CCH® ProSystem *fx*® Planning

Welcome to CCH® ProSystem *fx*® Planning 2016.01000

This bulletin provides important information about the 2016.01000 release of CCH ProSystem *fx* Planning. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-800-739-9998, Option 3, Option 5. Additional information is available on CCH Support Online.

New in this Release

Print Enhancements

- Correspondence letter
  - Provided ability to produce a correspondence letter based on each client's tax scenario
  - Letter can include various pre-defined paragraphs with dollar and percent variances
  - The letter can be printed to an .RTF file for editing in Microsoft® Word
  - A custom letterhead can be applied to the letter
- Graphs
  - Provided ability to produce dynamic graphs depicting various tax scenarios
  - Provided ability to compare tax scenarios from year to year or case to case
  - Six pre-defined graphs can be customized to present each client's specific tax scenario
  - Switch between graph types and various data to be contrasted in the graphical presentation

2016 Updates

- Federal inflation rate
- Pension inflation
- Interest rate for the first quarter of 2016

State Tax Standard Deduction Updates

- Iowa 2016 standard deduction amounts
- Maine 2016 standard deduction amounts
- Montana 2016 standard deduction amounts
- North Carolina 2016 standard deduction amounts

State Tax Bracket and Rate Updates

- Arkansas 2016 tax bracket and rate
- Iowa 2016 tax bracket and rate
- Indiana 2017 tax rate
- Kansas 2016 and 2017 tax bracket and rates
- Maine 2016 and 2017 tax bracket and rates
- Minnesota 2016 tax bracket and rate
- Montana 2016 tax bracket and rate

- New York 2016 tax bracket and rate
- North Carolina 2017 tax rate

New Technologies now supported with CCH ProSystem *fx* Planning Release 2016.01000
- Microsoft® Office 2016
- Microsoft® Windows® Server 2012 R2
- Microsoft® Windows® 10
- Adobe® DC

Installing CCH ProSystem *fx* Planning

Refer to the CCH ProSystem *fx* Planning Instruction Guide for complete information on installing and using CCH ProSystem *fx* Planning.

Please follow the instructions below to install this release

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 from Software Delivery Manager. You will be asked to Save the self-extracting executable. It is recommended to save the file to the default location.
2. Double-click the self-extracting executable, to launch the installation. If the files are extracted already, then select Start > Run and type ?:\Setup (where ? represents the location of the install files) and click OK.
3. Click Next on the Welcome screen to display the Type of Installation dialog.
4. Select either a Network or Standalone install.
5. Click Next to continue.
6. Select the destination location for the program files. You can accept the default location or browse to a different location.
7. Click Next to continue.
8. At the Permission File screen, select one of the permission key options to find your 2015 permission key and click Next. The option to download your permission file from the Internet requires a Single Sign-On (SSO) account login.
9. Select the features you want to install.
10. Click Next to continue.
11. If you are doing a Network install, select Planning Default option and click Next.
12. Select the desired program group for your CCH ProSystem *fx* Planning icon.
13. Click Next to continue.
14. Click Install to begin the installation.
15. 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 ?:\Accuplnr\setup (where ? 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.