Wolters Kluwer
When you have to be right

CCH® ProSystem *fx*® Planning

User Guide

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Chapter 1

INTRODUCTION

CCH ProSystem *fx* Planning takes advantage of the features and functionality of Windows®, providing the power and flexibility to meet your tax planning needs efficiently and accurately.

Guide Usage

The following information can help you get the most out of this guide:

- **Bold** words in a step-by-step procedure indicate an action you should take. These usually refer to menu commands you use to initiate an operation.
- *Italics* identify the names of dialog components.
- Certain familiar operations such as using Help, checking status, and accessing the Customer Support website are explained in the appendix.
- The appendix also outlines how to create an export file in Tax Preparation for use with CCH ProSystem *fx* Planning.

Features

The following list can help you familiarize yourself with the system's features and terminology so you can use the system effectively:

- **Spreadsheet format**. Working grids display in familiar spreadsheet format and utilize many standard spreadsheet functions.
  - **Summary grid**. Federal, Resident State, and Nonresident State summary grids display calculated amounts derived from detail grid data, detail lists, or override amounts entered on the summary grid.
  - **Input grid**. A grid expanded for a row on the summary grid. Specific grids are available for different types of tax information such as *Adjustments to Income* or *Wages and Business Income*.
  - **Worksheets**. Worksheets display the calculation of a certain tax amount such as Itemized Deductions or Alternative Minimum Tax. These worksheets are a result of data entered on input grids.

- **30 cases allowed per tax plan**. A case is a scenario or projection, such as investigating the effects of an IRA deduction or the sale of an asset. Thirty cases are available for each plan.
- **Ten planning years available per case**. One year prior, the current year, and eight future years. Each planning year displays in a column. The years for a case display in consecutive columns.
- **Automatic calculations**. The system calculates totals as data is entered. This saves you time and shows you the effects of a change immediately.
- **Multiple levels of detail**. Fields can expand to further levels of detail to display multiple occurrence/repeater data.
- **Grid list**. Lists all input grids for easy selection and access. Grids display on the *Select Grid* dialog, which is accessed from the Grids menu or by using the Input Grid button.
- **Worksheet list**. Lists all worksheets for easy selection and access. Worksheets are displayed on the *Select Worksheet* dialog, which is accessed from the Worksheets menu or by using the Worksheets button.
- **Configurable reports**. Select columns to be included in a report. *Variance columns* can be included and expressed in dollars or percentages.
- **Right-click pop-up menus**. Saves you time by gathering the commands applicable to the current activity into one easily accessible place.
- **Tooltips**. Always available to jog your memory. When the cursor pauses on a toolbar button, a tooltip displays the purpose of the button.
- **Variance grid**. A way to compare data from two selected years with the variance expressed in dollars or percentages. Data in a variance grid can be edited, and the change is reflected in the appropriate areas of the associated summary grid. Multiple variance grids comparing different columns can be open simultaneously.
- **Detail lists**. Totals automatically transfer to the originating numeric cell. Detail lists allow entry of descriptions and amounts and can be printed. Cells that have lists attached are indicated by a green marker in the cell's upper left corner.
- **Notes**. Keep the notes you want for specific fields as *field notes* or for the plan as a whole as a *plan note*. Field notes can be printed in configurable reports. Cells that have field notes attached are indicated by a blue marker in the cell's lower left corner.
- **Override ability**. Amounts may be overridden on the summary grids. The data on associated detail grids is retained in case an override is cleared. Override amounts display in magenta.
- **Extensive Help system**. Includes system and row-level Help. These Help systems provide the most up-to-date information about system operations.
- **AutoFlow feature**. Eliminates the need for duplicating entries across columns. When AutoFlow is activated, a number entered in a cell is automatically repeated in the same row for the subsequent case years.

  Note: The application retains amounts for subsequent years that are manually entered when the AutoFlow feature is disabled.

- **Import ability**. Saves time when entering data. Data can be imported directly from the CCH® ProSystem *fx*® Tax application.

- **Export Ability**. Export directly from CCH ProSystem *fx* Tax or CCH Axcess™ Tax applications as you are preparing returns.
- **Pre-configured state tax rates, deductions, exemptions and credits for all states that allow state income tax**. Additional state specific calculations for CA and NY.
- **Multi-user network access**. Allows each workstation to set its own preferences. Files are locked to prevent concurrent editing of a plan by two users.
- **Calculator**. Ready to work at the click of a button. Totals can be transferred to the current cell, if desired.
- **Navigation Bar**. This option allows you to have the list of input grids or worksheets displayed while entering data. The navigation bar can float or be docked vertically on the left or right side of the window.

  To turn the navigation bar on, select **View** and click **Navigation Bar**. A check mark displays next to the option.

  To display the list of input grids, select **Grids** from the menu bar, or select the **Grid** icon on the toolbar.

  To display the worksheet list, select **Worksheets** from the menu bar, or select the **Worksheets** icon from the toolbar.

  Only one list can be displayed at a time.
- **Print to Engagement Binder**. Easily print plan forecasts such as worksheets, input grids, plan summaries, plan reports, and estimates to a CCH® ProSystem *fx*® Engagement or CCH® ProSystem *fx*® Workpaper Manager binder.

System Requirements

Visit our Customer Support website for up-to-date Planning information on system requirements. Select **Support > Product Support > CCH ProSystem *fx* Planning** and click **System Requirements** tab.

Installation

Planning installation files are available on Software Delivery Manager (SDM) for download. You can access SDM using your Single Sign On (SSO) user ID and password.

Notes:

- You may receive an account verification prompt after entering your SSO user ID and password to log into SDM. If so, you must request and submit a 2-Step Verification code to proceed by following the prompt instructions. Additional instructions about SDM can be found on the CCH Knowledge Base.
- A permission key is necessary for your first installation of CCH ProSystem *fx* Planning and for the installation of the initial CCH ProSystem *fx* Planning release each year. For subsequent

installations, the install program reads permission information from your hard drive or network server.

Installing CCH ProSystem *fx* Planning

1. From the CCH ProSystem *fx* Planning install wizard welcome screen, click **Next**.
2. Choose the type of install you need to complete and click **Next**.
   - **Network Install** - Installs a version of the planning software to a network drive so that multiple users can access the information and use shared defaults.
   - **Standalone Install** - Installs Planning on the local machine so that only this user will have access.

     Note: Laptop Install and Workstation Setup are used with a Network Install to link additional workstations to the network. These will be used only after the initial network install is completed.

   - **Laptop Install** - The Laptop install is designed for users that need to be linked to the network but also work remotely. When the laptop is connected to the network, it will link to the network install. When the laptop is working remotely, a standalone version is used. When the laptop is linked back to the network, the system will sync.
   - **Workstation Setup** - Used to connect multiple users to the existing network install.
3. Select the destination Folder:
   - Select the drive you would like to have planning installed on.
     - For a standalone install it will likely be the C drive (C:\).
     - For a network install, click the browse button and locate the drive you need to install on.

       Note: It is recommended the install should be at the root of the selected drive and on the same drive as the tax install.

   - If you already have a version of Planning installed, select the drive and then *AccuPlnr* folder (For example, on a Network install - K:\AccuPlnr).
   - Once the drive is selected, click **Next**.
4. Install the permission key using one of the following options:
   - **Internet Download** - This is the recommended method as well as most common. You will be prompted to log in using your Single Sign On (SSO) user ID and password. These are the same credentials that you use to log into SDM. In

addition, you may receive an account verification prompt after you enter you user ID and password. If so, you must request and submit a 2-Step Verification code to proceed by following the prompt instructions.

    - Once logged in, the system will pull the needed information.

- **Use previously installed permission key** - If you are updating your Planning software or re-installing, you can select this option rather than having to log in.

- **Permission key disk drive path** - If you downloaded the permission file or support has provided you with a copy of the permission key, user the browser button to locate where the file is saved.

    - From the browse window, Select the **FXPERM02** file.
    - Select **Open**.

5. Setup Program Folder. By default the system will create a folder titled "*CCH ProSystem fx Planning*"; however, you can change the folder name or add to a previously created folder. Click **Next**.
6. Click **Install** to start the installation process.

   Note: The install can take several minutes to complete. Since the install will need the machine to reboot; please make sure that any unsaved items are saved and closed prior to the next step.

7. Select the "*Yes, I want to restart my computer now*."
8. Click **Finish**.

If completing a network install, a workstation setup will need to be run from each of the machines that need to have planning installed. There are multiple ways to run a workstation setup, but these steps ensure that it is run from the correct drive.

1. Select **Start > Run > Browse to your Network drive**.
2. Select *Accuplnr* folder.
3. Select **Setup.exe**.
4. Select **Install** if you are prompted to install required files.
5. At the *Installation Wizard* dialog select **Next**.
6. Select **Workstation Setup** at the **Type of Installation** dialog.
7. Select **Next**.
8. Select a local folder for Print and Plan Configuration defaults (applies to Workstation-Specific setting only.
9. Select **Next**.
10. Select Firm-Wide or Workstation-Specific Default.
11. Select **Next**.
12. Select **Next** button on *Select Program Folder* dialog.
13. Select **Install**.

14. Select "*Yes, I want to restart my computer now*".
15. Select **Finish**.

Uninstalling CCH ProSystem *fx* Planning

To uninstall CCH ProSystem *fx* Planning, complete the following steps:

1. From the *Start* menu, select **Control Panel > Programs and Features**.
2. On the *Install/Uninstall* tab, select **CCH ProSystem *fx* Planning** from the list of installed software and click **Add/Remove**. If you are uninstalling a local installation, skip to step 4.
3. Do one of the following:
   - To uninstall the entire network installation, choose **Uninstall Network**.
   - To remove the local program group, icons, and registry entries, choose **Uninstall Workstation**.
4. A confirmation dialog displays. Click **Yes** to begin the uninstall program.
5. Click **Finish**.

Note: You may be prompted to restart your computer. You can choose to restart now or later, but the computer must be restarted to completely remove Planning program files.

The uninstall program does not remove client data files or output folders.

Summary and Input Grids

Grids display data in a familiar spreadsheet format with many standard spreadsheet capabilities. Refer to the picture below for clarification of each of the items, which explain the presentation of information and functionality within the spreadsheet format.

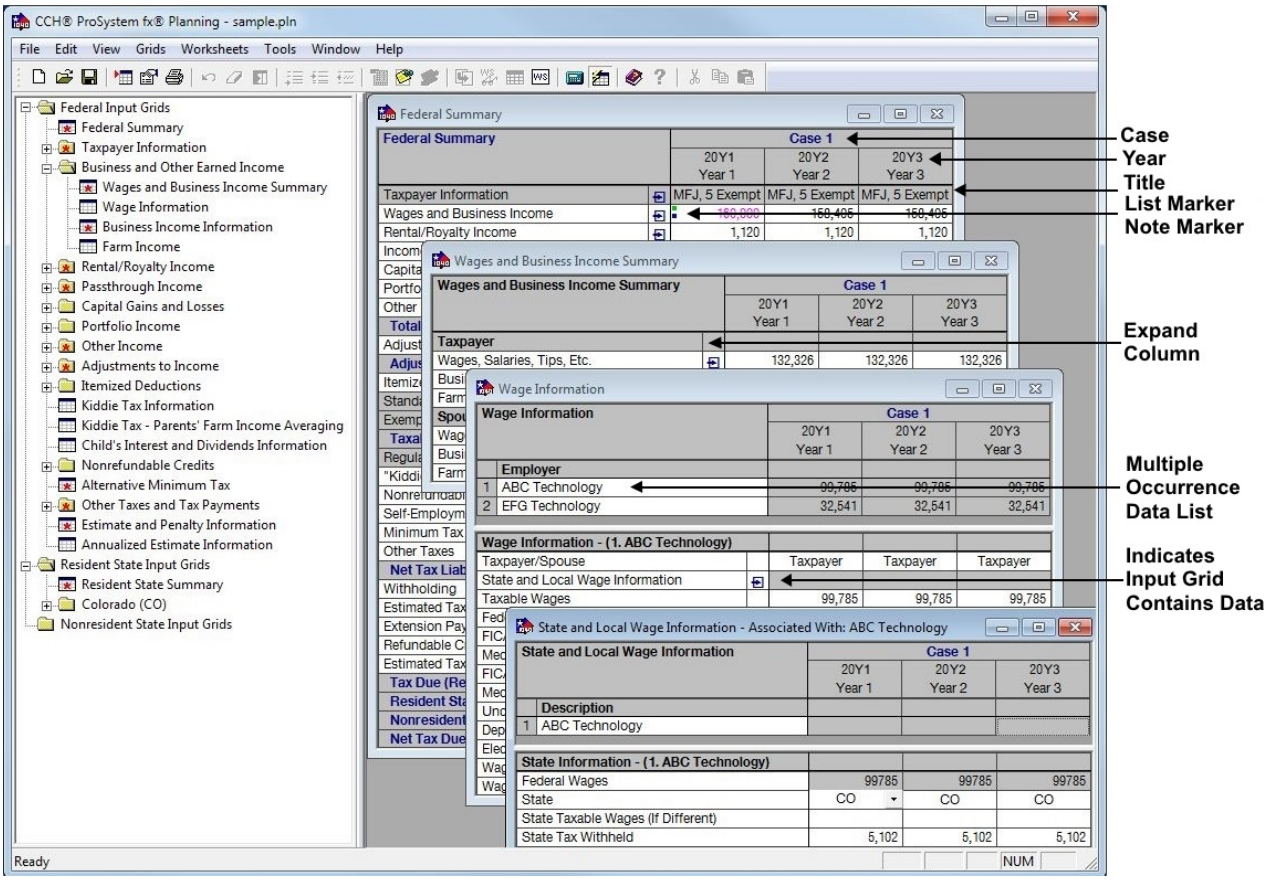
- Customizable case titles span the year columns that are associated with them.
- Year columns display the year and the caption assigned to them in File > Plan Properties > Configuration.
- The input grid displays the same case and column format as the summary grid.
- Expanding columns allow you to view multiple levels of detail for repeater data.
- Grid cells with a gray background are unavailable and cannot be edited, as in the case of a header field.
- The blue square in the expand column indicates that there is an input grid associated with this item.

- The arrow symbol in the expand column indicates detail data is present on the associated input grid.

- Cells that have lists attached are indicated by a green marker in the upper left portion of the cell.

- Cells that have notes attached are indicated by a blue marker in the lower left portion of the cell.

- All overridden fields display in magenta.
- Negative amounts appear in red.



This is an example of a summary grid with two levels of input grids beneath it. The *Federal Summary* grid expands to the *Wages and Business Income Summary* grid, which in turn expands to the *Wage Information* grid, and then even further to the *State and Local Wage Information* grid.

In this example, 20Y1 indicates the start year, 20Y2 and 20Y3 are the subsequent years.

Toolbar

The toolbar's default location is directly under the menu bar of the application window. It can be turned on or off, re-sized, moved, or docked vertically to any of the four window edges. In addition, the toolbar can be customized by adding, removing, or reordering the buttons.

New. (**Ctrl** + **N**) Creates a new plan.

Open. (**Ctrl** + **O**) Opens an existing plan.

- **Save**. (**Ctrl** + **S**) Saves changes without closing the plan.
- **Import**. Imports return data from the CCH ProSystem *fx* Tax application into a new or existing plan.
- **Properties**. (**Ctrl** + **R**) Displays the tax plan properties for the currently active plan.
- **Print**. (**Ctrl** + **P**) Allows you to access print selections for printing summary, worksheets, graphs, letters, input grids, and estimates.
- **Undo**. (**Ctrl** + **Z**) Reverses the last data entry action.
- **Cut**. (**Ctrl** + **X**) Removes data from a selected cell and places it on the Clipboard.
- **Copy**. (**Ctrl** + **C**) Copies data from a selected cell to the Clipboard to subsequently paste into a cell.
- **Paste**. (**Ctrl** + **V**) Inserts cut or copied data from the Clipboard into a selected cell.
- **Clear Contents**. Deletes all contents of a selected cell except any associated notes.
- **Copy Case/Column**. Copies the data from a case or column to another case or column.
- **Add Item**. Adds a new item for entry of multiple occurrence data at the bottom of an existing list.
- **Insert Item**. Inserts a new item for entry of multiple occurrence data above the item currently selected.
- **Delete Item**. Deletes the currently selected item.
- **List**. (**Ctrl** + **L**) Allows you to enter a list of numeric entries with descriptions to be attached to a cell.
- **Plan Note**. Allows you to open a new note or edit an existing note for the whole plan.
- **Field Note**. (**Ctrl** + **F**) Opens a note for the selected cell.
- **Expand to Detail**. (**Ctrl** + **E**) Opens the input grid for the currently selected grid row.
- **View Supporting Worksheets**. (**Ctrl** + **W**) Allows you to view worksheets that explain the currently selected amount.
- **Input Grids**. Opens a list of available input grids from which you can make your selection.
- **Worksheets**. Opens a list of available worksheets from which you can make your selection.
- **AutoFlow**. (**Ctrl** + **A**) Activates or deactivates the AutoFlow feature.
- **Calculator**. Allows you to access a calculator with the capability to apply calculated amounts to the current cell.
- **Help Topics**. Accesses the system Help file.

Help for Current Row. (**F1**) Accesses Help specific to the currently active cell of detail grids.

Customizing the Toolbar

Enabling or Disabling the Toolbar

To turn the toolbar on or off, do the following:

1. Select **View**.
2. Click **Toolbar**. A check mark next to this option indicates that it is enabled. The absence of a check mark indicates that the toolbar is turned off and does not appear on the interface window.

Moving or Resizing the Toolbar

To move or resize the toolbar, do the following:

1. Position the mouse pointer in an empty area on the toolbar.
2. Drag the toolbar to the location you want.

   If you move the toolbar to any of the edges of the screen, it docks itself to the new location. If you move the toolbar anywhere else, it becomes a floating toolbar that can be moved and resized as you would a window.

Adding Buttons and Separators to the Toolbar

To add buttons and separators to the toolbar, do the following:

1. Select **Tools > Customize Toolbar**. The *Customize Toolbar* dialog displays.
2. Select a button or separator from the *Available toolbar buttons* list and do one of the following:
   - Click **Add**. The toolbar dynamically updates itself as you make changes.
   - Drag the button or separator to the *Current toolbar buttons* list.

     Note: Separators are the thin lines that separate groups of buttons on the toolbar. You can add multiple separators to group buttons as desired.
3. If you want to reposition the button or separator on the toolbar, select it and click **Move Up** or **Move Down**. You can also drag them to a new position.
4. When you have added the desired buttons or separators, do either of the following:
   - Click **Close** to exit and save your changes.
   - Click **Reset** and then click **Close** to exit without saving your changes. The Reset feature restores the toolbar to its settings before you opened the *Customize Toolbar* dialog. Reset does not restore the default toolbar configuration.

Removing Buttons from the Toolbar

To remove buttons from the toolbar, do the following:

1. Select **Tools > Customize Toolbar** to display the *Customize Toolbar* dialog.
2. Select an item from the *Current toolbar buttons* list and click **Remove**.
3. Do either of the following:
   - Click **Close** to exit and save changes.
   - Click **Reset** to exit without saving your changes, and then click **Close**. The Reset feature restores the toolbar to its settings before you opened the *Customize Toolbar* dialog. Reset does not restore the default toolbar configuration.

Reordering Buttons on the Toolbar

To reorder toolbar buttons, do the following:

1. Select **Tools > Customize Toolbar** to display the *Customize Toolbar* dialog.
2. Select the button (or separator) to be moved in the *Current toolbar buttons* list and click **Move Up** or **Move Down**.
3. Do either of the following:
   - Click **Close** to exit and save changes.
   - Click **Reset** to exit without saving your changes, and then click **Close**. The *Reset* feature restores the toolbar to its settings prior to being customized. Reset does not restore the original default toolbar configuration.

General Tax Capabilities

You can rely on CCH ProSystem *fx* Planning for all of the following tax computations:

- Alternative minimum tax
- Passive loss limitations
- Earned income credit
- Self-employment tax
- Capital gains tax
- Taxable social security
- Retirement deductions
- Credit limitations
- Lump-sum distributions
- Kiddie tax
- Tax on retirement plans

- Estimated tax
- Additional Medicare Tax
- Net Investment Income Tax

Chapter 2

CONFIGURING PLANNING

You can configure certain default options in CCH ProSystem *fx* Planning, eliminating the need to set up each tax plan individually.The federal and state setup is configured at a global level for all users. The other configurations explained in this chapter are set up at a workstation level and can be overridden at the plan level if needed.

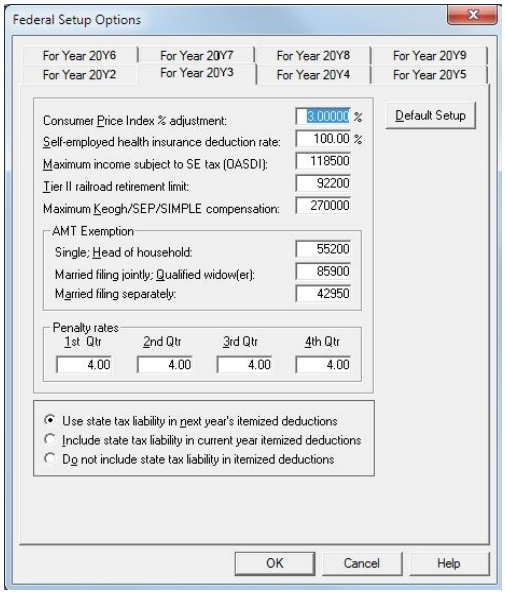
Setting up Federal and States

(Tools > Setup Fed and States)

The *Federal/State Setup* dialog allows you to change preset federal and state parameters. In addition, you can add and delete user-defined state information.

Setting Up Federal Options

1. Select **Tools > Setup Fed and States**.
2. If it is not already selected, click **Federal** to select it.
3. Click **Edit Setup**. The *Federal Setup Options* dialog opens.



4. Select the tab of the year you want to change.
5. Change the parameters on the dialogs as needed.
6. Click **OK** to accept the changes and exit the dialog.

   Note: To revert to default settings for federal, click **Default Setup**. A warning message displays, allowing you to confirm or abort the change.

Setting Up State and City Defaults

You can edit an existing state or city, add a new state or city, set up different versions of the same state or city to address differing tax circumstances, or revert to the system's state default settings.

Be sure to configure any states for which you plan to import data *prior* to initiating the import process.

Editing a Pre-Defined State or User-Defined State or City Setting

1. Select **Tools > Setup Fed and States**.
2. Open the *States* or *User Defined States/Cities* folder and select the state or city you want to edit.
3. Click **Edit Setup** to access the *Setup* dialog for the selected state.
4. Select the appropriate tabs and make entries as needed.
5. To setup future year exemptions, standard deductions, and tax rates, use the *Year* list on the *General Information* tab to select a year, and then click **Setup Information**. To setup future year Consumer Price Index % Adjustments, use the *Year* list on the *General Information* tab to select a year, and then click **Setup Information**.
6. After making entries, click **OK** to return to the state's *Setup* dialog.
7. Click **OK** to accept the entries and exit the dialog.

   Note: You can revert to the default settings for the selected state by clicking **Default Setup** on the *General Information* tab. A warning message displays, allowing you to confirm or abort the change in settings. Default Setup is available only for states that are predefined; any added states do not have this option.

Setting Up California

1. Select **Tools > Setup Fed and States**.
2. Open **States** folder.
3. Select **CA** and click **Edit Setup** to access the *California Setup* dialog.
4. Change the *Consumer Price Index % adjustment* for each year, if necessary.

   Note: You can revert to the system default settings for California by clicking **Default Setup**. A warning message displays, allowing you to confirm or abort the change.

5. Click **OK** to accept the changes and exit the dialog.

Setting Up New York

1. Select **Tools > Setup Fed and States**.
2. Open **States** folder.
3. Select **NY** and click **Edit Setup** to access the *New York Setup Options* dialog.
4. Choose **Setup New York State**, **Setup New York City**, or **Setup CPI** and select **OK**.

   Note: You can revert to system default settings for New York by clicking **Default Setup**. A warning message displays, allowing you to confirm or abort the change.

5. On the dialog that displays, select the appropriate tabs and make changes as needed.

New York and New York City CPI % Adjustment Dialog

This dialog allows you to adjust the tax tables, standard deduction and exemption amounts for each year using a consumer price index percentage.

These values are cumulatively applied to the amounts entered in the New York and New York City setup tabs.

Adding a State or City

1. Select **Tools > Setup Fed and States**.
2. Click **Add State** to access the *Add State/City* dialog.
3. Do one of the following:
   - To add a state, use the *Code* list to select a state code. The states listed are states that do not currently have income tax. The system completes the *Name* box with the name of the selected entity.
   - To add a user-defined state/city, enter a code and name of your choice.

   Note: You can delete a user-defined state or city by selecting the code on the *Federal/State Setup* dialog and clicking **Delete State**.

4. Click **OK** to display the *Setup* dialog for the selected state.
5. Select the appropriate tabs and year input screens and make entries as needed.
6. After making entries, click **OK** to return to the state's *Setup* dialog.
7. Click **OK** to accept the entries and exit the dialog.

Planning Defaults

(Tools > Planning Defaults)

All planning defaults are established on a workstation level. There are two tabs available to set defaults for all tax plans: *Print Defaults* and *Configuration*.

Print Defaults

Print Default settings are used for the Plan Summary, Plan Report, and Print This Worksheet. These settings can be overridden when reports are printed for each plan.

To set print defaults, do the following:

1. Select **Tools > Planning Defaults**. The *Configure Planning Defaults* dialog displays the *Print Defaults* tab.
2. Select one of the following *Format options*:
   - **Print the reports with a page border**. Prints reports with a border. This option is not selected by default.
   - **Print the reports with line references**. Prints reference lines for Federal Form 1040 and Schedule A, for California Form 540 and Schedule CA, and for New York Form IT 201. This option is not selected by default.
3. Select one of the following *Footer options*:
   - **Customized text**. Enter up to 36 characters of text for the footer.
   - **Include date and time stamp**. Choose one of the format options: *None*, *Date only*, or *Date and time* to be printed in the footer.
4. In *Letter options*, choose to use *Custom letterhead* or enter the information that you want to appear in the first four lines of the correspondence letter.

   Notes:
   - Custom letterhead should be saved as letterhead.pdf in the accuplnr\reports directory.
   - Custom letterhead will not display in print preview.
5. Click **OK** to save the settings and exit the dialog, click **Cancel** to exit the dialog without saving the settings, or click the **Configuration** tab at the top to set the Configuration options.

Configuration Options and Tax Plan Properties

Default options are used for all new tax plans created after the defaults are set up. Use **File > Plan Properties** to override these defaults on a plan-by-plan basis.

Note: Set up and configure any states you want to use before setting the default configuration options.

To set configuration options, do the following:

1. Select **Tools > Planning Defaults**. Click the **Configuration** tab on the *Configure Planning Defaults* dialog.
2. Set the default Tax plan configuration.
   - **No. of cases**. The system default is 1. The maximum number allowed is 30. To change the number of cases, click **Add Case** or **Remove Case**.

- **Start year**. The system default is the current year.

  The number of years available is based on the start year selected. For example, if the current year is chosen as the start year, then nine years are available, which includes the current year plus eight future years. If the prior year is chosen as the start year, then ten years are available, which includes the prior year, the current year, and eight future years.

  If the current year is chosen as the start year, then nine years are available, which includes the current year plus eight future years. If the prior year is chosen as the start year, then ten years are available, which includes the prior year, the current year, and eight future years.

- **No. of years**. The system default is 3. Use the drop-down list to select 1 through 10.

  The number of years available is based on the start year selected. However, if the number of years chosen is greater than the number allowed by the start year entered, the system changes the start year to the appropriate year.

  The system does not increase the number of years if the start year is changed to an earlier year.

3. Select a case folder. Enter a Case caption and Case description for the case in the *Selected case/year definition* section. The caption text displays as the case title on the grids.
4. To assign the same resident state to each year, select the first year and use the Resident State/City list to select a default state code. You will receive a message to assign the selected state to all subsequent years in that case.
5. If you want to assign different Resident states to each year, select *No* on the message and select a different state.
6. Enter a Year caption in the *Selected case/year definition* section. The caption text is used as the title of the year column on grids and reports.
7. To assign a Nonresident state to the case, select the first year and use the **Nonresident State** button to select the nonresident states. You will receive a message to assign the selected state (s) to all subsequent years in that case.
8. If you want to assign different states to each year, select **No** on the message and select different state(s).
9. If you want the default number of cases to be more than the system default of one, click as many times as needed. New cases are added consecutively to the bottom of the list. To remove a case, select it and click **Remove Case**.
10. Click **OK** to save the settings and exit the dialog, click **Cancel** to exit the dialog without saving the settings, or click the **Print Defaults** tab at the top to set *Print Defaults* options. See *Print Defaults* on the previous page for information.

Setting Preferences

(Tools > Preferences)

By default, CCH ProSystem *fx* Planning plan files (.pln) are stored in the x:\AccupInr\Plans directory (x is the drive containing the plan files). You can change the default directory by doing the following:

1. Select **Tools > Preferences** to display the *Preferences* dialog.
2. In the *User Data Path* box, enter the drive and directory where you want to store the plan files such as N:\ACCUPLNR\Plans\, or click **Browse** to access a dialog from which to select a drive and directory.

   Note: If you enter a directory that does not exist, CCH ProSystem *fx* Planning prompts to create the directory for you.

3. Click **OK** to save the setting and exit the dialog or click **Cancel** to exit the dialog without saving the setting.

Printer Setup

(File > Printer Setup)

CCH ProSystem *fx* Planning uses the standard Windows® printer setup. If you have questions about setting up a printer, see the Windows® documentation.

Navigation Bar

(View > Navigation Bar)

This option allows you to have the list of input grids or worksheets displayed while entering data. The navigation bar can float or be docked vertically on the left or right side of the window.

To turn the navigation bar on, select **View** and click **Navigation Bar**. A check mark displays next to the option.

To display the list of input grids, select **Grids** from the menu bar, or select the **Grid** icon on the toolbar.

To display the worksheet list, select **Worksheets** from the menu bar, or select the **Worksheets** icon from the toolbar.

Only one list can be displayed at a time.

Chapter 3

TAX PLAN FILE OPERATIONS

You can create a new plan using File > New or by using File > Import. New plans are configured using the default case settings from Tools > Planning Defaults > Configuration and can be changed as needed. See *Chapter 2 - Configuring Planning* on page 12 for information on configuring a default tax plan and setting federal and state default parameters.

For information on starting a plan by importing data from CCH ProSystem *fx* Tax, see *Importing Tax Data* on page 26.

Creating a New Plan

(File > New)

Use this procedure to begin a new plan for a client. To save time, you can set tax plan default settings such as federal and state parameters and tax plan configurations before creating new plans. See *Chapter 2 - Configuring Planning* on page 12 for detailed information.To create a new plan, do the following:

1. Click **New** or **Ctrl + N** to display the *Tax Plan Properties* dialog.
2. Enter plan information as needed. All fields are optional.
   - **Plan name**. Enter a name to be used to identify the plan, usually the taxpayer's name. This prints on the plan summary, plan report, and data listing.
   - **Plan description**. Enter text describing the tax facts and circumstances of the plan. This does not print on reports.
   - **Prepared by**. Enter the preparer's name or initials. This prints on the first page of the printed output.
   - **Client ID**. If you are creating a plan for a CCH ProSystem *fx* Tax client, click **Select Tax Client** to display the *Select CCH ProSystem fx Tax Client* dialog. If not, go to the *Taxpayer/Spouse SSN* field description below.

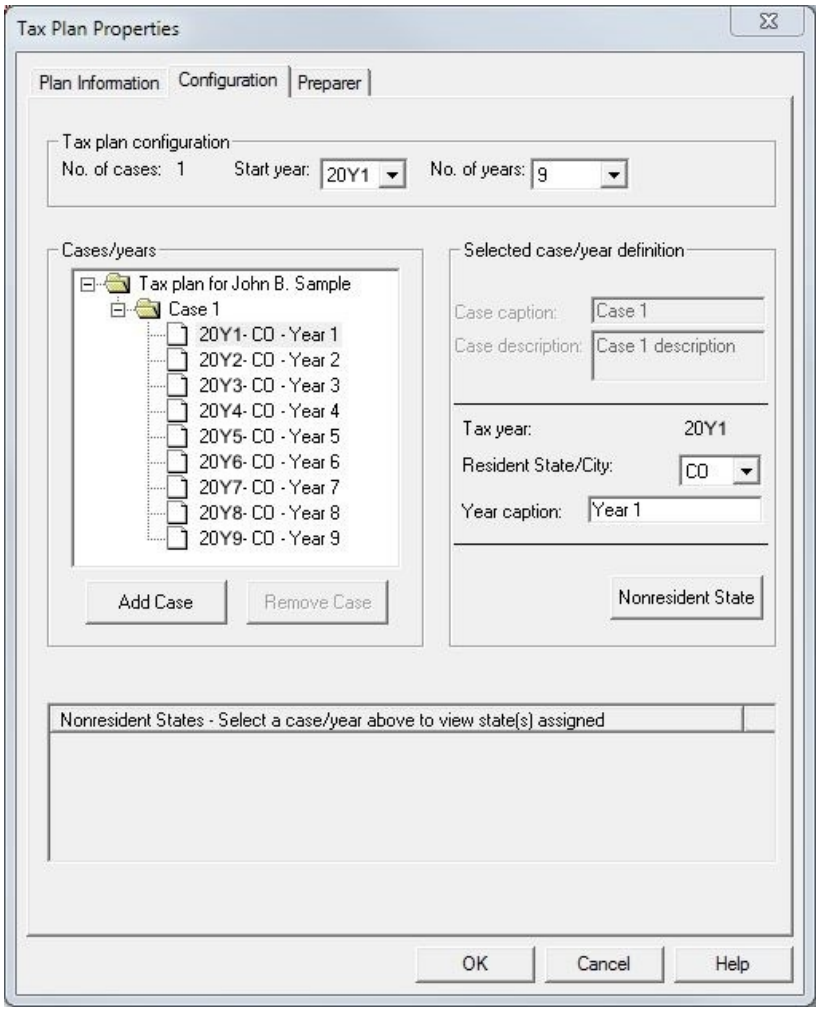
     Note: If prompted, enter your CCH ProSystem *fx* User ID and password and click **OK**.

You can enter a specific client ID or name and click **OK**, or you can enter a partial ID or name, or select an office group or preparer to display a list of clients matching the criteria. On the list that

displays, select the client and click **OK**. In either case, taxpayer data such as name and address is completed on the *Tax Plan Properties* dialog with data from the selected return. Only client data, not tax data, is imported in this operation.

- **Taxpayer/Spouse SSN**. Enter the taxpayer's and spouse's Social Security numbers if not provided through the *Select Tax Client* feature.
- **Taxpayer/Spouse name**. Enter the taxpayer's and spouse's names if not provided through the *Select Tax Client* feature.
- **Street address**. Enter the street address if not provided with the *Select Tax Client* feature.
- **City, state, ZIP**. Enter the city, state, and ZIP code if not provided with the *Select Tax Client* feature.
- **Foreign country, province and postal code**. Enter the foreign country, province and postal code if not provided with the *Select Tax Client* feature.
- **Primary and secondary email.**. Enter the email addresses if not provided with the *Select Tax Client* feature.

3. Click the **Configuration** tab. The *Tax plan configuration* options reflect the system defaults or the defaults set in Tools > Planning Defaults (see *Configuration Options and Tax Plan Properties* on page 15 for details). Use the lists to change the options. In the example below, the Start year is indicated as 20Y1. Subsequent years, shown in the Case Years, are indicated as 20Y2 and 20Y3.



- **Start year**. The system default is the current year.

  The number of years available is based on the start year selected. For example, if the current year is chosen as the start year, then nine years are available, which includes the current year plus eight future years. If the prior year is chosen as the start year, then ten years are available, which includes the prior year, the current year, and eight future years.

  Note: Using Option 2 on the Return Processing Options for the CCH ProSystem *fx* Planning export method, the starting year should be one year following the current tax year. For details, see *Exporting Tax Data to Planning from CCH ProSystem fx Tax or CCH Axcess Tax* on page 27.

- **No. of years**. The system default is 3. Use the drop-down list to select 1 through 10.

  The number of years available is based on the start year selected. However, if the number of years chosen is greater than the number allowed by the start year entered, the system changes the start year to the appropriate year.

4. Select a case folder. Enter a Case caption and Case description for the case in the *Selected case/year definition* section. The caption text displays as the case title on the grids.
5. Click the first case year displayed for Case 1. The *Resident State/City* box reflects any default established in the Planning Defaults. Accept the default or use the list to select a different state or city code. You will receive a message to assign the selected state to all subsequent years in that case. If you select **Yes**, that state will carry to all subsequent years. If you select **No**, the state selection will only be for that year.

   Note: The Resident state cannot be the same as the nonresident state. You will receive a message saying that it has been updated to a resident state.

6. Select the **Nonresident State** button in the *Selected case/year definition* section to display a list of states that can be assigned to the case year. Nonresident states that have been assigned to the case year will display in the *Nonresident States* box at the bottom of the dialog. You will receive a similar message to the resident state to apply to all subsequent years in that case.
7. Repeat steps 4 through 6 to customize additional cases.

   Note: You can add a case by clicking **Add Case**. You can remove a case by selecting it and clicking **Remove Case**

8. Select the *Preparer* tab, choose to use custom letterhead or enter the information that you want to appear in the first four lines of the correspondence letter in the Heading 1 - 4 fields.

   Notes:

   - Custom letterhead should be saved as letterhead.pdf in the accuplnr\reports directory.
   - Custom letterhead will not display in print preview.

9. Click **OK** to exit the dialog and save the settings.

   If you are not setting up a plan using CCH ProSystem *fx* Planning client data, the plan's *Federal Summary* displays.

   If you are setting up a plan using CCH ProSystem *fx* Planning client data, a message displays asking if you want to import tax data.

   - If you click **No**, the plan's *Federal Summary* displays. You can import the tax data later by selecting **File > Import**.
   - If you click **Yes**, the *Applicable Returns* dialog displays. Select the appropriate return from the list and click **OK**. The import process begins. When the import is complete, the plan's *Federal Summary* displays.

Note: The import process does not take place if the return has never been calculated and saved.

Opening an Existing Tax Plan

(File > Open)

Tip: The four most recently accessed files are available from the file menu.

To open an existing tax plan, do the following:

1. Click **Open** or **Ctrl** + **O** to display the *Open* dialog.
2. Accept the default path or use the **Browse** button to select a different path. The *Files of type* defaults to CCH ProSystem *fx* Planning files (.pln).
3. Select one of the listed plans or enter a file name in the *File name* box. Enter a partial file name to filter out list of matching file names.
4. Click **OK** to accept a selected plan.

   If another plan is currently open, it is closed and you are given the opportunity to save any changes that have been made. Once it is closed, the new plan opens.

   If the system detects that the plan was created in a prior year release of CCH ProSystem *fx* Planning, a message displays, giving you an opportunity to make changes to the years.

   - If you click **Yes**, the plan's *Tax Plan Properties* dialog opens. Click the **Configuration** tab to make changes to the years.
   - If you click **No**, the plan's *Federal Summary* opens.

Note: If the plan being opened contains a year that is not supported in the current version of CCH ProSystem *fx* Planning, a message displays, informing you that data in the unsupported planning years will be deleted. You can make changes to the years in the plan by clicking **Change Plan Configuration** on the message dialog.

Securing a Tax Plan

(Tools > Security)

You can use a password to secure individual tax plans in CCH ProSystem *fx* Planning. If you assign a password to a tax plan, anyone attempting to open the plan must enter the password before being allowed to access the plan.

If you import data secured in CCH ProSystem *fx* Tax, you must enter the following information before you can successfully complete the import:

- A valid user ID for data secured by a user ID.
- The correct password for return data protected by a password.

  Notes:

  - If you forget the password for a plan and need an override password, you can contact Customer Support to obtain a temporary password. Contact information can be found on

the Customer Support Contact page. To display the contact number, select **CCH ProSystem fx** from the *Select a Category* field. You can also **Open a Support Case** or **Chat with a Representative**.

- If an override password is used, then a message displays indicating that the plan is no longer password protected.

To secure a tax plan in CCH ProSystem *fx* Planning, do the following:

1. Select **Tools > Security** to display the *Secure Tax Plan* dialog.
2. Select the **Secure this tax plan** box.
3. Enter any combination of up to 12 alphanumeric characters as a password in the *Password* field. Spaces are invalid.

   Note: The password is case-sensitive.

4. Reenter the password in the *Verify* field.
5. Click **OK** to accept the password.

To remove security from a plan, select **Tools > Security** and clear the *Secure this tax plan* box.

Changing a Tax Plan's Properties

(File > Plan Properties)

A tax plan's properties are initially determined by default Planning Settings. You can use the following procedure to assign Resident and Nonresident States, add, remove, or re-sequence cases, or to change captions, start years, or the number of included years.

To change a tax plan's properties, do the following:

1. From within the tax plan, click **Properties** or **Ctrl** + **R** to display the *Tax Plan Properties* dialog.
2. Click the appropriate tab to make changes.
3. Click **OK** when finished to save the settings. If the changes result in deleting case data, a warning displays. Choose one of the following responses:
   - Click **Yes** to confirm your changes. All currently opened plan windows close, and the reconfigured *Federal Summary* window opens, reflecting the changes.
   - Click **No** to return to the *Tax Plan Properties* dialog, then click **Cancel** to exit without saving the settings.

Assigning Resident/Nonresident States

To assign a Resident State, do the following:

1. From within the tax plan, click **Properties** or **Ctrl + R**.
2. Click the **Configuration Tab**.
3. Select the first year indicated in Case 1.
4. Select the **Resident State/City** drop down to assign a state.

5. You will be asked to apply the state selected to subsequent years. If you select **Yes**, the state is assigned to the other years. If you select **No**, the state is only assigned to that year. Enter text in the *Year caption* box. The caption text displays as the title of the year column on grids.
6. Click **OK**.

To assign a Nonresident State, do the following:

1. From within the tax plan, click **Properties** or **Ctrl + R**.
2. Click the **Configuration Tab**.
3. Select the first year indicated in Case 1.
4. Select the **Nonresident State** button for a list of states that does not include the resident state.
5. Select the desired nonresident state(s) and select **OK**. You will be asked to apply the state selected to subsequent years. If you select **Yes**, the state is assigned to the other years. If you select **No**, the state is only assigned to that year.
6. Click **OK**.
7. The Nonresident States will display at the bottom of the dialog for the selected case/year.

Adding a Case to a Plan

A case added using the following procedure has no data in it. Use the **Edit > Copy Case/Column** (see *Copy Case/Column* on page 36) option to copy existing data in other cases/columns into the new case.

To add a new case, do the following:

1. From within the tax plan, click **Properties** or **Ctrl** + **R**.
2. Click the **Configuration** tab.
3. Click **Add Case**. A new case is added to the bottom of the list as shown. You can reposition it by dragging it to the desired sequence in the list.
4. Select the case folder. Enter a Case caption and Case description for the case in the *Selected case/year definition* section. The caption text displays as the case title on the grids.
5. Click the *Case years* and enter state or city codes and captions as needed in the *Selected case/year definition* section. The caption text is used as the title of the year column on grids.
6. Click **OK**.

Removing a Case from a Plan

To remove a case, do the following:

1. From within the tax plan, click **Properties** or **Ctrl** + **R**.
2. Click the **Configuration** tab.
3. Select the case you want to remove.
4. Click **Remove Case**.
5. Click **OK**. A confirmation message displays. Click **Yes** to confirm the deletion or click **No** to return to the *Tax Plan Properties* dialog without removing the case.

Re-sequencing a Case

To re-sequence a case, do the following:

1. From within the tax plan, click **Properties** or **Ctrl** + **R**.
2. Click the **Configuration** tab.
3. Reposition cases in the list by dragging them to the desired sequence.
4. Click **OK**. The cases are correspondingly re-sequenced in the grids.

Saving a Tax Plan

(File > Save and File > Save As)

Use *Save* to save a new or existing tax plan without closing it. Use *Save As* when you want to create a new version of an existing plan.

To save a new or existing tax plan during operations, do the following:

1. Select **File > Save** or click **Save**.
2. New tax plans prompt you with the *Save* dialog. Accept the default path as set in Tools > Preferences or enter a different path. Enter a file name with a .pln extension. Click **Save** to save the plan. The plan remains open.

   Existing plans are saved immediately.

To create a new version of an existing tax plan, do the following:

1. Select **File > Save As**.
2. Select a path by using the **Browse** button or manually enter the path, then enter a file name.
3. Click **Save** to save the file.

Closing a Tax Plan

(File > Close)

To close a tax plan file, do the following:

1. Select **File > Close**. If the file has had no changes made to it since the last save, the file closes. If you have made changes to the plan since your last save, a dialog prompts you to save your changes.
2. Click **No** to close the plan without saving changes. Click **Yes** to save and one of the following happens:
   - If the file has been saved previously, the plan closes.
   - If the file is new and has never been saved, the *Save* dialog displays. Accept the default user data path or select another path. Enter a file name.

Importing Tax Data

(File > Import)

This feature allows you to import tax data from CCH ProSystem *fx* Tax. Data can be imported from a tax return into a new or existing tax plan.

Importing from a Tax Return to an Existing Plan

Note: Be sure to read *Exporting Tax Data to Planning from CCH ProSystem fx Tax or CCH Axcess Tax* on the facing page before importing files from a tax return.

To import tax data to an existing plan, do the following:

1. Open the plan to which you are importing tax data.
2. Select **File > Import** or click **Import**.
3. A message displays indicating that data in the columns of the starting tax year will be overwritten. Click **Yes** to proceed with the import or click **No** to cancel.
4. Select the version of CCH ProSystem *fx* Tax that you want to use for the import process. This only applies if the user has both Laptop and Workstation Tax installed.

   Note: If prompted, enter your user ID and password.

5. When the *Select CCH ProSystem fx Tax Client* dialog displays, do one of the following to select a return:
   - **Select specific client**. Choose either *Client ID* or *Client name*, enter the appropriate information in the box provided, and click **OK**.
   - **Select client by**. Use the lists to select an *Office group* or *Tax preparer* to generate a list of clients from which to choose and click **OK**.
6. On the *Applicable Clients* dialog, select the appropriate client and click **OK**.
7. On the *Applicable Returns* dialog, select the return and click **OK** to initiate the import.

   Notes:

   - To ensure that the imported data is complete and accurate, the system checks to see if the selected return has been calculated and saved. If the return has never been calculated and saved, the import process is aborted. If the return has had data entered after a calculation, you are asked if you want to continue the import process.
   - If the selected return is protected by a password, the system prompts you to enter the password.

8. After the import is complete, select **File > Plan Properties** to enter plan information and make any changes to the tax plan configuration.

Importing from a Tax Return to a New Plan

Note: Be sure to read *Exporting Tax Data to Planning from CCH ProSystem fx Tax or CCH Axcess Tax* below before importing files from a tax return.

To import tax data to a new plan, do the following:

1. If a plan is not open or a plan is open but no CCH ProSystem *fx* Client ID has been identified, select **File > Import** or click **Import**.
2. Select the version of CCH ProSystem *fx* Tax that you want to use for the import process. This only applies if the user has both Laptop and Workstation Tax installed.

   Note: If prompted, enter your user ID and password.
3. When the *Select CCH ProSystem fx Tax Client* dialog displays, do one of the following to select a return:
   - **Select specific client**. Choose either *Client ID* or *Client name*, enter the appropriate information in the box provided, and click **OK**.
   - **Select client by**. Use the lists to select an *Office group* or *Tax preparer* to generate a list of clients from which to choose and click **OK**.
4. On the *Applicable Clients* dialog, select the appropriate client and click **OK**.
5. On the *Applicable Returns* dialog, select the return and click **OK** to initiate the import.

   Notes:
   - To ensure that the imported data is complete and accurate, the system checks to see if the selected return has been calculated and saved. If the return has never been calculated and saved, the import process is aborted. If the return has had data entered after a calculation, you are asked if you want to continue the import process.
   - If the selected return is password protected, the system prompts you to enter the password.
6. After the import is complete, select **File > Plan Properties** to enter the plan information and make any changes to the tax plan configuration.

Exporting Tax Data to Planning from CCH ProSystem *fx* Tax or CCH Axcess Tax

To create the export file, do the following:

1. Access the return in CCH ProSystem *fx* Tax Preparation.
2. Select the Planning export option to use on Return Processing Options.

   The following two options control the type of data exported to CCH ProSystem *fx* Planning. The selection is made in Return Processing Options, CCH ProSystem *fx* Planning export method box.

- **1 - Plan begins with the current tax year**. This is the default option. Use this option when the tax return year is the same as the start year in CCH ProSystem *fx* Planning.

  Note: Carryovers include items such as capital losses, overpayments applied, net operating losses (NOLs), estimate payments, passive losses, and state refunds.

- **2 - Plan begins with following tax year (recurring items and carryover amounts)**. When using this option, the recurring items and carryover amounts from the return are imported into the column year that would be after the tax return year. For example, when an export is performed from the current year's tax return, the information will import into the plan file for the following year (the future year in the case).

  Examples of these types of items include:

  - Most government form line overrides
  - Self-employment income overrides
  - Non-aggregated real estate professional activities

  Note: To decide which option serves your purposes best, consider the following. Certain input cannot be exported with accuracy and may create inconsistent calculation comparisons when the return data is exported to the current tax year column of CCH ProSystem *fx* Planning.

3. Calculate the return.
4. Do one of the following:
   - **CCH ProSystem *fx* Tax**. Select **File > Export > Planning Export**. CCH ProSystem *fx* Planning launches, creating a new tax plan file using the client's CCH ProSystem *fx* Tax ID as the name. The client's data displays in the summary grid.
   - **CCH Axcess Tax**. Select **Planning** in the Export group on the Import/Export tab.
5. The system checks the return and does one of the following:
   - If the return has never been calculated and saved, the export process is canceled.
   - If the return has been calculated but data has changed since the last calculation, a message displays asking if you want to continue the export process. Respond **Yes** or **No**.
   - If the return has had no data changes since the last calculation, CCH ProSystem *fx* Planning opens and the data is exported.

The export process begins immediately.

Note: You are prompted for a password when exporting data from a password protected return.

Managing Tax Plans

(Tools > File Management)

File management allows you to back-up data files and check files in or out from a network installation of Planning.

Setting Up File Management Default Settings

Default settings must be set up before you can access any of the file management options. To set up file management default settings, do the following:

1. Select **Tools > File Management > Setup**. The *File Management Setup* dialog displays.
2. Edit the contents of the *User ID* field if needed.

   Note: If this field is blank, it is recommended that you enter an ID. This information is used for tracking purposes in the file history maintained for tax plan files.

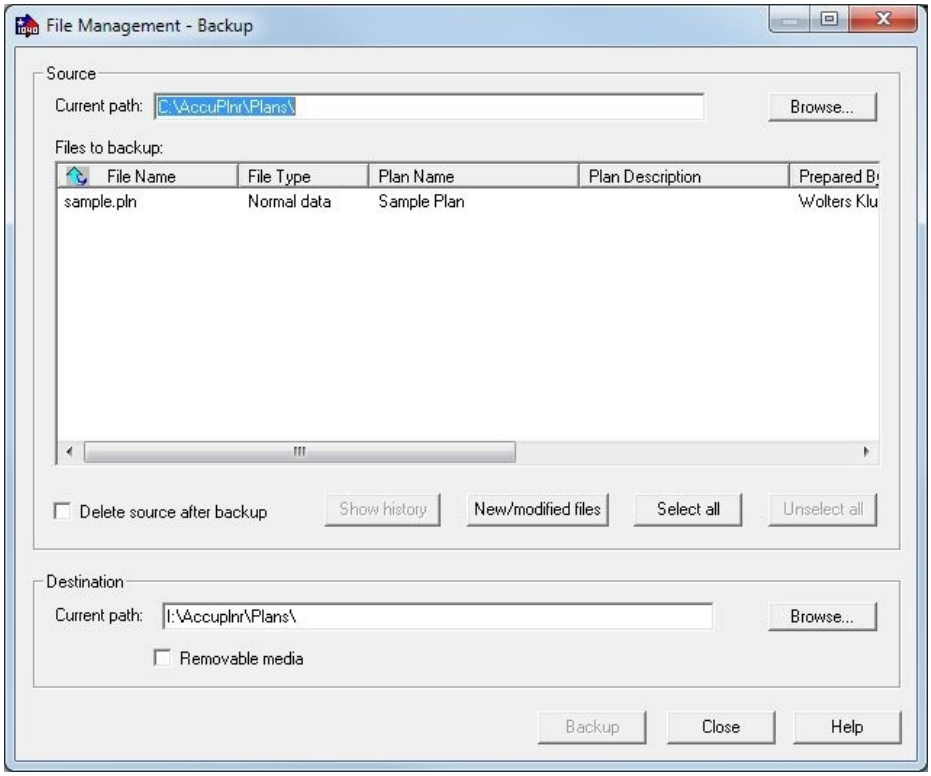
3. In the *File Backup and Restore Paths* section, enter a directory path for backup data in the *Backup to* field or click **Browse**.
4. Edit the contents of the *Restore to* field or click **Browse**. The default is the Planning data directory.
5. In the *File Check-in and Check-out Paths* section, edit the contents of the *Check-in to* field or click **Browse**. The default is the Planning data directory.
6. Enter a directory path in the *Check-out to* field or click **Browse**.
7. Click **OK**.

Backing Up Client Data Files

When backing up large files it is recommended you use a large capacity storage device such as a hard drive, ZIP drive, CD-RW disk, or USB drive. The backup utility cannot save data for one file over multiple removable storage mediums.

To back up client data files, do the following:

1. Select **Tools > File Management > Backup**. The *File Management - Backup* dialog displays.



2. In the *Source* section, the *Current path* field shows the default tax plan file directory. Edit this information or click **Browse**, if necessary.
3. Select a file from the *Files to backup* list.
   - Click individual files to select them.
     - Hold the **Shift** key to select consecutive files.
     - Hold the **Ctrl** key to select non-consecutive files.
   - Click **New/modified files** to select all new or recently modified files.
   - Click **Select all** to select all listed files.
4. Select the **Delete source after backup** box if you want to delete selected files from the source directory during the backup process.
5. In the *Destination* section, the *Current path* field shows the default backup directory. Edit this information or click **Browse**, if necessary.
6. If you are backing up to a removable media device, select the **Removable media** box. The *Removable Media Label* dialog will display. Enter backup detail and click **OK**.

   Note: This allows you to enter descriptive detail, such as the type of storage device or a disk label, during the backup process.

7. Click **Backup**.

8. Click **Close**.

   Note: When a file is deleted during the backup process, a *History Link* file is created. This file contains descriptive detail such as the following:

   - Date of last modifications
   - User who backed up the file
   - Date and location of backup

   To view the *History Link* file detail, select **Tools > File Management > Backup**, select the file, and click **Show history**. The *File History* dialog displays the file path, the type of Planning file, any warnings, and when and by whom the file was last modified.

Restoring Backed Up Data Files

To restore backup files, do the following:

1. Select **Tools > File Management > Restore**. The *File Management - Restore* dialog displays.
2. In the *Source* section, the *Current path* field shows the default backup directory. Edit this information or click **Browse**, if necessary.
3. Select a file from the *Files to restore* list.
   - Hold the **Shift** key to select consecutive files.
   - Hold the **Ctrl** key to select non-consecutive files.
   - Click **Select all** to select all listed files.

   Note: Click **Show history** to view a selected file's backup details.

4. In the *Restore destination* section, the *Current path* field shows the default tax plan directory. Edit this information or click **Browse**, if necessary.
5. Click **Restore**.
6. Click **Close** to exit the dialog.

Checking Client Files In/Out (Network Installation)

Use Planning's Check in/out utility to copy data files to any location or storage device, such as a Hard Drive, ZIP disk, CD-RW disk, or USB drive. This feature is useful if you need to edit files at a different office location.

When a file is checked out, Planning creates an archive file (.pla) in the application's data directory. This file can be opened in Read Only mode. You can save an archived file under a different name using *File > Save As* and then edit the content of the newly created file.

After the checked-out file has been checked in, it replaces the archive file and other users again have access to it.

Checking Out Files to a Local Folder

To check out files to a local folder, do the following:

1. Select **Tools > File Management > Check-out**. The *File Management - Check-out* dialog displays.
2. In the *Source* section, the *Current path* field shows the default tax plan directory. Edit this information or click **Browse**, if necessary.
3. To view a file's check-in/out details, select it from the list and click **Show history**. Click **Close** to return to the *File Management - Check-out* dialog.
4. Select files for check-out by doing any of the following:
   - Hold the **Shift** key to select consecutive files.
   - Hold the **Ctrl** key to select non-consecutive files.
   - Click **Select all** to select all listed files.
5. In the *Destination work folder* section, the *Current path* field shows the default check-out directory. Edit this information or click **Browse**, if necessary.
6. Click **Check-out**. The file is now checked out. An archive file (.pla) is created in the Planning data directory. The archive file is Read Only and cannot be edited.
7. Click **Close**.

Checking In Files from a Local Folder

To check in a file to a network installation of Planning, do the following:

1. Select **Tools > File Management > Check-in**. The *File Management - Check-in* dialog displays.
2. In the *Source* section, the *Current path* field shows the default check-out directory. Edit this information or click **Browse**, if necessary.
3. To view a file's check-in/out details, select it from the list and click **Show History**. Click **Close** to return to the *File Management - Check-in* dialog.
4. Select files for check-in by doing any of the following:
   - Hold the **Shift** key to select consecutive files.
   - Hold the **Ctrl** key to select non-consecutive files.
   - Click **Select all** to select all listed files.

   Note: To abandon a checked-out file, see *Abandoning a Checked-out File* on page 34.

5. In the *Destination folder* section, the *Current path* field shows the default check-in directory. Edit this information or click **Browse**, if necessary.
6. Click **Check-in**. The file is now checked in. The updated file is copied back to the Planning data directory, replacing the archive file.
7. Click **Close**.

Checking In/Out Files Remotely

The following procedures are for users working with a remote installation of Planning, such as a laptop user with a standalone install. This feature allows remote users to check out data from a network installation to their local installation. Once their work is completed they can check in the updated files to the network installation.

When a file is checked out from the network, it is replaced by an archive file (.pla) that contains the client's data. It can be opened in Read Only mode.

Checking Out Files from a Network

Note: Use these instructions only when checking files out from a network to your local installation of Planning.

To remotely check out files from a network installation of Planning, do the following:

1. Select **Tools > File Management > Check-out**. The *File Management - Check-out* dialog displays.
2. In the *Source* section, click the **Browse** button for the *Current path* field and locate the data directory of the Planning network install.

   Note: The default directory for Planning client data is Plans (for example, N:\AccupInr\Plans).

3. To view a file's check-in/out details, select it from the list and click **Show history**. Click **Close** to return to the *File Management - Check-out* dialog.
4. Select files for check-out by doing any of the following:
   - Hold the **Shift** key to select consecutive files.
   - Hold the **Ctrl** key to select non-consecutive files.
   - Click **Select all** to select all listed files.
5. Verify that the directory path of the *Destination work folder* section is targeted to your local tax plan folder. Click **Browse**, if necessary.
6. Click **Check-out** and then click **Close**. You can now edit the file locally.

Checking In Files to a Network

Note: Use these instructions only when checking files in to a network from your local installation of Planning.

To remotely check in files to a network installation of Planning, do the following:

1. Select **Tools > File Management > Check-in**. The *File Management - Check-in* dialog displays.

2. Verify that the directory path of the *Source* section is targeted to your local tax plan folder. Click **Browse**, if necessary.

   Note: The default directory for Planning client data is Plans (for example, N:\AccupInr\Plans).

3. To view a file's check-in/out details, select it from the list and click **Show History**. Click **Close** to return to the *File Management - Check-in* dialog.
4. Select files for check-in by doing any of the following:
   - Hold the **Shift** key to select consecutive files.
   - Hold the **Ctrl** key to select non-consecutive files.
   - Click **Select all** to select all listed files.
5. Verify that the directory path of the *Destination folder* section is targeted to the data directory of the Planning network install. Click **Browse**, if necessary.
6. Click **Check-in**. The local work file is copied to the Planning tax plan directory on the network, replacing the archive file.
7. Click **Close**.

Abandoning a Checked-out File

Use the following procedure to delete a checked-out file without retaining any edits to it. The associated archive file, located in the Planning tax plan directory, is converted into a work file.

To abandon a checked-out file, do the following:

1. Select **Tools > File Management > Check-in**. The *File Management - Check-in* dialog displays.
2. In the *Source* section, the *Current path* field shows the default check-out directory. Edit this information or click **Browse**, if necessary.
3. To view a file's check-in/out details, select it from the list and click **Show History**. Click **Close** to return to the *File Management - Check-in* dialog.
4. Select files to abandon by doing any of the following:
   - Hold the **Shift** key to select consecutive files.
   - Hold the **Ctrl** key to select non-consecutive files.
   - Click **Select all** to select all listed files.
5. Select the *Abandon check-out* box and click **Check-in**.
6. A confirmation dialog displays. Click **Yes**.
7. Click **Close**.

Chapter 4

Data Entry & Edit Functions

While entering data into a plan, you might find it necessary to add, change, or move some information. CCH ProSystem *fx* Planning uses standard Windows® editing functions for entering and manipulating data. Some additional tools have been provided for your convenience.

Edit Menu Tools

The edit features are designed with flexibility and efficiency in mind.

Move or Copy Cells

CCH ProSystem *fx* Planning uses standard Windows® edit commands to cut, copy, paste, and undo changes to individual cells.

To move or copy a cell, do the following:

1. Select the cell you want to move.
2. To move the selection, select **Edit > Cut**, click **Cut**, or **Ctrl** + **X**.
3. To copy the selection, select **Edit > Copy**, click **Copy**, or **Ctrl** + **C**.
4. Select the cell into which you want to place the cut or copied data.
5. Select **Edit > Paste**, click **Paste**, or **Ctrl** + **V**. Any existing data is replaced.

Clear Cells

(Edit > Clear)

To clear elements from a grid cell, do the following:

1. Select the cell from which you want elements deleted.
2. Select **Edit > Clear**.
3. Select one of the following options:
   - All. All values, overrides, lists, and notes associated with the cell are removed.
   - Contents. All values, overrides, and lists associated with the cell are deleted.

     Note: Only clears field note. Does not clear any plan notes.

Copy Case/Column

(Edit > Copy Case/Column)

To facilitate data entry and eliminate redundant data entry, this option can be used to copy data from one column to another column or from one case to another case. The source data is defined by the current focus when the command is selected. Any calculated data on the detail grid is automatically recalculated.

If the copying is done from a detail grid, only the data on that grid is copied. The data includes all entered input including lists and notes if selected in the dialog.

If the copying is done from the *Federal Summary* grid, all detail data from supporting detail grids is copied including lists and notes if selected in the dialog.

To copy a case or column, do the following:

1. Select any cell within the case you want to copy.
2. Click the **Copy Case/Column** button or right-click and choose **Copy Case/Column** from the menu to display the *Copy Case/Column* dialog.
   - Choose the **Current case** button and select the *Copy options* you want included in the copy operation, or
   - Choose the **Current column** button and select the *Copy options* (Lists and Notes boxes) you want to include in the copy operation.
3. Select the target case from the *Copy to* list.
4. Click **OK** to begin the copy process.

Detail Lists

(Edit > Detail List)

Detail lists are available for grid cells and provide a columnar format for recording detail items' descriptions and amounts. The total of the amount column in a detail list automatically transfers to the originating cell. Lists can be printed from the Print > Print Input Grid option or from the active grid or active worksheet. Cells that have detail lists attached are indicated by a green marker in the upper left portion of the cell.

To create a new detail list or edit an existing detail list, do the following:

1. Select the cell to which the list applies. Click **List** or **Ctrl** + **L** to display the *Detail List* dialog.
2. Change the *List caption* if needed.
3. Enter or change items in the *Description* (up to 16 characters) and *Amount* fields as needed. Press **Enter** after every entry to accept the data and update the list total shown at the bottom of the dialog.
4. Click **OK** to accept the list and have the Total transferred to the originating field or **Cancel** to exit without accepting the list.

To delete a detail list, do the following:

1. Select the cell containing the list you want to delete and click **List** or **Ctrl** + **L**.
2. Click **Delete List**.

Notes

(Edit > Field Notes and Edit > Plan Notes)

Field notes apply to a particular cell and are indicated by a blue marker in the lower left portion of the cell. Plan notes apply to the tax plan in general. Notes can be printed using the *Print > Input Grids* option or from the active grid/active worksheet.

To create a new note or edit an existing note, do the following:

1. To create or edit a field note, select the cell to which the note applies and click **Field Note** or **Ctrl** + **F** to display the *Field Note* dialog.

   To create or edit a plan note, select anywhere in the plan to which the note applies and click **Plan Note** to display the *Plan Note* dialog.
2. Enter a caption in the space provided, if appropriate.
3. Enter the note text in the space provided.
4. Click **OK** to accept the note or click **Cancel** to exit without saving the note.

To delete a note, do the following:

1. Access the note you want to delete by doing one of the following:
   - With the focus on a field to which the note applies, click **Field Note** or **Ctrl** + **F**.
   - Select any cell in the plan to which the note applies, click **Plan Note**.
2. Click **Delete Note**.

Multiple Occurrence Grids Tools

The Add, Insert, and Delete Item commands are available on the *Edit* menu when a multiple occurrence grid (for example, Wage Information) is open. These functions add, insert, or delete rows that contain data, such as the names of employers or the names of dependents.

Add Item

(Edit > Add Item)

To add an item, do the following:

1. With the cursor in the list to which you want to add an item, click **Add Item** or right-click and select **Add Item**. If you are at the bottom of a list, press the **Enter** key to add a new item.

   The new item is added to the bottom of the existing list and is assigned the next sequential number.
2. Enter the data for the new item in the empty detail grid in the bottom pane of the screen.

Insert Item

(Edit > Insert Item)

Insert Item works in the same manner as Add Item, except the inserted item is placed above the currently selected field.

To insert an item, do the following:

1. With the cursor immediately below where you want to insert the item, click **Insert Item** or right-click and select **Insert Item**. The list is automatically renumbered.
2. Enter the data for the new item in the empty detail grid in the bottom pane of the screen.

Delete Item

(Edit > Delete Item)

To delete an item, do the following:

1. Select the item you want to delete and click **Delete Item** or right-click and select **Delete Item**. A confirmation message displays.
2. Click **OK**. The item is deleted and the remaining items are automatically renumbered.

Expand to Detail

(View > Expand to Detail)

A square in the expand column indicates that you can expand to a detail grid.

This square has an arrow in it if data exists in the detail grid for that row.

To expand to detail, do any of the following:

- Click **Expand** or **Ctrl** + **E** on the selected cell.
- Click the square icon in the expand column.

- Right-click and select **Expand to Detail Input** from the menu.
- Click **Input Grids** or select **Grids** to access the *Select Input Grid* dialog from which you can click the grid you want to open.

The icons to the left of the grid name indicate if a grid contains information.

- Grid contains data.

- Grid does not contain data.

Overrides

To override a cell amount derived from data entered on a detail grid, click the amount in the summary grid's cell and enter the new number. Override amounts display in magenta.

Note: Override amounts do not always calculate correctly.

If you clear an override, the amount defaults to the original amount. Detail grids associated with the overridden cell are not deleted when you override an amount.

To remove overrides, do one of the following:

- Select **Tools > Remove All Overrides**.
- Select the cell and press **Delete**.
- Select the cell and select **Edit > Clear > Contents**.

AutoFlow

(Tools > AutoFlow)

The AutoFlow feature copies information entered in a current column to consecutive years within the same case. For example, if a case has four columns, starting with the first year in the case, an amount entered is automatically repeated for the next three years.

If AutoFlow is enabled when an import or copy column is initiated, the data is also imported or copied across all columns. The application retains amounts for subsequent years that are manually entered when the AutoFlow feature is disabled.

To turn AutoFlow on and off, do one of the following:

- Click **AutoFlow**.
- Press **Ctrl** + **A**.
- Select **Tools > AutoFlow**. A check mark indicates the option is enabled. The absence of a check mark indicates the option is disabled.

Calculator

(Tools > Calculator)

CCH ProSystem *fx* Planning provides a calculator for standard mathematical functions. The calculated totals can be transferred automatically to input fields in the Detail grid.

To use the calculator, do the following:

1. Select **Tools > Calculator**.
2. Enter your calculation, using the keyboard or mouse.
3. Click the input field to which you want to apply the results.
4. Click **Apply** and the results populate the input field.

Chapter 5

Print & View Functions

CCH ProSystem *fx* Planning provides a variety of ways to arrange tax plan data for viewing and printing. You can do the following:

- Hide and show columns.
- Show variance columns expressed in dollars or percentages for the *Federal Summary* data.
- View detail information for most fields with one click.
- Edit report sets to create customized reports for each client plan.
- Choose whether to print the lists and notes associated with the tax plan.

Viewing Columns

This feature includes the ability to hide and show columns and to view variance columns.

Hiding and Showing Columns

To hide a column, do the following:

1. Place the cursor in the column you want to hide.
2. Select **View > Hide Column**. Columns are only hidden in the active grid, not on any associated detail grids.

To show hidden columns, select **View > Show All Columns**.

Variance Columns

(View > Show Variance Columns)

Use this feature to compare the values in any two columns on the Federal Summary grid. The resulting grid displays the two comparison columns along with the variance columns showing dollar and/or percentage differences. You can display more than one variance grid at a time.

If you make changes to the data in the detail and variance grids, the changes are made dynamically to the *Federal Summary* grid.

To set up variance columns, do the following:

1. Select **View > Show Variance Columns** to display the *View Variances* dialog. This dialog lists all the columns (years) in the active plan.
2. Select one or both of the *Variance columns* types:
   - **Dollar**. Calculated by subtracting column one from column two.
   - **Percentage**. Calculated by dividing the dollar variance by the column one amount.
3. Drag the two columns you want to compare from the list box to the comparison *Column 1* and *Column 2* positions at the bottom of the dialog.
4. Click **OK** to open a new window containing the variance grid with the comparison and variance columns requested. Click **Cancel** to exit without viewing the comparison.

Print Functions

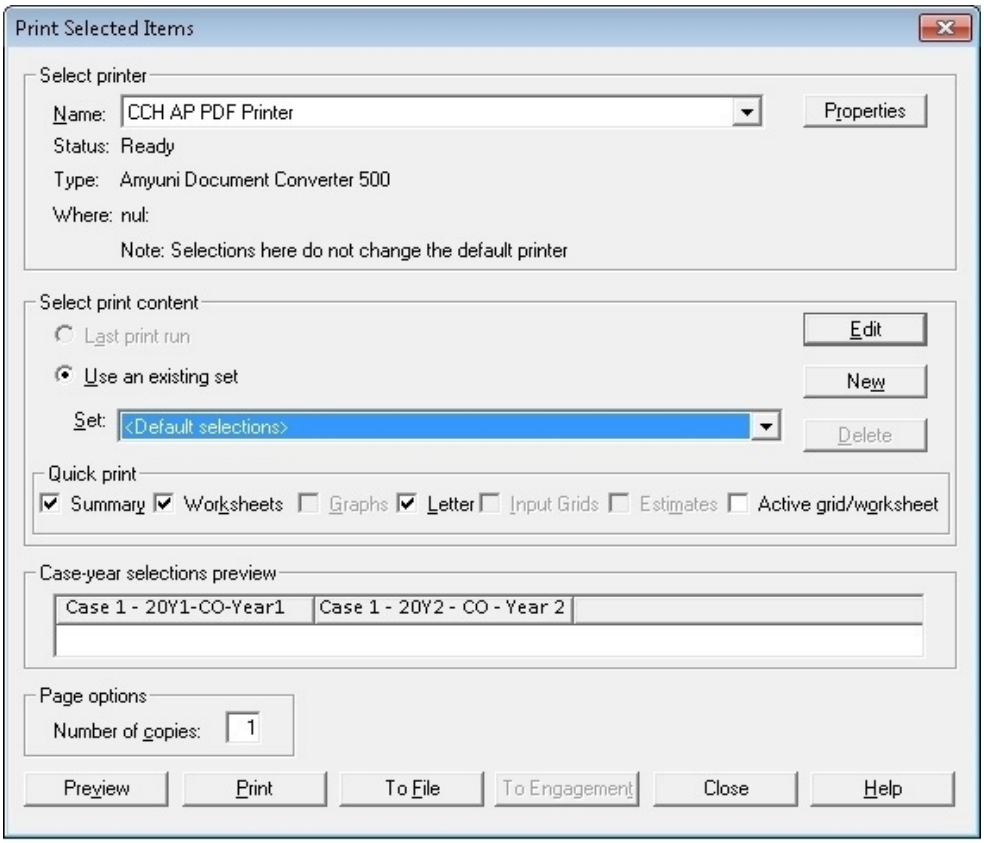
(File > Print)

The reports available are as follows:

- **Plan Summary**. Prints a summarized version of the plan in a format similar to the Federal, Resident State, and Nonresident State summary grids.
- **Worksheets**. Prints a more detailed report of the Federal, Resident State, and Nonresident State summary grids. Offers an option to print custom worksheet selections.
- **Graphs.** Prints the data points identified in the type of graph selected.
- **Letter**. Prints the correspondence letter in the print output.
- **Input Grids**. Prints the grid currently being viewed, a selection of grids in a plan, or all grids in grid format.
- **Estimates**. Prints Federal 1040-ES, state estimate forms for California and New York.
- **Active Grid/Worksheet**. Prints the currently active grid or worksheet.

These reports can be configured in the print set. This includes, where applicable, whether to print associated lists and notes and which case columns should print. With the exception of the Estimates report, a report can display up to five case columns. You can also override the Print defaults for page border, line references, and footer text that have been set in Tools > Planning Defaults > Print Defaults.

In the example, in *Case-year selections preview*, the Start year is indicated as 20Y1. The subsequent year is indicated as 20Y2.



Creating/Editing a Print Set

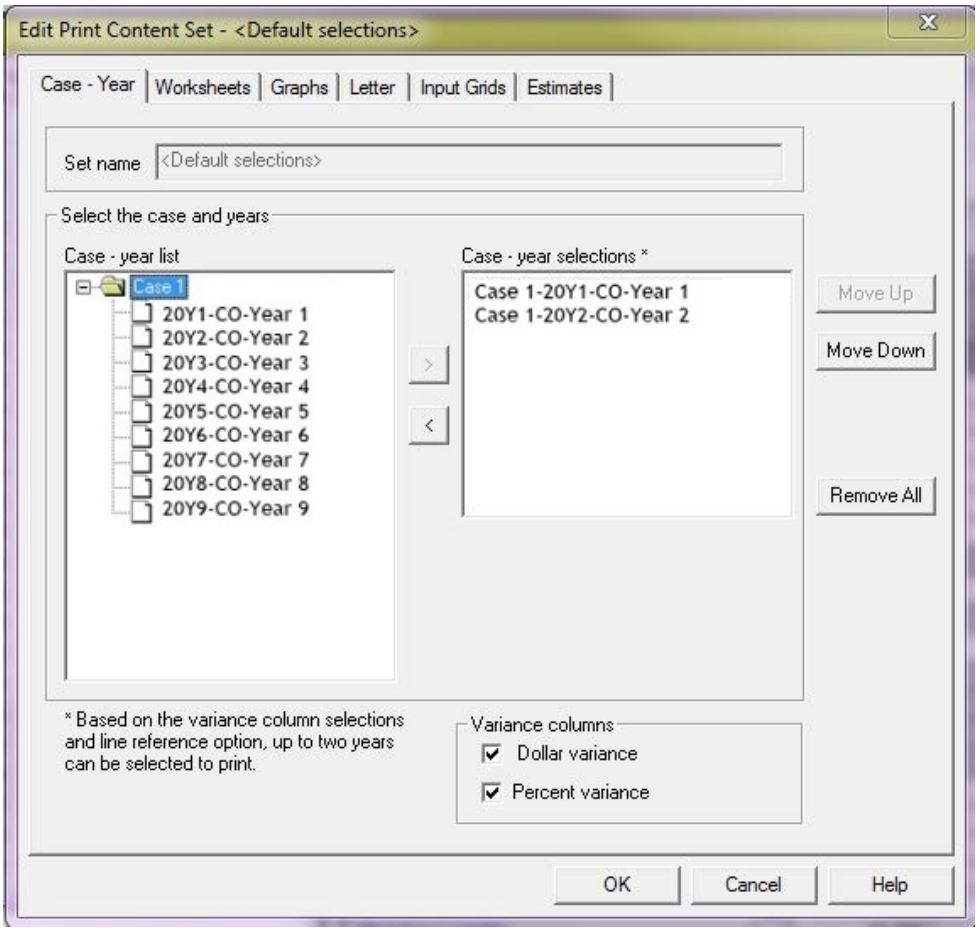
- A default set is present upon opening a plan.
- The default set will print the plan summary, all worksheets that contain data, and the correspondence letter. The first two years of the first case will be printed as well as the dollar and percent variance analysis. The page border and footer options present in the default plan settings will also be applied.
- If alternative print settings are desired, you can edit the default set or create a new set. The default set can not be renamed, but new sets can be named whatever you choose.
- New sets will start with the same settings as the default set.

To create a new print set or edit a print set, do the following:

1. Select **File > Print**. The *Print Selected Items* dialog is displayed.
2. Select either **Edit** or **New**. If editing a print set, the set you want to edit needs to be in the set selection.

Make the appropriate selections on the following tabs on the *Edit Print Content Set* or *Create Print Content Set* dialog.

In the example, the Start year is indicated as 20Y1. Subsequent years, shown in the Case Years, are indicated as 20Y2 to 20Y9.



Case-Year Tab

1. The name of the set you are editing will be displayed. If creating a new set, the set name will default to "Custom Selections #x". You may change it to anything meaningful to you.

   Note: The "Default selections" set name cannot be changed.

2. Move the Case-years to print to the *Case-year selections* list.
3. Select the Percent and/or Dollar variance options to include in the reports.

Notes:

- If you choose to have one type of variance column, you can print to three case-year selections. If you choose to have both types of variance columns, you are limited to two case-year selections.
- The option to include line references, located on the Worksheets tab, will also reduce the number of case-year selections that can be made. Both variance selections and the line references selections cannot be made in the same set.

Worksheets Tab

1. Check *Include plan summary* to include the plan summary in the printed output.
2. Choose *All with data*, *Custom selections*, or *None* to indicate the worksheets to include in the printed output.

   Note: Selected Worksheets will not print if *None* is selected.

3. Check *Print page border* to print a border around the report.
4. Check *Print line references* to print the tax form line references on each line for the following forms:
   - Individual Tax, Page 1 & 2
   - California Tax, Pg. 1 & 2
   - New York State, Page 1 & 2
   - Itemized deductions worksheet, if applicable.
5. Check the Footer option to print a footer on every worksheet.
   - Enter the *Custom footer text* to include in the footer.
   - Select the date and time stamp option to include in the footer.

Graphs Tab

1. Select *Include selected graph(s)* to include the graphs in the printed output.
2. Choose the *Graph(s)* to print.
3. Review the *Graph(s)* type and *Y Axis* data selections.

Letter Tab

1. Select *Include correspondence letter* to include the correspondence letter in the printed output.
2. Choose the *First projection year* to identify the values to be referenced in the letter.
3. Enter desired *Greeting* and *Closing*.

   Note:The default greeting is 'Dear Taxpayer First Taxpayer Last and Spouse first Spouse last'. If an alternate greeting is desired, click *Use custom greeting* and enter the desired text.

4. Select the paragraphs to include in the correspondence letter.
5. Check *% Change from base year* and/or *$ Change from base year* to include those values in the letter text.
6. Select the *Base year* to use as the baseline when calculating the % and $ variances.

   Note: Custom Letterhead will not display in print preview.

Input Grids Tab

1. Choose *All with data*, *Custom selections*, or *None* to indicate the Input Grids to include in the printed output.

   Note: Selected Input Grids will not print if *None* is selected.

2. Check the *Print detail lists* box to print lists associated with selected grids.
3. Check the *Print notes* box to print field and plan notes associated with selected grids.

   Note: Detail Lists and Notes will not display in print preview.

Estimates Tab

1. Select the *Federal estimate* box to include the current year 1040ES in the output.
2. Select the *California estimate* box to include the current year 540ES in the output.
3. Select the *New York estimate* box to include the current year IT-2105 in the output.

Note: If a current estimate year is not present in the case-year selection on the case-year tab, the options will not be available.

Printing a Plan Summary

(File > Print)

1. Click **Print** or **Ctrl** + **P**.
2. Select **Last print run** or **Use existing set** in the *Select print content* section.
3. Verify that **Summary** is selected in the *Quick print* section.
4. Review the *Case-year selections preview*.
5. If necessary, select **Edit** or **New** to modify the report content.
6. Select Preview, Print, To File, or To Engagement (if available).

Printing a Worksheet

(File > Print)

1. Click **Print** or **Ctrl** + **P**.
2. Select **Last print run** or **Use existing set** in the *Select print content* section.
3. Verify that **Worksheets** is selected in the *Quick print* section.
4. Review the *Case-year selections preview*.
5. If necessary, select **Edit** or **New** to modify the report content. Select the *Worksheets* tab to update the page options or footer options.
6. Select Preview, Print, To File, or To Engagement (if available).

Printing a Graph

(File > Print)

1. Select **File** > **Print** .
2. Select **Last print run** or **Use existing set** in the *Select print content* section.
3. Verify that **Graphs** is selected in the *Quick print* section.
4. If necessary, select **Edit** or **New** to modify the report content. Select the *Graphs* tab to update the graph(s) to include.
5. Select Preview, Print, To File, or To Engagement (if available).

Printing a Letter

(File > Print)

1. Select **File > Print**.
2. Select **Last print run** or **Use existing set** in the *Select print content* section.
3. Verify that **Letter** is selected in the *Quick print* section.
4. If necessary, select **Edit** or **New** to modify the report content. Select the *Letters* tab to update the greeting and closing as well as the data you would like to include in the letter.
5. Select Preview, Print, To File, RTF, or To Engagement (if available).

   Note: Custom Letterhead will not display in print preview.

Printing Input Grids

(File > Print)

1. Click **Print** or **Ctrl** + **P**.
2. Select **Last print run** or **Use existing set** in the *Select print content* section.
3. Verify that **Input Grids** is selected in the *Quick print* section.
4. Review the *Case-year selections preview*.
5. If necessary, select **Edit** or **New** to modify the report content. To change your selections for lists and notes, select the *Input Grids* tab and check in the appropriate boxes in the *Options* section.
6. Select Preview, Print, To File, or To Engagement (if available).

   Note: Lists and Notes will not display in Print Preview.

Printing Estimates

(File > Print)

1. Click **Print** or **Ctrl** + **P**.
2. Select **Last print run** or **Use existing set** in the *Select print content* section.
3. Verify that **Estimates** is selected in the *Quick print* section.

4. Review the *Case-year selections preview*.

   Note: A current calendar year must exist in the file.

5. If necessary, select **Edit** or **New** to modify the report content. Select the *Estimates* tab to configure which estimates you want to print.

   Note: If the case selected is configured for California or New York, the state estimate box is available to be checked.

6. Select Preview, Print, To File, or To Engagement (if available).

Printing an Active Grid/Worksheet

(File > Print)

To print the active grid/worksheet, do the following:

1. With a grid/worksheet open and active, click **Print** or **Ctrl** + **P**.
2. Select **Last print run** or **Use existing set** in the *Select print content* section.
3. Select the **Active grid/worksheet** option in the *Quick print* section.
4. If detail lists and/or notes are desired, select a set with lists and notes defined on the *Input Grids* tab. See *Printing Input Grids* on the previous page for the order in which lists and notes print. Edit a set or create a new set, if needed.
5. Review the *Case-year selections preview*.
6. Select Preview, Print, To File, or To Engagement (if available).

   Note: Lists and Notes will not display in Print Preview.

Printing to a PDF File

To print to a PDF file, do the following:

1. Select **File > Print**.
2. Select the desired print content.
3. Click **To File**.
4. Select **PDF** from the *File format* list.
5. Click **OK**.

Printing to Engagement

Add PDF files created from CCH ProSystem *fx* Planning reports to a workpaper tab in a CCH ProSystem *fx* Engagement or CCH ProSystem *fx* Workpaper Manager binder.

To print reports to CCH ProSystem *fx* Engagement or CCH ProSystem *fx* Workpaper Manager, you need to establish the following in Engagement:

- You must have a valid Engagement user name and password.
- You must be a team member assigned to the binder you want to store the file in.
- You must be assigned the rights to create a new workpaper for the binder and the binder must be closed.
- You must have a licensed version of Engagement for this process.

To export report data to Engagement, do the following:

1. Select **File > Printer Setup**.
2. Select **CCH ProSystem *fx* Engagement PDF Converter**.
3. In the *Paper* section, select a size from the *Size* drop-down list.
4. Select **Portrait** or **Landscape** in the *Orientation* section.
5. Click **OK**.
6. Select **File > Print**, and then select print options.
7. Select **To Engagement**.
8. Enter your login information, if necessary, and click **OK**.
9. Enter a PDF file name and click **OK**.
10. Click **Next** on the *Insert Workpaper Wizard* dialog.
11. Select the document to insert on the *Select Documents to Insert* dialog and click **Next**.
12. In the Local File Room, select the client folder and then the binder where the report PDF file is to be placed.
13. Click **Next**.
14. Enter an index number and name. You may keep the default name, which reflects the product name, or enter the PDF file name.
15. Click **Finish** to display a summary dialog listing the binder, binder tab, and workpaper index number and name.
16. Click **Insert** if the information is correct. Click **Back** to change any of your selections.

Appendix A

STANDARD OPTIONS

Help Options

The Help system provided in CCH ProSystem *fx* Planning includes:

- Online system Help
- Detail grid cell-level tax Help
- Access to the Customer Support website.

To access the online system Help, do the following:

1. Select **Help > Help Topics** or click **Help**.
2. Use the *Contents*, *Index*, or *Search* tabs to find the topics for which you need help.

To access row Help, do the following:

1. Click a field within a detail grid row.
2. Press **F1**, click **Field Help**, or right-click and select **Field Help** from the menu that displays.

CCH ProSystem *fx* Planning support on the Web

The Customer Support website can be accessed by selecting **Help > CCH ProSystem fx Planning support on the Web**. The various areas accessible from the submenus are as follows:

- Product Home Page
- Browse our Knowledge Base
- CCH Software News
- Contact Support
- Start a Remote Support Session
- My Account
- Product Guides

Alternate Access

You can also access the website using the following address: https://support.cch.com/.

Navigation Bar

The navigation bar can float or be docked to the left or the right.

To turn the navigation bar on or off, do the following:

1. Select **View**.
2. Click **Navigation Bar**. Select this option to enable the navigation bar or clear the check mark to disable the navigation bar.

Status Bar

The status bar, located in the lower border of the interface window, indicates which operations are in progress.

To turn the status bar on and off, do the following:

1. Select **View**.
2. Click **Status bar**. Select this option to enable the status bar or clear the check mark to disable the status bar.

Toolbar

The toolbar's default location is directly under the menu bar of the application window. It can be turned on or off, resized, moved, or docked vertically to any of the four window edges.

To turn the toolbar on and off, do the following:

1. Select **View**.
2. Click **Toolbar**. Select this option to enable the toolbar or clear the check mark to disable the toolbar.

Tooltips

Tooltips are provided for the toolbar buttons. To display the button name, place the cursor on the button.

To turn tooltips on and off, do the following:

1. Select **View**.
2. Click **Tooltips**. Select this option to activate tooltips or clear the check mark to deactivate tooltips.

Window Views

To arrange windows, select **Window** and then one of the following options:

- **Cascade**. Open windows display one on top of the other.
- **Tile**. Arranges open windows according to the Windows® standard. That is, if two windows are open, they appear one above the other.
- **Arrange Icons**. Arranges minimized grid icons at the bottom of the screen.

To select an open window, select the Window menu and choose from the list of open windows displayed at the bottom of the menu. The active window is indicated with a check mark. You can also click anywhere on a window to make it the active window.