

CCH Access™ Tax
2020-2.1
Release Notes

January 17, 2021



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 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 2020-2.1

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Tax Updates

All Systems

Consolidated Appropriations Act - Software changes are ongoing and will be available on future releases.

Corporation

Roll Forward - The option to “Print last 4 digits of SSNs on Form 1125-E” is now included in the correct input field.

Electronic Filing Updates

Individual

1040 electronic filing will be available when the IRS provides a production schema and announces an opening date.

Partnership and S Corporation

Section 199A Activities - The current production schemas from the IRS for Schedule K-1 of Form 1065 and Form 1120S require all Section 199A activities reported on Schedule K-1 to be classified in one of three specific categories. If they are not included with a category of Publicly Traded Partnership, Specific Service Trade or Business, or Aggregated, the return will not pass validation per the current production schema. Partnership and S Corporation returns with Section 199A activities in the return will receive a disqualifying diagnostic and not be allowed to export if they are not categorized as one of these three specific categories. We are seeking clarification from the IRS on how to present this for returns that do not fall into the specified categories in the current schema.

Approved Products Available on this Release

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

Corporation

California	Maryland Extension	New York Combined Extension
California Extension	Mississippi	Oklahoma
California Form 199	Mississippi Extension	Oregon
Colorado	Montana	Pennsylvania
Hawaii	New York	Pennsylvania Extension
Idaho	New York 204-LL	Wisconsin
Maine	New York Extension	
Maryland	New York Additional Extension	

S Corporation

California	Mississippi Extension	Pennsylvania Composite
California Extension	New York	Pennsylvania Composite Extension
Colorado	New York 204-LL	Pennsylvania Extension
Hawaii	New York Extension	Pennsylvania RCT-101
Idaho	New York Additional Extension	Pennsylvania RCT-101 Extension
Maine	Oklahoma	Wisconsin Composite
Maryland	Oregon	Wisconsin PW-1
Maryland Extension	Oregon Composite	
Mississippi	Pennsylvania	

Partnership

Federal	Mississippi	Oregon Tri-County
Arizona	Mississippi Extension	Pennsylvania
Arkansas	New Jersey	Pennsylvania Composite
Arkansas Composite	New Jersey CBT	Pennsylvania Composite Extension
Arkansas Composite Extension	New Jersey CBT Extension	Pennsylvania Extension
Arkansas Extension	New Jersey Extension	Pennsylvania PA-65 Corp
Colorado	New York	Tennessee
Idaho	New York 204-LL	Tennessee 188
Iowa	New York 204-LL DE	Tennessee 250
Kansas	Oklahoma	Utah
Maine	Oregon	Wisconsin Composite
Maryland	Oregon Composite	Wisconsin PW-1
Maryland Extension	Oregon Lane County	

Fiduciary

Federal	Illinois	Pennsylvania
Federal Extension	Iowa	Pennsylvania Extension
FBAR (Form 114)	Kansas	Tennessee
Arizona	Maine	Tennessee Extension
Arizona Extension	Minnesota	Utah
Arkansas	Mississippi	Utah Extension
Arkansas Extension	Missouri	Virginia
Colorado	New Jersey	West Virginia
District of Columbia	New Jersey ESBT	Wisconsin
District of Columbia Extension	New Jersey Extension	Wisconsin Closing Certificate
Idaho	Oregon	Wisconsin Passthrough Entity

Employee Benefit Plan

Form 5500	Form 8955-SSA
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Issues Resolved

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The following issues were resolved with release 2020-2.1:

Individual

Customers receive an electronic filing upload error when exporting a return that contains a PDF attachment.

C Corporation (1120) Consolidated

- Return is producing “Error Creating Efile Zip Package” when trying to export a return.
- Customer receives “No Efile was Generated” error when trying to export a return.

Illinois Partnership

Form IL-477, Replacement Tax Investment Credits does not exclude decimals during the export of the Illinois return as required.

Individual Roll Forward

- Some Invoice Option template data is not populating in current year return if the option to “Use template data instead of roll forward data” not checked.
- Data missing or in different place when using a template with the “Override Pro forma data with template data” option in Return Configuration Sets.

Exempt Organization Roll Forward

Data missing or in different place when using a template with the “Override Pro forma data with template data” option in Return Configuration Sets.

S Corporation Roll Forward

Data missing or in different place when using a template with the “Override Pro forma data with template data” option in Return Configuration Sets.

Fiduciary Roll Forward

Data missing or in different place when using a template with the “Override Pro forma data with template data” option in Return Configuration Sets.

Tax Product Updates

Corporation (1120) Product Updates

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Federal

Form 1139, Line 1a, Net Operating Loss, now carries from Other > 1139 > Net Operating Loss - Override without completing Form 1139, Lines 11-29 "Computation of Decrease in Tax".

Electronic Filing

Diagnostic 49000 no longer issues without any other electronic filing disqualified diagnostics.

Fiduciary (1041) Product Updates

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Federal

Form 8990, Line 13 will now automatically include the income distribution deduction before 8990 limitations.

New York

Estimated tax rates have been updated for 2020.

Estate & Gift (706/709) Product Updates

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Federal

When a template is rolled forward, if no entry has been made in the Gifts from Prior Periods > Amount of taxable gifts field in the template, the field prints as blank instead of 0.