York

The IT-205 will mark the box for the paper check refund if an IT-205-C is in the return and a refund is required without any bank information in the return.

Estate & Gift (706/709) Product Updates

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Illinois

Form 700-EXT. Balance for which the extension of time to pay is sought can be overridden using Federal > Extensions > Estate Tax Extension > Additional State Extension Information > Balance for which extension of time to pay is sought.