

CCH Axcess™ Tax
2013-2.5 Release Notes

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CCH Axcess™
At the Center of the Firm in Motion

Contact and Support Information	2
Technology Updates	3
Electronic Filing	3
Batch Electronic Filing of Extensions	3
Foreign Bank and Financial Account reports (FBAR)	3
Tax Product Updates	4
Individual (1040) Product Updates	4
Partnership (1065) Product Updates	6
Corporation (1120) Product Updates	8
S Corporation (1120S) Product Updates	10
Fiduciary (1041) Product Updates	12
Exempt Organization (990) Product Updates	13

Contact and Support Information

[Return to Table of Contents.](#)

Product and account information can be accessed by visiting Customer Support online at Support.CCH.com/Axcess. 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 are 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 find Support calendars, as well as options to enter Web tickets for assistance.

Technology Updates

Return to [Table of Contents](#).

Electronic Filing

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

Individual

Arizona, Arizona 4868, Massachusetts, Massachusetts Extension, Michigan Cities, Ohio non-RITA Cincinnati and Hamilton Cities (Insource), Ohio RITA Form 37 Cities

Fiduciary

Federal, Minnesota, New York, New York Extension, West Virginia, Wisconsin

Batch Electronic Filing of Extensions

Batch electronic filing of extensions is available on this release for the following taxing authorities:

Individual

Federal, Arizona, District of Columbia, Louisiana, New York, New York City, Tennessee Form INC-250

Fiduciary

Federal, New York

Corporation, S Corporation, Partnership

Federal, Maryland, New York, New York City, Tennessee, Pennsylvania

Exempt Organization

Federal, New York

Foreign Bank and Financial Account reports (FBAR)

Individual, Corporation, S Corporation, Partnership, Exempt Organization

You can now electronically file FinCEN Form 114, Foreign Bank Account Report (previously Form TDF 90-22.1). As FBAR filings are transmitted and tracked separately from the main return (1040/1120/etc.), there will be a separate transactional charge for each electronically filed FBAR.

Tax Product Updates

Individual (1040) Product Updates

Return to [Table of Contents](#).

Federal

Depletion calculated from passthrough input no longer uses regular percentage depletion carryover on the AMT depletion schedule, even if no AMT percentage depletion carryover is used.

Form 1040. When self-employed health insurance is entered on multiple Income/Deductions > Wages, Salaries and Tips > Other (IRS W-2s) that are associated with an S Corporation Passthrough, the sum of the self-employed health insurance is included in the calculation of the Self-Employed Health Insurance Deduction worksheet that supports Form 1040, Line 29.

Form 114. The BSA e-filing report third party box is now always checked.

Form 114. The filing year on Line 1 allows entries for any prior year on Report of Foreign Bank and Financial Accounts > General > Filing year if not 2012 or 2013.

Electronic Filing

Form 1040. Disqualifying diagnostic 40057 does not issue when only one entry is presented on Schedule E, Page 2, Line 28(b) equal to 'P.'

Arkansas Electronic Filing

Reject IIT2013-0071a issues when preparer information is either suppressed or omitted from a return and the non-paid preparer code is not entered on the Electronic Filing > Electronic Return Originator - Overrides > Non-paid preparer option field. Electronic filing diagnostic 44789 issues when the non-paid preparer code has not been entered and paid preparer information is missing or incomplete.

District of Columbia

When a paper check has been selected to be received for the refund, the paper check box on Form D-40 will be selected and diagnostic 36402 will be issued informing the preparer/taxpayer of such.

Georgia

Form GA 500, Schedule 2 , Line 4, qualified education expense credit is limited when there is a carryover from previous year(s).

Illinois Electronic Filing

Disqualifying diagnostic 48949 issues when the recipient identification number on Form IRS-1099R does not match the social security number on Form IL-1040, Step 1A.

Removed invalid characters entered on the Basic Data worksheet > General section > Apartment number field for the apartment number which calculates on Form IL-1040, Step 1B.

Indiana

Form IN POA1, Page 2, Part 4, Firm representatives', phone numbers and emails display properly on form and on white paper statements.

Iowa

Form NOL no longer includes the health insurance deduction on Line 2c, as this is a business deduction. Only nonbusiness adjustments to income should be included on Line 2c.

Kansas

K-40H, Line 4a, will not double the loss reported on Schedule S, Part A. Lines A7.

Kentucky Electronic Filing

Disqualifying diagnostic 47644 does not issue when the Kentucky state withholding has been entered on an IRS W2G.

New York

Form IT-201-V no longer holds numbers from previous calculations.

New York Electronic Filing

Disqualifying diagnostic 41035 no longer issues because Form IT-203-C is filed.

The paid preparer's city is limited to 20 characters per the New York schema limit.

New York 204LL Electronic Filing

Disqualifying diagnostic 56546 issues when the name or phone number is missing.

Oregon

Itemized deductions do not include medical expenses when the taxpayer is over the age of 62 and the expense is not allowed to be taken.

Pennsylvania - Pennsylvania Cities

Updated CLGS-32-1 and CLGS-32-3 to pick up PSD and Work PSD codes entered in the return configuration set.

Partnership (1065) Product Updates

Return to [Table of Contents](#).

Federal

Default heading lines will now show on the Schedule K-1 transmittal letter when Custom Letterhead is not present in the return configuration set and the return level override to use the business name as the heading for the Schedule K-1 transmittal letters is explicitly "No."

Form 8805, Line 9 and Line 10, now calculate according to Form 8805 instructions.

Menus are updated so that all partner depletion forms are viewable in the tree menu formats. Print controls updated so that all partner depletion forms are included when printing the K-1 copy.

Transfer dates are added to the partners' change of interest and transfer, import/export summary worksheet. This will enable you to create multiple entities for import purposes.

Alabama

Standard filing instructions are updated to mail the form to the appropriate address when there is a payment and payment voucher and when the option on Worksheet Alabama > Other Returns > Business Privilege Tax Return > PPT payment made via electronic funds transfer is "No."

Arkansas

Form 1050 Line 22, Arkansas source and AR K-1 Other Deductions are now reported as entered when the override is removed.

California Electronic Filing

California reject X0000-010 has been resolved when a zero was included on California form 568, Line 1.

California returns in 490 status are resolved when Form 592-B is present in the return.

Illinois

Form IL1065, Line 4, no longer includes federal Schedule K, Line 9c.

Iowa Electronic Filing

Form IA-8453 will no longer produce the message "This is not a Fileable Copy" at the top of the form when the return has been exported.

Kansas

Form KW-7S now only allows 33 characters in the address field.

Forms KW-7 and KW-7S now print 2013 dates instead of 2014.

The government instruction links are now available on all forms.

Massachusetts

When a transfer of interest is entered at the Federal level on Partners > Transfers of Interest > Changing in Partners' Interest and Transferring Information, Schedule 3K-1 now only checks the box on those partners

involved in the transfer.

Minnesota

Entries on Worksheet Minnesota > Income/Deductions > Other Distributive Share Items > Subtractions Due to Federal changes not adopted by Minnesota are now included on Schedule KPI, Line 11, and/or Schedule KPC, Line 16.

Form M3A 'Place an X in the box if you conduct all activity in Minnesota and enter 1.00000 on line 6' box will now X if all factors present are 1.00000.

Missouri Electronic Filing

Custom filing instructions are updated for returns with Letters option 4.

Oregon

Keogh and Health Insurance Premiums no longer double on Schedule K-1, Line 13, Other Adjustments.

OR Schedule K-1, Lines 1-18, will no longer fill if the partner is a resident of Oregon.

Schedule K-1, Affidavit check box is now selected when an affidavit is filed, and the Not required check box is now selected when the member is not filing a composite return, affidavit or Form OR-19.

Oregon Multnomah County

The Annual Exemption Request Form prints and is referenced in the transmittal letters and filing instructions when the default option is used in Oregon > Multnomah / Portland > Basic Data > County/city.

Pennsylvania

Pennsylvania Schedule G-L has been modified to automatically flow to the PA-65 and RK-1.

Wisconsin Electronic Filing

Diagnostic 43111 and diagnostic 44250 are changed to allow values on Schedule 3K-1 between 0% and 100% on Lines J and N.

Corporation (1120) Product Updates

Return to [Table of Contents](#).

Federal

Form 1139. The standard instructions have been updated to give the correct paragraph with the mailing address for this form.

Form 4626. AMTI for DPAD has been adjusted with section 1382 deduction for Form 1120-C when designated as agricultural and horticultural cooperatives.

Form 8275. An update is made to the description fields that affects the printing of Part I and Part II.

Form 8697. Fiscal year beginning and ending dates now print on the form when interest should be refunded.

Form 8858. Top of form message "Filed Pursuant to Announcement 2004-4 for Dormant FDE" will no longer print when input is deleted.

Form 8936. The print positions on Page 1 have been updated.

Consolidation

Level 1 diagnostics and warning messages have been added when an attempt is made to convert a previously calculated consolidated return to a non-consolidated return. Also another level 1 diagnostics and warning messages have been added when an attempt is made to convert a previously calculated regular return to a consolidated return.

Electronic Filing

Form 1120-F returns will no longer stop for PDF error when Form 8288-A is attached as a PDF.

Georgia

Forms 600 and 600S Georgia Sales Tax Registration will now print up to 11 digits.

Georgia Consolidated

Form 600, Credits allowed for each member, will be calculated as taxable income less consolidated net operating loss. The consolidated Form 600, Schedule 3, Line 3, Credits, will use the override amount entered on Worksheet Georgia > General> Basic Data> Credits claimed - override.

Kentucky

Form 720, Page 1, Part II, Line 1, will now correctly calculate when input has been changed causing a loss instead of income.

Michigan

Form 4899 will no longer generate if the prior year tax paid was not greater than \$800.

Missouri

Sporting Event Credit, Sporting Contribution Credit, and Missouri Works Credit have been added to Form MO-TC.

New York City Electronic Filing

New York City electronic filing transmittal letters and filing instructions for all return types now reflect the correct payment option indicated in the return.

Pennsylvania

The PA REV-799 - Schedule C3 has been updated to include amounts entered for RCT-101> Income and Deductions> Other Adjustments > Schedule C3 > Bonus Depreciation when the year 2002 is entered.

Tennessee

Form 170, Page 1, taxpayer signature date will include input from Electronic Filing Worksheet, Electronic Signatures section, date signed by taxpayer field instead of the Return Options worksheet, Preparer Information section, date signed by preparer field.

Texas

Form 05-158-A. The box in the header section "Check box if this is an Entity other than a Corporation or LLC" is now government view overrideable.

Virginia

Form 500AC. A foreign address will be included in the e-file when applicable. Form 500ADJ, Section C, Line 5, will be zero when no other lines are filled so the form will be included in the electronic file per business rule 500-065.

The entry for Virginia estimates on the cover letter will change to read '2014 Virginia Tax Information' since the vouchers are obsolete.

Wisconsin

Calculated zeroes on Schedule MS, Part II, Column C, are removed and fields are now blank if equal to zero.

S Corporation (1120S) Product Updates

[Return to Table of Contents.](#)

Federal

Shareholder Information worksheets have been updated for sections pertaining to state tax returns for Kansas, Kentucky, New Jersey, New York, South Carolina, and Virginia. These sections will now associate with the applicable shareholder number when the state section is displayed and the information will better carry to the applicable state. Use caution if information has been entered on a previous release.

Alabama

Schedule AL-CAR - Corporation Annual Report, will now be suppressed when LLE taxed as S Corporation is selected for Type of taxpayer on Form PPT, Line 2d.

California

The statement supporting Form 100S, Page 3, Schedule F, Line 7, Compensation of Officers, will now report the percentage of time devoted to the business consistently with that shown on federal Form 1125-E for both e-file and paper returns.

California Form 3805Q - Form 3805Q Part III relating to NOL carryback is now completed when there is a current year NOL, other than a "General" NOL, and the carryback period is not waived.

Colorado Electronic Filing

A modification was made for Form 8453P to ensure Line 2 of the form shows the amount indicated on the Form 106, Line 5.

Colorado electronic filing diagnostic 45646 has been updated to reference the correct input forms that have changed.

Idaho

Form 41S, Line 32, will no longer default to a negative number.

Illinois Electronic Filing

IL Schedule B. Diagnostic 43078 has been updated to match the Illinois business rule to prevent returns from being rejected.

Iowa

Form IA 1120F. Depreciation adjustments will now flow to Page 2, Schedule A, Line 7a or 7b, and will not show in the statement for Line 8a or 8b. The year began in state line on Page 2 will now use input on Common State > State Common Data > General > Year commenced in state. Franchise tax voucher IA 1120F V now only activates for balance due returns.

Kentucky

Form 8825 now follows the federal rules for vacation home rental property depreciation.

Massachusetts

1120S State Filing Instructions. The wording in paragraph 711 was updated and a new keyword was added.

Nebraska

NE Schedule III now appears in the billing statement.

Schedule A, Line 13 C, will now populate based on input on Federal Income/Deduction - Overrides and Adjustment, Portfolio Income Overrides, and Other Portfolio Income.

New Mexico

New Mexico transmittal information will now identify "Domestic Profit Corporate Biennial Report" and instruct the preparer to use the New Mexico Web site to complete the form.

New York Electronic Filing

A New York schema validation error that occurred when a shareholder lives in a city longer than 20 characters has been resolved.

Ohio Cities

The City of Salem mailing address has been updated.

Virginia

Form 765, Line 9, and Schedule CR, Page 7, Section 5, Part 1A, will be reduced by the amount on Form CR, Page 7, Section 4, Part 1A - Total Refundable Credits.

Form VK-1Consolidated, Page 2, Line 7, will display two decimal places to prevent overlapping into Line 6 and remain consistent with the 1065 system.

Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

Federal

Printing of the description for form 8949-AMT has been adjusted.

You will now be able to use Government to Worksheet links to access the generic heading for Schedule K-1.

Exempt Organization (990) Product Updates

Return to [Table of Contents](#).

Florida

Florida F-1120, Page 2, Line L(a), now includes the contact person's telephone number and officer title from the Common State, /City Common Data worksheet, Contact Records or Contact Information section.