

CCH Access™ Tax  
2021-2.7  
Release Notes

February 25, 2022



**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 2021-2.7

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We will release CCH Access™ Tax version 2021-2.7 on Thursday evening, ahead of our regularly scheduled weekend release.

Version 2.7.1 will be released during our standard, weekend release time on Saturday evening. Please look for a separate CCH Software News and Release Notes for version 2.7.1.

### Tax Updates

Updates related to the Two Year Comparison remain in process. We project final updates will be released no later than Sunday, March 6, 2022.

### Corporation, Fiduciary, Individual, Partnership, S Corporation, and Tax Exempt

Form 3115 - New change codes 249 and 256 - 263 are available for Form 3115, Part I, Line 1a.

### Electronic Filing Updates

#### Approved Products Available on this Release

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

#### Individual

Connecticut

North Carolina Extension

#### Corporation

Vermont

Vermont Consolidated

#### S Corporation

Connecticut\*

South Carolina\*

#### Partnership

California

Connecticut\*

#### Fiduciary

Massachusetts

Massachusetts Form 2G

North Carolina Extension

Massachusetts Extension

North Carolina

\* Released in 2021-2.6.1

## Batch Electronic Filing of Extensions

Batch electronic filing of extensions is available on this release for the taxing authorities listed below.

To process your e-file extensions, go to Batch Manager > New Job > Electronic Filing > Extensions.

### **Individual**

North Carolina

### **Fiduciary**

North Carolina

## Tax Product Updates

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### Individual (1040) Product Updates

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#### Federal

**Schedule H worksheet 3, line 2e(i) and worksheet 4, lines 2a(iii) and 2f(iii)** have been updated with the correct line references per recent IRS communication.

#### North Dakota

**ND-1, Line 15** will populate without regard to any AGI limitation.

 **Note:** This was originally fixed in 2021-2.6.1.

#### Oregon

Federal amounts for code 308 no longer flow to Form OR-ASC-NP.

 **Note:** This was originally fixed in 2021-2.6.1.

## S Corporation (1120S) Product Updates

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### Maryland

The letters and filing instructions will no longer show the underpayment as a balance due amount when the entire overpayment is applied to next year's estimates.

### New Jersey

**CBT-200-TS** reflects the correct due date in all cases in the filing instructions.

**Form PTE, Line 1, Distributive Proceeds, Diagnostic 19211** now refers to Line 23 of the Worksheet for the Calculation of Distributive Proceeds.

### Ohio

The check box to verify payments on the OH IT 1140/IT 4708 worksheet, Form IT 4708 General Information section is now accessible.

## Partnership (1065) Product Updates

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### Federal

**Schedule K-3, Pages 2, 3 and 4** will generate with Part I, Box 9 checked when the override entry is present on Foreign > Schedule K-2 - Distributive Share Items - International Parts I-V > Schedule K-2 General Information and Part I > Line 13 - Attaching information from other forms.

### California

**Form 3832** will now print in the K1 package when requested.

### Colorado

**Form DR 0106CR** now prints when any credit flows to the form.

### New Jersey

**New Jersey PTE-100** reflects the correct amount for application of overpayment option and the estimate letters reflect overpayment amount when no amount of refund present.

### New York

Additional update for PTE and credit code 653:

1. The ownership percentage on the partner list worksheet will now be the ending profit percentage from Form IT-204-IP.
2. Credit code 653 will no longer calculate a negative value.
3. The software will automatically allocate the amount entered for code 653 when entered on New York > Credits > Partners' Credit Information > Other Flow-Through Credit Bases and Factors without having to use special allocation code 34850.
4. The total PTET credit on the partner list worksheet will now recalculate any time data is changed in the return.

### Tennessee

**Tennessee Form 170, Schedule U** reflects correct NOL carryover amount for 2020 when return is rolled over.

### Wisconsin

An addback of the disallowed amount of IRS 100% business meals expense to WI ordinary income on will flow to Schedule 3K as an other addition.