

CCH Access™ Tax
2023-2.2
Release Notes

January 21, 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 2023-2.2

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Tax Updates

All Entities

Form 5471, Information Return of U.S. Persons with Respect to Certain Foreign Corporations. Print collation has been addressed so that the schedules related to an entity print with the parent 5471. This will apply to all taxing entities.

Exempt Organization

Federal. Form 7004, Application for Automatic Extension of Time to File Certain Business Income Tax, Information and Other Returns, will be added to the Exempt Organization tax product. This can be used to file an extension for Form 1120-POL, U.S. Income Tax Return for Certain Political Organizations. The extension will be available to electronically file and we project having it ready for use by release 2023-2.7, available by February 25th. Please monitor Software News and Release Notes for availability.

Individual

Washington. Washington has been added to the Individual tax product for tax year 2023. Form 40 2452, Capital Gains Tax Return, is available to be filed and will require the use of an authorization. WA in the home state field under General > Basic Data will neither generate the form nor request an authorization to be used. To generate this form, an entry can be made on Washington > General > X to force calculation of Washington return. If any entry on the Washington input forms is made, then an authorization will be requested to generate the state.

Issues Resolved

- Return Status reverting to previous value after updating via Return Manager
- Form GA 600S barcode printing over text

K-1 Manager

The K-1 Manager automation from Partnership (1065) to Individual (1040) returns has been enhanced by adding the following lines during import:

- 20AH - Other Information
- 20G - Recapture of low-income housing credit for other partnerships
- 20H - Recapture of investment credit
- 20I - Recapture of other credits
- 20L - Dispositions of property with section 179 deductions
- 20M - Recapture of section 179 deduction
- 20P - Section 453A(c) information

New Features for Return Manager:

- Roll Forward Templates: Now you can roll forward templates from Return Manager. Choose a template and click Roll Forward on the toolbar.
- Zoom Settings: You can adjust the size of Return Manager on your screen by changing the zoom setting. Go to View > Zoom and pick a level.
- Update Multiple: Now you can change the return configuration set and/or signer for multiple returns. Go to Manage > Update after selecting the returns.
- Prohibit changes: Now you can prohibit or allow changes on one or more returns. Go to Manage > Prohibit Changes or Manage > Clear Prohibit Changes after selecting the returns.
- Send Password: You can reset the password on secured returns. Select Utilities > Send Password.
- Update Status: Now you can change the return status of multiple returns. Go to Utilities > Update Status after selecting the returns. You can also do this from the grid context menu.
- Workstream Integration: Now you can link to Project or open Route Sheet. Go to Utilities > Link to Project or Utilities > Route Sheet.
- Blank Organizers: Now you can print blank organizers. Go to Utilities> Print Blank Organizer Forms.
- Form's Status: Now you can access Form's status information from Return Manager. Click Form's Status on the toolbar or go to Help > Form's Status
- Help Options: New links have been added for Talk to Us and Remote Support link. Go to Help > Web > Talk to us or Help > Web > Remote Support.

Electronic Filing Updates

All Entities

Electronic filing for tax year 2023 is available for the returns and extensions listed below for the specific tax products. For 990-T returns, the IRS is currently not accepting this form for any prior year or current year.

The Individual tax product is currently not available for electronic filing for tax year 2023. It is projected to be available on release 2023-2.3. Please monitor Software News and Release Notes for which returns and extensions are available on that release. Prior year filings for tax year 2021 and 2022 are available for Form 114, California and Texas state only returns. Any other return for Individual, including amended, will need to wait until the IRS opens on January 29, 2024.

Corporation

FBAR Form 114	California Extension	New Jersey Extension
Federal Extension	District of Columbia Extension	Utah Extension
Arizona Extension	New Hampshire Extension	

S Corporation

FBAR Form 114	Arkansas PTE Extension	New Hampshire Extension
Federal Extension	Arizona Extension	New Jersey Extension

Arkansas Extension	California Extension	New Jersey PTE Extension
Arkansas Composite Extension	District of Columbia Extension	Utah Extension

Partnership

FBAR Form 114	Arkansas PTE Extension	New Hampshire Extension
Federal Extension	Arizona Extension	New Hampshire Form DP-10 Extension
Arkansas Extension	California Extension	Utah Extension
Arkansas Composite Extension	District of Columbia Extension	

Fiduciary

FBAR Form 114	Kansas	New Jersey Extension
Federal	Kentucky	Ohio
Federal Extension	Kentucky Extension	Ohio PTE
Arizona	Minnesota	Oregon
Arizona Extension	Missouri	Pennsylvania
Arkansas	New Hampshire	Pennsylvania Estimates
Arkansas Estimates	New Hampshire Form BT-Summary	Pennsylvania Extension
Arkansas Extension	New Hampshire Form BT-Summary Extension	Utah
California	New Hampshire Extension	Utah Extension
California Estimates	North Carolina	Virginia
California Extension	North Carolina Extension	Vermont
Delaware	North Dakota	Vermont Extension
Delaware Extension	North Dakota Estimates	Wisconsin
Hawaii	New Jersey	Wisconsin Estimates
Illinois	New Jersey ESBT	Wisconsin PTE
Indiana		

Employee Benefit Plan

Federal Form 5500	Federal Form 8955-SSA	ggg
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Exempt Organization

FBAR Form 114	lll	ggg
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Tax Product Updates

Partnership (1065) Product Updates

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Minnesota

MN Sch PTE populates if a KPC is present in the return.