

CCH Access™ Tax  
2023-2.1  
Release Notes

January 14, 2024



**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 2023-2.1

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## Tax Updates

### Beneficial Ownership Information

The Corporate Transparency Act (CTA), enacted in 2021, requires certain U.S. and foreign entities to report information about their “Beneficial Owners” to the Treasury Department’s Financial Crimes Enforcement Network (FinCEN). “Beneficial Owners” are the individuals who directly or indirectly own or control a company. For more information, please see this [Knowledge Base Article](#). For more information on a solution available with Wolters Kluwer, please see [our BOI Website](#).

### Partnership & S Corporation

**Schedule K-1 Codes.** Schedule K-1 codes have been added for the Federal entity based on preliminary instructions received from the IRS. Federal Schedule K-1 and states are still in process in accommodating these new codes and will be completed on a future release. Once the final instructions are received from the IRS, a review will be completed and any additional codes and/or changes will be adjusted at that time. Please continue to monitor Software News and Release Notes for updates.

### Electronic Filing Updates

As of Sunday, January 14th, electronic filing is available for tax year 2021 and 2022 returns with the announcement by the IRS that business electronic filing is available as of January 16, 2024. All returns will be held in a status of “Ready to Transmit” until the IRS is ready to accept these returns, but will still be considered timely filed. We are projecting electronic filing for tax year 2023 business returns to be available with release 2023-2.2, scheduled for January 21st. The IRS also recently announced that Individual (1040) electronic filing will be available on January 29, 2024. We are projecting to have Individual (1040) electronic filing available with release 2023-2.3, available January 28th. Please monitor Software News and Release Notes for electronic filing availability going forward.

### Return Manager

Enhanced Return Manager features, like those listed below, originally projected to be included on this release have been delayed due to unforeseen circumstances. We are projecting to have the items below and many other features, available on release 2023-2.2, available on January 21st. We apologize for the inconvenience.

Workstream Integration: Link to Project or open Route Sheet

Prohibit Changes: Prohibit or allow changes on one or more returns

Update Status: Change the return status of multiple returns

Print Blank Organizers

## Tax Product Updates

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### Individual (1040) Product Updates

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#### North Dakota

**North Dakota Form ND-1AC** has been added.

#### Utah

**Form TC-546EST.** Utah > Estimates > Estimate preparation > Voluntary Prepayment input that appeared has been removed as the payment should be recorded on Federal > Payments/Penalties/Estimates > Payments > State Estimated Tax Payments Summary.

## Corporation (1120) Product Updates

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### Federal

Select Michigan cities and Kentucky cities will no longer show as code OHC in Common State/City > State/City Common Data > General Information on the 2023 return when the 2022 return is elected for Roll Forward.

## S Corporation (1120S) Product Updates

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### North Carolina

**Form 429B PTE Underpayment Penalty** has been added on this release.