CCH Axcess™ Tax

2018-3.3 Release Notes

March 31, 2019

CCH Axcess™

At the Center of the Firm in Motion

Contact and Support Information

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Product information can be accessed by visiting Customer Support online: CCH Axcess 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 Axcess™ 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 Axcess Tax releases: Release Notes.

Visit the Application Status Web page to view the current status of our CCH Axcess 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 Axcess™ 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 Axcess™ Tax Release Notes for the current year and for prior years, visit the Release Notes page on our Customer Support site.

Highlights for Release 2018-3.3

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2018 Tax Updates

Detailed information about the tax updates is available in our Knowledge Base. See the Hot Topics page on the CCH Axcess Tax Support site for links to articles that can help you apply these updates.

Individual

The IRS announced new relief for taxpayers. The underpayment of estimated tax penalty will be waived for individuals who have paid in 80% of their 2018 tax liability. Previously 85% of tax was required to have been paid to qualify for penalty relief.

2018 Electronic Filing Updates

Approved Products Available on this Release

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

Corporation

Georgia Consolidated
West Virginia Consolidated

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 1116

- Foreign branch income basket self-employed health insurance is allocated to the foreign basket for activities that have foreign sourced self-employment income.
- When the option to allocate state and local taxes to US source is selected, the amount from Schedule A, Line 5e is treated as US source.

New York

Form IT-196, Line 40 worksheet calculates correctly for Head of Household returns.

Form NYC-208, Line 26 calculates correctly when 1.5% rate applies.

Oregon

Carry forward credits for S Corporation shareholders flow to Schedule OR-ASC/OR-ASC-NP.

The College Opportunity Grant addition code 165 and modification code 652 are available.

Oregon - Multnomah/Portland/TriMet

Schedule R

- Input on Multnomah / Portland > General allows multiple units for a given rental entity.
- Now produces if the "Kind of property" field is not entered on Rent and Royalty > General.

Rhode Island Electronic Filing

When there is a balance due and banking information entered for electronic withdrawal, the default date for that withdrawal is 4/15/19 for the current filing season.

Virginia

Schedule A, Line 8a includes mortgage interest.

Partnership (1065) Product Updates

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Kentucky

Schedule K, Line 11 amount now matches the statement for this line.

S Corporation (1120S) Product Updates

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California

The taxpayer name has been updated on the S Corporation returns filing Form 540NR, Group Nonresident Return.

Fiduciary (1041) Product Updates

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Electronic Filing

Disqualifying diagnostic 40320 issues when the home state code is "MA" or "ME" and the fiduciary's address state code is other than "MA" or "ME". This diagnostic will instruct the user to enter a date of 04/15/2019 or earlier to avoid receiving a rejection from the IRS.

Vermont

The Vermont Fiduciary Estimated Tax Payment Vouchers, Form FIT-165, now show the year as 2019.

Estate & Gift (706/709) Product Updates

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Federal

The following Preliminary forms are available for dates of death in 2019:

- 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 U
- Schedule PC