CCH Axcess™ Tax

2018-5.0 Release Notes

November 3, 2019

Contact and Support Information

Return to Table of Contents.

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

Return to Table of Contents.

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 2018-5.0

Return to Table of Contents.

CCH Axcess Common

Aha! Ideas

Wolters Kluwer is implementing a new feedback tool, Aha! Ideas, to collect customer feedback for our CCH Axcess products. Aha! Ideas will improve our collaboration with our customers and will help us deliver meaningful enhancements. Feedback previously collected in the former tool will be retained and used going forward.

Note to our customers: The full functionality with Aha! Ideas will be made available over time. Initially, you will see the ideas you have submitted and the responses from Wolters Kluwer. In the future, you will be able to see ideas submitted by other people and “vote” on those ideas, accordingly. We appreciate your patience during this transition.

Install and Update Manager

The version of .NET Framework installed as a pre-requisite for CCH Axcess will now be upgraded to version 4.7.2 rather than version 4.5.2. This newer version of the .NET Framework will be automatically installed as a pre-requisite unless a newer version is already detected on the workstation.

Notification About Reactivated Users

You can now choose to be notified when an existing inactive user in CCH Axcess is reactivated. Detailed instructions are available in the help topic Managing Notification Conditions From Dashboard.

Last Login Date and Time

All staff can now see in the top right corner of the dashboard the date and time that their user IDs were used to log in prior to the user's current session.

64-Bit Upgrade

CCH Axcess now runs as a 64-bit application taking advantage of higher memory capacity in many computers. Client Import Utility, Staff Import Utility, and Batch Client Linking features are not compatible with this change. If you are running with a 64-bit environment, you will need to follow some special start-up steps to use these features. Visit https://support.cch.com and search for "CCH Axcess 32-bit Startup" instructions. We will have a fix for this in a future release.

CCH Axcess™ Tax

Return Configuration Settings (RCS)

The following options have been removed:

- Short Form Option (2017 and prior)
- Tax Notebook - Wolters Kluwer is sunsetting Tax Notebook effective with this release. The following references to Tax Notebook have been removed:
  - Applications Tax links (Tax Notebook Toolkit)
  - Return Manager – Last activity drop down
  - Organizer print sets
  - Organizer letters

Batch Manager

Large Return Calculation and Print - Large returns are now available for processing in Batch Manager without going through Return Manager first. The following updates were made:

- Added a column to indicate large returns for calculation or print
- Large returns cannot be processed with other returns
- Large returns print to PDF as:
  - Entire Return, or Return Sections
  - Same process as submitting through Return Manager

2018 Tax Updates

Organizers

Individual and Fiduciary Organizers are now available for processing.

Due to the sunsetting of Tax Notebook, the Tax Notebook letter has been removed from Correspondence Manager.

All Systems

Minnesota - If you filed Minnesota returns prior to the July 2019 tax legislation updates (any release prior to 2018-4.2), care should be taken to assure accurate information is carried into the 2019 returns. Once the return has been calculated on or after Release 2018-4.2, the return will reflect the updated forms and calculations. The originally calculated/filed amounts will not be available.

We recommend following these steps for returns filed prior to Release 2018-4.2:

1. Print the return without calculating. Keep this for your records and for comparison to the Department of Revenue's records, if needed.
2. Save the return as a second version before recalculating the original version.
3. Recalculate and save prior to running Organizer.

These steps will ensure that any adjustments made by Minnesota will be properly reflected on the Tax Year 2019 Organizer.

Tax Product Updates

Individual (1040) Product Updates

Return to Table of Contents.

Federal

Form 1040NR. Form 1040 Statement, Schedule 1 is produced when entries are present for taxable refunds carried to the 1040 Statement which calculates to $0 and the statement detailing the calculation is generated.

Form 1045. Form 1045, Schedule B, Line 9, is limited to the lesser of 80% of Form 1045, Schedule B, Line 2 or the sum of Form 1045, Schedule B, Lines 2 through 8.

Form 1116. Treaty information on the income summary references Article 23 (3) for the U.S. - Japan treaty.

Form 8938. On Form 8938, Part III, entries in Partnership Passthrough > Activity (Continued) > Foreign Transactions - Foreign interest and Foreign dividends fields will be included in Part III when an entry is also present for the Form 8938 option field.

Tax Equalization. Form 2441 hypothetical child tax credit calculates the proper spouse's earned income when hypothetical self-employment earnings are entered in Partnership Passthrough (IRS K-1 1065) > General > Hypothetical self-employment earnings/loss field.

Kentucky - Kentucky Cities

Amounts from Federal schedules will flow to the OL-3 when the account number is 10 digits rather than 9 digits.

Ohio - Ohio Cities

Monroe. The address has been updated to use P.O. Box 629 instead of the physical street address.

Toledo. The address has been updated for returns that do not have a balance due and are not requesting a refund.

Corporation (1120) Product Updates

Return to Table of Contents.

Federal

Floor plan finance interest expense will now be deducted when computing Adjusted Taxable Income on Form 8990 - Limitation on Business Interest Expense Under Section 163(j).

Percentage of cost depletion will no longer be included in the 1120 to 1120S converted file beginning in the 2018 to 2019 Roll Forward release.

Schedule A, Column 15, apportioned share of deductions will now exclude dividends received deduction under Section 245A from Schedule H, Part II, Column 3a(1), 3b(1), 3c(1), 3d(1), 3e(1), and 3f(1).

Form 1118 > Schedule H, Part I General income category, 245 dividend income and R & E deductions are now correctly linked.

Power Pack

Form 1120-PC, Schedule M-3, Part III, Line 39, Other Expense/Deduction Items with Differences. The supporting statement now reads "Total to M-3, Part III, line 39".

Consolidation

1120-L, Page 1, Line 24, Phased inclusion of balance of policyholders surplus accounts will now accumulate to the consolidated return.

Consolidated 1120-L return, net capital gain on Schedule D will now include net long term capital gain/loss.

Consolidated Form 8810, net active income calculation will now consider an elimination entry for bad debts when Form 6198 is also present in the return.

Interest expense entered in Deductions > Schedule M-3 Detail will be accumulated to Line 1 of Form 8990 - Limitation on Business Interest Expense Under Section 163(j).

Mixed Group Consolidated return - Consolidated disallowed interest expense adjustment will now be included on Form 8916, Line 7, Other Adjustments.

California Combined

Form 3531 will now print when credit recapture is the only amount on the form.

Delaware

DE - 1100. When an amount is included on Line 14 and Line 20 is greater than Line 15, then Line 22 will now be calculated as Line 22 less Line 15.

Hawaii

Added electronic filing rejection when Form N-30, Page 2, Schedule C has dividends entered (including a user entered zero) without description.

Amended N-30 returns with a prior refund will no longer be disqualified from electronic filing.

Form N-201V will not print when Direct Debit feature is used to pay tax on return.

Hawaii Electronic filing returns will not disqualify if there are Hawaii Optional PDFs in the return. Hawaii does not allow these for electronic filing.

Illinois Combined

Form IL-4562 will no longer print blank statements.

Schedule UB, Step 4, Line 4, Column D apportionment percentage is now correct when the Illinois Unitary Return Automated Feature is used.

Schedule UB/NLD, Line 29 will not include positive amounts from Lines 6, 12, 18, 24, if multiple sheets are needed.

Illinois Electronic Filing

Diagnostic 46132 no longer issues when IL Schedule J, Lines 10 -12 match Form 1120, Schedule C, Lines 16b and 16c.

Indiana

IN county code will only fill with numbers.

Statement for IT-20 Line 12 will no longer produce.

Indiana Electronic Filing

Diagnostic 60487 will issue if location of records is not completely filled out.

Diagnostic 60488 will issue if a first and last name for personal representative is not used.

When foreign location of records is used, the electronic files fill correctly.

New Jersey

The printing of Form CBT-100, Schedule J allocation factor has been adjusted to match the form. The electronic file was always correct.

North Carolina

Interest rate on tax assessments and refunds, for period of 01/01/2019 through 06/30/2019, is updated to 6%.

Oregon

Oregon has issued new instructions detailing the reaction to the TCJA. A new addition code and three new subtraction codes have been added for GILTI, FDII, and Section 245a dividends. Filers with these new modifications have to paper-file their return.

Texas

Form 05-160 and 05-178 will now generate when tax is zero.

Wisconsin

Schedule CR and Schedule CF will apply credit amount from the Schedule MA-M, Manufacturing Credit before the credit amount from the Schedule R, Research Credit.

S Corporation (1120S) Product Updates

Return to Table of Contents.

Federal

Form 1120S, Schedule M-3, Line 7, Income (Loss) from U.S. Partnerships, now includes Subpart F income entered in Income/Deductions > Partnership Passthrough > 11H Subpart F income.

Form 8990, Lines 12 and 19 have been updated to include gain and losses from passthrough entities.

Schedule K-1: The supporting statement for Other Income will reflect Line 10h.

The Section 199A amounts are not getting reported on the Shareholders' Schedule K-1, Line 17V at the Consolidated level in Combined returns unless the option to suppress the automatic consolidated QBI recalculations is selected in Consolidated > Options > Line 34.

Consolidated

Form 8992, U.S. Shareholder Calculation of Global Intangible Low-Taxed Income (GILTI) from a separate company entered in Foreign > Form 8992 > 2-Schedule A-Net Tested Income and GILTI Allocated now automatically carries to the consolidated return.

District of Columbia Electronic Filing

An adjustment has been made to ensure that Form D-20, Line 34 is marked as a negative value on a combined return when appropriate.

Hawaii

Correction to ELF Status description for Hawaii Amended returns.

Electronic filing for Hawaii S Corporation will disqualify when an override for underpayment penalty is present in the return and Form N-220 is not present.

Kentucky - Kentucky Cities

Grayson county tax rate has been updated.

Warren county address has been updated.

Maine

Diagnostics 30776, 48274, and 49054 will no longer reference interview forms when in worksheet view.

Missouri - Kansas City

Federal Computation of Federal Taxable Income form attached to Kansas City Form RD-108 will now include its statements for city filing.

Missouri - Kansas City Electronic Filing

Voucher will print when RD-108, Line 16 is more than $0 and bank debit/withdrawal information is not provided.

Ohio - Ohio Cities Electronic Filing

Input for Columbus on Ohio Cities > City Detail > City Code CO03 (Interview Form OHC3) will no longer need to be deleted and reentered when switching return types.

RITA licensing diagnostic 41287 will no longer issue when the account is licensed for Ohio electronic filing.

South Carolina

The late payment interest calculation on Form SC1040, Page 3, Line 32 now reflects mid-year changes in the rate.

Texas

The carryover report will now appear when prior year and current year temporary business loss credit exists on Form 05-160.

Wisconsin

Form U will include the tax from Form 5S-ET, Line 20 in the calculation of the underpayment penalty.

Losses on Form 5S-ET will now carry to Column E correctly. They will be limited to -3000.00 total.

Partnership (1065) Product Updates

Return to Table of Contents.

Delaware

DE Schedule K-1 L16A and 16B will no longer include Expenses from Investment Income. This amount is already present on L15A and L15B.

DE Schedule K-1, Line 16. Statement for credits and credit recapture will now display correctly for credit "LIH - Other - Post-2007 building."

District of Columbia

An adjustment has been made to ensure that if special allocations are being used for a combined return for DC for K-1, Lines 3 and 4, the proper amount will be allocated.

Minnesota

Schedule RD will be printed with the return when it is activated.

Nevada

A revised diagnostic will be issued to indicate that Nevada filing requirements have changed for taxable year 2018/2019. Businesses with gross revenue that is $4,000,000 or less are no longer required to file a commerce tax return.

South Carolina

The late payment interest calculation on Form SC1040, Page 3, Line 32 now reflects mid-year changes in the rate.

West Virginia

Form NRW-2 will print when needed based on Schedule SP.

Wisconsin

WI 1065 1CNP2, Column D, guaranteed payments. Partners that are included in the return will no longer pick up the amounts from partners that are not included in the return.

Fiduciary (1041) Product Updates

Return to Table of Contents.

Federal

ESBT Schedule I. Line 2 of ESBT Schedule I will now pull the difference between ESBT 4952 and ESBT 4952 AMT when there is an ESBT 1116 in the return.

Form 6252. QBI Ordinary Gain (Loss) input has been added to Installment Sales > General.

Tennessee

Tennessee Report of Debts will now only be required when amending the Tennessee return.

Tennessee Electronic Filing

An electronic filing diagnostic will now appear if Form TN 250 has an amount on Line 8 or 9 and is being manually suppressed.

Exempt Organization (990) Product Updates

Return to Table of Contents.

Federal

Form 8827, Line 8b has been updated to calculate the current year refundable minimum tax credit when applicable.

Estate & Gift (706/709) Product Updates

Return to Table of Contents.

Federal

The following final form is available for dates of death in 2019:

- Schedule R-1

Illinois

The following form is updated for revisions posted by Illinois:

- Form 700-EXT

Minnesota

The following final Minnesota form is available for dates of death in 2019:

- Form M706

New York

The following final New York State form is available for dates of death in 2019:

- Form ET-706