

CCH Axxess™ Tax  
2024-2.6  
Release Notes

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<b>Contact and Support Information</b>	<b>2</b>
<b>Information in Tax Release Notes</b>	<b>3</b>
<b>Highlights for Release 2024-2.6</b>	<b>4</b>
Tax Updates .....	4
Electronic Filing Updates .....	4
<b>Tax Product Updates</b>	<b>7</b>
Individual (1040) Product Updates .....	7
S Corporation (1120S) Product Updates .....	8
Partnership (1065) Product Updates .....	9
Fiduciary (1041) Product Updates .....	11
Exempt Organization (990) Product Updates .....	12
Estate & Gift (706/709) Product Updates .....	13

## Contact and Support Information

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Return to [Table of Contents](#).

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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Return to [Table of Contents](#).

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 2024-2.6

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Return to [Table of Contents](#).

### Tax Updates

#### Individual

**West Virginia.** Input is now available to allow electronic filing when claiming one of the credits on Line 21 of the WV IT-140.

- For Motor Vehicle Property Tax (21A) – Input must be made on West Virginia > Credits > Other Credits > Motor Vehicle Property Tax Adjustment Credit.
- For Disabled Veteran Real Property Tax (21B) or Small Business Property Tax (21C) – A PDF code of WV50 and WV51 has been added on Federal > Electronic Filing > PDF Attachments to attach a PDF when claiming these credits.

#### Gift Tax

**Federal.** Input has been added under Federal > Gift Tax > Gifts > Description of Gift or ETIP > Description of Gift to fill Schedule A, Column d. This will flow to a statement behind the schedule due to the size limitation of the column and is limited to 59 characters. Data entered in the previous description of gift (Federal > Gift Tax > Gifts > Description of Gift or ETIP) has not been removed and will still flow to Schedule A, Column b. To remove the “Description of Gift” from Column b, the data in Federal > Gift Tax > Gifts > Description of Gift or ETIP must be deleted.

The donee’s relationship will flow to the statement behind the Schedule A due to column width on the form instead of Column b.

### Electronic Filing Updates

#### All Systems

**Colorado.** The state has not provided an opening date for filing for any product. We are monitoring closely.

#### Corporation & S Corporation

**Michigan.** If banking information was included in a Tax Year 2024 Michigan CIT return, the state will not process the payment as expected. If a balance due needs to be paid, please use one of the options below to complete the necessary payment by the due date:

- **Electronic funds Transfer (EFT).** Make the necessary payment on the Treasury’s [website](#).
- **Paper Payment Voucher.** If you choose to mail your payment, please include Form CIT-V. This voucher can be printed from the [MI website](#).
- **Michigan Treasury Online (MTO).** Taxpayers may access their account on MTO and initiate a Free EFT debit or a credit/debit card payment. A transaction fee may apply for credit/debit card payments.

Once Michigan goes live with the banking draft within the electronic file, the diagnostic will be removed. Please monitor Software News/Release Notes for updates.

## Individual

Federal Form 1042	Montana	Multnomah Form SP-2024
Connecticut	Multnomah Form ARTS	Multnomah Form TM
Connecticut Extension	Multnomah Extension Form SP-2024	Ohio Cities - Columbus
District of Columbia	Multnomah Form LTD	Rhode Island
District of Columbia Estimates	Multnomah Form MET-40	Rhode Island Extension
District of Columbia Extension	Multnomah Form Preschool	

## Corporation

Connecticut	Michigan Consolidated	Multnomah Form MET-BIT
Connecticut Estimates	Michigan Form MBT	New York City Consolidated
Connecticut Extension	Missouri	Oklahoma
Georgia	Missouri Consolidated	Oklahoma Consolidated
Hawaii	Multnomah Form C-2024	West Virginia
Hawaii Consolidated	Multnomah Form CES-2024	West Virginia Consolidated

## S Corporation

Alabama Extension	Connecticut Form CT-PET Extension	Multnomah Form MET-BIT
Arkansas	Idaho	Multnomah Form SC-2024
Arkansas Composite	Michigan Form MBT	New Jersey Magnetic Media
Arkansas Form 1100 PET	Missouri	Oklahoma
Arkansas Magnetic Media	Montana	West Virginia
Connecticut Extension	Multnomah Form CES-2024	

## Partnership

Federal Form 1042	Arkansas Form 1100 PET	Missouri
Alabama Estimates	Connecticut Extension	New Jersey Magnetic Media
Arkansas	Connecticut Form CT-PET Extension	Oklahoma
Arkansas Composite	Idaho	Rhode Island
Arkansas Magnetic Media	Michigan Form MBT	West Virginia

## Fiduciary

Alabama	Alabama Extension
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## Exempt Organization

Federal Form 990-T  
Federal Form 5227  
California

District of Columbia  
Florida  
Maryland

Michigan  
New York  
New York Estimates

## Tax Product Updates

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### Individual (1040) Product Updates

Return to [Table of Contents](#).

### Pennsylvania – Pennsylvania Cities

The tax rate for Westtown - Township is now 1.08%.

## S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

### Federal

**Form 8936 Schedule A.** The correct checkbox for Form 8936, Schedule A, Box 6 will now be included in the electronic file.

### Arizona

**Form AZ 120/165V** prints in the client and government copies when the amount is less than \$500.

**Schedule K-1/Schedule K-1 (NR).** The shareholder's pro rata share of AZ PTE tax paid in 2024 for the 4th quarter carries to the Schedule K-1, Line 10 or the Schedule K-1 (NR), Line 23 as needed.

### Indiana

**IN PTET Estimates** now produce four vouchers instead of one voucher.

### Kansas

**Form K-120S, Part III.** Partner Type column has been updated to reflect an "I" if the shareholder is a grantor trust.

### New York

**Form CT-225, Schedule B, Part I** defaults to modification code 217 for reporting the subtraction of the amount of PTE tax refund included in Federal taxable income.



## Partnership (1065) Product Updates

Return to [Table of Contents](#).

### Federal

**Form 2848.** The following lines were updated to allow printing more characters:

- Page 1, Line 3
- Page 2, Line 7

### Alabama

**Form 65, Schedule A, Line 4** contains the Alabama state and city taxes entered on Federal > Income/Deductions > Business > Taxes and Licenses. To override Line 4, use the input on Alabama > Income / Deductions > Income > State income taxes not deducted – override.

### Arizona

**Form 220/PTE, Line 6e** is the minimum of Line 6a or 6d.

### Delaware

Masking has been added for all Delaware forms to mask SSN and EIN.

### Georgia

Form IT-CR form code 4 has been set to inactive. Form code 3 now calculates to the tax rate instead of tiered.

### Idaho

**Schedule K-1, Line 60** is calculating correctly when Form 44, Line 1 is filled and the return is being filed as an ABE.

### Indiana

**IN PTET Estimates** produce four vouchers instead of one voucher.

**Schedule Composite** no longer prints when there are zero partners listed on the form.

### Michigan – Michigan Cities

**Big Rapids** - Schedule K-1, Part L, will now check boxes for applicable partner if the following codes are selected: 1 - Tax Basis, 2 - GAAP, 3 - Section 704(b) book and 4 - Other, on the Federal > Common State/City > Generic State Schedule K-1 information > Generic Partner Input > Code 1 field.

### Montana

**Montana Schedule K-1, Part V, Line 3a** automatically calculates for second-tier partnerships and tax exempt entity partners regardless of residency.

## Tennessee

**Schedule J.** Estimates are based on the adjusted business income after the standard deduction on Form 170, Line 33 or Form 174, Line 38.

## Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

### Federal

**Forms 3520 and 3520A.** Final checkbox will properly fill when final return is selected.

**Form 4868.** The address when no payment is being sent with the extension is now correct.

### Maryland

Electronically filed extensions with a zero balance due will no longer receive a rejection.

## Exempt Organization (990) Product Updates

Return to [Table of Contents](#).

### Florida

Returns receiving Rejection 00013 can be resubmitted after calculating on this release.

## Estate & Gift (706/709) Product Updates

Return to [Table of Contents](#).

### Federal

#### Form 709

- **Schedule A.** Column B will print within the designated space. Columns C and D will print on new white paper statements.
- **Schedule A, Part 1.** The checkbox on Column L, deductible gift to spouse, will only fill when the donee is marked as the spouse.
- **Schedule A, Part 2.** The entries on this section will print without issue in all situations.
- **Schedule A, Part 3.** The entries on this section will print without issue in all situations.
- **Transmittal Letter.** The lead paragraph reflects the new Notice of Consent needing to be signed by the spouse for the taxpayer's return.