CCH® ProSystem *fx*® Planning

Welcome to CCH ProSystem *fx* Planning 2017.01000

This bulletin provides important information about the 2017.01000 release of CCH ProSystem *fx* Planning. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Reminder: To import a 2015 tax return to CCH ProSystem *fx* Planning v. 2017.01000, your plan should have a start year of 2015. CCH ProSystem *fx* Planning v. 2017.01000 defaults to a start year of 2016. Follow the steps below to change the start year of your plan:

1. In CCH ProSystem *fx* Planning, open the client you would like to import from 2015 CCH® ProSystem *fx* ®Tax.

2. Open Plan Properties by selecting **File > Plan Properties**, **Ctrl + R**, or by clicking the icon on the toolbar.

3. Click on the **Configuration** tab.

4. Select **2015** from the **Start year** list.

5. Click **OK**.

6. Start import by going to the File menu and selecting **Import > CCH ProSystem fx Tax**.

7. Click **OK**.

   Note: These steps can also be found on https://support.cch.com/kb/solution.aspx/sw46154.

2017 Updates
- Federal inflation rate

- Pension amounts

- Health Savings Account amounts

- Maximum income subject to Self-Employment tax

- Premium Tax Credit table amounts

State Tax Standard Deduction Updates
- District of Columbia 2017 standard deduction amounts

- Iowa 2017 standard deduction amounts

- New York 2017 standard deduction amounts

- North Carolina 2017 standard deduction amounts

State Tax Bracket and Rate Updates
- Iowa 2017 tax brackets and rates

- Kansas 2018 tax brackets and rates

- New York 2017 tax brackets and rates

Technologies supported with CCH ProSystem *fx* Planning Release 2017.01000
- Citrix® XenApp™ versions 7.5 through 7.9

- Product guides are no longer an option to install. They can be found under **Help > CCH Prosystem fx Planning support on the web > Product Guides**

- Install to UNC path location

    o **Note:** CCH ProSystem *fx* Planning may be installed using the UNC path of a network. It no longer requires users to use mapped drives.

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 window.

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 2016 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 the **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 re-booted after workstation setup is complete.