

CCH Access™ Tax  
2014-5.8 Release Notes

February 21, 2016



**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](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 is 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.

## Information in Tax Year 2014 Release Notes

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CCH Access™ Tax Release Notes inform you of the enhancements and updates that have been made to Tax products and systems with the current release.

The updates 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 2014-5.8

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### 2014 Tax Updates

#### Individual

Form 1099R foreign and state information and Form 1095-A shared allocation data now roll forward.

#### Partnership

Our Update Pro Forma feature is now available to roll forward the Entity(First) and Last Name and the Name Continuation entries for partner information that were misaligned when executing the Update Pro Forma feature for the beginning capital account balance of the partners'.

We will alert you when any affected return is opened, and provide an option to add this information to the 2015 return.

#### Pro Forma Federal (Included with Release 2014-5.7)

Worksheet Federal > Income/Deductions > Partnership Passthrough now rolls forward when a passthrough entity that is a Limited Partner or other LLC Member is present.

### Electronic Filing

#### Corporation and S Corporation

Electronic filing is now available for New Jersey fiscal year returns.

## Tax Product Updates

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### Estate & Gift (706/709) Product Updates

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#### Federal

For estates filing Form 8971 and Schedule(s) A, until transmittal letters and filing instructions are added, a diagnostic is issued containing instructions for when and where to file.