

CCH Access™ Tax
2013-2.3 & 2012-5.3
Release Notes

January 2014



CCH Access™
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. 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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2013-2.3 Electronic Filing

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

Corporation

Alabama, Michigan CIT, Michigan MBT, Montana

S Corporation

Alabama, Michigan CIT, Michigan MBT

Partnership

Alabama, Michigan MBT, Montana

Individual

Alabama, Connecticut, New Mexico, Tennessee 250, Tennessee 250 Extension, Tennessee LLC, Tennessee LLC Extension, West Virginia

2012-5.3 Electronic Filing

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

Corporation

New Jersey CBT-100 for years ending after 6/30/13

S Corporation

New Jersey CBT-100S for years ending after 6/30/13

2012-5.3 Tax Updates

Corporation and S Corporation

Texas - An update has been made to the Texas program to prepare 2014 Texas Franchise tax reports for fiscal year returns. Original franchise tax reports for 2011 or 2012 filed after December 31, 2013, must be reported on 2014 forms.

You can make entries on Texas > Texas 2014 > General > Check for 2014 report year forms (Texas 2014, Interview Form TX1, Box 50). The 2014 reports will not be prepared without these entries.

Individual, Corporation, S Corporation, Partnership

New York City - Filing addresses have been updated for various New York City forms. New filing addresses are reflected on these forms as well as the filing instructions: NYC-200V, NYC-1, NYC-1A, NYC-3A, NYC-3L,

NYC-4S, NYC-4SEZ, NYC-400, NYC-400B, NYC-EXT.1, NYC-EXT, NYC-204, NYC 204-EZ, NYC-200, NYC-1127, NYC-200V-1127.

Tax Product Updates

Individual (1040) Product Updates

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2012-5.3

Ohio - Ohio Cities

The following updates have been made:

- New Generic Cities*
 - ◆ Brinfield Kent JEDD (BR17)
 - ◆ Kent Franklin JEDD (KE05)
- New CCA Cities*
 - ◆ Boston TWP Peninsula JEDD (BO06)
 - ◆ Liberty Center JEDD (LI07)
 - ◆ West Liberty (WE18)
- New RITA Cities*
 - ◆ Camden (CA16)
 - ◆ Gratis (GR14)
 - ◆ Jeromesville (JE05)
- Cities moving from Generic to RITA
 - ◆ Baltic (BA01)
 - ◆ Catawba (CA14)
 - ◆ Mount Healthy (MO11)
 - ◆ New Riegel (NE21)
 - ◆ Olmstead JEDD (OL02)
- Cities with Rate Changes as of 1/1/2014
 - ◆ Barberton (BA03)
 - ◆ Kent (KE01) Macedonia (MA01)
 - ◆ Mansfield (MA09)
 - ◆ Macedonia Northfield Ctr Twp. (MA24)
 - ◆ North Robinson (NO18)
 - ◆ Peninsula (PE02)
 - ◆ Perry (PE04)
 - ◆ Shelby (SH06)
 - ◆ Spencerville (SP01)
 - ◆ Twinsburg (TW01)
 - ◆ West Carrollton (WE05)
 - ◆ Wooster (WO04)

* New city codes do not apply to Individual returns for 2012.

2013-2.3

Federal

Form 1040. When an amount is entered in Income/Deductions > Partnership Passthrough > Activity > Amounts paid for medical insurance and then removed, the amount is not included on Form 1040, Line 29 and/or Schedule A, Line 1.

Form 8839. Credit carryforward on Qualified Adoption Expenses > Carryovers is accessible.

Form 8959. Line 1 will include the Medicare wages as displayed on Wages and Salaries > IRS W-2 when the Medicare wages were autofilled, and changes were made to the input causing the wages to decrease.

"Asset details to be provided upon request" now prints in full, if requested.

California

Form 568, Page 6, Line 1b. no longer changes on each calculation.

Georgia

Form RD-1061, Section 2, Representative information, uses the city, state, zip code, and email address entered in the return configuration set.

The date field on Form RD-1061, Section 7, Declaration of representative, uses the input on Other> Power of Attorney>Representative(s)> Date.

Kansas

Income from Form 4835 will flow to Schedule S, Part A, Line A24, without doubling income. Losses from Form 4835 will flow to Schedule S, Part A, Line A6.

Kansas Electronic Filing

The Kansas Individual eFile extension is not available for Tax Year 2013, because the Kansas Department of Revenue is not accepting unlinked returns for Tax Year 2013. They are unable to process Individual eFile extensions. If you filed Federal Form 4868 with the IRS for an automatic extension to file, you will automatically receive an extension to file your Kansas return. Kansas does not have a separate extension request form. If you are entitled to a refund, an extension is not required.

To pay the tax balance due for an extension, use the Kansas Payment Voucher (K-40 V EXT) and mark the box indicating an extension payment. Mail your Kansas Individual income tax return to the following address:

INDIVIDUAL INCOME TAX
KANSAS DEPARTMENT OF REVENUE
915 SW HARRISON ST
TOPEKA, KS 66612-1588

If you do not pay the tax due (may be estimated) by the original due date, you will owe interest and penalty on any balance due.

Pennsylvania

Spouse Schedule NRK-1 picks up capital gains when K-1 is coded to the spouse or joint.

Tennessee Electronic Filing

Financial transactions are included in the electronic file for returns with a balance due.

Partnership (1065) Product Updates

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2012-5.3

Michigan MBT - Electronic Filing

Form 4763, MBT Business Tax Declaration For Electronic Filing, will begin to reference the correct amount on Line 1.

Ohio - Ohio Cities

The following updates have been made:

- New Generic Cities
 - ◆ Brinfield Kent JEDD (BR17)
 - ◆ Kent Franklin JEDD (KE05)
- New CCA Cities
 - ◆ Boston TWP Peninsula JEDD (BO06)
 - ◆ Liberty Center JEDD (LI07)
 - ◆ West Liberty (WE18)
- New RITA Cities
 - ◆ Camden (CA16)
 - ◆ Gratis (GR14)
 - ◆ Jeromesville (JE05)
- Cities moving from Generic to RITA
 - ◆ Baltic (BA01)
 - ◆ Catawba (CA14)
 - ◆ Mount Healthy (MO11)
 - ◆ New Riegel (NE21)
 - ◆ Olmstead JEDD (OL02)
- Cities with Rate Changes as of 1/1/2014
 - ◆ Barberton (BA03)
 - ◆ Kent (KE01)
 - ◆ Macedonia (MA01)
 - ◆ Mansfield (MA09)
 - ◆ Macedonia Northfield Ctr Twp. (MA24)
 - ◆ North Robinson (NO18)
 - ◆ Peninsula (PE02)
 - ◆ Perry (PE04)
 - ◆ Shelby (SH06)
 - ◆ Spencerville (SP01)
 - ◆ Twinsburg (TW01)

- ◆ West Carrollton (WE05)
- ◆ Wooster (WO04)

2013-2.3

Federal

The Current Year Increases/Decreases Reconciliation schedule now calculates when Schedule M-1 is not present.

The Section 1.1411-10(g) Election has been added. To make this election, use the Federal Elections worksheet.

California

Form 565, Line U(2), is now answered if required.

Georgia

IT-CR Composite Schedule "Adjusted deductions or Standard deduction" now calculates as the greater of a Georgia standard deduction or Federal deductions reduced by deductions not allowed by Georgia.

Michigan - Muskegon

Form M-1065, Line 11 and Line 12, now calculate as required.

Oregon

Form 65, Line 3c, no longer includes an amount when Line 3a is marked no tax due.

Pennsylvania

The calculation on PA Schedule M, Pages 1 and 2, has been updated when Section 754 Depreciation is present at the Federal level.

Tennessee Electronic Filing

Diagnostic 46459 or 54218 now issues for returns with missing or invalid account numbers to prevent the rejection of TN170-031.

West Virginia

Form SPF-100U no longer produces when tax liability is less than \$12,000.

Corporation (1120) Product Updates

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2012-5.3

California

Enhanced processing of Sec 382 NOL's. The program will now properly present multiple Sec 382 NOL's when the Sec 382 NOL's exceed the Sec. 382 NOL limitation.

California Combined

Enhanced processing of Sec 382 NOL's. The California Combined program will now properly present multiple Sec 382 NOL's when the Sec 382 NOL's exceed the Sec. 382 NOL limitation.

Georgia - Roll Forward

Georgia roll forward data for Corporations and S Corporations will now only generate Worksheet Georgia> Financial Institutions and Bank when this information existed in the 2012 return.

2013-2.3

Federal

Form 1120-PH. A tax rate of 20% is now being used to compute Schedule PH, Line 26.

Arkansas

If more than one occurrence of Form AR1100NOL is present in the return, all of the occurrences will appear in the printed copy of the return.

California

Diagnostic 27087, AMT NOL, will no longer be issued when the option to waive the NOL carryback option has been selected.

Colorado

Input is now accessible in worksheet view for Colorado > Credits > Enterprise Zone Credit Carryforward - Form DR 1366 > C/O Code.

Minnesota

The appropriate years now appear in the line descriptions in Minnesota Income/Deductions> Subtractions> Section 179 and Bonus Depreciation Addbacks.

New Jersey - Electronic Filing

The foreign address for the books is no longer allowed in the electronic file.

New York City Electronic Filing

The direct deposit refund amount will now appear in the State Elec Debit/Deposit Amt Column in the Electronic Filing Status system.

North Carolina

Form CD-405 CW, Page 2, Line 10, Other Income, Column C, will print the amount flowing up from the lower level return.

Form CD-405, Page 2, Schedule G, Line 21. The depletion statement will not generate when an override has been entered in the Federal - Income/Deductions - Business worksheet , Deductions section, Depletion - override field.

S Corporation (1120S) Product Updates

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2013-2.3

Federal

The Section 1.1411-10(g) Election has been added. To make this election, use the Federal Elections worksheet.

Alabama - Electronic Filing

PPT/CPT Business Privilege Tax Return. "Check here if paid electronically" is no longer unconditionally chosen when the return has been selected for electronic filing.

California

California - NOL carryback information will no longer print on Form 3805Q, Part III, when waiver of the carryback is elected.

Total payments on Form 100S, Page 2, Line 35, will now include overpayments of tax on Line 31.

Georgia

Form 600S, Schedule 10, Claimed Tax Credits, and Form 600, Schedule 9, Claimed Tax Credits, will now exclude Credit 115, Bank Tax Credit, when Form 900, Business Occupation Tax Return, is suppressed. Form IT-CR, Nonresident Composite Tax Return, composite income calculation will now include I.R.C. Section 179 expense in accordance with Georgia Regulation 560-7-8. Now the IT-CR Composite Schedule "Adjusted deductions or Standard deduction" is the greater of a Georgia standard deduction or "Federal deductions" reduced by "Deductions not Allowed by Georgia."

Kentucky

Cross reference is updated for Form 720S, Page 3, Line 11.

Form KY 720S, Page 2, statement for officers other than president, is now produced.

Minnesota - Electronic Filing

Diagnostic 43440 now issues correctly when the routing transit number is missing from the electronic file.

Virginia

Form 770/IP/CG, Fiscal year filer and beginning and ending tax years. The form will not check fiscal year filer or enter the beginning and ending tax year when the calendar year dates are entered in the Federal - Basic Data worksheet, General section, Fiscal year dates fields.

Fiduciary (1041) Product Updates

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Iowa

Adjusted Lines 12j and 12k of Form 6251 to be subtracted from the sums of Lines 12a through 12i.

Estate & Gift (706/709) Product Updates

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Connecticut

Form CT-706/709, Schedule B, 2012 line fills if there are 2012 Connecticut entries on the Gift Tax > Gifts from Prior Periods worksheet.

Exempt Organization (990) Product Updates

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2013-2.3

Federal

The cover letter now prints in mixed case.

The custom filing instructions for the following state annual reports AZ, IL, IN, MA, MN, NJ, and PA now appear in the printed PDF copy.

Indiana

Form NP-20 address block now shows foreign province, country, and postal code when entered on the Federal >General worksheet, Basic data section.

Indiana Form IT-20NP, Line 15, now multiplies Line 14 by the tax rate instead of Line 12.

Indiana IT-20NP Schedule E, Part II, can now be completed using the Indiana Income/Deductions worksheet, Business Location and/or Sales and General Questionnaire section.