CCH® ProSystem *fx*® Planning

Welcome to CCH ProSystem *fx* Planning 2016.02000

This bulletin provides important information about the 2016.02000 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

Protecting Americans from Tax Hikes Act (PATH) of 2015 Updates

The following permanent provisions are available in this release:

- Refundable child credit.
- American Opportunity credit.
- Additional earned income provision.
- Educator expense deduction.
- Special rules for charitable contributions of real property for conservation purposes.

The following extended provisions are available in this release:

- Deduction for mortgage insurance premiums extended through 2016.
- Deduction for sales tax extended through 2016.
- Tuition and fees deduction extended through 2016.
- Nonbusiness energy property credit extended through 2016.
- Credit for qualified residential solar property extended through 2021.

2016 Federal Rate Updates

- Business and moving mileage.

State Tax Standard Deduction Updates

- Kentucky 2016 standard deduction amounts.
- Maine 2016 standard deduction amounts.
- Rhode Island 2016 standard deduction amounts.

State Tax Exemption Updates

- Rhode Island 2016 exemption amounts.

State Tax Bracket and Rate Updates

- Massachusetts 2016 tax rate.
- Rhode Island 2016 tax bracket and rates.

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.