

CCH Axcess™ Tax  
2013-2.7 Release Notes

February 2014



**CCH Axcess™**  
*At the Center of the Firm in Motion*

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## Contact and Support Information

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Product and account information can be accessed by visiting Customer Support online at [Support.CCH.com/Axcess](http://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

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### Electronic Filing

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

#### Individual

Pennsylvania LLC, Texas, Texas Extensions

#### Partnership

Texas

#### Corporation/S Corporation

Texas

#### Fiduciary

Texas, Texas Extensions

### Tax Updates

#### Individual

Schedule A, Line 5, local sales tax, now utilizes the USPS tax table which contains a single county and place name for each ZIP code.

#### Corporation, S Corporation

An issue has been identified with the Oregon tax rates. The original instructions from the state of Oregon specified that the tax should be calculated based upon \$10 million of taxable income. However, the instructions were modified to calculate tax based upon \$1 million of taxable income. CCH Axcess Tax is currently calculating the tax based upon the \$10 million of taxable income. This has been corrected for Release 2013-2.7.

A scan is available to identify the returns that may be impacted.

Various issues for the following products are resolved with this release.

- **Individual**. Federal, Arkansas, Florida, Hawaii, Illinois, Kansas, Massachusetts, Michigan, New Jersey, South Carolina
- **Fiduciary**. Federal
- **Corporation**. Federal, California, Connecticut, Delaware, Florida, Georgia, Iowa, Michigan, Missouri, Oklahoma
- **S Corporation**. Federal, Florida, Illinois, Missouri, Mississippi, Virginia
- **Partnership**. Florida, Michigan Cities, Mississippi, New York City, Virginia

## Correspondence Manager

The 706/709 Filing Instructions and 706/709 Extensions letters are now available in Correspondence Manager.

# Tax Product Updates

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## Individual (1040) Product Updates

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### Federal

A change has been made to correct an issue where Form 114 electronic filing sometimes appears as "Not Available" in the export dialog.

Form 2848. When a Government View override is entered in Form 2848, Line 1, the override is maintained when the return is calculated.

Form 5405 SP. The statement for the credit repaid in prior years correctly prints spouse input.

Form 8801, Credit for prior year minimum tax worksheet, minimum tax credit carryover field references 2012 Form 8801, Line 28.

Form 8863. Disqualifying diagnostic 41380 issues if trying to claim both the American Opportunity credit and the Lifetime Learning credit for the same SSN.

Form 8863. Disqualifying diagnostic 47507 issues when the educational institution city input is invalid.

Form 8863. Filer's information on the Tuition Statement > IRS 1098-T section reflects changes made in the Educational Institution Information section.

Form 8889. When an HSA or MSA is marked as HSA, entries from Distributions of an HSA or MSA are picked up without additional input of number of months covered by an HDHP.

Schedule A. When input that will carry to Schedule A is entered on the Partnership Passthrough, S Corporation Passthrough, or Fiduciary Passthrough, charitable contributions entered on Itemized Deductions > Contributions remain intact.

The Maine custom filing instructions will be included in return grids with new refundable or non-refundable credits.

### Electronic Filing

Form 114. All zip codes are now stripped of spaces and hyphens to validate e-filing.

Form 1040. Disqualifying diagnostic 41368 now issues when student loan interest is entered as an adjustment to Form 1040, Line 33, for a single taxpayer and student loan interest is not allowed due to AGI and student loan interest being greater than \$75,000.

Form 1310. If the filing status is married filing joint, both the taxpayer and spouse are deceased, there is a refund on the federal return and Form 1310 is not present in the return, disqualifying diagnostic 44422 is issued.

Form 2441. Disqualifying diagnostic 47903 issues when the ZIP code of the care provider does not contain enough digits.

Form 8839. Disqualifying diagnostic 44393 issues when the adoption credit is greater than \$0 but no child information is present.

Form 8889. Disqualifying diagnostic 42799 issues for more than one Form 8889 with the same social security number.

Schedule B. Disqualifying diagnostics issue for invalid entries on Dividend Income > 1099-DIV for Hawaii, Illinois, Maine, and Ohio.

## Alabama

Alabama Schedule A, Line 20, includes expenses from Form 2106 with a code of 5 (outside salesperson).

## Alabama Electronic Filing

Diagnostic 48308 issues when the taxpayer or spouse is deceased to prevent reject AL40-015, AL40-017, AL40NR-015, and AL40-017.

## Arizona

Arizona Schedule A prints when Arizona itemized deductions are the same as the Federal Schedule A calculates, the Arizona itemized deductions are more than the standard deduction and the standard deduction is being used on the federal return.

Capital Gains Subtraction Worksheets Line 8 correctly reflects the capital gains/losses flowing through from passthroughs.

Form 140, Page 2, Line C26 (Form 140PY, Page 2, Line D34 and Form 140NR, Page 2, Line D30) no longer includes Section 179 in excess of allowable amount for current year.

## Arizona Electronic Filing

Disqualifying diagnostic 44408 issues when capital gains/losses are present on Form 140, Line 16A (Form 140PY, Line 19A, or Form 140NR, Line 19A) and capital gains/losses are not reflected on Form 140, Page 2, Lines D31 through D34 (Form 140PY, Page 2, Lines E37 through E40, or Form 140NR, Page 2, Lines E33 through E36).

Disqualifying diagnostic 44409 issues when the address is incomplete on Form 310.

## California

The paid preparer signature date no longer prints on the taxpayer signature line of Form 540 or Form 540NR.

## California Electronic Filing

Disqualifying diagnostics 48463 and 48464 issue when the taxpayer and/or spouse prior year AGI is not present.

## Connecticut

Input is available on the Connecticut Basic Data > Residency section to override the calculated answers to the CT-1040AW, Part 3, questions, Did you (or your spouse) receive income from Connecticut sources during nonresident period.

## Delaware

Mortgage Insurance Premiums are included in itemized deductions from Schedule A when Delaware General worksheet, Preparation Options section, Prorate joint coded itemized deductions except state and local taxes in accordance with income field is selected.

## District of Columbia Electronic Filing

Disqualifying diagnostics now issue when required input is missing from Form 1099G.

## Indiana

Schedule A, Income, Proration and Adjustments, Lines 22b and 33b, are included in Line 36b, total.

## Indiana Electronic Filing

Disqualifying diagnostic 43941 issues when government form overrides are used.

For Form IT-40 and IT-40PNR, when Line 19d, overpayment applied to next year estimate, is greater than zero, the amount of overpayment applied to next year county estimate is included in the electronic file even if zero.

IRS Form 1099R is included in the electronic file for all appropriate cases of "FS" and "State" field combinations.

## Iowa

Form IA 1040, Lines 28 and/or 31, now include additional Medicare tax owed and/or withheld from Federal Form 8959.

## Kansas

Form K-40, resident state field, populates with 'FL' when Florida is the home state and the Florida return is not present.

Schedule S, Part A , Line 24A, includes the correct amount when income related to that field is coded S.

The Kansas custom filing instructions include credit amounts from Form K-40.

The Kansas custom filing instructions includes the Creative Arts Industry Fund contribution.

## Kentucky Electronic Filing

Disqualifying diagnostic 44405 issues when Kentucky Form 740-NP, Line 5, is 12/13/2013 and the moved to state is Kentucky.

## Maine Electronic Filing

Reject ME1040-003. When banking information is present without indicating direct debit or deposit, similar indicators will not be included in the electronic file.

The 1099-G recipient ID is included in the electronic file.

When Maine itemized deductions are present in the return and federal adjusted gross income exceeds the applicable filing status threshold, Worksheet Schedule 2, Line 2a, is included in the electronic file preventing reject ME 1040-3121 from occurring.

## Massachusetts Electronic Filing

Disqualifying diagnostic 42001 prevents export of the Massachusetts electronic return if filing status is Married Filing Joint or Separate and the spouse name and/or Social Security Number is not present.

Disqualifying diagnostic 44780 now prevents export of the Massachusetts electronic return if more than one state is present on a single IRS-W2 and combined state wages are greater than federal wages entered in box 1 unless a 1 is entered in the state use box.

Disqualifying diagnostic 48400 prevents export of the Massachusetts electronic file if taxpayer insurance information is missing from Schedule HC.

Disqualifying diagnostic 48453 prevents export of the Massachusetts electronic return when the main business or product is missing from the MA Schedule C.

Disqualifying diagnostic 42040 prevents export of the Massachusetts electronic return when the Schedule Z amount report on Form 1 or Form 1NR/PY does not equal the amount on Schedule Z, or if an amount is present on the main form but Schedule Z is not present.

Disqualifying diagnostic 44442 prevents export of the Massachusetts electronic return if Spouse SSN is present but filing status is not Married Filing Jointly or Married Filing Separately.

Disqualifying diagnostic 48416 prevents export of the Massachusetts electronic return when partial information is entered for Legal Residence on a nonresident or part-year resident return.

Disqualifying diagnostic 48655 prevents export of the Massachusetts electronic return if Form 1NR/PY, Line 3, is more than 10% greater than Line 14f and no explanation statement is present.

Form MA1, Line 36, matches the electronically filed W-2 amount to prevent disqualifying diagnostic 42038.

Massachusetts electronic filing Form IRS1099R only includes a value in the first year of designated Roth contribution field when a value between 1000 and 9999 is entered.

Massachusetts electronic filing Form IRS1099R always indicates Standard unless the IRS-1099R is marked nonstandard.

Massachusetts electronic returns containing Form IRS-1099R include only the first 4 alphanumeric characters in the name control, ignoring punctuation.

Paid Preparer PTIN is forced to always start with upper case "P" instead of lower case "p" for Massachusetts electronically filed returns to prevent schema validation errors or rejections.

Schedule HC includes the date of birth for taxpayer and spouse (if Married Filing Jointly) from federal input.

Taxpayer and spouse first names are limited to 16 characters, due to electronic filing requirements, on Massachusetts Form 1, Form 1NR/PY, and Form M-4868.

The ERO Name in the Massachusetts electronic file fills with the firm name if ERO person name is not present.

Massachusetts electronic returns including Form IRS-W2 reflect standard W2 unless nonstandard is indicated.

Massachusetts electronic returns reflect materially participating for Massachusetts Schedule C unless non participation is indicated.

Per communication from Massachusetts electronic filing department, special characters "#", "[", and "]" are not allowed on Schedule HC. These characters drop from the Massachusetts electronically filed return.

The Schedule SC Betterment Rate now formats as a decimal number.

## Michigan

Form MI-4884, Column B, marks the box for deceased spouse benefits when a state code of "17" is entered on IRS 1099-R and the IRA/SEP/SIMPLE box is indicated.



Caution diagnostic 24440 issues when deceased spouse benefits have been entered on IRS 1099-R but deceased spouse information on the Michigan Income/Deductions worksheet > Subtraction section is missing or incomplete.

MI-1040CR, Line 5b, is checked when the taxpayer and spouse qualify for Lines 5a and 5b and either the taxpayer or spouse is blind and age 66 or older.

## Minnesota Electronic Filing

Disqualifying diagnostic 44406 issues when the underpayment penalty has been excluded from Form M1.

## Mississippi

Form 80-105, Line 13, fills with a zero when there is no Mississippi Adjusted Gross Income.

## Mississippi Electronic Filing

Disqualifying diagnostic 47669 issues when Form 80-108, Part 4, does not match Form 80-105, Line 38, or Form 80-205, Line 39B.

Disqualifying diagnostics 48037 and 48047 issue when the amount of itemized or standard deductions listed on Forms 80-105 or 80-205 do not match the amount listed on Form 80-108.

Disqualifying diagnostics 48040 and 48041 will no longer issue. These diagnostics are now obsolete.

Mississippi electronic file fills the spouse's last name with the taxpayer's last name if the spouse's last name is not entered and the filing status is Married Filing Joint.

## Missouri Electronic Filing

Diagnostic 41127 issues when the amount on Form MO-1040, Line 10 does not equal the applicable amounts on Federal Form 1040.

## Montana

Montana Worksheet IV, Line 1, includes DPAD in the federal adjusted gross income from Form 2, Line 38.

## Nebraska Electronic Filing

Diagnostic 41463 will issue when school district information is/is not present based on residency on Form 1040N.

Diagnostic 43816 issues when the amount on Form NOL, Line 28, does not equal the detailed amounts on Line 28b. This prevents reject FNOL-0069.

Diagnostic 43889 issues when an amount is present on Form 1040N, but Form NOL is not present in the return.

Diagnostic 43919 issues for Form 1040N, Line 55, when the total amount does not equal the detailed amounts.

Diagnostic 44391 issues when either the use tax amount or the local code is missing on Form 1040N.

Diagnostic 44392 issues when an amount is present on Form 3800N, Lines 4 through 9, but Line 1 equals zero.

Diagnostic 49308 issues when an amount of \$0 has been entered on Form 1040N, Schedule III, Line 77b, and no description is present.

Paid preparer information is not included in the electronic file when using the 'Employee Benefit' option.

## New Mexico Electronic Filing

Disqualifying diagnostic 44411 issues when Form RPD41272, Line 2, is negative.

## North Carolina

When the estimated deductions from federal adjusted income are entered, Form D-40, Line 4 equals to the current year deductions adjusted by the deductions entered. If no adjustment is made and estimated federal adjusted gross income changes, the estimated deduction amount includes the 2014 tax changes.

## Ohio

OH SD-100. The Senior Citizen Credit will no longer be limited by the amount of tax due.

## Ohio - Ohio Cities

Form 37. When the option to suppress Schedule K is selected for a work city, the amount of direct payments attributable to wages under withheld that would normally be calculated on Schedule K will be properly removed from the amount on Page 2, Line 4b, as well as the Schedule K.

Mason (MA19) Resident Homeowner Credit may now be requested on Ohio Cities > Independent - General From R with a code of 1 in the Code field. The description, percentage, and option to reduce credit for taxes paid will automatically fill for the credit.

Other income and deductions input on the Ohio Cities > Income / Deductions will now flow to returns for Indian Hill (IN02) and Wyoming (WY01).

## Oklahoma

Form 511NR, Schedule NR-1, Line 15, Other Income, now includes state winnings entered on IRS W-2G.

## Pennsylvania - Pennsylvania Cities

Form CLGS-32-1, Line 15, calculates when a refund is applied to estimated taxes.

## Pennsylvania Electronic Filing

Disqualifying diagnostic 44396 issues when there is an amount on PA-40, Line 1b, but Schedule UE is not present in the return.

## Rhode Island

Form 1040H, Line 21, will bring the appropriate amount from either Federal Form 1040, Lines 15 and 16.

## Tennessee

The Tennessee Department of Revenue phone numbers print in the special instructions on Form FAE 170.

## Tennessee Electronic Filing

Disqualifying diagnostic 43182 issues when the return has been selected for electronic filing and no banking information has been entered for direct debit.

Disqualifying diagnostic 44004 issues when a Tennessee Department of Revenue assigned account number is missing or is invalid on Form 170.

## Vermont

The state 8960 is generated only if state tax is present on Schedule A and itemized deductions were taken.

## West Virginia

Dividends reported on Form IT-140 are also included on Form IT-140W.

## Wisconsin

The amount of Schedule MA credit is now included in the payments total of the custom filing instructions.

The standard deduction head of household calculation for income range 41,795 - 41,999 now matches the printed table.

## Wisconsin Electronic Filing

Form W-RA, Schedule MA box, is only checked when Schedule MA contains passthrough amounts.

## Partnership (1065) Product Updates

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### Federal

Schedule M-1. Schedule M-1, Line 4, no longer deducts amortization twice from personal rental expenses.

The ending accumulated depreciation column on the detail report takes into consideration negative current depreciation amounts in its calculations.

The state estimate paragraphs have been updated to properly reflect a form with only one payment voucher instead of quarterly payments when the option for the accountant to retain the vouchers is selected.

### Direct Deposit/Debit Report

The Direct Deposit/Debit Report will now include direct debit extension amounts.

### Electronic Filing

The diagnostic override code is now cleared from input after calculation.

The required return only message no longer appears when the return configuration set option is changed.

### Alabama

Alabama Schedule K-1, Line M2, has been updated to account for ##### showing when there is no income on AL 1065, Schedule D, Line 7.

### California

Form 3522 is now listed as Form 3522 LLC Tax Voucher on the cover letter.

Form 3522 now displays as 2014 on the cover letter.

If present, Schedule EO will print when the LLC is a disregarded entity.

Schedule IW, Line 9c, now includes the total of Lines 9a and 9b.

### Illinois

An update was made to IL 1065, Line 55, to carry the correct amount of recapture from Form 4255.

### Kansas

Kansas - KW-7A the year referenced in Part B is now 2013.

### Kentucky

Schedule LLET-C, Line 5, will now foot.

### Maryland Electronic Filing

Disqualifying diagnostics for partner names no longer validate for the length of the name. The name is now automatically shortened by the program to the appropriate length.

## Massachusetts

MA 3, Line 17. An amount will no longer pull when Line 16 is empty.

## Massachusetts Electronic Filing

Form M-8453CR no longer prints when the state is disqualified for electronic filing.

## Michigan

Form 807, Line 17, Exemption Allowance from Line 47 has been revised to not include an amount when there is a loss present in the return.

Form 4918, Page 1, Lines 11a and 11b, Allocated or apportioned income attributable to another flow-through entity, will now be limited to the amount shown on Lines 8a and 8b subtractions respectively.

## Mississippi

Form 84-105, Page 3 officer's social security number now includes 9 digits. Electronic filing Schema Version is now updated to 2013V5.0.

## Ohio

OH IT-1140, Page 2 Line 2a, and OH IT-4708, Page 3, Lines 34 and 42, will now calculate amounts using the federal amount \* fraction checked unless overrides are entered.

## Oregon

Schedule K-1 Equivalent will print.

Schedule K-1, PTE Oregon apportionment percentage will be equal to Schedule AP-1, Line 22, for resident partners.

## Tennessee

See Statement message for Sch J, Line 21, will now print on Line 21. The heading for the Sch J, Line 21, statement will now say Other Expenses.

## Wisconsin

Form PW-1 letters and filing instructions will reflect requests made for direct deposits or direct debit payments.

# Corporation (1120) Product Updates

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## Federal

Contribution carryover from current year excess contribution does not show any amount used when there is carryover from prior year that contain amounts used in the prior year.

Form 114A is updated to fill the preparer signature line when that option is chosen.

## Direct Deposit/Debit Report

The Direct Deposit/Debit Report will now include direct debit extension amounts.

## Electronic Filing

Diagnostic 47995 will issue to prevent a return stopped for schema validation when an invalid percentage is entered on Form 1120, Schedule K, Line 7(i).

Diagnostic 49331 will now issue when an invalid Zip Code is entered for the state of Arkansas.

Form 1120 in the electronic file will no longer check the consolidated check box when it is not included on the paper Form 1120.

Form 114. The filer, preparer, financial institution, and account owner ZIP/Postal codes will have any disallowed spaces removed to prevent electronic filing rejects.

Returns requesting Form 1120F processing but are calculating Form 1120 returns will no longer stop for schema validation error.

Returns will no longer stop for schema validation error when Form 5472 reporting corporation shows United States, US, or USA as the country name.

Returns with PDF attachments that previously exported an extension and the returns are being exported without calculation will no longer stop due to a PDF error.

The non paid preparer codes have been updated for electronic filing.

Diagnostic 46407 has been updated to issue when the tax year ending date is the current date.

## Electronic Filing - 2220

Diagnostic 44562 will now issue when there are negative amounts on Form 2220, Schedule A, on lines that do not allow negative amounts.

## Alabama Electronic Filing

Form 20C, Schedule A, Line 1 - State and local income taxes. The PDF required by Alabama will now be automatically generated when this line is present in the return.

## Alaska Consolidated

AK - Form 6385, Line 1, no longer includes the amount entered at the consolidated level.

## California

The AMT version of Form 3805Q will now fill the check box to indicate the NOL carryback has been waived when that option is selected.

When there is a current year Eligible Small Business NOL or a current year New Business NOL, and the option to carry the NOL back is chosen, Part III of Form 3805Q will now be properly filled out.

## Florida Electronic Filing

Diagnostic 49000 will no longer appear when required input for Florida is present at the subsidiary levels.

## Illinois

IL-1120, Step 2, Line 1, Federal Taxable Income, and Line 2, NOL (net operating loss deduction) will use amounts from federal forms filed other than the regular 1120.

## Indiana

Diagnostic messages related to Forms EDGE and EDGE-R will no longer issue if these forms are not included in the return.

## Kansas

Kansas, Transmittal Letters. ZIP codes now show 66612-1588.

## Kentucky

Form 720, Page 2, email address will default to the preparer's email address.

## Maryland Electronic Filing

The Maryland ERO record has been revised not to include a direct debit date when the return is a refund return.

## Michigan

Form 4891, Line 41 (Tax Liability after Small Business Alternative Credit), will now show 0 (zero) if the amount calculated is \$100 or less.

## Michigan Electronic Filing

The printed Government copy of the electronically filed Michigan CIT return will now include only the applicable forms that were not electronically filed.

## Minnesota

Electronic filing transmittals and filing instructions now reflect partial payments entered in the return.

## New York City Electronic Filing

The batch extension form address fields will now display foreign addresses. The status system 'ElectronicDebitDepositAmount' column will display a zero when filing a batch extension.

## North Dakota Electronic Filing

North Dakota electronic filing has been revised not to issue a disqualifying diagnostic when a debit date is not entered on Form BNK-1. North Dakota will now accept the current date as the default debit date if a debit date is not entered on Form BNK-1.

## Oregon Electronic Filing

Diagnostic 47844 will now issue if Form 20, Line 14, or Form 20-INS, Line 20, has net loss deduction or net capital loss deduction available for the current year even if the client is not able to take the losses in the current year. The line will print 0 and a statement will produce showing the losses available. This state will need to be attached as a PDF when electronically filing the Oregon return.

## South Carolina

The extension letter and filing instructions for Form SC1120-T - Application for Automatic Extension will no longer indicate that a signature is required.

## Texas

Texas will use the overrides when entered if there is a Federal 1120-H return.

## Virginia

Form 500CR, carryover credit to next year lines. Disqualifying diagnostics have been removed from these lines to allow you to enter a government form override of zero when the credit has now expired. This will prevent an expired carryover amount from being rolled forward to the next year.



## S Corporation (1120S) Product Updates

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### Federal

Depreciation and Amortization (Form 4562) > General section is now automatically being generated for North Carolina when there is excess Section 179.

Form 1125-E has been updated to include gross income from rental into the consideration to automatically produce Form 1125-E.

The total line for net income before depletion on the shareholder landscape depletion summary schedule has been updated to reflect the proper amount.

### Direct Deposit/Debit Report

The Direct Deposit/Debit Report will now include direct debit extension amounts.

### Alabama

Form Schedule K-1, Line AB, Alabama exempt income statement, will now display the correct amount.

### Alabama Electronic Filing

Disqualifying diagnostic 44337 will now issue when zero has been entered for Alabama Schedule K-1, Part II, Line I - Owner's/Shareholder's percentage of profit and (loss) sharing.

Disqualifying diagnostic 44511 will now issue for Alabama Business Privilege tax returns where zero percent apportionment has been selected and a PDF has not been attached showing the explanation of the apportionment factor.

### Arizona

Form 1040 NR white paper statements has been updated so the partner name is not included twice.

### California

Form 100S, Page 2, Line 33 withholding credits, will now be included in total payments on Line 35. Previously, they were only included in determining the balance due.

Form 3533 - Change of Address is now properly completed.

### California Electronic Filing

California reject SCHR-090 regarding the requirement of Schedule R, Side 1, Line 18a [ApportionmentPercentage] equaling the Schedule R-1, Line 5 [ApportionmentPercentage] amount has been resolved.

### Georgia Electronic Filing

Diagnostics 49132 and 49134 no longer issue due to rounding of amounts.

## Illinois

Form IL-1120-ST, Line 53, Recapture of Investment Credits. This amount will now equal to the amount shown on Column 3, Line 18, on the last Illinois Schedule 4255 when no override is used.

## Kentucky

Fiscal year dates are corrected on Form 740NP-WH.

## Kentucky Cities

Lexington Form 228, Lines 16 and 17, will react to overpayment input.

## Massachusetts

Massachusetts Schedule S, Line 16, will now calculate when there is an amount on Line 14 and no amount has been entered for aggregate receipts on Line 15.

## Michigan

Form 4918, Page 1, Lines 11a and 11b, Allocated or apportioned income attributable to another flow-through entity, will now be limited to the amount shown on Lines 8a and 8b subtractions respectively.

## Minnesota

Foreign addresses in the electronic return file will now reflect the foreign address entered in the return. Electronic filing diagnostics 43444 and 43039 will now disqualify the return for missing address information required for electronic filing.

Schedule KS statements for addition and subtraction modifications due to nonconformity for Lines 8 and 11 will now show the description entered with the amounts.

## Mississippi

Form MS8453-PTE paid preparer's information now prints when required for all electronically filed return situations. Electronic filing Schema Version is now updated to 2013V5.0.

## Nebraska

The date signed by preparer on the 1120SN and 7004N will populate automatically when the return configuration set option is selected.

The E-Mail Address, Title, and Phone Number in the "Sign Here" section are now overridable through input on Common State>General Information>Lines 18 (Telephone number - override), 25 (E-mail address or website - override) and Common State>Corporate Records or Contact Information>Line 4 (Contact or signor's title - override).

## New Jersey Electronic Filing

Diagnostic 46871 now clears when the asset is land or Section 179 carryover.

## New York

Form DTF-621 has been updated to calculate Part 3 when Line 7A is equal to YES.

## New York City Electronic Filing

The batch extension form address fields will now display foreign addresses. The status system ElectronicDebitDepositAmount column` will now display a zero when filing a batch extension.

## Ohio

Form IT 1140, Page 2, date signed by pass-through entity officer or agent line, will not be filled when a date is entered in General > return options > preparer information, date signed by preparer.

## Ohio Cities

The City of Dayton's mailing address has been updated.

## Oklahoma

Form 512-S, Page 4, Part 5, Line 8, will only print 'See Attached Schedule' when there is credits or withholdings included for the Shareholders.

## Oregon

Oregon Form 20S, Page 2, Schedule SM, Line 3, will now include depreciation add-back if the Oregon depreciation schedule has a depreciation difference resulting in an Oregon addition on Line 2. This addition will then flow to the Oregon Schedule K-1, Line 15, based on the shareholder percentage of ownership.

## Pennsylvania

PA40NRC has been updated to consider payments made in the calculation of the amount due.

## South Carolina Electronic Filing

Disqualifying diagnostic 47222 will now issue when an invalid state code has been entered for Form SC1120S, Schedule D, Line 7 - business address of director.

## Vermont

The federal income tax return included with the Vermont return was the complete return. This has been changed to include only the first 5 pages.

## Virginia

Form VK-1 Consolidated will print 'Applied For' when the PTE's FEIN is entered as 99-9999999

Form VK-1 Consolidated will print both Pages 1 and 2 in government view when electronic filing has been selected.

## Virginia Electronic Filing

Form VK-1. Only the printing of this form will be suppressed when Federal - General worksheet - Return options section - 'Suppress printing of Schedule K-1' = suppress state or suppress federal and state. The form will still be generated in the return consistent with federal and per schema. Additionally, the common state entry is no longer valid since the VK-1 is a state form.

## Fiduciary (1041) Product Updates

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### Federal

Additional forms will no longer be created when the number of distributions exceed four.

Nonresident state grantor letters will correctly reflect nonpassive losses from S Corporations.

The option to suppress the beneficiary letters inside Tax will now override the settings done in the return configuration sets (Federal > Beneficiaries > Beneficiary Letter > 1 - General).

Section 1250 amounts will now be properly reflected on Schedule K-1.

The Schedule K-1 code page will no longer print in the government copy of a state copy of the federal return.

### Direct Deposit/Debit Report

The Direct Deposit/Debit Report will now reflect the same debits as are shown in the diagnostic messages and Forms IT-579-PT.

### Electronic Filing

Any return receiving reject F1041-002 should be recalculated and resent on this release.

Diagnostic 44525 will now issue if Form 4952, Line 1, Line 2, and Line 8, are all equal to \$0. One of these lines must have an amount to file Form 4952 electronically.

### Connecticut

CT 2210 will no longer produce when there is a current year zero tax and a prior year tax of zero.

### Illinois

Line 30 on Schedule K-1-T will now include the portion of IL-1041, Line 6, that is tax-exempt dividends.

### Iowa

The Iowa Department of Revenue changed Form 6251, Line 14, so that it now pulls from IA Form 1041, Line 18, instead of Line 22.

### New York

Credits will no longer be subjected to deferral process if they exceed \$2,000,000.

Letters for IT-204-LL will be produced when required.

### New York - Electronic Filing

The disqualifying diagnostic number 44013 will not be issued if requirements of IT-205-A, Schedule 1, are satisfied.

## Rhode Island

Rhode Island tax withholding entered on passthroughs with a state use code of '1' will calculate on Schedule W as from Form 1099PT.

## Exempt Organization (990) Product Updates

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### Federal

Form CR 400 extension filing instructions will be suppressed when the option to suppress filing instructions is entered in Filing Instructions and Cover letter > Extension filing instructions option.

The state filing instructions will be included in the government copy when the option to include them is entered in Filing Instructions and Cover letter > Print instructions in government copy option.