

CCH Access™ Tax  
2014-5.9.2 Release Notes

April 24, 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 2014-5.9.2

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### Tax Updates

#### Estate & Gift

The following new options are available to prepare Form 8971, Information Regarding Beneficiaries Acquiring Property From a Decedent:

- Overrides for the asset description for Form 8971 purposes
- Overrides for the percent/amount of an asset that carries to Form 8971

## Tax Product Updates

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

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#### Federal

An option is available to not carry property data from the Gross Estate worksheets to Form 8971.

For each asset, an option is available to override the beneficiary's percent or amount that carries to Form 8971. Use this option to include the property that could be used to fund the beneficiary's distribution on that beneficiary's Schedule A.

For each asset, an option is available to override the description that carries to Form 8971.

When *Do not include on Form 8971* is selected for a Form 706, Schedule E, Part 2 asset, the asset does not carry to Form 8971.