At Wolters Kluwer, we understand it’s vitally important to obtain, listen to, and act on customer feedback regarding our products and services. We take all suggestions and recommendations into account when prioritizing CCH ProSystem fx® Tax and CCH Axcess Tax enhancement requests so that we can meet the needs of as many customers as possible — whether you’re a sole practitioner, mid-sized operation, large regional, or multi-national public accounting firm.

You see, we understand that tax professionals have different requirements, and we always strive to deliver the software features and capabilities necessary to serve your clients, manage your firm, grow your revenues and protect your brand and reputation. We’re dedicated to making our CCH ProSystem fx® Tax and CCH Axcess Tax software the very best it can be year-after-year, and in doing so, we rely on a team of experts to understand the critical business issues you face every day.

Rest assured, our Product Management, Software Development, and Customer Service and Support Teams work tirelessly to ensure the CCH ProSystem fx® Tax and CCH Axcess Tax software solutions you rely on are the strongest, most accurate, comprehensive tax preparation and compliance tools in the profession. In keeping with that overarching goal, please take a few minutes to review this document which provides an overview and a partial listing of enhancements delivered over the past twelve months, as well as some exciting news about other solutions that can help you meet your goals.
What’s New with CCH® ProSystem fx® Tax and CCH Axcess™ Tax for 2019–2020

New Federal and State Forms
- **Section 199A Qualified Business Deduction** — We added data entry fields and calculations to support new IRS worksheets.
- **Illinois** — There’s now an automatic flow of data entry from federal 1065, 1120S and 1041 pass-through worksheets to schedules K-1-P and K-1-T (1040).
- **Minnesota** — Schedules M1CAT, LK, M1NC, KFNC, KPINC, KSNC, M1MOVE, M1SA and M1UE have been added.
- **Business Returns** — New questions related to 1065, 1120 and 1120S due to the Tax Cuts and Jobs Act were added.

New Forms Added Due to the Tax Cuts and Jobs Act of 2017
- **Form 461** — Limitation on Business Loss
- **Form 965** — Inclusion of Deferred Foreign Income Upon Transition to Participation Exemption System
- **Form 965-A** — Individual Report of Net 965 Tax Liability
- **Form 965-B** — Corporate and REIT Report of Net 965 Tax Liability
- **Form 8990** — Limitation on Business Interest Expense Under Section 163(j)
- **Form 8991** — Tax on Base Erosion Payment of Taxpayers with Substantial Gross Receipts
- **Form 8992** — U.S. Shareholder Calculation of Global Intangible Low-Taxed Income (GILTI)
- **Form 8993** — Section 250 Deduction for Foreign Derived Intangible Income (FDII) and Global Intangible Low-Taxed Income (GILTI)
- **Form 8994** — Employer Credit for Paid Family and Medical Leave
- **Form 8995** — Qualified Business Income Deduction Simplified Computation
- **New Schedules within the 1040**
  - Schedule 1, Additional Taxes and Adjustments to Income
  - Schedule 2, Additional Tax
  - Schedule 3, Nonrefundable Credits
  - Schedule 4, Other Taxes
  - Schedule 5, Other Payments and Refundable Credits
  - Schedule 6, Foreign Address and Third-Party Designee

New Electronic Filing States for 1040
- **CO** — Electronic filing capability for Extensions
- **CT** — Electronic filing capabilities for Estimates
- **MD** — Electronic filing capabilities for Estimates
- **MI Cities** — Electronic filing capabilities for Cities of Benton Harbor, Walker, Jackson and Muskegon Heights.
- **NJ** — Electronic filing capabilities for Estimates

New Electronic Filing States for Business Returns
- **AR** — for Consolidated 1120
- **LA** — Form 565, Partnership Return of Income
- **OH** — Ohio IT-1140, Pass Through Entity and Trust Withholding Return for 1065
- **OH Cities** — RITA and Municipal Net Profits Tax for 1065, 1120 and 1120S
What’s New with CCH® ProSystem fx® Tax and CCH Axcess™ Tax for 2019–2020

New Electronic Filing States for Specialty Returns
- IL — Electronic Filing capability for schedules K-1-P and K-1-T Data entry on 1041
- MI — Form 1041, Michigan Fiduciary Income Tax Return
- OH — Form IT-1140, Passthrough Entity and Trust Withholding Tax Return

Other New Features and Enhancements
- Multi Factor Authentication — We’ve added fields in Configure Staff for a user’s e-mail address and mobile phone number in order for users to recover a password (CCH ProSystem fx Tax only).
- Diagnostics — For the 10 Business Day Rule, the electronic filing dialog box now shows the states that need to be calculated, though the program does not allow for the exporting of the tax return until you de-select or calculate the return. Additionally, the program stops the upload if an impacted state tax authority in the package is on an expired release.
- Electronic Filing Manager (EFIN) — As part of the e-mail address format validation, we have added field level format validation of e-mail address fields.
- Notification — We’ve added a menu option for Forms Release Status that allows users to access the information via CCH Software News.
- Government Form Name — We changed the government view name, SSN/EIN, Street Address, City, State and Zip code fields from direct data entry to override fields that now appear on the Interactive Government Override Report (IGOR).
- Picklist Question Tables — For greater clarity, picklists for various questions have changed to: Yes, No, Leave Blank (1120 and 1120S modules only).
- Composite Tax Returns — We added Federal level input to activate Composite Tax Returns (1065 and 1120S only).
- Electronic Filing Status System — A view pertaining to the 10 Business Day Rule has been added, as well as a filter option to show returns with states that will expire based on the number of business days remaining.
- 1040 Federal — Schedule B, Interest and Ordinary Dividends – Additional columns have been added to the Interest and Dividend Summary Report.
- 1041 Returns — Interest and Dividends – We’ve added additional columns to the Interest and Dividend Summary Report.

Tax Enhancements