

CCH Access™ Tax
2018-2.5 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 2018-2.5

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2018 Tax Updates

Release 2018-2.5 Highlights of Tax Reform Changes

New calculations available for review; forms not ready for general use:


- Qualified Business Income Deduction (QBID) - new, final regulations received
- Form 8990, Limitation on Business Interest Expense IRC 163(j) - currently available as a library form only in Individual and Fiduciary
- Form 8994, Employer Credit for Paid Family and Medical Leave - Individual
- Form 965 and accompanying schedules

Corporation, S Corporation, Partnership

A new feature has been added to automatically change real property assets to ADS method and life when an entity opts out of IRC Section 163(j). This feature will be available on a future release for Individual and Fiduciary.

Paper Batch Extension Program - Individual, Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization

The Batch Extension program is now available for processing multiple extensions. Extensions are processed using Batch Manager > New Job > Print > First Extensions and/or Second Extensions.

 **Note:** All systems - District of Columbia requires confirmation of the accuracy of prior year (rolled forward) data.

2018 Electronic Filing Updates

Approved Products Available on this Release

The following federal and state products are approved and available on this release:

Individual

Arizona	Kentucky	Oklahoma
Arizona Extension	Minnesota	Philadelphia Form S-1
California Form 568	Minnesota Extension	Philadelphia NPT/BIRT
California Form 568 Extension	Minnesota Form MN PR	Tennessee Form FAE 170
Connecticut	Montana	Tennessee Form FAE 173
Connecticut Extension	North Carolina	Tennessee Form FAE 183
Indiana	North Carolina Extension	Virginia

Corporation

Alabama CPT	Louisiana	Minnesota Estimates
Alaska	Louisiana Extension	New York Combined
Alaska Consolidated	Michigan	Philadelphia
Illinois Consolidated	Minnesota	Wisconsin
Kentucky Consolidated	Minnesota Consolidated	Wisconsin Estimates

S Corporation

Louisiana	New York City	Ohio Composite
Louisiana Extension	New York City Estimates	Philadelphia
Michigan	New York City Extension	

Partnership

Alabama PPT	New York City	Ohio Composite
Michigan	New York City Extension	Philadelphia

Fiduciary

Alabama
Virginia

Batch Electronic Filing of Extensions

Batch electronic filing of extensions is available on this release for the taxing authorities listed below. To process your e-file extensions, go to Batch Manager > New Job > Electronic Filing > Extensions.

Please remember the security requirements for electronically filing extensions. You must enter this information in the return prior to running batch e-file of extensions. Without this information, we will not process the extension.

This information is:

- **1040 returns - New York.** New York requires an affirmative response regarding a driver's license, a state ID, or No Identification. If an identification is not available, this must be indicated.
- **All systems - District of Columbia.** Requires confirmation of the accuracy of prior year (rolled forward) data.

Individual

Federal	Arkansas	New Jersey
Arizona	Connecticut	New York

Corporation

Federal	Louisiana	North Carolina
Arkansas	Maryland	Pennsylvania
Kentucky	New York	Texas

S Corporation

Federal
Arkansas
Connecticut
Florida

Kentucky
Louisiana
Maryland
New York

New York City
North Carolina
Pennsylvania
Texas

Partnership

Federal
Arkansas
Connecticut

Kentucky
Maryland
New Jersey

New York
North Carolina
Texas

Tax Exempt

Federal

New York

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 1116. On the carryover worksheet, Foreign branch income category foreign tax credit carryover amounts calculate.

Form 3520. Part I, Lines 5a, 5b and 5c print "Same as lines 1a, 1b and 1c" only when 3520, Page 1, Box (a) is checked and no entries are made for the name, address and/or identification number on the 3520 - Return to Report Transactions with Foreign Trusts > Part I Information > Name, address and identification number fields.

Massachusetts

Schedule CB AGI limit is updated to allow the Senior Circuit Breaker credit to flow to the return.

North Carolina

QBID will be excluded on Schedule S, Line 13.

Partnership (1065) Product Updates

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Federal

The Income from Passthroughs Statement will correctly reflect the Section 199A items when California is present in the return.

Arkansas

Schedule K-1, Lines 2a and 2b will reflect the partners' share of the amount on the AR Schedule K.

Connecticut

Form IT-1065/1120SI will no longer include other states' input for estimates.

Kentucky - Kentucky Cities

Lexington Form OL-S. Lexington input for "Amount paid for minimum credit" will now carry to Line 12 of Form OL-S when this return is requested.

Louisiana

IT-565, Schedule O, Line 12, Columns 2 and 4 will populate with the end of year amounts for Buildings, Machinery, and Equipment.

Maine Electronic Filing

Form 941P-ME, Maine Pass-Through entity withholding, has updated its software ID to match the Maine Revenue Services specifications.

Massachusetts Electronic Filing

New business rules were released regarding Schedule CMS. Schedule CMS, Part 2 should always be blank for 1065. Schedule CMS, Part 4 should always be blank for 1065. Credits can no longer be shown as taken on Schedule CMS Parts 1 and 3 for a 1065, but all credits will still carry to Schedule 3K-1 to be distributed to individual owners and claimed on the Individual return.

Montana

Montana distribution to Schedules K-1 for resident partners will include non-Montana source income.

Nebraska

Schedule I will not print when there is no input for the apportionment factors.

Updated the print of partners' percentages on subsequent pages of Schedule II.

New York

The preparer's NYTPRIN or NYTPRIN exclusion code will now fill the paid preparer section of the New York government forms from input in the following order:

1. NYTPRIN from New York > General Information > Basic Data > Preparer's NYTPRIN - override.
2. NYTPRIN exclusion code from New York > General Information > Basic Data > NYTPRIN exclusion code - override.
3. Staff Manager > Staff Profile > Tax > Signer > NYS preparer ID.
4. Staff Manager > Staff Profile > Tax > Signer > NYS preparer ID exclusion code.
5. Configure > Return Configuration Sets > Signature Block > NYS Preparer ID.
6. Configure > Return Configuration Sets > Signature Block > NYS preparer ID exclusion code.

Ohio

Form IT 1140 estimate payment vouchers will no longer be mentioned in the transmittal letter or filing instructions when the option to prevent the estimate is entered on the Payments/Penalties/Estimates > Estimates and Application of Overpayment > State Estimate Preparation and Application of Overpayment.

Oklahoma

Form 500-B for Nonresident Partner Income tax Withheld for members present on the composite return is now available for electronic filing.

Oregon

Schedule OR-K-1 and OR-K-1 Equivalent footnotes information will update when the federal and state coding entered for the K-1 footnotes changes.

Texas

Section B and C of the Public Information Report/Ownership Information Report will now populate when the Public Information Report/Ownership Information Report name is longer than 40 characters.

The include all partners option for the Public Information Report/Ownership Information Report has been corrected so it will not exclude partners with less than 10% ownership.

Utah Electronic Filing

Diagnostic 51000 and 50741 will only issue when the extension is requested.

Wisconsin

Form 3, Line 13 will print 0% when Schedule 3K-1, Line I is 0% (when Form A-1 or Form A-2 are present in the return but there is no WI apportionment) and will default to 100% when Schedule 3K-1, Line I is 100% (when Form A-1 or Form A-2 are not in the return).

Corporation (1120) Product Updates

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Federal

Computation of tax for annualized tax for personal service corporation is updated to match a regular corporation.

Supporting Schedules will print behind Schedule O when there are more than 12 members within the group.

California

California credit form 3523 will now print the percentage amount on Line 10.

Delaware

Print positions have been updated on several forms per state specifications.

A new credit "Automatic external defibrillators credit" has been added.

Illinois Combined

Credits on Schedule 1299-A entered on the subsidiary and parent returns will now automatically transfer to schedule 1299-A on the combined return. Credits entered on the combined return will no longer flow to schedule 1299-A.

Kentucky

Schedule INV, Part 1 - Qualifications, #2, "Yes" check box, now fills in.

Maine

Form 1120ME, Page 5, Line 1s, total non-refundable credits, will no longer include the inactive credit input on Maine > Credits> Inactive.

Massachusetts

Federal Carryover Report will now include the MA NOLs that were not specifically entered for MA.

Oregon

Form OR-DRD, Oregon Dividend Deduction, has been added and Oregon Dividend Deduction worksheet has been removed.

Utah

Form TC20, Schedule A, Line 16, net operating loss carry forward: amount is limited to 80% of net taxable income.

S Corporation (1120S) Product Updates

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Delaware

Form 1100S late penalties and interest calculation now calculates late period from the correct due date.

Schedule A-1, Line 25 now also includes Form 1100S balance due per instructions

The extension form will now lock after the due date of the Delaware return.

The extension amount now adjusts for the refundable credits.

The Defibrillator credit has been added and the New Facilities credits have been renamed to Economic Development Credit.

Illinois

Schedule M, Line 25, amount will no longer flow to Schedule K-1-P, Line 47, per instructions.

Oklahoma

Form 500-B for Nonresident Partner Income tax Withheld for members present on the composite return is now available for electronic filing.

Rhode Island

RI 1096-PT, Line 7 will populate from payments with code "1W."

Tennessee Electronic Filing

Estimated tax payments include correct direct debit withdrawal date based upon the estimate due date.