

CCH Axcess™ Tax
2018-5.4
Release Notes

February 2, 2020



CCH Axcess™
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 Axxess 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 Axxess™ 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 Axxess Tax releases: [Release Notes](#).

Visit the [Application Status](#) Web page to view the current status of our CCH Axxess 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 Axcess™ 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 Axcess™ Tax Release Notes for the current year and for prior years, visit the [Release Notes](#) page on our Customer Support site.

Highlights for Release 2018-5.4

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2018 Tax Updates

Individual

Consolidated Appropriations Act of 2020 - Form 8917, Tuition and Fees, is also available.

2018 Electronic Filing Updates

Individual

The IRS has updated to a new schema version for tax year 2018 returns. On Monday, February 3, 2020, all federal 1040 returns must be recalculated and re-exported. Due to federal validation on the state side, both California and Nebraska returns also will be affected.

Fiduciary

The IRS is rejecting returns with Form 965 present. A new schema is expected, but a release date has not been provided by the IRS.

Tax Product Updates

Exempt Organization (990) Product Updates

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Federal

The Qualified Business Income Deduction has been updated to carry to Form 990T Page 2, Line 37 instead of Form 990T Page 1, Line 38.

Estate & Gift (706/709) Product Updates

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Federal

To override the addressee in filing instructions and cover letters, use General > Letters and Filing Instructions > Filing Instructions and Cover Letter > Addressee - Overrides. To override the addressee in transmittal letters, use General > Letters and Filing Instructions > Transmittal Letter > Addressee - Overrides.

New York

The following final New York State forms are available for dates of death in 2019:

- Form ET-130
- Form ET-133