

CCH Access™ Tax
2015-5.6 Release Notes

March 19, 2017



CCH Access™
At the Center of the Firm in Motion

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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 find Support calendars, as well as options to enter Web tickets 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, Pro Forma/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 2015-5.6

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Tax Updates

Fiduciary

The following roll forward issues are resolved:

- Federal. The CUSIP number rolls forward to the correct field on Income > Interest.
- Maryland. Local tax is now included in the prior year tax amount on Maryland > Underpayment Penalty Information > Exception B - prior year tax.
 - ◆ Our Update Pro Forma feature is now available for this issue, which allows you to choose to update your previously rolled forward fields. To do this, open your current year Maryland return and choose to roll forward the corrected prior year tax amount.
- Oklahoma. Prior year overpayment applied now sources from Form 513, Line 35, or Form 513NR, Line 39.
 - ◆ Our Update Pro Forma feature will be available for this issue with Release 2016-3.2, scheduled for Sunday, March 26, 2017.

Fiduciary (1041) Product Updates

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Federal

Maryland local tax will be included in the prior year tax amount on Maryland > Underpayment Penalty Information > Exception B - prior year tax.

The Tax-exempt bond CUSIP number on the IRS-1099INT input will now roll forward to the appropriate field.

Oklahoma

Oklahoma Forms 513 and 513NR. Prior year overpayment applied will now roll forward to the Payments/Penalties > Payments > State Estimated Tax Payments > Prior year overpayment applied field and will be coded to Oklahoma.