

CCH Axxess™ Tax
2024-3.0.2
Release Notes

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Wolters
Kluwer

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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 2024-3.0.2

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Tax Updates

Individual

Minnesota

Form M1, Individual Income Tax. The tax calculation for Line 10 was corrected for individuals filing Married Filing Separately with taxable income between \$90,000 - \$92,020.

S Corporation

Missouri

Form MO-1120S, S-Corporation Income Tax Return, Line 1a, will include the addback of all state taxes as required by the instructions.

S Corporation & Partnership

Connecticut

- Connecticut has extended the due date of Form CT-1065/CT-1120SI, Connecticut Composite Income Tax Return, and Form CT-PET, Connecticut Pass-Through Entity Return, to April 15th. Please see the announcement [here](#). Due dates in the return have not been adjusted for this.
- Transmittal Letters will generate for the Connecticut Pass-Through Entity Return.

Missouri

Schedule PTE-BD, Missouri Business Income Deduction, Line 8, will include the Section 179 deduction as expected in the total.

Oklahoma

Form EF-PTE, Pass-Through Entities Income Tax Payment Voucher. Fields have been changed to allow overrides.

Partnership

Connecticut

The underpayment penalty from Form CT-2210PE, Underpayment of Estimated Tax by Pass-Through Entities, will flow to form CT-PET, Connecticut Pass-Through Entity Tax Return, Line 9c.

Montana

- Form PTE, Montana Pass-Through Entity Tax Return, Schedule IV, Part IV, Column F, will equal Column C less the sum of Columns D/E.
- Schedule K-1, Montana Schedule K-1, Part V, Line 3a, is automatically calculated for S Corporation and Partnership owner types.

Estate & Gift

Form 709

- The spouse's name and Social Security Number will print at the top of pages 7 and 9 of the spouse's Form 709.
- The menu was updated to reflect that Page 9 of the spouse's Form 709 is Schedule D.

Form 709, Schedule A. Part 3 of the spouse's Form 709 will state to "See continuation sheet(s)" on the filer's gifts section.

Electronic Filing Updates

S Corporation

Alabama

Extension payments should no longer go to a status of "Missing State Information" and will now process to the taxing authority as expected.

Connecticut

Member information will be included in the electronic file for Form CT-1065/CT-1120SI, Composite Income Tax Return, Part 5 when a Section 179 deduction modification is present. The returns will no longer go to a status of "Schema Validation Error" and will now process to the taxing authority as expected.

S Corporation & Partnership

Minnesota

Schema version was updated to address the Minimum fee update by the state.

Tax Product Updates

Individual (1040) Product Updates

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Minnesota

Form M1, Line 10, Tax from the Tables or Schedules in the Form M1 Instructions calculates the amount of tax correctly for married filing separately returns with taxable income between \$90,000 - \$92,020.

S Corporation (1120S) Product Updates

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Alabama

Extension payments should no longer go to a status of "Missing State Information" and process to the taxing authority as expected.

Connecticut

Diagnostic has been added for when Form CT-1065/CT-1120SI, Page 5, Part 3 is incomplete/missing required information

Forms CT-1065/CT-1120SI, Page 6, Part 5 member information will now be included in the electronic file when member only has Section 179 deduction (Line 11).

Missouri

Form MO-1120S, Line 1a will include the addback of all state taxes as required by the instructions
Form MO PTE-BD, Line 8 will subtract Lines 6 and 7.

West Virginia

Schedule A, Line 10 prints 0 when Form PTE-100APT, Schedule B, Column 3 is 0.

The EPT forms no longer print blank.

Partnership (1065) Product Updates

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Connecticut

Diagnostic installed for when Form CT-1065/CT-1120SI, Page 3, Part 1, Schedule C, Line 13 is negative.

Form CT-PET, Line 9c updated to generate from CT-2210PE, Line 6.

Missouri

Form MO PTE-BD displays the correct FEIN.

Missouri Form PTE-BD, Line 8 is subtracting Line 6 and 7.

Montana

MT PTE Sch IV, Part IV, Column F equals Column C minus Columns D and E.

Sch K-1, Part V, Line 3a is automatically calculating for Partnership and S Corporation owner types.

Estate & Gift (706/709) Product Updates

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Federal

Form 709.

- **Page 9** of the spouse's Form 709 will reflect in the tree menu that it is Schedule D.
- **Schedule A, Part 3** of the spouse's Form 709 will state to "See continuation sheet(s)" on the filer's gifts section.
- The spouse's name and SSN will print at the top of Pages 7 and 9 of the spouse's Form 709.