

CCH Access™ Tax  
2021-5.1  
Release Notes

December 4, 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.

## Tax Product Updates

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### Individual (1040) Product Updates

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#### Federal

**Form 8915-F.** Line 12 and Line 23 roll forward to Income > IRAs, Pensions and Annuities (1099R) > 8915F Qualified Disaster Retirement Plan Information, so that the last deferred pension or IRA distribution portion is present.

#### Louisiana

**Form R-10606, Column 8** no longer calculates a negative amount. If a zero amount is entered in Tax Paid to Other State on LA credit for taxes paid input, it overrides the automatic calculation for the specified state.

#### Minnesota

Filing instructions now include the address of 600 N. Robert St.

## Corporation (1120) Product Updates

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### North Carolina

**Form CD-405.** Schedule M-1, Line 8's statement no longer duplicates prior year capital loss carryover amounts when filling federal Form 1120F.

### Power Pack

**Consolidated Form 1120-L, Page 1, Line 21b.** Net Operating Loss Deduction, now includes Income from Transition Relief in its taxable income limitation. Separate company Form 1120-L is unchanged, and continues to properly include Income from Transition Relief in its taxable income limitation.

## S Corporation (1120S) Product Updates

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### New York

Form NYC NOLD, Schedule B, Line 1 now reflects the amounts from Form NYC 3L, Schedule B, Line 21g.

### West Virginia

Schedule SP, Column C4 can now be marked for exempt organization shareholders.

## Partnership (1065) Product Updates

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### California Electronic Filing

The CA return will no longer be rejected with Reject code X0000-020 when the option to NOT transmit the federal return is selected on General > Electronic filing worksheet > General > Do not transmit Federal return or extension at this time (Interview form EF-1, Box 50) and the CA return is being electronically filed.

## Exempt Organization (990) Product Updates

### Federal

All data that has been entered for Schedule H, Page 8 will now print.

Allowed losses for short term and long term gain will now flow to Schedule D instead of the full amount of the loss.

Page 2 will no longer print when Page 1, Line 2p is marked "No."

**Schedule A, Line 10** has been updated to correctly calculate when Line 2 is a loss and net gains are present.

The carryover report will no longer show a positive ACE adjustment entered for the current year.

### California

**Form 109, Schedule H** statement will now foot correctly for the consolidated periodicals.

**Form 199, Schedule M, Line 5** statement will now print when an amount is present