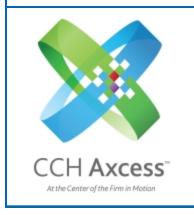
CCH Axcess™ Tax 2019-2.1 Release Notes

January 12, 2020



Contact and Support Information	2
Information in Tax Release Notes	3
Highlights for Release 2019-2.1	4
Tax Updates	4
Electronic Filing Updates	4
CCH Axcess DataScan	6
Tax Product Updates	7
S Corporation (1120S) Product Updates	7
Partnership (1065) Product Updates	8

Contact and Support Information

Return to Table of Contents.

Product information can be accessed by visiting Customer Support online: CCH Axcess 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 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 <u>Application Status</u> 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 open a Support case or chat with a representative for assistance.

Information in Tax Release Notes

Return to Table of Contents.

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 2019-2.1

Return to Table of Contents.

Tax Updates

All Systems - PTIN Verification (Included with Release 2019-2.0)

As part of the ongoing IRS security rules, all PTINs must be verified for accuracy. The verification process takes place only one time and will not apply to future logins.

PTINs can be verified through:

- Initial login to Tax
- Staff Manager
- Return Configuration Sets > Signature Block
- Return Configuration Sets > Electronic Filing Options > General > Electronic Return Originator Overrides

If a user logs in without confirming their PTIN, they will be required to confirm their PTIN on subsequent logins. Users who do not have a PTIN saved with their staff profile in Staff Manager will not receive the confirmation PTIN message when they log in.

Warning and electronic filing diagnostics have been added to alert preparers that their PTIN has not been verified, depending on whether the return is being electronically or paper filed.

New Support Chatbot

We are excited to launch a Support Chatbot that will help ensure you have a better experience using CCH Axcess Tax. This new tool allows you to receive a quick answer to a question about a form while working in a tax return by clicking the "Ask a question" button at the top of the ribbon. Enter your question, and the virtual representative uses your login credentials to provide an answer to the specific tax year, product type, and form that you are working on. This feature is available for all tax years.

All Systems - Consolidated Appropriations Act of 2020

Those provisions of the Consolidated Appropriations Act of 2020 that can be implemented without IRS action will be available on Release 2019-2.2, scheduled for January 19, 2020. Returns with these provisions will have updated calculations, but will continue to be unavailable for electronic filing, pending IRS changes. The IRS is yet to announce plans regarding availability of either updated forms and electronic filing schemas for tax year 2018 or tax year 2019.

Note: Please note that returns, particularly state returns, will need particular scrutiny regarding these federal law changes.

Electronic Filing Updates

We will begin accepting returns in advance of the January 27, 2020, IRS open for Individual returns. Returns involving the recently passed Consolidated Appropriations Act of 2020 or other open items will continue to disqualify, but qualified returns can be uploaded and released, and will be transmitted to the IRS on January 27, 2020.

Approved Products Available on this Release

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

Individual

Federal Colorado Extension New York Extension
Federal Extension Hawaii New York Form IT-210

FBAR (Form 114) Iowa Ohio
Arizona Kansas Oklahoma
Arizona Extension Maryland West Virginia

New York

Corporation

Colorado

FederalMaineTennessee 188ArkansasMarylandTennessee EstimatesCalifornia ExtensionMontanaTennessee Extension

Colorado New Mexico Utah

District of Columbia North Carolina Extension Utah Extension

IowaNorth DakotaKansasPennsylvaniaKentuckyTennessee

S Corporation

Federal Kentucky Pennsylvania RCT-101

Virginia

Arkansas Maine Tennessee
Arkansas Composite Maryland Tennessee 188
California Extension Missouri Tennessee Estimates
Colorado New Mexico PTW-D Tennessee Extension

District of Columbia North Carolina Extension Utah

lowa North Dakota Utah Extension

Kansas Pennsylvania

Partnership

Federal New Jersey Tennessee
Arkansas New Jersey CBT Tennessee 188
Arkansas Composite New Jersey Estimates Tennessee 250

Colorado New Mexico Tennessee 251 Extension
District of Columbia New Mexico PTW-D Tennessee Estimates
Iowa North Dakota Tennessee Extension

Kansas Oregon Utah

Kentucky Oregon Composite Utah Extension

Maine Oregon Lane County Virginia

Maryland Oregon Tri-County Missouri Pennsylvania

Exempt Organization

Federal Florida Extension

CCH Axcess DataScan

You can now create queries and scan 2019 returns. System defined keywords and scans for 2019 will be available on this release.

Tax Product Updates

S Corporation (1120S) Product Updates

Return to Table of Contents.

Federal

On the Analysis of Shareholder's Loan Accounts, the Loans Made During Year column will now factor in to the calculation for the Gain from Loan Repayment. The new calculation of column K is now (Column(C) minus Column(F)) divided by (Column(B) plus Column(E)) multiplied by Column(J).

We are currently awaiting guidance from the IRS regarding how aggregated 199A amounts should be reported on the shareholder's return. Without a more definitive answer, aggregated Sec 199A activities will not be included in the export of Schedule K-1 Information to other returns. We will have this information included in the export on a later release.

Partnership (1065) Product Updates

Return to <u>Table of Contents</u>.

Federal

We are currently awaiting guidance from the IRS regarding how aggregated 199A amounts should be reported on thepartner's return. Without a more definitive answer, aggregated Sec 199A activities will not be included in the export of Schedule K-1 Information to other returns. We will have this information included in the export on a later release.