

CCH Access™ Tax
2017-5.2 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 open a Support case or chat with a representative 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, 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 2017-5.2

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Tax Updates

Individual

Roll Forward. A New Hampshire issue that prevented roll forward completing for certain returns is resolved.

Organizer. The question regarding total mortgage balances on Page 3 of the Questions pages reflects \$750,000.

Corporation and S Corporation

Texas. The 2019 Franchise Tax Report Forms are now available for processing. Electronic filing of the 2019 reports is not available at this time and will be included on a future release.

Philadelphia. 2018 Forms BIRT and BIRT-EZ are now available. We are awaiting approval for these forms from the city of Philadelphia.

S Corporation

Ohio. Forms IT 4708, IT 4708 ES, Universal Payment Coupon, and Form IT/SD 2210, fiscal year updates, are now available. We are awaiting approval for these forms from the state of Ohio.

Estate & Gift

Final Forms 706 for dates of death in 2018 are available for federal filings.

Electronic Filing

Partnership, Corporation, S Corporation, and Tax Exempt

California. Electronically filed extensions must be recalculated and resubmitted on the latest schema version made available on this release.

Tax Product Updates

Individual (1040) Product Updates

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Organizer

The question regarding total mortgage balances on page 3 of the questions pages uses an amount of \$750,000 to reflect law changes contained in the Tax Cuts and Jobs Act. On releases prior to Release 2017-5.2, Questions, Page 3, can be customized to update the amount from \$1,000,000 to \$750,000 using the following steps:

1. From Batch Manager, click the **Letters** icon on the ribbon.
2. After Correspondence Manager opens, select the **2017** tax year and the **Individual** return type.
3. Expand **Questions, Page 1 of 4, select Organizer_Questions_Standard_1**, and then select **Edit** (or double-click on Organizer_Questions_Standard_1).
4. Make the desired changes and select **Save As**. After making any desired adjustments to the template name, click **Save**.
5. In the Letter Template Library, right-click **Organizer_Questions_Standard_1** and select **Enable Letter Template**. Clear all of the return configuration sets for which the standard questions should NOT print.
6. In the Letter Template Library, right-click the customized questions template and select **Enable Letter Template**. Select all of the return configuration sets for which the customized questions should print.



Note: No further edits are necessary to customize the organizer for the customized templates.

Vermont

When the election is made in the return configuration sets to allow the state to contact the preparer, it is now being reflected in the electronic file. Preparers will need to send a copy of the signed and authorized return if they need to discuss the return in question with the state.

Partnership (1065) Product Updates

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Federal

State amended filing instructions will not reflect an overpayment being credited unless that situation is present in the return.

Corporation (1120) Product Updates

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Federal

A return with a KS NOL carryforward will no longer prevent other NOL carryovers from rolling forward into 2018.

Texas

The 2019 Franchise Tax Report Forms are now available for processing. Electronic filing of the 2019 reports are not available at this time and will be included on a future release.

Estate & Gift (706/709) Product Updates

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Federal

The following final forms are available for dates of death in 2018:

- Form 706
- Schedule A
- Schedule A-1
- Schedule B
- Schedule C
- Schedule D
- Schedule E
- Schedule F
- Schedule G/H
- Schedule I
- Schedule J
- Schedule K
- Schedule L
- Schedule M
- Schedule O
- Schedule P/Q
- Schedule R
- Schedule R-1
- Schedule U
- Schedule PC