

CCH Access™ Tax
2023-5.1
Release Notes

December 8, 2024



Wolters
Kluwer

Contact and Support Information	2
Information in Tax Release Notes	3
Highlights for Release 2023-5.1	4
Tax Updates	4
CCH Access Common	4
Tax Product Updates	5
Individual (1040) Product Updates	5
Corporation (1120) Product Updates	6
S Corporation (1120S) Product Updates	7
Partnership (1065) Product Updates	8
Fiduciary (1041) Product Updates	9
Exempt Organization (990) Product Updates	10

Contact and Support Information

Return to [Table of Contents](#).

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

Return to [Table of Contents](#).

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 2023-5.1

Return to [Table of Contents](#).

Tax Updates

Exempt Organization

Form 8846, Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips has been added to the Exempt Organization product. This credit form is now available for paper and electronic filing.

Corporation

The scan mentioned in the previous [Software News](#) to help identify returns where Form 4626 may have been filed with an amount due that was not necessary, is now available.

CCH Axxess Common

Support

CCH, including support for CCH ProSystem fx Tax, will be closing at 2:00 PM CST on Tuesday, December 24, 2024, through Wednesday, December 25, 2024. Support will be available again at 8:00 AM CST on Thursday, December 26, 2024. We will also be closed on Wednesday, January 1, 2025, and will resume support on Thursday, January 2, 2025, beginning at 7:00 AM CST (via Chat). Please see the schedule of available hours [here](#).

If you require support assistance during this time, please enter a [web ticket](#) and we will respond when normal business hours resume.

Tax Product Updates

Individual (1040) Product Updates

Return to [Table of Contents](#).

Federal

Schedule 8812, Form 2555, Line 50, housing deduction, is included in Line 2b.

Kentucky

Form KNOL, Part 2, Line 6 takes 80% of Line 5, where previously it was taking 80% of Line 3.

Corporation (1120) Product Updates

Return to [Table of Contents](#).

Federal

Form 3468 prints if there are only credit amounts in Parts 3 or 4.

Form 3800, Part 4, Line 4a now flows to Part 2, Line 34.

Kentucky

Combined Schedule COGS, Line 9 displays amounts entered for LLET Schedule COGS - Overrides "Detail of Purchases, Additional Section 263A Costs and Other Costs - Overrides" coded for Line Number "2" or Blank.

Schedule KIDA, Lines 3-7 no longer display negative amounts when Line 2 is greater than Line 1.

Schedule KREDA, Lines 3-7 no longer display negative amounts when Line 2 is greater than Line 1.

Schedule KIRA, Lines 3-7 no longer display negative amounts when Line 2 is greater than Line 1.

Schedule KJDA, Lines 3-7 no longer display negative amounts when Line 2 is greater than Line 1.

Minnesota

When a housing certificate number has been entered containing 0's it now correctly displays on all forms.

When the housing certificate number has been entered for any corporation in a combined group, it now correctly carries to the combined Minnesota Form M4T.

New Jersey

Form CBT-100U, Line 2, Total Tax Credits Used by Combined Group, is limited to the group tax liability (Schedule A, Section II, Part III, Line 4a, Column (c)) reduced by the aggregate minimum tax of the combined group members (Schedule A, Section II, Part III, Line 4b, Column (c)).

New York City

Form NYC 2S, Schedule B, Line 11 or 13 displays an amount when applicable.

West Virginia

WV net operating loss is included on the General Carryover Data worksheet.

S Corporation (1120S) Product Updates

Return to [Table of Contents](#).

Federal

Form 8752, Due Date, at the top of the form, will display 2025 for base years ending in 2024.

Partnership (1065) Product Updates

Return to [Table of Contents](#).

Federal

Form 8985. Statements for Parts IV and V produce again when applicable.

Hawaii

Schedule K-1, Column B is allocating as expected.

New York – New York City

Filing instructions display the correct values for tax and refund amounts.

Fiduciary (1041) Product Updates

Return to [Table of Contents](#).

Nebraska

Form 1041N. The Nebraska bankruptcy estate and amended return checkboxes check the applicable box.

Exempt Organization (990) Product Updates

Return to [Table of Contents](#).

Federal

Form 2220 and Form 2220-PF. Boxes 6, 7, and 8 check even when the current year net tax amount on box 3 is less than the 500 dollar threshold.

The additional information questions on Page 2 will now default to "No" when no answers have been entered.

Alaska

AK 6000, Page 1. The EIN now prints on the bottom of the form in the EIN box.

Schedule I, Lines 1, 5 and 9. When apportionment is entered, the EIN business name and amount will populate within Alaska.

California

EFT instructions populate for trust returns.

Colorado

Informational forms and letters print when the print order option to collate informational forms before filable forms is selected.

Scanlines are added to estimates, extension and payment vouchers when Form DR 0105 is filed.

Maryland

County tax calculation for Anne Arundel returns with greater than \$50,000 taxable income is updated.

New York

Form TR-579-CT prints in the government copy when electronically filing Form CT-13.

Oregon

Forms OR-41, CT-12, CT-12S, and CT-12F. Extended due dates are displayed in letters when the option to print the extended due date is selected.

Wisconsin

Wisconsin filing instructions print in the government copy when the print option is selected.