CCH Axcess™ Tax
2019-2.4
Release Notes

February 2, 2020

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 2019-2.4

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Tax Updates

Individual, Partnership, Corporation, S Corporation, Fiduciary, and Exempt Organization

Paper Batch Extension Program - 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.

Individual

- **Tax Projector** - Tax Projector is available in this release.
- **Consolidated Appropriations Act of 2020** - Form 8917, Tuition and Fees, is now available.
- **Prior Year Earned Income** - Prior Year Earned Income, along with 60% contribution carry forward amounts, now rolls forward for Schedule 8812 and Schedule EIC purposes.

S Corporation

The following fields have been updated for Roll Forward on Federal > General > Return Options > Processing Options:

- Last four digits of SSNs on Form 1125-E
- Return summary and tax balance summary option
- Suppress calculation history report
- Print state tax deduction schedule
- Print Sec. 163(j) election statement for Schedule K-1

Fiduciary

Form 461 carryovers now roll forward correctly. Our Update Pro Forma feature will be available for this issue with Release 2019-2.6.

Electronic Filing Updates

Individual and Fiduciary

Massachusetts - The signature forms remain preliminary with a watermark and will be available with Release 2019-2.5 on Sunday, February 9.

Approved Products Available on this Release

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

Individual

California	Kentucky	Minnesota Form MNPR
California Extension	Louisiana	Ohio Cities - Insource
Delaware	Louisiana Extension	Pennsylvania
Delaware Extension	Minnesota	

Corporation

Connecticut	Minnesota	West Virginia
District of Columbia Combined	Minnesota Consolidated	West Virginia Consolidated
Illinois Combined	Rhode Island	
Massachusetts	Rhode Island Consolidated	

S Corporation

Connecticut	Rhode Island	Wisconsin Form 4
District of Columbia Combined	West Virginia	
Massachusetts	Wisconsin	

Partnership

Connecticut	Oklahoma	West Virginia
District of Columbia Combined	Rhode Island	

Fiduciary

Delaware	Minnesota	Wisconsin PTE
Delaware Extension	Wisconsin	
Michigan	Wisconsin Closing Certificate	

Exempt Organization

Florida	New York	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 District of Columbia security requirements for electronically filing extensions. District of Columbia requires confirmation of the accuracy of prior year (rolled forward) data. 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.

Individual

- Federal
- Arizona
- Arkansas
- Connecticut
- District of Columbia
- Louisiana
- New Jersey
- New York
- North Carolina
- Pennsylvania
- Vermont

Corporation

- Federal
- Arkansas
- Connecticut
- Kentucky
- Maryland
- New York
- North Carolina
- Pennsylvania

S Corporation

- Federal
- Arkansas
- Connecticut
- Kentucky
- Maryland
- New York
- North Carolina
- Pennsylvania

Partnership

- Federal
- Arkansas
- Connecticut
- Maryland
- New Jersey
- New York
- North Carolina

Fiduciary

- Federal
- Arizona
- Connecticut
- Delaware
- District of Columbia
- New Jersey
- New York
- Pennsylvania
- Tennessee

Exempt Organization

- Federal

Tax Product Updates

Individual (1040) Product Updates

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Federal

The business interest expense worksheet has been updated to calculate the limited business interest expense when Schedule A interest is the only interest entered in the return.

Electronic Filing

Schedule F. If a description without an amount or an amount without a description is entered for other expenses, disqualifying diagnostic 40369 is not issued.

Louisiana

Nonrefundable priority 1 credit 110 for the family responsibility credit is no longer active.

North Carolina

QCD amounts will no longer be added on Sch S, Line 5 or deducted on Sch S, Line 21.

Corporation (1120) Product Updates

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Federal

Schedule M-3, Part II, flow-through lines now include prior year carryovers entered in Income/Deductions > 8990 - Interest Expense Limitation > Disallowed Business Interest from Prior Year.

S Corporation (1120S) Product Updates

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Federal

QBI losses will be reflected on the Schedule K-1 QBI statement.

Pennsylvania

Form PA-20S/PA-65 will be listed as "Pennsylvania S Corporation Income Tax Return" on the Axcess Cover Letter.

Partnership (1065) Product Updates

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Federal

The paragraph giving the payment due date will have a space between "below" and "on or before...".

The Schedule K-1, Line 20 Code Z, Section 199A statement will now include the Total Ordinary Income, Total Royalty Income, or Total Other Income for all depletion properties under the same entity.

The partnership passthrough import worksheet has been updated for changes to the passthrough input. If you have exported the worksheet to an Excel® file before this release, you will not be able to use the automatic import feature. You will need to manually map the import.

New York

New York IT-204-CP, Page 7, Line 60 statement for partnership partners will now only show descriptions and amounts once. The total on the statement will now match the amount reported on IT-204-CP, Page 7, Line 60.

Estate & Gift (706/709) Product Updates

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Federal

To override the addressee in filing instructions and cover letters, use General > Letters and Filing Instructions > Filing Instructions and Cover Letter > Addressee - Overrides.

To override the addressee in transmittal letters, use General > Letters and Filing Instructions > Transmittal Letter > Addressee - Overrides.