CCH® ProSystem *fx*® Planning

Welcome to CCH ProSystem *fx* Planning 2017.01010

This Release Notes document provides important information about the 2017.01010 release of CCH ProSystem *fx* Planning. Please review this information carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

It has been brought to our attention that some files are not footing correctly for net tax due on the Federal Summary on CCH ProSystem *fx* Planning v. 2017.01000. This issue is corrected with CCH ProSystem *fx* Planning v. 2017.01010.

2017 Updates
- Federal business mileage rate

- Federal moving mileage rate

- Kentucky standard deduction

- Maine tax rate schedule

- Montana standard deduction

Reminder: To import a 2015 tax return to CCH ProSystem *fx* Planning v. 2017.01010, your plan should have a start year of 2015. CCH ProSystem *fx* Planning v. 2017.01010 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.

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.