

CCH Access™ Tax
2020-5.9.1
Release Notes

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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 2020-5.9.1

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Tax Updates

Individual

Form 8915-E. Lines 9 and 17 now roll forward to IRAs, Pensions and Annuities (IRS 1099-R) > 8915F - Qualified Disaster Retirement Plan only when there is an election to spread the taxable amount over three years. Roll Forward on the Fly will be available to adjust these amounts directly in Tax Year 2021 returns on a future release.

Corporation/S corporation

Corporation to S Corporation Roll Forward no longer fails when the following fields are present in 2020:

Federal > General > Return Options >:

- Use date return filed override for federal return on return summary
- Last 4 digits of SSNs on Form 1125-E
- State deduction schedule

Federal > Common State/City > Allocation/Apportionment > Property Factor > Detail > City Information > Albion > End of Year

Electronic Filing Updates

Approved Products Available on this Release

The following products are approved and available on this release:

Individual

Kentucky Amended

S Corporation

Ohio - Fiscal year Electronic Filing is available

Tax Product Updates

Individual (1040) Product Updates

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Federal

Form 8915-E. Lines 9 and 17 now roll forward to IRAs, Pensions and Annuities (IRS 1099-R) > 8915F - Qualified Disaster Retirement Plan only when "Elect not to spread the taxable amount over three years" is not checked.

S Corporation (1120S) Product Updates

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Ohio

Ohio electronic filing for fiscal returns ending in tax year 2021 is available.

Fiduciary (1041) Product Updates

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Federal - Foreign Financial Assets

An account number will populate on Form 8938, Part V if it had not prior to this release.