ProSystem *fx*® Planning

Welcome to ProSystem *fx* Planning 2014.02000

This bulletin provides important information about the 2014.02000 release of ProSystem *fx* Planning . Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 3, Option 5. Additional information is available on CCH Support Online.

New In This Release

State Enhancements:

- Improved Connecticut tax calculation
- Improved Louisiana tax calculation
- State taxable amount fields are available for Wages, Pension, Annuity and IRA distributions
- Improved state phase-out calculations for personal exemptions and standard deductions, where applicable

2014 Updates:

- Federal interest rate
- Premium Tax Credit worksheet
- Premium Tax Credit input grid
- Health care individual responsibility calculation

2015 Updates:

Federal inflation rate

State Standard Deduction Updates:

- District of Columbia 2015 standard deduction amounts
- Iowa 2015 standard deduction amounts
- Montana 2014 standard deduction amount

State Itemized Deduction Updates:

2014 New York itemized deduction phase-out

State Exemption Updates:

- District of Columbia 2015 exemption amounts
- Montana 2014 exemption amounts
- Utah 2014 exemption credit

State Tax Bracket and Rate Updates:

- City of Yonkers 2014 rate
- District of Columbia 2015 brackets and rates
- Idaho 2014 brackets and rates
- Iowa 2015 brackets and rates
- Montana 2014 brackets and rates
- New York 2014 supplemental tax worksheets
- New York 2014 tax brackets and rates
- Wisconsin 2014 rates

Technologies now supported with ProSystem *fx* Planning release 2014.02000:

- Microsoft Office 2013 32-bit
- Microsoft Windows Server 2012 R2
- Microsoft Windows 8.1

    Note: Windows 8.1 Basic and RT are not supported.

Installing ProSystem *fx* Planning

Real Time Virus Scan Reminder: The Planning directory structures must be excluded from the virus scan on workstations and servers for the program to install and/or run properly.

Installation Steps

1. Download the release image. You will be asked to either **Run** or **Save** the update. It is recommended to save the file to a temporary location rather than running it from the website.
2. Once saved, double-click the .exe file to initiate the install.
3. At the Permission File screen, select one of the permission key options to find your 2013 permission key and click **Next.** The option to download your permission file from the Internet requires a Single Sign-On (SSO) account login.
4. At the end of the installation process, select the desired program group for your ProSystem *fx* Planning icon.
5. Once the installation is complete, reboot your PC to ensure that all system files are properly initialized.

Note: When installing from a network, you must run x:\Accuplnr\setup (where x is your network drive) on each workstation that will run Planning. The Type of Installation defaults to Workstation Setup. Each workstation must be rebooted after workstation setup is complete.